

Roaming Users

SYSPRO 8 Technical Article

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SYSPRO Help and Reference

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Introduction to Roaming Users

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

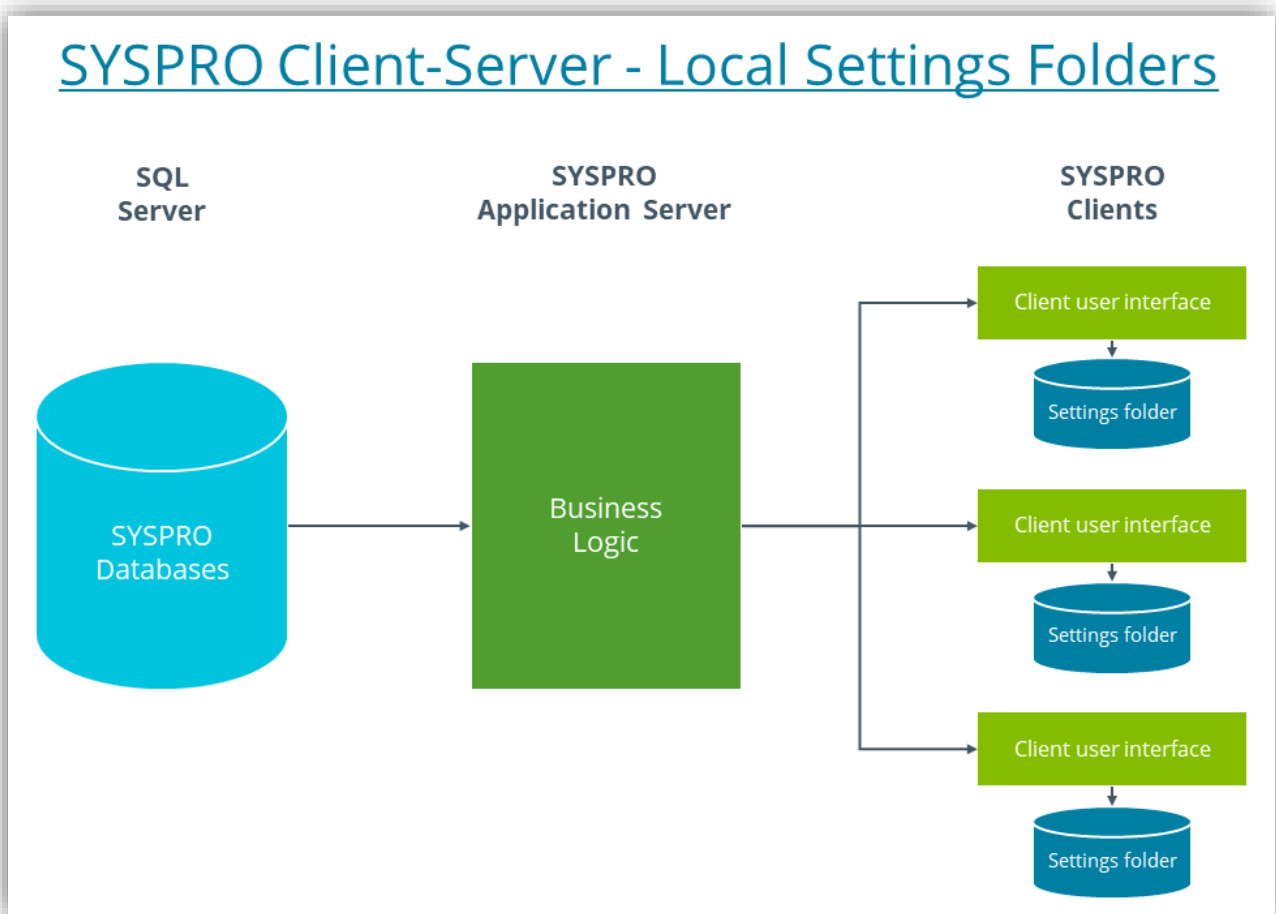
Whether a physical Windows PC or a Virtual PC, the SYSPRO client software reads and saves preferences into a local **'Settings'** folder.


For example:

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

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

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





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

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

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

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

It should be noted that from **SYSPRO 8 2020 R2** (September 2020) there is a new system-wide option that will persist your preferences in the `Settings` folder into SQL Server.

You simply need to enable the system-wide settings and, once each user has logged in and out, their settings will have been migrated to SQL Server.

When they next login, their own personalized settings will be read from SQL Server and used as normal.

When they logout of SYSPRO, their personalized settings are saved in the database.

