VERSION 6.1

SYSPRO
Simplifying your Success

New Features Summary Guide

Technical Writing

SYSPRO (Pty) Ltd

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PREFACE

ABOUT THIS GUIDE

This guide provides a summary of the main features included in SYSPRO 6.1.

Every effort is made to provide you with the most up-to-date information possible. However, the constant development of the product means that the information in this guide may not always match your version of the software.

Although this guide can be used in conjunction with SYSPRO's training material, it is not a training guide. Training guides are available from SYSPRO. Please consult your local SYSPRO office for details on how to obtain these guides.

Power Tailoring

The fluid user interface that has resulted from SYSPRO's use of Microsoft Office's component technology provides a familiar and standard interface for users. Centralized administration of the interface facilitates simplified, efficient administration of tailoring at system, company, role and user level. System-wide personalization streamlines the implementation of company-specific standards, such as the rewording of default field captions to align with company terminology, while role and user-based personalization simplifies the modification of user interface elements, such as menus, toolbars and forms.

Powerful form-tailoring capability provides control over the appearance and behavior of display and entry forms without the need for specialist development skills. For example: You can configure forms to display additional data automatically, such as CAD drawings associated with stock codes; insert an editable or read-only notepad against any key field; remove any fields you do not use; and control and streamline the way data is entered, through configurable input masks and case settings.

Capabilities for quick analysis are provided in data listviews: Excel-style filtering of columns enables you to rapidly identify unique values; auto-summing features provide column totals, averages and counts; and conditional formatting enables the rapid extraction of the top, or bottom 10 values. Also, listview templates enable the inclusion of in-line graphics for each listview transaction (e.g. actual-versus-expected costs per job number, or actual-versus-expected sales per product). Furthermore, you can paste data cut from an external application (such as Excel) directly into a SYSPRO data grid (such as the general ledger journal).

SYSPRO 6.1 customization allows you to modify the behavior of any SYSPRO application and to add business functionality without requiring development skills. The end result is a fully-personalized system designed to adapt and change as requirements evolve. These changes are not affected by software upgrades and do not compromise the underlying security or business logic.

SYSPRO 6.1 also allows you to present any information (right down to cell level) in a graphical and aesthetically-pleasing approach using a combination of Excel-style features and XAML Markup code.

Administrators can additionally use sophisticated development tools such as Visual Studio to build and deploy .NET applications that interact with core SYSPRO applications and are implemented as a seamless part of the SYSPRO applications. Once these .NET applications reside on a central server they can be deployed to the client computer automatically as required.

TOOLBARS AND MENUS

Menus and toolbars have been re-engineered to use the latest techniques and have the look-and-feel of a modern toolbar that functions exactly like Microsoft products.

You will be able to fully customize toolbars and menus in SYSPRO applications (e.g. remove or add buttons and commands to any toolbar or menu) and save this customization at operator role level. This enables administrators to remove (or add) functionality from any application and ensure that the changes target a specific group of operators.

An operator personalization option allows you to display all toolbars as a ribbon bar *Menu bar > Home or Options > Personalize > Environment Options > Show Ribbon bar*. The functionality is the same, but is more intuitive to use.

You can customize the standard toolbars against the SYSPRO main menu as well as against all programs. This customization ranges from simply changing the text against toolbar items, icons and shortcut keys, to changing the function they perform. You can add new items to existing toolbars, as well as new toolbars.

This customization (allowed by default) can be performed at operator or operator role level and is controlled by setting an operator security activity. At role level, the customization can only be performed in Design Role Layout mode.

A toolbar tear-off option enables you to drag a toolbar to be a floating toolbar on top of the application. The toolbar disappears when the application is closed. The next time you run the application, the floating toolbar appears in the last location that the application was run.

You can revert to the standard toolbar settings using the *Reset Toolbar Settings* function *Menu bar > Home or Options > Personalize > Toolbars > Reset Toolbar Settings*.

FORMS

Forms, used for both display and entry throughout SYSPRO applications, allow for easier and more sophisticated customization. You will be able to add or remove functionality from forms without requiring any development tools or VBScripting.

Highlights include:

- Form actions
- Associated panes
- Field-level help and multimedia
- Field customization

ACTIONS

Form Actions enable you to run a SYSPRO program or VBScript from a hyperlink. The hyperlink appears at the bottom of the form in an area called the *Action Panel*.

ASSOCIATED PANES

Associated panes allow you to insert panes containing relevant information directly into any application.

For example, you may have an application for which you would like to view the customer invoices when you enter a customer number. Although this level of functionality has been available since the introduction of customized panes in SP2, it is now a simple matter of right-clicking a field on a form and selecting the appropriate built-in associated component to instantly change the application.

You can also create your own associated panes which you can then make available to your users as required.

SELECTED FROM THE CONTEXT-SENSITIVE MENU

When you right-click on a key field within a form, the context-sensitive menu that is displayed includes the option: *Insert Associated Pane*. Selecting this option displays a list of associated panes that is available for the field. Selecting one of the associated panes adds a customized pane to the program. The title of the pane is derived from the wording displayed on the list.

If the key field on the associated pane is already populated with a value, then the associated pane is populated with data. Otherwise the associated pane is displayed without data until the next time the key field contains a value.

The key field does not need to be the primary field for the program (e.g. there are many key fields available in the Inventory Query to which associated panes are linked, not just the stock code field).

NO ADDITIONAL CODING REQUIRED

An associated pane that is inserted into a program already contains the coding required for it to work. Unlike a customized pane, it does not require additional coding to refresh data.

REFRESHING VALUES

An associated pane is linked to a key field, and the associated pane refreshes when the field changes. If the key field is not the primary field for the program, then the field may not be refreshed when the primary field is changed. In this case, the associated pane does refresh, avoiding the need to run the business object on which the associated pane relies.

For example: Although the stock code is the primary field in the **Inventory Query** program, you can insert an associated pane that is linked to the supplier field on the *Distribution* pane. When you change stock codes in the query, the supplier may be the same for the new stock code, in which case the associated pane is not refreshed as the data is already displayed for this supplier.

COMMON FIELDS DISPLAYED BY DEFAULT

The associated panes' listviews are based on SYSPRO e.net solutions business objects. The volume of information available depends on what is returned by the business object. Some return one or two fields for each line, while others return thirty or more. It was decided that the most likely requirement was to be able to view up to nine columns by default and to hide the remaining columns.

Note:

All the hidden fields are still included in the associated pane coding. You can view these fields using the *Field Chooser* for the associated pane and, if required, drag them onto the listview's column header. Like any other listview, you can also drag columns off the listview if they are not required. These column headers also appear in the *Field Chooser* and can be reinstated, if required.

ADMINISTRATORS CAN CREATE OWN PANES

The list of available associated panes for each key field is held in a text file called IMPVBC.IMP. Administrators can create a file called CUSVBC.IMP to contain links to associated panes that they have created. These will appear immediately below the standard associated panes when the list is displayed.

