

A Guide to Updating to 2020 R2

SYSPRO 8

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 **SYSPRO™**

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A Guide to Updating to 2020 R2

This article covers important points to note when updating to **SYSPRO 8 2020 R2**, as well as a few tips and tricks to make the process easier.

The areas covered include:

- Updating to **SYSPRO 8 2020 R2** using the **SYSPRO Installer Application**.
- Upgrading **SYSPRO Reporting Services** to use **SAP Crystal Reports 2016**.
- Understanding the system-wide database growth that will occur when updating due to the reduction in file system persistence.
- Understanding the changed process when creating a new company from **SYSPRO 8 2020 R2** onwards.
- Detailing all of the areas of the product which have changed due to 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**. 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 2020 R2**.

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).

Server-side Reporting

SYSPRO Reporting Services for server-side reporting now uses the following from **SYSPRO 8 2020 R2**:

- SAP Crystal Reports Server 2016 SP8
- SAP BusinessObjects BI platform .NET SDK Redistributable 64bit 4.2 SP8
- SYSPRO 8 Reporting Host Service (64bit)



The **SYSPRO Reporting Services** upgrade is mandatory if you are using server-side reporting.

Please note that the upgrade process can take some time.

Client-side Reporting

The changes to SYSPRO Reporting Services for client-side reporting from **SYSPRO 8 2020 R2** are as follows:

- The Report Designer has been upgraded to use SAP Crystal Reports 2016 SP 8.
- The new client runtime used is SAP BusinessObjects BI platform .NET SDK Redistributable 32bit 4.2 SP8.
- The updated SYSPRO 8 Reporting Components that are installed include the native xml driver and necessary Java runtime.



The **SYSPRO Reporting Services** upgrade is optional if you are using client-side reporting. Therefore, existing customers do not need to roll out the upgrade to all client machines at the same time.

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 (*Ctrl+R > SRSPAL*).

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).

When you enable this option, the process is as follows:

1. When an operator exits SYSPRO, all related operator files located in the `\Base\Settings` folder are compressed and uploaded to the **SysSettings** table of the system-wide database.

Operator files are only uploaded when the operator exits SYSPRO.



The `operator.PRF` file is excluded.

2. When an operator logs into SYSPRO, a check is performed to establish whether there are any related operator settings in the **SysSettings** table of the system-wide database.

If so, the operator settings are restored from **Microsoft SQL Server** accordingly.

Any files that may already exist on the operator's machine are overwritten with the data from the **SysSettings** table of the system-wide database, as the process assumes that the details in the database are the most up-to-date.

3. If SYSPRO terminates abnormally during the current run for the operator, changes made by the operator to the user interface are not saved. When next the operator logs in, the settings

from **Microsoft SQL Server** will override existing files on the operator's machine.

This means that the files in the `\Base\Settings` folder remain and are only removed when the operator exits SYSPRO normally.



Enabling the **PERSIST OPERATOR UI SETTINGS TO SQL** setup option indicates that the next time each operator logs into SYSPRO the system will attempt to retrieve operator settings from **Microsoft SQL Server**.

At this stage there won't be any persisted files, so the previous files in the `\Base\Settings` folder are copied to `\Base\Settings\Backup` and the original files in the `\Base\Settings` folder are used as normal.

When the operator logs out of SYSPRO, the files are uploaded to **Microsoft SQL Server** and used from then onwards.

Note that part of this process saves the previous files from `\Base\Settings` to `\Base\Settings\Backup`. The files in the `\Base\Settings` folder are not deleted. The backup is retained while you are using **SYSPRO 8 2020 R2**. Thereafter (i.e. from **SYSPRO 8 2021 R1**) these files will be deleted.

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.

SRS Reports and Documents

From **SYSPRO 8 2020 R2**, enhancements to SRS architecture cater for the migration of content to the system-wide database:

- Document and report printing
- Report archiving
- Report scheduling
- Report customization

All future custom reports and documents, archived reports and documents and other SRS-related files will be stored in **Microsoft SQL Server**.



All applications that require access to one of these files can then retrieve it using the **COM Retrieve Files Stored on Server** and **Store XML File on Server** business objects.

The custom reports and documents mentioned above are automatically uploaded to **Microsoft SQL Server** during the minor database upgrade to **SYSPRO 8 2020 R2**

In addition, the document archiving architecture has been changed to save the archived documents to the company database when SYSPRO is run in a **SYSPRO Cloud ERP** environment.

