

# SYSPRO 8

## Roaming Users

### *Technical Guide*

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## SYSPRO Help and Reference

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# Introduction to Roaming Users

The majority of SYSPRO systems are configured to run client-server in either a 2-tier or 3-tier configuration. Each client-tier is either a physical Windows PC or a Virtual PC via a Terminal Server.

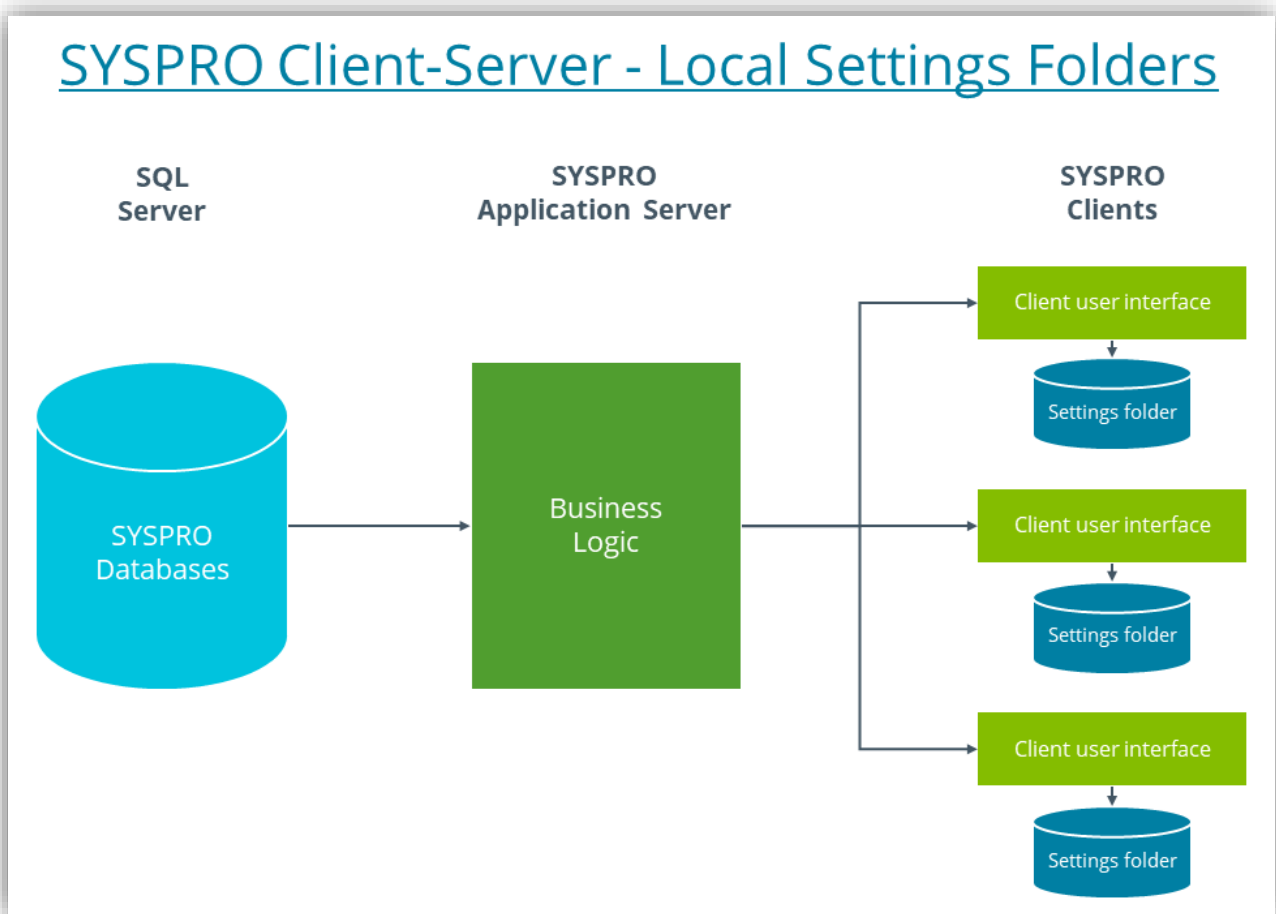
Whether a physical Windows PC or a Virtual PC, the SYSPRO client software reads and saves preferences into a local **'Settings'** folder.


