

SYSPRO 8

Best Practice for Company Deletion

Technical Guide

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SYSPRO Help and Reference

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Introduction

The deletion of a company in SYSPRO is a high risk topic, however as the need for this does arise from time to time, SYSPRO would like to provide best practices for how to do this.

Therefore this guide will provide you with important information on the following topics related to deleting a company in SYSPRO 8:

- Alternative options to consider in comparison to deleting a company.
- Important aspects to be addressed **before** commencing with the deletion of any company.
- Specific steps to take in order to delete a company in SYSPRO.
- Important aspects to be addressed **after** the deletion of any company.

POSSIBLE SCENARIOS

Possible scenarios that would require the deletion of a company in SYSPRO 8 include, but are not limited to, the following:

- If you have various companies in SYSPRO but one or more are no longer in use, it may become onerous when upgrading to new versions as the upgrade process would attempt to upgrade all of the databases residing in your SysproAdmin table.
- You may wish to merge various companies into one, and to ensure the old companies are no longer used, you may wish to delete them.
- There is sometimes a security risk of having data inside inactive companies which operators can log into and transact.
- You may have created a test company that was used to verify some feature, functionality or scenario, and now wish to remove this test information. Therefore, you might want to declutter your databases and prevent accidental use of the test environment. This includes potentially having to maintain the older database when minor database upgrades are performed.

DOCUMENT OBJECTIVES AND AUDIENCE

This document is targeted at personnel working in a SYSPRO 8 support environment.

The aim is to provide the SYSPRO community with guidelines on how to handle the deletion of a company in SYSPRO 8, taking into account related information that may be relevant and helping to reduce the risk.

NOTE:

This document relates to the deletion of a company in SYSPRO 8 only and does not cover earlier SYSPRO versions.

Alternative options to deleting a company

The following alternative options to deleting a company may provide you with a simpler and safer way of disabling access to a specific SYSPRO company.

REMOVE ACCESS TO THE COMPANY

From the **COMPANY MAINTENANCE** program within SYSPRO (**IMPMCY**), you can make use of the **PREVENT LOGIN** option.

Selecting this option against a company prevents unauthorized access and ensures that operators are not able to access or capture data for the company. When disabling access to a company you should also specify a reason as this can help you remember why this company was disabled.

The advantage of using the disable function is that if you need to re-enable access to the company in future it is relatively simple.

NOTE:

Even if you disable a company, it will still be maintained when new software is installed and any database upgrades will be applied as if it is a live company.

REMOVE THE COMPANY ROW FROM THE SYSPROADMIN TABLE

Another option is to remove the company row from the SysproAdmin table of your system-wide database

Choosing this option results in the SYSPRO application being unaware that the 'deleted' company exists. Therefore, operators are unable to access or capture data for the company, or even browse on the company code.

In addition, any future software updates will **NOT** update the database relating to any company that is not defined in the SysproAdmin table of your system-wide database.

Prior considerations

As mentioned already, the process to delete a company in SYSPRO carries with it a level of risk. Therefore, please ensure to investigate and address the following considerations before any deletion process is conducted.

BACKUP

Ensure to make a backup of the following before deleting any company:

- All company related data
- Company database
- System-wide database
- Files on the file system that relate to company data – this includes Contact Management data in the WORK folder (CRM_XXXX) where XXXX is the company id being deleted).

If you intend on taking any further deletion actions as suggested in the [Post deletion – Further considerations](#) section of this guide, we recommend making a backup of any applicable files or databases beforehand.

THIRD PARTY APPLICATIONS

Ensure to check with your third party developers or partners on any possible affect that deleting a company may have on integrated systems or products.

SHARED GL

Establish if the company you wish to delete is configured with Shared GL. If Shared GL is in place, it must be disabled prior to deleting the company.

For clarity, this means that the company being deleted must not be sharing another companies GL, nor must another company be sharing the GL of the company being deleted

SHARED INVENTORY

Establish if the company you wish to delete is configured with Shared Inventory. If Inventory is shared, it must be disabled prior to deleting the company.

For clarity, this means that the company being deleted must not be sharing another companies Inventory, nor must another company be sharing the Inventory of the company being deleted.

How to delete a SYSPRO company

The following process covers the steps required for the successful deletion of a company in SYSPRO.

1. Ensure that no-one is using SYSPRO whilst performing these deletion functions.
2. From the **COMPANY MAINTENANCE** program within SYSPRO (**IMPACY**), disable logging into the company by selecting the **PREVENT LOGIN** option.

Tip...



It is suggested that you disable access to the company for a period of time (before continuing with the deletion process) to help verify that no operators require access to the company.

3. Back up the following data:
 - Company database
 - System-wide database
 - `\WORK\CRM_companyID`
4. Ensure that you have actioned all prior considerations mentioned earlier in this document.
5. If you are unsure what your system-wide database is, open your `IMPACT.INI` file (located in the `\WORK` folder of your SYSPRO installation) and identify the system-wide database name.
This is listed under the `[Database Settings]` section.
For example: `SQLDBN=Syspro8db`
6. Open the System-wide database in SQL Server Management Studio and navigate to the `SysproAdmin` table.
7. Search the `SysproAdmin` table for the row that contains the company ID and database name, and delete the row.