See the option displayed as follows:

Setup Options: Demo for Carol (EDU1)

Save Save and Exit Cancel Company: EDU1 - Demo for Carol Functions Define Information

Quick search ?

Categories

- Configuration
- Preferences
- Financial Periods
- Tax
- History
- User-defined Fields
- Keys
- Company
- General Ledger Integration
- System Setup**
 - General
 - Login
 - SQL
 - Reporting
 - E.Net Service Details
 - Connectivity
 - Rules Engine/Harmony
 - Artificial Intelligence
 - Password Definition
 - System-Wide Personalization**

System Setup > System-Wide Personalization

Restore defaults [Restore](#)

Theme

- Enable minimalist user interface
- Overall theme Not set by administrator
- Apply Ribbon Bar Not set by administrator
- Ribbon style Not set by administrator

Workspace

- Use Predictive Search
- Show toolbar navigation buttons
- Enable Task Dialog customization
- Enable Toast Notifications
- Toast Notifications delay 4
- Close Toast Notification when typing
- Web Browser emulates highest IE version
- Save primary window settings upon exit
- Validate G/L sections as you type Not set by administrator
- Display G/L sections as drop-down list Not set by administrator
- Launch help from status bar Not set by administrator
- Show system-wide view when logging in
- Show role view when logging in
- Enable roaming users
- Persist operator UI settings to SQL**

Forms

Persist operator UI settings to SQL

These UI files are located in ...base\settings and contain personalized views of toolbars, charts etc. Enabling this option means these files will be stored in a SQL database for backup purposes.



How does Roaming Users work?

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

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

Once configured, the refreshing and uploading occurs automatically.

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

How do I setup Roaming Users?

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

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

SETTING UP ROAMING USERS IN WINDOWS

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

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

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

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

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

User profile disks have several advantages:

- Configuration and deployment are simpler than roaming profiles or folder redirection.
- User profiles can be maintained even on pooled virtual desktops that get rolled back after logoff.
- Logon and logoff times are reduced.
- Previously, profiles could be corrupted if used simultaneously on multiple computers. User profile disks are specific to the collection, so they can't be used on multiple computers simultaneously.

- Administrators can have granular control of exactly which locations get saved to the virtual hard disk (VHDX).
- User profile disks can be stored on Server Message Block (SMB) shares, cluster shared volumes, SANs, or local storage.
- In pooled virtual desktop collections, user profile disks work with virtual machines running both Windows 10, Windows 8 and Windows 7 with Service Pack 1 (SP1).

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

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

ROAMING PROFILES AND ALTERNATE SYSPRO SETUP

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

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

Note: This document describes an older method of configuring SYSPRO to enable roaming users.

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

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

SETTING UP USER PROFILE DISKS

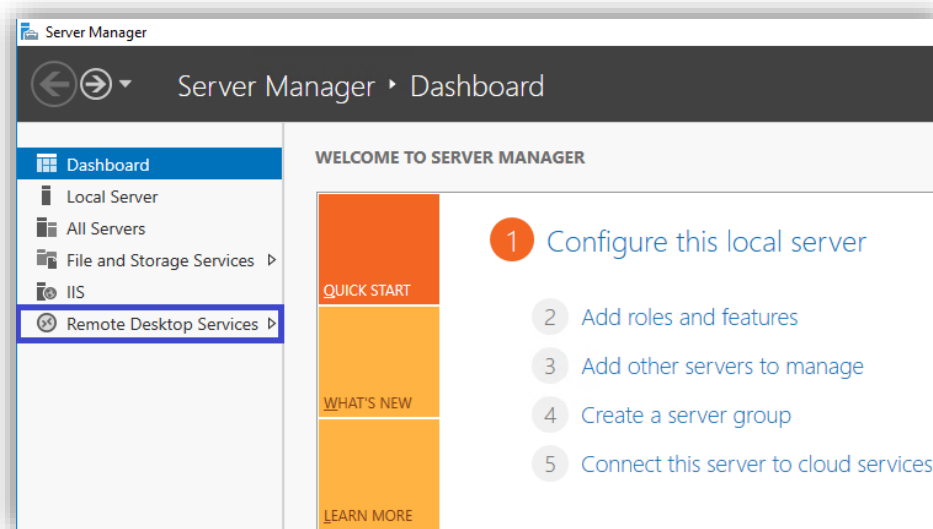
The following is a summary of the steps that can be used to setup user profile disks – the details will depend on your own environment.