CUSTOMIZED PANES

FORM STYLE ENTRY

The customized pane editor screen has been changed to a form style. Given the increased volume of new options for a customized pane, this makes it easier to add/maintain customized pane information.

TOOLBAR CONTROLS

Two toolbar controls allow interaction with the customized pane. Each toolbar control can be an entry field, a checkbox, or a button, with its own description and icon.

For a checkbox or entry field toolbar control, the current value associated with the toolbar control is available to the underlying VBScript via a variable when the refresh button is selected, or the customized pane is refreshed from another form.

An example of where the checkbox could be used is in a listview containing all warehouse quantities for a stock code. The VBScript could be written so that if the checkbox was selected, only the values for the *Warehouse to use* for this stock code would be displayed and, if not selected, all warehouses would be displayed.

An example of where the entry field could be used is if they were a value in the entry field, only warehouses matching this value would be displayed, else all warehouses would be displayed.

A button toolbar control is associated with a button clicked event. This event can have VBScript against it, which means that when the button is clicked the VBScript is run, and variables are available for all fields that appear in this program.

IMPROVED WEB BROWSER CONTROL

The Web Browser customized pane is used to display a web page. Previously this could only point to an existing web page and, using VBScript, you could point it to a different existing web page.

This has been enhanced so that you can dynamically build the HTML for the web page and pass this to the browser to be displayed.

ADDITIONAL REFRESH OPTIONS

Typically, a customized pane needs to receive a *Refresh* event to re-display data. This can be sent programmatically from another form in the same program, or by clicking the form's own *Refresh* button. From another form in the same program you could either refresh the customized pane (and pass it a value at the same time) or set focus on the customized pane.

Although previous version of SYSPRO would not allow you to perform both tasks, SYSPRO 6.1 allows you to refresh a customized pane and set focus on it at the same time. You can also hide/show the customized pane. When hidden, the pane appears as a tab and the pane expands when a mouse pointer hovers over it.

IMPORTING AND EXPORTING

Within a program that has associated customized panes, you can export the customized pane to a file. This exports all the customized panes. When importing customized panes from an export file, all customized panes in this file are imported.

When exporting customized panes in SYSPRO 6.1, a window is displayed containing a list of all the customized panes against the program. You can selectively indicate which panes to export by enabling the checkbox against each item you want to export. All items are enabled by default. In addition, you can enable the email option to export the file as an email attachment.

Similarly, when importing customized panes from an export file, a list of the customized panes contained in the import file is displayed. You can selectively indicate which panes must be imported by enabling the checkbox against each item required.

NOTEPAD

A Notepad customized pane facilitates the display of text from a Rich Text Format (RTF) file, or from a stream of RTF text. The stream of RTF could come from the business object COMNOT and any changes could be written back using the business object COMSNO.

You can change the name of the RTF filename displayed depending on information held against the master item being displayed/used.

FIELD CUSTOMIZATION

Fields can be enhanced using fonts, colors, or built-in themes (themes allow you to use markup code to describe exactly how a caption must appear).

You can specify that key fields (e.g. stock code, customer, job number) must be converted to UPPERCASE as they are entered into the form. This ensures that key fields are entered correctly by the operator. This functionality applies equally to the entry of fields in toolbars and list views.

You can use a form's mini toolbar (displayed by simply double-clicking any form caption) to make quick changes to the appearance of the form and you will be able to use the **Properties** window to modify the look and behavior of the form.

FIELD-LEVEL HELP AND MULTIMEDIA

You can define your own field-level help so that new operators are able to immediately grasp the purpose of fields (e.g. custom forms) as they appear on a form. You can also insert Application Help directly into any application which means that instead of having to press F1 to see the application help, it can now be viewed as an integral part of your current application.

You can insert any multimedia object directly into a form (e.g. images of stock code drawings that you would like to see in an application.

SKINS

Pre-defined or user-defined skins can be used to change the overall look of the SYSPRO product. This can also be applied at company level.

LISTVIEWS

There are a number of options that can be defined against a listview and against individual columns within a listview:

Option	Description
FreezeColumn	This enables you to specify that a number of columns on the left of the listview remain stationary when the operator scrolls to the right.
AutoSize	This enables you to specify that the columns of a listview must all remain within the width of the customized pane, or that a scrollbar will appear against the customized pane if the size of all the columns warrants it.
Hidden	This enables you to specify whether individual columns should be displayed or hidden.
GroupBy	The enables you to specify that a column must default to being grouped (i.e. all items in the column of a like-value appear together, with a sub-heading). You can specify that a column must be sorted in ascending or descending sequence.

Option	Description
Footer	The enables you to specify text that must appear at the bottom of a column which can include keywords to display items such as the number of rows in the column.
Decimal places	You can specify that the data type of a column is date or numeric. This enables you to specify (for numeric columns) the number of decimal places to display. Unless specified, a column's data type is usually determined by the value in the first row.

XAML

XAML (eXtensible Application Markup Language) is a scripting language that is used to display information, and which can be used to draw shapes, graphs and embed data. Several XAML templates are provided with SYSPRO. These templates accept multiple values (delimited by pipe signs) and use these values to populate graphs, charts or simple multi-line displays. This enables you to have multiple values in a cell. Previously, a listview cell could normally only contain one value.

For example: The **Inventory Query** *Movements* listview has a large number of columns that can be viewed. Instead of having to scroll backwards and forwards to see all the values, you could use one of the XAML templates (which allow the display of multiple fields) and assign it to several of the columns. If one was assigned to the *Customer* column, you could pass through the customer code, customer name and customer purchase order number, and these would appear in the same cell, one below the other.

Another example would be the *Warehouse History* listview that contains sales/issues for the current month, as well as the last 12 months. Instead of viewing all these absolute values in separate columns across the screen, they could all appear in a graph in one cell. This is done by assigning a XAML graph template to one of the columns; accumulating the values from the required columns; and putting them in to a string with a pipe sign between them.

VBScripting

A sophisticated syntax editor for the VBScript IDE is provided as well as more advanced ways to create list views and forms in customized panes. A new notepad object for customized panes allows you to add a notepad to any application and for any key field.

The new VBScript editor control includes a number of new facilities, including:

- a line count facility that makes it easier to debug coding;
- a zoom facility to quickly set the displayed font size;
- a print preview; and
- Intellisense for VBScript commands.

Field attributes are displayed in a docking pane instead of a dialog box. This allows you to display it permanently on the screen, ready for use.

When scripting against a listview you can specify a XAML template to use. The XAML template enables the display of multiple pieces of data in the same listview cell. Depending on the template used, it will either display the data in a different format, or the representation of this data, such as in a graph.

A number of new system variables are available for use in the VBScripting environment. These include:

- base folder name
- user number
- current operator
- role number/title
- SQL database name
- SYSPRO instance

The SYSPROBrowseToRun variable is similar to SYSPROProgramToRun except that if an item is selected in the browse, the value is returned to the current program and is used to populate the current field.

Standard field names (and those specified in customized panes) that clash with VBScript reserved words will automatically appear in the list of variables suffixed by a capital letter A.

