

Task Dialogs

SYSPRO 8

Reference Guide

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Task Dialogs

Exploring

Where does it fit in?

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.



Starting

Access Control

Activities

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

Main menu - Allow to customize task dialogs

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

Restrictions and Limits

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

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

Setup Options

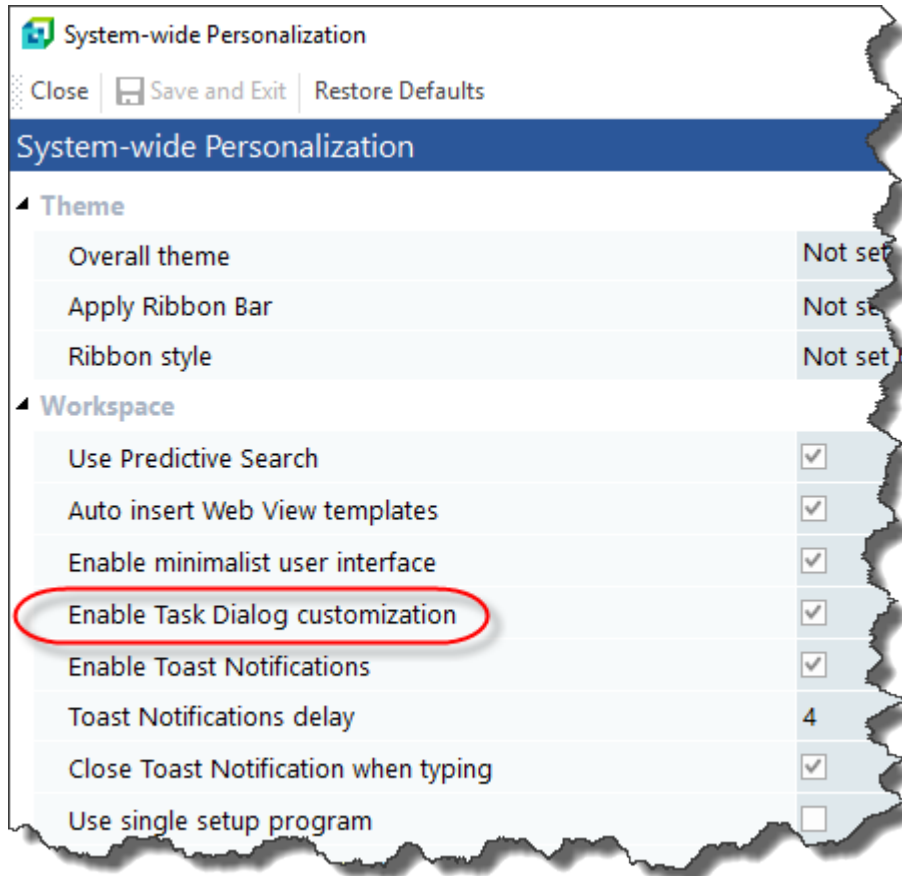
Enable Task Dialog customization

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

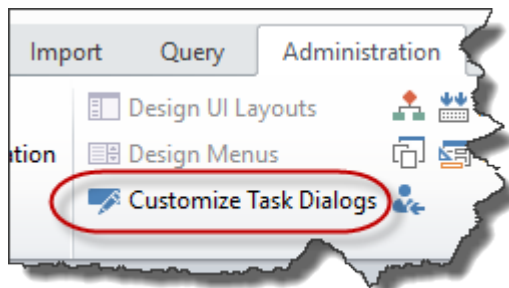
Using Tasks


How to switch on Task Dialog customization

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



The **Customize Task Dialogs** option on the **Administration** tab will be enabled when next you load SYSPRO.






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

How to customize Task Dialogs

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

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


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

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

Option	Description
Refresh this message	This lets you preview the selections you made for the dialog.

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

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

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

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

Customized Task Dialogs are saved to the following locations:

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

How to copy customizations between operators, companies and roles

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

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

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

Customization level	Naming convention
Operator	TaskDialog_Operator_operatorID.txt



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

2. Copy the file and rename it to match the level you want to create (i.e. customizations done for a particular operator can be copied over to a company or role simply by renaming and/or renaming and moving the file).



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