SYSPRO Avanti Guide

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SYSPRO Pty (Ltd)

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WHAT'S CHANGED SINCE THE LAST VERSION?

Sub торіс	Read more
How to define multiple Workspaces in the HOME menu, when not associated with a role.	Designing Workspaces in Avanti
Flowgraph items can now launch alternative Flowgraphs or Workspaces.	Designing a Flowgraph
Access the SYSPRO Online Help by pressing F1 from within Avanti.	<u>Accessing the SYSPRO Help in</u> <u>Avanti</u>
Toolbar buttons for Customized Panes are now surfaced in the Visual Designer and can be added to a Web View.	<u>How to add a Customized Pane to</u> <u>a Web View to show in Avanti</u>
Notepads that are built into any application can now be added to a Web View.	Adding a NOTEPAD to Avanti
Present Application Builders in Avanti.	<u>How to present Application</u> <u>Builders in Avanti</u>
The following VBScript functions are now supported for grids in Avanti: • OnPopulate • OnSubmit • OnRowSelected • OnDblClick • OnLinkClicked • OnAfterChange Additionally, the following functions are now supported for customized pane list views: • OnDELPressed • OnChecked VBScript Desktop Alerts are now surfaced as Toast Notifications in Avanti.	<i>Additional reading:</i> <u>VBScript functionality support in</u> <u>Avanti</u>

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ANNOTATION

This document provides information about SYSPRO Avanti, the web based version of SYSPRO.

For the remainder of this document SYSPRO Avanti is referred to as Avanti.

The contents of this document are subject to change.

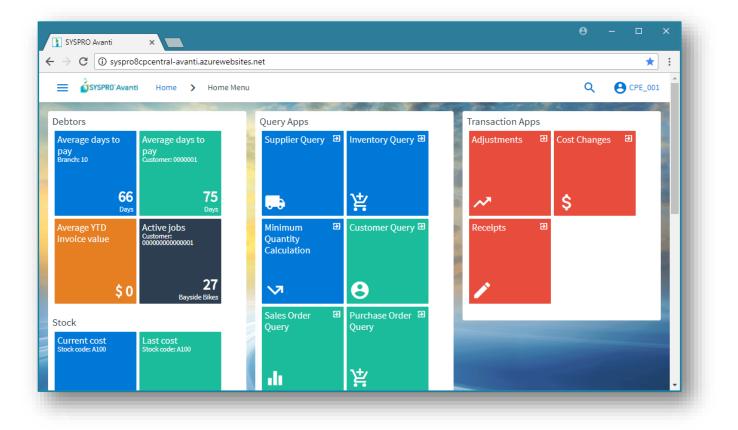
INTRODUCING SYSPRO AVANTI

Avanti is SYSPRO's web based offering.

Avanti (an Italian word meaning *forward* or *ahead*) is designed to run SYSPRO's applications in the private or public cloud, but Avanti can also be deployed on premise.

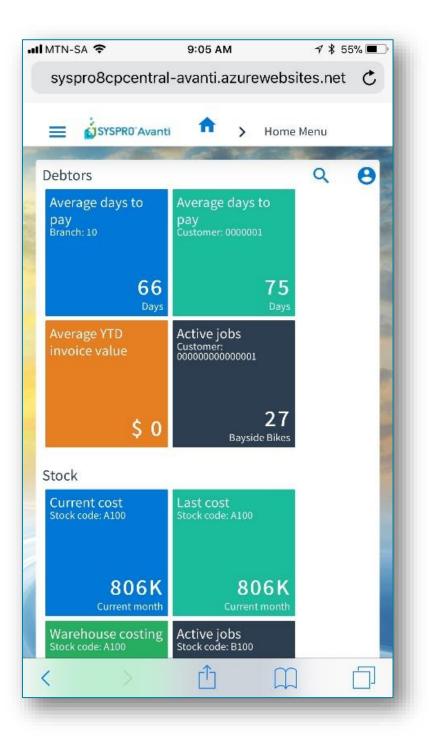
Avanti can be used in parallel with the SYSPRO Windows Client version, allowing a user to use either Avanti or the Windows client version to complete the same task.

Being a native web application, Avanti is accessible on any device, on any platform, from anywhere.



RUNNING AVANTI ON THE DESKTOP

RUNNING AVANTI ON THE IPHONE



AVANTI'S BENEFITS

Users may selectively deploy either Windows or the web based solution.

A dual user interface provides customers with the ability to select the best UI for the specific task at hand.

Familiarity

For customers used to the SYSPRO Windows client version, Avanti will be quite familiar as the behavior of the applications is designed to be similar.

Ease of deployment

Avanti does not require any installation on the Windows desktop or device. All that is required is a web browser.

Consistent design across all applications

Avanti is designed to be intuitive and easy to navigate, with consistent layouts that make it easier for users to become quickly adept at the execution of tasks, and with a minimum of clicks to complete tasks.

Tailoring

Avanti has a Visual Designer that allows administrators to change the layout of any application, and to add or remove functionality. This allows customers to streamline any operation. Additionally, some of the customization implemented in the same SYSPRO Windows client application will be automatically applied in Avanti. Avanti also allows users to create completely new functionality and to have this available in Avanti.

THE DIFFERENCES BETWEEN AVANTI AND ESPRESSO

While SYSPRO Espresso and SYSPRO Avanti have similar characteristics (they are browserbased applications, and both were created using modern web technologies), the two products are designed for different types of users.

Espresso is specifically targeted at mobile workers who don't require the full and complex functionality of SYSPRO, but require offline capability.

Avanti is aimed at users who require the full-featured functionality of SYSPRO, but want to access it from a browser.

SYSPRO Espresso	SYSPRO Avanti
Natively designed for mobile devices.	Natively designed for the browser.
User experience is optimized for mobile devices.	User experience is optimized for the browser.
Offline capability.	No offline capability.
Applications are purpose-built and require development effort.	Applications are created using the Visual Designer and require no development effort.
Espresso is charged by user logon.	User access is based on the concurrent SYSPRO user license.
Espresso applications may be chargeable, and are licensed by user count.	Any application in SYSPRO may be available in Avanti as part of the concurrent licensing.

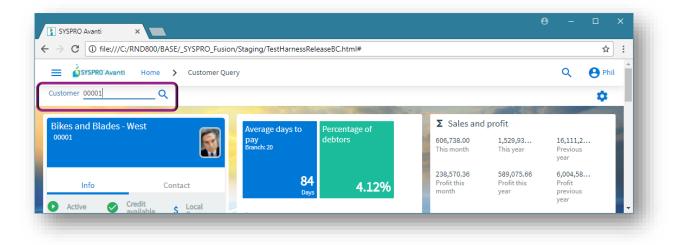
USER INTERFACE

Avanti's design guidelines provide a consistent and intuitive user interface.

Action buttons are always located on the right of the toolbar of the current application:

SYSPR0'Avanti	Home > Receipts				Q Phil
		-			8 \$
Varehouse *	E Eastern Warehouse	٩	Transaction details	0.00	
Stock code *	A100 UNIRAK BOX BEAM 1.5" X 2.5" X 48"	Q	Receipts posted	Receipts value	
Quantity *			Stock information		^
Receipt cost *	349.96899		Stock on hand	2233203/00	
Cost uom	BOX		Stock available	-119126108/00	
Cost basis	O Unit		Stock free	2233187/00	
	O Total		In transit	100/00	
Multiple bins	Edit	Q	Allocated	121359311/00	
Lot	0000 00 00		· · · · · · · · · · · · · · · · · · ·	1200/00	
Lot expiry date	0000-00-00		On order		
Reference			On back order	121359295/00	
Notation		Q	In inspection	0/00	
Ledger code	30-2010	<	Cost uom	BOX	
			Current cost	349.96899	
			Journal entries		~

Entry fields on the toolbar are located on the left:





Descriptions for form fields appear beneath the key value:

SYSPRO'AV	anti Home > Wareho	ouses						Q	\rm Phi
/arehouse E							•	8	•
escription *	Eastern Warehouse		Options						~
osting level	Company 🗸	·	⊟ GL accounts						~
osting method	Average costing		Warehouse control		Goods in transit control		WIP inspection		
ultiple bins in use	No		30-1520	Q	30-1540	Q	Wir inspection		Q
xed bins in use	Yes		Warehouse Control - East		Inventory in Transit - East		Work in progress		
egative stock	No		Warehouse variance	Q	Dispatched but not invoiced 30-1130	~			Q
lowed			30-5811 Warehouse Variance - East	_ 4	30-1130 Unbilled Dispatches - East	Ť	WIP variance		
ext stock take sket number	000000000000000000000000000000000000000		GRN suspense		Automatically cleared varian	ces			Q
excernamoer			30-2010	Q		9			
Delivery Addr			GRN Suspense - East						
Delivery Addr	ess								
			Image: Numbering						~

Toast notifications provide unobtrusive messages if entries are not correct:

SYSPRO Avanti X	`	θ			×
\leftrightarrow \rightarrow C (i) file:///C:/RND800/	BASE/_SYSPRO_Fusion/Staging/TestHa	arnessReleaseBC.	.html#	☆	:
🚍 📩 SYSPRO'Avanti 🏠	> Inventory Query			Q	0
Stock code B100-TEST	A Invalid Stoc	k Code			2
Lots expiring Lots on ho Stock code	Stock code 'B1	.00-TEST' not for	und		
O Within 30 days	0 Stock code Stock code				
📜 Purchasing information					
Supplier	0 Lead time in days	0 Dock to stock da	ays		
)≡ Units of measure					~
				-	

TAILORING AVANTI

You can use the Visual Designer in either Avanti or the Windows client version to design applications for use in Avanti.

In Avanti, click on the Settings icon at the top right of the page to design the view:

Customer Query Stock Query Refresh WebView Design Web View Design Web View Order Intake Sales Order Bank Q Query Marce Particular Insight cards	SYSPR0'Avanti	^ ,	Home Menu	Q	θ
Order Intake 🔁 Sales Order 🔁 Bank Quinsight cards	Customer Query Stock	Query	Refresh	WebView	*
Order Intake Duery Sales Order Duery Bank Query Bank Query	and the second			Design Web V	/iew
			🔁 🛛 Bank Qi	Insight cards	•

The Visual Designer displays the current layout.

You can add or remove components, or start from new to design your own view:

Add toolbar item Customer Query Stock Query	Add toolbar item Refresh WebView
Add layout section	🛃 Add layout section
B	User Sessions
Program tiles Progra	
Average days to pay for company KPI - Financials	

Note: If you wish to design applications at the **Role level** or **SYSTEM-WIDE** level, then you must be in Design Mode within the SYSPRO Windows client version.

You can then launch an application in SYSPRO Windows client and select the option to **Design Web View** from the settings icon:

Panes Cards Cards Cards Cards Cards Cards Customization Profiler Reset Layout Hide Web View F11 Show Pane Titles F12 Hide Pin Buttons Show List View Toolbar	×
Cards Cards Cards Cards Cards Cards Cards Customization Profiler Reset Layout Hide Web View F11 Show Pane Titles F12 Hide Pin Buttons	00
Manufacturing Queue Persona Edit Web View ies P Customization Profiler Reset Layout Hide Web View F11 Show Pane Titles F12 Hide Pin Buttons Hide Pin Buttons	≻
Queue P Customization Profiler ies P Reset Layout Hide Web View F11 Show Pane Titles F12 Hide Pin Buttons Hide Pin Buttons	+
P Customization Profiler Reset Layout Hide Web View Hide Web View F11 Show Pane Titles F12 Hide Pin Buttons Hide Pin Buttons	
Hide Web View F11 Show Pane Titles F12 Bank Query	
Show Pane Titles F12 Bank Query	
Bank Query Hide Pin Buttons	1
Bank Query 🔁	2
Barn gacij	
	+
Auto Close Floating Panes in Web Views	

Designing applications is simply a matter of selecting the Form field, Grid list, Tile or Card and add it to the layout. There is no development coding required by the user to design layouts.

Note: To design a web view the operator security option **VBScript editing** must be enabled:

<u>F</u> ile				
Accept	and Close 🥱 Cancel			
Allow	Activity description	Module 🔺	e.net specific	activity ^
×	Forms - Customization by operator	Customization		
¥	Toolbars - Customization by operator	Customization		
Z	VBScript editing	Customization		
 Image: A start of the start of	Docking panes - do not prompt when removing windows	Customization		
~	Save docking layout when using roles / industry / system	Customization		
	Save list view lavout when using roles / industry / system	Customization		
	Items:350			

Once you have designed your own Web View, you can always delete the web view, either by using the Visual Designer in SYSPRO, or when you click on the Settings icon in Avanti the option **Delete Web View** will appear beneath **Design Web View**.

USING AVANTI

The login page for Avanti is similar to that in the Windows client version:

rSPRO'Avanti		Mart Martin and Con
		Re Creat
	Sign in	and the second second
	User name Phil	and the second se
	Phil	
		and the second se
	M	and the second se
	Company 0 - The OUTDOORS Company	and the second se
	The OUTDOORS Company	COLUMN STREET,
	Company password	
	Sign in	

When you login to Avanti it is the equivalent to logging into the Windows client version, in the sense that it uses the same User credentials, and the same concurrency licensing model.

You may use Avanti and the Windows client version at the same time, as long as the user is allowed concurrent use. If you login to Avanti using an operator name that is already logged in (and without the operator setup option **Allow concurrent use of this operator** checked) then the other operator will be logged out.

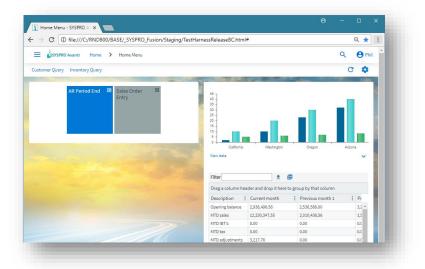
Security and other options defined for the user apply equally no matter if you login to Avanti or the Windows client version. Similarly, the security principles and options apply in Avanti for whichever company you select.

