SYSPRO Avanti Overview Guide

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SYSPRO Ltd.

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WHAT'S CHANGED?

Synopsis	Read more
No changes to guide since SYSPRO 8 2023	

ANNOTATION

This document provides information about SYSPRO Avanti, the web-based version of SYSPRO. For the remainder of this document SYSPRO Avanti is referred to as Avanti.

The contents of this document are subject to change.

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INTRODUCING SYSPRO AVANTI

Avanti is SYSPRO's web-based offering.

Avanti (an Italian word meaning *forward* or *ahead*) is designed to run SYSPRO's applications in the private or public cloud, but Avanti can also be deployed on premise.

Avanti can be used in parallel with the SYSPRO Windows Client version, allowing a user to use either Avanti or the Windows client version to complete the same task.

Being a native web application, Avanti is accessible on any device, on any platform, from anywhere.

RUNNING AVANTI ON THE DESKTOP



RUNNING AVANTI ON THE IPHONE



AVANTI'S BENEFITS

Users may selectively deploy either Windows or the web-based solution.

A dual user interface provides customers with the ability to select the best UI for the specific task at hand.

Familiarity

For customers used to the SYSPRO Windows client version, Avanti will be quite familiar as the behavior of the applications is designed to be similar.

Ease of deployment

Avanti does not require any installation on the Windows desktop or device. All that is required is a web browser.

Consistent design across all applications

Avanti is designed to be intuitive and easy to navigate, with consistent layouts that make it easier for users to become quickly adept at the execution of tasks, and with a minimum of clicks to complete tasks.

Tailoring

Avanti has a **Visual Designer** that allows administrators to change the layout of any application, and to add or remove functionality. This allows customers to streamline any operation. Additionally, some of the customization implemented in the same SYSPRO Windows client application will be automatically applied in Avanti.

Avanti also allows users to create completely new functionality and to have this available in Avanti.

THE DIFFERENCES BETWEEN AVANTI AND ESPRESSO

While SYSPRO Espresso and SYSPRO Avanti have similar characteristics (they are browser-based applications, and both were created using modern web technologies), the two products are designed for different types of users.

Espresso is specifically targeted at mobile workers who don't require the full and complex functionality of SYSPRO but require offline capability.

Avanti is aimed at users who require the full-featured functionality of SYSPRO but want to access it from a browser.

SYSPRO Espresso	SYSPRO Avanti
Natively designed for mobile devices	Natively designed for the browser
User experience optimized for mobile devices	User experience optimized for the browser
Offline capability	No offline capability
Applications are purpose-built and require development effort	Applications are created using the Visual Designer and require no development effort
Espresso is charged by user logon	User access is based on the concurrent SYSPRO user license
Espresso applications may be chargeable and are licensed by user count	Any application in SYSPRO may be available in Avanti as part of the concurrent licensing

USER INTERFACE

Avanti's design guidelines provide a consistent and intuitive user interface.

Action buttons are always located on the right of the toolbar of the current application:

≡ ósyspR0'Avanti	Home > Receipts				Q Phil
Warehouse * Stock code *	E Eastern Warehouse A100	م م	Transaction details 0 Receipts posted	0.00 Receipts value	
Quantity *	UNIRAK BOX BEAM 1.5" X 2.5" X 48"		Stock information		^
Receipt cost *	349.96899		Stock on hand	2233203/00	
Cost uom	BOX		Stock available	-119126108/00	
Cost basis	Unit O Total		Stock free	2233187/00	
Multiple bins	Edit	Q	In transit Allocated	100/00 121359311/00	
Lot Lot expiry date	0000-00-00		On order	1200/00	
Reference			On back order	121359295/00	
Notation			In inspection	0/00	
Ledger code	30-2010	Q	Cost uom	BOX	
			Current cost	349.96899	
			Journal entries		~

Entry fields on the toolbar are located on the left:



Descriptions for form fields appear beneath the key value:

SYSPRO'Ava	anti Home > Wareł	houses						Q	e Ph
arehouse E			And the second second				•	8 1	i ¢
escription *	Eastern Warehouse		Options						~
osting level	Company	-	⊞ GL accounts						~
osting method ultiple bins in use xed bins in use egative stock lowed ext stock take cket number	No ····································	• • •	Warehouse control 30-1520 Warehouse Control - East Warehouse variance 30-5811 Warehouse Variance - East GRN suspense	م م	Goods in transit control 30-1540 Inventory in Transit - East Dispatched but not invoiced 30-1130 Unbilled Dispatches - East Automatically cleared variance		WIP inspection Work in progress WIP variance		৫ ৫ ৫
Delivery Addre	255	~	30-2010 GRN Suspense - East Ⅲ Numbering	_ Q		2			~

Toast notifications provide unobtrusive messages if entries are not correct:



TAILORING AVANTI

DESIGNING APPLICATIONS

You can use the **Visual Designer** in either Avanti or the Windows client version to design applications for use in Avanti.

In Avanti, click on the Settings icon at the top right of the page to design the view:



The **Visual Designer** displays the current layout.

You can add or remove components, or start from new to design your own view:

Add toolbar item Customer Query Stock Query	🕒 Add toolbar item 🛛 Refresh WebView
nuu tooloon teimii custonnei queryi suockiquery	
Add layout section	🖪 Add layout section
6	User Sessions
Program tiles 🗐 Program tiles 🗐 Program tiles 🗐 Program tile	

Note:If you wish to design applications at the Role level or SYSTEM-WIDE level, then you must be in
Design Mode within the SYSPRO Windows client version. You can then launch an application in
SYSPRO Windows client and select the option to Design Web View from the settings icon:

		-	
			? - ₽
		Panes	+
		Cards	
Anufacturing Report	Persona	Edit Web View	
- Queue	Р	Customization Profiler	
ICS F		Reset Layout	
		Hide Web View	F11
		Show Pane Titles	F12
Bank Query	Ð	Hide Pin Buttons	
Dalik Quely		Show List View Toolbar	
		Auto Close Floating Panes in \	Veb Views
			_

Designing applications is simply a matter of selecting the Form field, Grid list, Tile or Card and add it to the layout. There is no development coding required by the user to design layouts.

Note: To design a web view the operator security option **VBScript editing** must be enabled:

<u>F</u> ile				
Accept a	nd Close		â	۰.
Available				
Allowed	Activity description	Sequ e.net specific a	M 🔺 Activity nu	^
×	Custom form entry	094	Custo 053	-
×	Listview/Forms - Export or print data	095	Custo 075	
×	Forms - Customization by operator	096	Custo 103	
~	Toolbars - Customization by operator	097	Custo 250	
	VBScript editing / Design Web Views / Design Customized Panes	098	Custo 606	
✓	Docking panes - do not prompt when removing windows	099	Custo 253	
V	Save docking layout when using roles / industry / system-wide	100	Custo 247	
	Items:385			Ϊ.

Once you have designed your own web view, you can always delete the web view, either by using the **Visual Designer** in SYSPRO, or when you click on the Settings icon in Avanti the option **Delete Web View** will appear beneath **Design Web View**.

ADDING TOOLBAR ITEMS TO A WEB VIEW

To add a toolbar item to a web view:

Select the **Add toolbar item** option from the left-hand side of the **Visual Designer** to add items to the left-hand side of your web view. Likewise, there is an identical button for the right-hand side of the **Visual Designer**.

Note: Toolbar buttons correspond to their equivalent in the core SYSPRO product.

For this explanation, we'll use the **Customer Query** program (i.e. ARSPEN).

This program has 2 primary toolbars on the main window:

- The top toolbar (known as the **MenuBar**)
- A main toolbar (labelled CustomerQuery) that contains the Customer entry and other toolbar items.

Notice the **Preferences** button is a dropdown button containing multiple item levels:

🛃 AR Customer Query						×	
File Options Query							
Customer: 🗾 🗸 🖌 Prev 🕨 Ne	ext 🕨 🔍 Preferences 🛛 🏰 Find 😥 Edit 🦉	Notes 👻 🔠 Contac	ts Print	Stater	ment	å .	
Customer Information	Ageing selection	· 1				џ ×	
 Customer details 	Include retained invoices	ies Show				~	
	Ageing method	,					
	Balances as of	> Show					
Customer Bitmap image	View invoices and payments	► Show					
	Foreign customer values	>					
	Convert to local value at	→ [Clear
Customer	Display sequence	 Invoices 	•	•	Earliest		
Name	 Additional t 	teleph Movemer	nts ⊧		1 - 4 - 4		
Create sales order	Fax	Dunning	Þ		Earliest	invoices	displayed first

When you add a toolbar item in the **Visual Designer** for Avanti, you will be presented with this window, which displays the various toolbars that can be found in the **Customer Query** application:

Search for a field		
Select item	-	
CustomerQuery		
MenuBar		
ToolbarAction		
or		
Dropdown Menu		
Off-canvas section		
	-	

There are 3 items displayed:

CustomerQuery

This contains the toolbar items for the main toolbar on the main Customer Query window.

MenuBar

This contains toolbar items located in the menu bar on the main Customer Query window.

ToolbarAction

This contains toolbar items in toolbars associated with forms. In Customer Query some forms have specific toolbars linked to the form itself.

If you select **CustomerQuery**, you will be presented with an alphabetical list of all the toolbar items found in this toolbar:

Add toolbar item	
1 Select item to add:	
Search for a field	
< All / CustomerQuery	*
Customer	
Customer Notes (Notes)	
Detail (Preferences>View invoices and payments)	
Earliest (Preferences>Display sequence>Invoices)	
Earliest (Preferences>Display sequence>Movements)	
Earliest (Preferences>Display sequence>Dunning)	
Earliest (Preferences>Display sequence>Payments)	
🏠 (Tooltip: Edit)	
Entry time rate (Preferences>Convert to local value at)	
(Tooltip: Find)	
14 /Tooltin: Eirst itom	Ψ.

You will notice that there are different types of toolbar items:

- Those with captions that are located on the main toolbar. An example is the item *Customer*.
- Those that have no caption but have an icon.
 For example, the **BROWSE** button to the right of the Customer field has no caption but has a tooltip of *Browse*, displayed like this:

Q (Tooltip: Browse)

- **Note:** You should not add BROWSE buttons to any toolbar in a web view, as these are automatically catered for using the generic Avanti search capability.
- Those that have icons that are automatically translated to the Avanti equivalent. For example, the **FIND** button in ARSPEN is displayed like this:



Those that located within a popup or subgroup collections.
 An example is the preference option **Earliest**, located beneath the Display sequence for Invoices.

This is represented with the caption followed by the popup hierarchy, as indicated below:

Earliest (Preferences>Display sequence>Invoices)

This makes it much easier to identify the required toolbar item to be added, especially if the caption by itself is not uniquely identifiable.

USING AVANTI

Avanti is a web-based product and as such the user experience differs to that of a Windows client. This section details these differences.

LOGGING INTO AVANTI

	and the second			
	Sigr	ı in		
	O User name			
and the second second	Password			
	Company			
	Company password		-2000 - 10	
	Sign	in		
	Keep me signed in			
	Change password	Forgot password		

The login page for Avanti is similar to that in the Windows client version:

When you login to Avanti, it is equivalent to logging into the Windows client version, in the sense that it uses the same user credentials, and the same concurrency licensing model.

You may use Avanti and the Windows client version at the same time if the user is allowed concurrent use. If you login to Avanti using an operator name that is already logged in (and without the operator setup option **Allow concurrent use of this operator** enabled) then the other operator will be logged out.

Security and other options defined for the user apply equally no matter if you login to Avanti or the Windows client version. Similarly, the security principles and options apply in Avanti for whichever company you select.

MULTI-FACTOR AUTHENTICATION

Multi-Factor Authentication is a process that identifies a user by validating two or more authentication methods from independent credential categories. This ensures that a user is only granted access after successfully presenting two or more pieces of evidence to the authentication mechanism.

Avanti supports Multi-Factor Authentication.

Note: Currently, only the default MFA method defined for an operator can be used when logging into Avanti.

For more information about MFA, view the feature topic on the SYSPRO Online Help website:

SYSPRO Help - Multi-factor Authentication

FORGOT PASSWORD AND CHANGE PASSWORD FUNCTIONS

The **Forgot Password** and **Change Password** functions on the login screen let you reset your SYSPRO password without requiring the assistance of a system administrator.

Forgot Password

Once you select the request a password reset from the login screen, you are then notified via email that a request for a password reset has been received and that the password has been reset. The email includes a temporary password which is valid for a specified period.

When next you log into SYSPRO using the temporary password, you'll need to enter a new password.

Change Password

This function enables you to change your current password and uses the **_ESP** operator in SYSPRO. Therefore, you must ensure that the **Operator locked out** option is disabled for the **_ESP** operator code in the **Operator Maintenance** program (i.e. IMPPMP), or users will receive an error when attempting to change their passwords.

The following options must be configured within the **Setup Options** program (i.e. **IMPCFG**) to use these functions:

Setup Options > System Setup > Connectivity:

Email/SMTP Settings

Setup Options > System Setup > Password Definition:

- Password options
- Forgotten password options
- Notify when login attempt exceeded

PASSWORD PROTECTION IN AVANTI

By default, a timeout of 10 minutes is imposed on any user who logins to Avanti. After this timeout the system will request the operator's password to continue (even if that password is blank).

You can adjust the period of the timeout using the **Setup Options** program (i.e. **IMPCFG**) in SYSPRO or Avanti and adjust the **Timeout before password required** option as you require:

✓ System Setup	Prevent special characters being ent
General	Special characters
Login SQL	Prevent leading spaces
Reporting	SRS Document Printing
E.Net Service Details	Optimize by pre-loading Crystal runt Set at operator level (Per 💌
Connectivity	KeepAlive options
Rules Engine/Harmony	KeepAlive timeout (minutes) 0
Artificial Intelligence	
Password Definition	Communication service
System-Wide Personalization	Client/server open timeout (seconds 30
	 SYSPRO Avanti
	Timeout before password required 0
	Timeout before exiting 0
1	

0.0000					0	-	-	
Comp	EDU1 - The OUTDOO		Functions -	Define -	 Information 		≥	₽
4.5	System Setup							
	General							
	Login							
	SQL							
	Reporting							
	E.Net Service Details							
	Connectivity							
	Rules Engine/Harmony							
	Artificial Intelligence							
	Password Definition	_						
X (Conflict messages							~
¢ (Options							
Addre	ess formatting		Configure					
Time	out before password required		0					
			0					
	out before exiting		ŏ					-
Time								

In addition, you can impose a further timeout (in minutes) after the password window has appeared. If the timeout expires, then Avanti will exit completely back to the Login screen.

In both cases, a timeout value of **0** indicates no timeout.

Note: Against the operator definition is an option for a timeout in menu and queries. This setting is ignored when in Avanti.

LOGGING OUT OF AVANTI

To exit Avanti, simply close the browser, or click on the **Sign out** button to exit Avanti and return to the Logon page (to change to a different company or user).

If you are currently in a transactional application, then you will be prompted if you wish to leave the site.

ACCESSING THE SYSPRO HELP IN AVANTI

If you want to access Help and Reference information, simply press F1 from within Avanti and the SYSPRO Online Help will open in a new browser tab.

Note: The SYSPRO Help is version dependent as this ensures that when you invoke the help from within SYSPRO 8, you are directed to the content appropriate to your current SYSPRO version.

For example, if you are currently using **SYSPRO 8 2021 R2**, then pressing F1 within Avanti will take you to the **SYSPRO 8 2021 R2 Help site**. Whereas if you are using **SYSPRO 8 2023**, pressing F1 takes you to the **SYSPRO 8 2023 Help site**.

NAVIGATING AROUND AVANTI

Applications in Avanti are launched either by clicking on a tile in the **HOME Page** or from the Hamburger Menu options.



The **HOME Page** in Avanti is defined using the **Visual Designer** and can typically contain a mixture of Business Insights, Program Tiles, and Cards.

Unlike the Windows client version, the **HOME Page** in Avanti can be defined at Role level, providing administrators with the ability to decide on the content for users.

If your **HOME Page** has yet to be defined either at the role level or for personal use, then you will be presented with a pre-defined 'default layout', which may look like this:



Once you have defined your own view, it will always be displayed as the default view (labelled **Default layout**).

USING THE HAMBURGER MENU

Clicking on the Menu icon (i.e. the hamburger at the top left of the **HOME Page**) displays a list of available Avanti programs:



You click on a program to run it.

Alternatively, you can add a program to your current web view by either designing the view using the **Visual Designer** or dragging items off the menu directly onto a tile section.



In the above screen shot, the **Suppliers** program (i.e. APSPSP) is being dragged onto the tile section, which then looks like this:



Similarly, you can also drag any Business Insight onto a tile section:



In addition, you can drill down to the detail of any Business Insight simply by clicking on the item, either in the menu list, or by clicking on the 'tile' itself after it has been dragged onto a tile section.

Thus, clicking on the menu item Average days to pay for company:

$\cdot ightarrow {f C}$ (i) file:///C:/RND800/BAS	E/_SYSPR	O_Fusion/Staging/Test	HarnessReleaseBC.html#	ŧ		ବ ★ :
E SYSPRO'Avanti Home > H	Home Men	1				Q 🔒 Phil
	^					с 🌣
Recent programs	>	AR Period End 🔁	45 -			-
Tiles	^	Average days to pay	40			×
□ KPI - Financials	>					A
Average days to pay for company	0	Filter	۳ 💆			
		Drag a column header a	nd drop it here to group by	that column		
Receivables days outstanding for company	()	-			Customer Branch	
Return on assets for company	0	0000001	Bayside Bikes	100	10	
WIP Ledger balance summary	0	0000002	Bikes & Blades - North	100	10	
- KDL Madadaaa di Calaa		0000008	Garden and Sports	102	10	
HPI - Marketing and Sales		0000010	Maniac Sports - North	100	10	
Average YTD invoice value for company	0	0000011	Maniac Sports - South	201	20	
Average YTD invoice value for salesperson	0	0000012	Maniac Sports - East	300	<u>30</u>	
Average invoice value for company	0	0000070	Highway Leisure	700	<u>70</u>	
Average invoice value for company	-	0000071	CC Cycles	700	<u>70</u>	
Average invoice value for customer class	0					
Days since last sale for company	0					
GP margin as percentage of sales for			ni o dojustnenos	3,211.10	0.00	-
ompany	0		MTD debit notes	350.00	0.00	0.00
☐ KPI - Operations			MTD credit notes	-261.286.00	-100.00	-279
WIP at a glance labor cost	0		MTD payments	-30,000.00	-1,608,426.00	-2,26
-	0		MTD discount	0.00	0.00	0.00
WIP at a glance labor issued ///C:/RND800/BASE/_SYSPRO_Fusion/Staging	6		MTD balance	0.00		

...or clicking on the tile itself after it has been dropped into a tile section, will display the insight detail:

Home Menu - SYSPRO A 🗙									
C i file:///C:/RNE	D800/BASE/_SYSPRO_Fusi	on/Staging/TestHarnes	sReleaseBC.htm	nl#				Q	٤ ★
SYSPR0'Avanti Hom	ne 🔰 Home Menu							۹ (\rm Phi
omer Query Inventory Que	ny							G	\$
				1 C		and the second second	and the second		1.200
		od End 🔁						-	
Pay Company: EDU1	Average days to pay						- 0	×	
	Filter	÷ 183						L Î	
41									
41 _{Days}	-	nd drop it here to group by							
Sales Order 🛛 🖻			Salesperson		Customer Branch	1	Age of :	. 11	
Entry	0000001	Bayside Bikes	100		10		75 ^	na	
	0000002	Bikes & Blades - North	100		10		153		~
	0000008	Garden and Sports	102		<u>10</u>		66		
	0000010	Maniac Sports - North	100		10		100		
	0000011	Maniac Sports - South Maniac Sports - East	201		20 30		51		
	0000012	Highway Leisure	300 700		<u>30</u> 70		0		
	0000071	CC Cycles	700		70		0		Pr
	000011	cc cycles	100		10		•	1	3,2 ^
									1,5
								0	0.0
									0.C
							-	. (0.0
	4						×.	0	0.0
						1 - 8 of	f 8 items		-27
	The fact the second sec		MTD payments	-30,00	0.00	-1,608,426.	.00		-2,
			MTD discount	0.00		0.00		(0.0
			MTD balance	0.00		0.00			0.0 🖵

Note: As soon as you have dragged a program or business insight onto a tile section, Avanti will save that view for you. If you are in the **HOME Page**, then this will now become your personal view. If you wish to adjust your **HOME Page** even further, then you will need to use the **Visual Designer** (see further on in this document).

