

SYSPRO Desktop

SYSPRO 8

Reference Guide

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Starting 133

SYSPRO Desktop

Exploring

Where it fits in?

The **SYSPRO Desktop** is the workspace from which you launch the programs and applications you require or access the key functions you need while working in SYSPRO.

The desktop contains a ribbon bar with the icons that give you quick access to various functions, as well as a number of docking panes that contain the program list, calendar, favorites pane and more.

Things you can do from the SYSPRO desktop include:

- Publish the program list as an HTML file
- Create a flow graph to assist you in your daily procedures
- Create a user-defined list of programs
- Create a menu for a role
- Create shortcuts to SYSPRO programs, reports and other applications
- Configure your own hierarchy of subfolders and programs
- Import a menu
- View HTML pages without having to load an external browser program
- Receive messages from various sources in the system
- Manage appointments, schedules and events
- Schedule tasks for a particular time
- Add items in a to-do list that require your attention
- Add notes while working
- Customize the appearance of the desktop

Starting

Security

Activities

Main Menu - Allow to create system-wide search windows

Controls whether an operator can set **Search Windows** to be available system-wide.

This affects the availability of the **Apply system-wide** option in search windows defined from the Main Menu and in **SYSPRO Reporting Services**.



The **Search Windows** facility is now deprecated and has been replaced by the **Advanced Browse**.

Main Menu - Allow to customize task dialogs

Controls whether an operator can customize task dialogs and show dialogs with single buttons as auto-expiring messages (i.e. toast notifications).

This must be enabled if you are not customizing at role level.

Main Menu - Allow to design flow graphs by role

Controls whether an operator can design flow graphs by role.

If this activity is disabled, but the **Flow Graph - Allowed to design flow graphs** activity is allowed, operators will be able to change their own flow graph but not any flow graphs for a role.

Main Menu - Allow to design menus

Controls whether an operator can create or modify menus on the SYSPRO Desktop (including access to the **Navigation Pane** toolbar functions).

Main Menu - Allow to publish menu as HTML

Controls whether an operator is able to publish the main menu as an HTML file.

This is to prevent unauthorized access to system files when browsing for a location to save the web menu.

Main menu - Customize options

Controls whether an operator can access the **Personalize** function to configure desktop settings.



This option only takes effect the first time the operator logs into SYSPRO after the activity was set to either allowed or denied.

Main menu - MDI functionality

Prevents an operator from launching programs from the SYSPRO menu at the same time that another SYSPRO program is already loaded.

This avoids the situation where, for example, the same dispatch note is maintained simultaneously (**Dispatch Note Maintenance**) by different operators leading to duplicate dispatch invoices.

Main menu - 'Run any program' function

Controls whether an operator can launch a SYSPRO program by selecting the **Run a program** option from the **SYSPRO Button**, or by pressing **CTRL+R** from within the SYSPRO Main Menu.



This option only takes effect the first time the operator logs into SYSPRO after the activity was set to either allowed or denied.

Main menu - Run new SYSPRO instance

Controls whether an operator can select the **New SYSPRO instance** option from the **SYSPRO Button** of the SYSPRO Main Menu.



A change to this activity is only recognized when the operator logs out of SYSPRO and then back into SYSPRO.

Solving

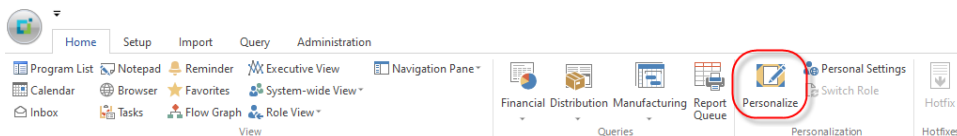
FAQs

How do I hide or show the Ribbon bar?

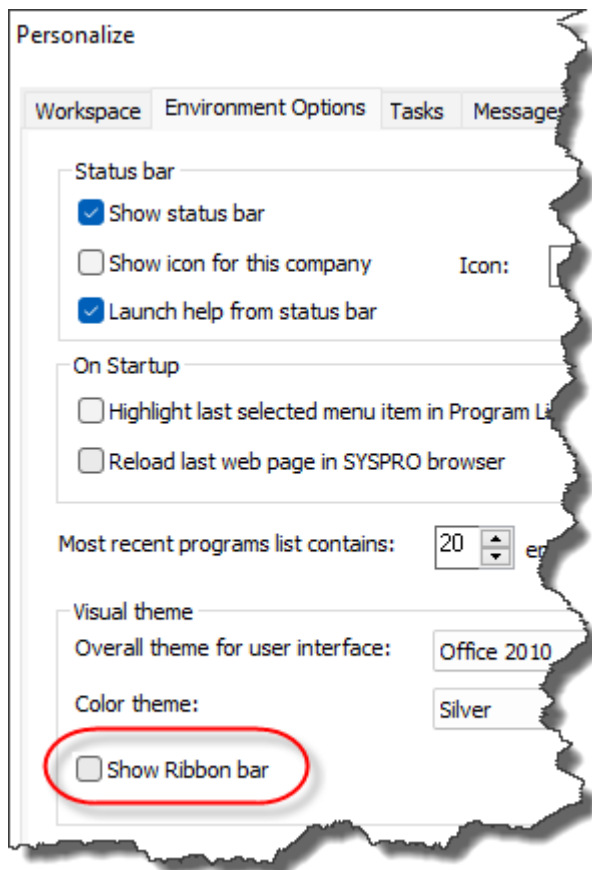
You control how to display SYSPRO's Ribbon bar using the **Personalize** program (run from the main menu).

To hide the Ribbon bar

1. Select the **Personalize** function from the Ribbon bar:



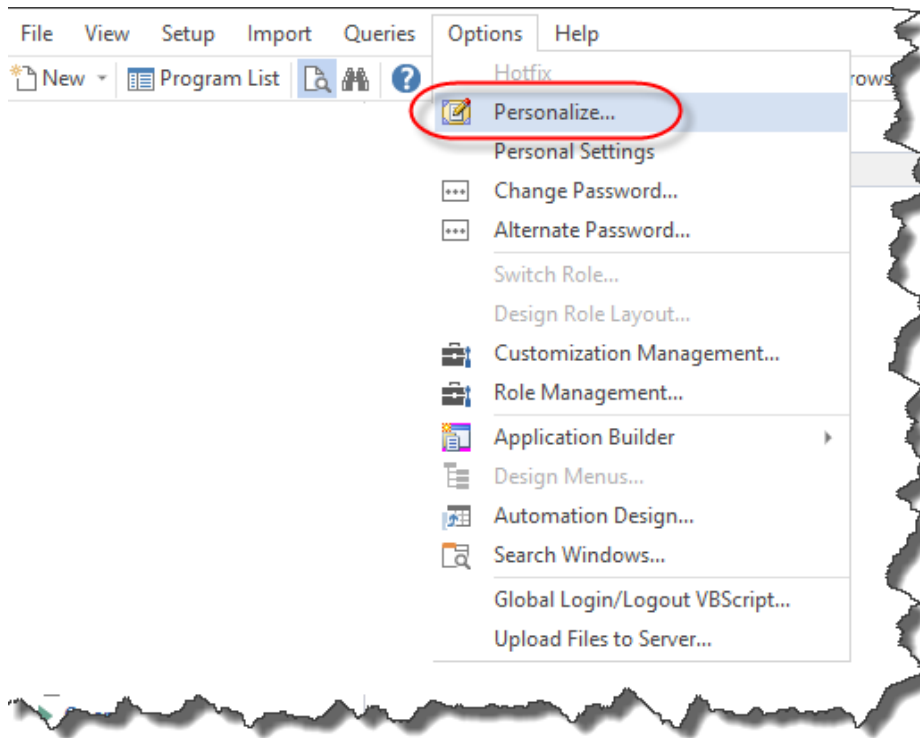
2. Select the **Environment Options** tab and deselect the **Show Ribbon bar** option:



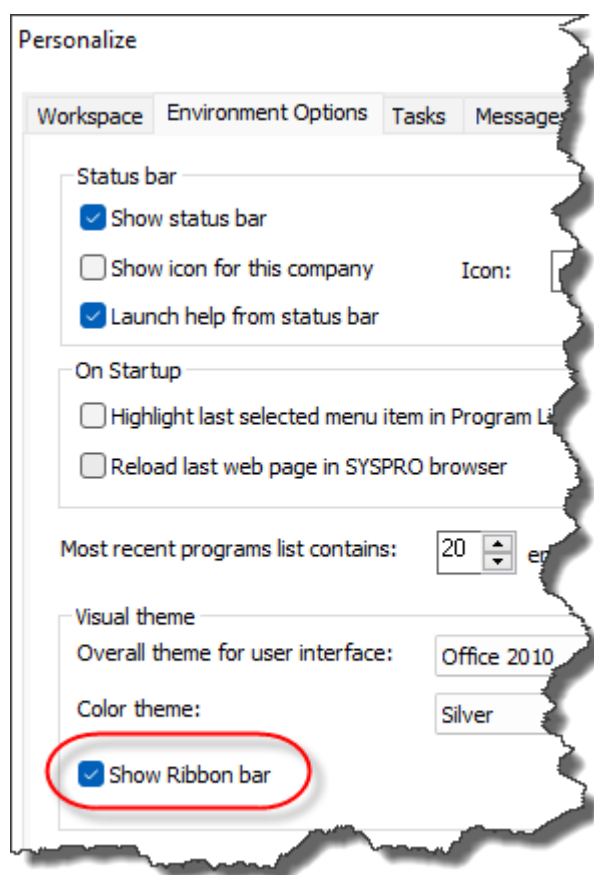
3. Select **Apply** to keep this setting until you next change your selection. Alternatively, select **OK** to apply the change only for this run of SYSPRO.

To show the Ribbon bar

1. Select the **Personalize** function from the **Options** menu bar:



2. Select the **Environment Options** tab and enable the **Show Ribbon bar** option:



3. Select **Apply** to keep this setting until you next change your selection. Alternatively, select **OK** to apply the change only for this run of SYSPRO.

Browser

Exploring

Where it fits in?

The **Browser** SYSPRO Desktop function lets you view HTML pages from within SYSPRO, without having to load an external browser program.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Starting

Security Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

SYSPRO Browser - Manual URL address entry

Controls whether an operator can use the **File Open** option to manually enter an URL address when using the SYSPRO browser or to enter a URL address by selecting the Browse icon.

When denied, the operator cannot access the Internet using the following:

- The **RW XML Report Viewer** program.
- The **GL XML Report Viewer** program.

Using

Hints and Tips

- You can link directly to the Internet and view pages on-line from within SYSPRO itself.
- You can access HTML pages residing on your local drive (e.g. to pre-design your own visual representation of a process or system and then configure hyper links to launch association executables such as SYSPRO programs or third-party applications).
- If you have customized your main menu and published it in HTML format (using SYSPRO's Web Menu Wizard) then you can use the Browser to view this menu and launch SYSPRO programs.
- Within any SYSPRO screen that is constructed using listview controls (e.g. browse programs) you can press **CTRL+F7** to output the contents of that screen to your default browser. You can then save this file (which is in HTML format) to a location on your hard drive for later retrieval within the SYSPRO Browser.

Calendar

Exploring

Where it fits in?

The **Calendar** SYSPRO Desktop function lets you manage appointments and schedules, receive reminders, change the look of the calendar, and integrate to Microsoft Outlook.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Using

Hints and Tips

- You can also display the calendar by hovering the mouse pointer over the **Calendar** tab that is docked to the desktop.
- By default, the calendar grid appears with a timescale of 30 minutes. You can increase or decrease this scale, depending upon what you want to see. The available time periods are 5, 10, 15, 30 and 60 minutes.
- The **Date picker** allows you to select whether you want to view a day, a week, or a month at a time in your SYSPRO calendar.

Referencing

Toolbar

- The calendar contains a toolbar that can be used to change to a single day view, a five day view or a monthly view. You can use the Today button to return to the current system date.
- When displaying a single day, the slider bar on the right of the screen only allows you to move up and down the currently selected date, and when displaying five days you can only see those days.
- When displaying the whole month, the slider bar can be used to move forward or back a full year. If you need to go further than this you can use the arrows that appear at the top/bottom of the slider bar. To return to the current date, click on the Today button before returning to the 1 or 5 day view.

Appointments and Events

- Appointments are activities that you schedule in your calendar. These appointments do not include inviting others.
- You can indicate how your calendar looks to others by selecting the time an appointment represents as busy, free, tentative or out of office.
- You can schedule recurring appointments, and choose to view them by day, week, or month. An event is an activity that lasts 24 hours or longer. Examples of events include a trade show, a holiday, or a conference. Usually an event occurs once and can last for one day or several days, but an annual event, such as a birthday or anniversary, occurs annually on a specific date. Events and annual events do not occupy blocks of time in your calendar; instead, they appear in banners.
- An all-day appointment displays time as busy when viewed by others, while an event or annual event displays time as free.
- The **Appointment** and **Event Details** entry screen includes text entry fields that enable you to enter the **Subject** and **Location**.
- The **Label** drop down list includes options such as:
 - Important
 - Business
 - Personal
- The **Show time as** drop down list contains:

- □ Free
- Tentative
- Busy
- Out of Office.

You can set the start date / time as well as the end date / time.

- An **All day event** check box removes the time fields and converts this into an event instead of an appointment.
- The **Recurrence** button allows you to specify that this appointment happens **Daily/Weekly/Monthly/Yearly**, and when. A reminder can be set for up to 15 minutes before the event/appointment. Text about the appointment can be entered in the text box and the appointment can also be flagged as Private, meaning that if you are integrated to Outlook the time is blocked out with no details, if other users decide to view your schedule.

Design UI Layouts

Exploring

Where it fits in?

This program lets you design how the SYSPRO user interface must be displayed for operators at role level, system-wide or industry level.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Administration

Starting

Prerequisites

- The **Role layout design** option must be enabled against your operator code (**Operator Maintenance**).

Security

Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Save docking layout when using roles / industry / system-wide

Controls whether operator changes to docking pane layouts are saved when the operator belongs to a role (**Customization Management**). This includes resetting the layouts for an application.

When using roles, changes to your personal view of the role are saved when you exit an application (e.g. pinning and unpinning panes and making changes to the splitter positions).

If access to this activity is enabled, then changes to the personal view of the role made by the operator are retained and displayed the next time the operator accesses that application. The system always attempts to load the operator's own docking layout first followed by any specifically designed role layout.

If access to this activity is denied, then any changes the operator makes to docking pane layouts are ignored once the operator exits the application. The standard role designed layout is restored when next the application is loaded.

Save list view layout when using roles / industry / system-wide

Controls whether operator changes to listview layouts are saved when the operator belongs to a role (**Customization Management**).

If access to this activity is enabled, then the operator can perform the following functions:

- Rearrange and resize columns.
- Remove columns and add them back.
- Apply grouping and sorting to listviews.

These settings are preserved when exiting the application when the user is linked to a role.

In addition, the operator can reset the listview layout, even if roles are in use.

However, if the administrator changes the design of the listview layout for the given role, then the newly-designed layout is automatically applied when the operator re-launches the application.

In other words, the operator can adjust the listview column settings for personal use until such time as the administrator specifically designs that listview layout, when the new layout is applied.

If a listview layout has been designed for the application at role level, then pressing **CTRL+F5** will reset the view to the default role-based layout.

Restrictions and Limits

- While in design mode, the **Navigation Pane** toolbar buttons are disabled, as well as the ability to add or import customized panes to the **Executive View**.
- While in design mode, form values can be saved against the operator or the company, but **not** for a role. This is despite the **Save Form Values as Default** option being available for selection from the context menu (displayed when you right-click on the form).

Role considerations

- Ensure that the role for which you are designing layouts is configured for design at UI level (**Role Management**) and has access to the program you are modifying.
- In a client/server environment, ensure UI design is done on the client machine and not the server. When done on the application server, it does not self-heal to the client.

Staging folder

To minimize interference between someone who is designing for a role and operators for that role already logged in (or about to log in) the system follows a specific processing sequence.

When entering design mode for a role:

1. The system deletes all the files for the role from the `Role` folder on the client.
2. The system copies all files for the role from the server to the client (this ensures that the designer is using the latest set of UI layout files).
3. The files are copied to the `Role_###` staging folder on the client. This staging folder is created in the `\Base\Settings` folder.



If the system exits unexpectedly during design mode, the files in the staging folder remain untouched. When that operator logs back into SYSPRO, the system prompts whether the operator wants to resume



editing for that role. The operator will need to enter design mode for the role before the files for the role are copied to the `Role_###` folder.

When exiting design mode for a role:

1. The system creates a temporary file in the `Role_###` folder on the server.
2. The file serves as a folder lock for that role (i.e. users will be unable to login using that role until the copy process is complete and the temporary file removed).
3. When self-healing executes, then all files in the `Role_###` folder are removed and the files are copied from the server to the client.
4. If any file is not successfully copied across from `Role_###` to the correct `Role_` folder on the server, then a message is given and the `Role_###` folder on the client machine is not removed. If this happens, you should check permissions on the target folder.

System-wide considerations

- Only programs that have been changed in system-wide design mode are locked down for the user.

