

# A Guide to Updating to 2021 R1

SYSPRO 8

Published: February 2022



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# Quick Guide: Updating to SYSPRO 8 2021 R1

This article covers important points to note when updating to **SYSPRO 8 2021 R1**, as well as a few tips and tricks to make the process easier.

The areas covered include:

- SYSPRO Installer Application update process
- Reduced file system usage
- Licensing Changes
- Enhanced Diagnostic Capabilities
- SYSPRO Cloud ERP Service Accounts
- SYSPRO Installer Application 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 2021 R1** 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**. Therefore, when you select to proceed, you are routed to the **SYSPRO Reporting Software** screen from where you can first uninstall **SAP Crystal Reports 2013**, and then 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.

You are now ready to start using **SYSPRO 8 2021 R1**.

# Reduced file system usage

## SRS Document Printing

During the **SYSPRO 8 2020 R2** release, the *custom* SRS Document Print XML control files were migrated to **Microsoft SQL Server** as part of the initiative to reduce file system usage.

Continuing on this journey, the setup and printing processes for SRS Document Printing is now optimized to reduce file persistence and address the overhead of loading the control information into memory when using SRS Document Printing.

The *standard* SRS Document Print XML control files and templates are now loaded into a set of three global SQL temporary tables for each instance of SYSPRO as they are required:

- Standard document types
- Standard document samples
- Available archive fields

In addition, the SRS Document Print programs that read the control files are now SQL-optimized for faster retrieval and updating of data. This improves performance, eliminates the use of in-memory collections and reduces the scope of resource locks.



The scope of the resource lock is now reduced to only lock the document type that is being maintained and the document that is being maintained or designed (i.e. multiple users can now maintain different document types and different documents at the same time).

# RTF and CMS

As part of the journey to reduce file system persistence, when running **SYSPRO 8 on-premise** you can opt to retain the following RTF and CMS data in the SQL database (instead of the file system):

- RTF notepad documents attached to entities
- CMS Activity body RTF documents
- CMS Activity attachments
- CMS Organization lists

You can migrate these files to your SQL database and vice versa using the **Migrate Files To SQL** program (*Program List > Administration > General Setup*).



Alternatively, you can access this program via the **MIGRATE RTF FILES TO SQL FROM FILE SYSTEM** or **MIGRATE RTF FILES FROM SQL TO FILE SYSTEM** hyperlink against the **RTF AND CMS FILES IN SQL** option in the **Setup Options** program (*Setup Options > System Setup > System-Wide Personalization*). The name of this hyperlink changes depending on the current state of your file storage.

Advantages of moving this data from the file system to the database includes:

- Centralized access to all related data
- Reduction of file system usage
- Simplified portability of data and backup strategy
- Improved performance
- Provision for enhanced scalability in future releases

File locations versus SQL tables

- **RTF notepad documents attached to entities**

File system location: `\Work\Notes`

SQL Database: `{systemdb}` - SQL table: `AdmNotepadData`

- **CMS Activity attachments**

File system location: `\Work\crm_{compid}\activity\attach`

SQL Database: `{companydb}` - SQL table: `CrmActAttachData`

- **CMS Activity body RTF documents**

File system location: `\Work\crm_{compid}\activity\body`

SQL Database: `{companydb}` - SQL table: `CrmActBodyData`

- **CMS Organization lists**

File system location: `\Work\crm_{compid}\list`

SQL Database: {companydb} - SQL table: CrmOrgListDefn

Migrating data from the file system to the database



To ensure that the process completes correctly, the **Migrate Files To SQL** program must be run without any users being connected or processing related documents.

When you run the **Migrate Files To SQL** program to migrate the data from your database to **Microsoft SQL Server**, you are prompted to confirm that you want to start the conversion and, once confirmed, the process proceeds as follows:

1. RTF Notes are migrated into the database:
  - a. A backup folder named Backup\_ccyy\_mm\_dd is created within the \Work\Notes folder on the file system.
  - b. The system retrieves each entry of the **AdmNotepad** table that's flagged as not residing in SQL, records the file name defined and inserts the contents of this file into the **AdmNotepadData** table of the system-wide database.

2. CMS files are migrated into the database:



This process is repeated for each company with the **Contact Management System** module installed.

- a. The system verifies the following:
  - i. The **Contact Management System** module is installed for the company.
  - ii. The data files have not yet been migrated to **Microsoft SQL Server**.



This check allows for a restart if the process previously failed.

- b. Backup folders named Backup\_ccyy\_mm\_dd are created within the \Work\crm\_{compid}\activity and \Work\crm\_{compid}\list folders on the file system.
- c. The migration of the CMS activity bodies and attachments proceeds as follows:
  - i. The system retrieves each entry of the **CrmActivity** table that's flagged as not yet residing in SQL and writes information regarding the body and any attachments linked to the activity to a temporary file.
  - ii. The contents of each file are uploaded to the **CrmActBodyData** and **CrmActAttachData** tables once all entries have been written to the temporary file.