Centralized Administration

SYSPRO is becoming increasingly sophisticated in terms of flexible setup and security options. SYSPRO 6.1 allows users to configure these security options and all customization of the user interface at role level. A centralized administration application manages all the security and a centralized tool manages all the user interface changes.

ROLE-BASED SECURITY

This is an optional security feature that consolidates existing security facilities within SYSPRO, allowing them to be configured by role. Enabling an administrator to assign an operator to a role provides a much simpler mechanism when managing security - especially for a larger number of operators and when new operators join an organization.

A **Role Management** program allows you to configure:

- Activities (also known as operator activities)
- Fields (also known as operator fields)
- Access (also known as operator access control - such as warehouse, branch, bank, job class, account and contact)
- Programs (also known as group access control by program)
- eSignatures

Import and export capabilities allow the configuration on one system to be used at another system. When configuring the role-based security, you can use existing configurations by operator/group, etc., to make the initial setup easier.

ESIGNATURE VBSCRIPT TRIGGER

The eSignature System has been enhanced to enable you to configure and invoke a VBScript when a trigger is fired. This caters for almost unlimited triggering capability since virtually any type of application can be invoked using VBScripts, including SYSPRO e.net Business Objects.

The VBScript can use a number of common system variables (i.e. company, operator, date, transaction id) as well as transaction-specific parameters (e.g. stock code, warehouse, quantity).

SRS DOCUMENT ADMINISTRATION

You will be able to:

- archive created documents;
- retrieve (and optionally print) archived documents, including the capability of searching for historical documents;
- import and export documents in a way that all settings and files are accessible to the customer;
- print a document to more than one device;
- create and maintain document types, document templates and sample document templates;
- set all new properties against documents in a style consistent with the product; and
- delete existing unused document template files.

Enterprise Performance Management

Today's organizations need access to immediate, accurate information, as a base on which to make informed decisions, and to see how the organization is performing against corporate goals.

In many cases, organizations have found it difficult to synchronize business strategy with operational execution because they lack visibility into the information needed to support decision-making. Often, organizations are using disconnected applications (for example, Excel spreadsheets) to record and analyze data, or managers have to wait for another department to complete some work before getting information.

In order to reach the following important goals of:

- real-time access to operational information;
- data-driven decision making; and
- target-oriented management;

businesses need to apply new approaches, acquire tools and solutions, and ensure a centralized, integrated information system is in place.

The role of Enterprise Performance Management (EPM) is to help bridge the gap between strategy and execution by providing a framework in which information can be delivered in the appropriate way and at the right time, so that plans can be reviewed, objective progress assessed, and performance evaluated.

Organizations that have implemented ERP systems know that although the data needed to run the business is stored in the system, it is often difficult to access and use to make decisions. Enterprise Performance Management (EPM) solutions allow business users to carry out the planning, monitoring and analysis functions that they need to ensure Key Performance Indicators (KPI's) and performance goals can be achieved.

SYSPRO provides features to enable you to plan, monitor and analyze your organizational processes and KPIs. Synoptic views of decision-drivers and critical thresholds are provided through features such as Executive Dashboards, SYSPRO Analytics and Cash Flow Forecasting.

SYSPRO 6.1 allows users to configure any aspect of the user interface in any application to build in dynamic executive views and/or dashboards. These views are based on sophisticated charts, list views and interactive charts (the latter forms part of SYSPRO's Executive Dashboard module). The views can be dropped into any application in a few seconds and are immediately active. All views are based on real-time information and can be customized exactly to the user's requirements.

SYSPRO 6.1 includes a number of new features that enable EPM within the product:

- Executive Dashboards provide visual real-time analysis of organizational KPIs, with the added capability of what-if modeling. You can add an Xcelsius interactive chart to any application by selecting from the standard SYSPRO KPI templates or by creating your own.
- Cash Flow Forecasting provides the capability to create multiple cash flow models based on optional inflow and outflow criteria from receivables, payables, cash book, general ledger, purchasing and sales.
- SYSPRO Analytics enables you to derive multi-dimensional perspectives of your data for identifying trends and opportunities. It provides relational data intelligence through its pre-defined and customizable OLAP cubes, with the output being viewable through SYSPRO's Analytics Viewer, as well as other front-end tools.
- Boardroom Quality Reporting

Executive Dashboards

SYSPRO Executive Dashboards is an interactive visual analysis solution that is seamlessly integrated into the SYSPRO ERP solution.

It allows businesses access to a visual presentation of the real-time data in their ERP solution without the need to incur the large investment typically associated with Business Intelligence solutions.

It provides executives with the business process management and what-if analysis tools to leverage strategic advantage from their investment in ERP.

These dashboards are a fusion of the capabilities of SYSPRO Executive Views and SYSPRO Business Objects with that of Crystal Dashboard Design - a product that delivers next-generation visual analysis tools that allow users of different skill levels in small, mid-size, and enterprise companies to transform complex business data into actionable visual information. This technology forms part of the SYSPRO Dashboards module to provide an interactive visual view of a company's data.

You create executive dashboards using the *Customized Pane Editor* > *Main Menu* > *Executive View* tab.

You can configure dynamic executive views and dashboards from a number of pre-defined dashboards which, once dropped into any application, are immediately active.

The following types of dashboards are available:

- Flowcharts
  This dashboard builds the steps on which different financial ratios are calculated. Years and budgets are compared for up to 10 years.
- Gauges
  This dashboard displays trends of financial ratios between current and previous years, as well as the current year versus the current budget.
- Timelines
  This dashboard displays a timeline of financial ratios for the past two years and current budget performance.
- Trend analysis
  This dashboard displays financial ratio trends of the percentages of the past three years including budgets.
- Widgets
  These widgets compare the past three years and budget values of financial ratios.
- Performance overviews
  This dashboard displays the top and bottom 10 suppliers based on measures, including period detail, for the past three years.
- Scorecards
  This dashboard displays a scorecard of the top and bottom five suppliers based on the average purchase price, backdated for three years.
- Sales
  This dashboard displays % profit, % budget attained, total units and sales values.
- WIP

  This dashboard displays expected and actual costs, efficiencies and cost variances for WIP.

CASHFLOW FORECASTING

The effective projection of currency-based cash flow requirements is facilitated by the capability to create multiple on-line cash flow models from a variety of inflow and outflow data, such as receivables, payables, cash book, general ledger, sales, purchasing, demand forecasts and material requirements.

The Cashflow Forecasting model enables managers to view their company's projected cash position into the future by applying outstanding payables (cash requirements), receivables (payment projections) and other cash projections to the current bank balances. The information is presented in graphs and listviews in customizable panes.

You use the **Cashflow Models** program to define the cashflow models you require for your company, as well as to view the cashflow forecast results using these models *SYSPRO menu* > *Cash Book* > *Cashflow Forecasting* > *Cashflow Models*.