For example: If the administrator only adjusts how the **Customer Query** program works, then only files for that program will appear in the `Role_XXX` folder (where `xxx` indicates the layout code) and only that program cannot be further adjusted by the user. When loading SYSPRO, the system scans the layout and script files stored in the `Role_SYS` folder to see which programs have been adjusted. An internal table is created containing a list of all the programs for which layout changes have been made. Any program listed is automatically locked down.

- Despite a program being locked down, you can still adjust the overall appearance of the user interface if you have enabled the **Save docking layout when using roles** operator activity.

Similarly, you can adjust columns in a list view if you have enabled the **Save list view layout when using roles** operator activity. In both cases, changes are only applied until the administrator next adjusts the docking or list view layouts in system-wide design mode.

A version number is stored within the docking and list view layout files and if it doesn't match the version number saved in the user's definition file, then the administrator's changes are re-applied. The user definition files are saved on the client machine and named as follows:

- For docking layouts: `\Settings\Dock_operator_XXX_ARSPENLZ.XML`
- For list view layouts: `\Settings>List_operator_XXX_ARSPENLV.XML`
- When designing for the Application Builder 1 programs, the application title is saved in the `Role_XXX` folder.

Other considerations

VBScript considerations

- VBScript files that are created or maintained during design mode are saved in the `Role_XXX` folder in `\Base\Settings` (where `xxx` indicates the layout code). This differs from roles where scripts are saved to the `\Work\VBScripts` folder. You can create the folder offline and then deploy it at a site.
- You cannot edit VBScripts for tiles or flow graphs while in design mode.

Self healing

- Permissions and activities are never self-healed as they are read from the server.
- UI layouts by role designed on the server are not self-healed to the client.

Toolbars

- You must use the **Customize** mode to customize a toolbar. Simply removing buttons from the toolbar does not save the changes when done in Design mode. Right-click the toolbar and select **Customize** from the context menu.
- The **Show List view Toolbar** option (available from the `CTRL+F1` submenu, or right-click the header row of any list view) is saved at operator level, which means that the operator can override the Design mode setting for this option.

Referencing

Design Layout

Field	Description										
Design layouts by	System-wide and Industry design layouts apply to User Interface locking only. All other non-role securities such as Operator and Operator Group settings are assumed.										
Role	Design layouts for a specific role. You can capture details for a new role using the Add a Role function.										
System-wide	Design layouts that will be deployed to every operator in all SYSPRO companies. You can use the Industry layout to design layouts per company. System-wide layouts only apply to operators who do not belong to any role.										
Industry	Design layouts for a specific industry. <table border="1"> <tbody> <tr> <td>Edit</td> <td>Changes details for an existing industry.</td> </tr> <tr> <td>Add</td> <td>Captures details for a new industry.</td> </tr> <tr> <td>Industry code</td> <td>A three-character industry code in the range A-Z.</td> </tr> <tr> <td>Title</td> <td>A title to identify the industry.</td> </tr> <tr> <td>Companies</td> <td>A list of companies you want to associate with the industry (separate companies by a semi-colon). Each company can only be associated with one industry (i.e. you cannot enter a company id that has been used in another industry code).</td> </tr> </tbody> </table>	Edit	Changes details for an existing industry.	Add	Captures details for a new industry.	Industry code	A three-character industry code in the range A-Z.	Title	A title to identify the industry.	Companies	A list of companies you want to associate with the industry (separate companies by a semi-colon). Each company can only be associated with one industry (i.e. you cannot enter a company id that has been used in another industry code).
Edit	Changes details for an existing industry.										
Add	Captures details for a new industry.										
Industry code	A three-character industry code in the range A-Z.										
Title	A title to identify the industry.										
Companies	A list of companies you want to associate with the industry (separate companies by a semi-colon). Each company can only be associated with one industry (i.e. you cannot enter a company id that has been used in another industry code).										



Field	Description
Start Design Mode	Displays the Design Mode in Progress window for you to begin designing UI Layouts. Open a program you want to modify and make your changes. Repeat this process for each program you want to change.

Executive View

Exploring

Where it fits in?

The **Executive View** SYSPRO Desktop function lets you create your own view of information within SYSPRO using various graphical components such as graphs, list views, web applications, etc.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Starting


Security

Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

VBScript editing / Design Web Views / Design Customized Panes

Controls whether an operator can edit VBScripts or change customized panes.

It also controls whether an operator can access the Visual Designer program (displayed from the sub menu of the  icon).

This does not apply to importing customized panes, which is controlled by the **Allow to import customized panes** activity.

Allow to import customized panes

Controls whether an operator can import customized panes into any application with a docking layout when the operator does not belong to a Role.

This includes using the **Click to Import Customized Panes** function of the **Executive View** pane.

Restrictions and Limits

- You can't add or import customized panes while in **Design mode**.

Referencing

Executive View

Field	Description						
Click to Add Customized Pane	This loads the Customized Pane Editor program for you to create your own customized pane comprising various graphical components such as graphs, list views, web applications (e.g. Crystal Xcelsius charts), etc. These views can be defined using built-in templates or constructed as required using VBScripting.						
Click to Import Customized Panes	<p>This loads the Customized Pane Editor program to import a customized pane associated with a docking pane.</p> <table border="1"> <tbody> <tr> <td>Import file name</td> <td>Indicate the name of the file (including the full path) for the customized pane you want to import.</td> </tr> <tr> <td>Import</td> <td> <p>This imports the customized pane.</p> <p>The current docking pane layout is reset before the new customized pane is imported.</p> <p>The imported customized panes are always added to your existing docking pane layout. Therefore, if you import more than once, the program will continue to add the imported customized panes to your docking pane layout.</p> </td> </tr> <tr> <td>Cancel</td> <td>This returns to the previous screen without importing a pane.</td> </tr> </tbody> </table>	Import file name	Indicate the name of the file (including the full path) for the customized pane you want to import.	Import	<p>This imports the customized pane.</p> <p>The current docking pane layout is reset before the new customized pane is imported.</p> <p>The imported customized panes are always added to your existing docking pane layout. Therefore, if you import more than once, the program will continue to add the imported customized panes to your docking pane layout.</p>	Cancel	This returns to the previous screen without importing a pane.
Import file name	Indicate the name of the file (including the full path) for the customized pane you want to import.						
Import	<p>This imports the customized pane.</p> <p>The current docking pane layout is reset before the new customized pane is imported.</p> <p>The imported customized panes are always added to your existing docking pane layout. Therefore, if you import more than once, the program will continue to add the imported customized panes to your docking pane layout.</p>						
Cancel	This returns to the previous screen without importing a pane.						

Favorites

Exploring

Where it fits in?

You use the **Favorites** SYSPRO Desktop function to add shortcuts to your most frequently used SYSPRO programs, reports and other applications.

It operates as a sophisticated task panel that supports an unlimited number of categories to group your favorite programs, and tiles to launch these applications.

The tile can be used as a placeholder to display images and information, and a refresh time can be set against individual tiles so that the displayed values are updated on a regular basis.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Starting


Security

Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

VBScript editing / Design Web Views / Design Customized Panes

Controls whether an operator can edit VBScripts or change customized panes.

It also controls whether an operator can access the Visual Designer program (displayed from the sub menu of the  icon).

This does not apply to importing customized panes, which is controlled by the **Allow to import customized panes** activity.

Restrictions and Limits

- Tiles on the **Favorites** pane cannot be controlled by roles.

Using

Hints and Tips

- You can drag any program or menu item between your favorites task pane, recent programs list, personal menus and the program list.
- By default, a **Tutorials Player** window is displayed as an item on the **Favorites** pane. This enables you to embed video clips within SYSPRO that can be deployed across your organization (e.g. as learning aids).
- When copying a tile with images to another workstation, ensure that you copy the image to the `\Base\Samples` folder of the other workstation.
- Each tile in the **Favorites** pane can be configured to use one or more of the macro events associated with it.


To add a macro event, right-click on a tile and select *Properties > Macro* from the context-sensitive menu.





- To add a favorite, right-click anywhere on the pane and select **New**.

Referencing


Tile functions

Tile functions are available when you right-click on an item in the **Favorites** pane.

Field	Description
Properties	<p>Program Details</p> <p>This lets you view and maintain the details of the program this tile should launch.</p> <p>If no program is linked to the tile (e.g. it is a menu tile, or you created a blank tile) then the Add New Shortcut Wizard program is launched.</p>
	<p>Title</p> <p>Indicate the title that should appear on this tile.</p>
	<p>Tooltip</p> <p>This lets you define a tooltip for the tile that will appear when an operator hovers the mouse pointer over the tile.</p> <p>The tooltip can be text, or an image and can be added programmatically with VBScript (using the <code>Tooltip</code> variable).</p>
	<p>Attach Picture</p> <p>This lets you assign an image to the tile.</p>
	<p>Remove Picture</p> <p>This removes the image currently defined against the tile.</p>
	<p>Action</p> <p>(Navigation Pane only).</p> <p>This lets you set each tile to open another menu (or category) within the Navigation Pane, or to open a flow graph.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p> If you define an action for a program tile (i.e. a tile already set to launch a program) then the tile performs both actions when clicked (i.e. the relevant menu, category or flow graph is displayed and the specified program launches).</p> </div>

Field	Description						
	<p>Item Height</p> <p>This lets you use a slider to set the height of this tile.</p>						
	<p>Auto Fit</p> <p>This lets you automatically resize the tile to display all appearance settings correctly.</p>						
	<p>Macro</p> <p>This opens the VBScript Editor program.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  You cannot launch the program if you are in Design Mode for a role. </div>						
Appearance	<table border="1"> <tr> <td>Icon</td> <td>This lets you assign an icon to be displayed alongside the tile.</td> </tr> <tr> <td>Style</td> <td>This lets you assign a preset style to the icon.</td> </tr> <tr> <td>Color</td> <td> <p>This lets you define a color for the tile.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  This option is not enabled if the No XAML theme is selected from the Style option. </div> </td> </tr> </table>	Icon	This lets you assign an icon to be displayed alongside the tile.	Style	This lets you assign a preset style to the icon.	Color	<p>This lets you define a color for the tile.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  This option is not enabled if the No XAML theme is selected from the Style option. </div>
	Icon	This lets you assign an icon to be displayed alongside the tile.					
	Style	This lets you assign a preset style to the icon.					
Color	<p>This lets you define a color for the tile.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  This option is not enabled if the No XAML theme is selected from the Style option. </div>						
Duplicate Appearance	This lets you apply the tile's appearance settings to all other tiles in the same category.						
Duplicate Height	This lets you set all other tiles in the same category to the height of this tile.						
Delete	This lets you delete the selected tile or category.						
Undo Delete	This restores the deleted tile or category.						
Refresh							

Field	Description	
Export/Import	Export Tile in an Email	This lets you send the tile as an attachment to your email client.
	Save Tile As	This lets you save the file to a specific file location.
	Export Menus	This lets you indicate the menus you want to export.
	Import Tile	This lets you deploy a tile from a saved file.
	Import Menus	This lets you deploy a menu from a saved file.
New	Program Tile	This lets you create a new tile within the current category and launches the Add New Shortcut Wizard program.
	Menu Tile	(Navigation Pane only). You will be prompted to define an action for this tile. It can navigate to another menu in the Navigation Pane (and a category within that menu) or open a flow graph.
	Blank Tile	This lets you create a tile as a placeholder for future definition.
	Category	This lets you create unlimited categories to help organize your tiles.
Layout	Appearance	This lets you apply a preset style to the entire Navigation Pane or Favorites.
	Item Width	This lets you adjust the width of all the tiles in the Navigation Pane or Favorites.
	Item Margins	This lets you set the distance between tiles.
	Auto Fit for all Items	This lets you automatically resize all tiles to display all appearance settings correctly.
	Reset Layout	This lets you reset tiles to their default size.
Large Icons	This sets the icons displayed on each tile to a larger size.	

Field	Description
Expand only Selected Category	This only allows one category to be expanded at a time.
Suspend Refresh Events	<p>This lets you stop the refresh events from firing until it is unselected, or until you exit SYSPRO.</p> <div> The next time that you load SYSPRO, this option will have been unselected, and events will fire again.</div>
Show Program Names in Tooltips	This lets you display the program name in tooltips, even if tooltips are not defined.

Flow Graph

Exploring

Where it fits in?

The **Flow Graph** SYSPRO Desktop function lets you create visual representations of the business processes and operating procedures in your organization. These flow graphs assist you in performing your daily procedures and can be used to improve the efficiency and accuracy of the tasks to be performed within these procedures.

You create flow graphs in the **Flow Graph** pane by adding shapes and connecting them together in a flow. You can define these shapes to call a SYSPRO program, Report Writer report, Net Express program, 3rd party application, or SRS report. You can also use VBScripting to perform tasks such as calling a business object, changing the status of a shape, or writing an entry to a database.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Flow graphs can be designed per role using the **Design Flow Graphs** program (*SYSPRO Ribbon bar > Administration*).

Starting

Security Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Allow to design Flow Graphs

Controls whether an operator can activate **Design Mode** within the **Flow Graph** pane.

If this activity is disabled, then operators cannot change their own flow graph or flow graphs by role, regardless of the setting against the **Main Menu - Allow to design flow graphs by role** activity, as the **Design Flow Graphs** option on the Administration tab of the Ribbon Bar will be disabled.

Main Menu - Allow to design flow graphs by role

Controls whether an operator can design flow graphs by role.

If this activity is disabled, but the **Flow Graph - Allowed to design flow graphs** activity is allowed, operators will be able to change their own flow graph but not any flow graphs for a role.

Role considerations

- If you access SYSPRO as a role-based operator, the list of flow graphs created for this role are displayed in the **Flow Graphs for Role** pane.

Other considerations

Apply XAML Markup considerations

- You can manipulate the shape beyond the capabilities of the **Shape Properties** pane by using the **Apply XAML Markup** option.

This option opens the XAML Markup Editor that can be used to change the markup code.

Home flow graph considerations

- When a flow graph is created for the first time it is automatically saved in the `Base\Settings` folder with the default flow graph name for this operator code - `Flow_OperatorCode_IMPMLV_00.XML`.

Using

Hints and Tips

Deploying the flow graph

- The VBScript created for a flow graph is saved in the flow graph `.xml` file. You can email the file to another person or organization and it should work correctly (i.e. no additional files are required).

Defining system-wide shapes

- To define system-wide defaults for shapes, right-click on a shape within the shapes pane and select **Default Appearance**.

Adding SYSPRO programs to the flow graph

- SYSPRO programs can be added to the flow graph by dragging them from the SYSPRO menu (under the **Program List** pane) and dropping them on the flow graph desktop. They can also be dragged from the **Recent Programs** section under the **Navigation Pane**.
- You can also use the **SYSPRO Program** shape to add programs to the flow graph. Using this shape calls up the **Add New Shortcut Wizard**.

Grouping shapes

- When in design mode, shapes can be grouped together by lassoing them. Another way is to click on the first item, then hold down the **CTRL** key and click on all the other shapes you want grouped. Dragging one of the highlighted shapes will move all the shapes together.