Avanti is a web based product and as such the user experience differs to that of a Windows client.

This section documents these differences.

NAVIGATING AROUND AVANTI

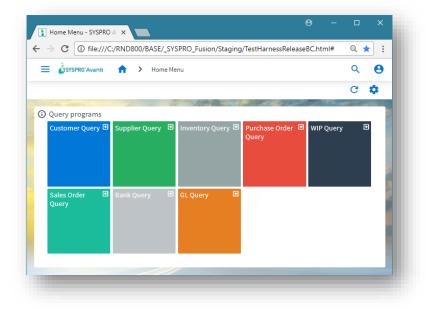
Applications in Avanti are launched either by clicking on a Tile in the **HOME Page** or from the Hamburger Menu options.



The **HOME Page** in Avanti is defined using the Visual Designer and typically can contain a mixture of Business Insights, Program Tiles, and Cards.

Unlike the Windows client version, the **HOME Page** in Avanti can be defined at the Role level, giving administrators the ability to decide on the content for users.

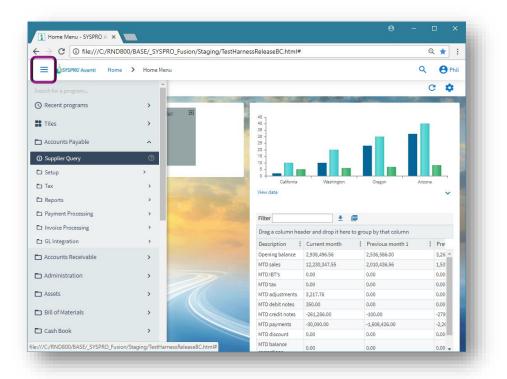
If your **HOME Page** has yet to be defined either at the role level or for personal use, then you will be presented with a pre-defined 'primary view', which may look like this:



Once you have defined your own view, it will always be shown as the default view labelled **Favorites**.

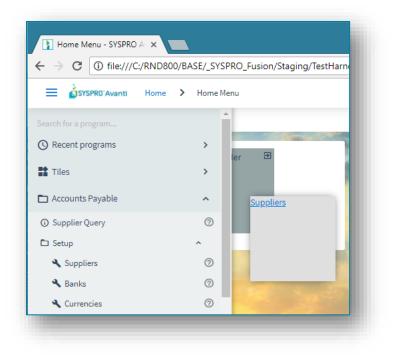
USING THE HAMBURGER MENU

Clicking on the Menu icon (the hamburger at the top left of the **HOME Page**) shows a list of available Avanti programs:



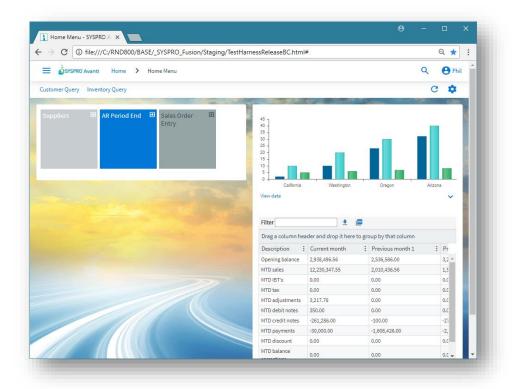
You click on a program to run it.

Alternatively, you can add a program to your current web view either by designing the view using the Visual Designer, or you can drag items off the menu directly onto a Tile section.

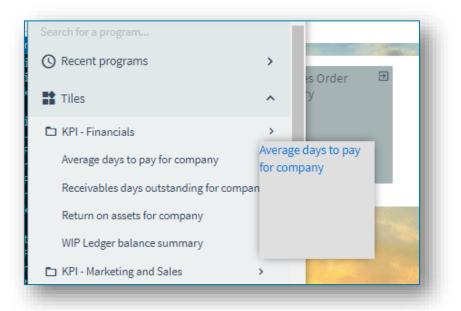




In the above screen shot, the **Suppliers** program is being dragged onto the tile section, which will then look like this:



Similarly, you can drag any Business Insight onto a tile section:



Additionally, you can drill down to the detail of any Business Insight simply by clicking on the item, either in the menu list, or by clicking on the 'tile' itself after it has been dragged onto a tile section.

Thus, clicking on the menu item **Average days to pay for company**:

$ \rightarrow$ C (i) file:///C:/RND800/BAS	E/_SYSPRO	O_Fusion/Staging/Te	stHa	rnessReleaseBC.html#	i .		Q	. ★ 🗄
E SYSPRO'Avanti Home > I	Home Menu						Q	🕒 Phil
	*						0	±
							C	· •
3 Recent programs	>							
		AR Period End 🛛 🔁		46 -				
Tiles	^	Average days to pay		40			- 5	
T KPI - Financials	>	incluge adje to paj						
	_	Filter		± 📖				
Average days to pay for company	0	Deep a selvera has de		drop it here to group by t				
Receivables days outstanding for company	0							
Return on assets for company	0	Customer				Customer Branch	-	1
	~	0000001		ayside Bikes	100	10	^	
WIP Ledger balance summary	0	0000002	-	likes & Blades - North	100	10		
🗅 KPI - Marketing and Sales		0000008		arden and Sports Ianiac Sports - North	102	10		
Average YTD invoice value for company	0	0000010		Ianiac Sports - North	100 201	10		
	-	0000011		Ianiac Sports - South Ianiac Sports - East	300	<u>20</u> 30		
Average YTD invoice value for salesperson	0	0000012		lighway Leisure	700	70		10.8
Average invoice value for company	0	0000071		IC Cycles	700	70		
Average invoice value for customer class	0	000011		ic cycles	100	10		
-	0							
Days since last sale for company	0							
GP margin as percentage of sales for				into objustmenta	0,641110	0.00	_	-
company	0			MTD debit notes	350.00	0.00		0.00
🗅 KPI - Operations				MTD credit notes	-261,286.00	-100.00		-279
WIP at a glance labor cost	0			MTD payments	-30,000.00	-1,608,426.00		-2,26
Ŭ.	Ŭ			MTD discount	0.00	0.00		0.00
WIP at a glance labor issued :///C:/RND800/BASE/ SYSPRO Fusion/Staging	0			MTD balance	0.00	0.00		0.00 -

...or clicking on the tile itself after it has been dropped into a tile section, will show the insight detail:

C i file:///C:/RNE	D800/BASE/_SYSPRO	_Fusion/Staging/TestHarne	ssReleaseBC.htm	ıl#					ର୍ ★
SYSPR0'Avanti Hom	ne 🕨 Home Menu							Q	e Phi
-									-
omer Query Inventory Que	ery							C	÷ 🗘
and the second			and the second	1 1 1	Constant Ser	and the second second	and a second second		1.00
Average days to Su	poliers 🛛 🗛	Period End 🛛							
pay Company: EDU1	Average days to pa	ý					- 1	= ×	
Company, EDU1								-	
	Filter	± 📟							
41	Drag a column he	ader and drop it here to group b	y that column						
Days	Customer	Customer Name	Salesperson	:	Customer Branch		Age of :		1 m 1
Sales Order 🛛 🔁 Entry	0000001	Bayside Bikes	100		10		75 4		
Entry	0000002	Bikes & Blades - North	100		10		153		.13
	8000000	Garden and Sports	102		10		66		~
	0000010	Maniac Sports - North	100		<u>10</u>		100		
	0000011	Maniac Sports - South	201		20		51		
	0000012	Maniac Sports - East	300		<u>30</u>		51		
	0000070	Highway Leisure	700		70		0		Pr
	0000071	CC Cycles	700		70		0		3.2 *
									1,5
									0.0
									0.0
									0.0
	4						•		0.0
						1-80	f 8 items	-	-21
	And the second		MTD payments	-30,000	0.00	-1,608,426	.00		-2,
			MTD discount	0.00		0.00			0.0
			MTD balance						

Note: As soon as you have dragged a program or business insight onto a tile section, Avanti will save that view for you. If you are in the **HOME Page**, then this will now become your personal view.

If you wish to adjust your **HOME Page** even further, then you will need to use the Visual Designer (see further on in this document).



				8	0
Warehouse *	Q	Transaction details	0.00		
E Eastern Warehouse Stock code *	4	Adjustments posted	Adjustments value		~
в100 win 2PNL 6068 X0 WHT137 (71 1/2" X 79 1/2" Quantify * 0.000	<u> </u>	Journal entries			•
Bin location E Serial numbers Edit	Q	ALC: NO.			
Update original quantity Votation					
Reference					
Ledger code 30-5620	Q				

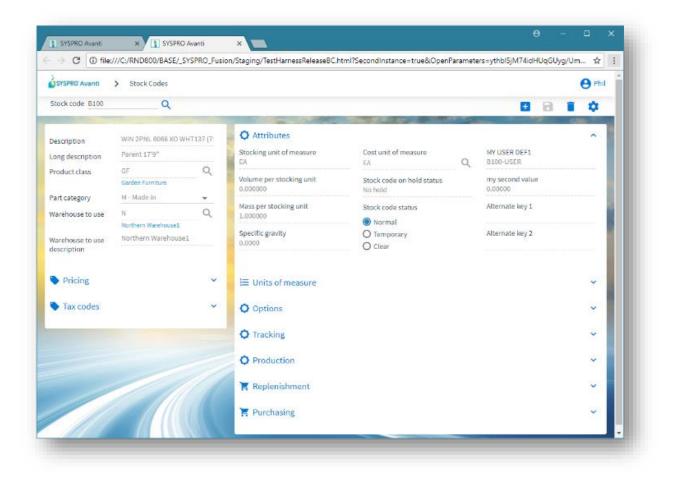
Avanti applications typically consume the entire page:

But if the application only surfaces a few fields, then it is shown in a popup window, as in the following example for the maintenance of Buyers:

stomer Query	Stock Query		Refresh WebView
	Sales Order Bank Query	Query ²⁰ Average days to pay Company: 0	Product Classes 3
	Buyers		×
	Buyer AG		👔 💠 👘
	Name *	Anthony Gardner	
	Email Address	AnthonyGardner@OUTDOORS.com	
000,000 -			
- 000,000 -			
.000.000 -			
- 000,000			
0 4	FB	GB	NB
-			

To use another application, you can click on the **HOME** button, which will return you to the **HOME Page**.

Alternatively, you can remain in the Avanti application and click on the Menu icon to select another application. In this case, the selected application will be shown in a new TAB in the browser:



In this way you can have multiple applications running simultaneously and you can switch between them as required.

ACCESSING THE SYSPRO HELP IN AVANTI

If you want to access Help and Reference information, simply press F1 from within Avanti and the SYSPRO Help website will open in a new browser tab.

LOGGING OUT OF AVANTI

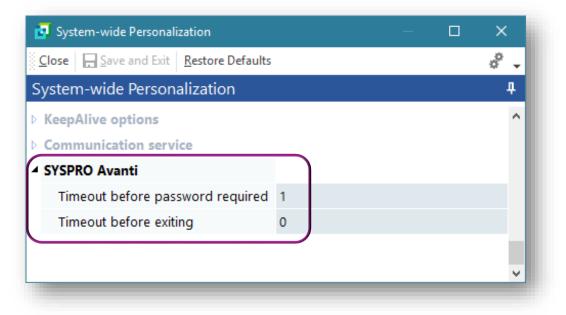
To exit Avanti, simply close the browser, or click on the **Sign out** button to exit Avanti and return to the Logon page (to change to a different company or user).

If you are currently in a transactional application then you will be prompted if you wish to leave the site.

PASSWORD PROTECTION IN AVANTI

By default, a timeout of 10 minutes is imposed on any user who logins to Avanti. After this timeout the system will request the operator's password to continue (even if that password is blank).

You can adjust the period of the timeout using the **System-Wide Personalization** program and adjust the option **Timeout before password required** as appropriate:



In addition, you can impose a further timeout (in minutes) after password window has appeared.

If the timeout expires then Avanti will exit completely back to Login screen. In both cases, a timeout value of 0 indicates no timeout.

PREDICTIVE SEARCH AND SEARCHING IN AVANTI

Predictive Search is optional in Windows client, whereas in Avanti it is automatically in use. Moreover, the method of 'browsing' in Avanti is quite different to that used in SYSPRO.

As you start typing into a 'key field' (such as Stock code, Customer etc.) predictive search will display the items that match the filter criteria. You can use the Windows client version to modify how these filter criteria behave using the program **ESPSRC**.

B100	B100 WIN 2PNL 6068 XO WHT137 (71 1/2" X 79 1/2") GF EA
WIN 2PNL 6068) I/2") ^{Sarent 17'9"}	BB100 Energy Drink SPEC EA
1 - Made-in	CB100 0 in 30 days SPEC Active vision
AB - Alan Brown Planner	AG - Anthony Gardner Buyer

Next to any key field in Avanti is the Search button:

Most searches will be shown in a generic search window, explained below. Occasionally, a search is too complex for the generic search and in that case a special search window will be shown.

Q

The generic search window shows a FILTER pane, and a SEARCH pane:

er		÷	Search						
		*	Search						
Classification		~	Results: 25 results (0.	25 seconds)					2
Classification			Customer	Customer name	Contact name	Telephone nu	Customer on hold	Actions	T
Contact		~	0000001	Bayside Bikes	Karen Saunders	206-555-4562		Actions	1
*			0000002	Bikes & Blades - North	Susan Brown	416-555-8256		Actions	
Credit		~	0000003	Bikes & Blades - South	Helen White	011-555-4262		Actions	
V or care			0000004	Bikes & Blades - East	Judy Davis	612-555-5454		Actions	
Descriptive		~	0000005	Cash Sales				Actions	
VDescriptive			0000006	Country Gardens - East	Philip Smythe	612-555-7485		Actions	
Cast_transacti	on_date	~	0000007	Country Gardens - South	Justine Munroe	021-555-7485		Actions	
			8000000	Garden and Sports	Cathrine Davids	604-555-1523		Actions	
Location		^	0000009	Grand Adventures	Carol Donald			Actions	
Branch	- All		0000010	Maniac Sports - North	Jeremy Bright	847-555-8756		Actions	
			0000011	Maniac Sports - South	Louise Bright	334-555-9855		Actions	
	10		0000012	Maniac Sports - East	Diane First	205-555-1221		Actions	
:			0000013	Out of Africa	Thana Green	011-555-2123		Actions	
	20							1 - 20 of 25 ite	ems
	30	-							

Clicking on a row in the grid will return the key value.

