

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.

2020-R2

SYSPRO Avanti Software Development Kit

The **SYSPRO Avanti Software Development Kit** lets developers create their own applications that connect to **SYSPRO Avanti**.

A **Microsoft Visual Studio** extension (included in the SDK) provides templates for new projects (and controls used within those projects) together with a number of development productivity features. In addition, the extension allows for debugging of **SYSPRO Avanti** plugins and supports the creation of bespoke cards.

The **SYSPRO Avanti Software Development Kit** supports a variety of use cases, from basic customization and scripting in **SYSPRO Avanti**, to entire embedded applications in the **SYSPRO Avanti** infrastructure.

You can still use VBScript customization for simple user interface customization and automation, but for more complex scenarios the **SYSPRO Avanti Software Development Kit** provides a powerful solution.

The benefits of this SDK over VBScript customization includes:

- Better performance.
- Full development environment of **Microsoft Visual Studio** with productivity extension.

- Intellisense and code completion.
- Live debugging of code with breakpoints.
- Access to the entire **SYSPRO Avanti** API.



Resources will be made available on the **SYSPRO Learning Channel**.

SRS Document Printing in SYSPRO Avanti

Document printing in **SYSPRO Avanti** has been simplified with the addition of new format setup programs that let you view the SRS document options.

You can now define format templates for SRS document printing in **SYSPRO Avanti** :

- AP Check Format for SRS
- AR Permanent Entries Format for SRS
- AR Statement Format for SRS
- AR Discount Cr Dr Notes Format
- AR Dunning Letter Format for SRS
- Inventory Document Format for SRS
- PO Format for SRS
- Inventory Inspection Documents for SRS
- Quotation Format for SRS
- RMA Document Formats for SRS
- SO Document SRS Formats
- WIP Factory Documentation SRS Format
- WIP Inspection Documents Format for SRS

2020-R1

Multiple Tenants for Office 365

The SYSPRO architecture now supports multiple tenants for **Microsoft Office 365**.

A **Microsoft Office 365** tenant is a regional location that provides cloud services dedicated to an organization (e.g. **Exchange Online**, **SharePoint Online**, **Teams**, etc). It falls within the overall **O365 Data Center** and can be seen as an organization's sandbox environment, housing all its digital assets (e.g. users, domains, subscriptions and data).

You can maintain multiple tenants in SYSPRO using the new **Office 365 Tenant Maintenance** program (*Program List > Administration > General Setup*) which stores the information in the `AdmOfficeTenants` system-wide table.

Once configured, you can use SYSPRO's **Personalize** program (*SYSPRO Ribbon bar > Home*) to select the tenant to use when operators communicate with **Microsoft Office 365**.



If you have a single tenant or have already configured your system and operators accordingly, this works unchanged.

SYSPRO Avanti

A host of new capabilities has been added to SYSPRO's web-based platform.

Multi-Factor Authentication

SYSPRO Avanti now supports **Multi-Factor Authentication** (i.e. the process of identifying a user by validating two or more methods of authentication from independent credential categories).

SYSPRO Reporting Services

- Reports can be processed and viewed immediately.
 1. Select **Process report and preview** to view the report as PDF in your default PDF viewer.
 2. Select **Add to print queue** to print the report.



Both options also add the report to the report queue for later viewing.

- Reports can be archived using the **Report Archive** program. Archived reports can be viewed as PDFs and purged using this program.
- Report data can be exported to additional formats (e.g. `xls`, `csv`, `txt` and `xml`).
- Reports with Crystal Report parameters can be processed.

Card builder

This lets you create customized cards based on business objects or `XML` files.

- Design a card from various layout types (e.g. tabs, section headings, carousels, accordions and tables).
- Map XML fields from SYSPRO business objects (or other XML files) to populate fields.
- Define and customize values of XMLIN fields.

Themes

The look and feel of **SYSPRO Avanti** can be changed by applying a theme.

1. Select the **Themes** option from the **User name** field to use a theme.

Keep me signed in

A **Keep me signed in** option was added to the **SYSPRO Avanti Sign in** window which lets users access **SYSPRO Avanti** without needing to supply login credentials.



Logon details are still be requested under certain conditions:

- If your logon credentials change.
- If you are signed out of **SYSPRO Avanti** using the **Sign out** option (instead of just closing the browser).

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.

2019-R2

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.

Support for Large Rich Text Notes


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 location from which implementers can quickly configure SYSPRO modules (and make information easily available to support staff) and significantly speed up the process to resolve issues.

Office 365

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

With **Microsoft Office 365** integrated to SYSPRO, you don't need 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 displayed 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 requiring your response 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 suggested 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 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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