In this release of the **Cashflow Model** program, you can project cash flow using data from the following sources:

- Cash Book permanent entries
- Accounts Payable cash requirements
- Accounts Receivable payment projections
- General Ledger movements

Future releases will enable you to use data from Purchase Orders, Purchase Order Requisitions, Forecasted Sales and Material Requirements.

You can view the results returned by the Cashflow model in the model's listviews and graphs. SYSPRO Reporting Services reports for the Cashflow Model will be included in a future release of the software.

SYSPRO Analytics

SYSPRO Analytics provides a multi-dimensional view of pre-defined Key Performance Indicators (KPIs) covering all aspects of the business. Transactional data is extracted and populated into SYSPRO Analytics data warehouses, from which Analytics cubes can be created. Although SYSPRO Analytics has its own viewer, any front-end tool, such as Excel, can be used to access Analytics data, or an Analytics session can be set up within any SYSPRO application.

Pre-defined cubes will be provided that are based on standard KPI's covering all aspects of the business. Streamlined processes enable you to extract standard SYSPRO ERP data into Analytics data warehouses from which Analytics cubes can be created, and you will be able to access Analytics information from any front-end tool.

The primary objectives of SYSPRO Analytics for SYSPRO 6.1 are to:

- simplify the administration of the SYSPRO Analytics system;
- provide more stability, ease of customization and a logical database structure;
- change the user interface to be in line with the evolution of SYSPRO's look-and-feel;
- facilitate various alternate viewing options;
- provide access to most SYSPRO tables; and
- provide access to an Analytics session from within a Customized SYSPRO Pane.

This will be achieved through:

- implementing changes to the new Analytics database;
- re-designing OLAP back-end and SYSPRO cubes;
- updating the User interface;
- re-designing the information API to make it open - thus providing access to any SYSPRO OLAP Cube via any OLAP Front end Viewer (such as Excel) not only the SYSPRO Analytics Viewer;
- streamlining the ETL processes to improve data Integration;
- changing the setup group of programs to cater for the back-end changes; and
- changing the order and location of the various setup and administration functions to be more logical.

Boardroom Quality Reporting

For financial and operational reporting, SYSPRO Reporting Services (SRS) has the functionality to produce high quality reports and documents, together with visual analysis capabilities. SRS uses Crystal Reports which provides flexibility for designing reports to almost any requirement. SRS reports are version-independent so companies can upgrade to a new version of SYSPRO without negatively affecting their customized reports.

Business Process Management

Increasing organizational complexity necessitates the employment of tools to manage the design and communication of business processes, as well as the administration of the systems used to execute these processes.

SYSPRO's Role Management capability helps you to streamline complex system administration tasks by providing centralized management of the design of security, eSignature-authentication and the user interface, for SYSPRO companies, groups and operators. It also simplifies the assignment of the appropriate settings where staff switch or perform multiple roles and enables the definition of an on-line organogram to provide users with a visual overview of your company's role structure.

- A built-in workflow engine SYSPRO Workflow Services (SWS) enables you to streamline end-to-end business process activities within SYSPRO, as well as to create efficient interactions between SYSPRO and external touch points. Built on the Microsoft Windows Communication Foundation, SWS enables you to apply rules-based control over business processes, thereby promoting process cohesion, as well as collaboration among process role-players.
- SYSPRO Enterprise Analysis and Modeling (SEAM) is a powerful on-line toolset that enables the alignment of the SYSPRO ERP system with your organizational realities, from the highest strategic levels through to the step-by-step procedures and detail configurations. Besides reducing the time to delivery by ensuring seamless handover at different stages of a SYSPRO implementation, SEAM provides a smooth system transition when roles or processes change as a result of normal business evolution.

  The SEAM framework includes a set of baseline business processes and role definitions that serve to guide the on-line modeling, development, definition and publication of the blueprints of your business processes, structures and KPIs, along with how these will be implemented in SYSPRO and why. The on-line repository provides Single Source of Truth (SSOT) ensuring a common understanding among the stakeholders, of the organizational goals, roles, activities and dependencies.

SYSPRO has always included an element of Business Process Management through its Office Automation and Electronic Signature tools. These tools enable you to pre-define conditional events that trap data and system exceptions and trigger an appropriate action in support of a customer's business rules and processes.

In SYSPRO 6.1, Business Process Management is elevated to a new level with the introduction of SYSPRO Workflow Services, SYSPRO Process Modeling and SYSPRO Implementation Methodology.

SYSPRO Workflow Services

A built-in workflow engine - SYSPRO Workflow Services (SWS) - enables you to streamline end-to-end business process activities within SYSPRO, as well as to create efficient interactions between SYSPRO and external touch points. Built on the Microsoft Windows Communication Foundation, SWS enables you to apply rules-based control over business processes, thereby promoting process cohesion, as well as collaboration among process role-players.

As well as providing a set of sample workflows and activities, SWS facilitates the creation of custom activities and workflows unique to your environment using its visual design tools, thereby enabling you to model and formalize your business processes. The client-based Workflow Administrator allows you to design, test, administer and deploy workflows across your organization, while the server-based Workflow Service provides the engine that hosts, co-ordinates and tracks these workflows. Being SOAP and web-enabled, SWS permits operators to process transactions remotely and without necessarily having SYSPRO installed on the desktop.

Once workflows are deployed, the Workflow Monitor provides workflow status and performance information, thereby helping you to identify the progress of any particular instance of a workflow, as well as activity and process bottlenecks within your organization.

SYSPRO Workflow Services incorporates a workflow engine that is flexible and customizable so that an organization can model and apply its own business processes. It is a platform based on the Microsoft Windows Workflow Foundation and provides the capability of designing and visualizing the workflow processes including conditions, actions, notifications, etc.

It promotes collaboration of effort between business analysts and developers in streamlining the interaction and business processes between various parts of the SYSPRO ERP solution.

SYSPRO Workflow Services comprise:

- a client-side application that allows users to design, administer and deploy workflow processes to the enterprise
- a server-side Windows Communication Foundation service that will host and co-ordinate the collaboration between the SYSPRO core processes and the defined workflow process

You manage, test, deploy and analyze your workflow processes using the **SYSPRO Workflow Services Administrator** program *SYSPRO menu > SYSPRO Workflow Services > Workflow Administrator*.

You add, change and delete workflows and activities using the **Workflow Library** program *SYSPRO menu > SYSPRO Workflow Services > Workflow Administrator > Workflow Library*.

You design workflows using the **Workflow Designer**, which is enabled when you add a workflow in the **Workflow Library**.

SYSPRO Process Modeling

The key to a successful ERP implementation is the effective alignment of the company's strategy and business processes through the ERP functionality set. SYSPRO Process Modeling (SPM) is a personalized baseline model integrating customer requirements and SYSPRO software. SPM provides you with a model-driven architecture that supports management by aligning IT with company strategy, business objectives and sustainability; as well as providing a transparent view of your uniquely modeled processes and organizational roles.

The key to a successful ERP implementation is the effective realization of the company's strategy and business processes through the ERP functionality set. SYSPRO recognizes that your company's uniqueness is its competitive edge. Therefore the best solution is a blend of tried-and-tested ERP, integrated with your uniquely engineered business processes, creating a unique process model for your organization.