You can filter the data returned in two ways:

- Type into the **Search...** box the value you are searching for. The data is filtered across all columns in the database as you type, like a Google search. As an example, if you are looking for a customer whose telephone number contains 4562, simply type in 4562.
- Some searches are shown with special filters in the FILTER pane.
 For example, the CUSTOMER search will automatically show a filter across all BRANCHES in the LOCATION category. Simply click the Branch or Branches you would like to include and the data will be instantly refreshed. Note that the FILTERs work across all customers.

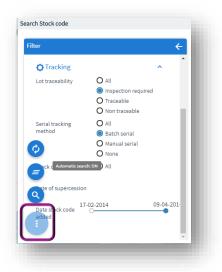
Here is another example, using the STOCK CODE search, so that you can select specific types of items such as TRACEABLE only.

er	•	Search					
		 Search 					358
Tracking	^	Results: 358 re	esults (1.19 seconds)				
Lot traceability	All	Stock code	▼ Description	▼ Product class	▼ Stocking unit o	▼ Manufacturing	▼ Lot traceab
	 O Inspection required O Traceable 	A100	15 Speed Mountain Bike Boys	МВ	EA	N	Non traceabl
Serial tracking Mall Method Manua None	Non traceable	A101	15 Speed Mountain Bike Girls	мв	EA	Ν	Non traceabl
	O Batch serial	A102	15 Speed Mountain Bike Ladies	мв	EA	Ν	Non traceabl
	•	A103	15 Speed Mountain Bike Men	мв	EA	Ν	Non traceabl
Stock code status	O All	A110	18 Speed Mountain Bike Boys	мв	EA	FG	Non traceabl
Date of supercession		A111	18 Speed Mountain Bike Girls	мв	EA	Ν	Non traceabl
Date stock code	02-2014 09-04-20	A112	18 Speed Mountain Bike Ladies	мв	EA	Ν	Non traceabl
added		4					•

Click the

button for additional actions:

- Clear all filters.
- Switch off automatic searching. This allows you to select multiple search criteria and then click on the search button. With automatic searching on, as you change criteria the data is being immediately searched.



Note: The FILTER pane and the COLUMNS shown for each key type are pre-built into Avanti

and cannot be currently changed. In a future release, you will be able to customize the FILTERS pane and adjust the column headers shown.

Additional features available:

- Click on a column header to sort the data.
- The grid shows by default the first 50 rows, but you can use the slider to show as many rows as you would like.

USING WINDOWS IN AVANTI

Applications in Avanti are designed to show most information in a single page. Where appropriate, the use of popup windows can surface additional information. For example, in the Inventory Query users can view Movements and Warehouse history lists.

Such lists are shown by default in popup windows that can be resized and repositioned in the browser. It should be noted that such behavior can easily be changed using the Visual Designer and make these lists appear in the single page.

tock code B100	Q							\$
	HT137 (71 1/2" X 79 1/ Movements	2")	Lots expiring Stock code	Lots on ho	ld	II Period clos		×
	Date	: Туре	Warehouse	Trn type	: Quantity	: Transaction value	Unit cos	Î
4 - Made-in	29/03/2011	Inv	E	Chg	0.00	0.00	3,038.24 🔺	
Part category	08/04/2013	Inv	E	Chg	0.00	0.00	2,992.71	
AB - Alan Brown	09/04/2013	Inv	E	Chg	0.00	0.00	3,042.91	
Planner	08/11/2013	Inv	E	Rec	100,000.00	304,291,160.00	3,042.91	10 11 12
	07/08/2014	Inv	E	Rec	1.00	3,042.91	3,042.91	
Pricing	16/02/2015	Sale	E	Inv	1.00	3,042.91	3,042.91	The second se
4905.000	22/04/2015	Inv	E	Chg	100,000.00	-303,781,160.00	5.10	
	20/10/2015	Inv	E	Rec	1.00	5.10	5.10	
Selling price	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
Stock level	03/05/2017	Inv	E	Rec	12.00	61.20	5.10	
_	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
L01,317.000 EA On hand quantity	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
Notes	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	10 11 12
-	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	▼
			4,905.00000 Selling price	EA Price b	pasis	view data		Ť

Here is the Movements listview shown as a popup window:

And the same application, but with Movements and History Listviews shown within the page:

E SYSPRO'Avanti Home > Inventory Que	ery								9	Phil
ock code B100 Q										•
		-	and the second			1100 A		and the second	100	-
ots expiring Lots on hold	Movements									
ots expiring Lots on hold	Date	:	Туре :	Warehouse	: Tr	n type :	Quantity :	Transactio	n value	
	29/03/2011		Inv	E	Ch		0.00	0.00		
	08/04/2013		Inv	E	Ch	-	0.00	0.00		
0 0	09/04/2013		Inv	E	Ch	-	0.00	0.00		
Within 30 days Stock code	08/11/2013		Inv	E	Re	ec.	100,000.00	304,291,16	0.00	
ctive jobs	07/08/2014		Inv	E	Re	ic.	1.00	3,042.91		
	16/02/2015		Sale	E	Inv	V	1.00	3,042.91		
	22/04/2015		Inv	E	Ch	g	100,000.00	-303,781,16	0.00	
	20/10/2015		Inv	E	Re	c	1.00	5.10		
9	03/05/2017		Inv	E	Re	c	1.00	5.10		
Stock code	03/05/2017		Inv	E	Re	c	1.00	5.10		
Purchasing information	03/05/2017		Inv	E	Re	c	12.00	61.20		
-	03/05/2017		Inv	E	Re	c	1.00	5.10		
00001 - 19 2 cycles Lead time Dock to	03/05/2017		Inv	E	Re	ic.	1.00	5.10		-
pplier	4		*		- 11				1	
E Units of measure	History	MTD s	old/issued	Prev 1 sold	/issued	d E F	Prev 2 sold/issue		Prev 3 sold	
	Combined	1,601.0	00	0.00		0	0 <mark>.00</mark>		0.00	-
	E	1.00		0.00		c	0.00		0.00	
	FG	1,600.0	00	0.00		0	0.00		0.00	
	N	0.00		0.00		c	0.00		0.00	
	S	0.00		0.00		(0.00		0.00	
	TEST	0.00		0.00		(0.00		0.00	

USING CARDS IN AVANTI

Cards are pre-built discrete functional components.

A card is a self-contained HTML5 page whose data is derived typically (but not exclusively) from a business object.

A card may run as a separate entity in its own window or can be embedded in a view.

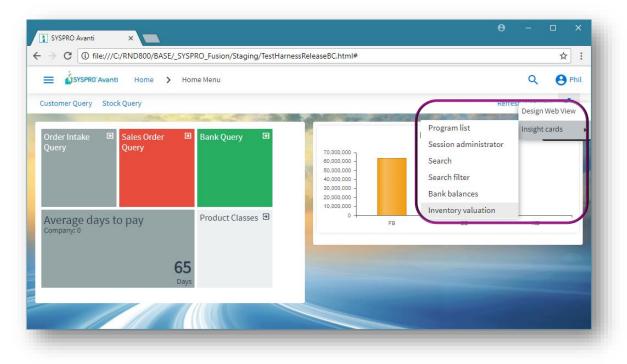
A card may require a 'key value' (such as a Customer or Stock code key) to execute, whereas other cards require no such key – the latter are known as 'Insight cards' (an example might be 'Bank balances', or 'Sales order commitments').

While Avanti ships with a set of pre-built cards, it is relatively easy to construct new cards for any additional required functionality.

To add a card to any view, you can use the Visual Designer.

SHOWING INSIGHT CARDS

To show an Insight card as a popup window, click on Insight Cards from the Settings icon while on the **HOME Page**, and select the required item:



The Card is shown in a popup window:

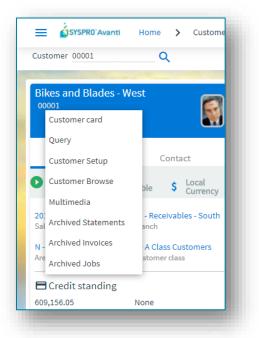
O file:///C:/RND800/BASE/_SYSPRO_Fusion/Staging/TestHarnessReleaseBC.html SYSPRO Avanti Home > Home Menu	#		☆
SYSPRO'Avanti Home > Home Menu			
		Q	e Phi
ustomer Query Stock Query		Refresh WebVie	w 🌣
and the second s			
Order Intake El Sales Inventory valuation	– 🗆 🗙 Ices		
Query Query			
Inventory Valuation			
	E SP		
	FG TEST FS N		
Average days to pay	R R R R B	NB	
company: 0	SA SA		

The card can be positioned anywhere within the browser, and can be minimized or maximized within the browser. Avanti will remember any cards shown like this, and will show them again next time you login.

SHOWING 'KEY' CARDS

Cards that are associated with key fields can be embedded in a view or can be shown in popup windows. Such cards are automatically refreshed whenever the key value in a toolbar or form field is changed.

To show a key card as a popup window, you select from the SmartLink context menu. This is the same context menu that is available in the SYSPRO Window client version.



The Customer card is now shown as a popup window:

			/TestHarnessReleaseBC.html#						
E SYSP	RO'Avanti Home	> Customer Query					Q	\rm Phi	L
ustomer 000	02 Q								
					Σ Sales and	l profit		1200	
31kes and E 00002	Blades - North	Average	e days to Percentage of						
	ustomer card	– C	debtors		175,452.00 This month	648,572 This year	9,459,72 Previous year		
In Active	Bikes and Blades	s - North	49 _{Days} 7.29%	5	66,666.96 Profit this month	244,086 Profit this year	3,515,52 Profit previous year		
00 - Tony I	Info	Contact	ice metrics	~	🖻 Month to	date			
alesperson I - Norther rea	🕨 Active 😑	Credit exceeded \$ Local Currency		~	438,612.00 Invoices	0.00 Credit notes	0.00 Debit not	tes	
Credit	100 - Tony Dean Salesperson	10 - Receivables - North Branch	This is a master account		0.00 Payments	0.00 Discounts	0.00 Adjustme	en	
. ,079,080.7 Jutstanding	N - Northern Region Area	A - A Class Customers Customer class			Sales his	tory			
0 Days - 2.	🗖 Credit standin	σ			4.000.000 -				
nvoice term	1,079,080.72	None			3,500,000 -	- I.			
.00 Gredit limit	Outstanding balance	Credit method			3,000,000 - 2,500,000 -				
active time	30 Days - 2.5%				2,000,000 -				
🗖 Dates	Invoice terms	Credit status			1,500,000 -				
byrs, 7months		0 -		days	500.000 -	II III.	hu		
Account added	Last sale L	ast payment View data	Current 60 days 120	cays	- 0	ν ~ ~ ~ <u>~</u> Ω	2 2 2 2	5 8	

USING GRIDS IN AVANTI

A grid in Avanti has some common characteristics:

- Built-in functions (output as PDF document, output to Excel, and Filtering) are shown in the grid toolbar on the right-hand side.
- Buttons that are specific to the application are shown on the left-hand side.
- If there are some actions available for an editable grid, then typically they are shown as buttons to the left of each row.

In the example below, clicking on the **Edit** icon shows a context menu:

\rightarrow C $($ File	fil	e:///C:/RND80	0/BA	SE/_SYSPR	O_F	usion/Staging/Te	stHa	arnessReleaseBC.html#	7	* 0	:
SYSPR0'Avanti	♠	> Back O	rder	Release				۹	Ļ	θ	
State State Street		130	-	C. Carlos	100	1000	24			P. Marcal	
⇒ 🟥								🖭 보 Filter			
Selected	÷	Sales order	:	Line	:	Stock code	:	Backorder quantity	- 1	Uom	
Change		<u>900814</u>		1		<u>BSO100</u>		350.000		EA	
Apply Release Quanti	ty	00814		2		BS0100		420.000		EA	
						BSO100				EA	

The following example shows a **Delete** icon that, when selected, will remove the row:

	oly Undistributed								
1	Ledger code	:	Description	:	Transaction date	:	Reference	:	Debi
t d		2			04/12/2018				

The grid list columns sequence in Avanti is initially provided from the equivalent list view from within the SYSPRO program. Thereafter, any changes to the grid when running in Avanti (such as moving columns around, removing columns, sorting or grouping) are automatically saved on the application server in ...\base\settings\AVANTI\ as:

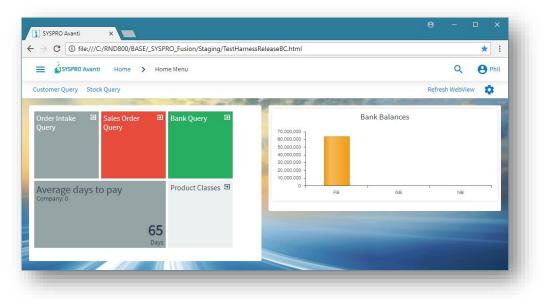
List_operator_gridname_AVANTI.XML.

Note: Changes to grid layouts are not saved if you are logged into Avanti using a role.

USING BUSINESS INSIGHTS AND TILES IN AVANTI

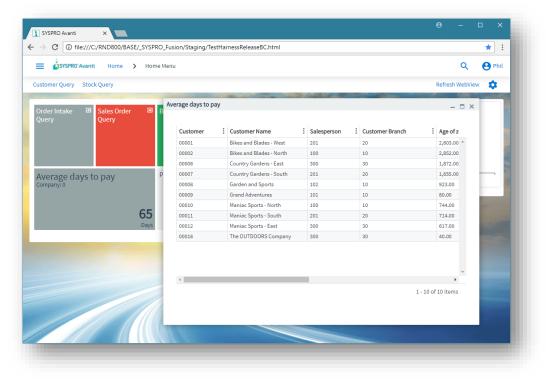
Business insights are discrete views of KPI data and are displayed within Tiles. These tiles can be added to any view using the Visual Designer. Additionally, a tile can represent a program that can be launched.

