Enhancements

SYSPRO 7 Update 1 | Port 023

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Port 023

The following is a summary of the enhancements that have been implemented for this port.

Customize Task Dialogs

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to manage the display of system notification windows that require your response to continue (e.g. making a selection at a YES | NO | CANCEL button)

Being able to customize these task dialogs can be useful if you want to improve throughput, particularly on transactional screens.

What was done?

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

Task dialogs with only a single button are presented as **auto-expiring** messages (i.e. toast notifications). These notifications are displayed briefly on the screen to alert you to a condition, before disappearing automatically without requiring any further input.

If the message contains a colon character (**:**) it is treated as a data notification and the message is displayed in the main ribbon bar under the **Notification** icon. You can view the last 20 notifications.

Switch on Task Dialog customization

1. Load the **System-wide Personalization** program (**SYSPRO Ribbon bar** > **Administration** > **System-wide Personalization**).
2. Switch on the **Enable Task Dialog customization** option.
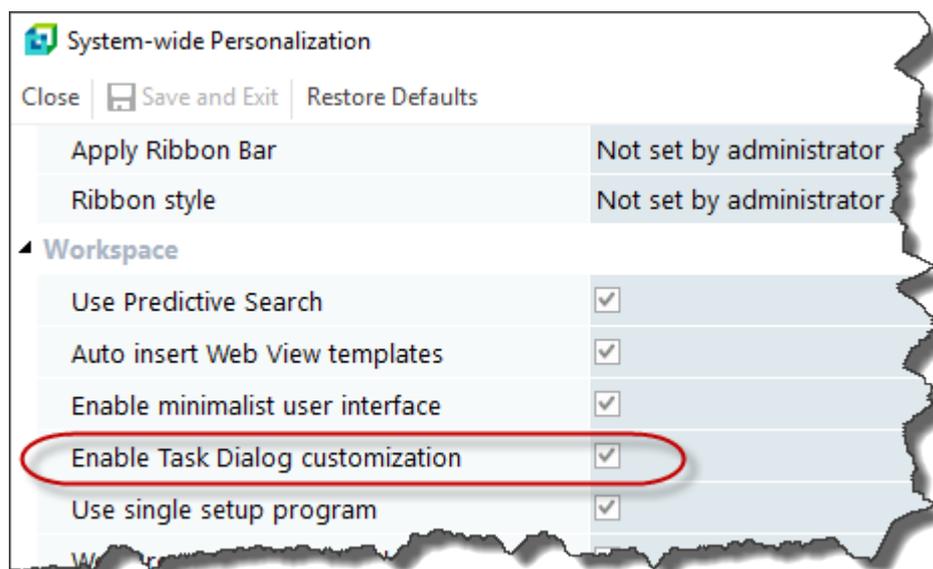
When next you login to SYSPRO, the **Customize Task Dialogs** option on the **Administration** tab of the ribbon bar is enabled.
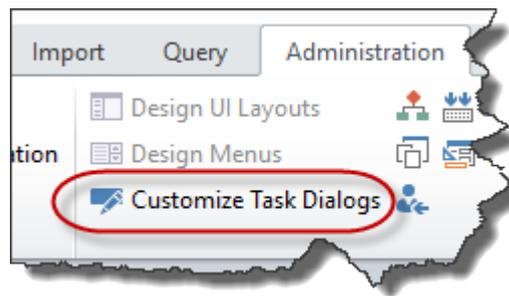
Customize Task Dialogs

1. Select the **Customize Task Dialogs** option (**SYSPRO Ribbon bar** > **Administration** > **Customize Task Dialogs**)
2. Select **Customize** from the toolbar and indicate the level of customization required.
3. Select **Start Customization** from the **Customization Level** toolbar.

   A dialog is displayed indicating that you are now in design mode.

   From this point (until you exit design mode) any task dialogs displayed will include a **Customize this dialog** hyperlink. When selected, a submenu is displayed with a number of options:

Option	Description
Do not show this message	This suppresses the message from being shown.
	Since the task dialog will not be displayed again, you can only modify or reinstate the default settings by loading the **Customize Task Dialogs** program and reviewing your task dialog customizations.
	It is also important that you set the appropriate default button or option to be actioned when suppressing the message dialog (e.g. setting OK as the default button when adding an order line will always add the line).
Select default button	This lets you choose which button or option must be treated as the default (i.e. pressing RETURN will action the default button).
Select buttons to show	This lets you choose the buttons or options you want to display (e.g. you want to hide an option that you don't want the operator to action).
Restore default message settings	This removes any customization you have applied to the task dialog.
Refresh this message	This lets you preview the selections you made for the dialog.