				8 0
Warehouse * E Eastern Warehouse Stock code * Bloo	Q 	Transaction details 0 Adjustments posted Stock information	0.00 Adjustments value	Ĵ
1100 WIN 2PNL 6068 XO WHT137 (71 1/2" X 79 1/2" Quantity * 0.000	~~~	Journal entries		~
Bin location E Serial numbers Edit	Q	ALC: NO.		-
Update original quantity received Notation		- Carlos Co		
Reference				
Ledger code 30-5620	Q			

But if the application only surfaces a few fields, then it is displayed in a popup window, as in the following example for the maintenance of **Buyers**:

ustomer Query	Stock Query		Refresh WebView					
	E Sales Order E Query	Bank Query	Average days to pay Company: 0	Y Product Classes	Ð			
	Buyers			×				
	Buyer AG		🛨 🕞	1 🔋 🌣 👘				
	Name *		Anthony Gardner					
	Email Address		AnthonyGardner@OUTDOORS.com		-			
70,000,000								
50,000,000 -								
40,000,000 - 30,000,000 -	_							
20,000,000 - 10,000,000 -								
o 🗕 🗕	FB	,	GB	NB				

Avanti applications typically consume the entire page:

To use another application, you can click on the **HOME** button, which will return you to the **HOME Page**.

Alternatively, you can remain in the Avanti application and click on the Menu icon to select another application.

SYSPRO Avanti × SYSPRO Avanti × 🗧 ightarrow 🕐 🔞 file///C/RND800/BASE/_SYSPRO_Fusion/Staging/TestHarnessReleaseBC.html?SecondInstance=true&OpenParameters=ythbl5jM74idHUqGUyg/Um... 🏠 🚦 SYSPRO'Avanti > Stock Codes e Phil Stock code B100 Q ŵ + B O Attributes ~ WIN 2PNL 6066 XO WHT137 (7: Description Stocking unit of measure Cost unit of measure MY USER DEF1 Parent 17'9" Long description B100-USER Q EA Q Product class Volume per stocking unit my second value Stock code on hold status Garden Furnita 0.000000 0.00000 No hold M - Made în Part category Mass per stocking unit Stock code status Alternate key 1 Q Warehouse to use N Normal Northern Warehouse1 Specific gravity Alternate key 2 O Temporary Northern Warehouse1 Warehouse to use 0,000,0 O Clear description Pricing I Units of measure v Tax codes O Options ~ O Tracking O Production ~ 🟋 Replenishment T Purchasing

In this case, the selected application will be displayed in a new TAB in the browser:

In this way you can have multiple applications running simultaneously and you can switch between them as required.

Note: Each additional application consumes more memory on the server, so you should consider limiting the number of instances.

LIMITING MULTIPLE INSTANCES IN AVANTI

When you are running a program in Avanti, you can access the hamburger menu to launch another program – this appears in a separate TAB in the browser as another instance of Avanti.

Each additional instance of Avanti consumes more memory on the application server and administrators may find it useful to limit the number of these instances that can be launched.

By default, you can launch up to two additional instances of Avanti from the hamburger menu. However, you can change this setting in the **Setup Options** program (i.e. **IMPCFG**) by modifying the **Maximum number of instances allowed** option:



Note: You can have a value of zero to indicate that no multiple instances are allowed.

If you reach the limit when trying to run another program from the hamburger menu, the following message will be displayed:



DEFINING PERSONAL SETTINGS IN AVANTI

In Avanti, individual operators can define various personal preferences.

On the HOME Page, click on the Settings icon and select Personal Settings:

Personal Settings		× 🌣
🛅 Company date		
Set company date	 For the company Temporary 	
New company date	17/09/2020	
Avanti settings		
Reset Window positions	Reset	
Reset Grid layouts	Reset	
Cffice 365 credentials		
Email option	Microsoft Office 365	•
User name *		
Password *	Enter password	
Tenant to use	System-wide tenant	•
Tenant ID		
Client ID		
Exchange web service	https://outlook.office365.com/ev	ws/exchan

From here, you can:

- Set the company date for everyone, or temporarily for the run of Avanti (if your operator code has the correct security access to do this).
- Reset saved settings for Grids and Window positions. Avanti automatically saves window positions and changes to grid layouts by operator. However, an operator can reset these to their default values using the links provided.
- Configure your own Office 365 credentials.

AUTOMATING AVANTI

You can make Avanti automatically run a program when you log in to the system.

In the browser URL, append a question mark followed by startup parameters using this syntax:

?StartupParameters=/prog=ARSPEN /link=1

This will run the **Customer Query** program (i.e. ARSPEN) passing it the Customer number 1.

Note: You will need to know the name of the Avanti program to use this capability.

If the user has not enabled the **Keep me signed in** option, the normal login page will appear first and after logging in then the program will be run.

PREDICTIVE SEARCH AND SEARCHING IN AVANTI

Predictive Search is optional in Windows client, whereas in Avanti it is automatically in use. Moreover, the method of 'browsing' in Avanti is quite different to that used in SYSPRO.

As you start typing into a 'key field' (such as **Stock code** or **Customer**) predictive search displays the items that match the filter criteria.

For example:



Note: You can use the **Search Configuration** program (i.e. ESPSRC) in the Windows client version to modify how these filter criteria behave.

Next to any key field in Avanti is the Search button:



Most searches will be displayed in a generic search window, explained below. Occasionally, a search is too complex for the generic search and in that case a special search window will be displayed.

The generic search window displays a **Filter** pane, and a **Search** pane:

er		<	Search										
			Search										25
Classificati	on	~	Results: 25 resul	lts (0.25	seconds)								
V classification			Customer	Ŧ	Customer name	Contact name	Ŧ	Telephone nu	Ŧ	Customer on hold	▼ Ac	tions	T
Contact		~	0000001		Bayside Bikes	Karen Saunders		206-555-4562			Ac	tions	<u>^</u>
*			0000002		Bikes & Blades - North	Susan Brown		416-555-8256			Ac	tions	
Credit		~	0000003		Bikes & Blades - South	Helen White		011-555-4262			Ac	tions	
			0000004		Bikes & Blades - East	Judy Davis		612-555-5454			Ac	tions	
Descriptive		~	0000005		Cash Sales						Ac	tions	
Vescriptive	Uescriptive		0000006		Country Gardens - East	Philip Smythe		612-555-7485			Ac	tions	
Cast_trans	action_date	~	0000007		Country Gardens - South	Justine Munroe		021-555-7485			Ac	tions	
			8000000		Garden and Sports	Cathrine Davids		604-555-1523			Ac	tions	
Location		^	0000009		Grand Adventures	Carol Donald					Ac	tions	
Branch	All		0000010		Maniac Sports - North	Jeremy Bright		847-555-8756			Ac	tions	
	/		0000011		Maniac Sports - South	Louise Bright		334-555-9855			Ac	tions	
	10		0000012		Maniac Sports - East	Diane First		205-555-1221			Ac	tions	
			0000013		Out of Africa	Thone Green		011-555-2123			۵.	tions	*
	20										1 - 20) of 25 i	tems
	30		-										

Clicking on a row in the grid will return the key value.

You can filter the data returned in two ways:

- Type the value you are searching for in the Search... box.
 The data is filtered across all columns in the database as you type, like a Google search.
 As an example, if you are looking for a customer whose telephone number contains 4562, simply type in 4562.
- 2. Some searches are displayed with special filters in the **Filter** pane. For example, the CUSTOMER search will automatically display a filter across all BRANCHES in the LOCATION category. Simply click the Branch or Branches you would like to include, and the data will be instantly refreshed. Note that the filters work across all customers. Here is another example, using the STOCK CODE search, so that you can select specific types of items such as TRACEABLE only.

ilter	÷	- Search					
Tracking	^	Search Results: 358 results:	ults (1.19 seconds)				358
Lot traceability	All	Stock code	T Description	▼ Product class	▼ Stocking unit o	▼ Manufacturing ▼	Lot traceabi
	O Inspection required O Traceable	A100	15 Speed Mountain Bike Boys	МВ	EA	Ν	Non traceabl
	 Non traceable All 	A101	15 Speed Mountain Bike Girls	МВ	EA	Ν	Non traceabl
Serial tracking method	O Batch serial	A102	15 Speed Mountain Bike Ladies	МВ	EA	Ν	Non traceabl
	O Manual serial O None	A103	15 Speed Mountain Bike Men	МВ	EA	Ν	Non traceabl
Stock code status	O All	A110	18 Speed Mountain Bike Boys	МВ	EA	FG	Non traceabl
Date of supercession		A111	18 Speed Mountain Bike Girls	МВ	EA	Ν	Non traceabl
17- Date stock code	02-2014 09-04-201	A112	18 Speed Mountain Bike Ladies	МВ	EA	Ν	Non traceabl
added		•)

Select the **i** button for additional actions:

• Clear all filters.

Switch off automatic searching.
 This allows you to select multiple search criteria and then click on the search button. With automatic searching on, as you change criteria the data is being immediately searched.

Filter	÷
Tracking	^
Lot traceability	 All Inspection required Traceable Non traceable
Serial tracking method	_
	7-02-2014 09-04-201

The FILTER pane and the COLUMNS displayed for each key type are pre-built into Avanti and cannot be currently changed. In a future release, you will be able to customize the FILTERS pane and adjust the column headers displayed.

Additional features available include:

- Click on a column header to sort the data.
- The grid displays by default the first 50 rows, but you can use the slider to show as many rows as you would like.

USING GEOLOCATION TO RESOLVE ADDRESSES

In Avanti, you can use the **Resolve Addresses** feature to ensure that the customer or shipping address is correct, and you can use the **Map Directions** feature to get directions to the address.

Wherever you see the **Geolocation** field in Avanti, you will see two buttons:

- Resolve address
- Map Directions

Building	Locality	Zip	
Street	State	Geolocation	
Oakdale Road		0.000000, 0.000000	ଚ ବୁଲ୍ଲ
City	Country	Latitude , Longitude	Resolve address
ity	Country	Latitude , Longitude	Resolve addr

Select the **Resolve address** button to let the system present a list of possible addresses that match the address group details:

Geolo	cation
Select the correct	address
Oakdale Rd, North	Carolina 28216, USA
Oakdale Rd NE, G	eorgia, USA
Oakdale Rd, Califo	ornia, USA
Oakdale Rd, South	arolina 29730, USA
Oakdale Rd, New	Jersey 07930, USA
Oakdale Rd, North	Fayette Township, PA 15071, USA
Oakdale Rd, Missi	ssippi 39047, USA
Oakdale Rd, Louis	iana, USA

Select the appropriate address and the system will automatically populate the address fields, including updating the Latitude and Longitude:

uilding	Locality	Zip
Street	State	Geolocation
Oakdale Road	California	37.696242 , -120.958107 🛛 🏫 📿
City	Country	Latitude , Longitude 37° 41' 46" N 20° 57' 20° W Map directions
	United States	

You can now select the **Map Directions** button and a new TAB in the browser will open indicating directions to the address using Google Maps:



Note: You can configure how GeoLocation works using the **Setup Options** program (i.e. IMPCFG): *System Setup > System-Wide Personalization*.

The Resolve addresses capability uses Google to provide the lookup; Google allows a limited amount of free usage of this service per day, and if you exceed this limit then you will have to consider applying for a Google API key.



USING WINDOWS IN AVANTI

Applications in Avanti are designed to display most information in a single page.

Where appropriate, the use of popup windows can surface additional information. For example, in the **Inventory Query** users can view **Movements** and **Warehouse history** lists.

Such lists are displayed by default in popup windows that can be resized and repositioned in the browser.

It should be noted that such behavior can easily be changed using the **Visual Designer** and make these lists appear in the single page.

tock code B100	Q							\$
	(HT137 (71 1/2" X 79 1/ Movements	2")	Lots expiring Stock code			II Period clo	×	
	Date	Туре	Warehouse	Trn type	Quantity	Transaction value	Unit cos	Î
M - Made-in	29/03/2011	Inv	E	Chg	0.00	0.00	3,038.24 🔺	
Part category	08/04/2013	Inv	E	Chg	0.00	0.00	2,992.71	
AB - Alan Brown	09/04/2013	Inv	E	Chg	0.00	0.00	3,042.91	
Planner	08/11/2013	Inv	E	Rec	100,000.00	304,291,160.00	3,042.91	10 11 12
	07/08/2014	Inv	E	Rec	1.00	3,042.91	3,042.91	· ·
Pricing	16/02/2015	Sale	E	Inv	1.00	3,042.91	3,042.91	
•	22/04/2015	Inv	E	Chg	100,000.00	-303,781,160.00	5.10	
\$4905.000 Selling price	20/10/2015	Inv	E	Rec	1.00	5.10	5.10	
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
Stock level	03/05/2017	Inv	E	Rec	12.00	61.20	5.10	
_	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
L01,317.000 EA On hand quantity	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	
Notes	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	10 11 12
	03/05/2017	Inv	E	Rec	1.00	5.10	5.10	▼ ¹⁰ 11 12
			4,905.00000 Selling price	EA Price	basis	view data		Ť

Here is the **Movements** list view displayed as a popup window:

And the same application, but with Movements and History List views displayed within the page:
SYSPRO'Avanti Home > Inventory Que	v						Q (Phil
	,						3	
ock code B100 Q								\$
	Movements	and the second		and the second		Tradition .	1947	
ots expiring Lots on hold								
	Date					Transactio	n value	
	29/03/2011	Inv	E	Chg	0.00	0.00		
	08/04/2013	Inv	E	Chg	0.00	0.00		18
000 Within 30 days Stock code	09/04/2013	Inv	E	Chg	0.00	0.00		
	08/11/2013	Inv	E	Rec	100,000.00	304,291,160	0.00	
ctive jobs	07/08/2014	Inv	E	Rec	1.00	3,042.91		
	16/02/2015	Sale	E	Inv	1.00	3,042.91		
	22/04/2015	Inv	E	Chg	100,000.00	-303,781,16	60.00	
	20/10/2015	Inv	E	Rec	1.00	5.10		
9	03/05/2017	Inv	E	Rec	1.00	5.10		
Stock code	03/05/2017	Inv	E	Rec	1.00	5.10		
Purchasing information	03/05/2017	Inv	E	Rec	12.00	61.20		
	03/05/2017	Inv	E	Rec	1.00	5.10		
00001 - 19 2 cycles Lead time Dock to	03/05/2017	Inv	E	Rec	1.00	5.10		
l imited in days stock days pplier	4						•	•
E Units of measure	History Warehouse :	MTD sold/issued	Prev 1 sold/i	ssued :	Prev 2 sold/issue		53 of 63 item Prev 3 sold	
	Combined	1,601.00	0.00		0.00		0.00	-
	E	1.00	0.00		0.00		0.00	
	FG	1,600.00	0.00		0.00		0.00	
	N	0.00	0.00		0.00		0.00	
	S	0.00	0.00		0.00		0.00	
	TEST	0.00	0.00		0.00		0.00	

Some windows are displayed as 'modal', meaning that the user cannot click behind the window and must complete the task within the current window. In other words, it forces the user to interact with the window before returning to the previous window.

You can move and resize these modal windows as required. The position and size of the window is automatically remembered for the user so that when the window is displayed again it is repositioned to the same location.

Technical note: Avanti modal window positions are saved on the application server in the text file ...\Settings\AVANTI\ModalWindowsAdditional_operator.txt.

USING CARDS IN AVANTI

Cards are pre-built discrete functional components with the following characteristics:

- Self-contained HTML5 page whose data is derived typically (but not exclusively) from a business object.
- May run as a separate entity in its own window or can be embedded in a view.
- May require a 'key value' (such as a Customer or Stock code key) to execute, whereas other cards require no such key – the latter are known as 'Insight cards' (an example might be 'Bank balances', or 'Sales order commitments').

While Avanti ships with a set of pre-built cards, it is relatively easy to construct new cards for any additional required functionality. To add a card to any view, you can use the **Visual Designer**.

SHOWING INSIGHT CARDS

To display an Insight card as a popup window, click on **Insight Cards** from the Settings icon while on the **HOME Page**, and select the required item:



The Card is displayed in a popup window:

SYSPRO Avanti × > C ① file:///C:/RND800/BASE/_SYSPRO_Fusion/Staging/TestHarnessReleaseBC.html#				\$
E SYSPRO'Avanti Home > Home Menu			Q	e Ph
Customer Query Stock Query		Refresh	1 WebViev	w 🌣
Order Intake Query Sales Query Inventory valuation	- Ces		NB	

The card can be positioned anywhere within the browser and can be minimized or maximized within the browser.

Avanti will remember any cards displayed like this and will display them again next time you login.

SHOWING 'KEY' CARDS, DOCKED AND UNDOCKED

Cards that are associated with key fields can be embedded in a view or can be displayed in popup windows or can be docked. Such cards are automatically refreshed whenever the key value in a toolbar or form field is changed.

To display a key card, you select from the SmartLink context menu (this is the same context menu that is available in the SYSPRO Windows client version).



Click on **Stock code card** and this will be initially displayed 'docked' on the right-hand side of your browser:

→ C C (1) UXTools/_SYSPRC	D_Fusion/Staging/TestHarnessReleaseBC.html	⊯ ⊕ ☆ ⊡ ⊖ :
😑 🎄 SYSPRO'Avanti 🏫 > Invente	ory Query Stock code card	≜ ×
Stock code B100 Q	B100 ▼ Bicycle Special bicyle A B C	<u>5</u> 2
B100 ▼ Bicycle Special bicyle A B C		FGC - Finished Goods Cycles
	M - Made-in Part category	 Product class
M - Made-in Part category		▼ Product class JD - Jenny Davis Buyer
	Part category AB - Alan Brown	JD - Jenny Davis 🔻

The card will remain docked, even if you navigate back to the **HOME Page** – until you close the card (click \mathbf{X}) or you undock the card (click \mathbf{A}).