Referencing

Toolbar

Field	Description
Home	This lets you return to your home flow graph after moving away from it to another flow graph during the current run of SYSPRO.
Options	<p>New Flow Graph</p> <p>This lets you create a new flow graph.</p> <p>This option is only available in design mode.</p>
	<p>Open a Flow Graph</p> <p>Select the flow graph to be opened.</p> <p>If any changes were made to the previous flow graph, then these changes are saved automatically before the one you selected is opened.</p>
	<p>Save</p> <p>This lets you save the information in the current flow graph to a file with the current name. Select Save As to enter the name of the flow graph.</p>
	<p>Save As Home Flow Graph</p> <p>Display your default flow graph (<code>\settings\Flow_operator_IMPMLV_00.xml</code>).</p>
	<p>Save as Image</p> <p>Save the flow graph as a .png image in your <code>Base\Settings</code> folder.</p>
	<p>Email</p> <p>This lets you create an email message, and attach the current flow graph's XML file.</p> <p>When a flow graph is emailed it will contain all the pages within this flow graph.</p> <p>You need to enable the Fax/mail integration required option against the operator to use this function.</p>
	<p>Recent Flow Graphs</p> <p>Select a flow graph from a list of the last 10 flow graphs that you accessed.</p>

Field	Description										
	<p>Templates</p> <p>Open a sample flow graph from which to construct new flow graphs. To enable design mode for a sample template you need to select Save As Home Flow Graph.</p>										
Edit	This option is only available in design mode.										
Align	<p>This option is only available in design mode.</p> <p>You need to select more than one item on the flow graph to use these options. Items can be selected individually while pressing the CTRL key and using the mouse pointer to click on them. Alternatively they can be grouped by lassoing them with the mouse pointer.</p> <table border="1"> <tbody> <tr> <td>Align</td> <td>This aligns multiple shapes to the left, right, top or bottom edge of the first shape selected.</td> </tr> <tr> <td>Same Width</td> <td>This resizes multiple shapes to the same width as the first shape selected.</td> </tr> <tr> <td>Same Height</td> <td>This resizes multiple shapes to the same height as the first shape selected.</td> </tr> <tr> <td>Same Size</td> <td>This resizes multiple shapes to the same width and height as the first shape selected.</td> </tr> <tr> <td>Uniform spacing Top/Bottom</td> <td>This evenly realigns multiple shapes.</td> </tr> </tbody> </table>	Align	This aligns multiple shapes to the left, right, top or bottom edge of the first shape selected.	Same Width	This resizes multiple shapes to the same width as the first shape selected.	Same Height	This resizes multiple shapes to the same height as the first shape selected.	Same Size	This resizes multiple shapes to the same width and height as the first shape selected.	Uniform spacing Top/Bottom	This evenly realigns multiple shapes.
Align	This aligns multiple shapes to the left, right, top or bottom edge of the first shape selected.										
Same Width	This resizes multiple shapes to the same width as the first shape selected.										
Same Height	This resizes multiple shapes to the same height as the first shape selected.										
Same Size	This resizes multiple shapes to the same width and height as the first shape selected.										
Uniform spacing Top/Bottom	This evenly realigns multiple shapes.										
Design Mode	<p>Place the flow graph into design mode, from where you add and modify flow graphs and pages.</p> <p>To exit this mode, select the Design Mode option on the toolbar. Any changes you made to the flow graph are saved as you exit design mode.</p>										
Fit to window	<p>This lets you resize the contents of the flow graph so that it fits the current size of the flow graph pane.</p> <p>If the existing content is too large for the pane, the content is proportionally reduced in size until it just fits. If the existing content easily fits within the pane, all of the content is proportionally increased in size until it just fits within the pane.</p>										

Field	Description
Zoom	<p>This increases or decreases the size of the currently selected shape so that it just fits within the flow graph pane.</p> <p>If multiple shapes were added to a group, then the size is changed so that the group just fits within the flow graph pane.</p>
Set zoom at 100%	Return the flow graph page to its default size.
Enables double-click	<p>This lets you configure the flow graph when not in design mode to require a double-click to invoke the action, as opposed to a single-click.</p> <p>When not in design mode, clicking on a shape launches whichever application, VBScript or action is associated with it. When in design mode, the same functionality is available, but only when you double-click on the shape (so that you can check the functionality without having to exit design mode).</p> <p>Selecting this option toggles the option on/off.</p>
Page	This lets you navigate to other pages in the current flow graph, or type a new page name in the text box to create a new page in the current flow graph.
Back/Forward	<p>The Back button is enabled after you click on a shape that transitions you to another page in the same flow graph.</p> <p>When you select the Back button, the Forward button is enabled so that you can return to the previous page.</p> <p>These buttons are enabled when you navigate between pages by clicking on a shape that is configured to perform a transition.</p>

Context menu

This menu is displayed when you right-click in the flow graph pane. Options are enabled according to your selection.

Field	Description
Properties	<p>Program Details</p> <p>If a program is associated with the selected node item, then the Properties window is displayed from which you can change the name and the icon of the node item, as well as the program that is launched by this node item.</p> <p>If no program is associated with the selected node item (e.g. it is set to transition to another page) then the Add New Shortcut Wizard is displayed enabling you to associate a program with the node item.</p>
	<p>Remove Program Name</p> <p>This lets you remove the associated application from this shape.</p>
	<p>Change Picture</p> <p>This lets you link an image to the shape. This only applies to the Picture shape.</p> <p>If you copy or email the flow graph to another workstation the image may not be displayed on the other workstation. If you attach an image that points to a file in the <code>\Base\Samples</code> folder then the image property is inserted as <code>{samples}\imageName</code> rather than the full path. This is then resolved at runtime to the appropriate <code>\Base\Samples</code> folder on the client machine.</p>
	<p>Action</p> <p>This lets you transition to either another page on this flow graph, or another flow graph.</p> <p>You define the type of action to perform on the Action Settings for Shape window.</p> <p>You cannot apply an action to Table and Table Item shapes.</p>
	<p>Apply XAML Markup</p> <p>This opens the XAML Markup Editor window. XAML markup can be applied to any shape to create another shape.</p>

Field	Description
	Themed Colors This lets you change the color of nodes and node items. A live preview of the changed color is indicated as you hover over the gallery items.
	Duplicate This lets you create a copy of the selected shapes.
Group	Group Selected Nodes This lets you group together the selected shapes, enabling them to be moved as a unit.
	Ungroup Nodes This lets you ungroup the selected shapes.

Field	Description										
Page	<p>Each flow graph has one or more pages. Each page is like its own flow graph. All pages for a flow graph are held within the flow graph XML file.</p> <p>New pages are added to a flow graph by typing their name against the page prompt on the toolbar. When you press the ENTER key, the existing information on the page is cleared and a new page is displayed.</p> <p>When a new flow graph is created, a default page called Primary Page is created within it. This page name can be changed when in design mode by right-clicking on the page background and selecting Page, Title, and replacing the name of the page.</p> <table border="1"> <tbody> <tr> <td>Title</td> <td> <p>Enter the title of the current page.</p> <p>This differs from the Page text field in the pane header in that this renames the current page and does not create a new page.</p> </td> </tr> <tr> <td>Delete</td> <td> <p>This lets you delete the current page.</p> <p>The primary page against a flow graph cannot be deleted, even if its name was changed.</p> </td> </tr> <tr> <td>Show Grid Lines</td> <td> <p>This lets you toggle the grid lines in the flow graph.</p> </td> </tr> <tr> <td>Default Connector Style</td> <td> <p>This lets you select the default connector line style to be applied to the entire flow graph.</p> </td> </tr> <tr> <td>Background</td> <td> <p>This lets you apply a different background color across all pages in the current flow graph.</p> <p>Select Automatic to remove the background color.</p> </td> </tr> </tbody> </table>	Title	<p>Enter the title of the current page.</p> <p>This differs from the Page text field in the pane header in that this renames the current page and does not create a new page.</p>	Delete	<p>This lets you delete the current page.</p> <p>The primary page against a flow graph cannot be deleted, even if its name was changed.</p>	Show Grid Lines	<p>This lets you toggle the grid lines in the flow graph.</p>	Default Connector Style	<p>This lets you select the default connector line style to be applied to the entire flow graph.</p>	Background	<p>This lets you apply a different background color across all pages in the current flow graph.</p> <p>Select Automatic to remove the background color.</p>
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Default Connector Style	<p>This lets you select the default connector line style to be applied to the entire flow graph.</p>										
Background	<p>This lets you apply a different background color across all pages in the current flow graph.</p> <p>Select Automatic to remove the background color.</p>										

Design mode

You create and maintain flow graphs while in design mode.

You drag the shapes found on the **Shapes** pane on to the flow graph pane and connect them to each other using connection points (i.e. input or output points).

You use the options on the **Flow Graph Properties** and **Shape Properties** panes to define the flow graph details.

You can also drag a SYSPRO program from the **Program List** or **Recent Programs** pane and drop it on the flow graph.

When flow graphs are in use each operator has a default flow graph (Home Flow Graph), and these can be linked to other flow graphs. You can transition back and forward between flow graphs, but only one flow graph can be displayed at a time.

Each flow graph must have at least one page, and may contain multiple pages within it. If a flow graph contains multiple pages, you can transition between pages, but only one can appear at a time.

Flow Graph Properties

Field	Description
Properties	<p>Author</p> <p>Enter the name of the person who created the flow graph.</p> <p>This enables you to contact the author to make changes to the flow graph.</p>
	<p>Title</p> <p>Enter a title for the flow graph. This title is visible in the header of the flow graph pane.</p>
	<p>Status</p> <p>Enter text to describe the status of the flow graph.</p>
	<p>Comments</p> <p>Enter comments you want to associate with the flow graph.</p>
	<p>Auto fit to window</p> <p>Specify that the content of the flow graph must be expanded or contracted to fit the size of the flow graph window at the time the flow graph is opened.</p> <p>If the flow graph window size is subsequently changed by the operator it will not cause the flow graph to resize again during the time that it is open.</p> <p>If you transition to another page on either the home flow graph or another flow graph, then the content of the flow graph also expands/contracts to the size of the window.</p> <p>This does not apply to the home flow graph.</p>
	<p>Created</p> <p>This indicates when the flow graph was created.</p>
	<p>Last modified</p> <p>This indicates when the flow graph was last modified and saved.</p>

Field	Description	
Edit restrictions	Restrict editing	Prevent operators from modifying the flow graph. This does not apply to the home flow graph.
	Operators	Enter the operators (separated by semi-colons) who you want to restrict from modifying this flow graph.

Shape Properties

Field	Description	
Appearance	Shape type	This displays details for the shape that is currently highlighted. This field is read only.
	Caption	Enter the text you want to appear as the caption for the shape.
	Tooltip	Enter the text you want to display when the mouse pointer hovers over the shape.
	Caption position	Choose where you want the caption to appear on the shape.
	Font	Select the font to use for the caption.
	Foreground color	Specify the color of the text to use for the caption.
Background	Color	The primary color of the shape.
	Second color	The secondary color here.
	Fill type	Select the style in which the primary and secondary colors should be rendered. If the Fill type is anything other than Solid, the shape will have a gradient that changes from the color specified against the Color field to the color specified against the Second color field. The direction of the gradient is dependent on this option.

Field	Description		
Connections	Connection points	None	This removes all connection points from the selected shape.
		Input only	This adds an input point to the selected shape. This means that the table item can only have input connectors, which always connect to a point on the left.
		Output only	This adds an output point to the selected shape.
		Both	This adds both input and output points to the selected shape.
	Connector style	This displays the style of the connector lines for the current flow graph. If you select a connector line in the flow graph pane then you can change the style of the selected line.	

Field	Description	
Position	Width	This indicates the width of the selected shape. You can set the width here, either by entering a dimension or by using the slider to adjust the width.
	Height	This indicates the height of the selected shape. You can set the height here, either by entering a dimension or by using the slider to adjust the height.
	LocationX	This indicates the location of the selected shape, on a horizontal axis. You can enter a numerical location here to reposition the shape.
	LocationY	This indicates the location, on a vertical axis, of the selected shape. You can enter a numerical location here to reposition the shape.
Properties	Program name	This indicates the six-character program name that the selected shape will launch.
	Image path	This indicates the path and image name for the selected shape. This option is only applicable to Picture shapes.
	Transition page	This indicates the name of the page within the current flow graph to which the selected shape will transition.
	Flow graph to open	This indicates the name of the flow graph that the selected shape will transition to.

VBScript in Flow Graphs

You can use VBScript to control a node's behavior and appearance.

The `OnLoad` event fires as a flow graph is opened. When you double-click on a node to launch an application, the `OnDb1Clicked` event is fired. The variable `NodeClickedCaption` contains the caption of the item just clicked, and `NodeClickedID` contains the ID of the item just clicked. The ID is a unique identifier for a node in a flow graph, and it is this ID that can be used in the `FlowGraphNodes` variable to modify this or any other node in the flow graph.

If you want to adjust the appearance or behavior of one or more nodes, then double-click the `FlowGraphNodes` item in the variable tree view and the **Modify Flowgraph Nodes** window is displayed. You can click on any node in the current flow graph and its caption and ID will be shown in the dialog box.

Now enter any new properties as required (e.g. a new title, color, style and/or program name). Select the **Add To List** function to add your properties to the list. Now you can click on another node and repeat the process of adding properties.

When you have finished, select the **Insert VBScript Code** function to insert an XML code snippet into your current edit point in your script.

To implement different functionality depending on the node that is double-clicked, interrogate the `FlowGraph.CodeObject.NodeClickedID` variable.



Unlike most other controls using VBScript within SYSPRO, the VBScript that is created for a Flow Graph is saved in the Flow Graph file itself. This means that once you have created your Flow Graph and created a script for it, you can email the Flow Graph file to another person or organization and it should work correctly - there are no extra files that need to be deployed.

To control Flow Graph nodes

1. Launch the **VBScript Editor** from within the **Flow Graph** pane (*Right-click->Macro*).
2. Select the event you want to trap. The **VBScript for FlowGraph** window is displayed enabling you to access the various Flow Graph properties from the **Variables** pane.

Variable	Description
DesktopAlert	<p>This variable is used to display a message on the operator's screen when a certain condition has been met.</p> <p>You can define the alert from this variable, including the duration(which defines how long the alert will stay on the screen) and the animation style (which specifies how the alert will appear or disappear).</p>

Variable	Description
FlowGraphNodes	<p>This variable can be used to determine the ID of a shape and code used to perform tasks dependent on which shape was clicked. This includes changing the shape's title or color theme and calling a SYSPRO program.</p> <p>This code can be placed against the flow graph's <code>OnLoad</code> function to be executed as the flow graph is loaded, or against its <code>OnClicked</code> function to be executed when the operator clicks on the selected shape on this flow graph.</p>
NodeClickedCaption	<p>This variable is used to return the current caption of the shape that was clicked.</p> <p>This could be used within a message back to the operator to confirm that a specific task must be performed, to update a global variable, or to write out to a custom log file.</p>
NodeClickedID	<p>This variable is used to return the ID of the shape that was clicked.</p> <p>You can implement different functionality depending on the shape that is clicked by interrogating the <code>FlowGraph.CodeObject.NodeClickedID</code> variable.</p> <p>This is typically used to determine which shape was clicked, or make sure that a task is only performed when a specific shape was clicked.</p>
OnLoad	<p>This event is fired when the flow graph is loaded.</p> <p>If the script associated with the operator's Home Flow Graph contains an <code>OnLoad</code> function, this event will fire as SYSPRO is loaded, and the code within this function will be executed. This will happen whether the Flow Graph pane is visible to the operator or not.</p> <p>This event also fires when you enter and exit design mode.</p>
OnClicked	<p>This event is fired when the operator clicks on any shape on any page within the flow graph, and there is VBScript code against that flow graph's <code>OnClicked</code> function.</p> <p>This event is configured against the whole flow graph, and can be stopped by setting the function to false within the function.</p>

Inbox

Exploring

Where it fits in?

The **Inbox** SYSPRO Desktop function lets operators receive messages from various sources in the system, notifying them of tasks that need to be actioned.

Functions that write to an operator's message inbox include:

- Trigger Programs
- ECC routings
- Orders processed using the Business-to-Business Trading import facility

Navigation

- This program is accessed from the SYSPRO Ribbon bar:
SYSPRO Ribbon bar > Home

Using

Launching a program using triggers

- If generated from the **Trigger Program Setup** facility, then you can optionally assign a program to be launched when the message is opened.

For example: You could assign a trigger that writes a message to the Stock Controller's Inbox whenever details for a stock code are changed, and launches the **Inventory Query** program automatically once the Stock Controller opens the message.



- ▣ You can make use of this facility within your own applications by calling the program `COMMSQ` with the appropriate parameters defined.
- ▣ Because this program can be invoked as a COM object, you should be able to use any COM-aware application to post messages to SYSPRO.

Launching the SYSPRO Browser

- You can launch the SYSPRO web browser using a link in a message.

Use the business object `COMTIB` to post messages to the user's Inbox. The program to launch is `IMPURL` and the address to be opened is a parameter.

For example:

```
<?xml version="1.0" encoding="Windows-1252"?>
<!-- Copyright 1994-2018 SYSPRO Ltd.-->
<!-- Example to demonstrate the XmlIn passed to the Message Inbox Post Business Object -->
<Message xmlns:xsd="http://www.w3.org/2001/XMLSchema-instance"
xsd:noNamespaceSchemaLocation="COMTIBDOC.XSD">
  <Item>
    <CompanyId>XXX</CompanyId>
    <Operator>XXX</Operator>
    <Date>2013-10-30</Date>
    <Time>05012000</Time>
    <MessageType>USR</MessageType>
    <Subject>OPEN BROWSER</Subject>
    <FromOperator>ADMIN</FromOperator>
    <FromName />
    <ProgramToRun>IMPURL</ProgramToRun>
    <ProgramParameters>http://www.google.com</ProgramParameters>
    <PreventDuplicate>Y</PreventDuplicate>
  </Item>
</Message>
```

The code above will pass a link to Google, which will open in the SYSPRO web browser, to the Inbox of operator **XXX**.

Navigation Pane

Exploring

Where it fits in?

You use the **Navigation Pane** SYSPRO Desktop function to navigate the SYSPRO interface using customized menus. These menus can include links to SYSPRO programs, SYSPRO customized reports, Net Express programs, SRS reports and other applications.

This program includes functions to view a calendar and a list of recently accessed programs.

If you are allowed to design menus, then you can create your own personal menus using this program. If, however, you do not have access to the toolbar, you can still use menus that were created by the system administrator using the **Design Menus** SYSPRO Desktop function.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Starting

Security Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Main Menu - Allow to design menus

Controls whether an operator can create or modify menus on the SYSPRO Desktop (including access to the **Navigation Pane** toolbar functions).

Restrictions and Limits




- Any program that an operator cannot run from the main **Program List** is also restricted in the **Navigation Pane**.

Similarly, any field that an operator is prevented from seeing in a program when run from the normal SYSPRO menu is also restricted here.

- You cannot email the export file if you have not enabled the **Fax/mail integration required** operator option.