*For example:*

If you move the position of a window or adjust the columns in a listview, the SYSPRO client will persist these settings to a folder on the Windows/Virtual PC called **'Settings'**.

When the user re-loads the same screens in future, the previously persisted settings will be re-read and the screen restored so that the user experience is retained between sessions.

The following diagram shows the client-server configuration, highlighting the separate **'Settings'** folders on each client.





Persisting preferences between sessions is an important factor in providing a good personalized user experience.

However, if the users' regular Windows PC is unavailable for some reason (such as a hardware failure) then, if they were to run SYSPRO via an alternate Windows PC, their own personal '**Settings**' folder will not be available. The SYSPRO client software will then revert to the default look-and-feel and any personalization will be missing.

Similarly, if instead of a Windows PC, a user connects to the SYSPRO client by connecting to a Terminal Server, they will not be guaranteed that the system will be using the same '**Settings**' folder used previously. This will also lead to the SYSPRO client software reverting the user experience back to a default look-and-feel.

The answer to these potential problems is known as **Roaming Users**.



## How does Roaming Users work?

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The concept of **Roaming Users** requires a central repository for each of the local 'Settings' folders. Then when a user logs into Windows (whether a physical Windows PC or connecting to a Virtual PC using Terminal Server), the operating system will ensure that the 'Settings' folder is refreshed from the central repository.

Similarly, when the user logs out of Windows, their local 'Settings' folder will be uploaded to the central repository.

Once configured, the refreshing and uploading occurs automatically.

The outcome when **Roaming Users** has been configured is that, to the user, it does not matter to which client environment they connect; their personalized preferences will always be used.

# How do I setup Roaming Users?

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There are two steps when setting up SYSPRO to work with **Roaming Users**:

1. Setup the Windows Server environment to manage roaming user information.
2. Setup SYSPRO so that the '**Settings**' folder is managed by the Windows roaming user logic.

## SETTING UP ROAMING USERS IN WINDOWS

The concept of configuring Windows to save and restore personalized information between sessions is known as User Data Management.

There are several technologies that can be used to configure User Data Management, such as roaming profiles or folder redirection – and these older technologies can be still be configured successfully to work with SYSPRO.

From Windows Server 2012, a technology called 'user profile disks' has been made available. This is the technology that we will describe in more detail here.

User profile disks store user and application data on a single virtual disk that is dedicated to one user's profile. This works successfully even if you are using pooled virtual desktop environments where user data information is discarded at logoff and the virtual desktop image is rolled back to its initial state.

User profile disks are transparent to the user – users can save their documents to their **Documents** folder (on what appears to be a local drive) and importantly the SYSPRO client can be redirected to save its '**Settings**' folder below the application data folder which will be persisted between sessions.

User profile disks have several advantages:

- Configuration and deployment is simpler than roaming profiles or folder redirection.
- User profiles can be maintained even on pooled virtual desktops that get rolled back after logoff.
- Logon and logoff times are reduced.

- Previously, profiles could be corrupted if used simultaneously on multiple computers. User profile disks are specific to the collection, so they can't be used on multiple computers simultaneously.
- Administrators can have granular control of exactly which locations get saved to the virtual hard disk (VHDX).
- User profile disks can be stored on Server Message Block (SMB) shares, cluster shared volumes, SANs, or local storage.
- In pooled virtual desktop collections, user profile disks work with virtual machines running both Windows 10, Windows 8 and Windows 7 with Service Pack 1 (SP1).

Source: *Some of the information used in this document was sourced from the following article:*

<https://techcommunity.microsoft.com/t5/Enterprise-Mobility-Security/Easier-User-Data-Management-with-User-Profile-Disks-in-Windows/ba-p/247555>

## ROAMING PROFILES AND ALTERNATE SYSPRO SETUP

If you have previously made use of a Windows technology called 'Roaming Profiles', you can continue to use this method to setup Windows to save and restore the SYSPRO **'Settings'** Folder.

This technology is described in a separate technical guide: **SYSPRO – Roaming Users (Legacy)**, available from the **Resources - Technical Guides** section of the SYSPRO 8 Help website.

Note that this document describes an older method of configuring SYSPRO to enable roaming users.