If we look at the view shown below, which is the **HOME Page** for Avanti, there are 3 Program Tiles, and two Business Insight tiles.



Clicking on **Order Intake Query**, for example, will launch that application.

Clicking on **Average days to pay** (a Business Insight tile) will show the detail behind that KPI:



UNDERSTANDING WORKSPACES

A workspace is a way of grouping tasks or processes in a meaningful way for an individual.

Another way of looking at a Workspace is that it is a Web View designed to be surfaced when you are in the **HOME Menu**.

Note: Workspaces are only available when you are in the **HOME Menu** in Avanti.

If you are in a Role, then typically the Workspace is designed by the Administrator (<u>Designing</u> <u>Workspaces by Role</u>).

If you are not in a role, then you can design your own Workspaces (<u>Designing Workspaces in</u> <u>Avanti</u>).

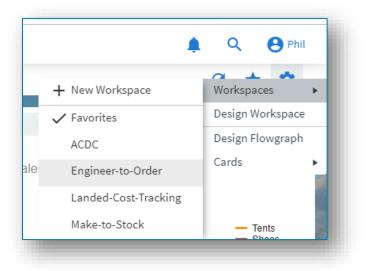
DESIGNING WORKSPACES IN AVANTI

Workspaces for a non-role user are designed from within Avanti.

You can have an unlimited number of workspaces.

Click on the **Settings** icon when in the **HOME Menu** and select **Workspaces**. A list of available workspaces is displayed.

Note: You will always have a **Favorites** workspace and this will be selected by default when you log into Avanti.



To add a new workspace, select the **New Workspace** option.

Add V	Vorkspace		
	Enter workspace nan	ne:	
	my new workspace		
	The name must not following character		
	ОК	Cancel	

The workspace will be saved as a filename as:

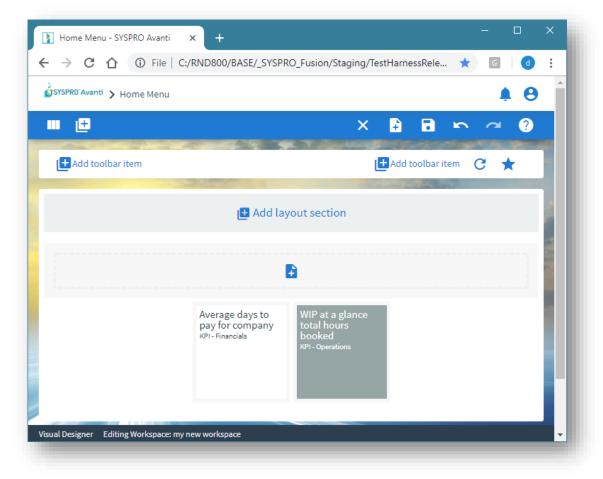
...\settings\UX_operator_IMPMENLZworkspaceName.JSON.

Note: Because this is a filename, you cannot include invalid characters such as \ or /.

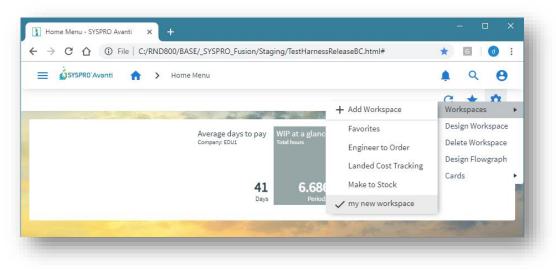
Click on **OK** and the Visual Designer will load, indicating the workspace you are editing in the status bar.

Now add the elements you wish to show in your workspace.

In the following example, two TILES have been added:



After saving the Workspace, it will be refreshed in the **HOME Menu**:



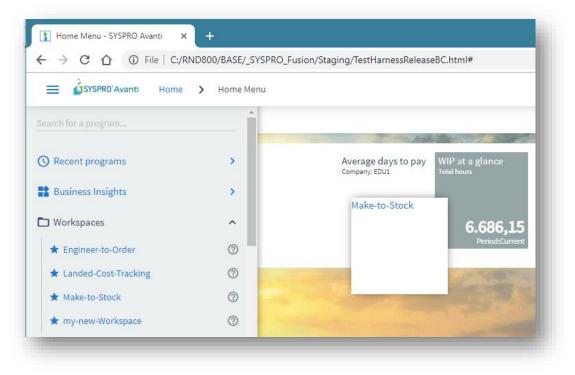
To change the Workspace, click on **Design Workspace**.

To delete the Workspace, click on **Delete Workspace**.

Note: You cannot delete your **Favorites** workspace as this is your primary view in the **HOME Menu**.

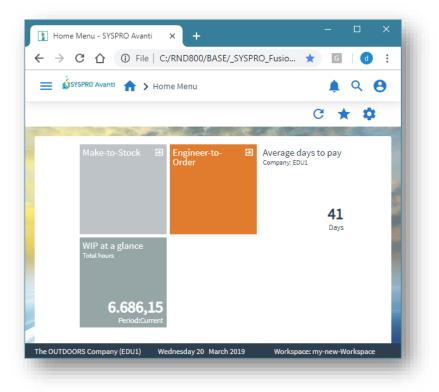
You can switch Workspaces in either of the following manners:

- Click on the Settings icon and select from the Workspaces shown,
- Or if you have a **Tile** section in your Workspace, you can drag a Workspace item from the Hamburger menu onto the Tile section:



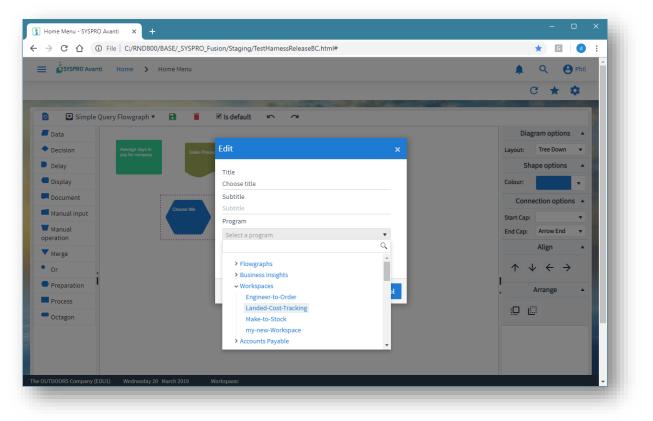


Clicking on the workspace tile will switch to the nominated workspace:



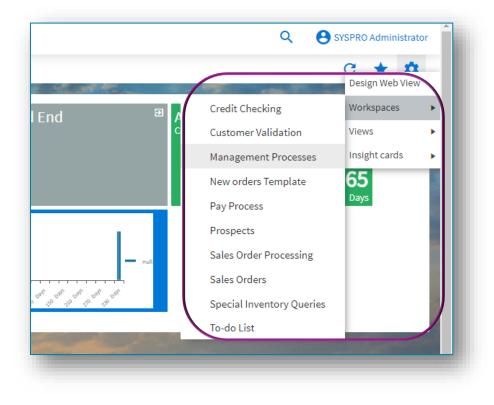
You can also switch to a different Workspace using the Flowgraph.

Call up the **Flowgraph Designer**, add the design element, click on the **EDIT** button and select the Workspace from the **Workspaces** list:



USING WORKSPACES BY ROLE IN AVANTI

Workspaces by role are only available when you are in the **HOME Menu**, and are displayed beneath the **Settings** icon (sorted by description):



A workspace may contain anything that can be designed in the Visual Designer:

- Business insights
- Program Tiles
- Charts
- Flowgraphs
- Cards
- Grids
- Forms
- Any Customized Panes associated with the role itself.

You can switch between workspaces at any time when you are at the **HOME Menu** in Avanti.

The name of your current workspace will be shown in the status bar of Avanti.

DESIGNING WORKSPACES BY ROLE

Workspaces by role are designed from within SYSPRO.

You can have an unlimited number of workspaces for each role.

Within SYSPRO, from the **Administration** tab of the Ribbon Bar, select **Design Workspaces** (this button will be disabled unless the option **Role layout design** against the operator is checked).

This will show all the defined workspaces across all roles:

🛃 Design Workspaces by Roles		×
™ <u>N</u> ew <mark>⊒</mark> Change ҲDelete		÷. •
Role	Description	
100 - Account Manager		
	Credit Checking	
	Customer Validation	
	Management Processes	
	Pay Process	
	Prospects	
	Sales Order Processing	
	Special Inventory Queries	
	To-do List	

Click on **New** to create a new workspace.

Select the role for which you wish to define a workspace, and enter a description:

Workspace Maintenance					
Select role:	100 - Account Manager 🗸 🗸 🗸				
Description:	Special KPI				
Select template:	DebtorController \vee Preview				
Start Designing	Workspace Cancel				
Start Designing	Workspace Cancel				

Optionally, you can select a pre-defined template to use as the basis for your workspace.

Click on Start Designing Workspace.

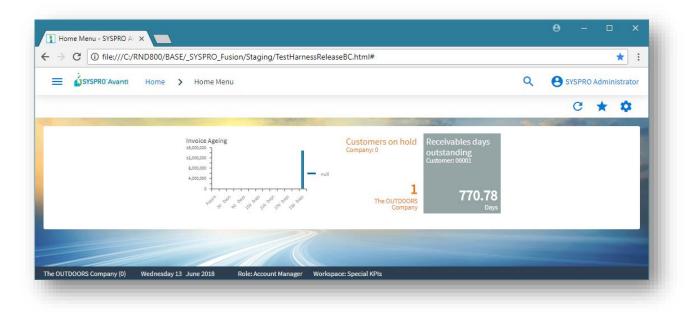
The Visual Designer is launched:

Visual Designer: Workspace: UX_WSP_Special KPIs.JS	ON (Role: 100)				×
lose Save <u>N</u> ew <u>D</u> elete View Design <u>T</u> emplate	<u>E</u> dit Macro				¢ .
🚥 🗄 🔒		5	~	?	^
L Add toolbar item	L Add tool	oar item	G	*	
	■ Add layout section				
	•				
	Customers on hold for company Metric - Customer ManagementReceivables days outstanding for customer KPI - Customer Management				
					~

In this example, three Business Insights have been added to this workspace.

Click on **Save** to save the workspace.

From within Avanti, selecting this workspace shows the view below. The Role and Workspace names are shown in the status bar.



TECHNICAL INFORMATION REGARDING WORKSPACES

Workspaces by Role are held as JSON files.

Role Workspaces

SYSPRO template workspaces for roles are located in the following folder:

...\base\samples

Prefix:

UX_WSP

An example of this:

```
UX_WSP_InventoryController.JSON
```

Administrator designed Workspaces

Workspaces designed by an Administrator are located in the following folder:

```
...\settings\Role_xxx
```

Prefix:

UX_WSP and the description.

An example of this:

UX_WSP_Special KPIs.JSON.

Non-role user Workspaces

Workspaces for non-role users are held as JSON file in the following folder:

...\settings

An example of this:

...\asettings\UX_ADMIN_IMPMENLZMake to Orderd.JSON

PRINTING DOCUMENTS IN AVANTI

To print a document in Avanti requires the **Reporting Configuration** option to be enabled as **Server-side reporting**.

This is implemented in the **Reporting** tab of the **System Setup** program:

7								*
Save and Exit	Configure e	net License.	Edit Clie	nt Configu	ration			¢. •
Reporting								ч×
Rules Engine/H	larmony	Artificial Inte	lligence	Email/	SMTP settings	Passv	vord defin	ition
Reporting		Espresso	E.N	Net Service	Details	Office	Integratio	n
General	Login	Dialog	Data	base	Date Form	at	Folde	rs
Reporting								^
				 Server- 	-side reporting	using S	QL	
Reporting o	configuration		O Client-	side reporting	using SC	ΣL		
	-			OClient-	side reporting	using XN	и Ј	
Database con	nnection							
SQL Server	name			(local)				
Connection	string							
Database aut	hentication							
				SQL au	thentication			
Reporting a	authenticatio	n		Windo	ws authenticati	on		
Login				sa				
Password				*****	*****			***

PREREQUISITES

You may have to install the SRS server-side reporting system.

Without this, you cannot print documents or any SRS reports from within Avanti.

PRINTING DOCUMENTS

Clicking on a **PRINT** button to produce an online document will cause the document to be produced as a PDF document and will be downloaded to the browser.

