

# 10 Steps to 2020 R2

SYSPRO 8

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## 10 Steps to Updating to 2020 R2

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# 10 Steps to Updating to 2020 R2

This article provides a 10-step view of the process required to update to **SYSPRO 8 2020 R2** as well as a list of key considerations that includes:

- Upgrading **SYSPRO Reporting Services** to use **SAP Crystal Reports 2016**.
- Understanding the system-wide database growth that will occur because of the reduction in file system persistence.
- Understanding the changed process when creating a new company from **SYSPRO 8 2020 R2** onwards.
- Identifying areas of the product that have changed because of simplified licensing enhancements.

# Update Process

- 1 Run the **SYSPRO Installer Application** on the SYSPRO application server.
- 2 Once connected to the **SYSPRO Deployment Service**, enter your **InfoZone** login credentials. If you aren't listed as a customer (i.e. you're a Partner or Super-user) then you'll need to indicate the customer code on whose behalf you are doing the install.  
Ensure that you use the correct credentials as subsequent notifications rely on this information.
- 3 From the home screen select the **SYSPRO ERP Software** option.
- 4 Identify the deployment group you want to update and select the **Update** button.  
This creates a text file (`SYSPRO_Deployment_Release_Update.txt`) in the **SYSPRO Deployment Downloads** folder, providing details about the machines belonging to the group, as well as the software installed on each of those machines.  
Software updates must be applied to all machines in a group to complete the process otherwise the deployment group remains listed as *Update in progress*.
- 5 Select **SYSPRO 8 2020 R2** as the release to update.



The update process pauses if the system detects that **SAP Crystal Reports 2013** is installed, or if the version cannot be determined.

From **SYSPRO 8 2020 R2**, server-side reporting requires **SAP Crystal Reports 2016**. When you select to proceed, you will be routed to the **SYSPRO Reporting Software** screen from which you can install **SAP Crystal Reports 2016**.

Otherwise you are returned to the **Deployment Groups** screen.

- 6 From the **Product Updates available for Release** screen, select the products you want to update for the new release, followed by the **Continue** option.
- 7 After accepting the license terms and conditions, a summary of all products to be installed is displayed for you to review.



You can copy previously downloaded install files to the **SYSPRO Deployment Downloads** folder.

- 8 Select the **Begin Install** button to proceed with the installation of all selected products.
- 9 Update any additional servers in your deployment group requiring update (listed as *update in progress*).

10 Log in to **SYSPRO 8** as an Administrator.

A minor database update is performed to your system-wide tables and to each company-specific table.

Part of this process will migrate selected persisted data from the file system to your **Microsoft SQL Server** database.

You are now ready to start using **SYSPRO 8 2020 R2**.

# Things to Consider

## SYSPRO Reporting Services Upgrade

From **SYSPRO 8 2020 R2**, you'll be upgraded to use **SAP Crystal Reports 2016 SP8** as the reporting technology for both server-side and client-side reporting. The upgrade is mandatory for server-side reporting and optional if you are using client-side reporting.

This means that when using server-side reporting, part of the upgrade process involves uninstalling **SAP Crystal Reports 2013** from your server and installing the later **SAP Crystal Reports 2016 SP8** version. You should be aware that the uninstall and install process can take a significant time because of the complexity of the Crystal Reports product (some customers have reported this taking 2 or more hours).

When using client-side reporting, your clients can remain on the existing Crystal Reports version and upgrade to **SAP Crystal Reports 2016 SP8** later when required (i.e. they can continue to produce reports using the previous Crystal Reports version).

## Database growth & reduced file system

**SYSPRO 8** is on a journey to reduce files being persisted to the file system by migrating them to **Microsoft SQL Server**. This offers many benefits, such as helping simplify your backup strategy, improving performance, protecting your data and providing controlled access to third parties, where relevant.

Because of this, you will notice an increase in the size of your database once you update to **SYSPRO 8 2020 R2**. The increase in size will be proportional to the size of the data being migrated from the file system. Also note that the majority of the files uploaded to SQL Server are migrated to your system-wide database.

During the migration, the system will determine if your SRS Report Archive files are significant in size (over 500MB) in which case you can choose to defer the migration of these files to allow the rest of the upgrade process to complete and users to start transacting as normal.

Choosing to defer the import means that reports archived prior to **SYSPRO 8 2020 R2** won't be available for viewing until they are migrated. This is performed by running the **SRS Import Archive Files to SQL** program.

## Other consequences:

### Editing reports

As custom reports no longer reside on the file system, you must edit/design reports by right-clicking **Report Templates** in **SYSPRO Reporting Services** and then selecting the **Design Report** option from the menu.

Report designers can't edit SRS reports directly through the Crystal Designer.

## Editing documents

As custom documents no longer reside on the file system, you must use the **Design** option within the **Maintain SRS Document Templates** program.

Document designers can't edit SRS documents directly through the Crystal Designer.

## Maintaining SRS Document Templates

Whereas previously you could browse the file system to select a file that had been manually copied, the browse now functions off the database. You can now only select an existing file that is not already in the system by first using the import function of the **Add SRS Document Templates** program.

## License file

From **SYSPRO 8 2020 R2** the **License Manager** is used to select and import a provided license. The license information resides in the `AdmSystemLicense` table of your system-wide database in **Microsoft SQL Server**.

From **SYSPRO 8 2020 R2** all software that requires the license will automatically locate the current license in the system wide database.

If you are using the **SYSPRO Cloud ERP** environment, the license import is applied automatically.

## Operator Settings

As part of the effort to decrease SYSPRO's footprint on the file system, you can enable the new **PERSIST OPERATOR UI SETTINGS TO SQL** setup option (*Setup Options > System Setup > System-Wide Personalization*) to store all operator UI settings files in the `SysSettings` table of the system-wide database (usually stored in the `\Base\Settings` folder).

## Creating a new company

If you need to create a new company after updating to **SYSPRO 8 2020 R2**, you must create your database prior to running the **Add New Company Wizard**, as the **Add New Company Wizard** now prompts you for the name of the database you have already configured in **Microsoft SQL Server**.

The following database properties should be considered as part of your database management strategy:

- SQL user permissions
- Initial size and growth factor

These are critical to ensuring the effective performance of your system. Ensure that the initial size and growth factor are suitable based on your initial and planned SYSPRO growth.

- Collation

This must be defined as a case-sensitive or binary collation.

- Database and log file locations

It is critical to ensure data integrity that you separate your database and log file locations, as per your database backup strategy.

## Licensing Changes

From **SYSPRO 8 2020 R2**, the following programs have been changed to reflect whether the license in use is for standard **SYSPRO 8** or **SYSPRO Cloud ERP**:

### Company Maintenance

New fields have been added under the **Company license** section that indicate the following information if the license in use is for **SYSPRO Cloud ERP**:

- Subscription period
- License start date
- License expiry date

### Admin Shift+F7 System Information

The **Architecture** field (located under **Server environment**) indicates whether the license in use is for **SYSPRO Cloud ERP** (with a **Cloud ERP** entry) or for standard **SYSPRO 8**.

### System Setup

The license options have been removed from this program as this functionality is handled by the **License Manager** program.

### e.net Licensing

This license is now included in the system-wide license and no longer needs to be imported.

### Adding a new company

The **Add New Company Wizard** now uses the system-wide license instead of requiring you to import the license file when creating a new company for an existing system.

If you are creating a company for the first time, the **Add New Company Wizard** prompts for the license and saves it to the system-wide database.





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