

Highlights: User Experience

SYSPRO 8

Reference Guide

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User Experience

The following provides a summary of the newly-developed features and functionality available in **SYSPRO 8**.



SYSPRO 8 serves to boost user experience and promote improved business behavior. It achieves this through enhanced intuitiveness, simplicity and engaging innovations.

2019-R2

SYSPRO Scheduler

The **SYSPRO Scheduler** lets you schedule a pre-determined activity at a given time in the future and then send a trigger for that activity at the appropriate time.

A calendar view (similar to **Microsoft Outlook**) is accessible from programs that have been designed to use the **SYSPRO Scheduler**. This lets you view existing tasks that have been scheduled as well as create and maintain schedules using the **Maintain Schedules** program.

Features currently using the **SYSPRO Scheduler**:

- **Cycle Count**

This creates a cycle count schedule of stock counting policies.

SYSPRO Avanti

A number of new capabilities have been added to SYSPRO's web-based platform.

SYSPRO Supply Chain Portal

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the **SYSPRO Avanti** HTML5 user interface.

Adding Portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

Features currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System:
 - This lets you collaborate with your suppliers by automating the quote process and enabling suppliers to action an RFQ.

Translation

All fields in **SYSPRO Avanti** can be translated into a different language (with the exception of the logon screen).

This is applied when the language is configured within the **System Setup** program of the SYSPRO core product.

Notepad and RTF Support


Notepads that have been built into a SYSPRO application (or Customized Panes that use the notepad control) can now be added to a web view to be surfaced in **SYSPRO Avanti**. There are two types of notepads: simple text notepads and Rich Text Format (RTF) notepads.

The rich text notepad displays a special toolbar with all the formatting options. This toolbar does not appear for a notepad that only supports simple text (e.g. the **Additional Notes** in the **Customer Query** program).

Considerations:

- In SYSPRO, all complex notepads are stored in RTF format. Because this format is not supported in a web browser, it needs to be converted to HTML format for rendering in **SYSPRO Avanti**. The converse is also true - when saving notes entered in **SYSPRO Avanti**, the system must convert the HTML format to RTF format.
- If the notepad in SYSPRO includes a **Save** button, then this will also be shown in the notepad toolbar of **SYSPRO Avanti**.
- As in SYSPRO, notes in **SYSPRO Avanti** are automatically saved where appropriate (e.g. there is no **Save** button in SYSPRO's main menu notepad because any notes entered are automatically saved when you exit SYSPRO).

Visual Designer by Role

You can now design web views by role in **SYSPRO Avanti**. From within a **SYSPRO Avanti** program, select **Design Web View by Role** from the **Customize**  icon and then specify the role for which you would like to design the web view.

Customized Pane Support

Toolbar buttons for **Customized Panes** are now surfaced in the Visual Designer and can be added to a web view.

Gantt, Pie and Funnel chart support

You can now add Gantt, Pie and Funnel charts to visually represent data in **SYSPRO Avanti**.

Global help support

The SYSPRO Online Help can be accessed by pressing **F1** in **SYSPRO Avanti**.

Forgotten password

The **Forgot Password** functionality (which allows operators to reset their SYSPRO passwords without administrator assistance) is now available for **SYSPRO Avanti**.

Workspaces

You can define multiple workspaces in the home menu, when it is not associated with a role.

Sort search by relevance

The order of preference or relevance that is displayed in search results (based on the search term or phrase entered) returns more accurate and relevant results.

The relevance of results and weighting is determined by the order in which the fields are displayed, or ordered in the search. You can now configure whether relevance is applied against a search using the **Espresso Search Configuration** program in the SYSPRO core product.



If you have previously created your own customize searches, the relevance option is not automatically applied to them. If you want to enable relevance, you will have to do it manually.

Additional VBScript Support

Although VBScript provides functions and sub-routines, basic date/time and string manipulation, math functions, user interaction, error handling, and regular expressions, additional functionality can be added using ActiveX technologies.



VBScript Desktop Alerts are now surfaced as Toast Notifications in **SYSPRO Avanti**.

The following VBScript functions are now supported for grids in **SYSPRO Avanti**:



- OnPopulate
- OnSubmit
- OnRowSelected
- OnDbClick
- OnLinkClicked
- OnAfterChange

Additionally, the following functions are now supported for customized pane list views:

- OnDELPressed
- OnChecked

2019-R1

Avanti Change Password

SYSPRO Avanti lets users change their own password when logging in, reducing workload on system administrators.