As an example, the following screenshot shows the **END ORDER** screen for **Order Entry**:

\rightarrow C (i) file:///C:/RN	D800/BASE/_SYSPRO_Fusio	n/Staging/TestHarnes	sReleaseBC.html#				*
SYSPRO'Avanti	Home > Sales Order E	ntry				Q	e Phil
💥 Order Entry Custome	r 0000001 Q	Type Billing	· ·	Aaintain Order O	rder 000987	Q	
) III	Complete Order	Cancel Order	Options 🗸 🦸	Preferences	\$
					0	efresh totals Expan	nd card 🗸
0000987 0000001 Sales on	End Order			_	\$ 100.0		
Customer	😫 Continue Order		📜 En	d Order 📑 🌣	Invoice	total	
Customer purchase order * P/O # 123	Document format 0 - Invoice			Ţ	ne 殿	Add freight line	
Order date 11-09-2018	Define Format						
Ship date 11-09-2018	Document to print Invoice						
Order branch	Q		p.			🛃 Filter	
10	v	Drag a column hea	ader and drop it he	re to group by that colum	n		
Receivables - North		Stock co	ode : Line	: Description	Warehouse	Order qty	Uom
Salesperson							
	Q	/ {Miscella	ineous} 1				<u> </u>

After clicking on the **PRINT** button, the document will be created and shown as a PDF in the browser download area:

Sales Order Er	ntry - SYSPR 🗙	\					θ	-		×
\leftrightarrow \Rightarrow C (i)	file:///C:/RND800/8	BASE/_SYSPRO_Fu	sion/Stagin	g/TestHarnessReleas	eBC.html#				*] :
	RO'Avanti 🔒	> Sales Order	Intry					Q	Θ	Î
낮 Order Entry		001	Ҳ туре	Order	-					
Order 000988	Q									
		Complete C	order 🖀	Cancel Order	Options 👻	🗗 Prefe	erences	?	\$	
• 0000001	End Order	Sales Order E	ntry		×					
Customer	💥 Continue O	- Dovo	wich to ro	print this document?	,		. E	nd Orde	e 🖶	
Customer purc	Document forma	(i) ^{boyo}		unit unit document.						
Order date Ship date	Document to prin	Yes		No						
Order branch	bocument to prin	_		Delivery not	te					
Salesperson				O Order ackno O SCT transfe	-					
AR invoice tern	Format description			Invoice						
	Posting period			02/2016						
Ordered By:	Print document if f	faxing								
🔁 Delivery not	te 0000pdf \land							S	now all) ×



Click on the PDF button in the browser to show the PDF document, allowing you to print the document:

ery note 000000	00000988. <u>pdf</u>		1/1		o 🛓	a
,					· -	Print
T L -						PIIN
Outd	Aro			The O	UTDOORS Company	
Oula	COLZ				Outdoors	
	ompany	/		Reg: 1: Tax:	978/035534/04	
					Delivery Note	
					000988	
	Develde Dilees			Commun	: 0000001	
Shipping address	: Bayside Bikes 3 Beach Road Bayside North			Customer	Bayaide Bikes P O Box 8	
	Seattle WA				Beyalde North Seattle	
	USA 98101-				WA USA 96111-	
				Telephone	: 206-555-4562	
Shipping Instructions	: Road			Fax	: 206-555-4587	::
Sales order	Invoice date	Order date	Ship date	Salesperson	Customer purchase order no	
000988		11/09/18	11/09/18	Tony Dean	p/o #1	(+)
Delivery terms :						\sim
Stock code	Deecrip	tion	Warehouse	Ship quant	ity Unit price Gross am	<u>•</u> –)

SWITCHING ROLES IN AVANTI

If you are logged into Avanti using a role, and your operator is associated with more than one role, then you may switch to any of the other roles while you are in the main Avanti menu.

As an example, the screen shot below shows that Operator ADMIN is linked to three roles:

🛃 Operator Maintenance				<
<u>F</u> ile <u>E</u> dit <u>C</u> ontact P <u>a</u> ssw	vord			
* 🗅 Ne <u>w</u> 🗙 🗈 🖯 Operat	or: ADMIN	▼ Q Notepad Printers		
Con <u>t</u> act			ő	÷
Operator Details				џ
Personal				^
Operator		ADMIN		
Operator name		SYSPRO Administrator		
Network user name		ADMIN		
Group Adm	ninistrator Group	ADMIN	Q	L
Subgroup		Assign		
Location				¥
Roles			ą.	×
Access Roles ×				
* Add Roles E Organogram	l		ô	÷
Role	Primary role			^
Account Manager	V			
ARROW PURCHASING				
Assets Manager				
Assets Buyer				
Status - Changing operator: A	D. U.			÷

In Avanti, you click on the **SETTINGS** icon in the **HOME Menu** to switch to another role:

		ໟ – ◻ ×
		☆ :
	۹ 🔒 ۵	YSPRO Administrator
(Design Web View
	Account Manager	Switch roles
AR Peric	ARROW PURCHASING	Workspaces
	Assets Manager	Views 🕨
		Insight cards 🔹 🕨

When you switch roles, the security settings and Web Views defined for the new role will be applied.

USING FLOWGRAPHS IN AVANTI

Flowgraphs in Avanti contain shapes that can be linked together visually.

A shape can be optionally defined to action any of the following:

- Run an Avanti program.
- Execute a business insight.
- Switch to an alternative Workspace.
- Switch to a different Flowgraph.

Note: Currently, Flowgraphs are created and viewed only at the operator level.

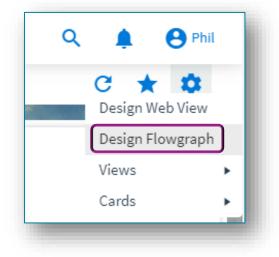
PREREQUISITES

To design a Flowgraph you must enable the operator security activity **Flow Graph – Allowed to design flow graphs** in the **Operator Maintenance** program:

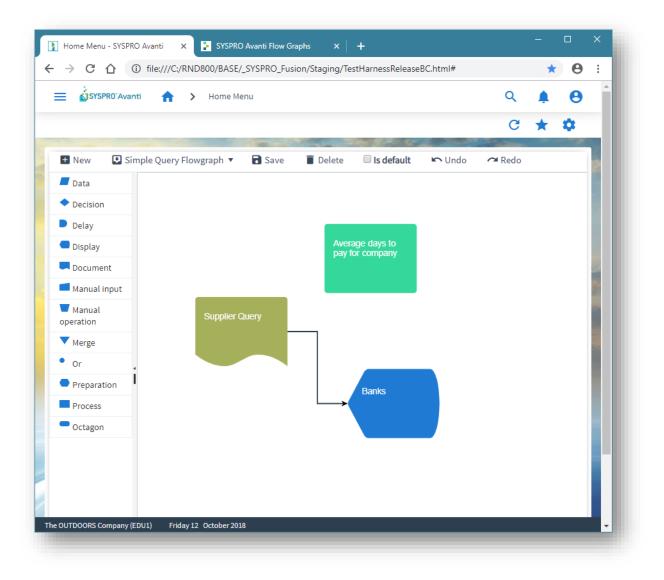
🛃 Ac	tivities				×
<u>F</u> ile					
Accept	and Close Scancel				
Allow	Activity description	Module 🔺	e.net sp	ecific ad	tivity ^
✓	Allowed to upload files to the server	Customization			_
	Maintain data in import programs	Customization			
	Allowed to import from client	Customization			
	Enterprise Search - Allowed to configure search settings	Customization			
	Flow Graph - Allowed to design flow graphs	Customization			
I ▲ Mo	dule: Electronic Funds Transfer				
	EFT Payment delete	Electronic Funds Tra			
A Mo	dule: Espresso				
	ESP Allow maintenance of Espresso menu	Espresso			
	ltems:350				~

DESIGNING A FLOWGRAPH

In Avanti, click on the SETTINGS icon in the HOME Menu to design a Flowgraph:

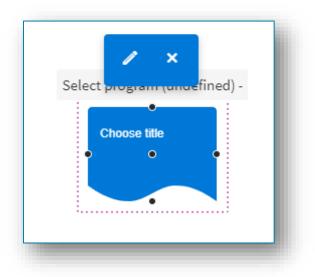


The Flowgraph Designer is displayed:

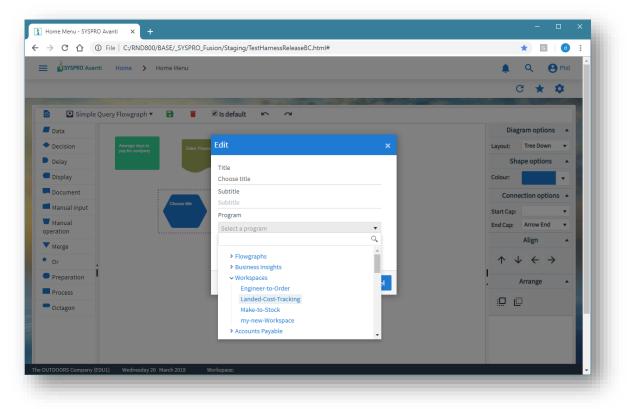




Drag a shape onto the blank canvas area:



Click the **EDIT** button to enter a shape title and select to run a program, a Business Insight, another Flowgraph or another Workspace:

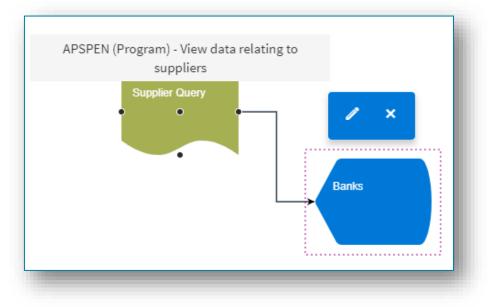


The list of available programs is identical in structure to that shown in the main menu.

You can run any Avanti program, add a business insight or select another Flowgraph or Workspace.

Selecting a program will automatically update the **Title** and **Subtitle** (which is shown as a tooltip).

You can visually link shapes by clicking on a connector button and dragging the arrow to another shape:



Click on the **SAVE** button when you are finished and enter a name for the Flowgraph:

Save new diagram	
Please enter the name for t	he new Flow Graph to save
Simple Query Flowgraph	
ок	Cancel

You can optionally make your current Flowgraph the default to be shown in the viewer – just check the option is **Default**.

EXITING THE FLOWGRAPH DESIGNER

To exit the Flowgraph Designer, click on the **HOME** button.

VIEWING A FLOWGRAPH

To view a Flowgraph:

- 1. Add the Flowgraph Viewer 'card' to any Web View using the **Visual Designer**.
- 2. Add a layout section to your Web View.
- 3. Select the **Flowgraph Viewer** card.

Configure new layout sec	onfigure new layout section							
1 What would you like to	o add?							
Card								
2 Select card type:								
O Bank Balances	C Flowgraph viewer							
O Search Filter	S Flowgraph viewer							
O Flowgraph designer	O Inventory Valuation							
O Interactive Map	O Plugins							
O Program List	⊖ Search							
O Session Administ	⊖ SRSMenu							
() Weather	○ Job tracking							

In the example below, the viewer has been added to the **HOME Menu**. You select the Flowgraph you would like to view from the drop-down menu in the viewer.

\rightarrow G (i)	IIIe:///C:/KINDOUU/BASE	/_SYSPRO_Fusion/Staging/Te	striarnesskeleasebt.r	111111111111111111111111111111111111111				* 0
SYSPRO'A	vanti Home > H	Home Menu						Q 🌲 😫 Phil
stomer Query	Inventory Query Amazi	ng view						C ★ 🌣
					13-18-1			1200
/IP at a glance	Avorago dave to	Pank Quany - 31	-				Simple Query Flowgraph 🔻	
ibor cost Av	verage days to pay					- 0	×	
						L Filter	A	
381284	† Branch ×				_			
Period:	Customer	Customer Name	Salesperson	: Customer Branch	: A	Age of zero bal invoices{N		
equirements	Branch: 10					<u>*</u>		,
alculation	0000001	Bayside Bikes	100	<u>10</u>	7	'5		
	0000002	Bikes & Blades - North	<u>100</u>	<u>10</u>	1	.53		Average days to pay for company
	8000000	Garden and Sports	102	10	6	6		pay for company
	0000010	Maniac Sports - North	<u>100</u>	<u>10</u>	1	.00		
	Branch: 20							
djustments	0000011	Maniac Sports - South	201	<u>20</u>	5	1	Supplier Query	
	Branch: 30							7
	0000012	Maniac Sports - East	300	<u>30</u>	5	1		
	Branch: 70							
	0000070	Highway Leisure	700	<u>70</u>				Banks
1.0	0000071	CC Cycles	<u>700</u>	<u>70</u>				
L Query	0000071				4	96.00		
						1 - 8 of 8 items	*	
			MTD payments	-30,012.00	-1,608,	426.00		

Click on a shape to run the associated Avanti program.

Alternatively, if the shape has been defined for a Business Insight, then clicking on it will show the Insight detail.

USING THE VISUAL DESIGNER

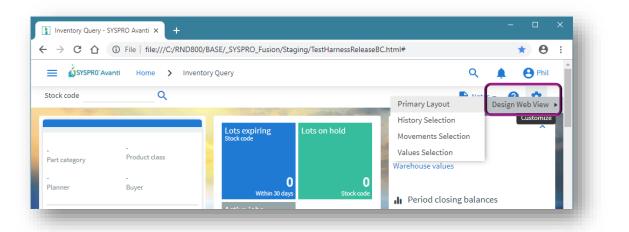
USING THE VISUAL DESIGNER IN AVANTI

To modify any web view in Avanti you use the Visual Designer.

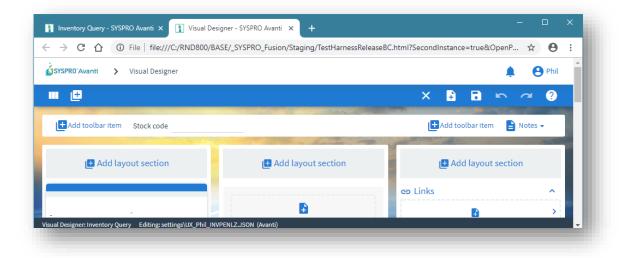
Note: Any web view customized using the Visual Designer in Avanti will only appear in Avanti.

If you wish to design a web view for use in the SYSPRO Client, please read the section <u>Using the Visual Designer in SYSPRO</u>.

For example, to add or modify a Business Insight shown in a Tile, click on **Design Web View** from the **SETTINGS** icon:

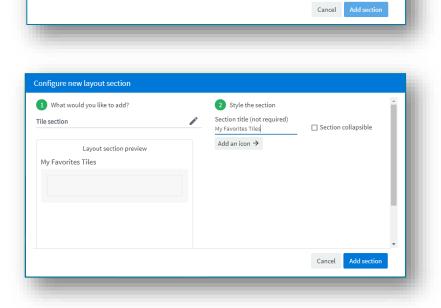


Except for when editing the **HOME Page**, the Visual Designer will be shown in a new instance of Avanti in a separate browser TAB:



Now click on the **Add Layout Section** to add another 'Tile' section:

Select **TILE SECTION**, optionally style the section, and click **Add Section**:



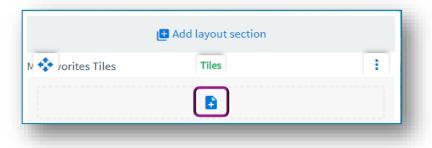
Configure new layout section

1 What would you like to add?

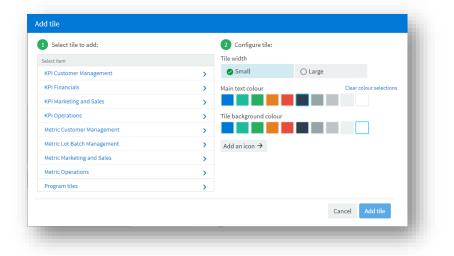
Choose a layout section

Layout section Tile section Card Form Grid list Tree list

Now click on the **ADD** button to add a tile:



And then select the KPI or program tile to be added:



DESIGNING WEB VIEWS FOR A ROLE IN AVANTI

You can design a Web View for any role when running in Avanti.