Referencing

Toolbar

Field	Description										
	<p>This lets you create a new personal menu in the Navigation Pane.</p> <table border="1"> <tr> <td>Caption</td> <td>Enter the title of your new menu here.</td> </tr> <tr> <td>Menu style</td> <td> <table border="1"> <tr> <td>Task panel</td> <td>This menu style launches applications as well as navigates to other menus or opens flow graphs from within your menu.</td> </tr> <tr> <td>List view</td> <td>This menu style launches applications from within your menu. You can add categories to mimic folders that help you group your programs.</td> </tr> </table> </td> </tr> <tr> <td>Icon id</td> <td>Indicates the id of the icon currently assigned to the menu (0 indicates no icon). Select the Change Icon function to assign an icon to the menu.</td> </tr> </table>	Caption	Enter the title of your new menu here.	Menu style	<table border="1"> <tr> <td>Task panel</td> <td>This menu style launches applications as well as navigates to other menus or opens flow graphs from within your menu.</td> </tr> <tr> <td>List view</td> <td>This menu style launches applications from within your menu. You can add categories to mimic folders that help you group your programs.</td> </tr> </table>	Task panel	This menu style launches applications as well as navigates to other menus or opens flow graphs from within your menu.	List view	This menu style launches applications from within your menu. You can add categories to mimic folders that help you group your programs.	Icon id	Indicates the id of the icon currently assigned to the menu (0 indicates no icon). Select the Change Icon function to assign an icon to the menu.
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List view	This menu style launches applications from within your menu. You can add categories to mimic folders that help you group your programs.										
Icon id	Indicates the id of the icon currently assigned to the menu (0 indicates no icon). Select the Change Icon function to assign an icon to the menu.										
	<p>This loads the Export Menus window so that you can export menus for deployment to other operators in your organization. This is useful when deploying the same or similar menus to a number of operators in the organization.</p>										
	<p>This loads the Import Menus window so that you can retrieve menus that have been exported.</p>										

Recent Programs

This pane retains a list of the last 20 programs you have used, with the most recent program listed first.

You can configure the number of items you want to list in the pane using the **System-wide Personalization** program (*SYSPRO Ribbon bar > Administration*). The last program run appears as the first entry in the list.

You can clear the list by right-clicking in the pane and selecting the **Clear List** option from the context menu displayed.


You can drag-and-drop programs from this pane onto the **Favorites** pane.



Calendar

This displays as many months as will fit in the available space, starting with the current month.


You can personalize the calendar using the **System-wide Personalization** program (*SYSPRO Ribbon bar > Administration*).

Tile functions

Field	Description
Properties	<p>Program Details</p> <p>This lets you view and maintain the details of the program this tile should launch.</p> <p>If no program is linked to the tile (e.g. it is a menu tile, or you created a blank tile) then the Add New Shortcut Wizard program is launched.</p>
	<p>Title</p> <p>Indicate the title that should appear on this tile.</p>
	<p>Tooltip</p> <p>This lets you define a tooltip for the tile that will appear when an operator hovers the mouse pointer over the tile.</p> <p>The tooltip can be text, or an image and can be added programmatically with VBScript (using the <code>Tooltip</code> variable).</p>
	<p>Attach Picture</p> <p>This lets you assign an image to the tile.</p>
	<p>Remove Picture</p> <p>This removes the image currently defined against the tile.</p>
	<p>Action</p> <p>(Navigation Pane only).</p> <p>This lets you set each tile to open another menu (or category) within the Navigation Pane, or to open a flow graph.</p> <div style="border: 1px solid #0070c0; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p> If you define an action for a program tile (i.e. a tile already set to launch a program) then the tile performs both actions when clicked (i.e. the relevant menu, category or flow graph is displayed and the specified program launches).</p> </div>
	<p>Item Height</p> <p>This lets you use a slider to set the height of this tile.</p>

Field	Description						
	<p>Auto Fit</p> <p>This lets you automatically resize the tile to display all appearance settings correctly.</p>						
	<p>Macro</p> <p>This opens the VBScript Editor program.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  You cannot launch the program if you are in Design Mode for a role. </div>						
Appearance	<table border="1"> <tr> <td>Icon</td> <td>This lets you assign an icon to be displayed alongside the tile.</td> </tr> <tr> <td>Style</td> <td>This lets you assign a preset style to the icon.</td> </tr> <tr> <td>Color</td> <td>This lets you define a color for the tile.</td> </tr> </table> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  This option is not enabled if the No XAML theme is selected from the Style option. </div>	Icon	This lets you assign an icon to be displayed alongside the tile.	Style	This lets you assign a preset style to the icon.	Color	This lets you define a color for the tile.
	Icon	This lets you assign an icon to be displayed alongside the tile.					
	Style	This lets you assign a preset style to the icon.					
Color	This lets you define a color for the tile.						
Duplicate Appearance	This lets you apply the tile's appearance settings to all other tiles in the same category.						
Duplicate Height	This lets you set all other tiles in the same category to the height of this tile.						
Delete	This lets you delete the selected tile or category.						
Undo Delete	This restores the deleted tile or category.						
Refresh							

Field	Description	
Export/Import	Export Tile in an Email	This lets you send the tile as an attachment to your email client.
	Save Tile As	This lets you save the file to a specific file location.
	Export Menus	This lets you indicate the menus you want to export.
	Import Tile	This lets you deploy a tile from a saved file.
	Import Menus	This lets you deploy a menu from a saved file.
New	Program Tile	This lets you create a new tile within the current category and launches the Add New Shortcut Wizard program.
	Menu Tile	(Navigation Pane only). You will be prompted to define an action for this tile. It can navigate to another menu in the Navigation Pane (and a category within that menu) or open a flow graph.
	Blank Tile	This lets you create a tile as a placeholder for future definition.
	Category	This lets you create unlimited categories to help organize your tiles.
Layout	Appearance	This lets you apply a preset style to the entire Navigation Pane or Favorites.
	Item Width	This lets you adjust the width of all the tiles in the Navigation Pane or Favorites.
	Item Margins	This lets you set the distance between tiles.
	Auto Fit for all Items	This lets you automatically resize all tiles to display all appearance settings correctly.
	Reset Layout	This lets you reset tiles to their default size.
Large Icons	This sets the icons displayed on each tile to a larger size.	

Field	Description
Expand only Selected Category	This only allows one category to be expanded at a time.
Suspend Refresh Events	<p>This lets you stop the refresh events from firing until it is unselected, or until you exit SYSPRO.</p> <div> The next time that you load SYSPRO, this option will have been unselected, and events will fire again.</div>
Show Program Names in Tooltips	This lets you display the program name in tooltips, even if tooltips are not defined.

Notepad

Exploring

Where it fits in?

The **Notepad** SYSPRO Desktop function lets you enter free format text that functions as a scratchpad while working in SYSPRO.

This text is saved to the `OperatorName.RTF` file (where `OperatorName` refers to the operator who created the note).

Various text editing icons are available from the **Notepad** toolbar and a **Print** icon lets you print the notes.

Navigation

- The **Notepad** SYSPRO Desktop function is located on the right of the main menu as a fly-out pane. You can pin this pane to the desktop or auto hide the pane (the default).

Personalize

Exploring

Where it fits in?

This program lets you customize the appearance of SYSPRO, including overall theme and how forms, list views and panes must appear.

The settings defined here are saved on the client workstation in the `XXXXXX.PRF` file of the `\Base\Settings` folder (where `XXXXXX` indicates your operator code).

Some of these settings can also be defined system-wide using the **System-wide Personalization** program. The system-wide options take precedence over the individual operator settings defined here.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:
SYSPRO Ribbon bar > Home > Personalization

Starting

Security Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Main menu - Customize options

Controls whether an operator can access the **Personalize** function to configure desktop settings.



This option only takes effect the first time the operator logs into SYSPRO after the activity was set to either allowed or denied.

Referencing


Workspace

Field	Description
Workspace backdrop	<p>Display a bitmap image</p> <p>This displays a bitmap image as a background for your workspace.</p> <p>You can make a selection from a pre-defined list of bitmap images at the Select a bitmap field. The image names are stored in the file called <code>DS.ICN</code> (located in the <code>Base</code> folder) which point to the actual bitmap image.</p> <p>You can add your own bitmap images by editing the file: <code>USER.ICN</code> (located in the <code>Base</code> folder). Entries must be added in the format:</p> <pre>image-name:bitmap-name</pre> <p>where:</p> <ul style="list-style-type: none"> ▪ <code>image-name</code> indicates the name of the image that you want to display within this list box. ▪ <code>bitmap-name</code> indicates the actual name of the bitmap stored in the base directory. <p>For long filenames (i.e. where the bitmap name exceeds 8.3 characters) you must enclose the entry in quotes.</p>
	<p>Select a bitmap</p> <p>This displays a pre-defined list of bitmap images from which you can make selections.</p>
	<p>Tile bitmap across workspace</p> <p>This lets you repeats the bitmap image until it covers the entire workspace background.</p>
	<p>Save background for this company only</p> <p>This lets you assign different bitmap images to each company, providing a visual cue as to which company you are logged into.</p>

Field	Description	
Program settings	Save primary window positions upon exit	<p>This restores the primary window to its saved position when next a program is loaded.</p> <p>By default, primary windows for each program are centered within the MDI frame of the main menu.</p>
	Reset	<p>This resets the visual location and size of all primary windows to the original settings applicable at the time the product was shipped.</p> <p>This information is stored in the <code>ADMWIN</code> file within the <code>Settings</code> folder.</p>
Structured G/L ledger code entry	Automatically validate sections as you type	<p>This lets you validate a ledger code section by section as you enter it.</p> <p>If you select this option, then you won't be able to type ahead of the validation process because the system must first complete validating the section you entered before you can enter the next section of the ledger code.</p> <p>If you don't enable this option, you will be able to enter the full ledger code and only validate the code when you use the <code>TAB</code> or <code>ENTER</code> keys to move off the ledger code field.</p>
	Display available sections as drop-down list	<p>This displays a list of valid ledger codes that can be entered wherever a ledger code must be entered in a program.</p> <p>The list of available ledger codes is displayed by default, but can be switched off by selecting <code>CTRL+L</code> at any ledger code field.</p>

Environment Options

Field	Description	
Most recent programs list contains xx entries	This lets you indicate how many entries you want to retain on the Recent Programs list (up to a maximum of 30). Once the list reaches 30 entries, each new program removes the next oldest program from the list.	
Status bar	Show status bar	This displays the status bar in SYSPRO, indicating information such as the current company being accessed, the current system date, the current operator and the current printer.
	Show icon for this company	This associates an icon with the current company on the status bar for visual identification purposes.
	Icon	This indicates the number assigned to the selected icon.
	Change Icon	This displays a selection of icons to choose from. When you select an icon, its corresponding number is inserted into the Icon field.
	Launch help from status bar	This opens the help system when you click on the SYSPRO version in the status bar.
On Startup	Highlight last selected menu item in Program List	This returns you to your last menu item position on the Program List when next you load the system.
	Reload last web page on startup	This automatically refreshes the last web page viewed within the Browser when next you load the system.

Field	Description							
Visual theme	<p>Skins enable you to fully skin the SYSPRO product, including components such as title bars, scroll bars, buttons, checkboxes and option buttons.</p> <table border="1"> <tr> <td rowspan="3">Overall theme for user interface</td> <td>{none}</td> <td>This lets you assign a different theme to each of the controls within SYSPRO.</td> </tr> <tr> <td>Theme</td> <td> <p>Select a specific visual theme for each type of control (e.g. docking pane, list view column, calendar and toolbar) and apply this throughout SYSPRO.</p> <p>Ensure that the font used by the theme you select is supported in the language you are using in SYSPRO. Some languages may not be fully supported in the font used by the selected theme.</p> </td> </tr> <tr> <td>{user defined}</td> <td>This lets you supply your own skin file.</td> </tr> </table> <p>Color theme</p> <p>This lets you choose a default theme color to apply to your user interface.</p> <div style="border: 1px solid #0070c0; padding: 10px; margin-top: 10px;"> <p> Against the Customize and control this application icon (⚙️) from the SYSPRO main menu, a Themes option lets you choose between a <i>Light</i>, <i>Blue</i> or <i>Dark</i> theme. This takes precedence over the Color theme setting made here. However, the <i>Default</i> option lets you revert to the Color theme selection here.</p> </div>	Overall theme for user interface	{none}	This lets you assign a different theme to each of the controls within SYSPRO.	Theme	<p>Select a specific visual theme for each type of control (e.g. docking pane, list view column, calendar and toolbar) and apply this throughout SYSPRO.</p> <p>Ensure that the font used by the theme you select is supported in the language you are using in SYSPRO. Some languages may not be fully supported in the font used by the selected theme.</p>	{user defined}	This lets you supply your own skin file.
Overall theme for user interface	{none}		This lets you assign a different theme to each of the controls within SYSPRO.					
	Theme		<p>Select a specific visual theme for each type of control (e.g. docking pane, list view column, calendar and toolbar) and apply this throughout SYSPRO.</p> <p>Ensure that the font used by the theme you select is supported in the language you are using in SYSPRO. Some languages may not be fully supported in the font used by the selected theme.</p>					
	{user defined}	This lets you supply your own skin file.						

Field	Description
	<p>User-defined skin</p> <p>Indicate your own skin to apply to SYSPRO. User-defined skins must be saved in the <code>\Base\SkinFramework</code> folder on the server. In a client/server environment, the skins saved in this folder are automatically copied to the client machine the next time the operator logs into SYSPRO.</p>
	<p>Ini filename</p> <p>Indicate the initialization (.INI) file to use for the selected user defined skin.</p>
	<p>Show Ribbon bar</p> <p>This replaces the SYSPRO desktop menu bar and toolbar with a Ribbon bar.</p>
	<p>Save theme for this company only</p> <p>This applies the selected skin to the current SYSPRO company only. This lets you indicate different skins for each of your SYSPRO companies.</p>

Tasks

Field	Description
Task definition	Your selection here applies to all tasks defined against your operator code.
	<p>System-wide</p> <p>This sets your task list(s) as applicable to all companies within SYSPRO.</p> <p>Completed tasks are marked as complete in all companies.</p> <p>If system-wide tasks exist and you change this option to By Company then you are prompted to copy your system-wide tasks to all your companies. The tasks are added to the existing tasks already defined against your individual companies.</p> <p>If you elect not to copy tasks, they are retained in the event that you want to restore the task definition to its original setting.</p>

Field	Description
	<p>By Company</p> <p>This sets your task list(s) as applicable to a specific company within SYSPRO.</p> <p>Completed tasks are only marked as complete in the company in which they are defined. You can also copy task groups to a specific company or a number of companies using the Copy Tasks program. You would typically select this option if you have a number of companies and you want to process similar tasks independently for each company (e.g. running a period end on different dates for individual companies).</p> <p>If company-based tasks exist and you change this option to be System-wide then you are prompted to copy your company-based tasks to system-wide tasks. The company based tasks are added to your current list of system tasks.</p> <p>If you elect not to copy tasks, they are retained in the event that you want to restore the task definition to its original setting.</p>
Check for tasks now due on startup	<p>Enable this option if you want to be reminded of any tasks that are due when you load the system.</p> <p>You can also establish whether any tasks are due by selecting the Refresh option within the Task List.</p>

Messages

Field	Description
On startup	<p>Check for messages</p> <p>This automatically checks for messages that have not yet been actioned when you load the system. Messages are posted to the Inbox from various sources within the system.</p> <p>You can also check for new messages by launching the Message Inbox window (right-click within the window and select Refresh Inbox).</p> <p>Delete actioned messages that are more than x days old</p> <p>This deletes all actioned messages automatically upon loading the system, providing they are older than the number of days specified here.</p> <p>You can delete actioned messages manually by selecting the Delete Actioned Messages function.</p>
Automatically refresh message inbox every xx minutes	This refreshes the Message Inbox automatically after a specified number of minutes. You must enable this option if you want the system to display a notification message when new messages arrive.
Display a notification message when new messages arrive	The system notifies you when one or more messages have arrived. This notification takes place when next the message inbox is refreshed. This can be selected only if you are automatically refreshing the message inbox.
Delete Actioned Messages	This deletes all messages that have been actioned, providing they are older than the number of days specified at the option: Delete actioned messages that are more than xx days old .
Reset all Task Dialog Warnings	<p>This resets the file that contains a list of all the task messages that you had previously marked as <i>'Do not show me again'</i>.</p> <p>For example: If you delete the defined printer and then run an application, a message is displayed indicating that no printer is defined. You can select the Do not show me again option from the message and the warning message is not re-displayed the next time you run an application. You can, however, select the Reset all Task Dialog Warnings option to re-display the message if required.</p>

Reporting

Field	Description
Optimize document printing by pre-loading the Crystal runtime as SYSPRO loads	<p>This improves the performance of documents that are produced using SRS document printing by pre-loading the Crystal runtime when SYSPRO loads.</p> <p>This option must be enabled to apply the SRS Runtime check <code>SRSRuntimeFix.exe</code> to SRS document printing. The <code>CrConfig</code> file must contain the correct <code>Java Dir</code> path for the check to apply.</p> <p>You can only access this field when the Optimize by pre-loading Crystal runtime system-wide personalization option is defined as Set at operator level (System-wide Personalization).</p> <p>For example: if the system-wide option is set to Optimize for all operators then this field is disabled and ignored, regardless of its previous setting.</p>
Automatically check for new SRS reports every nn minutes	<p>This sets the time interval in minutes at which an alert message is displayed on the desktop when new (unread) reports are available to view in the SRS Document Queue.</p> <p>This applies to server-side reporting.</p>
Reset All Default Settings	<p>This configures all reports to be output to the current printer destination.</p>

Calendar

You use the **Company Calendar** program to define the specific working and non-working days on your company calendar.