This facility is available from the login screen, similarly to conventional SYSPRO.

Point Of Sale

New capabilities

- **Sales Orders** now allow for tax codes to be applied by line item.
- The **Quotes** search now includes the originating operator.
- The **Customer Query** now displays Contacts as recorded in Contact Management.
- The **Take Payments** program now allows operators to review payments before finalizing a transaction.
- A security option has been added to request operator validation before taking payment.
- The **Inventory Query** program now displays defined custom form fields against stock items.

Numbering

Invoice numbers and Quotation numbers can now be recorded separately as Point of Sale transactions.

Benefits:

- Supports governance requirements for Sales Tax Reporting
- Ensures sequential POS invoice numbering

2018-R2

Avanti Workspaces

Workspaces are customizable dashboards in **SYSPRO Avanti** that supply user roles with everything they need to perform their tasks efficiently and effectively.

They are essentially web views for roles and can contain anything that can be designed in the Visual Designer (e.g. Business Insights, Program Tiles, Charts, Flow Graphs, Cards, Grids, Forms, and any customized panes associated with the role itself).

A workspace is a way of grouping tasks or processes together in a way that is meaningful or relevant for an individual's role (i.e. similar to a **Favorites** menu, except that it is defined at a role level).

Benefits:

- Users have access to a single, customizable and personalized workspace.
- A single dashboard provides a view of the activities, actions and events most relevant to the user.

Avanti Flow Graphs

The **Avanti Flow Graph Designer** lets you add flow graphs to programs as well as create custom flow graphs to streamline your daily activities. A flow graph typically contains programs, reports and tiles that form part of a business process that you can navigate by selecting the flow graph entities.

2018-R1

SYSPRO Avanti

SYSPRO Avanti is SYSPRO's web-based user interface developed in HTML5. It lets you access SYSPRO using a web browser, on any device, on any platform, from any location, at any time. It's available to anyone who has installed **SYSPRO 8** (whether on-premise, in the cloud or both) using a concurrent single license. This lets customers choose the user interface best suited to the specific task at hand.

Benefits:

- Enables you to work where and when you want

Access and experience the same SYSPRO solution on all devices 24/7 no matter your location - whether in the office, on the shop floor or on the move, you can choose the device that best suits the task at hand.

- Familiar experience

SYSPRO Avanti, with its consistent user interface, uniquely gives you the same SYSPRO ERP experience through a browser on any device, without having to learn a different operating system.

- Quick and easy access

If you're in manufacturing or distribution; whether you're upsizing, setting up a new company or expanding your multinational organization to new territories, SYSPRO's web interface gives you quick and easy access to SYSPRO through a browser.

- Flexibility and choice

Select the best user interface for the role, or specific task at hand.

- Engaging user experience

SYSPRO's web interface is easy to use, intuitive and responsive, providing you with a simplified, engaging and rewarding experience.

- Personalize your workspace

The **SYSPRO Avanti** web interface lets you personalize and design your workspace without the need for development skills.

Web Views

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

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

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

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

Single Setup Program

SYSPRO's **Setup Options** program provides a central area from which implementers are able to quickly configure SYSPRO modules as well as make information easily available to support staff - significantly speeding up the process to resolve issues.

Things you can do in this program include:

- Configure setup options.
- Search for and maintain setup options across all modules.
- View and compare company options.
- Import and export configurations.
- Monitor changes to setup options.

Office 365

Microsoft Office 365 lets you access the latest versions of Word, Excel, PowerPoint, Outlook, OneNote and more, wherever you go and across all your devices.

With Office 365 integrated into SYSPRO, there is no need for a separate desktop installation of Office 365.

You can integrate or combine SYSPRO data into an Office 365 document directly from Office 365.

Toast Notifications

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

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

Task Dialogs

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

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

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

Predictive Search

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

Search Configuration

Search Configuration allows for the configuration of searches in the Predictive Search.

Benefits:

- You can configure the Predictive Search to filter on key fields, rows and order by, to return records while typing.
- Predictive searching helps you effortlessly get to the information you need by filtering the top records in the database based on what you have typed.



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