An undocked card then becomes a normal floating card which can be minimized, maximized, or closed:

B100 🔻 Bicycle Special bicyle A B C	<u>0</u> 70
M - Made-in	FGC - Finished Goods Cycles
Part category	Product class
AB - Alan Brown 💌	JD - Jenny Davis 🔻
Planner	Buyer

USING GRIDS IN AVANTI

A grid in Avanti has some common characteristics:

- Built-in functions (output as PDF document, output to Excel, and Filtering) are displayed in the grid toolbar on the right-hand side.
- If the grid is editable and supports the notion of automatically adding rows, then a **Paste** button is available on the grid toolbar:



When you select this button, the contents of the clipboard are pasted into the grid.

Note: The clipboard should contain rows, each one separated by CR/LF characters and the cells in the rows must be separated by a TAB character – typically, you would copy rows from Excel into the clipboard.

The rows must be formatted from left to right with cell values to duplicate the column headers shown in the Avanti grid.

Date values are automatically converted to CCYYMMDD values.

• The ... button displays more capabilities, such as conditional formatting, adding custom columns, column totalling and editing a script:



- Buttons that are specific to the application are displayed on the left-hand side.
- The height of the grid can be adjusted, either by using the Visual Designer to fix the size to be small, medium or large; or by clicking on the or + buttons displayed in the grid this dynamically adjusts the height:

		×
PDF 👤	Filter	
telephone	Work address	
	P O Box 777 Great Outdoors	
	phil ""abc""	-
	Showing 132 item(s) *
		+

• If there are some actions available for an editable grid, then these are typically displayed as buttons to the left of each row. In the example below, selecting the **Edit** icon displays a context menu:

\rightarrow C \triangle (i) File file	e:///C:/RND800/BA	SE/_SYSPRO_F	usion/Staging/TestH	larnessReleaseBC.html#	* 0	:
SYSPRO'Avanti 🏫	> Back Order	Release		۹ (• •	
Station and			100000	and the second second		
=, ■				💷 👱 Filter		
Selected	Sales order	Line :	Stock code	Backorder quantity	Uom	
Change	<u>900814</u>	1	<u>BSO100</u>	350.000	EA	
			BSO100		EA	

The following example shows a **Delete** icon that, when selected, will remove the row:

	Ledger code	:	Description	:	Transaction date	- 1	Reference	:	Deb
Ŵ		Q			04/12/2018				

The grid list column sequence in Avanti is initially provided from the equivalent list view from within the SYSPRO program. Thereafter, any changes to the grid when running in Avanti (such as moving columns around, removing columns, sorting, or grouping) are automatically saved on the application server in ...\Base\Settings\AVANTI\ as:

List_operator_gridname_AVANTI.XML

If you are designing by Role, then grid layouts are saved in the **Role_xxx** folder as:

List_gridname_AVANTI.XML

Note: Changes to grid layouts are not saved if you are logged into Avanti using a role.

MODIFYING THE AVANTI GRID

You can modify the contents of any Avanti grid by using the following capabilities:

Conditional formatting

This allows you to apply formatting against any column in the grid based on simple rules:

onditi	ional Formatting: B	anks at a Glance	÷	- - >
				ə 🔁 🌣
Ava	ilable rules		Rule entry	
	🖭 生 Filter	•••	Rule name	Rule
	Available Rules	ColumnName	Rule applies to column	Current month
Û	Rule	Current month	Format cells where cell value	is less than
			Value1	10000
		Value2		
			Case sensitive	
			Cell bold	
+	Add new rule		Cell text color	T
			Cell background color	•
			Row text color	•
			Row background color	•
			Hide row	
			Tooltip	Bank balance problem

Custom columns

You can add columns to the grid based either on custom form fields or from master table data. The custom columns that may be added are determined by the 'keys' that are available in the grid columns:

Custom Columns: Ba	anks at a Glance	– 🗆 ×
	e	•
Column selector		
Column type	 Custom form column Blank column Master table column Al column 	
Custom form type	bank	-
Custom form field	Bank location	-
Field name	BAN002	_
Column properties		- 1
Description	Bank location	_
Туре	Alpha	-
-		_

Once you have added custom columns to a grid, you can remove them at any time:



Column sum, Column average and Row count

You can select any numeric column to be either 'summed' or 'averaged', however, you cannot have both for the same column. If you select to display a row count, this will be displayed in the grid footer for the first column in the grid. Once you have added a sum, average or row count, you can then remove it by clicking on the same item:



• Editing a macro for a grid

You can create a script to execute against the grid for various events, such as when the grid is populated with content, or when a grid's contents are about to be submitted to the database.

railable Events OnPopulate - A Syntax Check Procedures		× 🏚
 This script contains functions for list view events. OnSubmit and OnDblClick events can be cancelled using the syntax: functionName = false 	Variables	^
3 'You must not modify the name of the functions. 4 Option Explicit	🖭 🛓 Filter	
5 6 - Function MovementsForStockCode_OnPopulate()	Variable † Event	s
7	► CustomForm	
8 End Function	 Distribution 	
	MovementOptions	
	MovementsForStockCode …	
	MovementsForStockCode	
	► Notes	
	Production	-
	VBScript modules	~
	Notepad	~
ig:\vbscripts\INVPENLV		

Note: This capability is controlled by security access.
 Additionally, you cannot edit a script for a customized pane grid here – instead, you should use the Customize Application facility.

You should refer to the **Power Tailoring** guide for a full explanation on the scripting capabilities.

USING XAML THEMES IN GRIDS

Advanced conditional formatting can be applied to any grid in SYSPRO, and generally, that formatting also applies to the equivalent grid in Avanti.

You can also apply a XAML theme to any column in a SYSPRO grid. However, there is no equivalent to XAML in a Web Browser. Instead, in Avanti, a grid will make use of an HTML Template.

Consider the formatting rule applied as follows to the **Contacts** browse:

Advanced Conditional Formatting		— D	×
🖁 🖶 Apply and Exit 🛛 Apply 🏻 🎦 Add Rule	<u> </u>		° -
Rules	Rule Entry		
Available Rules	Rule name	Rule	
Rule	Condition		
	Rule applies to column	Work address	
	Format cells where cell value	contains	
	Value1	north	
	Value2		
	Case sensitive		
	 Formatting 		
	Cell text color	255; 255; 255	
	Cell background color	255; 255; 255	
	Cell bold		
	Row text color	255; 255; 255	
	Row background color	255; 255; 255	
	XAML Theme	MultipleFields	
	Hide row		
	Apply to group totals	Yes	
	Tooltip		

By applying a XAML theme of '**MultipleFields**' to the Work Address column, we can change the style of the cell as displayed as follows:

🛃 Contacts					- 🗆	×
🕨 Select 📋 💼 🗙 🌉 Sta	tions art at Contact 🔹	→ I4 4	► M			¢,
Contacts	€	La ta stata	and an all			^
Contact Alan Brown	Preferred name	Job title	Work email alanbrown@Outdoors.co	Work telephone	Work address P O Box 777 Great Outdoors	
Alan Brown Albert Rabisi			albertr@Outdoors.com		phil ""abc"" P O Box 777 Great Outdoors	
Andrew Kenilworth			andrewk@Outdoors.com		P O Box 777 Great Outdoors	
Anne Baxter			abaxter@masterengineer	206-555-6547	P O BOX 7775 NORTHVIEW SEATTL WA USA 98111	E
Anthony Gardner			anthonygardner@Outdo		P O Box 777 Great Outdoors	
	Items:100					

In Avanti, this formatting rule will use the template **Form_MultipleFields.html** (located in the ...**\Samples** folder) to achieve an equivalent result:

OWSC	on Contacts	,						>
					POF	Ŧ	Filter	
rag a co	olumn header a	and drop it here to group	by that column					
	Cont	Preferred name	Job ti	Work email	Work telephone		Work address	
₹	Alan Brown			alanbrown@Outdo ors.com			P O Box 777 Great Outdoors	
7	Alan Brown						phil ""abc""	
7	Albert Rabisi			albertr@Outdoors.c om			P O Box 777 Great Outdoors	
2	Andrew Kenilworth			andrewk@Outdoors .com			P O Box 777 Great Outdoors	
2	Anne Baxter			abaxter@masteren gineers.com	206-555-6547		P O BOX 7775 NORTHVIEW SEATTLE WA USA 98111	
₹	Anthony Gardner			anthonygardner@0 utdoors.com			P O Box 777 Great Outdoors	
				ashr@Outdoors.co			P O Box 777 Great	•

Thus, any XAML theme can be substituted with an equivalent HTML template when running in Avanti.

Here is another example using the Image, AddressPlain, ProgressBlue and LineChart12 templates:

ication					8 X
					8
mage	Address	Progress	Graph		
1	9 Acme Drive Morecambe England			Last 12 Months Sales	
		17 UA			
	94 Tweedale Road Hyde Park Johannesburg			Last 12 Months Sales	
tottle Lacorsiette		63%			
	mage	9 Acme Drive Morecambe England 94 Tweedale Road Hyde Park Johannesburg	9 Acme Drive Morecambe England 94 Tweedale Road Hyde Park Johannesburg 655	9 Acme Drive Ingland 94 Tweedale Road Hyde Park Johannesburg 655	9 Acme Drive England Last 12 Months Sales 90 Acme Drive England 9 Acme Drive England 90 Acme Drive England 9 Acme Drive England 90 Acme Drive England 9 Acme Drive England 94 Tweedale Road Hyde Park Johannesburg 94 Tweedale Road Hyde Park Johannesburg

And in Avanti:



Note: The above examples were designed using the **Application Designer** program.

USING BUSINESS INSIGHTS AND TILES IN AVANTI

Business insights are discrete views of KPI data and are displayed within Tiles. These tiles can be added to any view using the **Visual Designer**. Additionally, a tile can represent a program that can be launched.

If we look at the view displayed below, which is the **HOME Page** for Avanti, there are 3 Program Tiles, and two Business Insight tiles:

C () file:///C:/RND800/BASE/_SYSPP	e Menu	Relased Christian	★ : Q () Phil
ustomer Query Stock Query			Refresh WebView ጰ
Query Query	Bank Query 2 Product Classes 2	Bank Balances	, NB
Company:0 65 Days			

Selecting **Order Intake Query**, for example, will launch that application.

Selecting **Average days to pay** (a Business Insight tile) will display the detail behind that KPI:

SYSPRO'Avanti Home >	Home Me	nu				Q	e Phil
stomer Query Stock Query						Refresh WebView	\$
	B B	verage days to pay				- ¤ ×	
Query Query		Customer :	Customer Name	Salesperson	Customer Branch	: Age of z	
		00001	Bikes and Blades - West	201	20	2,603.00 *	
		00002	Bikes and Blades - North	100	10	2,852.00	
		00006	Country Gardens - East	300	30	1,872.00	
Average days to pay	P	00007	Country Gardens - South	201	20	1,655.00	-
company: 0		80000	Garden and Sports	102	10	923.00	
relage days to pay		00009	Grand Adventures	101	10	80.00	-
		00010	Maniac Sports - North	100	10	744.00	
	5	00011	Maniac Sports - South	201	20	714.00	
	ays	00012	Maniac Sports - East	300	30	617.00	
		00016	The OUTDOORS Company	300	30	40.00	
						*	
		4				•	
					1-1	0 of 10 items	

DESIGNING COMPLETE APPLICATIONS FOR AVANTI

You can use the **Application Designer** program in SYSPRO to develop a complete application that will also run in Avanti.

In SYSPRO, launch the program **IMPIDE** and click the **NEW** button to start designing an application.

C Application Designer	– o x
File	•
🕼 Save 🔒 🛅 🖾 Open 🎬 Close 🛛 Edit Application Details 🛛 Edit Script 🖉 Data Sources 🔹 🕨 Run 👻	Project View* Design Mode
Toolbox Create New Application 4 My Application	Application Details 4
Project Explor	
Toolbox Application Explorer	▲ Details
▲ Controls	Application name
	Application title
Chart	Docking layout ID
*1、Flowgraph E書 Form	Toolbar ID TB
🔊 Image viewer	Version 0
Estview	Standard SYSPRO app
📝 Notepad	Type of application • Custom application
Document Viewer	Initial window size Medium Preview
E Syntax Text Editor	In development
Tile	Encrypt application on
Treeview	Check changes for save
📰 User Control	On initial load, set focu
E XAML control	 Status bar
Drop Files control	Show status bar
	Number of sections 1
	Section 1 text
	Section 2 text
	▲ Desian
	Application name
	This is the name of the application. It must be 6-characters long and contain only alpha or numeric characters. Once you have saved an application, the name cannot be changed.

Once an application has been designed and working, you can then design the Web View.

Application Designer: OLEDB Application	(OLEDB1)						\times
File							
🖓 Save 🔒 🛅 📾 Open 🎦 Close 🛛 Edi	it Application Details Edit Script Data Sources*	▶ Run ▼ Project View▼ Design	Mode				å.
Toolbox 4	OLEDB Application			Application Details			Ą.
Project Explorer Data Source Explorer	Stock code - Q Validate	Product Class	-				
Toolbox Application Explorer	Inventory Information Stock Information		Ψ×	 Details Application name 	OLEDB1		
	Stock code		Q 🗔	Application title	OLEDB Ap	plication	n
∎ Chart ⁺L, Flowgraph	Date last sale		31	Docking layout ID	OLEDB1LZ		
E Form	Stock code description		1	Toolbar ID	OLEDB1TB	3	
Image viewer	Product class	SPEC	Q	Version	114		
 Listview Notepad 	Product class description Decimals	0		Type of application	 Standar Custom 		
Document Viewer	Buyer		Q	Initial window size	Landscape		mew
Syntax Text Editor	Planner		Q	In development	V		
E Tile	- Diappor Information			Encrypt application			
Treeview	Warehouses 4		Ψ×	Check changes for			
User Control WebBrowser Control	Wa Qty Date Qty Qty Mi			On initial load, set f		tock co	c -
	There are no items to show	Include in requirem		 Status bar 			
Drop Files control		Negative stock allc	1	Show status bar			
— .		Next purchase order number		Number of section	1		
				Section 1 text			
				Application title			
				The title will appear in t	he Window	heading	g.
						_	_

Please read the **Application Designer Overview Guide** for a full explanation on how to use the **Application Designer**.

UNDERSTANDING WORKSPACES

A workspace is a way of grouping tasks or processes in a meaningful way for an individual. Another way of looking at a Workspace is that it is a web view designed to be surfaced when you are in the **HOME Menu**.

Note: Workspaces are only available when you are in the **HOME Menu** in Avanti.

If you are in a Role, then typically the Workspace is designed by the Administrator (<u>Designing</u> <u>Workspaces by Role in SYSPRO</u>).

If you are not in a role, then you can design your own Workspaces (Designing Workspaces in Avanti).

Typically, Workspaces are designed either at the operator level or by role. However, it is possible to design a **HOME** layout that is universally available across the organization regardless of whether you are in a role or not.

DESIGNING WORKSPACES IN AVANTI

Workspaces for a non-role user are designed from within Avanti and you can have an unlimited number of workspaces.

To be able to design or delete or add a workspace, the security option against the operator **Avanti – Allow to design Workspaces** must be switched on. This option is switched on by default and must be explicitly switched off to prevent an operator from being able to design or add a workspace.

Click on the **Settings** icon when in the **HOME Menu** and select **Workspaces**. A list of available workspaces is displayed.

Note: You will always have a **Default layout** workspace, and this will be selected by default when you log into Avanti:

+ New Workspace	Vorkspaces	•
New HOME Layout	Design Workspace	
Default layout ACDC	Set as Favorite Design Web Views by Role	
Engineer-to-Order	Avanti Event Viewer Design Flowgraph	
Income Statement	Design Card	
Landed-Cost-Tracking	Cards	

To add a new workspace, select the **New Workspace** option.

Add Workspace		×
Enter workspace na	me:	
my new workspace		
The name must no following character	t contain any of the rs: \/:*?"<>	
ОК	Cancel	

The workspace will be saved as a filename as:

...\Settings\UX_operator_IMPMENLZworkspaceName.JSON.

Note: Because this is a filename, you cannot include invalid characters such as \ or /.

Click on **OK** and the **Visual Designer** will load, indicating the workspace you are editing in the status bar.

Next, add the elements you wish to display in your workspace.

In the following example, two TILES have been added:

Home Menu - SYSPRO Avanti	× +			-		×
\leftrightarrow \rightarrow \mathcal{C} \bigtriangleup \bigcirc File C	/RND800/BASE/_SYSP	RO_Fusion/Staging/Te	stHarnessRele 🍞	G	d	:
SYSPRO'Avanti > Home Menu				1	• •	^
·		×	🔒 🖬 🗠		?	
Add toolbar item		la Y defense L	+ Add toolbar item	G	*	
	🕒 Add la	yout section				
		}				10.00
	Average days to pay for company KPI - Financials	WIP at a glance total hours booked KPI - Operations				
Visual Designer Editing Workspace: my	new workspace					ļ

After saving the Workspace, it will be refreshed in the **HOME Menu**:

🚍 🔬 SYSPRO'Avanti 🕋 > Home Menu			A Q 0
		+ Add Workspace	C + n
Average days to pay Company: EDU1	WIP at a glanc Total hours	Favorites Engineer to Order Landed Cost Tracking	Design Workspace Delete Workspace Design Flowgraph
41 Days	6.686 Period	Make to Stock	Cards •

To change the Workspace, select the **Design Workspace** option. To delete the Workspace, select the **Delete Workspace** option.

Note: You cannot delete your **Default layout** workspace as this is your primary view in the **HOME Menu**.

You can set any workspace as your 'Favorite' – simply select the workspace and then select the **Set as Favorite** option.

DESIGNING A HOME LAYOUT

Optionally, you can design a HOME layout.

This layout is universally available no matter if you are logged in as a role or not. Additionally, once you have designed a HOME layout then this is always the first layout displayed.

This is useful if the business requires a standard layout to be displayed by default to everyone in the organization. A user can then still select any available workspace.

To design a HOME layout, select **Workspaces** and then click **New HOME Layout**.

Once a HOME layout has been created it can be subsequently designed or deleted.

To quickly access the HOME layout when in the **HOME Menu**, just click the **HOME** button.

Note: The HOME layout is saved as ...\Settings\UX_APP_HOME.JSON.