If an activity has multiple attendees, then a copy of the body and attachment rows is written for each attendee. Therefore, the files are only moved to the backup folders once everything has been uploaded.

- d. The migration of the CMS organization lists proceeds as follows:
  - i. The system opens each of the organization lists found in the `\Work\crm_{compid}\List` folder and extracts the information (including the operator, description, etc.).
  - ii. The files are uploaded, and the extracted information is then written to the relevant row in **Microsoft SQL Server**.
3. The relevant rows in the [AdmNotepad](#) and [CrmActivity](#) tables are updated to indicate that the data now resides in **Microsoft SQL Server**.
4. The files are moved to the respective backup folders once they have successfully uploaded.
5. Upon exiting the program, an entry is written to the [AdmSystemAuditLog](#) table indicating if the migration was successful or not.

### Migrating data from the database back to the file system

If you later decide that holding the RTF and CMS data in **Microsoft SQL Server** is not suitable for your environment (e.g. third party applications require access to the files) then you can migrate this data back to the file system by running the **Migrate Files To SQL** program again.

### New environments that require RTF and CMS data to be stored in SQL Server

New on-premise environments will store the RTF and CMS data on the file system by default.

Therefore, if you configure a new SYSPRO environment that requires the data to reside in **Microsoft SQL Server**, you must run the **Migrate Files To SQL** program to perform this migration.

# Licensing Changes

SYSPRO's licensing system has been extended for both **SYSPRO 8 on-premise** and **SYSPRO Cloud ERP** sites.



The **e.net System Manager** is required to access these new modules.

## SYSPRO Ken the BOT

The BOT infrastructure and technology (available as an early adopter product for the past few **SYSPRO 8** releases) is now a purchasable, licensed module.

## Tax Connectors

The following modules are now available for licensing to run in **SYSPRO Avanti** and the core **SYSPRO 8** product:

- Avalara Tax Connector
- Vertex Tax Connector

# Enhanced Diagnostic Capabilities

To assist service personnel in providing speedy resolutions, the diagnostics capability of **SYSPRO 8** has been extended to record a log of identified problems in SQL Server for current and future analysis. A *Black-box* capability has also been introduced to record what was happening on a system prior to failure. Recording the information in SQL is vital for the **SYSPRO Cloud ERP** offering where the file system cannot be used to persist information.

## SYSPRO Run Time Errors

When the SYSPRO Run Time System (RTS) detects a problem, diagnostic files are now written to the `\Work\Diagnostics` folder using a naming convention that includes the date and time. The current contents of the black box are also appended to the existing log, providing a trace of the events leading up to the RTS error.

## SYSPRO64.DLL exceptions & Client-server failures

A single log file per exception or message is written to the `\Work\Diagnostics` folder instead of all exceptions or messages being concatenated into a single file. This simplifies the SQL Server handling of log files on an individual basis and improves the performance during the upload process. It also lets you check each exception or message as an individual record in the [AdmDiagDetail](#) table.

## Micro Focus unhandled exceptions

If an unexpected error occurs in the underlying run time when you log into SYSPRO, the system first verifies whether the `mfdebug.log` file exists in the `\Base` folder before moving it to the `\Work\Diagnostics` folder. The system then creates the new `mfdebug.log` file for the current unhandled exception in the `\Base` folder.

This effectively retains a record of all exceptions instead of just the last example (previously, the original file was overwritten by a subsequent unexpected error).

# SYSPRO Cloud ERP Service Accounts

The introduction of Service Accounts in **SYSPRO Cloud ERP** aims to provide controlled access for selected SYSPRO personnel and partners to assist with various support related tasks like implementation, system configuration and training.

**SYSPRO Cloud ERP** administrators can now designate an operator as a service account, assigning the email address of the support person to the account (the email address is the unique identifying attribute used as part of the cloud authentication).

Although the service account operator can access the **SYSPRO Cloud ERP** environment without affecting the Named User licensing, the local site administrator retains full control over the account (i.e. the service account is treated as a regular user and all the standard access permissions, logging and auditing capabilities are available). These service accounts have no effect on **SYSPRO 8 on-premise** sites.

To implement this feature, the account status of the operator must be enabled within the **Operator Maintenance** program (i.e. the **Service account** option must be enabled), as well as the **SYSPRO Cloud ERP** Active Directory (managed by the **SYSPRO Cloud ERP** team).

# SYSPRO Installer Application Enhancements

The **Utilities** panel lets you download all product files (including hotfixes) to your local SYSPRO Deployment folder.

The download process occurs in the background so you can continue using the **SYSPRO Installer Application**, or close the app and leave the download to continue overnight.



This is useful as it ensures that you have all the required installation files before proceeding with an install.

SYSPRO partners can also use this feature to download and copy product files to a storage device to save time when installing off-site (typically at a customer site with unstable internet connectivity).

The **Utilities** panel also lets you delete downloaded media files, such as product and hotfix files.



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