Assuming the user has the operator security option ROLE LAYOUT DESIGN switched on, then when you click on the SETTINGS icon in any Avanti screen, the option **Design Web View by Role** will be shown.

→ C û û	File file:///C:/RND	300/BASE/_SYSPRO_Fusio	n/Staging/TestHarnessReleaseBC.html#	* 0 :
SYSPRO'Avant	i Home > Cu	stomer Query	Account Manager	🛕 🌲 🔍 😁 Phil
ustomer	Q		ARROW PURCHASING	🕒 Notes 🗸 🙆 📩
		1000	Assets Buyer	Design Web View Design Web View by Role
		Average da	Assets Manager	Design web view by Role 🕨
Info	Contact	pay Branch:	Assistant Controller	ït
			Bookkeeper	0 0.00
alesperson	Branch		Building Maintenance Engineer	s year Previous year
rea	- Customer class	Receivable	Chief Executive Officer	fit this year Profit previous vear
100	customer class	outstandin	Chief Financial Officer (CFO)	year
Credit standing			Chief Technical Officer	
)utstanding balance	Credit method		Consumables Buyer	0 0.00 dit notes Debit notes
/C:/RND800/BASE/ SYSP	RO_Fusion/Staging/TestHa	arnessReleaseBC.html#	Consumables Purchasing Manager	• 0 0.00

Select this and a list of all roles will be shown.

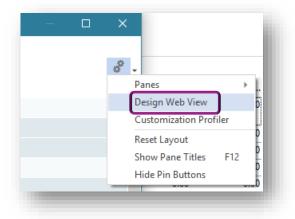
Click on the required role name and the Visual Designer will be loaded in a new browser TAB to design the Web View for the role.

Considerations:

- 1. Any Customized Panes applicable for the current application for the selected role will not be surfaced in the Visual Designer, as these will only be available when you are designing by role while in SYSPRO.
- You will not be able to design a Web View by role for the main menu in Avanti. Instead, you will need to select the **DESIGN UI LAYOUTS** option from SYSPRO's ribbon bar, select the Role, select **Application Builder**, and then **Design Role View**.

USING THE VISUAL DESIGNER IN SYSPRO

To design a web view in SYSPRO, click on the Settings icon and select **Design Web View**:



The Visual Designer in SYSPRO is used to create web views for use in SYSPRO as well as for Avanti. Therefore, as the Visual Designer loads in SYSPRO, the following checks take place:

- 1. If an Avanti Web View pre-exists it will be automatically loaded for editing.
- 2. If a SYSPRO Client Web View pre-exists it will be automatically loaded for editing.
- 3. If both Avanti and SYSPRO Client web views pre-exist then a message box will appear asking which web view is to be loaded for editing:

Web View Version	×
A Web View for both Avanti and SYSPRO Client exist program. Please select which Web View you would like to edit	
→ Avanti	
\rightarrow SYSPRO Client	

4. If neither Avanti nor a SYSPRO Client web view pre-exists then a message box will appear asking which type of Web View you would like to create:

Web View Version	×
No Web View exists for this program. Please select which type of Web View you would	like to create.
→ Avanti	

USING THE VISUAL DESIGNER IN CLIENT/SERVER MODE

If you are in client/server mode in SYSPRO, you will not be able to create or edit a Web View for Avanti, unless you are designing by Role.

The reason for this is that all customization files for non-role users are saved on the client machine. Avanti cannot access such customization files since Avanti can only access files on the SYSPRO server.

You can, however, use the Visual Designer in Avanti to create or design Web Views for nonrole users, since this does not rely on customization files residing on a client machine.

If you are designing for a role, then you can create and design a Web View for Avanti even when running in client/server mode. This is because all customization files for roles are saved on the application server, to which Avanti has access.

CREATING A NEW WEB VIEW

From within the Visual Designer on the toolbar, select **New** to create a Web View for either Avanti or for the SYSPRO Client:

Create New Web View	×
Please select which type of Web View you would like to crea	te.
 Avanti SYSPRO Client 	
Use application template OK Cancel	

If a standard template for the application exists then you can check the **Use application template** to apply the template as your starting point for your Web View.

SAVE AS A DIFFERENT WEB VIEW

You can select to save the current Web View as a different type of Web View.

In the Visual Designer, click on **Save As** to select to save the Web View as a different type.



For example, if you are editing an Avanti Web View you can save it as a SYSPRO Client Web View, and vice versa.

Save As	×
Please select which type of Web View you would like to sa	ive.
Avanti	
○ SYSPRO Client	
OK Canc	el

TECHNICAL INFORMATION REGARDING WEB VIEWS

Web Views are saved as JSON files, named by the program.

Operator level

When designing at the operator level, web views are saved in the following folder:

...\settings

An example of this for a web view for Avanti:

UX_operator_ARSPENLZ.JSON

An example of this for a web view for SYSPRO Client:

UX_operator_ARSPENLZ_SYSPRO.JSON

Role level

When designing at the ROLE level, web views are saved in the following folder:

...\settings\Role_xxx

An example of this for a web view for Avanti:

ARSPENLZ.JSON

An example of this for a web view for SYSPRO Client:

ARSPENLZ_SYSPRO.JSON

Workspaces by Roles will be assumed to be for Avanti only, as there is no mechanism for surfacing such web views in SYSPRO at present.

SHOWING CUSTOMIZED PANES IN AVANTI

Some types of Customized Panes in SYSPRO can be shown in Avanti.

The following table indicates which types of Customized Panes can be added to a Web View using the Visual Designer:

Type of Customized Pane	Can be added to a Web View	WILL EXECUTE WHEN RUNNING IN AVANTI
Graph	Yes	Yes
Listview	Yes	Yes
Form	Yes	Yes
.NET User Control	No	Depending on option (see below)
SRS Report	No All SRS reports can be shown in Avanti from the main menu.	No
PDF Viewer	No	No
Search Window	No	No
Executive Dashboard	No	No
RTF Notepad	Yes	Yes

HOW TO ADD A CUSTOMIZED PANE TO A WEB VIEW TO SHOW IN AVANTI

To explain how to add a Customized Pane to a Web View, we will use the standard WIP Job Variance list view that's available as a Customized Pane template, and we will add this to SYSPRO's main menu.

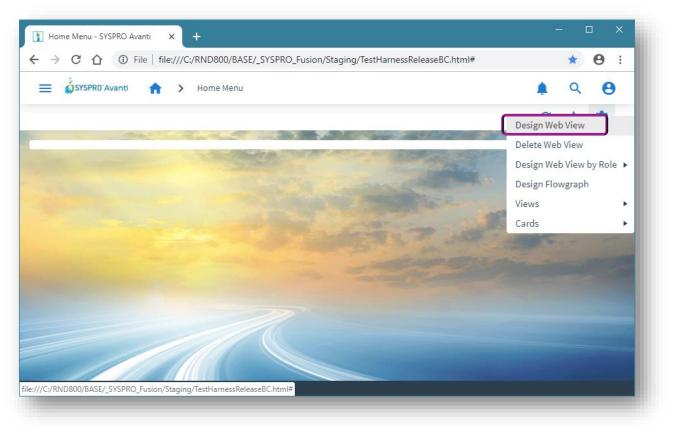
Work in Progre	ss Job variance		×
Show completed	l jobs Job number		
Job	Description	Cost Variance	% Variance 🖍
00000137	Bicycle	466,041.67	51.66
00000140	Handle Bar Assembly	0.00	0.00
00000141	Radially Spoked Front Wheel	0.02	0.00
00000142	Radially Spoked Rear Wheel	0.02	0.00
00000146	Racing Bicycle	-91.65	-0.06
00000147	Racing Bicycle	74.35	0.24
00000148	Racing Bicycle	-191.00	-0.54
00000151	Racing Bicycle	-191.00	-1.78
00000149	Racing Bicycle	0.00	0.00
00000150	Racing Bicycle	0.00	0.00
00000152	Bicycle Brake Assembly	0.00	0.00
00000154	Racing Handle Bar Assembly	70,714.00	99.68
00000155	Racing Spoked Front Wheel	69,619.10	100.00
00000156	Racing Spoked Rear Wheel	65,919.10	100.00

In addition, two toolbar captions have been added to this pane – a **Show completed jobs** checkbox and a **Job number** field.

Here are the Pane properties for this Customized Pane:

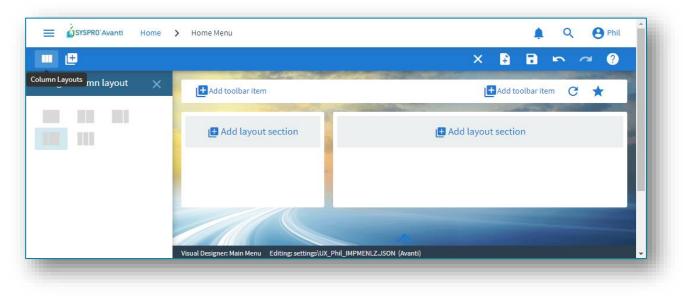
Pa	ne Properties	×
	Window title	Work in Progress Job Variance
	Object type	E Listview
	VBScript file name	settings\Phil_VBS_IMPMEN09
	Initial docking position	Left
Þ	Form attributes	
Þ	Pane Caption	
Þ	Refresh details	
4	Toolbar control 1	
	Caption	Show completed jobs
	lcon	Icon 🗸
	Control type	Checkbox 🔹
4	Toolbar control 2	
	Caption	Job number
	lcon	lcon
	Control type	Edit control

Now launch Avanti, and select to **Design Web View** from the **HOME Menu**:



Select a two-column layout:

- The first column being small (to hold the Customized Pane toolbar buttons)
- The second column being larger (to hold the data grid)



Select to add a Layout Section to the larger layout section.



Select **Grid List**, followed by the **Work in Progress Job Variance** option and click on **Add Section**:

rid list					on title (no ob Variance		d)	Section collapsible
Select grid list:					an icon →	_		
○ AR at a Glance	🕑 Work in	I Progress J	ob Variance	Bord	er style			
				E	÷	#		
	out section p	review		Size				
WIP Job Variance				s	М	L		
Column Column heWork im Pr								
								Cancel Add section

Click on **Save layout**, and Avanti will refresh your **HOME Menu** and you will see the **Job Variance** list view:

c 🗸	Job number	💷 👱 F	Filter	
now comp	leted jobs er and dro	op it here to group by	that column	
Job	Description	Cost Variance	8 % Variar	nce
0000137	Bicycle	466,041.67	51.66	-
00000140	Handle Bar Assembly			
00000141	Radially Spoked Front Wheel	0.02		
00000142	Radially Spoked Rear Wheel	0.02		

For most Customized Panes you will now have to add any toolbar buttons to the Web View, but a list view is different in that it will automatically show the **REFRESH** and any other pane toolbar buttons in the grid toolbar area. Thus, in the example above, the **REFRESH** button, **JOB NUMBER** field and **SHOW COMPLETED JOBS** are displayed in the grid toolbar. The **REFRESH** and **SHOW COMPLETED JOBS** are shown as icons in the toolbar because of their associated icons in SYSPRO.

For the purposes of this example, we will now add the customized pane toolbar buttons to the Web View.

Note: Toolbar buttons that are edit controls (i.e. entry field and check box type) should be added to a FORM in a Web View, and simple (non-editable) buttons should be added to a LAYOUT section.

Select **Design Web View** and add a **FORM** layout section (Single Form) to left-hand section.

Click on the **PLUS** icon to add fields to the Form.

Click on Entry Fields, and select CustomizedPaneButtons for Work in Progress Job Variance:

Search for or select a field below		
arch for a field		
< All / Entry Fields		
CustomizedPaneButtons for AR at a Glance		>
CustomizedPaneButtons for My form		>
CustomizedPaneButtons for Sample Stacked Bar		>
CustomizedPaneButtons for Work in Progress Job Variance		>
	Cancel	Add field

Add the two fields **JOB NUMBER** and **SHOW COMPLETED JOBS** to the form:

Search for or select a field below		
earch for a field		
All / Entry Fields / Customized Pane Buttons for Work in Progress Job Variance		
1 Job number		Quick add
Show completed jobs		
	Cancel	Add field

To add the **REFRESH** button to the Web View, add a single-column layout section:

Configure new layout se	ection						
1 What would you like	to add?						-
Layout section							-11
2 Select a layout secti	on						11
1 column	0000			I	8	< >	11
— T							-11
	Layou	it sectior	n preview	/			

Click on the **PLUS** icon to add a widget to this layout, select **Links**:

Display Fields		> ^
Entry Fields		>
Links		>
	or	
Free text field		-
		Cancel Add field

Select ToolbarPaneButtons:

SmartTags	>
Listviews	>
ToolbarButtons	>
<u>ToolbarPaneButtons</u>	>

And then select and add the field **Refresh (Customized Pane: Work in Progress Job Variance)**.

To enhance the appearance of the field, select **Show as button**.