SWITCHING WORKSPACES

You can switch Workspaces in one of the following manners:

- Select the **Settings** icon and select from the Workspaces displayed.
- Select the **Favorites** icon this will load the workspace designated as your 'Favorite'.
- Drag a Workspace item from the Hamburger menu onto the Tile section (if you have a Tile section in your Workspace):



Selecting the workspace tile will switch to the nominated workspace:



You can also switch to a different Workspace using the Flowgraph:

- 1. Call up the **Flowgraph Designer**.
- 2. Add the design element.
- 3. Select the **EDIT** button.
- 4. Choose the appropriate Workspace from the **Workspaces** list:

SYSPRO'Avanti Home >	Home Menu			🌲 🔍 😁 Phil
				C ★ 🌣
Simple Query Flowgraph •		default 🗠 🖉		
Data				Diagram options
Average days to	Sales Proces	it		Layout: Tree Down 🔻
Delay				Shape options 🔺
Display		tle 100se title		Colour:
Document	Su	ibtitle		Connection options
Manual input		ibtitle	_	Start Cap:
Manual		ogram ielect a program		End Cap: Arrow End 🔻
Veration		cicce a program	Q	Align 🔺
Or		> Flowgraphs	A	$\land \lor \leftarrow \rightarrow$
Preparation		 Business Insights Workspaces 	- 14 Million (1997)	
Process		Engineer-to-Order	e l	, Arrange 🔺
Octagon		Landed-Cost-Tracking Make-to-Stock		
		my-new-Workspace		
		> Accounts Payable	•	

DESIGNING WEB VIEWS AND WORKSPACES FOR A ROLE IN AVANTI

You can design a web view or workspace for any role when running in Avanti, if the operator option **Role Layout Designer** is enabled:

<u>F</u> ile <u>E</u> dit <u>C</u> ontact P <u>a</u> se ™New X ो । <u>O</u> per	sword ator: ADMIN	•	▼ Prev ▶ Next ▶ Q Notepad Printers	
Con <u>t</u> act			· · · ·	¢ -
Operator Details 4			Options	ι×
Personal		^	Defaults Options × Timeout Security E.net	
Operator	ADMIN		Analytics administrator	^
Operator name	SYSPRO Administrato	r	Analytics viewer	
Network user name	ADMIN		Role layout designer	
Operator group ^{r Group}	ADMIN	Q	Contact management user only	1
Subgroup	Define list		Point of sale user only	
Location		~	Numeric formatting	~

After logging into Avanti, follow these steps to design web views and workspaces for a role:

<u>Step 1:</u>

Select the Role to be designed from the Settings icon in the **HOME menu**. You can also select to design at the **System-Wide** level.

System-wide	🛉 🌲 😫 Phil
Account Manager	~ . +
ARROW PURCHASING	Workspaces Design Workspace
Assets Buyer	Design Web Views by Role
Assets Manager	Avanti Event Viewer
Assistant Controller	Design Flowgraph
A_Bc dE_Role1(Sys Admin)	Design Card
Bookkeeper	Cards

Note: Only roles whose user interface has been 'configured by role' will be displayed in the list. The **Role Management** program (i.e. IMPMOL) can be used to set this property against each role.

A message indicates that you are now in design mode:



<u>Step 2:</u>

If you click again on the Settings icon in the **HOME menu**, the following functionality is available:

- Stop design mode (at any time)
- Add a new Workspace for the Role
- Modify an existing Workspace

- Delete a Workspace
- Set a specific Workspace to be the 'Favorite'

If you set a workspace for a role as 'Favorite' then that workspace will be initially displayed when an operator for that role logs into Avanti.

+ New Workspace	Design Workspace for Role: 100	•
Default layout	Delete Workspace for Role: 100	•
Customer Validation	Set Favorite Workspace for Role: 100	•
Interactive Map	Stop Designing by Role	

<u>Step 3:</u>

If you are in an Avanti program and you click on the Settings icon, then you can either design a web view or delete an existing one. Some programs have multiple web view layouts, and they will be displayed in the context menu:

	🌲 🙁 Phil
Primary Layout	Design Web View for Role: 100
History Selection	Delete Web View for Role: 100
Movements Selection	
Values Selection	

Note: When you start design mode for a role, a file is written to the SYSPRO 'Base' folder. The file is named **SYSPROAvantiDesignByRole_xxx.txt**. This file is deleted when you stop design mode, or you simply exit out of the browser.

If another operator attempts to start design mode for the same role, then this message will be displayed:



USING WORKSPACES BY ROLE IN AVANTI

Workspaces by role are available when you are in the **HOME Menu**, and are displayed beneath the **Settings** icon (sorted by description):



A workspace may contain anything that can be designed in the **Visual Designer**:

- Business insights
- Program Tiles
- Charts
- Flowgraphs
- Cards

- Grids
- Forms
- Any Customized Panes associated with the role itself

You can switch between workspaces at any time when you are at the **HOME Menu** in Avanti. The name of your current workspace will be displayed in the status bar of Avanti. Clicking on the Favorite icon will show the workspace designated as the Favorite.

DESIGNING WORKSPACES BY ROLE IN SYSPRO

Workspaces by role can be designed from within SYSPRO or from within Avanti. And you can have an unlimited number of workspaces for each role.

Within SYSPRO, from the **Administration** tab of the Ribbon Bar, select **Design Workspaces** (this button is only available if the **Role layout design** option against the operator is enabled). This displays all the defined workspaces across all roles:

🖺 New 🚉 Change 🗙 Dele	te	÷
Role	Description	
▲ 100 - Account Manager		
	Credit Checking	
	Customer Validation	
	Management Processes	
	Pay Process	
	Prospects	
	Sales Order Processing	
	Special Inventory Queries	
	To-do List	

Click on **New** to create a new workspace.

Select the role for which you wish to define a workspace, and enter a description:

Workspace Maint	tenance	×
Select role:	100 - Account Manager 🗸 🗸 🗸	
Description:	Special KPI	
Select template:	DebtorController V Preview	
Start Designing	Workspace Cancel	

Optionally, you can select a pre-defined template to use as the basis for your workspace.

Select Start Designing Workspace and the Visual Designer is launched:

Visual Designer: Workspace: UX_WSP_Special KPIs.JSO	N (Role: 100)		—		×
ose 🕞 Save <u>N</u> ew <u>D</u> elete View Design <u>T</u> emplate	<u>E</u> dit Macro				° -
🚥 🖽 🔒		le:		?	^
土 Add toolbar item		土 Add toolbar item	G	*	
	🛃 Add layout sectio	n			
	Đ				
	Customers on hold for company Metric - Customer Management	Receivables days outstanding for customer KPI - Customer Management			
					~

In this example, three Business Insights have been added to this workspace.

Select **Save** to save the workspace.

From within Avanti, selecting this workspace displays the view below.

The Role and Workspace names are displayed in the status bar.

SYSPRO'Avanti Home	e 🗲 Home Menu		Q	SYSPRO Ad	ministrato
				C 1	* \$
	Invoice Ageing	Customers on hold Company: 0 Custstanding Customer: 00001			
	8,000,000 - 4,000,000 -	Customer 00001			
	6	The OUTDOORS Company	78 ays		
	77			Transfer Property	N. 84

TECHNICAL INFORMATION REGARDING WORKSPACES

Workspaces by Role are held as JSON files.

Role Workspaces
 SYSPRO template workspaces for roles are located in the following folder:

 ...\Base\Samples

 Prefix:

UX_WSP An example of this: UX WSP InventoryController.JSON

Administrator designed Workspaces

Workspaces designed by an Administrator are located in the following folder: ...\Settings\Role_xxx

Prefix: UX_WSP and the description. An example of this: UX WSP Special KPIS.JSON.

Non-role user Workspaces

Workspaces for non-role users are held as JSON files in the following folder:

...\Settings

An example of this:

...\Settings\UX_ADMIN_IMPMENLZMake to Orderd.JSON

TASK AUTOMATION IN AVANTI

You can create a series of tasks (i.e. programs) in Avanti that can be executed sequentially.

Perhaps you wish to create a month-end procedure that must run a series of programs one after the other. This can be automated so that when you start to run the task group, all programs are automatically run one after the other until the group is complete.

A full description of how tasks work can be found in SYSPRO's Online Help (<u>SYSPRO Help - Tasks</u>). Therefore, this section explains at a high-level how to create and run tasks in Avanti:

- In the HOME Page, select the Settings icon and select Workspaces > Task Automation. A special workspace will be presented.
- 2. Click on the **NEW TASK GROUP** option to create a new group.
- **Note:** In SYSPRO, a task group can be automated directly from the Windows scheduler. This is currently not possible to achieve in Avanti.

In SYSPRO, task groups are defined and run from the **TASKS** window:

	end procedure				
Task Details					μ×
11 🛋 🗙 🖸	💵 🕨 🖶 🏅	search text		e e e e e e e e e e e e e e e e e e e	
Completed Tas	sk	Start date	Program	Comment	
	Period End	17/09/2020	ARSP01		
🗌 Pau	use	17/09/2020		Pause between task	
AR AR	Statement Print	28/09/2020	ARSP40	Print monthly AR staten	nents

In Avanti, tasks are defined by selecting the **Task Automation** workspace from the **Settings** icon in the **HOME Page**.

 New Workspace 	Workspaces •
New HOME Layout	Design Workspace
Task Automation	Delete Web View
Default layout	Set as Favorite
,	Design Web Views by Role
Avanti Business Insights without pane	Customize Application
Avanti Business Insights	System Information

Here you will see the same list of Tasks as defined in SYSPRO:

✓ Task groups ····	*	=+	i <u>t</u> <u>t</u>	•	PDF	🛓 Filter		
Month end procedure			Completed	Task	Start date	Program	Comment	
		ľ		AR Period End	17/09/2020	ARSP01		-
		1		Pause	17/09/2020		Pause between task	
		1		AR Statement Print	28/09/2020	ARSP40	Print monthly AR statements	

In Task Groups, click the ellipses (i.e. '...') button for various Task Group functions:



Creating or editing a task group allows you to describe how the group should behave:

Task Group			
			🖬 🕀 🗙 🌣
Description *		Month end procedure	
Automatically run tasks sequentially			
Pause at tasks marked as 'comment'	✓		
Check previous task completed			
Mark tasks as complete	~		
Processing options			
Suppress error messages		Before processing any task	Do not kill any processes
Email log file to operator		group	 Kill processes for all companies
Stop processing tasks if error occurs			O Kill processes for the current company
Automatically do a company lockout			
			Showing 3 iter

You can then add a task item to the group.

A task item can run a program or report and can be scheduled to run on a certain day and optionally recur daily, weekly, or monthly. Programs can also be automated so that they apply specific values to form fields.

	÷	Э×	\$
Associated with group	Month end procedure		
Task	AR Period End		
Start date	17/09/2020	—	
Comment			
🚼 Program details			^
	Select program		
Program	ARSP01		
Description	AR Period End		
Program type	SYSPRO program		
Group name	Form Design <u>Apply automation parameters</u> <u>Automation design</u>		
Task order	 Add this task after last task for this date Insert after selected task Insert before selected task 		
Select a task			
Set reminder if due			
Insert into Microsoft Outlook			
A Recurring			^
Task occurs Once only Daily Weekly Monthly			
Task start 17/09/2020			

In the **Task Details** pane, you can add a new task, delete a task, or move a task up/down the list.

≡+	∎ ± ±	_Ռո_		[PDF]	Ŧ	Filter	
	Completed Run	Task Jask	Start date	Program		Comment	
1		AR Period End	17/09/2020	ARSP01			
1		Pause	17/09/2020			Pause between task	
1		AR Statement Print	28/09/2020	ARSP40		Print monthly AR statements	

You can also start to run the tasks by clicking on the **Run Task** button:

When a Task Group has finished, the tasks that have executed will be displayed in the **Task Messages** grid:

≡+	i <u>t</u> <u>t</u>	•		104	±	Filter		
	Completed	Task	Start date	Program		Commer	nt	
1		AR Period End	17/09/2020	ARSP01				^
1		Pause	17/09/2020			Pause be	etween task	
I		AR Statement Print	t 28/09/2020	ARSP40		Print mon	thly AR statement	s
							Showing 3 ite	em(s) 🔻
Task	messages					Filtor		^
Task	messages							^
Task	messages Task group	Task	Completed	Task message		Filter ogram	Program dese	
Task	-	Task AR Statement Print	Completed	_	Pro		Program deso Statement Prin	criptic
	Task group Month end			_	Pro	ogram		 criptic
	Task group Month end			_	Pro	ogram		criptic

If any of the task items were schedule to recur on another day, then the following message will popup:



SHOWING THE TO-DO LIST IN AVANTI

In SYSPRO, there is a **To-Do-list** that can be added to the user's main menu. However, this view isn't displayed by default in SYSPRO. To display it, select the **Click to show To-Do List** function:

Home Setu	up Import Query Administration			•	°0
Calendar	pad – Reminder		Personalization *	Hotfix Hotfixes	
Navigation Pane 4 × 📽 🖣 🖽 🛅 Recent Programs	Favorites Clear V Favorites	₽ × To-Do L	ist show To-Do List		ά×
Program description	SDKID1				
Form Design Application J Application K					

After you have selected this function, the **To-Do list** is displayed:



To enable this in Avanti, select the Gear icon in the **HOME Page**, followed by the **Enable To-Do List** option:



To display the **To-Do List** in a Web View, launch the **Visual Designer** and add the Grid labelled **To-Do List Details** to a layout section.

PRINTING DOCUMENTS IN AVANTI

PREREQUISITES

 To print a document in Avanti requires the **Reporting Configuration** option to be enabled as Server-side reporting. This is implemented in the System Setup, Reporting section of the Setup Options program (IMPCFG):

→ C (G) 💹 🖈 🎯 E
🗮 💰 SYSPRO'Avanti Home > Setup Options	🌲 😑 Phil Duff
EDU1 - The OUTDOO	Functions - Define - 🛈 Information 🚼 🔁 🌼
Categories	Options
Categories ···· Configuration	Reporting configuration Server-side reporting using SQL O Client-side reporting using SQL
 Preferences Financial Periods 	O Client-side reporting using XML Reporting service
▶ Tax	
History User-defined Fields Keys	reportingserviceconnectivity <u>Test connectivity</u> User name
Company	User name
General Ledger Integration System Setup	User password
General	Enter password
Login	Automatically purge queue
Reporting	Days to keep queue item 0

• You may have to install the SRS server-side reporting system. Without this, you cannot print documents or any SRS reports from within Avanti.

PRINTING DOCUMENTS

Clicking on a **PRINT** button to produce an online document will cause the document to be produced as a PDF document and will be downloaded to the browser. As an example, the following screenshot shows the **END ORDER** screen for **Order Entry**:



After clicking on the **PRINT** button, the document is created and displayed as a PDF in the browser download area:



Select the PDF button in the browser to display the PDF document. This allows you to print the document:

				0000000000988.pdf		☆	
very note 00000	0000000988.pdf		1 / 1		¢ ±	٩	
	doors Company	/		P O E Great	DUTDOORS Company lox 777 Outdoors 1978/035534/04	Print	
					Delivery Note 000988		
Shipping address	: Beyeide Bikee 3 Beech Road Beyeide North Seattle WA USA 96101-			Customer	: 0000001 Beyelde Bikee P C Bax 8 Beyelde North Seettle WA USA 98111-		
Shipping Instructions	: Road			Telephone Fax	: 206-555-4562 : 206-555-4587		
Sales order	Invoice date	Order date	Ship date	Salesperson	Customer purchase order no		
000988		11/09/18	11/09/18	Tony Dean	p/o #1	+	
Delivery terms : Stock code	Descrip	tion	Warehouse	Ship quar	näty Unit price Gross ar	NO —	

SWITCHING ROLES IN AVANTI

If you are logged into Avanti using a role, and your operator is associated with more than one role, then you may switch to any of the other roles while you are in the main Avanti menu.

As an example, the screen shot below shows that Operator ADMIN is linked to three roles:

Operator Maintenance		—	×
<u>F</u> ile <u>E</u> dit <u>C</u> ontact P <u>a</u> ss	word		
🖺 Ne <u>w</u> 🗙 🖻 🔒 Opera	tor: ADMIN	▼ Q Notepad Printers	
Con <u>t</u> act			÷ •
Operator Details			џ
Personal			^
Operator		ADMIN	
Operator name		SYSPRO Administrator	
Network user name		ADMIN	
Group Adı	ministrator Group	ADMIN	Q,
Subgroup		Assign	
Location			~
Roles			Ψ×
Access Roles ×			
🐴 Add Ro <u>l</u> es 🛛 📘 Or <u>g</u> anograr	n		å .
Role	Primary role		^
Account Manager			
ARROW PURCHASING			
Assets Manager			
Assets Buyer			

In Avanti, you click on the **SETTINGS** icon in the **HOME Menu** to switch to another role:

		ໟ – □	×
		\$:
	Q 🔒	YSPRO Administrator	•
(Design Web View	
	Account Manager	Switch roles	•
AR Pe <mark>r</mark> ic	ARROW PURCHASING	Workspaces	•
	Assets Manager	Views	
		Insight cards	.)

When you switch roles, the security settings and web views defined for the new role will be applied.

USING FLOWGRAPHS IN AVANTI

Flowgraphs in Avanti contain shapes that can be linked together visually. A shape can be optionally defined to action any of the following:

- Run an Avanti program
- Execute a business insight

- Switch to an alternative Workspace
- Switch to a different Flowgraph

Note: Currently, Flowgraphs are created and viewed only at the operator level.

PREREQUISITES

To design a Flowgraph you must enable the operator security activity **Flow Graph – Allowed to design flow graphs** in the **Operator Maintenance** program (i.e. IMPPMP):

Activities				×
<u>F</u> ile				
Accept and Close Scancel				
Allow Activity description	Module 🔺	e.net sp	ecific ac	tivity ^
Allowed to upload files to the server	Customization			
 Maintain data in import programs 	Customization			
Allowed to import from client	Customization			
Enterprise Search - Allowed to configure search settings	Customization			
Flow Graph - Allowed to design flow graphs	Customization			
 Module: Electronic Funds Transfer 				
☑ EFT Payment delete	Electronic Funds Tra			
 Module: Espresso 				
ESP Allow maintenance of Espresso menu	Espresso			
ltems:350				~

DESIGNING A FLOWGRAPH

In Avanti, click on the **SETTINGS** icon in the **HOME Menu** to design a Flowgraph:



The Flowgraph Designer is displayed:

	-						
					G	*	\$
+ New 💽 Simple Qu	ery Flowgraph 🔻 🖬 Save	🔋 Delete	Is default	🖍 Undo	🞢 Redo		
Data							
 Decision 							
Delay							
Display		Average pay for	ge days to r company				
Document							
Manual input							
Manual operation	Supplier Query						
Merge							
Or							
Preparation			Banks				
Process		\rightarrow					
Octagon							

Drag a shape onto the blank canvas area:



Click the **EDIT** button to enter a shape title and select to run a program, Business Insight, another Flowgraph or another Workspace:

SYSPR0'Avan	nti Home > Ho	me Menu		🌲 🔍 😁 Phil
				C ★ 🌣
🖸 🛛 🖸 Simple	Query Flowgraph 🔻		🗹 Is default 🍋 🔿	
Data				Diagram options
Decision	Average days to pay for company	Sales Proce	Edit ×	Layout: Tree Down 🔻
Delay			Title	Shape options 🔺
Display			Choose title	Colour:
Document	i i i i i i i i i i i i i i i i i i i		Subtitle	Connection options
Manual input		Choose title	Subtitle	Start Cap:
Manual			Program Select a program	End Cap: Arrow End 🔻
v Merge			Q.	Align 🔺
Or			> Flowgraphs	$\land \lor \leftarrow \rightarrow$
Preparation			> Business Insights	
Process			✓ Workspaces Engineer-to-Order	, Arrange 🔺
Octagon			Landed-Cost-Tracking	
octagon			Make-to-Stock my-new-Workspace	
			> Accounts Payable	

The list of available programs is identical in structure to that displayed in the main menu.