After this step, you will no longer be able to log into the company and SYSPRO becomes unaware that the company even exists.

Operators are then unable to access or capture data for the company, or even browse on the company code.

NOTE:

You can optionally stop here as the company is no longer accessible, however if you wish to proceed with complete deletion, please proceed to the [next](#) section.

Post deletion – Further considerations

Investigate and address the following considerations after the initial deletion process is complete. Ensure to verify that there are no long term requirements for any of the data listed for deletion.

SQL SERVER DATABASES

In **SQL SERVER MANAGEMENT STUDIO**, delete the company database. This was the database removed from the `DatabaseName` column in the `SysproAdmin` table.



Tip...

Double-check that you are deleting the correct database, as many databases could have similar names.

Then locate any databases attached to the SYSPRO company database and delete these as well. These will be prefixed with `CompanyDBname_*`.

A few examples of these include:

`CompanyDBname_POS`

`CompanyDBname_SRS`

`CompanyDBname_HRM`

CONTACT MANAGEMENT

Files related to emails and attachments are stored for Contact Management in the `\WORK\CRM_companyID` folder, as well as in the SYSPRO company database.

Therefore, establish whether you want to delete this data after deleting the SYSPRO company.

SRS DOCUMENT PRINTING (SERVER-SIDE)

If you are using server-side printing, there may be data residing inside the `CompanyDBname_SRS` database.

Therefore, establish whether you want to delete this data after deleting the SYSPRO company.

SRS DOCUMENT ARCHIVING

SRS Document Archiving stores files in the file system as well as in the company database.

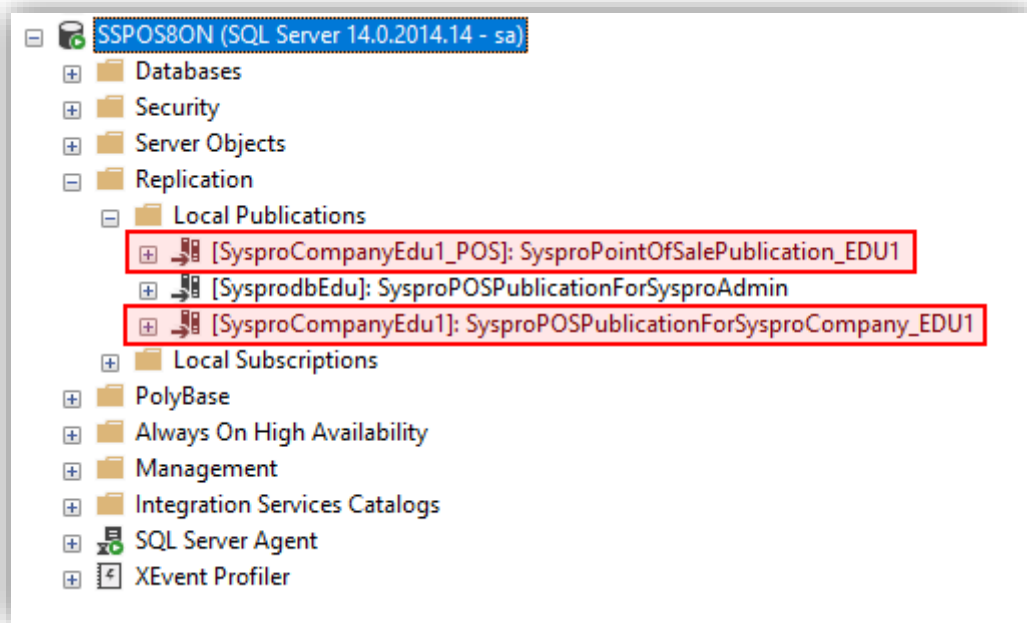
Therefore, the `\WORK\SRS_companyID` folder should be considered for deletion after the company is deleted.

However, before deleting ensure that these files do not require being kept for a period of time due to legal or auditing purposes.

SYSPRO POINT OF SALE

If the SYSPRO company that you are deleting utilizes SYSPRO Point of Sale, then the publication of that SYSPRO company database, and any related POS database, should be considered for deletion as well.

For example, the following 2 highlighted databases would be considered for deletion:



DOCUMENT FLOW MANAGER

DFM enables you to configure storage of the following:

- History of transactions that have occurred
- Copies of XML processed
- Copies of XML failed transactions

Therefore, the following paths relating to these storage options may have been configured by company and as such they should be considered for deletion, after a company is deleted:

XML DOCUMENT CONTROL APPLICATION

Depending on your configuration of the following options, history can be stored for both input and output XML:

- History path
- Failed documents path

DOCUMENT FLOW MANAGER SETUP APPLICATION

Confirm the following configuration within the **Add New Contract** wizard:

- XML history required
- Save documents
- Outgoing folder prompts

SYSPRO REPORTING SERVICES

If you are using SRS (client-side or server-side), there are various files regarding the customization of SRS which are company specific.