4. Select the **Exit Design Mode** function when you have finished customizing task dialogs.

   If a task dialog has been customized, then the caption `* Customized Task Dialog` will be shown in the footer text when running SYSPRO.

   The system saves your customization changes automatically as you select any of the customization options. The changes are saved in text files on the server and the system checks these files to determine if a task dialog has been customized.

   Each task dialog customization is uniquely identified by the context of the program that caused the message box to appear and the Window title, Instruction text and Content text.

   Customized Task Dialogs are saved to the following locations:

Level	Folder & filename
System-wide	`\Settings\TaskDialog_SystemWide.txt`
By role	`\Settings\Role_xxx\TaskDialog.txt` The role file is only processed if you are logged in as a role.
By company	`\Settings\TaskDialog_Company_companyID.txt`
By operator	`\Settings\TaskDialog_Operator_operatorID.txt`

Where can I see the change?

Program	Description	Version
IMPMEN	**Main SYSPRO Menu**	186

Balance function separated from Period end processing

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to speed up **Period end** processing by allowing you to optionally choose whether to run a **Balance** function for month end and year end routines in the General Ledger, Cash Book and Asset Register modules.

What was done?

The **Balance** functions in the General Ledger, Cash Book and Asset Register modules have been created as separate business objects and are not run automatically when performing a month or year end.

There is a new **Include balance function** option that you can optionally select when you run a function that includes a month end or year end.

A **Last date balance was run** field has also been added to the **Control details** section of the programs. A warning is displayed if you run a month end or year end routine and a balance function has not yet been run for the date reflected in this field. This message is not displayed for programs against which automation design has been applied.

Where can I see the change?

Program	Description	Version
ASSP01	**Asset Period End**	036
ASST01	Asset Balance Function	001
CSHP01	**Cash Book Period End**	035
CSHT01	Cash Book Balance Function	000
GENP01	**GL Period End**	054
GENT01	GL Balance Function	000

New Xpress Cart app added to Espresso

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to extend the sales order experience directly to customers in terms of flexibility, efficiency, ease and speed of capturing orders online. It mimics a shopping cart and can be customized according to your preferences (e.g. grid vs card view) and by adding images of your stock items.

What was done?

The Xpress Cart can be used to conduct direct comparisons, where differences are highlighted in red. Stock codes can be categorized into buckets based on various criteria (e.g. unit of measure, product class or product group). For example, bicycle accessories can be categorized together. However, only one category (not multiple) can be specified at a time, with its relevant subdivisions. This new application provides mobility on the road, should improve the customer ordering experience and was designed to solve a problem in the market.

Where can I see the change?

File	Version
SYSPRO.SOR.QUICKENTRY.ESPRESSO.DLL	000
SYSPRO.SOR.STANDARD.ESPRESSO.DLL	016

Filtering available for journal and distribution reports

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to allow filtering options, regardless of whether you are printing or reprinting journal or distribution reports. Previously, you could only select filtering options when *reprinting* journals and distribution reports.

What was done?

The **Print** and **Reprint** options have been removed from the **GRN Distribution Query** and **WIP Labor Distribution Query** programs (i.e. you will always be able to select ranges of items to print).

Where can I see the change?

Program	Description	Version
INVQ81	**GRN Distribution Query**	007
WIPQ51	**WIP Labor Distribution Query**	011

File	Version
GRN_GL_DISTRIBUTION	002
WIP_GL_LABOR_DISTRIBUTION	002

Retain original AR and AP exchange rate (in progress)

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to store the original exchange rate used when processing invoices. Currently, the exchange rate is overwritten when an Accounts Receivable or Accounts Payable invoice is revalued, which made reconciliation very difficult.

What was done?

An original exchange rate has been added to the AR and AP invoice tables. These exchange rates are not overwritten during the revaluation process.

This project is still in progress and will be completed over subsequent ports.

Where can I see the change?

Program	Description	Version
APSP09	**AP Post Permanent Entries**	017
APSP82	**AP Manual Check Entry**	021
APSP90	**AP Initial Invoice Capture**	014
APSP93	**AP Void Checks**	021
APSSII	**AP Initial Invoice Capture**	006
ARSP52	**AR Post Permanent Entries**	026
ARSP80	**AR Finance Charge Calculation**	024
ARSP90	**AR Initial Invoice Capture**	021
ARSPCS	**AR Customer Maintenance**	070
ARSPE6	**AR Master Sub-accounts**	029
ARSSII	**AR Initial Invoice Capture**	004
ARSTIN	**AR Invoice Posting**	028
ARSTPY	**AR Payments and Adjustments**	056
IMP041	**Document Print**	205
IMP04G	**SO Counter Sales**	083
SORQND	**SO Dispatch Invoice Document Query**	029

Business objects optimized for SQL

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to improve the performance of business objects when using a SQL database.