You can run any Avanti program, add a business insight, or select another Flowgraph or Workspace.

Selecting a program will automatically update the **Title** and **Subtitle** (which is displayed as a tooltip).

You can visually link shapes by clicking on a connector button and dragging the arrow to another shape:


Select the **SAVE** button when you are finished and enter a name for the Flowgraph:

Save new diagram	
Please enter the name for the r	new Flow Graph to save
Simple Query Flowgraph	
ок	Cancel

You can optionally make your current Flowgraph the default to be displayed in the viewer – just check the option is **Default**.

EXITING THE FLOWGRAPH DESIGNER

To exit the Flowgraph Designer, click on the **HOME** button.

VIEWING A FLOWGRAPH

To view a Flowgraph:

- 1. Add the Flowgraph Viewer 'card' to any web view using the **Visual Designer**.
- 2. Add a layout section to your web view.
- 3. Select the **Flowgraph Viewer** card.

onfigure new layout section				
1 What would you like to add?				
Card .				
2 Select card type:				
O Bank Balances	C Flowgraph viewer			
🔿 Search Filter	Selowgraph viewer			
O Flowgraph designer	O Inventory Valuation			
O Interactive Map	O Plugins			
O Program List	🔿 Search			
O Session Administ	⊖ SRSMenu			
○ Weather	🔾 Job tracking			

In the example below, the viewer has been added to the **HOME Menu**.

You can select the Flowgraph you would like to view from the drop-down menu in the viewer.

,,,, e,,	SE/_SYSPRO_Fusion/Staging/Te					* 0
vanti Home >	Home Menu					Q 🌲 😫 Phil
Inventory Query Ama	azing view					C ★ 🌣
						1.201
Avorago dave te	Pank Quany 🗿				📕 🖬 Simple Query Flowgraph 🔻	
verage days to pay					- 🗆 ×	
				💷 🛓 Filter	^	
				🖼 🔽 Filter		
↑ Branch ×						
Customer	Customer Name	Salesperson	Customer Branch	Age of zero bal invoic	es{N	
Branch: 10					A	,
0000001	Bayside Bikes	100	<u>10</u>	75		
0000002	Bikes & Blades - North	100	10	153		Average days to pay for company
800000	Garden and Sports	<u>102</u>	<u>10</u>	66		pay for company
0000010	Maniac Sports - North	100	<u>10</u>	100		
Branch: 20						
0000011	Maniac Sports - South	<u>201</u>	20	51	Supplier Query	
Branch: 30						7
0000012	Maniac Sports - East	300	<u>30</u>	51		
Branch: 70						
0000070	Highway Leisure	700	<u>70</u>			Banks
0000071	CC Cycles	<u>700</u>	<u>70</u>		•	
0000071				496.00		
				1 - 8 of 8 it	ems 💌	
		MTD payments	-30,012.00	-1,608,426.00		
		MTD discount				

Click on a shape to run the associated Avanti program.

Alternatively, if the shape has been defined for a Business Insight, then clicking on it will display the Insight detail.

SUPPORT DIAGNOSTICS FOR AVANTI

The **Avanti Event Viewer** can be used by support personnel to help identify and resolve technical problems arising during the use of Avanti.

The viewer logs all events and calls to the system.

For example:



To show the viewer, select the GEAR icon, followed by the **Avanti Event Viewer** option.

Additionally, from the GEAR icon on the **HOME Page** you can switch on **Support Diagnostics**.

At present, this option means that Grid files (in the form of JSON content) are not removed from the ...\base\settings\HTMLUX folder during the run of Avanti for the logged-in user.

These files can be used by support to help resolve issues with grid content not being populated – should the need arise.

When exiting Avanti, these grid files will be removed, and the **Support Diagnostics** option switched off.

USING THE VISUAL DESIGNER

USING THE VISUAL DESIGNER IN AVANTI

To modify any web view in Avanti, you use the **Visual Designer**.

Note: Any web view customized using the **Visual Designer** in Avanti will only appear in Avanti. If you wish to design a web view for use in the SYSPRO Client, please read the section <u>Using the Visual Designer in SYSPRO</u>.

For example, to add or modify a Business Insight shown in a Tile, click on **Design Web View** from the **SETTINGS** icon (🔯):



Except for when editing the **HOME Page**, the **Visual Designer** will be displayed in a new instance of Avanti in a separate browser TAB:

→ C ① File file:///C:/RND800/BA	SE/_SYSPRO_Fusion/Staging/TestHarnessRelease	eBC.html?SecondInstance=true&OpenP.	☆ 0
YSPRO'Avanti > Visual Designer			Phil
I (±		X 🔒 🖬 📼	~ ?
Add toolbar item Stock code		🕒 Add toolbar item	Notes 🗸
🖪 Add layout section	🕒 Add layout section	🕒 Add layout sectio	on
		co Links	^
	E	B	>

Click on the **Add Layout Section** to add another 'Tile' section:

hoose a layout section				
Layout section				1
Tile section				1
Card				1
Form				1
Grid list				1
Tree list				
				.

Select **TILE SECTION**, optionally style the section, and click **Add Section**:

1 What would you like to add?	2 Style the section		*
Tile section Layout section preview My Favorites Tiles	Section title (not required) My Favorites Tiles Add an icon →	Section collapsible	
		Cancel Add section	*

Now click on the **ADD** button to add a tile:

	🛃 Add layout section	
N 💠 /orites Tiles	Tiles	:

And then select the KPI or program tile to be added:

Select tile to add:		2 Configure tile:		
elect item		Tile width		
KPI Customer Management	>	🕑 Small	🔿 Large	
KPI Financials	>	Main text colour		Clear colour selections
KPI Marketing and Sales	>			
KPI Operations	>	Tile background colour		
Metric Customer Management	>			
Metric Lot Batch Management	>	Add an icon \rightarrow		
Metric Marketing and Sales	>			
Metric Operations	>			
Program tiles	>			
				Cancel Add tile

USING THE VISUAL DESIGNER IN SYSPRO



To design a web view in SYSPRO, click on the Settings icon and select **Design Web View**:

The Visual Designer in SYSPRO is used to create web views for use in SYSPRO as well as for Avanti.

Therefore, as the **Visual Designer** loads in SYSPRO, the following checks take place:

- 1. If an Avanti web view pre-exists it will be automatically loaded for editing.
- 2. If a SYSPRO Client web view pre-exists it will be automatically loaded for editing.
- 3. If both Avanti and SYSPRO Client web views pre-exist then a message box will appear asking which web view is to be loaded for editing:

Web View Version	×
A Web View for both Avanti and SYSPRO Client exists f program. Please select which Web View you would like to edit.	or this
→ Avanti	
\rightarrow SYSPRO Client	

4. If neither Avanti nor a SYSPRO Client web view pre-exists, then a message box will appear asking which type of web view you would like to create:



USING THE VISUAL DESIGNER IN CLIENT/SERVER MODE

If you are in client/server mode in SYSPRO, you will not be able to create or edit a web view for Avanti, unless you are designing by Role. The reason for this is that all customization files for non-role users are saved on the client machine. Avanti cannot access such customization files since Avanti can only access files on the SYSPRO server.

You can, however, use the **Visual Designer** in Avanti to create or design web views for non-role users, since this does not rely on customization files residing on a client machine. If you are designing for a role, then you can create and design a web view for Avanti even when running in client/server mode. This is because all customization files for roles are saved on the application server, to which Avanti has access.

CREATING A NEW WEB VIEW

From within the **Visual Designer** on the toolbar, select **New** to create a web view for either Avanti or for the SYSPRO Client:

Create New Web View	×
Please select which type of Web Avanti SYSPRO Client	View you would like to create.
Use application template	OK Cancel

If a standard template for the application exists, then you can check the **Use application template** to apply the template as your starting point for your web view.

SAVE AS A DIFFERENT WEB VIEW

You can select to save the current web view as a different type of web view. In the **Visual Designer**, click on **Save As** to select to save the web view as a different type.

For example, if you are editing an Avanti web view you can save it as a SYSPRO Client web view, and vice versa.



TECHNICAL INFORMATION REGARDING WEB VIEWS

web views are saved as JSON files, named by the program.

Operator level When designing at the operator level, web views are saved in the following folder: ...\Settings An example of this for a web view for Avanti: UX_operator_ARSPENLZ.JSON An example of this for a web view for SYSPRO Client: UX_operator_ARSPENLZ_SYSPRO.JSON

Role level

When designing at the ROLE level, web views are saved in the following folder:
 ...\Settings\Role_xxx
An example of this for a web view for Avanti:
 ARSPENLZ.JSON
An example of this for a web view for SYSPRO Client:
 ARSPENLZ_SYSPRO.JSON

Workspaces by Roles will be assumed to be for Avanti only, as there is no mechanism for surfacing such web views in SYSPRO at present.

DISPLAYING CUSTOMIZED PANES IN AVANTI

Some types of Customized Panes in SYSPRO can be displayed in Avanti.

The following table indicates which types of Customized Panes can be added to a web view using the **Visual Designer**:

Type of Customized Pane	Can be added to a web view	Will execute when running in Avanti
Graph	Yes	Yes
List view	Yes	Yes
Form	Yes	Yes

Type of Customized Pane	Can be added to a web view	Will execute when running in Avanti
.NET User Control	No	Depending on option (see below)
SRS Report	No All SRS reports can be displayed in Avanti from the main menu.	No
PDF Viewer	No	No
Search Window	No	No
Executive Dashboard	No	No
RTF Notepad	Yes	Yes

HOW TO ADD A CUSTOMIZED PANE TO A WEB VIEW TO DISPLAY IN AVANTI

To explain how to add a Customized Pane to a web view, we will use the standard **WIP Job Variance list view** that's available as a Customized Pane template, and we will add this to SYSPRO's main menu.

Work in Progre	ss Job Variance		×
Show completed	d jobs Job number		
Job	Description	Cost Variance	% Variance 🔨
00000137	Bicycle	466,041.67	51.66
00000140	Handle Bar Assembly	0.00	0.00
00000141	Radially Spoked Front Wheel	0.02	0.00
00000142	Radially Spoked Rear Wheel	0.02	0.00
00000146	Racing Bicycle	-91.65	-0.06
00000147	Racing Bicycle	74.35	0.24
00000148	Racing Bicycle	-191.00	-0.54
00000151	Racing Bicycle	-191.00	-1.78
00000149	Racing Bicycle	0.00	0.00
00000150	Racing Bicycle	0.00	0.00
00000152	Bicycle Brake Assembly	0.00	0.00
00000154	Racing Handle Bar Assembly	70,714.00	99.68
00000155	Racing Spoked Front Wheel	69,619.10	100.00
00000156	Racing Spoked Rear Wheel	65,919.10	100.00 ¥

In addition, two toolbar captions have been added to this pane – a **Show completed jobs** checkbox and a **Job number** field.

Here are the Pane properties for this Customized Pane:

Pane Properties	×
Window title	Work in Progress Job Variance
Object type	📃 Listview
VBScript file name	settings\Phil_VBS_IMPMEN09
Initial docking position	Left
Form attributes	
Pane Caption	
Refresh details	
Toolbar control 1	
Caption	Show completed jobs
Icon	Icon 🗸
Control type	Checkbox 🝷
Toolbar control 2	
Caption	Job number
lcon	lcon
Control type	Edit control

Now launch Avanti, and select to **Design Web View** from the **HOME Menu**:



Select a two-column layout:

- The first column being small (to hold the Customized Pane toolbar buttons)
- The second column being larger (to hold the data grid)

SYSPR0'Avanti	Home	> Home Menu	🌲 🔍 😝 Phil
🗖 🗉			X 🖬 🖬 🗠 📿 🥝
Column Layouts mn layout	×	Add toolbar item	🕒 Add toolbar item 📿 ★
		🖪 Add layout section	🛃 Add layout section
		Visual Designer: Main Menu Editing: settings\UX_P	hil_IMPMENLZ.JSON (Avanti)

Select to add a Layout Section to the larger layout section.

Select **Grid List**, followed by the **Work in Progress Job Variance** option and click on **Add Section**:

What would you like to d list			Section	tyle the se n title (not		d)	
Select grid list:				b Variance in icon →			Section collapsible
AR at a Glance 📀	Work in Progress J	ob Variance	Border				
			⊞	÷	-		
Layout se	ection preview		Size				
IP Job Variance			s	М	L		
Column Column Co he ₩ork im Progr							
							Cancel Add section

Click on **Save layout**, and Avanti will refresh your **HOME Menu** and you will see the **Job Variance** list view:

a		lah avarbar		💷 👱 F	ilte		
C v		Job number		• • •	lite	r	
how com	ple	ted jobs er and d	rop	it here to group by t	hat	t column	
Job	:	Description	:	Cost Variance	:	% Variance	
0000013	7	Bicycle		466,041.67		51.66	
00000140	2	Handle Bar Assembly					
0000014	1	Radially Spoked Front Wheel		0.02			
00000142	2	Radially Spoked Rear Wheel		0.02			

For most Customized Panes you will now have to add any toolbar buttons to the web view, but a list view is different in that it will automatically display the **REFRESH** and any other pane toolbar buttons in the grid toolbar area. Thus, in the example above, the **REFRESH** button, **JOB NUMBER** field and **SHOW COMPLETED JOBS** are displayed in the grid toolbar.

The **REFRESH** and **SHOW COMPLETED JOBS** are displayed as icons in the toolbar because of their associated icons in SYSPRO.

For the purposes of this example, we will now add the customized pane toolbar buttons to the web view.

Note: Toolbar buttons that are edit controls (i.e. entry field and check box type) should be added to a FORM in a web view, and simple (non-editable) buttons should be added to a LAYOUT section.

Select **Design Web View** and add a **FORM** layout section (Single Form) to left-hand section.

Click on the **PLUS** icon to add fields to the Form.

Click on Entry Fields, and select CustomizedPaneButtons for Work in Progress Job Variance:

1 Search for or select a field below		
earch for a field		
All / Entry Fields		
CustomizedPaneButtons for AR at a Glance		>
CustomizedPaneButtons for My form		>
CustomizedPaneButtons for Sample Stacked Bar		>
CustomizedPaneButtons for Work in Progress Job Variance		>
	Cancel	Add field

Add the two fields **JOB NUMBER** and **SHOW COMPLETED JOBS** to the form:

Search for or select a field below		
ch for a field		
All / Entry Fields / CustomizedPaneButtons for Work in Progress Job Variance		
) Job number		Quick add
Show completed jobs		
	Cancel	Add field

To add the **REFRESH** button to the web view, add a single-column layout section:

Configure new layout s	ection						
1 What would you like	e to add?						-
Layout section						1	
2 Select a layout sect	ion						
1 column	0000			I	8	\bigcirc	
— т							
	Layou	t sectior	n preview	V			

Click on the **PLUS** icon to add a widget to this layout, select **Links**:

Display Fields			> ^
Entry Fields			>
Links			>
	or		
Free text field			-
		Cancel Add field	

Select ToolbarPaneButtons:

SmartTags	>
Listviews	>
ToolbarButtons	>
ToolbarPaneButtons	>
	Cancel Add field

And then select and add the field **Refresh (Customized Pane: Work in Progress Job Variance)**.

To enhance the appearance of the field, select the **Show as button** option:

Search for or select a field below	 Field styling options 	
All / Links / ToolbarPaneButtons	Show field caption Text to display	
efresh (Customized pane: Work in Progress Job Variance)	Refresh	
efresh (Customized pane: My form)	Text alignment	
efresh (Customized pane: AR at a Glance)	E E E	
lick me (Customized pane: AR at a Glance)		Button colour
efresh (Customized pane: Sample Stacked Bar)	Show as button	
un a script (Customized pane: Sample Stacked Bar)	Edit icon →	
		Cancel Save changes

Now click on **Save Layout**. The **HOME Menu** web view should now look like this:

SYSPRO'Avanti Home > Ho	ome Menu				🌲 Q	e Phil
					с \star	\$
	990	and the second	ALCONT OF THE R.	Service - Service -		
Refresh	WIP Job Varia	nce				
	Refresh Job	number			Filter	
Job number	Drag a column	header and d	Irop it here to group by that o	olumn		
Job Humber	dof	:	Description :	Cost Variance	% Variance	
Show completed	00000137		Bicycle	466,041.67	51.66	
lobs	00000140		Handle Bar Assembly			-11
	00000141		Radially Spoked Front Wheel	0.02		
	00000142		Radially Spoked Rear Wheel	0.02		
	00000146		Racing Bicycle	-91.65	-0.06	
	00000147		Racing Bicycle	74.35	0.24	
	00000148		Racing Bicycle	-191.00	-0.54	
	00000151		Racing Bicycle	-191.00	-1.78	
	00000149		Racing Bicycle			
	00000150		Racing Bicycle			
	00000152		Bicycle Brake Assembly			
	00000154		Racing Handle Bar Assembly	70,714.00	99.68	
	00000155		Racing Spoked Front Wheel	69,619.10	100.00	-
	4					•
					1 - 112 of 112	items

ADDING A NOTEPAD TO AVANTI

Notepads that are built into a SYSPRO application, or Customized Panes that use the notepad control, can be added to a web view to be displayed in Avanti.

Notepad	×
A 🖶 🐰 🗈 🖹 🕤	→ B I U = = = 31
Notepad notes as ente	d into <u>SYSPRO's</u> notepad in the the main menu
Date	To do
Today	Notify marketing of our latest
	release
1	>

Here's an example of SYSPRO's notepad that's included in the main menu:

And here are the same notes displayed in Avanti:

→ C ① File file:///C:/RND800/BASE/_SYSPRO_Fusion/Stagi	ng/TestHarnessRelease	BC.html# 🕇 😖
🗧 👸 SYSPRO'Avanti Home > Home Menu		🌲 🔍 😫 Phil
stomer Query Inventory Query Amazing view Avanti Show messages		C ★ 🌣
Customers Deposits and Deposits		
	Notepad notes as menu.	entered into <u>SYSPRO's</u> notepad in the the main
	Date Today	To do Notify marketing of our latest
Release 원 GL Journal Entry원 Customers 원 Maintenance		release
Sales Order 🔁 Back Order 🔁 Back Order 20 Entry Review Release		
	4	Product Colors hu Denior

To add a notepad to a web view, launch the **Visual Designer** and select to add a new Layout Section. If the application includes a notepad control this will be indicated:

configure new layout section	
1 What would you like to add?	Configure new layout s
Notepad 🧨	
Layout section	1 What would you like
Tile section	
Card	Notepad
Chart	2 Select notepad wide
Form	
Grid list	🔿 SYSPRO Notepad
Tree list	
Notepad 🗸	
Notepad 🗸	

Both built-in notepads and any customized pane notepads will be displayed here.

Select the notepad, click on **Save Layout** and any notes associated with the notepad will automatically be displayed in Avanti's notepad.