SYSPRO has pre-configured and modeled process patterns to support your business. These patterns include Patterns for Usage, Patterns of Functionality and Patterns of Configuration. Along with your business knowledge, we select and configure the patterns which are the best match for your business. In this way, we do not start our implementations from scratch, but bring a wealth of experience, knowledge and industry processes to realize your ERP implementation.

There are two very basic, but compelling reasons to start with a pre-configured model:

- The models are a reflection of best practice in a particular industry; and
- The business will know up-front what the system can and cannot do and use that as a basic point from which to start.

SYSPRO Process Modeling provides you with a model-driven architecture that supports management by aligning IT with company strategy, business objectives and sustainability; as well as providing a transparent view of your uniquely modeled processes and organizational roles.

Your primary source of information is no longer Word documents (that have no relationship to one another) but interrelated models that:

- give you a clear understanding and transparency of your business, processes and systems across your organization;
- move your company's unique process requirements from the minds of individuals to a central repository;
- speed up understanding of business requirements or solutions options, resulting in a better quality implementation;
- standardize and record processes as they evolve;
- allow for what-if scenario planning in the models before implementation;
- provide you with project control and understanding across your implementations and upgrades (request the SYSPRO Thinking about ERP book for more detail);
- define system configuration and integration from the modeled business processes;
- provide you with a central change repository for all changes, whether at business, process, or system level;
- allow for the standardization of business models across different organizational business units; and

- provide an audit trail of the collaborative business decisions made during the modeling of the processes.

SYSPRO Enterprise Analysis and Modeling

SYSPRO Enterprise Analysis and Modeling (SEAM) provides empowered, personalized implementations. By being a dynamic part of a SYSPRO site from inception, SEAM manages all aspects of the Sales and Implementation Cycles. It embraces the SYSPRO Process Modeling and provides a record of all conversations and decisions made during these cycles. In addition, information can be used to automatically configure the SYSPRO Application and provide insight into the structuring of the associated data.

SYSPRO Enterprise Analysis and Modeling assists in the management of expectations by providing transparency between Sales and Implementation, through the provision of standards, procedures and tools. It also enables focused thinking, thereby quickly raising stakeholders understanding of the business needs and processes; and facilitates structured, efficient and cost-effective implementations.

Execution and Operational

ACTUAL COSTING

Actual cost tracking enables you to monitor the actual costs of a batch serialized or lot traceable item for all item movements, thereby providing improved accuracy for job-cost estimating and product pricing. It is an additional costing method that is particularly useful for companies operating in highly price-competitive and margin-pressured environments, as well as for manufacturers dealing with extreme fluctuations in raw material prices.

Actual costing is typically required by companies in an environment where the cost of materials experiences large fluctuations over a period of time. With smaller profit margins and extreme fluctuations in raw materials, the need to accurately track actual costs is vital for a company to maintain its profitability.

FIFO valuation buckets are used to track and process costs for lot traceable or batch serialized items.

When processing an item, the system automatically enables you to select specific lots with associated receipt costs. If more than a single receipt/cost exists against a lot then you are prompted to select quantities from buckets that have non-zero quantities. If a transaction is reversed, then the costs and quantities are posted back to the original bucket(s). A full audit tracking of costs in and out of the system is maintained. .

RESERVING STOCK

Operators with the relevant authority levels can reserve quantities of stock for customer orders during order entry and backorder release activities, without the need to define specific lots, bins or serials. This enables them to guarantee order delivery prior to the actual shipping process.

A criteria-based review enables the reserved stock to be reviewed and confirmed to ship as required; at this stage quantities can be changed to match those picked, and lot and serial details added.

The ability to reserve stock provides more control over the allocation of items and aligns the SYSPRO software more closely with business processes.

You select that reserving stock is required in the **Sales Order Setup** program *Setup > Distribution > Sales Orders > Details*. The *Ship Quantity* option is selected by default as the default ship status, but you can change this by selecting the *Reserve quantity* option.

Stock can be reserved while entering an order or releasing back orders without allocating specific lots, bins or serials.

When a sales order is linked to a receipt (this can be a purchase order receipt, purchase order inspection receipt, job receipt, job inspection receipt or a LCT shipment receipt), then you can select one of the following setup options *Setup > Distribution > Sales Orders > Details*:

- The receipt must update the ship quantity on the order (*Quantity shipped*).
- The receipt must update the reserved quantity on the order (*Quantity reserved*).
- The receipt must update the reserved quantity only if the order is in a status of 4 or 8 (*Reserve if status 4 or 8*).

Setup functions allow you to choose the method of allocation including the ability to restrict choices for certain operators.

Stock may be assigned as reserved on an associated sales order when receipting from jobs or purchase orders. This can be done always, or only when the order is already in a status of ship.

A review program allows reserved stock to be reviewed in the warehouse (using extensive criteria) and then confirmed to ship. Quantities can be changed to match those picked, and lot and serial details added.

MANUFACTURING UNIT OF MEASURE

SYSPRO enables you to define and process both manufactured parent and component quantities in a unit of measure other than stocking. Unit costs, quantities, values, run time and time taken (where applicable) are displayed and printed according to the relevant unit of measure selected.

This feature is particularly useful in situations where products have manufacturing specifications which are optimized for the capacity of the relevant manufacturing resources, but which are sold in different packaged quantities (e.g. a chemical product may be sold in kilograms, but have a production mix quantity which denotes the optimal batch size for the vat in which it is blended).

SYSPRO's manufacturing unit of measure facility allows you to define a unit of measure against parent parts and components in the **Bill of Material** and **Work in Progress** modules that enables you to capture, display and print the quantities in the manufacturing unit of measure instead of the stocking unit of measure.

You enable the manufacturing unit of measure facility in the **Work in Progress Setup** program *Setup > Manufacturing > Work in Progress Setup > General 2 > Use manufacturing u/m*.

You define the manufacturing unit of measure and conversion factors at stock code level using the **Stock Code Maintenance** program.

Note:

The manufacturing unit of measure fields are not available under the following conditions:

- The part category is one of the following:
    - planning bill;
    - kit part;
    - phantom part; or
    - notional part.

Care should be taken if the stock code is lot traceable, serialized, or if you use multiple bins in an associated warehouse. For example: you package eggs (which are serialized) the stocking unit of measure is each and the manufacturing unit of measure is dozen. When issuing one dozen eggs to a job you are still prompted for the 12 serial numbers, as that is the stocking unit of measure.

Once a quantity is captured in the manufacturing unit of measure, it is stored in a manufacturing unit of measure *entered quantity* field and converted back to the stocking unit of measure according to the conversion factors held against the inventory master table. This simplifies reporting as no further conversion is required for quantities.

All quantities and unit costs are still saved according to the original stocking unit of measure.

CONCURRENT MANUFACTURING OPERATIONS

The definition of negative movement time between manufacturing operations provides the capability to plan for the operations to run concurrently. Configuration options allow you to specify whether two operations start or end together. This ensures they remain concurrent even if elapsed time changes.