You can use the older method (that requires editing the registry for each client), alternatively you can use the 'system-wide personalization' explained later in this document (i.e. you can use the older technology to configure 'Roaming profiles' but use the new SYSPRO 8 system-wide personalization settings).

If you are setting up Roaming Users for the first time you should consider the newer 'user profile disks' technology described here.



## SETTING UP USER PROFILE DISKS

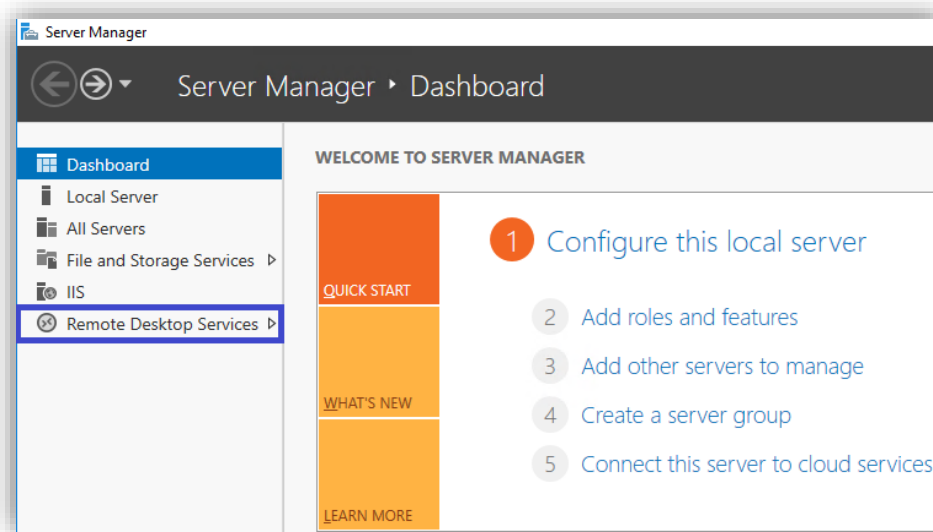
The following is a summary of the steps that can be used to setup user profile disks – the details will depend on your own environment.

### Considerations:

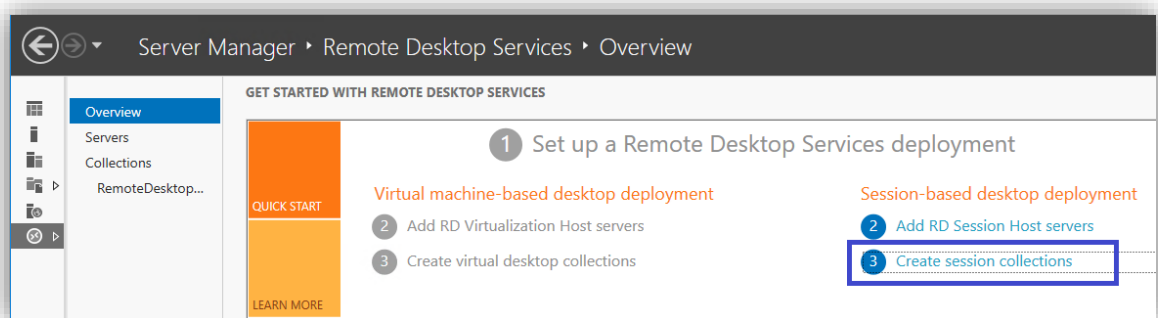
- The screen images were generated on Windows Server 2016 – other versions of Windows may have different dialogs. Please refer to the relevant documentation on the internet to match your server environment.