When you click anywhere in the Avanti notepad, a popup menu bar will display the available functionality:

Date Foday	To do Notify marketing of our latest release
	Times New Ro
-	
	Product
]	Create a 2 x 3 table
-	🖼 Table Wizard

Considerations:

- The notes entered in Avanti are in HTML format and these are converted on-the-fly to the RTF (rich text format) required by SYSPRO's notepad control.
- If the notepad in SYSPRO includes a **SAVE** button, then this will be displayed in Avanti's notepad toolbar as well.
- Notes in Avanti are automatically saved where appropriate, just as they are in SYSPRO itself. For example, there is no SAVE button in SYSPRO's main menu notepad because any notes entered there will be automatically saved when you exit SYSPRO. And in Avanti the same principle applies, when you exit Avanti then any changed notes will be automatically saved.

HOW TO PRESENT APPLICATION BUILDERS IN AVANTI

The **Application Builder** in SYSPRO is a collection of customized panes hosted in a SYSPRO program.

Up to 20 such programs (named **IMPDH1** thru **IMPDH9**, and **IMPDHA** thru **IMPDHK**) can be built in SYSPRO, and these can be surfaced in Avanti, either at the operator or role level.

To present an application builder in Avanti, follow these steps:

Create the Customized Panes in SYSPRO first.
 For example, here's a blank Application 1 in SYSPRO (IMPDH1):



After adding two Customized Panes using the built-in samples for a list view (Executive Financial Summary) and a graph (Sample Stacked Bar), it looks like this:



- 2. Exit out of the Application Builder to save away any new Customized Panes just added.
- 3. Relaunch the Application Builder and select **Design Web View**:



4. Select to design for Avanti:

No Web View exists for this program. Please select which type of Web View you would like to crea	ite.
→ Avanti	
→ SYSPRO Client	
→ Design Template	

5. Click on Add layout section and add the Grid List Executive Financial Summary and the chart Sample Stacked Bar.

Visual Designer: Application 1 Editing: settings:UX_Phil_IMPDH1LZJSON (Avanti) se 🔚 Save Save As New Delete View Design Template Edit Macro	– ۵ × ۴ ،
	∽ ~ Q
Add toolbar item	Add toolbar item
Add layout section	Add layout section
\checkmark	
Add or drag layout sections to any	of the columns above to start

6. Remember to add a CLOSE button to the toolbar:

Select item to add:		2 Configure t	toolbar iten	1:	^
< All / Standard	~	Item text			
Application Title		Enter toolbar iter	n text		
🗙 (Close)		Item tooltip Enter toolbar too	ltip		
💿 (Import)		Select an icon		Clear icon s	election
o (New)		· · · · · ·	00		~
OnClose VBScript Event	~	× =	×	•	
				2 2	•
			Cancel	Add toolba	ritem

7. Save your web view.

In Avanti, to run this Application Builder, click on the hamburger menu, open the **Administration** folder, and click **Application 1** to run:

SYSPRO'Avanti	Home	>	Home Mer
Search for a program			<u> </u>
Recent programs			>
Business Insights			>
🖿 Accounts Payable			>
🖿 Accounts Receivable			>
Administration			^
(i) About SYSPRO			0
Application Builder			^
Application 1			0
Application 2			0

Your Application 1 will now be launched.

The title of the Application Builder will be displayed in the Avanti menu bar:

SYSPRO'Avanti Home	e 💙 Avanti App Builde	r		A	Q	9 Phil	
					× Close	\$	
ecutive Financial Summar	y	The second	Product Sales by Region		1000	100	1
C	🚇 ± Filter						
Drag a column header and drop		mn	10 - 8 -			-	
	: Value		<u>8</u> 0 0 0 4 -				
Description	-	:	ю́ 4 -				
Bank Balance AP Balance	63,946,424.70		2 -				
AP Balance AR Balance	7,146,163.94		California Wash	ington Oregon	Arizo	na	2
WIP Valuation	8,849.92			Region			
Inventory Valuation	11,369,232.47		View data				
Purchase Order Commitment	11,907,646.56		View Gata			Y	
Sales Order Commitment	325,652,734.08						
Sales Orders Taken - Today	020,002,10 100						
Sales Orders Taken - Yesterday							
Sales Orders Taken - This Week							
		w.					

NOTES ON .NET USER CONTROLS AND AVANTI

By default, .NET User Controls added to an application in SYSPRO will not execute when you are running Avanti because the control is not necessarily suitable to be rendered in a Web page.

However, the output from a user control could be directed, for example, to a list view which in turn can be displayed in the **Visual Designer**.

The control must be explicitly informed that it must be executed by enabling the **Execute control when running in Avanti** option:

.NET User Control			
Assembly name		SYSPROMA_ReportQueue.dll	Q
Assembly namespace	ce	SYSPROMA_ReportQueue.Docum	en 👻
Namespace method	ls	QueryDocumentInbox	*
Execute control whe	n running in Avanti		
	User controls do r when running in A this option is chee	Avanti unless	

If a .NET User control has any User Interface interaction, then this will not appear in Avanti.

Here are some suggestions on how to convert User Controls for use in Avanti:

Option 1: Convert to SYSPRO UI and use VBScript

The business logic can be kept the same, but all UI must be removed and instead sent to SYSPRO via events to create list views, forms and charts using VBScript Customization and power tailoring.

Option 2: Create Customized Cards

UI controls that are not supported for Avanti would need to be built as a card with HTML and JavaScript.

Skills required: HTML, JavaScript, Jquery.

Cards can be used in both Avanti and web views within SYSPRO, making them ideal for cross-platform use.

The Card builder allows you to build a customized card based on a business object or xml file. Therefore, using the "Builder" card enables the following:

Design a card

Create a new card by selecting from various layout types (i.e. tabs, section headings, carousels, accordions, and tables).

Map fields

Map XML fields (from SYSPRO business objects or any .XML file) to the layout and once the card is created, the fields are populated with the data. If required, you can also change description fields easily by selecting them from the preview.

Define XMLIn

If a SYSPRO business object was selected, the XMLIn fields for the business object are displayed in a tree structure and values can be customized by selecting a field and changing it accordingly.

Note: There is no validation on the selection made as this happens when the business object is called with the customized values.

When you select an .XML file instead of a business object, you can define a **BindFunctionName** which executes when the card is selected in SYSPRO.

Save card

Once you save the card, the ***.html** and ***.xml** files are stored in the **\Samples** folder.

Option 3: Native Avanti Application

A development extension for Visual Studio is available from **SYSPRO 8 2020 R2** to allow third party developers to develop new plugin modules for Avanti entirely in C# .NET. These will be completely debuggable, able to call Business Objects and will get all of Avanti's customization and personalization functionality out of the box for anything they develop.

See the <u>SYSPRO Avanti Development</u> section for more information.

USING E-SIGNATURES IN AVANTI

When an e-signature in SYSPRO is triggered various actions can take place.

The following actions will not work correctly in Avanti:

- Running an application (an .EXE)
- Running an SRS report
- Emailing

CUSTOMIZING APPLICATIONS IN AVANTI

This section describes how to customize applications in Avanti, such as adding scripts to change the behavior of form fields or grid data or extending the capabilities of any application to display more information, either from the SYSPRO database or indeed from any external application.

This area of the product is known as **Power Tailoring** in SYSPRO and there are two books devoted to this subject that can be found on the Internet (search for 'SYSPRO Power Tailoring Part 1' and 'SYSPRO Power Tailoring Part 2').

A full understanding of Power Tailoring and what's possible in terms of customization is beyond the scope of this document, and instead this serves to provide a high-level explanation of how to achieve the same end result in Avanti.

Just as a starting point, to customize aspects of a SYSPRO application you would typically right-click on a form field, a toolbar, a grid column header or docking pane window title in order to access the VBScript editor, or to add a customized pane or to generally access customization capabilities.

In Avanti, there is no notion of a 'right-click' using a mouse. Instead, all the customization capabilities in Avanti are controlled by a single program: **Customize Application**.

This can be accessed from the **Settings** icon in any application, including the **HOME Page**.



Considerations:

- This menu option is only available if the operator has the VBScript security option enabled and is not logged in as a role.
 - In SYSPRO, the same program can be accessed (from the Gear icon) and used with identical capabilities.
- In Avanti, it is typically a two-stage process for a web view to be enhanced with new content or controls.

First, you customize the application to add capabilities, and second you modify the web view (using the **Visual Designer**) to position the new controls or content.

For this section, we will customize the **Inventory Query** program.

All applications in Avanti or SYSPRO are generally made up of grids, form fields, charts, notepads and toolbar buttons. You can also have user-defined 'customized panes' added to any application; a customized pane can contain a grid, a form or indeed a number of other types of controls.

The **Customize Application** program has the following capabilities:

			Design W	/eb View Customization F	Profiler Customize Sm	art Links 🏾 🎗
List Views	Form Fields	Toolbar Buttons	Custom Form Fields	Additional Component	s Customize	d Panes
nis shows all th	ne list views in this application	Select a list view to cust	omize it.			
					Filter	
	List view description		Customized p	bane		
1	Master sub-accounts					
/	Stock Code X-ref					
1	Stock Codes					

List views

- Add a custom column
- Edit a VBScript to change the behavior of the grid
- Apply conditional formatting to the grid contents
- Add or remove a grid column's visibility
- Remove a custom column

Form fields

- Edit a VBScript for a form or form field in the application
- Add or remove a field's visibility in SYSPRO
- Remove a custom form field

Toolbar buttons

• Edit a script for any toolbar button used in the application

• Custom form fields

- Create or modify a custom form field
- Add a **custom form** field to the application
- Add a field from an associated **Master Table** to a form
- Add a **scripted** field to a form
- Add an **image** field to a form

Additional components

- Create your own customized pane or component
- Add a pre-built component to the application

Customized panes

- Edit or remove any existing customized panes
- Reset the layout for the application

In addition, you can edit the web view(s) associated with the application by clicking on **Design Web View**. However, this is not allowed if you are customizing the **HOME Page**, as web views there are known as **Workspaces** and are handled differently.

All applications have a **Primary Layout**, and some have multiple web views that collectively make up the Avanti user interface:

Design Web Vi	ew				×
			C	\$	
An application of design or delete		e up of multiple Web	Views. Select one to)	
}		🖻 于 Filter			
Web View layout	name	Edit Web View	Delete Web View		1
	name		Delete Web View	•••	1
Web View layout	name	Edit Web View	Delete Web View	•••	
Web View layout Primary Layout		Edit Web View Edit	Delete Web View	•••	

Select **Edit** to design or modify a web view – this calls up the **Visual Designer** in a separate TAB in the browser. If a web view has already been designed, then you may click on the **Delete** hyperlink.

To view all the customizations applied to the application, select the **Customization Profiler**, which is especially useful to view any VBScripts that have been defined.

LIST VIEWS

To change the behavior of a list view or grid, click on the required item.

Changes to list views	may only take	effect next time	the program is launched.	
=+ Ē tΞ			▲ Filter	
Column description	Visible	Data type	Remove custom column	
Sales order	Z	Alpha		
Date	Z	Date		
Туре		Alpha		
Warehouse		Alpha		
Period	~	Alpha		
Ref/invoice		Alpha		
Trn type		Alpha		
Quantity		Numeric		
Customer	 ✓ 	Alpha		
Transaction value	Z	Numeric		
Customer name		Alpha		-

You can then perform one of the following actions:

- Add a custom column
- Edit a VBScript
- Apply conditional formatting (see the <u>Modifying the Avanti Grid</u> section for more information)
- Add or remove a grid column's visibility
- Remove a custom column

Note: These changes will not reflect in Avanti until you exit the program being customized and reload it.

FORM FIELDS

This TAB page displays all the form fields that are available in the application and indicates any custom form fields that have been added.

You can adjust the visibility of any form field – but that only affects the form field when running SYSPRO.

In Avanti, to edit a field's visibility in a web view, you use the **Visual Designer** to design a web view.

			Design V	Veb View	Customizatio	n Profiler	×	\$
List Views	Form Fields	Toolbar Buttons	Custom Form Fields	Additional (Components	Custom	ized Pa	anes
nis shows all the form	m fields in this a	pplication.						
G				[969]	▲ Filter			
orm fields	Script	Data ty	be	Visible in SYS	PRO			
Distribution	Edit							
Movement Options	Edit							
Notes	Edit							
Production	Edit							- 1
Stock Code Details	Edit							
Style		Drop dov	vn (Custom:STK)	✓				
Stock code		Alpha		✓				
Description		Alpha		<				
Long description		Alpha		<				
Dangerous goods		Alpha		<				
Stock code on hold f	lag	Alpha		✓				
Date of supersession	n	Date						
Uses preferred supp		Alpha		<				
Stocking unit of mea		Alpha		<				
Alternate unit of mea		Alpha		<				
Other unit of measur	-	Alpha		<				
Manufacturing unit o	f measure	Alpha		✓				-

Form fields are grouped together logically to make it easier for identification.

Scripts that modify the behavior of a form or form field are linked to each form. To edit a script for a form, click on **Edit**.

A display form has only three events – OnLoad, OnRefresh and OnMenuSelect:

vailable Events	OnLoad	•	A Syntax Check Procedures	Code Generation	•	
	FORMEVENTS				i ×	•
	OnLoad				-	
1 'This scr			n and field events.	Variables		^
2 'You must 3 Option Exp	OnMenuSelect		nctions.	➡ Filter		
4	istribution_OnLoad()					104
6 7 End Functio				Variable †	Events	
y chu runceit				► CustomForm		*
				CustomizedPanes		
				 Distribution 		
				MovementOptions		
				► Notes		
				 Production 		-

If the form is editable, you can:

- select **Edit** to use the script editor.
- select a specific field and click on Edit Event.
 See the section <u>Using the Script Editor</u> for more information.

			Design Web	View 🌪 Customizati	on Profiler	< 🌣 -
List Views	Form Fields	Toolbar Buttons	Custom Form Fields	Additional Components	Customized	Panes
his shows all	the form fields	in this applicatio	n.			
G				🖭 👤 Filter		
orm fields		Script	Data type	Visible in SYSPRO		
 Distribution 		Edit				
Movement Op	otions	Edit				
 Notes 		Edit				
 Production 		Edit				
 Stock Code D 	etails	Edit				
 User-defined 		Edit				
Warehouse H	istory Details	Edit				
Warehouse H	istory Selection	Edit				
Combine w	arehouses	Edit event	Checkbox	~		
Warehouse	eselection	Edit event	Option	~		
Warehouse	;	Edit event	Alpha	~		
List of ware	ehouses	Edit event	Hyperlink	~		
Multiple co	mpany values	Edit event	Checkbox	~		Ū
Warehouse Va	alues Details	Edit				



An editable form has many available events, as indicated in the following example:

INPUT MASKS

The application of input masks (i.e. masked text characters) to any form field in the SYSPRO Desktop is also applied to the same form field within the Avanti web view from **SYSPRO 8 2022**.

For example:

In the SYSPRO Desktop, you can define the mask input text to be applied to the Telephone form field within a certain program as:

(_0_0) - _0_0_0_0

The characters 0 *indicate that this must be entered as a numeric digit.*

Therefore, your configuration of these input masks is retrieved from the SYSPRO Desktop and applied accordingly within the SYSPRO Web UI (Avanti).

TOOLBAR BUTTONS

This TAB page indicates all the toolbars used in the application. Each toolbar can have its own VBScript that can modify the behavior of a button.

CUSTOM FORM FIELDS

This TAB page displays all the available custom fields that can be added to the application. Once added, they can be surfaced in a web view either using the **Visual Designer** or can be added directly to the web view from the Customize Application program.

ADDING CUSTOM FORM FIELDS

Custom form fields are linked to 'key fields', such as a Stock Code or Customer. Select the **Custom Form Design** option to view all the available custom form types. You can then start to create your own custom form fields. Alternatively, you can select the hyperlink in the Custom Form Type column to access the **Custom Form Design** for the specific type:

Form name		 Maintain form 	•						0		\$ - 1
							:≡ Field definition				-
👜 👱 Filter				Caption	Style						
Caption	Field name	Column name	Туре	Length	Decimals						
Style	STY001	Style	Alpha	10	0	*	Field name	STY001			
oading Factor	LOA001	LoadingFactor	Numeric	3	2		Column name	Style			
Look ahead window	LOO001	LookAheadWindow	Numeric	2	0		Field type	Alpha		•	
Special & 10	SPE001	Special10	Alpha	10	0		Field length	10			17
argeField	LAR001	LargeField	Alpha	100	0		Decimals			-	
Account	ACC001	Account	Alpha	10	0		Default	(Spaces)			
Size	SIZ001	Size1	Alpha	100	0		Delaul	lobaccol			
Numeric zero decs	NUM001	NumericZeroDecs	Numeric	12	0		Field validation				

In this TAB page, the system identifies all the key fields used in the forms and presents the list of custom form fields.

Click on the **Add Field** hyperlink to add the field to the form.

				Design V	/eb View Cu	istomization Pro	filer 🏟
List Views F	form Fields Too	bar Buttons	Custom Form Fields	Addition	al Components	s Customize	d Panes
nis shows all the c	ustom form fields t	hat may be ad	lded to this applic	ation.			
Custom Form Des	sign						
Master Table Fields	Scripted Fields	Images		PUF	Filter		
Form name	Custom for	Field	Descriptio	n	Туре		
 Distribution 	Stock Code						
Production	Stock Code						
Stock Code Details	Stock Code						
		STY001	Style		Alpha	Add field	
		LOA001	Loading Fa	ctor	Numeric	Add field	
		LOO001	Look ahead	d window	Numeric	Add field	
		SPE001	Special & 1	0	Alpha	Add field	
		1.40004	LargeField		Alpha	Add field	
		LAR001	<u> </u>				
		ACC001	Account		Alpha	Add field	

In addition, in a similar manner to custom form fields, you can also add fields from any Master Table linked to each form.

ADDING MASTER TABLE FIELDS

Click on **Master Table Fields**, select the field and click on **Add Field**. Note that you will not be allowed to add a field if it has already been added to the form.

		S				•
his shows all the n	naster table fields t	hat may be added	to your forms			
			Pas			
Form name	Master table	Field name	Description	Туре		
 Distribution 	Inventory Master					A
Production	Inventory Master					
▲ Stock Code Details	Inventory Master					
		StockCode	Stock code	Alpha	Add field	
		Description	Description	Alpha	Add field	
		LongDesc	Long description	Alpha	Add field	
		AlternateKey1	Alternate key 1	Alpha	Add field	
		AlternateKey2	Alternate key 2	Alpha	Add field	
		EccUser	Responsible ECC user	Alpha	Add field	
		StockUom	Stocking unit of measure	Alpha	Add field	
		AlternateUom	Alternate unit of measure	Alpha	Add field	

ADDING SCRIPTED FIELDS

You can also create and add **scripted fields** to any form. Scripted fields are not associated with any table or custom form; instead, they serve as containers for whatever data you wish to hold or edit. The only way to populate such fields or to use the captured data, is via VBScript.

Select **Scripted Fields** to choose a field to add to any form, or to delete a scripted field, or to add a new one.