Field	Description	
Calendar options	Show week numbers in date navigator	This displays the week number when using the Date Navigator .
	Number of days in first week of year	<p>If you selected the option to show week numbers in the date navigator, then this indicates the number of days from the previous year that occur in the first week of the current year.</p> <p>This enables you to control the week numbering against the Date Navigator.</p> <p>If the first week of the current year contains four or more days from the previous year, then the first week of the year is numbered as week 53. If it contains three or less days from the previous year, then it is numbered as week 1.</p>
	Show non-working days in date navigator	This highlights non-working days within the Date Navigator .

Field	Description								
Select Color	<p>Select the color you want to use to highlight non-working days in Date Navigator.</p> <table border="1"> <tr> <td>Apply to background</td> <td>This applies the selected color to the background area of any non-working day.</td> </tr> <tr> <td>Apply to foreground</td> <td>This applies the selected color to the foreground (i.e. the text itself) of any non-working day.</td> </tr> <tr> <td>First day of week</td> <td>This indicates which day of the week must be displayed as the first day within the Date Navigator.</td> </tr> <tr> <td>Calendar theme</td> <td> <p>This selects the theme you want to apply to the calendar within SYSPRO.</p> <p>You can't access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p> </td> </tr> </table>	Apply to background	This applies the selected color to the background area of any non-working day.	Apply to foreground	This applies the selected color to the foreground (i.e. the text itself) of any non-working day.	First day of week	This indicates which day of the week must be displayed as the first day within the Date Navigator .	Calendar theme	<p>This selects the theme you want to apply to the calendar within SYSPRO.</p> <p>You can't access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p>
Apply to background	This applies the selected color to the background area of any non-working day.								
Apply to foreground	This applies the selected color to the foreground (i.e. the text itself) of any non-working day.								
First day of week	This indicates which day of the week must be displayed as the first day within the Date Navigator .								
Calendar theme	<p>This selects the theme you want to apply to the calendar within SYSPRO.</p> <p>You can't access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p>								

Field	Description	
Calendar data provider	Use Outlook	<p>This synchronizes Outlook's appointments, schedules, events, etc., in your SYSPRO calendar.</p> <p>Details captured in SYSPRO's calendar are also automatically synchronized to Outlook.</p> <p>Some details (e.g. body text, attendees, attachments, regarding, result, etc.) are not synchronized to Outlook.</p>
	Use local file	<p>This captures events, schedules, appointments, etc., without synchronizing to Outlook.</p> <p>The captured details are stored in the <code>xxxxxxx_calendarevents.xml</code> file of the <code>Base\Settings</code> folder (where <code>xxxxxxx</code> refers to the operator name).</p> <p>If you select this option and later select to use Outlook, then the current details in the <code>xxxxxxx_calendarevents.xml</code> file are not synchronized to Outlook (i.e. details are only synchronized to Outlook from the time you select to option to use Outlook).</p>
	None	<p>This indicates you do not want to use the calendar control.</p> <p>This does not affect the running of SYSPRO, as the calendar control is not currently linked to any SYSPRO functionality.</p>

List views

List views in SYSPRO are used throughout the system to represent data in a grid (i.e. rows and columns). Within SYSPRO you can customize the global look-and-feel of these list view windows.

Field	Description
Default font for list views and forms	<p>This indicates the font currently in use for list views and forms.</p> <p>Change Font This lets you change the default font and font attributes (e.g. bold, italic) of list views and forms in SYSPRO.</p> <p>This does not apply to the SYSPRO main menu listview pane.</p>
	<p>Apply font to all This applies the default font for list views rows, regardless of whether an operator has assigned a different font to list view rows.</p> <p>The only exception to this are list views where the font and style has been customized using CTRL+Q (i.e. customizing individual rows).</p>
Default font for listview captions	<p>This indicates the font currently in use for list view captions.</p> <p>Change Font This lets you change the default font and font attributes (e.g. bold, italic) of list view captions in SYSPRO.</p>
	<p>Apply font to all captions This applies the default font for list view captions, regardless of whether an operator has assigned a different font to list view captions.</p> <p>The only exception to this are list views where the font and style has been customized using CTRL+Q (i.e. customizing individual rows).</p>
Font for Quick View	<p>This indicates the font currently in use for the Quick View displays.</p> <p>Change Font This lets you changes the default font and font attributes (e.g. bold, italic) of the Quick View displays in SYSPRO.</p>

Field	Description				
List view options	<p>These options apply only to list views and not to Display Forms, Entry Forms or any other type of object.</p>				
	<table border="1"> <tr> <td>Default date format</td> <td>This indicates the format in which you want to display dates in list views. The date format you selected is displayed next to this field.</td> </tr> <tr> <td>Apply date format to all list views</td> <td> <p>This applies the default date format in all list views, regardless of whether an operator has assigned a different date format to list views.</p> <p>The only exception to this is list views where the font and style has been customized using CTRL+Q (i.e. customizing individual rows).</p> <p>This option does not apply to Entry Form style 'list views'.</p> <p>The date formats for Entry Forms are always one of the following:</p> <ul style="list-style-type: none"> ■ DD/MM/YYYY ■ MM/DD/YYYY ■ YYYY/MM/DD </td> </tr> </table>	Default date format	This indicates the format in which you want to display dates in list views. The date format you selected is displayed next to this field.	Apply date format to all list views	<p>This applies the default date format in all list views, regardless of whether an operator has assigned a different date format to list views.</p> <p>The only exception to this is list views where the font and style has been customized using CTRL+Q (i.e. customizing individual rows).</p> <p>This option does not apply to Entry Form style 'list views'.</p> <p>The date formats for Entry Forms are always one of the following:</p> <ul style="list-style-type: none"> ■ DD/MM/YYYY ■ MM/DD/YYYY ■ YYYY/MM/DD
	Default date format	This indicates the format in which you want to display dates in list views. The date format you selected is displayed next to this field.			
	Apply date format to all list views	<p>This applies the default date format in all list views, regardless of whether an operator has assigned a different date format to list views.</p> <p>The only exception to this is list views where the font and style has been customized using CTRL+Q (i.e. customizing individual rows).</p> <p>This option does not apply to Entry Form style 'list views'.</p> <p>The date formats for Entry Forms are always one of the following:</p> <ul style="list-style-type: none"> ■ DD/MM/YYYY ■ MM/DD/YYYY ■ YYYY/MM/DD 			
	Show disabled list view cells in gray	<p>Displays the descriptive text for listview cells which cannot be edited in gray.</p> <p>This applies to entry type list views.</p>			
	Show lock icon for disabled list view cells	<p>Displays a lock icon next to list view cells which cannot be edited.</p> <p>This applies to entry type list views.</p>			
	Show multi-line column headings	Displays listview headings across multiple lines. This increases the height of a listview heading to accommodate the full description for each column heading of the listview.			
Shade sorted columns	Apply background shading to highlight the column by which the listview is sorted.				
Comment line style	Indicate the style you want to display comment lines in list views.				

Field	Description												
	<table border="1"> <tr> <td>Color</td> <td>Indicate the color in which you want to display comment lines in list views.</td> </tr> <tr> <td>Column line style</td> <td>Indicate the style you want to use to display columns in your list views.</td> </tr> <tr> <td>Column style</td> <td> <table border="1"> <tr> <td>Explorer</td> <td>Display the Windows Explorer style as the column style for your list views.</td> </tr> <tr> <td>Office 2003</td> <td>Display the Microsoft Office 2003 style as the column style for your list views.</td> </tr> <tr> <td>Office 2007</td> <td>Display the Microsoft Office 2007 style as the column style for your list views.</td> </tr> </table> </td> </tr> </table>	Color	Indicate the color in which you want to display comment lines in list views.	Column line style	Indicate the style you want to use to display columns in your list views.	Column style	<table border="1"> <tr> <td>Explorer</td> <td>Display the Windows Explorer style as the column style for your list views.</td> </tr> <tr> <td>Office 2003</td> <td>Display the Microsoft Office 2003 style as the column style for your list views.</td> </tr> <tr> <td>Office 2007</td> <td>Display the Microsoft Office 2007 style as the column style for your list views.</td> </tr> </table>	Explorer	Display the Windows Explorer style as the column style for your list views.	Office 2003	Display the Microsoft Office 2003 style as the column style for your list views.	Office 2007	Display the Microsoft Office 2007 style as the column style for your list views.
Color	Indicate the color in which you want to display comment lines in list views.												
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Explorer	Display the Windows Explorer style as the column style for your list views.												
Office 2003	Display the Microsoft Office 2003 style as the column style for your list views.												
Office 2007	Display the Microsoft Office 2007 style as the column style for your list views.												
Reset List view Settings	<p>This removes the layout settings applied to all your list views and resets them to the default list view layout for your operator code.</p> <p>Selecting this function has no effect on list views that are customized for a specific role to which your operator code is assigned.</p>												
Preview	Test your selections before applying them to property windows throughout the system.												

Forms

Field	Description
Entry and display form options	<p>Read-only color</p> <p>This indicates the color of the value text for fields containing a value (excluding hyperlinks).</p> <p>For entry forms it indicates the color of the text for both the caption and displayed values for fields that are currently set to read only.</p>
	<p>Background color</p> <p>This lets you colorize the background of forms (e.g. within query programs). You can choose to apply one of the standard system colors (i.e. associated with the display properties of your workstation) or you can choose your own color.</p> <p>If you selected a background color of Other, then you use the dropdown icon to select the specific color you want to use for the form background.</p>
	<p>Apply this background color to all forms</p> <p>This forces all forms to use the selected background color.</p> <p>Operators will be unable to selectively change the color of any form using the CTRL+F4 list view function.</p>
	<p>Group background color</p> <p>This lets you assign a color to the background of items that are grouped together within a form (e.g. ship address details).</p> <p>You can apply one of the standard system colors (i.e. associated with the display properties of your workstation) or your own color.</p> <p>When you select a group background color of Other, you use the dropdown icon to select the specific color you want to use.</p>
	<p>Colorize group headings</p>
	<p>Show icons for custom fields</p> <p>This places an icon at the beginning of the caption of each field that has been added to a form, regardless of whether they are custom form fields, related fields, or scripted fields. This affects all display and entry forms.</p>

Field	Description
	<p>Highlight focused form field</p> <p>This places a rectangle around the value part of the field on which focus is currently set.</p>
	<p>Show description of keys in form caption</p> <p>This displays the description for key fields (e.g. Branch, GL code, Currency, etc) on a form. The matching description for the code appears in brackets within the caption portion of the field. This applies to the current company only.</p>
	<p>Show grid lines</p> <p>This lets you indicate how you want to display grid lines on forms. You can set them to be always displayed, never displayed or to be displayed individually by form.</p>
	<p>Show captions in bold</p> <p>This lets you indicate how to display captions on forms. You can set them to be always displayed in bold, never displayed in bold or to set the display individually by form.</p>
Preview	<p>Select this to test your selections before applying them to property windows throughout the system.</p>

Docking Panes

Field	Description
Docking pane and Tab options	<p>Show maximize button in caption for adjacent panes</p> <p>This displays the maximize and restore buttons when two panes appear next to each other within a SYSPRO window.</p>
	<p>Highlight caption for active pane</p> <p>The system indicates which pane within a window is currently active.</p>
	<p>Show floating panes as windows</p>
	<p>Position of tabs for tabbed panes</p> <p>This indicates where you want to position tabs buttons for panes that include tab pages. You can position them left, right, top or bottom.</p>
	<p>Resize panes dynamically as splitter is dragged</p> <p>The system dynamically resizes panes as you drag the splitter (i.e. there is no delay in redrawing the window).</p>
	<p>Splitter style</p> <p>This lets you configure the style of the splitter between panes.</p>
	<p>Splitter size</p> <p>This lets you configure the size of the splitter.</p>
	<p>Tab appearance</p> <p>This applies a theme to tabs that appear within a pane.</p> <p>You won't be able to access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p>
	<p>Docking theme</p> <p>This applies a theme to docking panes.</p> <p>You won't be able to access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p>




Field	Description
	Opacity for inactive floating panes This indicates the level of opacity for inactive floating panes. When a pane is floated but not selected, it will become opaque to the degree selected at this option.
Reset Layout	This resets all docking pane layouts to the position they were in at the time the software was shipped (for the current operator).
Preview	This lets you test your selections before applying them throughout the system.



Toolbars

Field	Description
Toolbar options	<p>Toolbar theme</p> <p>This lets you assign a theme to toolbars within SYSPRO.</p> <p>You can't access this field if you selected to apply an overall theme for the user interface (Environment Options tab). The overall theme that was selected is displayed here.</p>
Reset Toolbar Settings	This reverts all toolbar settings to their default settings (this removes all Tbar_*.XML files from your \Base\Settings folder).
Preview	This lets you test your selections before applying them throughout the system.

Credentials

Field	Description
Email options	<p><i>Use system default</i></p> <p>Select this option to use the default email system.</p> <p><i>Microsoft Office 365</i></p> <p>Select this option to use a Microsoft Office 365 account.</p>
User name	<p>Enter your Microsoft Office 365 user name credentials.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px; margin-top: 10px;">  This field only applies if you select the Microsoft Office 365 email option. </div>
Password	<p>Input your Microsoft Office 365 password credentials.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px; margin-top: 10px;">  This field only applies if you select the Microsoft Office 365 email option. </div>
Tenant to use	<p>Select the tenant that SYSPRO must use when communicating with Microsoft Office 365.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px; margin-top: 10px;">  This defaults to the System-wide tenant option which provides default values if you haven't previously configured a specific tenant to use. </div>
Tenant Id	This indicates the Microsoft Office 365 tenant ID for the company.
Client Id	This indicates the Microsoft Office 365 client ID for the company (also known as the application ID).
Exchange web service	This indicates the <code>URI</code> address to your exchange web service provider.

Program List

Exploring

Where it fits in?

The **Program List** SYSPRO Desktop function loads a tree view representation of the programs within SYSPRO.

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home > Program List

Starting

Security Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Main Menu - Allow to publish menu as HTML

Controls whether an operator is able to publish the main menu as an HTML file.

This is to prevent unauthorized access to system files when browsing for a location to save the web menu.

Solving

Why is the **Program List** pane blank?

The **Program List** pane is blank if the **Enable standard SYSPRO menus** option is not enabled for the operator.

Referencing

Program List

Field	Description										
Program description	This column indicates the descriptive name of programs on the menu.										
Program	This column indicates the six-character program name.										
Category	This indicates the category of the program (e.g. Setup, GL Integration, etc.)										
Context menu (right-click or Ctrl+F1)	Right-click in the pane (or press CTRL+F1) to load a context-sensitive menu with additional options.										
Publish menu as HTML	<p>This creates a customized web menu for use in the SYSPRO browser. A wizard will guide you through the process of creating the menu.</p> <h3>Web Menu Wizard</h3> <table border="1"> <tbody> <tr> <td>Table of Contents title</td> <td>Enter the title of your HTML menu here.</td> </tr> <tr> <td>Favorites title</td> <td>This title will appear in your SYSPRO Browser Favorites menu.</td> </tr> <tr> <td>Web location</td> <td>This indicates the folder to which your menu will be saved.</td> </tr> <tr> <td>Folders to include in your menu</td> <td>Select the folders, and therefore the applications, that you want to include in your menu. All folders are selected by default.</td> </tr> <tr> <td>Choose a theme</td> <td>Select a visual theme for your menu from this list.</td> </tr> </tbody> </table>	Table of Contents title	Enter the title of your HTML menu here.	Favorites title	This title will appear in your SYSPRO Browser Favorites menu.	Web location	This indicates the folder to which your menu will be saved.	Folders to include in your menu	Select the folders, and therefore the applications, that you want to include in your menu. All folders are selected by default.	Choose a theme	Select a visual theme for your menu from this list.
Table of Contents title	Enter the title of your HTML menu here.										
Favorites title	This title will appear in your SYSPRO Browser Favorites menu.										
Web location	This indicates the folder to which your menu will be saved.										
Folders to include in your menu	Select the folders, and therefore the applications, that you want to include in your menu. All folders are selected by default.										
Choose a theme	Select a visual theme for your menu from this list.										
Include/Exclude Category 'Browses'	This lets you toggle the display of Browse folders on the menu. These folders are excluded by default.										
Include/Exclude Category 'Reports'	This lets you toggle the display of Report folders on the menu. These folders are excluded by default.										

Quick Access Toolbar

Exploring

Where it fits in?