### Process:

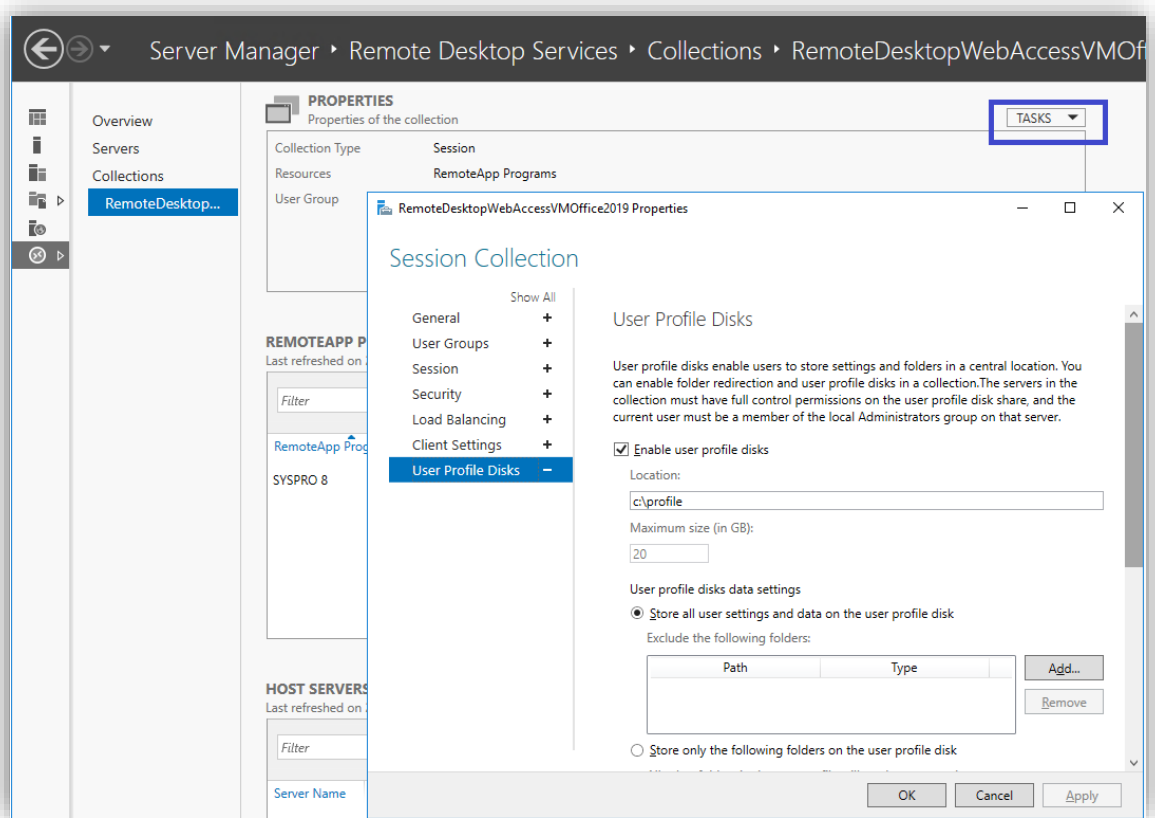
1. Use the **Server Manager** dashboard to configure user profile disks.  
**Note:** Many of the tasks listed below require you to be a domain administrator.
2. If the **'Remote Desktop Services'** menu option (highlighted in blue below) is not available on your dashboard, you should use the **'Add roles and features'** option to enable these services. This will not be covered here



3. Select the **'Remote Desktop Services'** menu option – as per the dialog shown below



4. Use the **'Create session collections'** option and complete the wizard.
5. Once completed you can select the newly added collection from the left-hand sub-menu.  
Click on **'TASKS > Edit properties'** ('TASKS' highlighted in blue below) and complete the **'User Profile Disks'** form.



In our case we will be storing the user profile disks under a folder named: `C:\profile`

Depending on your environment there may be additional steps required that are not covered here.

From then onwards, as each user logs into a Windows PC, the user profile disk (virtual disk) on the server defined above will be uploaded to the Windows PC.

When they log out of Windows their personal settings will be saved back to the user profile disk on the server (and their personal settings are removed from the Windows PC).

When they log into another Windows PC the same process will be followed.

# SETTING UP ROAMING USERS IN SYSPRO

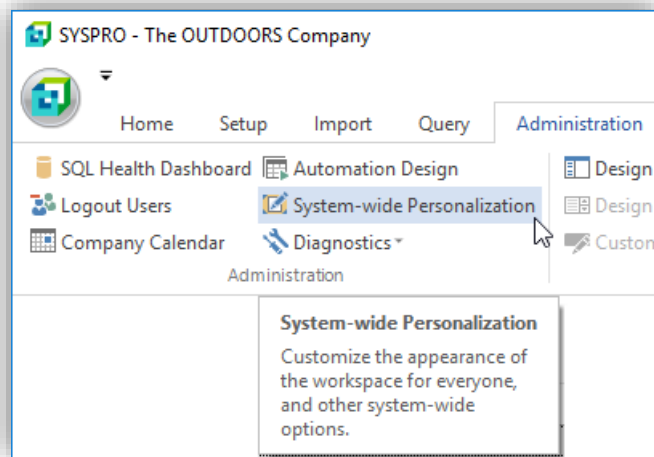
SYSPRO 8 was updated from 2019 R1 (released February 2019) to simplify setting up a **Roaming Users** environment.