						\$
scripted field is a contair	ner that can be	placed on a forr	m and is modifi	ed using VBS	cript.	
=₊			PDF 4	Filter		
-+						
	Туре	Length	Read-only	:		
=+ Caption Truck	Type Alpha	Length 25	Read-only √	-	Delete	

Adding a new scripted field:

		8	€	۰.
Caption	Location			
Туре	Alpha		•	
Length	15			
Decimals	0		*	
Read only				

Adding Multimedia Objects

Click on the **Multimedia** button to add multimedia objects (images, documents etc.) associated with key fields. A list of the key fields for which multimedia objects can be shown is indicated in a list. You can add a multimedia object for any listed key field or remove an item.

								\$	
lultimedia	objects can be asso	ociated with key fields and	d shown i	n the Web Vi	ew.				
				POF	ŧ	Filter		••	•
Caption	Add category	Remove category	E	dit multimedia			Key field value		
Account	Add		E	dit					-
Stock code	Add	Remove	E	dit			B100		
Supplier	Add	L ₃	} E	dit			000000000000001		
									-
							Showing 3 it	om(c)	•

Click on **Add** to add a multimedia category. A list of available categories is displayed:



Once a multimedia item has been added to the Web View, it will look like the screen shot below (if the item is an image). Click on **View** and the document or image will be downloaded to your browser for viewing:

Customer 0000001	۹
Customer Image	View 0000000000001 jpg 3.682 2010/06/05 19:10
Bayside Bikes 0000001 -	۲
	Contact
0000001 -	Contact Credit available Currency
0000001 - Info	Credit Local

You can also define the documents associated with any key field by clicking on **Edit** which calls up the Multimedia definition program.

Using this program, you can define the location of a document to be associated with a key field, or you can define default locations for each category.

							+ 🖤	ā ¢	
					[]				Î
Description	Category	Default	Location	Edit location	Delete	File size	Date la	ist mod	
mage	BMP	Default	%media%key.jpg	Edit	Delete	11 KB	2010/10)/19 04:25 🔺	
PDF document	PDF	Default	%media%key.pdf	Edit	Delete	112 KB	2008/04	4/03 09:17	
Spreadsheet	XSL	Default	%media%key.xlsx	Edit	Delete	6 KB	2021/02	2/10 06:57	
Technical drawing	BM1		BicycleFrame.gif	Edit	Delete	9 KB	2021/02	2/08 01:14	

It is recommended that you define default categories using the reserved words **%media%key**.extension, as this eliminates the need to define a specific location for each key field. Click on the button **Add a default location for a Category**:

Edit Default Location	
	🖬 × 🌣
Object category	PDF Q
Default description	PDF document
Default location using keywords	%media%key.pdf
Reserved keywords that can be used	%stock, %drawing, %alt1, %alt2, %user1, %
1.	

Enter the category you wish to change. For a PDF document you would enter **%media%key.pdf**; this indicates that the pdf document will be found in the folder on the server specified by the **Multimedia** folder location with a filename of the **key** field value with the extension of **.pdf**.

In our example above, the key field value is B100 and therefore the PDF document should be stored as **B100.pdf** in the multimedia folder. You can determine the multimedia folder name by selecting **System Information** from the Gear button in the Home Page and click on **Environment Information**:



Having defined your categories and their default locations, stored documents and images on the network server, and added these items to the **Inventory Query** Web View, it would look like this:

	ĉ				
tock code B100	۹			🖹 Notes 🗸	🔛 Edit 🏼 🎝
Stock code Technical drawing		E Units of measure Purchasing informa Decocol - 19 Bicycles Lead tim Unlimited days	0	CD Links Movements Warehouse history Warehouse values	^
	View BicycleFrame.gif 8,352 2021/02/08 13:14	Supplier Sales information 4,905.00000 Selling price	EA Price basis	QueriesIn Period closing balance	~ nces
Stock code Image	View B100.jpg 10.776 2010/10/19	Coded Pricing method	0.00 Minimum price pct above cost	1.800.00 1.600.00 1.400.00 2.00.00 1.000.00 000.00 000.00 400.00	
Stock code PDF locument	16:25				7 9 11 us balance
Stock code Spreadsheet	2008/04/03 09:17			View data	~

ADDING FIELDS DIRECTLY TO A WEB VIEW

When you add a Custom Form field, a Master Table field, a scripted field, or a multimedia field to an application, then when key fields in the application change the system will refresh the application's forms with new content. But this content is not reflected visually in the Web View unless the field is added to the Web View.

Once a field has been added to the application, you can use the Visual Designer to add that field to the Web View – this has the advantage that you can decide exactly how you wish the field to be displayed in the Web View.

Alternatively, when you add a field using Customize Application, the system will ask if you wish the field to be automatically added to the Web View:



If you select **Add to Web View**, the field will be injected into the *primary* Web View for the application as follows:

1. If the current application has yet to be customized – that is, there is no customized web view for the application – you will be asked if a customized web view should be created:

Web View			
i	application. A customiz	stomized Web View for this ed Web View will now be emplate for this application. nue?	
	Yes	No	

If you select NO, the web view will not be modified by the addition of the new field. If you select YES, the standard JSON template for the application will be copied from the ...\SAMPLES folder to the ...\Settings folder for the operator, or to the Role_nnn folder if you are designing at Role level.

2. The Web View will then be modified by adding the field to the first appropriate form found in the web view.

If there is no form found, then a one-column form will be added to the first layout section of the Web View and the field added to that form.

Note: The system cannot immediately refresh the application's Web View; once all fields have been added to the application (and optionally to the Web View) then you must exit out of the Customize Application program, back to the Home Page to relaunch the application to view the customized changes.

Here is an example of this process. Let's add a custom form field called **Web site** to the **Customers** application and have it displayed and editable in the Web View.

1. Launch the **Customers** application:

Customer 0000001	Q			Notes -	2	0 🗘	
Customer name		L Contact				^	
*		Email	Telephone		Extension		
Bayside Bikes		Accounts@BaysideBikes.co	n 206-555-4562		125		
Short name		Additional telephone	Fax		Telex		
Multi Ship		206-555-4565	206-555-4587				
Nationality		Contact	Ship via code		Ship via descrip	ption	
	۹	Karen Saunders		Q	Road		

2. Select the **Gear** icon, followed by **Customize Application** and click on the **Custom Form Fields** tab. All the available custom form fields (that have already been defined for the system) are now displayed:

	tion: Customers		÷			
			Design Web View C	ustomization Profiler	Customize Smar	rt Links 🌼
List Views	Form Fields	Toolbar Buttons	Custom Form Fields	Additional Compone	ents Customiz	zed Panes
Custom Form D		that may be adde	d to this application.			
Master Table Field	s Scripted Fields	Images		📴 🛃 Filto	er	
	Scripted Fields Custom form type	Images Field	Description	🖭 🛓 Filt	er	
Master Table Field Form name Additonal Fields		0	Description		er	•••
Form name ▶ Additonal Fields	Custom form type	0	Description		er	•••
Form name	Custom form type Customer	0	Description		er	•••
Form name Additonal Fields Contact Details	Custom form type Customer Customer	0	Description		Add field	
Form name Additonal Fields Contact Details	Custom form type Customer Customer	Field		Туре		•••

Click on Add field for the web site field in the Customer Details group.
 After accepting to add the field to the web view, you will see this message:

Web View The Web View has been updated with the field.	
--	--

4. Exit back to the Home Page to relaunch the Customers application and you'll see the **Web site** field displayed:

Customer 0000001	Q				
Web site	www.syspro.com		L Contact		
Customer name *	Bayside Bikes		Email		Telephone
			Accounts@BaysideBikes.com		206-555-4562
Short name	Multi Ship		Additional telephone		Fax
Nationality		Q	206-555-4565		206-555-4587
Customer branch	10	Q	200-000-4000		
	Receivables - North		Contact	~	Ship via code
Geographic area	N	Q	Karen Saunders	Q	
ocographic area	Northern Region		EDI sender code		EDI trading partner
Salesperson	100	Q	EDITP0001		
Sucoporcoll	Tony Dean				
Additional Components

This TAB page displays all the pre-built components that may be added to the application. These components are automatically linked to the key fields found in the form fields in the application. This means that whenever the value in a key field in a form changes (either by direct user input, or the program changing the value) then the associated component is automatically refreshed.

Select **Add** to add the component to the application.

To surface the component in a web view, you must separately call up the **Visual Designer**, locate the grid or chart just added, and then add that to a layout section.

		Design	Web View Customiza	ition Profiler 🗙 🏟
List Views	Form Fields Toolbar Buttons	Custom Form A Fields	dditional Components	Customized Panes
his shows all t	he pre-built components that may be	added to this application	n.	
+ Add your o	vn component			
			🖭 🛨 Filter	
Key field	Component description	Туре		
 Supplier 				<u>▲</u>
 Stock code 				
 Stock code 	Actual Costing (Lots)	List view	Add	
 Stock code 	Actual Costing (Lots) Actual Costing (Serials)	List view	Add	
 Stock code 	2.1			
 Stock code 	Actual Costing (Serials)	List view	Add	- I
 Stock code 	Actual Costing (Serials) Alternate Stock Codes	List view List view List view	Add Add Add lick to add the compone	ent to
 Stock code 	Actual Costing (Serials) Alternate Stock Codes Alternate Suppliers	List view List view List view	Add Add Add	ent to

As an example, let us click on the **Alternate Stock Codes** component shown above. The following message is displayed:



Next, click on **Design Web View** and select to edit the Primary Layout (the **Visual Designer** is launched).

Click on Add Layout Section, select Grid List and you will see the List of Alternate Stock Codes item.

Click on **Add Section** to add this grid to your web view.

What would you like to add?	3 Sty	/le the se	ction			•
rid list	Section Widget	title (not r	required)		Section collapsible	
2 Select grid list:	_	icon →				
Stock Codes	Border s	style				
O Movements for Stock Code	⊞	÷	- 11			
O Wh Values for Stock Code	Size	М	I			
O Wh History for Stock Code	3	IVI	L			
O Contacts Per Supplier						
Layout section preview						*
				Cano	el Add section	

ADDING YOUR OWN COMPONENT

You can also create your own component.

Note: This may require some understanding of Power Tailoring, depending on the complexity of the requirements.

Select **Add your own component** and the customized pane editor is presented:

Component properties Window title *		Listview templates	~
Object type	Graph 🐂 🔻	Graph templates	~
VBScript file name	Graph		
Editable form	Listview		
Ignore OnLoad VBScript	Form Notepad	VBScript text	
Automatic refresh			
Refresh time	5		
Refresh period	Minutes 🔹		
Toolbar caption 1			
Toolbar button type 1	Edit control		
Toolbar caption 2			
Toolbar button type 2	Edit control		

Select the type of object or control that you wish to create. For list view and Graph objects, there are several pre-built templates you can select from, and then modify as required.

You can then click on **Edit VBScript** to create or modify the script associated with the control. For a FORM object, you can design the form by selecting **Design Form**:

				ົ	× 🌣	
Form Preview		🖪 Add f	ield			-
Customer	Q	Caption		Arrival date		
Location		Field type		Algha	•	
Flight number		Add to grou	up	Alpha		
				Check box		
Hotel name				Color picker Date		
		List o	of form fields. Click		~	
			± 📖	Drop down entry		
		-	_	Hyperlink		
			Caption	Group heading		
		Ē	Customer	Multiline		
		1	Location	Numeric		
		-		Radio button Slider	12	
		1	Flight number	Spin button	-	
				Time		
					•	
		Field	properties		^	
		Caption		Hotel name Use {blank} for a blank ca		

To create a new form field, simply enter the CAPTION, select the Field Type and click on **Add Field**. A preview of the form is displayed. You can then provide extra field properties as required.

Note: When you save the form within a customized pane, you must then go into the **Visual Designer** and select the fields you would like to see in your web view.

CUSTOMIZED PANES

This TAB page displays all the customized panes that have been added to the application. From here, select **Edit** to launch the **Customized Pane Editor**.

Selecting **Remove** will remove the component from the application. However, you should note that if you remove a component which has been referenced in your web view, then the component in the web view will not function.

			De	sign Web Vie	w Custor	mization Profile	er 🗙 🏟
List Views	Form Fields	Toolbar Buttons	Custom Form Fields	Additional (Components	s Custom	ized Panes
This shows the co	·	are in this application.		100			
	ut	are in this application. Customized pane type	Script name				

USING THE SCRIPT EDITOR

The script editor allows you to modify the behavior of any control in SYSPRO or Avanti.

Once a script has been defined, it will work unchanged in both SYSPRO and in Avanti (apart from the differences noted in this document).

For this section, we will script the **Stock Code Setup** program (i.e. INVPST). The **Stock Code Details** form has been selected specifically, and within that, the Stock Code event was selected.

The script editor displays the available events for the current field, and the events for the form:



All the available form fields (including any custom form fields that have been added) are displayed in the **Variables** pane. If you want, for example, to script the behavior of the Alternate Key field, select the **Event** hyperlink and select the required event.

Variable 1	Events
▶ SalesDetails	
StockCodeDetails	
AlternateKey1	Ev Insert variable
AlternateKey2	Ev
AlternateStockCodes	Ev OnAfterChange
AlternateSunnliers	Fv OnBeforeChange
VBScript modules	OnButtonClick OnGainFocus
Notepad	OnLostFocus
	OnMenuSelect
	OnLinkClicked

After selecting the **OnAfterChange** event, the script editor will insert the correct code, and then we can select to view the contents of the Alternate Key using the **msgbox** function and by inserting the variable itself:

vailable Events	🚽 🗛 Syntax Check 🛛 Pro	ocedures	-
ode Generation 👻			×
1 ' This script contains functi 2 ' You must not modify the nam 3 Option Explicit	ons for form and field events. e of the functions.	Variables	^
4 5 - Function AlternateKey1_OnAfte 6 msgbox StockCodeDetails.Code0 7 End Function		Filter	(20) 🗶
		Variable †	Ev
		► SalesDetails	-
		StockCodeDetails	
		AlternateKey1	Evente _ Insert variable
		AlternateKey2	OnAfterChange
			OnBeforeChange
		VBScript module	S OnButtonClick
		Notopod	OnGainFocus
		Notepad	OnLostFocus

AVANTI SPECIFIC SYSTEM VARIABLES

The following variables are applicable from **SYSPRO 8 2022**:

- AvantiRunning
 When using the Script Editor, this system variable is set as Y if running in Avanti.
- AvantiURLOpenInTab | AvantiURLOpenInWindow
 These variables allow a script to navigate to a URL when running in Avanti.

CODE GENERATION FACILITIES

Built into the script editor are various functions that automatically generate code that is inserted into the script editor:



These features are fully documented in the **Power Tailoring** guide, except for **Customize Toolbar Buttons** which is explained below.

In this code generation window, the buttons that are associated with the toolbars in the application are displayed in a grid.

Insert VBScript				PDF	<u>+</u>	Filter		
Caption	ID	Enabled	Visibility	Checked		Execute	Value	
Toolbar title: INVPSTT1	-Preferences							-
Save	39000	-	-	-		-		
Close	00009	-	-	-		-		
Toolbar title: INVPSTT3	-ForeignText							_
Add	49001	-	-	▼ -		-		
Delete item	49008	-	-	-		-		
Toolbar title: INVPSTTE	3-StockCodeMainte	enance	Visible					
New	39001	-	Invisible	-		-		
Delete item	39008	Disable	-			-		
Save	39000	-	-	-		-		
Stock code	38001	-	-	-		-		
Product class	01020	-	-	-		-		
First item	39009	-	-	-		-		
Prev	39003	-	-	-		-		
Novt	39002	-	-	-		-		-

For each button you can select the following actions:

- Enable or disable a button
- Add or remove a button's visibility
- Check or uncheck a button
- Force a button to be 'executed' (i.e. as if you had clicked on it)
- Change the value of a button (this only applies to entry controls)

Select the properties you wish to apply and click on Insert VBScript.

This will generate the following code in the script:



VBSCRIPT MODULES

You can also create script modules that allow you to create modular code.

Each module can be called from your main script code.



CUSTOMIZATION MANAGEMENT BY ROLE IN AVANTI

You can use the **Customization Management** program (i.e. IMPROL) in SYSPRO to manage customizations of web views or workspaces by role.

This is accessible from the **Administration** tab of the SYSPRO Ribbon Bar.

From here you can view and manage the workspaces and web views created at the role level.

a	yout	Category *	Select <u>r</u> ole: {ALL	} •	→ 🗄	E <u>x</u> pand	<u> ■</u> <u> C</u> ollapse	🖫 <u>E</u> xport 🛅	<u>I</u> mport	
v	errid	e List								¢.
1	Cue	stomized	ayouts by R	ole						т.
VDCorinte	Cu	stornizeu i	ayouts by N							-
1.	÷	tearch	text	🗶 🗸						
	Role	e/Program a	and Layout	Description	Reset	Сору	Associated V	BScript		^
	4	Account Mar	ager (100)		reset	сору				
		Flow grap	h	Flow_test flow.xml	delete					
		Workspac	e	Credit Checking	delete					
		Workspac	e	Customer Validation	delete					
		Workspac	e	Management Processes	delete					
		Workspac	e	my new	delete					
		Workspac	e	Pay Process	delete					
		Workspac	e	Prospects	delete					
		Workspac	e	Sales Order Processing	delete					
		Workspac	e	Special Inventory Queries	delete					
		Workspac	e	Special KPIs	delete					
		Workspac	e	To-do List	delete					
		Webview	Primary	AR Customer Query	delete	сору				
		Webview	Primary	Main Menu	delete	сору				
		Webview		Inventory Movements - Adjustments	delete	сору				
		AR Custo	mer Query		reset	copy				~

CUSTOMIZING TASK DIALOGS FOR AVANTI

Task dialogs are notification windows that display information and require you to respond by selecting a button or option to continue.

For example:

Save C	hanges	×
	Do you want to save your changes?	I
	Yes No Cancel	J

If you feel that too many notification windows are being displayed, then you can customize these task dialogs to improve throughput, particularly on transactional screens.

These customizations range from removing buttons and changing the default action button, to preventing the dialog from being displayed at all.

Currently, you cannot customize Task Dialogs while in Avanti, as you must use SYSPRO instead. However, any customized Task Dialogs are applied when running in Avanti.

Here's an example of customizing a Task Dialog and its application in Avanti:

After adding an order in the **Sales Order Entry** program (i.e. IMP040) and exiting the application, the program typically shows a Task Dialog that indicates the values of orders taken during the run of the program.