The **Quick Access Toolbar** SYSPRO Button lets you access additional shortcuts to a number of functions in SYSPRO.

Starting

Security

Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Main menu - 'Run any program' function

Controls whether an operator can launch a SYSPRO program by selecting the **Run a program** option from the **SYSPRO Button**, or by pressing **CTRL+R** from within the SYSPRO Main Menu.



This option only takes effect the first time the operator logs into SYSPRO after the activity was set to either allowed or denied.

Main menu - Run new SYSPRO instance

Controls whether an operator can select the **New SYSPRO instance** option from the **SYSPRO Button** of the SYSPRO Main Menu.



A change to this activity is only recognized when the operator logs out of SYSPRO and then back into SYSPRO.

Fields

You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

Company date and temporary date

Controls whether an operator can change the company and/or temporary dates via the:

- **Company Date** function (*Quick Access Toolbar SYSPRO Run button > Company Date*)
- **CTRL+D** keyboard shortcut

Company Date

The company date is set company-wide (i.e. applicable to all SYSPRO operators) and indicates the exact day, month and year that is applied to transactions. This date is updated for each single month of the year, typically by your head accountant or financial operations manager.

Temporary Date

The temporary date is *exclusively* operator specific (i.e. applicable to the operator currently logged in) as it is applied to transactions initiated and posted by the operator currently logged in, for the duration of their current SYSPRO instance or session.

Once the operator logs out or exits SYSPRO, the company date is then used as the default until a temporary date is redefined (when necessary).

This security mechanism also ties into the following Date options as defined within the **Operator Maintenance** program:

- Allowed to change temporary company date:

This lets operators use a specific default date for transactions which remains valid until they exit from SYSPRO, or select a different date.

This is accessed via the **Set temporary date** and define the **New date** field.

- Allowed to change company date:

This lets the operator change the company date in SYSPRO (if the operator is allowed to change the temporary company date).










This security mechanism must be enabled for the operators that fall within a particular role (e.g. accountant) and disabled for all other SYSPRO operators that don't have the authorization to change these dates.

If permissions are carelessly managed, it can cause major financial implications for your business and lead to security breaches. Therefore, its imperative that only designated employee(s) have access to changing these dates.

Referencing

Quick Access Button

Field	Icon	Description
New		This loads the relevant setup program for a number of items in SYSPRO for which you want to capture details (e.g. customer, supplier, contact, sales order, purchase order, job, quotation, menu and appointment).
Switch Company		This lets you access a different company.
Company Date		<p>This sets the default date for transactions.</p> <p>Setting the Company date does not affect operators currently logged in, but will be the default date used for new operators loading SYSPRO.</p> <p>Alternatively, you can choose to set a Temporary date that will not affect other operators and remain in force until you change it or exit SYSPRO.</p>
New SYSPRO Instance		<p>This launches a separate instance of SYSPRO using the same operator and concurrent license (i.e. it does not consume an additional concurrent user license).</p> <p>SYSPRO requires that the first login is the <i>controlling process</i> and other instances are run from this first or <i>primary</i> instance. New instances can therefore only be launched while the primary instance is running.</p> <p>Once the new instance is loaded you can run any authorized SYSPRO program as normal. However, only the original SYSPRO instance can access the New SYSPRO Instance and Switch Company options.</p> <p>An instance number is appended to the window title of each subsequent instance loaded (useful to identify the different instances when tabbing between windows).</p>

Field	Icon	Description
Run a Program		<p>This loads a SYSPRO program manually. You would typically use this if you know the name of the program and don't want to waste time navigating a menu structure to locate the program.</p> <p>You can also append parameters to the program (e.g. an entry of <code>APSPEN 0000001</code> will load the Supplier Query program and automatically select supplier <code>0000001</code>).</p>
Run Last Program		This loads the last program that was run in SYSPRO.
Exit SYSPRO		This exits SYSPRO.

Reminder

Exploring

Where it fits in?

The **Reminder** SYSPRO Desktop function displays the reminders for the tasks you defined using the **Tasks** Desktop function (providing you selected the **Set reminder if due** Task option and the task is not set to complete).

Navigation

- This program is accessed from the SYSPRO Ribbon bar:

SYSPRO Ribbon bar > Home

Referencing

Task Reminders

You typically use your right mouse button to highlight a reminder and then select from a number the options:

Field	Description
Open	This activates the task (e.g. if the task is set to run a query and you select this option, then query is loaded).
Set Reminder Off	This deactivates the currently highlighted reminder.
Clear All Reminders	This deactivates all reminders currently displayed.
Refresh	This displays the latest reminder information.

Ribbon bar

Exploring

Where it fits in?

The **Ribbon bar** on the SYSPRO Desktop consolidates key functions and features onto an easy-to-access window.

Solving

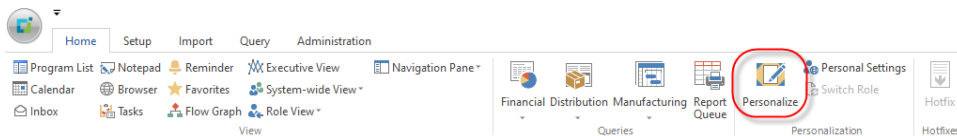
FAQs

How do I hide or show the Ribbon bar?

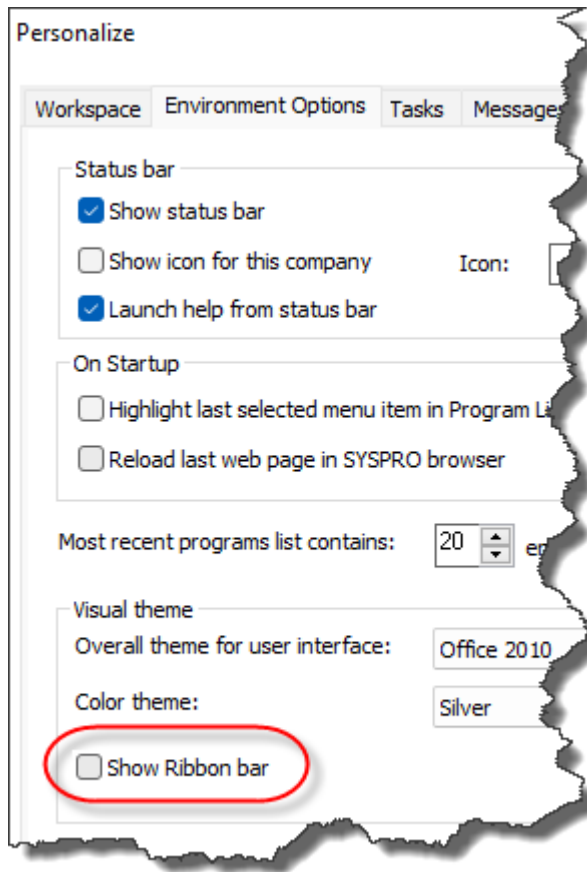
You control how to display SYSPRO's Ribbon bar using the **Personalize** program (run from the main menu).

To hide the Ribbon bar

1. Select the **Personalize** function from the Ribbon bar:



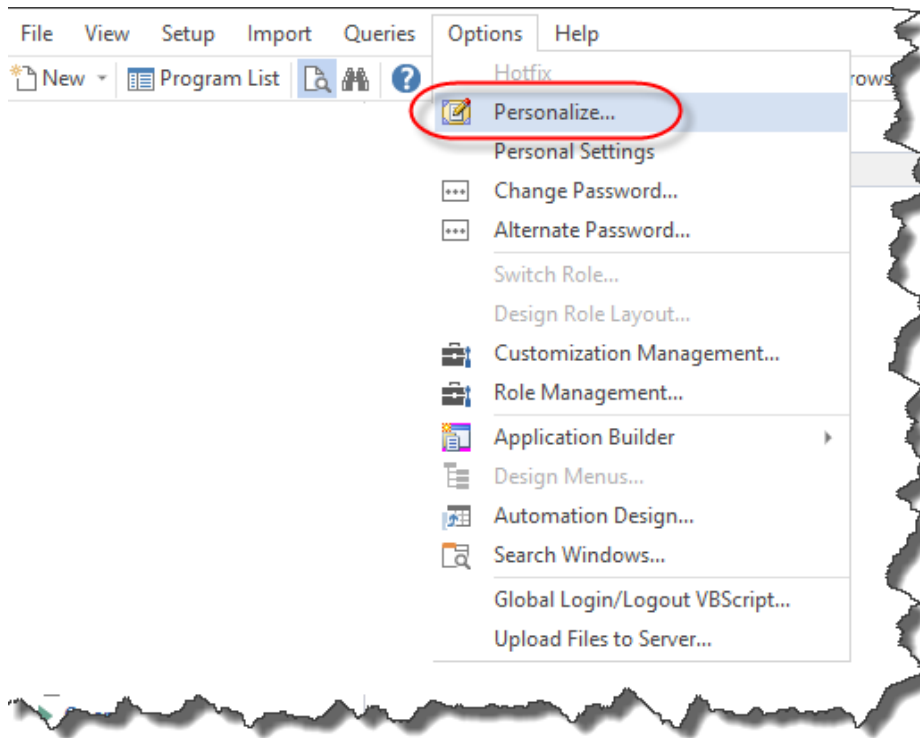
2. Select the **Environment Options** tab and deselect the **Show Ribbon bar** option:



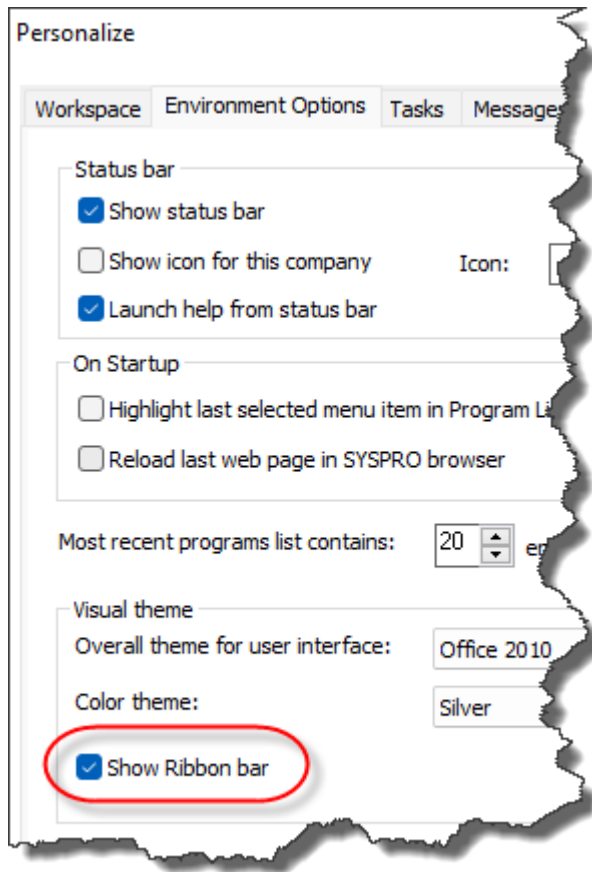
3. Select **Apply** to keep this setting until you next change your selection. Alternatively, select **OK** to apply the change only for this run of SYSPRO.

To show the Ribbon bar

1. Select the **Personalize** function from the **Options** menu bar:



2. Select the **Environment Options** tab and enable the **Show Ribbon bar** option:








3. Select **Apply** to keep this setting until you next change your selection. Alternatively, select **OK** to apply the change only for this run of SYSPRO.




Referencing



Home






View

Field	Icon	Description
Program List		This lets you navigate and run SYSPRO programs from a tree view menu.
Calendar		<p>This manages your appointments, events and schedules from within SYSPRO.</p> <p>You can configure and customize calendar settings - at operator level (<i>SYSPRO Ribbon bar > Home > Personalization</i>) or system-wide (<i>SYSPRO Ribbon bar > Administration</i>).</p> <p>You can indicate that the data provider is a local file (stored in <code>settings\operator_calendarevents.XML</code>) or integrated to Outlook.</p> <p>If you are using the Contact Management System, then you can synchronize appointment and meeting type activities (Post Activity) to the calendar.</p>





Field	Icon	Description
Inbox		<p>This lets you receive notification messages when tasks need to be actioned.</p> <p>Functions in SYSPRO that write to an operator's Inbox include:</p> <ul style="list-style-type: none"> ■ Trigger Programs <p>You can optionally assign a program to be launched when the message is opened (e.g. assign a trigger that writes a message to the Stock Controller's Inbox whenever details for a stock code are changed, and launches the Query program automatically once the Stock Controller opens the message).</p> ■ ECC routings ■ Orders processed using the B2B Trading import facility. <p>You can use this facility within your own applications by calling the program <code>COMMSQ</code> with the appropriate parameters defined (see linkage file <code>COMMSQ.LNK</code>).</p> <p>Because this program can be invoked as a COM object, you should be able to use any COM-aware application to post messages to SYSPRO.</p>
Notepad		<p>This lets you enter free format text that will be saved in the <code>operator.RTF</code> file (where <code>operator</code> indicates the operator's name).</p>
Browser		<p>This lets you view HTML pages from within SYSPRO without having to load an external browser program. You can enter a URL in the address bar (providing you have access to the SYSPRO Browser - Manual URL address entry operator activity).</p>

Field	Icon	Description
Tasks		<p>This lets you create a checklist of tasks you want to schedule for a particular period which you can optionally complete in a set sequence.</p> <p>You can automate the launching of programs (tasks) within a task group. If the program is not listed in the Automation Design listview (and you did not define the Automation form values) then the operator will be prompted to make the necessary screen selections.</p> <p>Tasks can be defined as system-wide or company-specific.</p>
Reminder		<p>This lets you view reminders for tasks that are due.</p>
Favorites		<p>This lets you construct your own listing of frequently-used programs for quick access to applications within SYSPRO.</p> <p>You can launch the Add New Shortcut Wizard to lead you through the process of adding SYSPRO programs to the Favorites pane, or you can drag-and-drop programs from the Program List pane.</p> <p>You can construct an unlimited number of categories to which you can assign links to programs. These program links are represented as dynamic tiles against which you can apply a variety of visual themes and styles.</p> <p>You can drag items such as applications, documents or pictures from Windows Explorer directly into the category of your choice.</p> <p>You can also drag-and-drop tiles from one category to another and reposition categories. Each tile can launch an application and the contents of the tile can be dynamically changed using VBScript.</p>




Field	Icon	Description
Flow Graph		<p>This lets you construct a flow graph that describes, for example, a business process in your organization. Sample templates are provided that you can use as a starting point to construct new flow graphs.</p> <p>Flow graphs consist of shapes and tables (containing table items) that can be connected. Shapes can be defined so that when you click on them they can run any type of application, transition to a new page or open a different flow graph.</p> <p>You can describe the properties of a Flow Graph in the Properties pane. In addition, you can restrict which operators are allowed to edit the flow graph.</p>
Executive View		<p>This lets you add your own customized panes containing a number of graphical components. These include:</p> <ul style="list-style-type: none"> ▪ Graph ▪ Listview ▪ Web browser ▪ SRS/Crystal report ▪ PDF Viewer ▪ Rich text notepad ▪ NET User Control Form ▪ Search Window ▪ Executive Dashboard <p>To import customized panes you will need to have access to the Allow to import customized panes activity.</p>

Field	Icon	Description
System-wide View		<p>This lets you add or import customized panes and display them on the main menu for everyone.</p> <ul style="list-style-type: none"> ■ Show System-wide View Display the System-wide View pane in the main menu. ■ Design System-wide View Begin designing the customized pane. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  The Design UI Layouts function must be open before you can do this. </div>
Role View		<p>This lets you add or import customized panes and display them on the main menu for the specified role.</p> <ul style="list-style-type: none"> ■ Show Role View Display the Role View pane in the main menu. ■ Design Role View Begin designing the customized pane. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  The Design UI Layouts function must be open before you can do this. </div>
Navigation Pane		<p>This lets you create menus added as task panels or tree views that can either manage applications and documents or act as menu navigation aids.</p> <p>If you use a task panel to construct a menu, then menu items (i.e. tiles) can be used to launch an application, navigate to a group of menu items, or open a Flow Graph.</p> <p>You control the behavior of a tile (i.e. navigate to a menu or open a Flow Graph) using action settings.</p> <p>Right-click on a tile in a menu and select Actions from the Properties shortcut menu. You can export and import menus.</p>

Queries



	Icon	Description
Financial		This lets you access key query programs within the Financial suite of programs.
Distribution		This lets you access key query programs within the Distribution suite of programs.
Manufacturing		This lets you access key query programs within the Manufacturing suite of programs.
Report Queue		This lets you view completed reports or reports that are in the reporting queue (if you are using SRS server-side printing).