The following files are migrated to **Microsoft SQL Server**:

■ **SRS Setup Options**

This refers to the file that stores the setup options for **SYSPRO Reporting Services** per company (previously stored in the `\Base\Settings` folder).

The values will be stored on the following system-wide table:

- [SrsSettings](#)

■ **Document type custom values and selected archive fields**

This refers to the `DocumentMenu_System.XML` file that was previously stored within the `Base\ReportingCustomized\ReportMenu` folder.

This stores any custom values against a document type, as well as selected archive fields (to be used when archiving documents for the type).

The values will be stored on the following system-wide tables:

- Custom document type details = [SrsDocumentType](#)
- Selected archive field details = [SrsDocArchiveSel](#)

■ **Documents**

This refers to all files that were previously stored within the `Base\ReportingCustomized\DocumentControl` folder.

This stores all the documents created by the customer for all document types. The `Documents.xml` file is used for client-side printing and the `Documents_Server.xml` file is used for server-side printing.

The values will be stored on the following system-wide tables:

- Document details = [SrsDocuments](#)
- Document printer details = [SrsDocPrinters](#)
- Document history details = [SrsDocHistory](#)

■ **Document templates**

This refers to all document templates that are created for documents. These templates will be stored in the following system-wide table:

- Document templates = [SrsReporting](#)



The **SRS Documents Template Browse** program (accessed from the **Maintain SRS Document Templates** and **Add SRS Document Templates** programs) lets you browse for templates from the database.

■ Report Customization

This includes the following files (previously located in the `\Base\ReportingCustomized` folder):

- Preferences
- ReportControl
- ReportForm
- ReportMenu
- ReportTemplate
- ReportThemes

The customization values will be stored in the following system-wide tables:

- [SrsReporting](#)
- [SrsSettings](#)

■ Report Archives

This includes all files related to the archiving of SRS reports, previously stored in the `\Base\ReportArchive` folder.

However, if you defined a custom data folder for your `ReportArchive` in your `IMPACT.INI` file against the `IMPDT1` entry, your archived documents are then normally stored in that location. This folder is then also checked when performing the upgrade.

The values will be stored on the following system-wide table:

- [SrsReportArchive](#)



Only the **SRS Report Archive** files may be deferred during the migration of files to the database, if their cumulative size is larger than 500MB.

■ Report Schedules

This includes all files related to report schedules (previously stored in the `\Base\ReportingCustomized\ReportSchedule` folder).

The values will be stored on the following system-wide table:

- [SrsRptSchedule](#)



The `\BASE\ReportingCustomized\BackUpxxxx-xx-xx` folder (where `xxxx-xx-xx` indicates the date) will contain a backup of all the files that have been imported into **Microsoft SQL Server**.

Deferring the Report Archive Import to SQL

The time that the import process takes when running the initial database conversion depends on the number of files to process as well as the size of each file. To reduce the time taken for the upgrade and thus allow work in SYSPRO to proceed with minimal disruption, we have provided a facility that enables you to defer the uploading of the **SRS Report Archive files**.

When you run the database upgrade (which occurs on your initial launch of SYSPRO after updating to **SYSPRO 8 2020 R2**), the system checks the size of the **SRS Report Archive folders**.

- *If the size is less than 500MB:*

You are not prompted with the option to defer the import and the files are uploaded as part of the conversion.

- *If the size exceeds 500MB:*

You are provided with the option to import the files immediately or defer to a later stage.

If you choose to defer this file migration, a row is added to the **SrsReportArchive** table in the system-wide database to indicate that the archived report migration was deferred.

You can then, at a later stage, use the **SRS Import Archive Files to SQL** program (*Ctrl+R > SRSPAL*) to import the contents of the archive folders into **Microsoft SQL Server**.

When you run the **SRS Import Archive Files to SQL** program, it calls the **SRS Query Functions** business object to upload the files to the database. A tickover is displayed during the process that enables you to cancel the upload at any time. Because the system checks for physical files on the system, the upload process can be restarted as required.

Once all of the files have been uploaded to the database, the row that was added to the **SrsReporting** table in the system-wide database is removed.