This is what the Task Dialog looks like in Avanti:



And let's now suppose that you don't wish to see this Task Dialog when exiting the application:

- 1. Launch the SYSPRO Windows client version and open the **Customize Task Dialogs** program from the **Administration** tab of the Ribbon Bar.
 - Administration Query ו Design Design UI Layouts 🐴 Design Flow Graphs 👑 Application Builder * 📑 Sea 🛅 Customization Management 🛛 🔄 Customization Tools 🐐 🌇 Eve le Personalization 📑 Design Menus Customize Task Dial Role Management Besign Workspaces 🖓 Trio Customization Favorites Find Clear Favorites Customize Task Dialogs * Customize Close ê Task Dialogs Code Edit customizations System-wide By operator By company Custon Sation Level Х By role Start Customizing ô Cancel System-wide Operator Customization level Company Select operator ADMIN - SYSPRO Administrator Select company 0 - Demo for Phil
- 2. Select the **Customize** option, followed by the **Start Customizing** function:

3. Open the **Sales Order Entry** program (i.e. IMP040) and enter or maintain an order. Then exit the program and the following Task Dialog will appear:

Sales Order Entr	у	×
Order	Entry Totals (in local curre	ency)
New or	ders: \$ 4,905.00 (1)	
New cr	edit notes: \$ 0.00 (0)	
Cancel	ed orders: \$ 0.00 (0)	
Cancel	ed lines: \$ 0.00 (0)	
	Return to Posti	ng Close
Customize this	dialod	
	✓ Do not show this message	
0	Select default button	ip qty
	Select <u>b</u> uttons to show	→
	Rest <u>o</u> re default message setti	ings
	Refresh this <u>m</u> essage	

- 4. Select the Customize this dialog option, followed by Do not show this message.
- 5. Exit the design mode.

That's it. You have changed the behaviour of this Task Dialog so that it will no longer appear either in SYSPRO or in Avanti when you exit out of the Sales Order Entry program.

CURRENT RESTRICTIONS IN AVANTI

ITEMS CURRENTLY NOT SUPPORTED IN AVANTI

The following items are not currently supported in Avanti:

- Structured GL entry.
 Ledger code entries are presented by sections in a drop-down list in SYSPRO but not in Avanti.
- The facility to print list views content is not directly available in Avanti, however you can export to Excel and PDF.
- SYSPRO Customized Panes are partially supported in Avanti.
 (Please read the section <u>Displaying Customized Panes in Avanti</u> for more information)
- Form Actions associated with Forms in SYSPRO are currently not surfaced in the Avanti Visual Designer and therefore cannot be displayed in a web view.

VBSCRIPT FUNCTIONALITY SUPPORT IN AVANTI

Most of the VBScript functionality used within SYSPRO is supported in Avanti, except for the following VBScript form events which will have no effect in Avanti:

- OnBeforeChange
- OnGainFocus

- OnLostFocus
- OnButtonClick

The behavior of list views in Customized Panes differs slightly between SYSPRO and Avanti. Consider the following list view, constructed using a customized pane:

Customer	Name	Selected
000012	QC	

This is a simple editable grid, with 3 columns, and was constructed using the following two properties for the <Columns> element in the VBScript:

```
AutoInsert='true'
AllowDEL='true'
```

These properties mean that you can add rows to the grid, and that you can press the DEL button to delete rows.

In addition, the script for this list view has an **OnDblClick** event.

In Avanti, you cannot press 'DEL' and nor can you execute a 'double-click'. Instead, these button clicks are controlled through buttons added to each row.

And so, this is what this grid looks like in Avanti:

Customized pane: I	Editable Grid				
≡+ G					💷 👱
	Customer	Name	Selected	:	
1	0000012	ABC			*

Selecting the **DELETE** button in the row will execute the **OnDELPressed** VBScript event. Selecting the **ACTION** button will execute the **OnDblClick** VBScript event. And because the property **AutoInsert** is set to 'true', the **ADD** button has been added to the grid toolbar.

DESKTOP ALERTS

Using VBScript, you can create alerts that appear in SYSPRO as popup messages.

The following simple script:

```
dim Popup
Popup = Popup & "<Popup Duration='05' Animation='Fade'>"
Popup = Popup & "<Heading Text='Click to perform an Inventory Receipt'
SYSPROProgram='IMP010' />"
Popup = Popup & "</Popup>"
CustomizedPane.CodeObject.DesktopAlert = Popup
```

... will result in the following desktop alert in SYSPRO:



Selecting the hyperlink will launch the **Inventory Movements** program (i.e. IMP010).

In Avanti, this desktop alert will look like this:



BEHAVIORAL DIFFERENCES BETWEEN AVANTI AND WINDOWS CLIENT VERSION

CUSTOM FORM FIELDS IN AVANTI

Custom fields that have been added to forms in SYSPRO Windows client can be surfaced in Avanti using the **Visual Designer**. By default, the applications that ship with Avanti do not and cannot include any custom form fields as it has no prior knowledge of them.

The same is true for any Customized Panes that have been added to an application. Such panes will need to be added to the web view using the **Visual Designer**.

AUTO-LOADING OF FORM VALUES IN AVANTI

Against certain forms in the SYSPRO Windows Client you can switch on the option to **Load Previous Form Values**. This option indicates that SYSPRO will automatically remember any form options you have changed and reload them next time the program is launched. This only applies to forms that are editable and are appropriate to save their form values – typically when the form values are criteria entries.

In Avanti this is automatically in use.

As an example, any options changed in the criteria for the **Back Order Review** program (i.e. SORP93) as shown below, will be saved and re-applied when the program is next launched.

Back Order Review Criteria					
Start Review				×	9 🌣
Stock codes		^	🕶 Sequence of relea	ise	
Stock code selection	From stock code		Sequence 1	Order number	~
O All		Q	Sequence 2	Order number	•
O Range O Single	To stock code	0	Limit of selected orders	0	
O List		Q			
	List of stock codes <u>Define list</u>		Include/exclude o	ptions	~
			Warn before applying release quantity		
🏦 Warehouses		~	Do not warn before applying alternate		
😕 Customer classes		~	Quantities to be reserved		
Product classes		~	Request lots/bins/serials when reserving		
🧭 Geographic area sel	ection	~			
🛤 Shin dates		~			

USING WEB VIEWS IN WINDOWS CLIENT VERSION

The web views that are used in Avanti can also be used in the Windows client version. However, this is not generally recommended. While technically this would work (apart from some differences noted below), the Avanti web view interface is quite different to that used in the Windows client version and it would be confusing to the user to have some programs displaying the web interface and others using the Windows interface.

Having said this, including a web view that displays Business Insights in some SYSPRO programs might be very useful.

Here's an example of the **Customer Query** program (i.e. ARSPEN) in SYSPRO that includes a web view showing some Business Insights:

ustomer:	0000001	✓ ◀ Prev Q	👫 Fin <u>d</u> 💽 No <u>t</u> es 👻 😂 Co	nt <u>a</u> cts					å.
Custom	er details	^	Multiple address lines	<u>Show</u>	^				П
Custo	mer	0000001	Contact information			Invoice Ageing			xtra
Name		Bayside Bikes	Contact name	Karen Saunders		12,000,000			Cust
Currei	псу	\$ - Local Currency	Email	Accounts@Bayside	Bike:	8,000,000 - 4,000,000 -	Series :	1	ome
On ho	ld		Telephone	206-555-4562			-		Extra Customer Details
Credit	status		Extension	1252		12101° 085 085 085 095	2 ^{69°} 0 ^{69°} 2 ⁵⁰ 0 ^{69°}		ails
Credit	status co	(1	Additional telephone	206-555-4565					
Maste	r sub-acco		Fax	206-555-4587		Average days to	Average YTD		Cus
Over		0.00	Telex			рау	invoice value		Custom Form
Credit		9,999,999,999	4 Documents fax						Forr
		s <u>2 - 60 Days - Net</u>	Number						2
		No credit check	Contact			75	\$ 72	к	A
						Days			dditio
Order		320,149,320.44	Sold to address						onal
	value rele		Building	P O Box 8					Additional Notes
No of	orders	72	Street	Bayside North					ŝ
Last p	ayment	06/06/2018	, City	Seattle	~				S
ows: 10	-	🛅 search text	ي ب						Sales History Graph
nvoice	Type	Invoice da	te Original amo Balan	ce - Local Month po	sted Te	erms Sales orde	r Customer pu	Salesperson	Histo
0466	INV	09/02/2015	448,000.00	447,988.00 12/2015	0	000793	BB801	100	Ž
00476	INV	05/03/2015	914,000.00	914,000.00 01/2016	0	000803	BB 805	100	Fap
00497	INV	01/04/2015	584,800.00	584,800.00 02/2016	0	000815	BB 809	100	-
00509	INV	08/04/2015	2,110.00	2,110.00 02/2016	2	000837	N900101-2004	100	
00510	INV	08/04/2015	784.00	784.00 02/2016	2	000837	N900101-2004	100	
00511	INV	08/04/2015	2,390.10	1,190.10 02/2016	2	000838	N900103-2005	100	
00512	INV	08/04/2015	16,493.75	16,493.75 02/2016	2	000839	N900805-2005	100	
00513	INV	08/04/2015	2,041.20	2,041.20 02/2016	2	000840	N900250-2004	100	
00514	INV	09/04/2015	2,100.00	2,100.00 02/2016	2	000872	567	100	
00531	INV	10/04/2018	22,000.00	22,000.00 02/2016	1		Purchase order	200	

Considerations:

If you do use web views in the Windows client version, there are some differences:

- Predictive search is currently not enabled in toolbars or form fields.
- The search button is not displayed next to toolbar 'key' fields.
- The standard SYSPRO toolbar will be hidden if the web view contains a toolbar. The exception to this is that the Ribbon Bar in the main menu will always be displayed.
- Remember that web views designed for the SYSPRO client will not appear in Avanti. This means you can design web views for SYSPRO that are appropriate for the SYSPRO client interface.

You can implement a web view for SYSPRO programs either by using a standard template (one already built for use with Avanti), or by designing a new web view from scratch. In both cases you would use the **Visual Designer** to accomplish this.

UPGRADING TO SYSPRO 8 FROM SYSPRO 7

If web views were created in SYSPRO 7 then these will be assumed to have been designed for Avanti and will therefore no longer appear in the SYSPRO Client.

If you wish any existing customized web views to appear in the SYSPRO Client, please read the section Save as a different web view.

Prior to **SYSPRO 8 2019 R1**, any customized web view by operator or by role would have been assumed to be surfaced in both SYSPRO itself and in Avanti.

In later releases this is not the case and any such pre-existing web views will be assumed to be for Avanti only, as you must now explicitly state if a web view is targeted for SYSPRO or for Avanti.

Therefore, if you have created web views for prior versions of SYSPRO and wish them to appear in SYSPRO in future, you will have to either rename the JSON file, or use the '**Save as...**' option in the **Visual Designer** (please read the section <u>Save as a different web view</u>).

To rename an existing web view JSON extension residing in your ...\Base\Settings folder or in a Role_xxx folder, you should add the _syspro extension.

Example: If you have a web view in ...\Base\Settings (by operator) for the Customer Query application and you want the web view to continue being surfaced in SYSPRO, then the filename should be: UX_operator_ARSPENLZ_SYSPRO.JSON.

USING MSGBOX AND INPUTBOX FUNCTIONS IN A VBSCRIPT IN AVANTI

Any **MSGBOX** and **INPUTBOX** functions in a VBScript will execute within the SYSPRO system on the application server. When running in Avanti, such functions would cause Avanti to appear unresponsive as user action is required. To overcome this problem these VBScript functions are converted just before a script is to be executed so that the MSGBOX function calls a SYSMSG function, and INPUTBOX calls a SYSINPUT function.

SYSMSG and SYSINPUT are functions that convert a MSGBOX or INPUTBOX statement into an equivalent JSON Task Dialog format suitable for executing in Avanti.

Thus, a MSGBOX in SYSPRO that looks like this:

Invalid Customer		×
The customer you have	entered is incorrect. Do you wish to continue?	
	<u>Y</u> es <u>N</u> o	

... will appear like this in Avanti:



Similarly, an INPUTBOX in SYSPRO that looks like this:

^
ОК
Cancel

... will appear like this in Avanti:

/ name	^
Enter your name	
ок	Cancel

In addition, the **Timeout** value for a script will be set as **-1**, indicating no timeouts will occur.

Again, this is to prevent the system from appearing to be unresponsive if a timeout message were to be displayed.

ARCHITECTURE

Avanti is built using modern web technologies and has the following characteristics:

• Avanti is a single-page application (SPA)

This allows Avanti to provide an experience akin to a native application on either a mobile device or a desktop browser. Avanti improves performance because only data is transmitted to the browser, which takes less time and bandwidth than constantly sending fully constructed HTML pages.

• Avanti is a responsive web application

The design of the UI is fluid, meaning the web page content automatically fits into the available screen size, whether you are using a desktop browser or a smartphone. In short, Avanti ensures that it is effective and easy to use on any device.

The purpose of this section is to provide a high-level technical overview of the SYSPRO Avanti Architecture. It details the different deployment tiers as well as the technologies used by Avanti along with the key benefits.

The technologies discussed will be both from an on-premise and cloud deployment perspective.

HOW AVANTI WORKS

The following process/workflow describes how Avanti authenticates, as well as how information is passed from one tier of the architecture to the other:

- 1. A user will access Avanti through a web browser using an address specifically setup by the SYSPRO administrator for the installation of SYSPRO.
- 2. Once the address of the Avanti website is entered in the browser, a logon screen will be displayed, allowing the user to capture their username, password and company details.
- 3. When the logon button is clicked, a request is sent to the Avanti Website, which in turn sends a request to the **Avanti Initialization Service** for the credentials to be validated. The initialization service does not have any authentication built into it as it relies on the "standard" authentication model of core SYSPRO.
- 4. Once authenticated, there will be no further workloads for the Initialization service until another user logs on. From there on in the SYSPRO executable will respond to any requests made by the web browser.
- 5. All requests and responses made from web browser will be routed to the Avanti website, then relayed to the SYSPRO App server, then back to the Avanti website and finally back to the browser.

SYSPRO AVANTI ARCHITECTURE DIAGRAM



The above diagram illustrates the 3 different tiers.

TIER 3 – CLIENT (THE BROWSER)

The client tier is the initial touch point for any users wanting to make use of SYSPRO Avanti.

Using a web browser that supports HTML 5, a user can browse to the website where Avanti has been installed. All UI (User Interface) elements in Avanti have been built using modern web based technologies such as <u>HTML 5</u>, <u>JavaScript</u> and <u>CSS3</u>.

Avanti has been developed from the ground up to adhere to <u>responsive web designs</u>. This enables Avanti to run on any device and any platform, regardless of form or size factor. As the size of the device or web browser increases or decreases, Avanti will automatically adjust itself to best suit its environment.

Avanti has also followed the <u>SPA (Single Page Application)</u> design philosophy. This allows data to be dynamically bound to a page instead of the page being regenerated all the time, thus saving time, bandwidth and increasing the overall performance. This modern design also avoids disruption in the users experience within the application.

SYSPRO Avanti is delivered via a web browser and requires no pre-requisites or software to be installed on the user's machine, making Avanti have a zero footprint on the client.

TIER 2 – AVANTI WEBSITE\SERVER

Tier 2 (the Avanti Website) is the tier that handles the requests/responses from the web browser to the SYSPRO Application Server. This tier can be installed on a traditional Windows Server running IIS (Internet Information Services) and has been purposefully built to run in the cloud but can run on premise just as effectively.

The Avanti Website can be secured by the administrator using **SSL**. The data in transit from the Website to the web browser and vice versa is compressed by the Avanti infrastructure and provides compression levels of up to 95%, thus adding to the overall performance of Avanti.

A web technology called <u>WebSockets</u> in conjunction with **Signal R**, allows for robust communication between the Avanti Website and the web browser. With this technology, SYSPRO Avanti can reconnect to the SYSPRO App Server and web browsers when there is a drop-in network connectivity, once again adding to the reliability of SYSPRO Avanti.

When running Avanti on-premise, it has been optimized to have an auto update setting. This allows any new Avanti features that was released on a SYSPRO port to be updated on the Avanti Website automatically, without the need of the administrator.

TIER 1 – SYSPRO APP SERVER

There has been an introduction for an Avanti Initialization Service, this service's sole responsibility is to do a handshake between the SYSPRO executable and the Website for each user that has logged on.

A few new tables have been also included to the SYSPRO SQL Server company wide database which is used to maintain state for the users utilizing Avanti.

SYSPRO AVANTI DEVELOPMENT

The **SYSPRO Avanti Software Development Kit** lets developers create their own applications that connect to Avanti.

A **Microsoft Visual Studio** extension (included in the SDK) provides templates for new projects (and controls used within those projects) together with several development productivity features. In addition, the extension allows for debugging of Avanti plugins and supports the creation of bespoke cards.

The **SYSPRO Avanti Software Development Kit** supports a variety of use cases, from basic customization and scripting in Avanti, to entire embedded applications in the Avanti infrastructure.

You can still use VBScript customization for simple user interface customization and automation, but for more complex scenarios the **SYSPRO Avanti Software Development Kit** provides a powerful solution.

The benefits of this SDK over VBScript customization include:

- Improved performance
- Full development environment of **Microsoft Visual Studio** with productivity extension
- Intellisense and code completion
- Live debugging of code with breakpoints
- Access to the entire Avanti API

Note: Resources will be made available on the SYSPRO Learning Channel.

FAQs

SMARTLINKS

HOW DO SMARTLINKS WORK IN AVANTI?

SmartLinks work slightly differently in Avanti versus the SYSPRO Windows Client version, as the following program types are ignored within the **SmartLink** menu in Avanti:

- Items that launch executables
 This includes custom client-side programs.
- Items defined as 'browse-style' There are no 'browse' programs in Avanti.
- Items for Multimedia
 The Admin Multimedia program (i.e. IMPMCI) doesn't work in Avanti.
- Items for SRS programs

This explains why you don't see the same set of SmartLink menu items in Avanti as in the SYSPRO Windows Client version.

Note: The **Customize Hyperlinks and Exceptions** program (i.e. IMPFR1) has been updated to ensure that the SmartLinks not applicable are not displayed in Avanti.

Take for example the **Customer** SmartLink in Avanti, which can be found in the **Inventory Query** program (i.e. INVPEN) on the **Movement** tab/screen. Only a few options are displayed:

Stock code A100	<u></u> ૧						
A100 - testing Benita				*		nits of measu	
				Movements	;		
B - Bought out		MB - Mountain I	Bicycles 🔻	生 More lir	nes Viewjour	nals \Xi 🛙	
Part category		Product class		Date	Customer	Type	٦
. •		JD - Jenny Davi	s 💌	2009/03/15		Inv	
Planner		Buyer		2009/03/18	0000000	Colo	
				2009/03/20	000 🔳 Cu:	stomer card	- [
Pricing				2009/04/19	000 Query		
- Hong				2009/04/26	000 Custome	arsatun	- 1
\$560.000	\$350.000		37.500%	2009/04/26	0000004	Sale	_
Selling price	Cost price		GP %	2009/04/29		Inv	
				2009/05/17		Inv	
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When compared with the SmartLink menu options in the SYSPRO Windows Client version, you will notice that more options are available than in Avanti:

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AFRICA

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

SYSPRO South Africa

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

SYSPRO South Africa

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

SYSPRO East Africa

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

ASIA-PACIFIC

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

SYSPRO Australia

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

SYSPRO Asia

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

CANADA

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

SYSPRO Canada

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

SYSPRO Canada

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

EUROPE

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

USA

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

www.syspro.com

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