You capture the movement time for an operation using the **Structures and Routings** program for stocked items and the **Estimates** program for non-stocked items. You can change the movement time of an operation using the **Job Maintenance** program. You can also define movement time using the **Work Center Move Matrices** program.

Entering a movement time of `-999` between operations will mean that the current operation and the next operation begin together, or concurrently, even if the elapsed time changes.

Entering a movement time of `0` will mean that the current operation and the next operation will end together.

If the next operation is longer than the previous, they can start on the same day.

If operations are sequential (i.e. the next operation cannot end before a prior operation) then the operations will end on the same day. However, if you enable the Work in Progress option: *Allow operation to end earlier than prior operation*, then the next operation will start on the same day as the prior operation and end a couple of days earlier than the prior operation.

If you enter a movement time greater than the negative elapsed time, then the movement time reverts to the negative movement time. For example: If the elapsed time of the operation is 63 and you enter a movement time of -500 or -70, then the movement time reverts to 63. If you enter a movement time of -50, then the movement time remains as -50 and if you enter a movement time of -999, then the movement time remains as -999.

WORK CENTER UPDATE

At the time of maintaining cost centers you can use the *Update Work Centers* function to update associated work centers automatically with additional information, rates and general ledger codes.

You have the choice of updating all associated work centers or a single work center. This may save system maintenance time.

CUSTOMER RULES

Sales order customer rules cater for the application of processing constraints in various order processing environments. They include controls for minimum order values, full-order-only shipping, small order penalties and the specification of different delivery addresses per order line.

The sales order process caters for a number of customer rules. These include:

- Full order only (i.e. only process an order if the full order can be satisfied).
- Minimum order value (i.e. only process the order if it is above a minimum value).
- Charge for small order (i.e. orders below a certain value incur a penalty charge).
- Address code per order line (i.e. allow goods to be delivered to different addresses from the same order).

TAX

Legislative and tax complexities require extensions to the way of handling USA tax and EU tax.

- USA Tax
    - Record and use Historical Tax Rates.
    - Provide a linkage mechanism allowing users to call a 3rd party tax system of their choice.
    - A new setup business object allows USA tax codes to be added and maintained.
- EU Tax
    - Provide for the storage of additional VAT information in British Pounds.
    - Enhanced supplementary units reporting with tax calculations.
    - Sales Order Documents print and reprint will allow values in an interim currency to be printed when triangulation in use.

EXTEND DUPLICATE INVOICE NUMBER CHECKING

The facility to check for duplicate invoice numbering has been extended to all places where the invoice number is allocated, instead of when the invoice is processed. A new table will store the invoice number and place of allocation (e.g. Sales Order Entry, Dispatch Note, Batch Invoicing, AR Invoice Posting, etc.) thereby providing an audit trail of when and where the number was allocated.

SALES ORDER PURGE

You can retain sales order information in months instead of days. This enables some companies to comply with legislative requirements to retain information for up to seven years. Previously, this requirement could only be met by retaining sales order information indefinitely (i.e. 999 days).

You specify a monthly retention period for sales order information using the **Sales Order Setup** program *Home > Distribution > Sales Orders > History > History retention is expressed in months*.

If you enable the monthly retention period option, then the **Order Purge** program bases the calculation for retention on months instead of days.

PURCHASE ORDER REQUISITIONS

The stores issues feature facilitates the routing of stock issue requests (such as those made by a mobile sales force or branch network) through an electronic approval process. Furthermore, it provides for the creation of the appropriate replenishment documents (i.e. a stores requisition or supply chain transfer is created on approval instead of a purchase order).

To align the SYSPRO software more closely with business processes, detailed control has been extended to the various requisition activities, including the monitoring of budgets and approvals.

Requisitions can be completed by creating a stores issue or by creating an SCT order. This is processed as follows:

- Requisitions are entered as normal requisitions, or purchase order requisitions.
- Approved requisitions (of both types) are viewed and marked to be issued from a selected warehouse, or to be purchased.
- Requisitions are completed by issuing directly from stock, or by creating an SCT order as well as the current option of creating a purchase order.

You can define requisition groups to which you assign requisition users. This caters for approval levels (optionally specified at group level, or at product class within group level).

SETTLEMENT DISCOUNT ON TAX

The Accounts Payable settlement discount facility complies with Canadian tax legislation by providing an option that allows operators to choose whether to reduce the tax amount of an invoice when taking settlement discount.

For each invoice, the **Invoice Posting** program records whether you want to reduce the tax amount of an invoice. The payment process caters for your selection when calculating tax on invoices with settlement discount.

TAX RETURN REPORTING SYSTEM

By catering for the consolidated reporting of sales tax (e.g. VAT, GST, etc.,) the tax return reporting system makes it easier to submit tax returns to authorities. In particular, linking this to the UK VAT return system (VAT100) replaces the need for a third party VAT100 system.

AUTOMATING SYSPRO APPLICATIONS

SYSPRO provides seamless automation of activities such as month-end tasks and reporting. Key to this automation is the facility to configure editable SYSPRO forms to retain previous form values - this reduces the amount of user interaction required when executing applications and reports that prompt for various selection criteria. For example: If multiple people in your organization run the *Backorder Release* application (each with their own selections for branch, warehouse and geographic area) then their individual selections can be saved for the next time they run the application.

Furthermore, using this form functionality in conjunction with the SYSPRO Task Manager, you can schedule a group of tasks (such as your month end processes) with pre-defined selections, and run them unattended. You can also define automatic actions to be taken in the event of errors and whether log files and reports are to be delivered via email or printed.

The facility to automate SYSPRO applications reduces the need for third party applications (e.g. Automate) to run scheduled tasks.

You use the **Automation Design** program *Options > Automation Design* to define the programs and automation entries that you want to automate.

You use the **SYSPRO Tasks** program to add tasks to run these programs automatically, using the automation entries you have defined.

You use the **IMPAUT** program to execute these pre-defined tasks automatically. The **IMPAUT** program can be executed from the command line or can read parameters from a batch text/text file instead of the command line. You can use *Windows Scheduled Tasks* to schedule the execution of these batch text/text files. These tasks can be limited per company or available system-wide.

The user-interface of a number of programs enables you to apply default values to the application in advance of running the program.

The program can be configured to run automatically (using special parameters) with a known set of values.

Once processing is complete, you can:

- print the contents of the listview automatically (this is output to your default printer)
- email the report to one or more email recipients (using the semi-colon as a separator)
- close the program automatically.

All the programs available for automation are displayed in the **Automation Design** program.

INVENTORY DOCUMENT TABLES CONVERTED TO SQL

The conversion of Inventory document tables to SQL improves SYSPRO queries and data integrity for companies using SQL.
You define the inventory documents required using the **Inventory Setup** program *Setup* > *Distribution* > *Inventory* > *Documents*.

You can define the following inventory documents:

- Receipts
- Issues
- Transfer Out
- P/O Receipts
- Inspections.