Considerations:

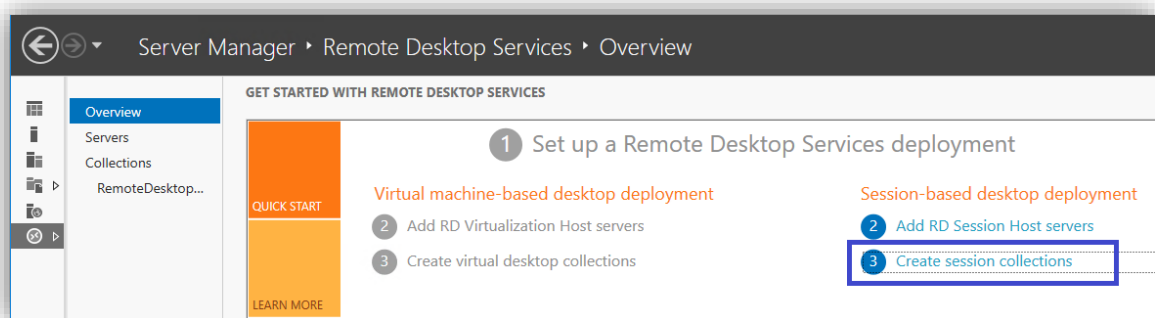
- The screen images were generated on Windows Server 2016 – other versions of Windows may have different dialogs. Please refer to the relevant documentation on the internet to match your server environment.

Process:

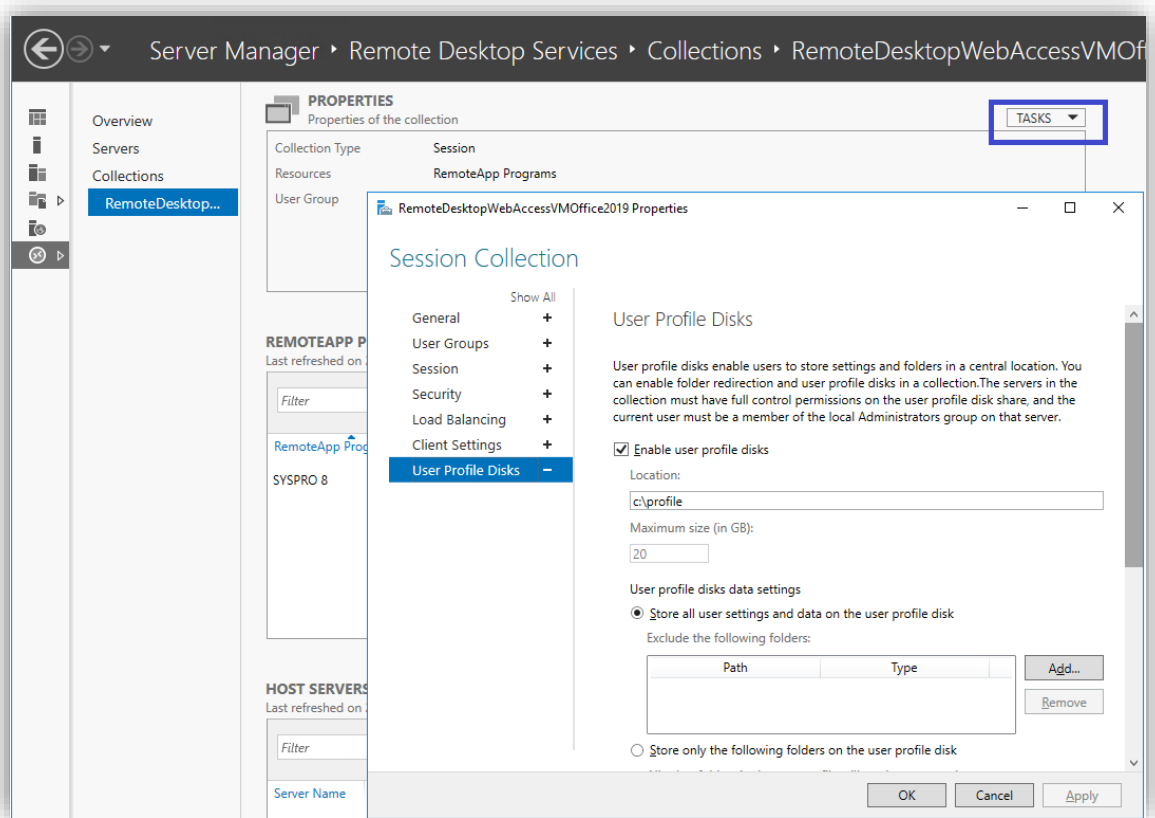
1. Use the **Server Manager** dashboard to configure user profile disks.
Note: Many of the tasks listed below require you to be a domain administrator.
2. If the **'Remote Desktop Services'** menu option (highlighted in blue below) is not available on your dashboard, you should use the **'Add roles and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