Search for or select a field below	2 Field styling options	
ch for a field	Show field caption	
All / Links / ToolbarPaneButtons	Text to display	
efresh (Customized pane: Work in Progress Job Variance)	Refresh	
efresh (Customized pane: My form)	Text alignment	
efresh (Customized pane: AR at a Glance)	E = =	
lick me (Customized pane: AR at a Glance)		Button colour
efresh (Customized pane: Sample Stacked Bar)	Show as button	
un a script (Customized pane: Sample Stacked Bar)	$Editicon \boldsymbol{\rightarrow}$	
		Cancel Save changes

Now click on **Save Layout**.

The **HOME Menu** Web View should now look like this:

SYSPRO'Avanti Home > Ho	ome Menu			1 Q E	Phil
				с \star	\$
	WIP Job Variance			A. 199	The state of the s
Refresh			· · · · ·	-	_
	Refresh Job nur	nber	E	Filter	_
ob number	Drag a column hea	der and drop it here to group by that	column		
	Job	Description	Cost Variance	% Variance	
Show completed	00000137	Bicycle	466,041.67	51.66	*
	00000140	Handle Bar Assembly			
	00000141	Radially Spoked Front Wheel	0.02		
	00000142	Radially Spoked Rear Wheel	0.02		
	00000146	Racing Bicycle	-91.65	-0.06	
	00000147	Racing Bicycle	74.35	0.24	
	00000148	Racing Bicycle	-191.00	-0.54	
	00000151	Racing Bicycle	-191.00	-1.78	
	00000149	Racing Bicycle			
	00000150	Racing Bicycle			
	00000152	Bicycle Brake Assembly			
	00000154	Racing Handle Bar Assembly	70,714.00	99.68	
	00000155	Racing Spoked Front Wheel	69,619.10	100.00	-
	4				•
				1 - 112 of 112 iter	ns

ADDING A NOTEPAD TO AVANTI

Notepads that are built into a SYSPRO application, or Customized Panes that use the notepad control, can be added to a Web View to be shown in Avanti.

Notepad		×
A 🖶 🐰 🖻 🛱 与 ∂ B		
Notepad notes as entered into	SYSPRO's notepad in the the main t	nenu ^
Date	To do	_
Today	Notify marketing of our latest	
	release	
		_
		×

Here's an example of SYSPRO's notepad that's included in the main menu:

And here are the same notes shown in Avanti:

→ C ① File file;///C:/RND800/BASE/_SYSPRO_Fusion/Stagin	y/TestHarnessReleaseBC.html#	* 0
🗮 💰 SYSPRO'Avanti Home > Home Menu		🌲 🔍 😝 Phil
istomer Query Inventory Query Amazing view Avanti Show messages		C \star 🌣
Customers Deposits and Deposits and Deposits and Withdrawals		Ö
	Notepad notes as entered into <u>SYSPR</u> menu. Date To do	
Release 🗊 GL Journal Entry 🗃 Customers 🗊	Today Notify release	marketing of our latest
Sales Order 원 Entry Back Order 원 Review Release		
OUTDOORS Company (EDU1) Thursday 31 January 2019	<	•

To add a notepad to a Web View, launch the Visual Designer and select to add a new Layout Section.

If the application includes a notepad control this will be indicated:

1 What would you like to add?	Configure new layout s
Notepad	/
Layout section	1 What would you like
Tile section	No. of Action
Card	Notepad
Chart	2 Select notepad wid
Form	-
Grid list	O SYSPRO Notepad
Tree list	
Notepad	

Both built-in notepads and any customized pane notepads will be shown here. Select the notepad, click on Save Layout and automatically any notes associated with the notepad will be shown in Avanti's notepad.

When you click anywhere in the Avanti notepad, a popup menu bar will display the available functionality:

ate oday	To do Notify marketing of our latest release
	Times New Ro
	Product
5 - 5 - 5 - 5 - 5 -	Create a 2 x 3 table

Considerations:

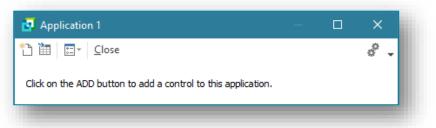
- The notes entered in Avanti are in HTML format and these are converted on-the-fly to the RTF (rich text format) required by SYSPRO's notepad control.
- If the notepad in SYSPRO includes a SAVE button then this will be shown in Avanti's notepad toolbar as well.
- Notes in Avanti are automatically saved where appropriate, just as they are in SYSPRO itself. For example, there is no SAVE button in SYSPRO's main menu notepad because any notes entered there will be automatically saved when you exit SYSPRO. And in Avanti the same principle applies: when you exit Avanti then any changed notes will be automatically saved.

HOW TO PRESENT APPLICATION BUILDERS IN AVANTI

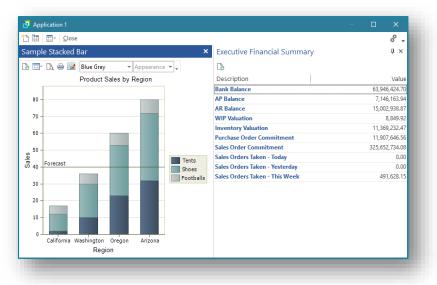
An application builder in SYSPRO is a collection of Customized Panes hosted in a SYSPRO program. Up to 20 such programs (named **IMPDH1** thru **IMPDH9**, and **IMPDHA** thru **IMPDHK**) can be built in SYSPRO, and these can be surfaced in Avanti, either at the operator or role level.

To present an application builder in Avanti, follow these steps:

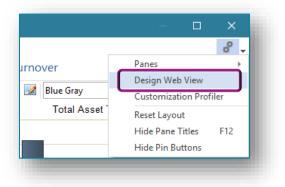
Create the Customized Panes in SYSPRO first.
 For example: Here's a blank Application 1 in SYSPRO (IMPDH1):



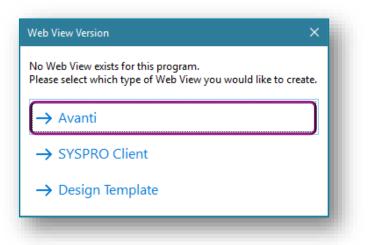
After adding two Customized Panes using the built-in samples for a list view (Executive Financial Summary) and a graph (Sample Stacked Bar), it looks like this:



- 2. Exit out of the Application Builder to save away any new Customized Panes just added).
- 3. Relaunch the Application Builder and select **Design Web View**:



4. Select to design for Avanti:



5. Click on **Add layout section**, and add the Grid List **Executive Financial Summary** and the chart **Sample Stacked Bar**.

Visual Designer: Application 1 Editing: settings\UX_Phil_IMPDH1LZJSON (Avanti)	— 🗆 X
ose 🔛 Save Save As New Delete View Design Template Edit Macro	° -
💷 🔁	r ~ ? ∧
L Add toolbar item	L Add toolbar item
Add layout section	Add layout section
\uparrow	
Add or drag layout sections to an	y of the columns above to start

6. Remember to add a CLOSE button to the toolbar:

Select item to add:		2 Cor	nfigure t	oolbar ite	em:		~
< All / Standard	~	Item tex	-				
Application Title		Enter too	lbar item	n text			
× (Close)		ltem too Enter too		tip			
💽 (Import)		Select a	n icon		Cle	ar icon se	lection
o (New)			~			-	•
OnClose VBScript Event	~	×	=	×	cc		
					20	\sim	
				Cance	l Ad	ld toolbar	ritem

7. Save your Web View.



In Avanti, to run this Application Builder, click on the hamburger menu, open the **Administration** folder and click **Application 1** to run:

SYSPRO Avanti	Home	>	Home Mer
Search for a program			
C Recent programs			>
Business Insights			>
🗅 Accounts Payable			>
C Accounts Receivable			>
Administration			^
(i) About SYSPRO			0
Application Builder			^
Application 1			0
Application 2			0

Your application 1 will now be launched. The title of the Application Builder will be shown in the Avanti menu bar:

SYSPR0 Avanti Hom	e 🕻 Avanti App Build	er			Q OPhil
					🗙 Close 🔹
ecutive Financial Summar	V	A STATE	Product Sales by Reg	ion	ALC: ALC: ALC: ALC: ALC: ALC: ALC: ALC:
C	_		Thouse sales by heg		
U	🖭 🛓 Filter		10 -		
Drag a column header and drop	it here to group by that col	umn	8 - ي		
Description	: Value	:	0 0 0 0 0 4		
Bank Balance	63,946,424.70	*	2 -		
P Balance	7,146,163.94		0		
R Balance	15,002,938.87		California	Washington Oregon	Arizona
VIP Valuation	8,849.92			Region	
nventory Valuation	11,369,232.47		View data		~
Purchase Order Commitment	11,907,646.56				
Sales Order Commitment	325,652,734.08		A REAL PROPERTY AND INCOME.	Wines and the second second	
Sales Orders Taken - Today			- All Contract of the second		
Sales Orders Taken - Yesterday					
ales Orders Taken - This Week			THE R. LEWIS CO.		
			No. of Concession, Name		
		-	the second s		

NOTES ON .NET USER CONTROLS AND AVANTI

By default, .NET User Controls added to an application in SYSPRO will not execute when you are running Avanti because the control is not necessarily suitable to be rendered in a Web page.

However, the output from a user control could be directed, for example, to a Listview which in turn can be shown in the Visual Designer.

The control must be explicitly informed that it must be executed by enabling the option **Execute control when running in Avanti**:

.NET User Control			
Assembly name		SYSPROMA_ReportQueue.dll	Q
Assembly namespace		SYSPROMA_ReportQueue.Docur	nen 👻
Namespace methods		QueryDocumentInbox	-
Execute control when r	unning in Avanti)
	User controls do r when running in A this option is chec	Avanti unless	
			_

If a .NET User control has any User Interface interaction, then this will not appear in Avanti.

Here are some suggestions on how to convert User Controls for use in Avanti:

Option 1: Convert to SYSPRO UI and use VBScript

The business logic can be kept the same but all UI must be removed and instead sent to SYSPRO via events to create list views, forms and charts using VBScript Customization and power tailoring.

Option 2: Cards

For UI controls not supported for SYSPRO Avanti these would need to be built as a card with HTML and JavaScript. (Skills required: HTML, JavaScript, Jquery)

A card builder to be released in 2019 R2 will provide a WYSIWIG designer to build cards using business objects and other XML data sources.

Cards can be used in both Avanti and Web Views within SYSPRO, making them ideal for cross-platform use.

Option 3: Native Avanti Application

A development extension for Visual Studio will be released to allow third party developers to develop new plugin modules for Avanti entirely in C# .NET. These will be completely debuggable, able to call Business Objects and will get all of Avanti's customization and personalization functionality out of the box for anything they develop.

There will be an extensive training guide and course put together to address this, when native Avanti applications become generally available.

USING E-SIGNATURES IN AVANTI

When an e-signature in SYSPRO is triggered various actions can take place.

The following actions will not work correctly in Avanti:

- Running an application (an .EXE)
- Running a SRS report
- Emailing

CUSTOMIZATION MANAGEMENT BY ROLE IN AVANTI

You can use the **Customization Management** program to manage customizations of Web Views or Workspaces by role. This is accessible from the **Administration** tab of the SYSPRO Ribbon Bar.

From here you can view and manage the workspaces and Web Views created at the role level.

us Cus	tomization Management							- C) X
Layout	Category * Select <u>r</u> ole: {ALI	.} ~	→ 🗄	E <u>x</u> pand		Export Export	🛅 Import		
<u>D</u> verride	e List								¢.
Cus	stomized Layouts by R	ole							Ą
	search text	₹ .							
Role	Program and Layout	Description	Reset	Сору	Associated	VBScript			
A A	Account Manager (100)		reset	сору					
	Flow graph	Flow_test flow.xml	delete						
	Workspace	Credit Checking	delete						
	Workspace	Customer Validation	delete						
	Workspace	Management Processes	delete						
	Workspace	my new	delete						
	Workspace	Pay Process	delete						
	Workspace	Prospects	delete						
	Workspace	Sales Order Processing	delete						
	Workspace	Special Inventory Queries	delete						
	Workspace	Special KPIs	delete						
	Workspace	To-do List	delete						
	Webview Primary	AR Customer Query	delete	сору					
	Webview Primary	Main Menu	delete	сору					
	Webview	Inventory Movements - Adjustments	delete	сору					
	AR Customer Query		reset	сору					

CURRENT RESTRICTIONS IN AVANTI

This section describes restrictions in Avanti in this pre-release.

These restrictions will be removed in the future.

ITEMS CURRENTLY NOT SUPPORTED IN AVANTI

The following items are not currently supported in Avanti:

- Structured GL entry.
 (Ledger code entries are presented by sections in a drop-down list)
- The facility to print list views content.
 (You can, however, export to Excel and PDF)
- SYSPRO Customized Panes are partially supported in Avanti.
 (Please read the section <u>Showing Customized Panes in Avanti</u> for more information)
- Form Actions associated with Forms in SYSPRO are currently not surfaced in the Avanti Visual Designer and therefore cannot be shown in a Web View.
- While Task Dialogs (message boxes and Toast Notifications) are fully supported in Avanti, any customizations done for Task Dialogs are currently being ignored.

VBSCRIPT FUNCTIONALITY SUPPORT IN AVANTI

Most of the VBScript functionality used within SYSPRO is supported in Avanti, except for the following VBScript form events which will have no effect in Avanti:

- OnBeforeChange
- OnGainFocus
- OnLostFocus
- OnButtonClick

The behaviour of list views in Customized Panes differs slightly between SYSPRO and Avanti.



Consider the following list view, constructed using a customized pane:

Customer Name Selected
0000012 QC

This is a simple editable grid, with 3 columns, and was constructed using the following two properties for the <Columns> element in the VBScript:

AutoInsert='true'

AllowDEL='true'

These properties mean that you can add rows to the grid, and that you can press the DEL button to delete rows.

In addition, the script for this list view has an **OnDblClick** event.

In Avanti, you cannot press 'DEL' and nor can you execute a 'double-click'. Instead, these button clicks are controlled through buttons added to each row.

And so, this is what this grid looks like in Avanti:

≡+ G					💷 👱
	Customer	Name	Selected	÷	
/	0000012	ABC			*

Clicking on the **DELETE** button in the row will execute the **OnDELPressed** VBScript event.