*This is the software that will be used in the remainder of this explanation.*

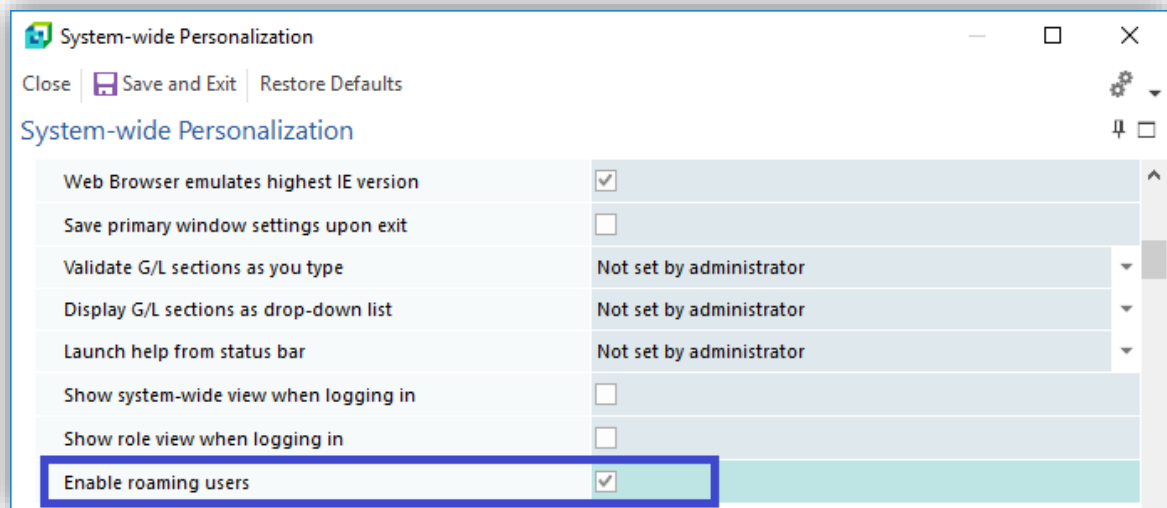
**Note:** Prior to **SYSPRO 8 2019 R1**, the only method of setting up SYSPRO to store its 'Settings' folder in the user's application data folder was to edit a registry entry on each client. This technology is still supported for backward compatibility and is described more fully in the technical guide: **SYSPRO - Roaming Users (Legacy)**, available from the **Resources - Technical Guides** section of the SYSPRO 8 Help website.

### Process:

1. Login to SYSPRO as an administrator and select **System-wide Personalization** from the Menu Ribbon:

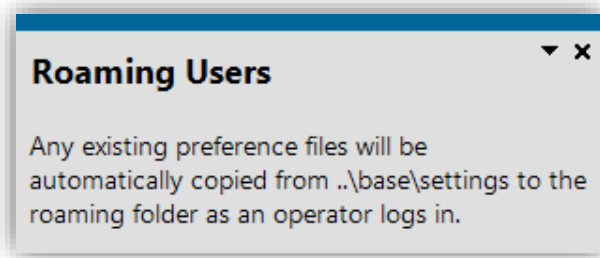


2. Locate the 'Enable roaming users' preference and enable this option:



You will receive a notification that instead of the SYSPRO clients using the 'Settings' folder below the client 'Base' folder, it will be using the user's application data folder.

In addition, if any user had previously persisted 'Settings' below the client 'Base' folder, these preferences will be transferred to the new location when they next login.



When the above 'Enable roaming users' preference has been configured, each SYSPRO client will use the following as the location for its 'Settings' folder:

`C:\Users\{User}\AppData\Roaming\SYSPRO\Settings`

Where '{User}' is the user name used to login to Windows.