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



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



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

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

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

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

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

CONFIGURING ROAMING USERS IN SYSPRO

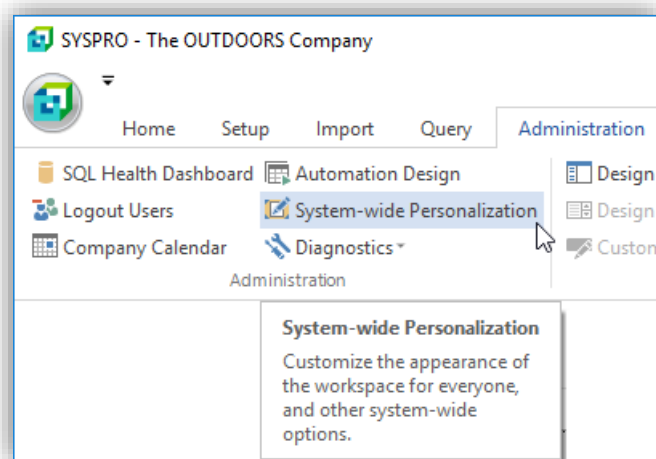
SYSPRO 8 has been updated for 2019 R1 (released February 2019) to simplify setting up a **Roaming Users** environment.

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

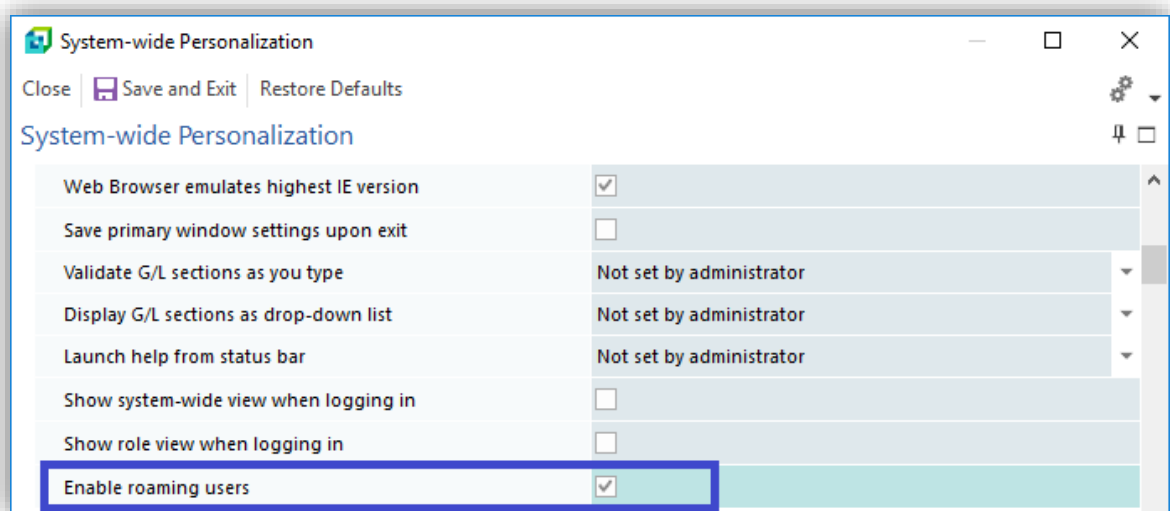
Note: Prior to **SYSPRO 8 2019 R1**, the only method of setting up SYSPRO to store its 'Settings' folder in the user's application data folder was to edit a registry entry on each client. This technology is still supported for backward compatibility and is described more fully in the technical guide: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

Process:

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

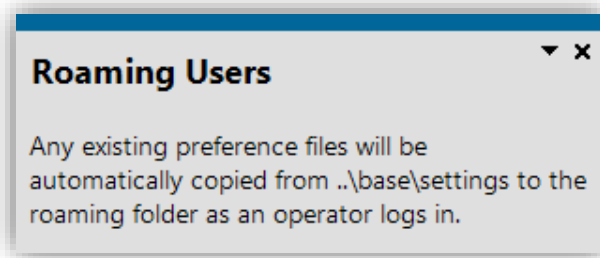


2. Locate the 'Enable roaming users' preference and enable this option:



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

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



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

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

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

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

This message will only occur once for each user:





Once configured, the Roaming User logic works as follows:

1. Login to Windows

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

2. Login to SYSPRO

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

3. SYSPRO application usage

The user performs transactions and other SYSPRO functions which could include changing personal preferences. Some of these are immediately persisted to the '**Settings**' folder.

4. Logout of SYSPRO

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

5. Logout of Windows

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

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



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