The following CISAM tables have been converted to SQL:

CISAM file name	New SQL table name	Description
INVDOC.dat	InvDocument	Inventory Document Print Transaction
INVDOI.dat	InvInspectDoc	Inventory Inspection Document
INVDOS.dat	InvDocumentSerial	Inventory Document Tran file for Serials
INVDOX.dat	InvInspectDocSer	Inventory Inspection Document - Serials

The **Convert Data to 6.1** program will convert the CISAM files into the SQL tables on data conversion.
Previously, these document print files were always in CISAM format, regardless of the company-configured data storage medium. These files had complex data definitions that were not imported into the data dictionary. You were therefore unable to use these data files in a meaningful way in SYSPRO's **Report Writer** program or any other report writing/querying tool.
These complex data definitions are now defined in record layout files and, if using SQL as the data storage medium, are now SQL tables.
Note:
A record layout is a text file that describes a SYSPRO data file. It is typically imported into the SYSPRO **Data Dictionary**. It contains a CISAM data definition and usually also contains information describing a parallel SQL Server table.
This means that you can:

- view and interpret the data using the **Data Dictionary Viewer** (DDSBFI) program;
- use these files or tables in SYSPRO's **Report Writer** to create meaningful reports; and
- interrogate these files or tables directly in **SYSPRO Reporting Services** to create your own documents and meaningful reports.

Management and Control

Warehouse Management System

The Warehouse Management System provides the tools for managing and controlling the flow of materials and products, from receiving to dispatch, in a multi-warehouse environment. It helps to streamline warehouse tasks such as picks, putaways, allocations, issues, cross dockings and cycle counts.

The Warehouse Management System module provides the infrastructure required for warehouse management at bin level and comprises the following modules:

- Foundation
- Basic
- Advanced

WMS FOUNDATION

The Warehouse Management System Foundation module provides the infrastructure required for bin level warehouse management and its interaction with lot traceability and serial tracking of products. It facilitates the creation of logical groupings of related warehouses, as well as bins within warehouse by primary function such as bulk storage.

Configuration features enable bin dimensions, location within warehouse, and operational information (such as flow type) to be recorded and used for validation in areas where bins are required. Unit of measure configurations per stock code provide for the capture and storage of barcode and physical dimension information.

All WMS features will integrate with current inventory functionality such as lots and serials. This will include changing current inventory transfer programs to allow the selection of inventory within a bin in a WMS-managed warehouse. Order line status will have a new status to indicate that the line is currently under the control of the WMS.

Units of measure configuration will be added per stock code which will allow the capture and storage of barcode and physical dimension information. New configuration for bins will be added to allow bin dimensions, location within warehouse and operational information such as flow type to be recorded and used for validation in places where bins are required.

A method of logically grouping related warehouses will be included, as well as an area structure within warehouse to allow bins to be grouped by primary function, such as bulk storage. Some basic enhancements to WMS related activities, such as bin sequencing of pick notes will be provided. All new functionality will also be supported by business objects.

Contact Management

'CMS ONLY' USER LICENSE

The SYSPRO licensing model allows users to have access to only the features of the Contact Management System. These *CMS Only* users are exposed to the Contact Management System features without increasing the number of licensed concurrent users.

Note:

CMS Only User licensing is for the SYSPRO client-server product and is not related to the Web Applications.

You enable a *CMS Only* operator from the *Options* tab of the **Operator Setup** program *Menu bar > Setup > Security > Operators*.

When a *CMS Only*-enabled operator logs into SYSPRO, a single CMS Only user license is consumed and the operator is limited to accessing only features within the Contact Management System.

CMS DYNAMIC ORGANIZATION LISTS

You can define Organization Lists with conditions that are evaluated at run-time to generate a specific list of Organizations.

CONTACT ACTIVITY USER FIELDS

You define the captions for the activity user fields using the **Contact Management Setup** program *Menu bar > Setup > Financial Setup > Contact Management*.

You enter these user fields when posting an activity, either from within SYSPRO *SYSPRO menu > Contact Management > Contact Query*, or when capturing an email in **SYSPRO Office Integration**.

You can specify default values against the defined user fields from within the **Activity Maintenance** program to ensure that the operator only selects the user field values from a predefined list. If no list is defined, you can enter free format text against the field.

You can include the user fields in the search criteria. This is enabled from the **Contact Query Preferences** program.

The user fields are shown in the *Contact View* of the **Contact Query** program as well as in the *Search View* when searching Activities.

You can use the *Field Chooser* to add the fields to the *Activities* listview.

REAL-TIME GENERAL LEDGER

SYSPRO provides the option (at sub-ledger level) of indicating whether sub-ledger transactions should update the general ledger automatically or in batch mode.

Automatic mode reduces the administrative burden of managing the flow of information into General Ledger and eliminates the time lag between transacting and reporting. This in turn allows management to monitor and manage the financial position of the company in real-time.

You use the **General Ledger Integration** program to configure a number of settings enabling the automatic creation and posting of General Ledger journals. Although you can select automatic posting, journal and distribution reports still exist and can be printed and reprinted for audit trail purposes if required. In addition, journal authorization can be used with transactions from sub-ledgers.

To retain the previous posting method, you must disable the options to Create GL journals and to Post GL journals (i.e. no automatic journal creation and posting). Despite retaining the previous method, there is a new program that will be used to produce the sub-ledger journal and distribution report in a single step.

The new options in the **General Ledger Integration** program enable you to select any of the following for each sub-ledger:

- Automatically create, but manually post General Ledger journals.
- Automatically create and automatically post General Ledger journals.
- Manually create, but automatically post General Ledger journals.
- Manually create and manually post General Ledger journals. (This equates to a simplified version of SYSPRO's existing General Ledger batch posting process for users who prefer the previous manual method of posting to the General Ledger).

Imported General Ledger journals are automatically posted.

ASSET REGISTER

The functionality of the Asset Register module has been improved to appeal to a global audience.

Depreciation methods have been increased to cater for legislative requirements in various countries. It now also supports the MACRS methods (used by the IRS in the USA) and a MACRS import function has been created to populate depreciation tables.

New depreciation methods include:

- None
- Straight line, varying per month
- Sum of years digits
- Remaining value over remaining life
- Declining balance with switch to straight line when optimal

- Declining balance, no switch to straight line

Depreciation flexibility has been provided for per depreciation book (Book Value, Tax and Alternates) to define depreciation (e.g. each can have their own depreciable amount, depreciation code and depreciation dates). In addition, the basis for depreciation (e.g. year, period and life) can be defined to indicate the extent to which depreciation is recalculated for that depreciation book at each depreciation run.

Support for the following time/date conventions can be defined per depreciation book (Book Value, Tax and Alternatives) or depreciation code:

- Full-month convention (default for Book Value and Alternate valuations)
- Mid-month convention
- Half-year convention
- Modified half-year convention
- Full-year convention (default for Book Value and Alternate valuations)
- Mid-quarter convention (not technically a time convention, but a specific requirement for the USA)
- Canadian Half-year CCA rule

The number of Alternate Valuations on Assets has been increased from 3 to 10.