Therefore, after deleting a company, consider deleting the following files/folders, making backups where necessary:

REPORT FORMS

File location : C:\SYSPRO8\BASE\ReportingCustomized\ReportForm

File name : frm_sa_turnover_print_comp_companyID.xml

REPORT MENUS

File location : C:\SYSPRO8\BASE\ReportingCustomized\ReportMenu

File name : reportmenu_comp_companyID.xml

REPORT SCHEDULES

File location : C:\SYSPRO8\BASE\ReportingCustomized\ReportSchedule

Folder name : *CompanyID*

REPORT TEMPLATES

File location : C:\SYSPRO8\BASE\ReportingCustomized\ReportTemplate

File name : tem_list_of_banks_comp_companyID.rpt

BUSINESS-2-BUSINESS TRADING

B2B enables you to configure storage of the following:

- EDI files
- Exported XML files

Therefore, paths in the following programs that relate to these storage options may have been configured by company and as such they should be considered for deletion, after a company is deleted:

XML DOCUMENT CONTROL

If you have configured to store history details in the **XML DOCUMENT CONTROL** program within SYSPRO (**IMPB2B**), identify the **History path** defined for storage of EDI files.

Navigate to that folder in your SYSPRO Installation and delete the company specific files.

Files are named *companyID*.EDI* (e.g. *EDU1IN0047.EDI*)

B2B PROGRAMS

If you have configured to store **Export details** within any B2B program, ensure to delete all *companyID*.EDI* files from the folder defined in the **XML DOCUMENT CONTROL** program (**IMPB2B**). Unless the **Directory** in those programs has been overridden, in which case you can navigate to the defined folder.

SYSPRO ANALYTICS

If you are using SYSPRO Analytics, review your Analytics configuration and consider the following:

ANALYTICS SITE LINKED TO SINGLE COMPANY

If you have created an Analytics site that is linked to a single company, then you may want to delete the site as well as the site databases.

However, this is only if you no longer want to conduct analysis on the company information.

ANALYTICS SITE LINKED TO MULTIPLE COMPANIES

If you have created an Analytics site that is linked to multiple companies, then you would only want to delete the site as well as the site database.

However, this is only if you no longer want to conduct analysis for all of the companies linked to the site.

HOW TO DELETE THE ANALYTICS DATABASES

Each Analytics site has the following databases, and the database names are configured against the site:

- SQL database
- Analysis Services database

In order to delete these databases, proceed with the following steps:

1. Verify the database names

From the **SYSPRO ANALYTICS SITES** panel from the **SYSPRO ANALYTICS SETUP** program (**SAN001**) in SYSPRO Analytics, select the relevant site to view the database names.

2. Delete the SQL databases

From within **SQL SERVER MANAGEMENT STUDIO**, connect to the SQL Server and SQL Server Analysis Services Server.
Select the relevant database to delete.

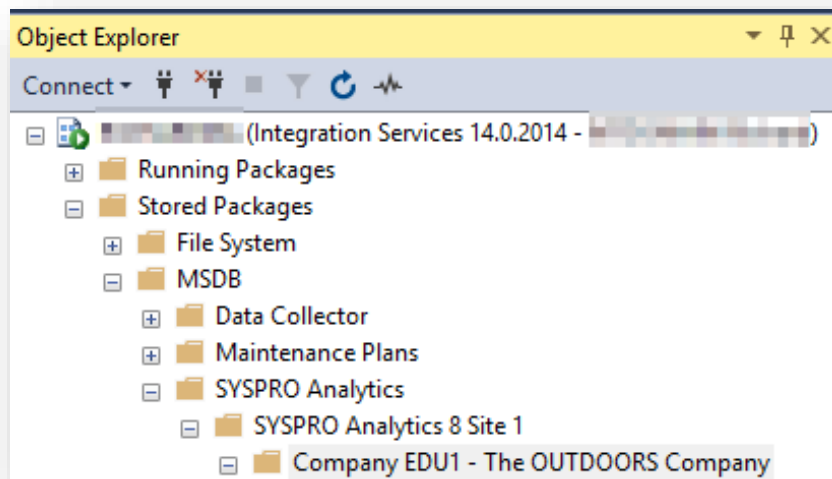
3. Delete the SSIS packages

Each Analytics site is updated by one or more SQL Server Agent jobs and multiple SSIS packages.
Therefore, when deleting a site you will be prompted to delete the SSIS packages for that site.

If you elect not to do this, then you will need to manually delete the SSIS packages as follows:

- Load **SQL SERVER MANAGEMENT STUDIO** as administrator and connect to the SQL Server Integration Server.
- Browse to the site folder and action either of the following depending on the contents:
 - If the site contains multiple companies:
Only delete the company folder required for deletion.
 - If there is only one company contained within the site:
Delete the site folder.

For example:



- Clean up the SQL Server agent jobs by deleting all job steps that execute SSIS packages for the company that you are deleting.



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