Personalization

Field	Icon	Description
Personalize		This lets you customize the various elements of the SYSPRO desktop to assist you in locating information and navigating the product.
Personal Settings		This lets you customize certain personal settings at operator level.
Switch Role		<p>This lets you choose a different role that has been pre-assigned to the operator.</p> <p>Roles control the look of docking panes, display and entry forms and list views. When initially assigning roles to an operator, you need to login afresh to be able to select his option.</p>



Hotfixes

Field	Icon	Description
Hotfix		<p>This button shows the Mandatory Hotfixes or Optional/Customer-specific Hotfixes recorded against your customer code, which have not yet been installed.</p> <div data-bbox="667 510 1430 763" style="border: 1px solid #0070C0; padding: 10px;"><p> This button only provides <i>visibility</i>. You cannot install a hotfix from inside SYSPRO.</p><p>To install hotfixes, you must run the SYSPRO Installer application.</p></div>





Customize and control this application

Option	Description
Panes	<p>This lets you choose from a list of panes in the current docking layout.</p> <p>The panes displayed in gray are available for selection.</p>
Cards	This lets you select a Key Card or Insight Card to be displayed as a floating pane.
Themes	This lets you choose between a <i>Light</i> , <i>Blue</i> or <i>Dark</i> theme, which takes precedence over the Color theme setting made against the Environment options of the Personalize program. The <i>Default</i> option reverts to the Color theme settings.
Design Web View / Edit Web View	This opens the Visual Designer to customize web views.
Customization Profiler	<p>This opens the Customization Profiler program to view and analyze customizations that have been applied to the application or main menu.</p> <p>The program can be loaded from any docking pane caption or menu pull-down (right-click the title bar of a pane and select Customization Profiler from the context menu). A list view displays all the customization changes.</p>
Reset Layout	This restores forms to their default position, including those that were previously closed. Customized or associated panes remain in their current location and the content and sequencing of forms or list views is not affected.
Hide/Show Web View	This hides or shows the web view for the program, if one exists (F11 toggles these captions).
Hide/Show Pane Titles	This hides or shows the docking pane captions (F12 toggles these captions).
Hide/Show Pin Buttons	<p>This hides or shows the pin button on all docking panes.</p> <p>This is only available from the SYSPRO Main Menu (i.e. not in individual programs) when the Minimalist user interface options is enabled, and operator is logged in using a role that is not allowed to save docking layouts.</p>








Option	Description
Show List View Toolbar	<p>This lets you indicate how you want to display the built-in toolbar for list views (i.e. Always, Never, or By List View).</p> <p>Changing the Show built-in toolbar option in the System-wide Personalization program does not affect the operator's preference and setting to Always show the list view toolbar.</p>
Auto Close Floating Panes in Web Views	<p>This option is only available from the SYSPRO Main Menu.</p> <p>This closes floating panes automatically when you click anywhere in a web view, or when you exit from an application.</p>

Setup

Setup Options

Field	Icon	Description
Setup Options		This lets you access setup options for your SYSPRO suite of modules
General Setup		This lets you access setup programs that are used company-wide (e.g. currencies and tax options).
Stationery Formats		This lets you access setup programs for pre-printed stationery programs and SRS documents.
Company Tables		This lets you access setup programs relating to company-wide tables such as invoice terms, commission and invoice discounts.




Security

Field	Icon	Description
Passwords		This lets you define passwords against various functions that can be performed within SYSPRO programs as well as to change an operator password.
Operators		This lets you maintain a list of operators requiring access to SYSPRO, and to define any restrictions applicable to individual operators.
Groups		This lets you add and maintain the groups to which operators are assigned.
Roles		This lets you configure security settings at operator role level.
Electronic Signatures		This lets you configure security at transaction level by authenticating the operator performing the transaction.
Job Logging		This lets you maintain a log file of all programs that have been accessed by operators.
Amendment Journals		This lets you view an audit trail of any changes made to SYSPRO Setup programs.







Printing

Field	Icon	Description
Request Print Dialog		<p>This lets you select the printer to use before printing your SYSPRO documents. In a non-Windows Printing environment you can also select the attribute to use.</p> <p>This option is ignored when running a SYSPRO program in automated mode.</p>
Windows Printing		<p>This lets you use the Windows Print Manager (i.e. the standard way of printing from within a Windows environment) for printing documents and reports from within SYSPRO.</p>
Report Preview		<p>This lets you display SYSPRO reports in a preview window before printing them.</p> <p>Enabling/disabling this option automatically enables/disables the Preview report option against all SRS reports.</p> <p>When this option is disabled, you need to manually select at least one output method on the Output Options tab of an SRS report to enable the Process function for the report.</p>
Document Preview		<p>This lets you display SYSPRO documents in a preview window before printing them.</p> <p>When enabled, SRS documents are previewed when printed in online or batch mode unless the calling program suppresses previewing.</p> <div style="border: 1px solid green; padding: 10px;"><p>This doesn't apply if you selected to email or fax one (or more) of the documents within the batch from one of the following programs:</p><ul style="list-style-type: none">▪ AP Check and Remittance Print▪ Factory Documentation▪ Document Print▪ Purchase Order Print▪ RMA Document Print▪ Quotation Batch Printing</div>

Field	Icon	Description
Print Setup		This lets you configure printers for use within SYSPRO.
Page Setup		This lets you configure page settings for printing from within SYSPRO.
Fax Settings		This lets you define the settings for faxing documents from within SYSPRO.








Import Import

Field	Icon	Description
Financial		This lets you access import programs within SYSPRO's Financial suite of modules.
Distribution		This lets you access import programs within SYSPRO's Distribution suite of modules.
Manufacturing		This lets you access import programs within SYSPRO's Manufacturing suite of modules.
Quantum Architecture		This lets you access setup options import and master data import programs using the Quantum Architecture module.

Query Reporting

Field	Icon	Description
Reporting Services		This lets you define and run reports using SYSPRO Reporting Services.
Report Writer		This lets you define, add and run reports using SYSPRO's Report Writer.

Information







Field	Icon	Description
At a Glance		This lets you view month-to-date totals for your Accounts Payable and Accounts Receivable modules, your current bank balances, General Ledger control balances and posting details for Inventory and Work in Progress.
Quick Find		This lets you perform a detailed search on various categories of information within SYSPRO.
To-Do List		This lets you view a to-do list of tasks from workflow, contact management and notifications.
System Information		This lets you view details of your current system and SYSPRO environment.
Contact Management		This lets you view information about the people with whom you do business.

Web Site



Field	Icon	Description
Visit corporate site		This loads the SYSPRO corporate web site.
Visit InfoZone		This loads the SYSPRO InfoZone support web site.
Visit support		This lets you access the SYSPRO support web site for the latest product information and releases.







Administration







Administration

Field	Icon	Description						
Reindex Files		This maintains the integrity of your SYSPRO files.						
Logout Users		This identifies who is accessing the system, what programs are currently running and to log users out from the system.						
Company Calendar		This lets you view a traditional monthly calendar from which date selections can be made and passed through to SYSPRO programs.						
Automation Design		This indicates which programs you want to run automatically as well as defining the default values to use when these programs are run.						
System-wide Personalization		This defines system-wide options applicable to the SYSPRO workspace for all companies.						
Diagnostics		<table border="1"> <tr> <td>Diagnostics Manager</td> <td>This lets you decide when checks must be performed as well as configures the system to fix some problems automatically.</td> </tr> <tr> <td>Show Events Window</td> <td>This lets you trace all events that occur in the normal running of SYSPRO and output a debug file.</td> </tr> <tr> <td>Show OnLoad event firing</td> <td></td> </tr> </table>	Diagnostics Manager	This lets you decide when checks must be performed as well as configures the system to fix some problems automatically.	Show Events Window	This lets you trace all events that occur in the normal running of SYSPRO and output a debug file.	Show OnLoad event firing	
		Diagnostics Manager	This lets you decide when checks must be performed as well as configures the system to fix some problems automatically.					
		Show Events Window	This lets you trace all events that occur in the normal running of SYSPRO and output a debug file.					
Show OnLoad event firing								





Customization

Field	Icon	Description
Design UI Layouts		This lets you pre-configure and control the user interface that is presented to a SYSPRO operator. The Role layout design option must be enabled against the operator.
Design Menus		This lets you design menus by role, company, group, operator, or system-wide. These menus are shown in the Navigation Pane .

Field	Icon	Description												
Customize Task Dialogs		This lets you customize task dialogs system-wide, by company or by operator.												
Design Flow Graphs		This lets you design flow graphs for roles.												
Customization Management		This lets you view and manage various customization layouts applied to operator roles within SYSPRO.												
Role Management		This lets you configure and maintain settings for operator roles.												
Application Builder		This lets you create your own SYSPRO applications using only customized panes.												
Customization Tools		These tools will help you manage the customization of SYSPRO.												
		<table border="1"> <tbody> <tr> <td>Field Properties for All Forms</td> <td>Define properties for selected fields across all forms.</td> </tr> <tr> <td>XAML Markup Editor</td> <td>Open the XAML editor. Here you can view a preview of your XAML code before applying or deploying it.</td> </tr> <tr> <td>Hyperlinks and Exceptions</td> <td>Customize hyperlinks and exceptions.</td> </tr> <tr> <td>Themes for Browser Queries</td> <td>Define or modify the CSS (cascading style sheet) theme to be applied to queries.</td> </tr> <tr> <td>Global Login/Logout VBScript</td> <td>Define a VBScript action that will be executed whenever any operator logs in or out of SYSPRO.</td> </tr> <tr> <td>Upload Files to the Server</td> <td></td> </tr> </tbody> </table>	Field Properties for All Forms	Define properties for selected fields across all forms.	XAML Markup Editor	Open the XAML editor. Here you can view a preview of your XAML code before applying or deploying it.	Hyperlinks and Exceptions	Customize hyperlinks and exceptions.	Themes for Browser Queries	Define or modify the CSS (cascading style sheet) theme to be applied to queries.	Global Login/Logout VBScript	Define a VBScript action that will be executed whenever any operator logs in or out of SYSPRO.	Upload Files to the Server	
Field Properties for All Forms	Define properties for selected fields across all forms.													
XAML Markup Editor	Open the XAML editor. Here you can view a preview of your XAML code before applying or deploying it.													
Hyperlinks and Exceptions	Customize hyperlinks and exceptions.													
Themes for Browser Queries	Define or modify the CSS (cascading style sheet) theme to be applied to queries.													
Global Login/Logout VBScript	Define a VBScript action that will be executed whenever any operator logs in or out of SYSPRO.													
Upload Files to the Server														

Field	Icon	Description
Search Windows		This lets you create your own search windows for key fields. This facility is now deprecated and replaced by the Advanced Browse.
Event Management		This lets you configure events that you want to monitor within SYSPRO as they occur.
Trigger Programs		This lets you invoke third-party applications (developed in an appropriate language) when a particular trigger is activated in SYSPRO (e.g. after adding a customer).
Custom Forms		This lets you indicate the item for which you want to define a custom form and to which you want to add custom fields.
SYSPRO App Store		This lets you activate or view apps you have purchased from the SYSPRO App Store.
App User Allocation		This lets you allocate users to applications purchased on the App Store.

Espresso

Field	Icon	Description
User Licenses		This lets you define who is allowed to login to Espresso.
Design Menus		This lets you design menus for any device by company, role, or operator.
Push Notifications		This lets you create and send messages to any device by role, by operator, or broadcast to everyone.
App Manager		This lets you deploy applications and components purchased from the SYSPRO App Store.

Status Bar

Exploring

Where it fits in?

The **Status Bar** provides quick access to additional functions within SYSPRO. These include links to selecting a default printer, toggling the print preview facility, viewing companies, viewing operators and switching operator roles.

Navigation

- The **Status Bar** is located at the base of the SYSPRO Desktop.



You can configure your SYSPRO environment options to show or hide the status bar using the **Personalize** program (*SYSPRO Ribbon bar > Home > Personalization*)

Referencing

Customize Status Bar

Right-click the status bar to display a shortcut menu that enables you to select/deselect the items you want to display on the status bar.

Field	Description
SYSPRO 8	<p>This indicates the current version and release of the software you have loaded.</p> <p>Select it to link to help information for this version of the software. You can control the launch of help from the status bar by toggling the Launch help from status bar option:</p> <ul style="list-style-type: none"> Using the Personalize function (<i>SYSPRO Ribbon bar > Home > Personalization</i>) applies this only to your operator code. Using the System-wide Personalization program applies this to everyone in your organization.
Printer:{undefined}	This indicates your current default printer. Select it to change printers.
Preview on	Toggles the print preview for reports.
Document preview on	Toggles the print preview for documents.
Date	This indicates the default date that will be used for transactions. Select it to change the date or to set a temporary date for transactions.
View operators	This indicates the name of the current operator. Select it to access the Operator Browse program.
Company:	This indicates your current company. Select it to access the Company Maintenance program. You can configure your SYSPRO environment options to associate an icon with the current company on the status bar for visual identification purposes (Personalize option - <i>SYSPRO Ribbon bar > Home > Personalization</i>).
Role	This indicates your current role, if more than one role is assigned to your operator code. Select it to switch roles.

Tasks

Exploring

Where it fits in?

The **Tasks** SYSPRO Desktop function lets you create a checklist of tasks that you want to schedule for running on a particular day(s) in a specific sequence.

These tasks relate to the launching of programs, reports, or other applications and can be automated using task groups.

Navigation

- The **Tasks** SYSPRO Desktop function is located on the right of the main menu as a fly-out pane. You can pin this pane to the desktop or auto hide the pane (the default).

Using

- Tasks can be configured system-wide or company-specific. This is defined against the **Tasks** tab of the **Personalize** functions. Company-specific tasks are only marked as complete in the company in which they are defined.

Automation

- If a program is not listed in the **Automation Design** list view and you have not defined Automation form values, then the operator will have to make the necessary screen selections when the program is invoked.

Programs located in either `IMPAUT.IMP` or `CUSAUT.IMP` (in the `CUSPROGS` folder) can be run using automation.

Passwords

- SYSPRO automation does not process a request when a password is required. It exits and displays a task message. The reason for this is that only information on a form can be defined as a parameter to an automated task.

If a password is required, then you can use `SYSPROAuto.EXE` instead. Otherwise, use the security for roles, groups, operator activities, or eSignatures to ensure that only authorized operators can run the task without the use of a password.

Parameters

You can add parameters to SYSPRO programs.

Parameter	Usage
RUN=GroupName	<p>This applies if you used the Automation Design program to add the program to a group.</p> <p>This will run the program (without operator intervention) using the default form values for the program as defined in the <code>\Base\Settings\Automation\GroupName</code> folder of your application server.</p> <p>For example: If you used the Automation Design program to add <code>APSP01</code> to a Group called <code>Balance</code>, then you can enter <code>APSP01 RUN=Balance</code> to run the <code>APSP01</code> program without operator intervention.</p> <p>This uses the default form values in the <code>FormValues_APSP01LV.xml</code> file located in the <code>Base\Settings\Automation\Balance</code> folder.</p>

Parameter	Usage
RUN	<p>This parameter applies if you did not use the Automation Design program to add the program to a group.</p> <p>This runs the program (without operator intervention) using the default form values for the program located in the <code>Base\Settings\</code> folder on the application server (e.g. you logged into SYSPRO as an administrator and entered <code>APSP01 DESIGN</code> using the <i>File->Run</i> program).</p> <p>If the Load Previous Form Values option is used to define form values after the form values were defined using Design mode, then the Design mode form values can be overwritten. This happens when the program name and operator code are identical.</p> <p>The Load Previous Form Values and the Save Form Values options both save the form values to the same file in the <code>\Base\Settings</code> folder.</p>

Form fields

You can change the values of form fields for automatable programs on the command line, as well as apply a pre-configured form.

For example:

The command:

```
INVP01 RUN=Myform;FIFO VALUATION=1;warehouse selection=1;warehouse=E;
```

- launches the **Inventory Period End** program and automatically applies the form fields from the saved form automation file (`Myform.XML`)
- enables the **FIFO Valuation** form field
- selects **Single** at the **Warehouse selection** field
- sets the Warehouse to **E**.

These form changes are applied before the program processing begins.

If you haven't pre-configured any form values, you can leave the `RUN=` parameter blank (e.g. `INVP01 RUN=;FIFO VALUATION=1;warehouse selection=1;warehouse=E;` will change the FIFO Valuation, Warehouse selection and Warehouse form values.



Date values should be passed in the format `CCMMYYDD` and can optionally contain the wording `{today}` to indicate the current system date (e.g. `ARSP80`

```
RUN=;reporting date={today};and ARSP80 RUN=;reporting date=20151201;close this application=1;
```


Check box fields can be set to 1 (checked) or 0 (unchecked).



Radio buttons can be set using a numeric value from 0 upwards (e.g. if there are four radio buttons and you want the third button to be set, then you must pass the value 2).