Clicking on the **ACTION** button will execute the **OnDblClick** VBScript event.

And because the property **AutoInsert** is set to 'true', the **ADD** button has been added to the grid toolbar.

DESKTOP ALERTS

Using VBScript, you can create alerts that appear in SYSPRO as popup messages.

This simple script:

```
dim Popup
Popup = Popup & "<Popup Duration='05' Animation='Fade'>"
Popup = Popup & "<Heading Text='Click to perform an Inventory
Receipt' SYSPROProgram='IMP010' />"
Popup = Popup & "</Popup>"
CustomizedPane.CodeObject.DesktopAlert = Popup
```

will result in the following desktop alert in SYSPRO, and clicking on the hyperlink will launch the program IMP010.



In Avanti, this desktop alert will look like this:



BEHAVIORAL DIFFERENCES BETWEEN AVANTI AND WINDOWS CLIENT VERSION

CUSTOM FORM FIELDS IN AVANTI

Custom fields that have been added to forms in SYSPRO Windows client can be surfaced in Avanti using the Visual Designer. By default, the applications that ship with Avanti do not and cannot include any custom form fields as it has no prior knowledge of them.

The same is true for any Customized Panes that have been added to an application. Such panes will need to be added to the Web View using the Visual Designer.

AUTO-LOADING OF FORM VALUES IN AVANTI

Against certain FORMs in the SYSPRO Windows Client you can switch on the option to **Load Previous Form Values**.

This option indicates that SYSPRO will automatically remember any form options you have changed and reload them next time the program is launched. This only applies to forms that are editable and are appropriate to save their form values – typically, when the form values are criteria entries.

In Avanti this is automatically in use. As an example, any options changed in the criteria for the **Back Order Review** program (shown below) will be saved and re-applied when the program is next launched.

ack Order Review Criteria						
Start Review				×	0 🌣	^
Stock codes		^	🚥 Sequence of relea	ise		
Stock code selection	From stock code		Sequence 1	Order number	-	. 1
		Q	Sequence 2	Order number	-	. 1
O Range O Single	To stock code	Q	Limit of selected orders	0		.
O List	List of stock codes Define list	Q	Include/exclude of the second seco	options	~	
			Warn before applying release quantity			
🏦 Warehouses		~	Do not warn before applying alternate			
2 Customer classes		~	Quantities to be reserved			. 1
Product classes		~	Request lots/bins/serials when reserving			
Geographic area se	lection	~				
🛤 Shin dates		~				-

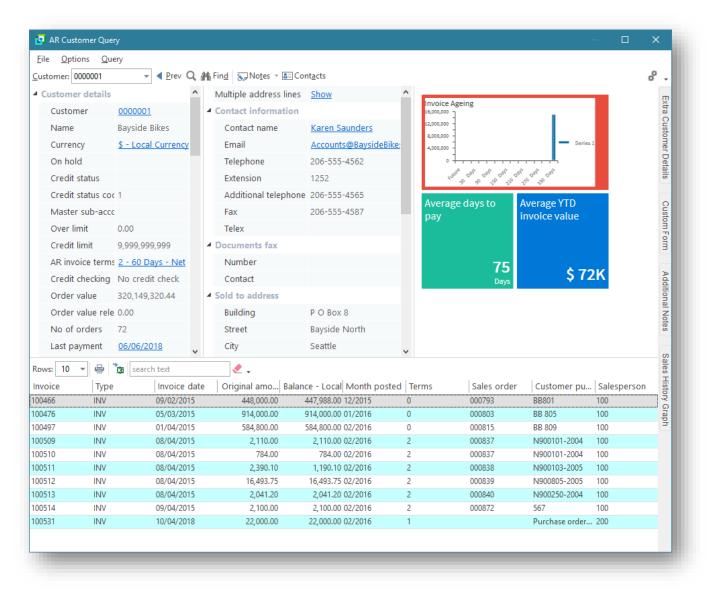
USING WEB VIEWS IN WINDOWS CLIENT VERSION

The Web Views that are used in Avanti can also be used in the Windows client version.

However, this is not generally recommended. While technically this would work (apart from some differences noted below), the Avanti Web View interface is quite different to that used in the Windows client version and it would be confusing to the user to have some programs displaying the web interface and others using the Windows interface.

Having said this, including a Web View that shows Business Insights in some SYSPRO programs might be very useful.

Here's an example of the **Customer Query** program in SYSPRO that includes a Web View showing some Business Insights:



Considerations:

If you do use Web Views in the Windows client there are some differences:

- Predictive search is currently not enabled in toolbars or form fields.
- The search button is not shown next to toolbar 'key' fields.
- The standard SYSPRO toolbar will be hidden if the Web View contains a toolbar. The exception to this is that the Ribbon Bar in the main menu will always be shown.
- Remember that Web Views designed for the SYSPRO client will not appear in Avanti.
 This means you can design Web Views for SYSPRO that are appropriate for the SYSPRO client interface.

You can implement a Web View for most of the SYSPRO programs either by using a standard template (one already built for use with SYSPRO Avanti), or by designing a new Web View from scratch. In both cases you would use the Visual Designer to accomplish this.

UPGRADING TO SYSPRO 8 FROM SYSPRO 7

If Web Views were created in SYSPRO 7 then these will be assumed to have been designed for Avanti, and will therefore no longer appear in the SYSPRO Client.

If you wish any existing customized Web Views to appear in the SYSPRO Client, please read the section **Save as a different Web View**.

Prior to SYSPRO 8, version **2019 R1**, any customized web view by operator or by role would have been assumed to be surfaced in both SYSPRO itself and in Avanti.

In the latest release and onwards, this is not the case and any such pre-existing Web Views will be assumed to be for Avanti only, as you must now explicitly state if a web view is targeted for SYSPRO or for Avanti.

Therefore, if you have created Web Views for prior versions of SYSPRO and wish them to appear in SYSPRO in future, you will have to either rename the JSON file, or use the 'Save as...' option in the Visual Designer (please read the section **Save as a different Web View**).

To rename an existing Web View JSON extension residing in your ...\base\settings folder or in a Role_xxx folder, you should add the _syspro extension.

Example: If you have a Web View in ...\base\settings (by operator) for the Customer Query application and you wish the Web View to continue being surfaced in SYSPRO, then the filename should be: UX_operator_ARSPENLZ_SYSPRO.JSON.

USING MSGBOX AND INPUTBOX FUNCTIONS IN A VBSCRIPT IN AVANTI

Any **MSGBOX** and **INPUTBOX** functions in a VBScript will execute within the SYSPRO system on the application server.

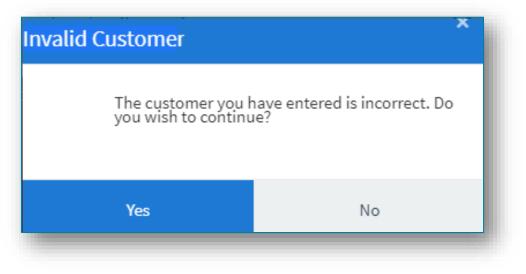
When running in Avanti such functions would cause Avanti to appear unresponsive as user action is required. To overcome this problem these VBScript functions are converted just before a script is to be executed so that the MSGBOX function calls a SYSMSG function, and INPUTBOX calls a SYSINPUT function.

SYSMSG and SYSINPUT are functions that convert a MSGBOX or INPUTBOX statement into an equivalent JSON Task Dialog format suitable for executing in Avanti.

Thus, a MSGBOX in SYSPRO that looks like this:

Invalid Customer	
The customer you have entered is incorrect. Do you wish to continue?	
Yes <u>N</u> o	

... will appear like this in Avanti:





Similarly, an INPUTBOX in SYSPRO that looks like this:

💽 My name	×
Enter your name	ОК
	Cancel
John Smith	

... will appear like this in Avanti:

ly name	^
Enter your name	
ок	Cancel

In addition, the Timeout value for a script will be set as -1, indicating no timeouts will occur.

Again, this is to prevent the system from appearing to be unresponsive if a timeout message were to be displayed.

ARCHITECTURE

Avanti is built using modern web technologies.

Technically, Avanti has the following characteristics:

Avanti is a single-page application (SPA)
 This allows Avanti to provide an experience akin to a native application on either a
 mobile device or a desktop browser. Avanti improves performance because only data
 is transmitted to the browser, which takes less time and bandwidth than constantly
 sending fully constructed HTML pages.

Avanti is a responsive web application

The design of the UI is fluid, meaning the web page content automatically fits into the available screen size, whether you are using a desktop browser or a smartphone. In short, Avanti ensures that it is effective and easy to use on any device.

The purpose of this section is to provide a high-level technical overview of the SYSPRO Avanti Architecture. It details the different deployment tiers as well as the technologies used by SYSPRO Avanti along with the key benefits.

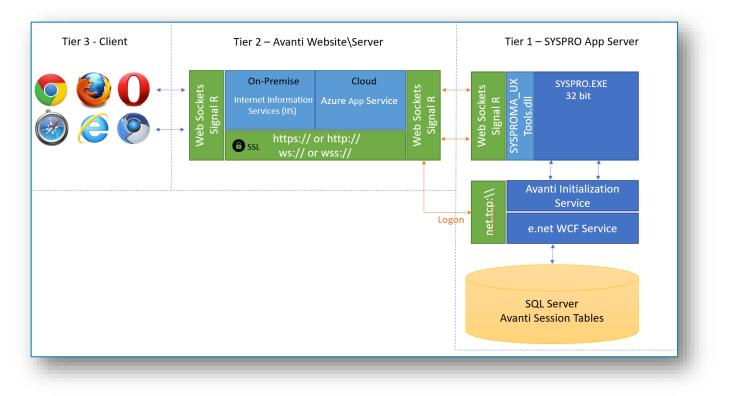
The technologies discussed will be both from an on-premise and cloud deployment perspective.

HOW AVANTI WORKS

The following process/workflow describes how Avanti, authenticates and how information is passed from one tier of the architecture to the other:

- 1. A user will access Avanti through a web browser using an address specifically setup by the SYSPRO administrator for the installation of SYSPRO.
- 2. Once the address of the Avanti website is entered into the browser, a logon screen will be displayed, allowing the user the capture their user name, password along with the company details.

- 3. When the logon button is clicked, a request is sent to the Avanti Website, which will in turn sends a request to the Avanti Initialization Service for the credentials to be validated. The initialization service does not have any authentication built into it. It relies on the "standard" authentication model of core SYSPRO.
- 4. Once authenticated there will be no further workloads for the Initialization service until another user logs on. From there on in the SYSPRO executable will respond to any requests made by the web browser.
- 5. All requests and responses made from web browser will be routed to the Avanti website then relayed to the SYSPRO App server, then back to the Avanti website and finally back to the browser.



SYSPRO AVANTI ARCHITECTURE DIAGRAM

The above diagram illustrates the 3 different tiers.

TIER 3 – CLIENT (THE BROWSER)

The client tier is the initial touch point for any users wanting to make use of SYSPRO Avanti.

Using a web browser that supports HTML 5, a user can browse to the website where Avanti has been installed to. All UI (User Interface) elements in Avanti have been built using modern web based technologies such as <u>HTML 5</u>, <u>JavaScript</u> and <u>CSS3</u>.

Avanti has been developed from the ground up to adhere to <u>responsive web designs</u>. This enables Avanti to run on any device and any platform regardless of form or size factor. As the size of the device or web browser increases or decreases, Avanti will automatically adjust itself to best suit its environment.

Avanti has also followed the <u>SPA (Single Page Application)</u> design philosophy. This allows data to be dynamically bound to a page instead of the page being regenerated all the time, thus saving time, bandwidth and increasing the overall performance. This modern design also avoids disruption in the users experience within the application. SYSPRO Avanti is delivered via a web browser and requires no pre-requisites or software to be installed on the user's machine, making Avanti have a zero footprint on the client.

TIER 2 – AVANTI WEBSITE\SERVER

Tier 2 the Avanti Website, is the tier that handles the requests/responses from the web browser to the SYSPRO Application Server.

This tier can be installed on a traditional Windows Server running IIS (Internet Information Services) or it can be installed to an Azure App Service. This tier has been purposefully built to run in the cloud but can run on premise just as effectively.

The Avanti Website can be secured by the administrator using SSL. The data in transit from the Website to the web browser and vice versa is compressed by the Avanti infrastructure and provides compression levels of up to 95%, thus adding to the overall performance of Avanti.

A web technology called <u>WebSockets</u> in conjunction with Signal R allows for robust communication between the Avanti Website and the web browser. With this technology, SYSPRO Avanti can reconnect to the SYSPRO App Server and web browsers when there is a drop-in network connectivity, once again adding to the reliability of SYSPRO Avanti.



When running Avanti on-premise, it has been optimized to have an auto update setting. This allows any new Avanti features that was released on a SYSPRO port to be updated on the Avanti Website automatically, without the need of the administrator.

When running Avanti in the cloud and making use of the Azure App Service infrastructure, we also make use of a technology call ARM (Azure Resource Manager) templates that allows the Avanti Website to be updated automatically.

Along with this there are several out of the box benefits that customers inherit with running in the cloud, i.e.:

- **Cost**, it is much cheaper to run in an Azure App Service. App Services make use of server less compute, so you only pay for the compute, that is, no windows licenses.
- **Scaling**, you can scale the infrastructure up or down depending or your requirements. There is also an auto scale feature that will detect the workloads on the website and will automatically scale the infrastructure accordingly.
- **Phishing/DSA**, the Azure App Service infrastructure has intelligent M/L algorithms that can detect Phishing attacks as well as Denial of Service attacks and can notify administrators before any major harm is done.

TIER 1 – SYSPRO APP SERVER

There has been an introduction for an Avanti Initialization Service, this service's sole responsibility is to do a handshake between the SYSPRO executable and the Website for each user that has logged on.

A few new tables have been also included to the SYSPRO SQL Server company wide database which is used to maintain state for the users using Avanti.



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