Automatic numbering of assets and capexes has been provided.

Asset history can be retained for unlimited periods.

The option to exclude residual from depreciation has been extended to alternate valuations. New rounding options have been provided (i.e. rounding up, down or normal rounding).

The Asset programs have been more closely aligned to actual business processes, by replacing the **Asset Setup** program with an **Asset Entry** program; by replacing the **Asset Takeon** program with an **Initial Capture** program and enhancing the **Asset Import** program to use a Business Object (to behave in the same way as Entry or Initial Capture programs.

The following additional transactions are now permitted:

- Inter-company transfers
- Additions to existing assets (also from capex)
- Creation of multiple assets off a single asset in suspense
- Undisposal of an asset previously disposed
- Partial disposal of an asset
- Split an existing asset into more than one asset
- Monetary adjustments (write-offs) by Asset Count
- A Balance function (added to the Purge program)

INVENTORY OPTIMIZATION

The Inventory Optimization (IO) module provides the tools and processes to optimize inventory within the SYSPRO product. For this we need to track and manage the parameters that shape inventory and its causes. The IO Module will make these parameters visible and controllable and provide the tools to determine the impact of changing these parameters on service levels, stockholding, delivery performance, and manufacturing or procurement performance.

Specifically, the Inventory Optimization module will:

- set target order frequencies (cycle stock) using the collections defined in Families & Groupings;
- include the ability to define service level measures to use and set target service levels;
- track actually achieved order frequencies (cycle stock);
- provide outbound service level reporting and tracking;
- forecast accuracy reporting and guidelines to improve this;
- calculate minimum (safety stock) and maximum levels dynamically with changing demand and service requirements into the future;
- provide tools to determine where and why inventory is not in balance (excess or shortage) and then to balance it;

- provide tools to identify and redistribute excess stock; and
- provide tools for inventory modeling and what-if scenarios:
    - provide intelligent defaults for lead times, order frequencies and target service levels;
    - provide reporting on aspects such as lost sales, days of stock cover and days of out of stock; and
    - enhance the functionality of Requirements Planning.

SYSPRO Factory Scheduling

The **SYSPRO Factory Scheduling** module includes a number of new features:

- New setup options
    - Include in scheduling: sales orders, forward orders and orders in suspense.
    - Scheduling groups: provides for multiple manufacturing sites within a SYSPRO company.
    - Scheduling jobs: provides the planner/scheduler with the ability to review when suggested jobs can be scheduled, based on the live jobs already consuming capacity on the schedule.
    - Scheduling horizons: enables you to define the number of days into the future that you want to schedule. The export program only exports jobs with a start date that falls within the number of days you specify.
- New fields
    - The top level job (primary master job number) is displayed in the schedule, enabling you to see the top level job associated to the sub job. This only displays the primary master job (i.e. the same primary master job is displayed for a sub job two or three levels down). In the SFS schedule you can filter on the *Top level job* field. This filters the operations list to only display operations related to the primary master job number you have selected.
    - The sales order number associated with the job/operation is displayed in the schedule. This allows you to filter and display all jobs related to a sales order as well as filter the operations based on the sales order that you have selected.
- New menu option
    - **Schedule Query** has been added to the *Factory Scheduling* and *Requirements Planning* folders of the SYSPRO menu (this loads the published schedule from the snapshot schedule, allowing all operators to view the schedule published by the scheduler).

Business Objects library extended

External developers will have access to a comprehensive library of business objects as a result of all SYSPRO reports being deployed in SYSPRO Reporting Services (the programming logic will have been converted to business objects) and because all new functionality is being developed using business objects.

Extended licensing

SYSPRO allows a license to be generated for up to 9999 concurrent users. This enables SYSPRO to scale to larger sites.

Technology and Integration

Embracing Microsoft technologies, SYSPRO has deployed a number of new technologies in 6.1:

- Workflow Service Host
  This is an additional layer to the SYSPRO Application Server working off Windows Communication Foundation and communications with various applications via SOAP and HTTP.
- XAML Presentation Controls
  The XAML Presentation Controls, working off a Windows Presentation Foundation, significantly extends the client experience. They reduce complexity and allow for extended customization by making it quicker and easier to deploy changes to the way data is represented.
- .NET User Controls
  User controls written using any .NET language can be integrated directly into a customized pane within SYSPRO. This provides greater accessibility and visibility of information from any application.
- Database Server
  SYSPRO 6.1 is available on SQL Server and Analysis Server 2008.
- Installation scripts using MSI
  The installation script for SYSPRO 6.1 uses the Microsoft Installer (MSI) technology. This enables silent installs and remote deployment of the SYSPRO Client.
- Crystal Reports 2008
  The adoption of Crystal Reports 2008 in SYSPRO Reporting Services for SYSPRO 6.1 enables Crystal Dashboard support within any SYSPRO report and the full Crystal Reports designer capabilities available in SRS.
- Crystal Dashboard Design
  This product delivers next-generation visual analysis tools that allow users of different skill levels in small, mid-size, and enterprise companies to transform complex business data into actionable visual information. This technology forms part of the SYSPRO Dashboards module to provide an interactive visual view of a company's data.

SYSPRO E.NET DIAGNOSTICS

SYSPRO e.net Diagnostics is a utility designed to assist developers and implementers in using and deploying e.net solutions. It combines the functionality of several existing SYSPRO utilities into one user interface.

SYSPRO E.NET DIAGNOSTICS EXPRESS

SYSPRO e.net Diagnostics Express is a utility used to assist in implementing SYSPRO e.net solutions.

You access **SYSPRO e.net Diagnostics Express** from the Windows *Start* menu.

The test harness enables you to:

- logon to e.net;
- supply the XML;
- supply the name of the business object;
- invoke the business object; and
- receive the results.

SYSPRO E.NET DIAGNOSTICS 2.0

SYSPRO e.net Diagnostics 2.0 is a comprehensive programming tool which assists you when creating applications using SYSPRO e.net solutions. **SYSPRO e.net Diagnostics 2.0** provides information about the environment for which you are creating a solution, assists you in analyzing and manipulating the SYSPRO data you require and allows you to test the XML used by the business objects.

You access **SYSPRO e.net Diagnostics 2.0** from the Windows *Start* menu.

CONCLUSION

ADDITIONAL RESOURCES

TRAINING

SYSPRO provides extensive training guides that use task-based scenarios to assist you in gaining a working knowledge of the modules and processes within SYSPRO.

Please refer to the Support Zone for details on how to obtain these guides.

SUPPORT ZONE

SYSPRO's Support Zone 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 weekly Support Zone newsletter is distributed to the SYSPRO community. The newsletter covers many aspects of SYSPRO development ranging from product enhancements to support-related information, known issues and useful tips.

You can subscribe to this newsletter from the SYSPRO Support Zone.

COMMENTS

Please send us your comments to help us improve the standard of our reference guides. All emails can be sent to documentation@za.syspro.com.