When a user logs into SYSPRO they will receive a message indicating that their preferences have been copied to the roaming profile folder (. . . \AppData\Roaming\SYSPRO\Settings).

This message will only occur once for each user:





Once configured, the Roaming User logic works as follows:

**1. Login to Windows**

The 'user profile disk' will be restored from a central repository to `C:\Users\{User}`. This includes the SYSPRO client '**Settings**' folder.

**2. Login to SYSPRO**

The SYSPRO client will read personal preferences from the '**Settings**' folder from point 1.

**3. SYSPRO application usage**

The user performs transactions and other SYSPRO functions which could include changing personal preferences.

Some of these are immediately persisted to the '**Settings**' folder.

**4. Logout of SYSPRO**

The SYSPRO client will persist any outstanding personal preferences to the '**Settings**' folder.

**5. Logout of Windows**

The Windows user and application data, including the '**Settings**' folder used by the SYSPRO client, will be saved to the central repository as a 'user profile disk'.

**Note:** SYSPRO may still create temporary files in the original `Base\Settings` folder – however these are not required to be persisted between sessions and do not form part of the **Roaming Users** logic.



## AFRICA

### **SYSPRO South Africa**

Block A  
Sunninghill Place  
9 Simba Road  
Sunninghill  
Johannesburg  
2191  
South Africa  
Tel: +27 (0) 11 461 1000  
Email: info@za.syspro.com

### **SYSPRO South Africa**

Block A  
Lagoon Beach Office Park  
Cnr Marine & Boundary Rd  
Milnerton  
Cape Town  
7435  
South Africa  
Tel: +27 (0) 21 552 2220  
Email: info@za.syspro.com

### **SYSPRO South Africa**

4 Nollsworth Crescent  
Nollsworth Park  
La Lucia Ridge  
La Lucia  
Durban North  
4019  
South Africa  
Tel: +27 (0) 31 566 4240  
Email: info@za.syspro.com

### **SYSPRO East Africa**

Ground Floor – Office No.1 E  
Panari Sky Centre  
Mombasa Road  
Nairobi  
Kenya  
Tel: +254 720 909 644  
+254 720 909 530  
Email: info@za.syspro.com

## ASIA-PACIFIC

### **SYSPRO Australia**

Suite 1102, Level 12  
201 Miller Street  
North Sydney  
NSW 2060  
Australia  
Tel: +61 (2) 9870 5555  
Toll free: +1 300 882 311  
Email: info@au.syspro.com

### **SYSPRO Australia**

1/14 Business Park Drive  
Notting Hill  
Victoria  
Melbourne  
3168  
Australia  
Tel: +1300 882 311  
E-mail: info@au.syspro.com

### **SYSPRO Asia**

8 Eu Tong Sen Street  
#19-91 The Central  
Singapore  
059818  
Tel: +65 6256 1921  
E-mail: info@sg.syspro.com

## CANADA

### **SYSPRO Canada**

4400 Dominion Street  
Suite 215  
Burnaby  
Vancouver  
British Columbia  
Canada  
V5G 4G3  
Tel: +1 (604) 451 8889  
Toll free: +1 888 259 6666  
Email: info@ca.syspro.com

### **SYSPRO Canada**

5995 Avebury Road  
Suite 902  
Mississauga  
Toronto  
Ontario  
Canada  
L5R 3P9  
Tel: +1 905 502 5502  
Email: info@ca.syspro.com

### **SYSPRO Canada**

6080 Young Street  
Suite 1002  
Halifax  
Nova Scotia  
Canada  
B3K 5L2  
Tel: +1 902 423 1256  
Toll free: +1 866 979 7776  
Email: info@ca.syspro.com

## EUROPE

### **SYSPRO United Kingdom**

Baltimore House  
50 Kansas Avenue  
Salford Quays  
Manchester  
United Kingdom  
M50 2GL  
Tel: +44 161 876 4498  
Email: info@uk.syspro.com

## USA

### **SYSPRO USA and Americas**

959 South Coast Drive  
Suite 100  
Costa Mesa  
California  
92626  
USA  
Tel: +1 (714) 437 1000  
Toll free: +1 800 369 8649  
Email: info@us.syspro.com

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