The business objects have been changed to use SQL-optimized code to retrieve data from a SQL company.

Where can I see the change?

Schemas and sample XML instances are available in the SYSPRO e.net Solutions Business Objects Reference Library.

Program	Description	Version
BOMQRO	**BOM Routing Query**	004
PORPRQ	**Requisition Query**	030
PORQRQ	**PO Requisition Query**	020

New object to query tracking of goods in transit

Version	Issue	Port
7.0	001_SP1	023

What was done?

A new business object was created to enable e.net Solutions developers to develop applications to query the tracking of goods in transit from the source warehouse, in transit and target warehouse.

Where can I see the change?

Program	Description	Version
INVQG9	Goods In Transit Query	000

New WIP Tracking Query object

Version	Issue	Port
7.0	001_SP1	023

Why was this done?

There was a requirement to be able to calculate the WIP variance of a job per material allocation and operation, enabling the total variance to be calculated.

What was done?

A new business object was created to calculate the WIP variance of a job per material allocation and operation. The total variance is then calculated (i.e. the value issued less the expected cost) and then the variance for the material allocations and operations for a job are added together.

The business object can calculate the total for a job, the summary (summary of the material allocation and operations) or detail information for each material allocation and operation.

- If the costing method is BOM Cost and the allocations are only added after a job has been created for the main item (i.e. no BOM structure) then the unit cost for the material allocation may be incorrect.
- Variances for material allocations and operations are calculated per line and then added to give the final variance for the job.

   If an operation is complete but the material allocation is not, then the variance is calculated for the material as well. If only the material allocation is complete, then only this variance is calculated.

Where can I see the change?

Program	Description	Version
WIPQVA	**WIP Tracking Query**	000

Predictive Search improvements

Version	Issue	Port
7.0	001_SP1	023

What was done?

You can now decide whether the search for a given key field is enabled for a toolbar, a form or a data grid. Previously, you could only stop predictive search for a key field, which would apply to all toolbars, forms and data grids.

Selections made regarding options (including any filter options) are now saved in the operator's preference file (operator.PRF) on the server.

If you stop using predictive search for a key field, then it can be re-enabled by clicking on the **Settings** icon on the main ribbon bar and selecting **Use Predictive Search for**. A list of key fields that have been stopped is displayed and you can click on the key field you want to re-enable.

Where can I see the change?

Program	Description	Version
IMPFRO	**Display/Entry/Custom Forms**	204
IMPMEN	**Main SYSPRO Menu**	186

File	Version
CUSTOMIZ.WRK	

Additional updates

The following additional updates were made to the software.

Web Views

Web Views were released in Port 021 as part of SYSPRO's ongoing process of modernising its user interface and improving the user experience of its applications.

The wording of the option to switch on Web Views has been changed to **Auto insert Web View templates**.

In addition, when a row is selected in a listview, then any pinned Cards are refreshed automatically if the Card's key field is in the listview. Previously, you had to click within a listview cell to refresh the pinned Card.

Minimalist user interface

The option to enable a minimalist user interface was added to the **System Setup** program in Port 021. The option applies a minimalist theme (Office 2013) to the SYSPRO interface to give it an uncluttered feel.

When first released, only when switching this feature on was the ⚙ icon activated. This has been changed to always be available, regardless of whether the minimalist user interface option was enabled.

SYSPRO Workflow Services install

There is a new SYSPRO Workflow Services install file (64-bit). The service was changed to address a licensing issue that arose when retiring a workflow with Workflow Professional licensed and no limit on the number of workflows licensed.

You must uninstall the old service before reinstalling the new one.

Appendix

Additional resources

Reference Guides

SYSPRO's Reference Guides are primarily module-based and cover aspects of the user interface at program level. This includes detailed field and function explanations as well as notes and warnings regarding the usage of an application program within SYSPRO. These guides also extend to feature topics within the system (e.g. Tax, Security, Language Translation, etc.) and include implementation considerations. Please refer to the SYSPRO *InfoZone* for details on how to obtain these guides (`http://infozone.syspro.com/support`).

Support

SYSPRO's *InfoZone* provides up-to-date information about the product as well as more advanced tutorials for registered users.

Newsletter

As part of SYSPRO's ongoing commitment to keeping you informed about the latest product developments, a regular newsletter is distributed to the SYSPRO community. The newsletter covers many aspects of SYSPRO ranging from product enhancements to support-related information, known issues and useful tips. You can subscribe to this newsletter from the SYSPRO *InfoZone*.

Forums

SYSPRO provides a number of active on-line *forums* for you to engage in various discussions about the product.

Contact us

The Technical Authoring team comprises: Even Nesset, Carol Hart and Monique MacNaught. Send us your comments to help us improve the standard of our reference guides.

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