Referencing

Shortcut menu

Field	Description										
Click here to add a new task group	<p>This is displayed if no task groups are currently defined.</p> <p>Right-click this line to display a shortcut menu of options you can choose:</p> <table border="1"> <tbody> <tr> <td>Edit Task Group</td> <td>This lets you maintain the details for the task group.</td> </tr> <tr> <td>New Task Group</td> <td>This lets you add a new task group.</td> </tr> <tr> <td>Delete Task Group</td> <td> <p>This lets you delete the currently highlighted task group.</p> <p>All tasks in the group are also deleted.</p> </td> </tr> <tr> <td>Copy Task Group</td> <td>This lets you copy the currently highlighted task group to another operator or company.</td> </tr> <tr> <td>New Task</td> <td>This lets you add a new task to the currently highlighted task group.</td> </tr> </tbody> </table> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Task groups are saved in the AdmTaskGroup table of the SQL database while the task lists are saved in the AdmTaskItem table.</p> <p>The form values used when running the tasks are saved on the server in the <code>\Base\Settings\Automation\SYSTEM</code> folder.</p> </div>	Edit Task Group	This lets you maintain the details for the task group.	New Task Group	This lets you add a new task group.	Delete Task Group	<p>This lets you delete the currently highlighted task group.</p> <p>All tasks in the group are also deleted.</p>	Copy Task Group	This lets you copy the currently highlighted task group to another operator or company.	New Task	This lets you add a new task to the currently highlighted task group.
Edit Task Group	This lets you maintain the details for the task group.										
New Task Group	This lets you add a new task group.										
Delete Task Group	<p>This lets you delete the currently highlighted task group.</p> <p>All tasks in the group are also deleted.</p>										
Copy Task Group	This lets you copy the currently highlighted task group to another operator or company.										
New Task	This lets you add a new task to the currently highlighted task group.										

New Task - General tab

Field	Description
Task	<p>Enter a name or title for the task.</p> <p>This description is displayed in the Task List pane and the Tasks Now Due pane.</p>
Start date	<p>Enter the date from which the task must be run. This defaults to the current system date, but can be changed.</p> <p>If you select to run the task once only, then this is the date on which the task must be run.</p>

Field	Description
Comment	<p>Enter a comment to assign to the task.</p> <p>This comment is inserted into the body of the task that is created in Outlook's task manager, if you select the option to insert the task into Microsoft Outlook.</p> <p>You can create a task item that is just a comment, (i.e. you do not need to associate a program with the task). For example: you can create a task that simply defines the procedure: 'Change the paper in the printer.'</p>
Program details	<p>Select program</p> <p>This loads a shortcut wizard to select the program this task must run.</p> <p>Depending on the type of program item you select to add, you will need to define additional information such as a name for the shortcut, the icon you want to use and the location of the program executable file (if not a standard SYSPRO program). Program types include:</p> <ul style="list-style-type: none"> ▪ SYSPRO program ▪ SYSPRO customized report ▪ Any custom program ▪ Any other application ▪ SYSPRO Reporting Service report <p>Program</p> <p>This indicates the program you selected to run.</p> <p>Description</p> <p>This indicates the description for the program.</p> <p>Automation form values</p> <p>These options are only enabled if the program you selected is listed in the Automation Design list view.</p> <p>They add parameters to the program name in the Program field so that the program can be run without operator intervention.</p>

Field	Description
	<p>Group name</p> <p>Enter the name of the group to which the program belongs, that you want to run. You cannot design a form for a task if the group name is blank.</p> <p>A single program can be linked to more than one group and you can define different default form values for the program in each group.</p>
	<p>Define Form</p> <p>This lets you indicate the form values you want to use when running the program.</p> <p>Although you can also define these form values using the Automation Design program, the changes made here will overwrite those values.</p> <p>A folder for each group name defined is created in your <code>\Base\Settings\Automation</code> folder on your application server. Each program linked to a group is listed within this folder as: <code>FormValues_program nameLV.xml</code> (e.g. <code>FormValues_GENP01LV.xml</code>). These files contain the default values you defined for running the program automatically.</p>
	<p>Automation Design</p> <p>Select this to use the Automation Design program to view the groups currently defined.</p> <p>Run this task using automation</p> <p>Select this to add the Group name to the <code>RUN=</code> parameter in the Program field. This enables the program to be run automatically without operator intervention.</p> <p>The group parameter is only added to the program name if no group parameter currently exists against it (i.e. this function will not overwrite an existing group name).</p>


Field	Description						
Task order	<p>You need to indicate the task order if you add a new task where items already exist for the task group.</p> <p>Tasks can be re-ordered by selecting either the Move up or Move down options in the Task Details list view.</p> <table border="1"> <tr> <td>Add this task after last task for this date</td> <td>This lets you add this task after the last task having the same date as this task.</td> </tr> <tr> <td>Insert after</td> <td>This lets you insert this task after the task selected from the pulldown menu.</td> </tr> <tr> <td>Insert before</td> <td>This lets you insert this task before the task selected from the pulldown menu.</td> </tr> </table>	Add this task after last task for this date	This lets you add this task after the last task having the same date as this task.	Insert after	This lets you insert this task after the task selected from the pulldown menu.	Insert before	This lets you insert this task before the task selected from the pulldown menu.
Add this task after last task for this date	This lets you add this task after the last task having the same date as this task.						
Insert after	This lets you insert this task after the task selected from the pulldown menu.						
Insert before	This lets you insert this task before the task selected from the pulldown menu.						
Set reminder if due	<p>This reminds you when the task is due (i.e. for any task that is not yet complete where the start date is on or before the current system date).</p> <p>You can configure the system to remind you of any due tasks when SYSPRO is loaded (see Personalize).</p>						
Insert into Microsoft Outlook	<p>Select this to integrate SYSPRO's Task List with the task list of Microsoft Outlook.</p> <p>Tasks are inserted into the <code>Tasks</code> folder of Outlook (within the <code>Personal Folders</code> parent folder).</p> <p>No tasks are inserted if SYSPRO is unable to locate these folders.</p> <p>The description of the task is inserted into the Subject column; the start date is inserted into the Due date column of Outlook and the comment is inserted into the body of the task list.</p>						

New Task - Recurring tab

This lets you indicate how often you want to run a task.



The system does not use the **Company Calendar** to validate whether the current day is a working or non-working day (i.e. If you set a task to run on a daily basis it will run on each day, regardless of whether it is a working day).

Field	Description
Task occurs	Once only Select this to perform the task once only.
	Daily Select this to indicate a daily interval for this task to be performed. Enter the number of days on which the task must be performed. For example: If you enter 1 here, then the task is performed every day. If you enter 2, then the task is performed every second day, etc.
	Weekly Select this to indicate a weekly interval for this task to be run. You specify which week and which day of the week you want the task to be performed. For example: If you enter 1 here, then the task is performed every week. If you enter 2, then the task is performed every second week, etc.
	Monthly Select this to indicate a monthly interval for this task to be completed. You can indicate a fixed day of every month, or a specific day of the month.
Start date	This displays the start date for the task as defined on the General tab.
Task next occurs on	This indicates the date on which the task will next be performed. It is automatically calculated based on the Start date entered and the selections made against the Task occurs options. <div style="border: 1px solid #0070c0; border-radius: 10px; padding: 10px;">  <p>If you selected a weekly schedule, then the system assumes the week starts on a Monday. So if, for example, it's a Wednesday when you add the weekly task and you indicate that the task must run on a Friday and a Tuesday, then the task will start running the next week Tuesday (i.e. not on the Friday).</p> </div>

Task Groups

This tree view is displayed once you have added at least one task group and you right-click the item and select the **Edit Task Group** or **New Task Group** options.

Field	Description
Description	Enter a description for the task group you want to add, or the name of the task group you want to copy to another operator.
Automatically run tasks sequentially	<p>This lets you run a series of tasks sequentially, which have the same start date, one after the other.</p> <p>When you exit the program assigned to a task, then the program assigned to the next task is launched automatically.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Pause at each task marked as a 'comment'</p> <p>This lets you force a pause between tasks that are being run sequentially.</p> <p>You would use this if you have included comment type tasks in the task group and you want the system to stop at these tasks. This lets the operator follow an instruction (e.g. change the paper in the printer) before the next task is processed.</p> <p>A task is marked as a comment if no program is assigned to it.</p> <p>A 'comment' task can be inserted between any two tasks in the series.</p> </div>
Automatically check previous task completed	This ensures that tasks are performed in the designated sequence.
Mark tasks as complete after having been run	This lets you place a tick in the Completed column of the Task Details list view when a task is completed.

Field	Description	
Processing options	Suppress error messages	<p>This lets you ignore any error messages displayed during the running of the tasks in the task group.</p> <p>Error messages encountered are written to the report of results created for each task. This report can be emailed to the relevant operator.</p>
	Email log file to operator's email address	<p>This lets you email a report of the tasks that ran (including any error messages encountered) to the operator who ran the task group.</p> <p>Ensure a valid email address is defined against the operator code.</p>
	Stop processing tasks if any errors occur	<p>This lets you prevent further tasks in the task group from being run if any one task fails.</p>
	Automatically do a company lockout	<p>This lets you prevent operators from logging into the system while a task group is running.</p>
Before processing any task group (client/server only)	<p>If you elect to kill processes, then that action is only performed once per each run of SYSPRO (i.e. if you run two or more task groups per SYSPRO session, then the processes are only killed for the first task group run. Thereafter, it is assumed that the processes have been killed and additional task groups will not perform this action again.</p>	
	Do not kill any processes	<p>This lets you avoid terminating any processes before running the tasks in the task group. Selecting this option may result in background processes preventing the task group from running successfully.</p>
	Kill processes for the current company	<p>This lets you terminate all unknown processes in the company from which the task group is being run.</p>
	Kill processes for all companies	<p>This lets you terminate all unknown processes in all your SYSPRO companies.</p>

Field	Description
Copy to another operator	This is only available when you select the Copy Task Group option. Enter the operator code to which the task group must be copied.
Copy to another company	This is only enabled if the task definition option against your operator code is defined as By company (see Personalize). If you copy a task group to an operator whose Task definition is not the same, then the copy is not visible until that operator's Task definition is changed.
More	This is only enabled if the task definition option against your operator code is defined as By company (see Personalize). This function lets you copy one or more task groups to a number of companies using the Copy Tasks program.

Task Details

This displays details of tasks defined for the currently highlighted task group in the **Task Groups** pane.

You can drag a program from the **Program List** or **Recent Programs** list onto this pane to add a new task once a task group has been selected.

Field	Description										
Open	This lets you run the currently highlighted task. Tasks with the same start date will be executed in the sequence in which they appear in this listview.										
New Task	This lets you add a new task to the task group.										
Edit Task	This lets you maintain the details of the currently highlighted task.										
Delete Task	This removes the currently highlighted task from the task group.										
Move Up/Move Down	This lets you move the currently highlighted task up or down. You can only resequence tasks if more than one task with the same start date has been assigned to the task group.										
Print	This lets you print the contents of the Task Details list view.										
Export to Excel	This lets you export the contents of the Task Details list view to an Excel worksheet.										
Listview columns	<table border="1"> <tbody> <tr> <td>Completed</td> <td>This indicates whether the task has been run (i.e. it does not indicate whether a task was successfully completed). If you enabled the Mark tasks as complete after having been run against the task group option then this is automatically set to complete after the task is run.</td> </tr> <tr> <td>Task</td> <td>This indicates the name or title defined against the task.</td> </tr> <tr> <td>Start date</td> <td>This indicates the start date for the task.</td> </tr> <tr> <td>Program</td> <td>This indicates the program that must be run for the task.</td> </tr> <tr> <td>Comment</td> <td>This indicates the comment defined against the task.</td> </tr> </tbody> </table>	Completed	This indicates whether the task has been run (i.e. it does not indicate whether a task was successfully completed). If you enabled the Mark tasks as complete after having been run against the task group option then this is automatically set to complete after the task is run.	Task	This indicates the name or title defined against the task.	Start date	This indicates the start date for the task.	Program	This indicates the program that must be run for the task.	Comment	This indicates the comment defined against the task.
Completed	This indicates whether the task has been run (i.e. it does not indicate whether a task was successfully completed). If you enabled the Mark tasks as complete after having been run against the task group option then this is automatically set to complete after the task is run.										
Task	This indicates the name or title defined against the task.										
Start date	This indicates the start date for the task.										
Program	This indicates the program that must be run for the task.										
Comment	This indicates the comment defined against the task.										

Task Messages

Column	Description
Task group	This indicates the task group under which the task was run.
Task	This indicates the task which was run.
Completed	This indicates whether the task is complete.
Task message	<p>This indicates any message which occurred as a result of running the task.</p> <p>These messages appear on the task report and can be emailed or printed for subsequent analysis.</p>
Program	This indicates the program which was run for the task.
Program description	This indicates the description of the program which was run for the task.

To Do List

Exploring

Where it fits in?

The **To Do List** SYSPRO Desktop function displays activities that require your attention.

Navigation

- The **To Do List** SYSPRO Desktop function is located on the right of the main menu as a fly-out pane. You can pin this pane to the desktop or auto hide the pane (the default).

Using

How it works

- You enable the **To Do List** by selecting the **Click to show To-Do List** option in the **To Do List** pane. This imports and runs the `\Base\Samples\PANE_CMS_REMINDER.TXT` VBScript. Once enabled, a list view is displayed with one row for each outstanding item. The list is refreshed every 60 seconds (Press **F5** to refresh this list manually) and displays three columns:
 - Subject
 - Due in
 - Type

When new items are added to the **To Do List**, a popup is displayed on the Windows task bar for about 10 seconds, indicating the number of new items. When you first load the SYSPRO menu, the popup reminds you of all outstanding items. Thereafter, the popup only appears when new items require your attention.

You can hover your mouse over the popup to show it more clearly and prevent it from disappearing. When you select the **Click here to view your To-Do list hyperlink**, a message is sent to the program currently running (e.g. the SYSPRO menu or any other SYSPRO program) which then loads the **To Do List** program.

You can also invoke the program by double-clicking any of the list view rows shown in the pane. The SYSPRO Ribbon bar includes a **To Do List** button (selected from the **Query** tab) that loads the **To Do List** program.

Contact Reminders

When adding or maintaining activities using the **Contact Activity Posting** program, you can set a reminder period against appointment and meeting type activities.

The contents of the **To Do List** pane is updated every minute, but you can use the **Refresh** option to update the information immediately.



- A link must exist between your operator code and a contact in SYSPRO in order for you to be able to see appointments and meetings within the SYSPRO calendar. When you initially set up the Contact Management System, a wizard creates a contact for each operator by default. You use **Operator Maintenance** program to link operators to contacts (and delink them).
- If you are running a second or subsequent instance of SYSPRO you will not receive Popup reminders for those non-primary instances. The non-primary instances display the message 'Contact reminders only for prime instance'.



- You can view your reminders from these non-primary instances using the **Contact Management Query** program. Alternatively, you can simply view the contact reminders on the primary instance.

If the **To Do List** item was generated from the Contact Management System, each item has an **Open**, **Dismiss** and **Snooze** action available:

- **Open**
This enables you to view the activity in the **Contact Activity Posting** program.
- **Dismiss**
This clears the follow-up flag against the activity (and therefore removes it from the list).
- **Snooze**
This allows you to set the follow-up date/time (typically also removing it from the list).

You can click on the **Open** and **Dismiss** hyperlink against the item to perform the action required. Alternatively you can click on the item (or use the cursor to highlight an item) and then use the **Open**, **Dismiss** or **Snooze** toolbar buttons to perform the required action.

[Note]



The **Dismiss** function always requests you to confirm this action.

Workflow Tasks

If the **To Do List** item was generated from SYSPRO Workflow Services (SWS), then each item will have one or more actions available, depending on the type of workflow task (e.g. a Workflow Task could have Approve and Reject actions).

The first three available actions are shown as hyperlinks in the **Action 1**, **Action 2** and **Action 3** list view columns. However if there are more than three actions for a single Workflow Task, then the third hyperlink shows **More...** and when selected, will display the **Actions** pane to lists all available actions for the current task. You can then click on one of the available hyperlinks within the **Actions** pane.

The actual functionality performed when clicking on a Workflow Task hyperlink depends on the pre-defined action configured at the time the Workflow Task was added.

This can include a simple **Dismiss** function that just marks the Task as complete, or it can:

- run a SYSPRO program
- run a VBScript
- run a .NET assembly
- run any executable
- notify the Workflow system that the action has been performed.



Dismiss All

The **Dismiss All** action allows you to dismiss all dismissible items. The dismiss action is performed on each item that has an available dismiss action (e.g. Contact Reminders or Workflow Tasks).

Tutorial Player

Exploring

Where it fits in?

The **Tutorial Player** SYSPRO Desktop function lets you embed video clips within the product that can be deployed as learning tools across your organization.

You can create your own clips and embed them in the product, or you could include the product feature demos that SYSPRO has published on the web.

Navigation

- By default, the tutorials window is available to run from the **Favorites** pane in SYSPRO. However, you can embed the tutorials window in any SYSPRO pane by right-clicking the title bar of a pane and selecting the **Customized Pane** option. Select **Add Tutorial Player** from the shortcut menu displayed, to open the video viewer. You can dock the window to any pane and control the visibility of the pane using the **Auto Hide** option.

Starting

Restrictions and Limits

File name considerations

- The files need to be saved in a Windows Media Video (.wmv) or MPEG-4 (.mp4) file format.
- The files need to be stored in the `Base\Samples` folder of your SYSPRO installation.
- The file names must be prefixed by `howto` (e.g. `howto_sample_video.wmv`).

Self-healing considerations

- The video files are self-healed to the client, so we recommend you keep the file sizes to a minimum to reduce the impact on network bandwidth.



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