Reports archived prior to **SYSPRO 8 2020 R2** will not be available for viewing in **SYSPRO Reporting Services** until they have been imported. However, any newly archived reports will be available as they will be archived directly into **Microsoft SQL Server**.

How does this affect users?

Existing reports, menus and forms

Previous customization to reports, forms or menus at a system-wide, company, group, role or operator level, remain intact.



Standard reports, menus, forms, control files and report definition files all remain on the file system.

Creating new reports

You can create a new report in one of two ways:

- From the **New SRS Report** option under the **File** menu of **SYSPRO Reporting Services**, you can use the SYSPRO add-in to save a new report.

By default, this saves the report directly into **Microsoft SQL Server** as `_system` with the relevant control record.

- If you create the report using the standalone version of **Crystal**:
 1. Save the report file into the `\Base\ReportingCustomized\ReportTemplate` folder.
 2. Open **SYSPRO Reporting Services**.
 3. Right-click the folder to which you want to add the report and select the **Add Other Menu Item** option.

The **Add Other Menu Item to xxxx** window is displayed (where 'xxxx' refers to the folder you selected).

4. Select **Crystal driver** at the **Report based on** field.
5. Enter a name for the report at the **Menu item name** field.
6. Select the **Add** option from the toolbar.

The **Report Control** window is displayed.

7. Select the browse icon at the **Report template** field.
Locate and select your saved report file.

8. Save your changes.

The report is then imported into **Microsoft SQL Server**.



The original report file is moved to the `\BASE\ReportingCustomized\BackUpxxxx-xx-xx` folder.

From this point on, the report is edited through **SYSPRO Reporting Services** as changes are not saved to the file system.

Transferring reports between sites

If a consultant creates a report off-site, you can now save the report in **SYSPRO Reporting Services** in one of two ways:

- Use the **Export Report Configuration** tool on the consultant's version of SYSPRO to export the report, form and control file and then import them on the customer's site.
- If the **Export Report Configuration** tool is not available:

1. Save the report file into the `\Base\ReportingCustomized\ReportTemplate` folder.
2. Open **SYSPRO Reporting Services**.
3. Right-click the folder to which you want to add the report and select the **Add Other Menu Item** option.

The **Add Other Menu Item to xxxx** window is displayed (where 'xxxx' refers to the folder you selected).

4. Select **Crystal driver** at the **Report based on** field.
5. Enter a name for the report at the **Menu item name** field.
6. Select the **Add** option from the toolbar.

The **Report Control** window is displayed.

7. Select the browse icon at the **Report template** field.
Locate and select your saved report file.
8. Save your changes.

The report is then imported into **Microsoft SQL Server**.



The original report file is moved to the `\BASE\ReportingCustomized\BackUpxxxx-xx-xx` folder.

From this point on, the report is edited through **SYSPRO Reporting Services** as changes are not saved to the file system.

Transferring documents between sites

The **Maintain SRS Document Templates** program is used to import and export documents (i.e. you can't drop files into the `DocumentTemplate` folder on the file system).

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.

Adding SRS Document Templates

The user interface of the **Add SRS Document Templates** program has changed to improve navigation and usability.

Options that have changed against the **What would you like to do** field include:

- **Copy sample template**

This is essentially the same as selecting `Copy a template` against the **What would you like to do** field and `Sample template` against the **Source file location** in the old UI prior to **SYSPRO 8 2020 R2**.

- **Copy existing document template**

This is essentially the same as selecting `Copy a template` against the **What would you like to do** field and `Existing template` against the **Source file location** in the old UI prior to **SYSPRO 8 2020 R2**.

- **Use existing document template**

This is essentially the same as selecting `Use an existing template` against the **What would you like to do** field and `Existing template` against the **Source file location** in the old UI prior to **SYSPRO 8 2020 R2**.

- **Import template file**

This is essentially the same as selecting `Copy a template` against the **What would you like to do** field and `External template file` against the **Source file location** in the old UI prior to **SYSPRO 8 2020 R2**.



The import function changes the template name during the import process, so there is no way to bring a template into the system with the same name used when designing it externally.

- **Browse for template file**

This is essentially the same as selecting `Use an existing template` against the **What would you like to do** field and `External template file` against the **Source file location** in the old UI prior to **SYSPRO 8 2020 R2**.



This displays a list of all files that have been imported into the database, as files no longer reside in the file system.

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.

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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