SYSPRO Orientation Training Guide

SYSPRO Version 6.1 Port 45

Published: 16 August 2011

Revision: SYSPRO Version 6.1 Port 45

Table of Contents

Introduction

SYSPRO Orientation

Welcome to the SYSPRO Community. SYSPRO is a fully-integrated business software solution that provides complete control over the planning and management of all facets of a business including accounting, manufacturing and distribution operations in a variety of industries.

SYSPRO understands that when faced with new software it can be overwhelming to users when trying to navigate through the menus and programs. This guide will familiarize you with the SYSPRO menu and user interface. Tasks are provided so you can practice navigating through SYSPRO and customizing your screens.

We have chosen key topics that you will find helpful as you continue to build your SYSPRO knowledge and skills.

Objectives

This training guide aims to provide first time users or users of new versions a chance to become comfortable with the SYSPRO menu and user interface. It is broken down into a number of objectives that provide you with specific goals you will achieve by the end of each exercise.

Audience

This training guide is aimed primarily at first time users of SYSPRO. However, it can also be used if you are familiar with SYSPRO, but require a better understanding of new functions.

Prerequisites

There are no prerequisites for this course.

The Outdoors Company

The OUTDOORS Company is a fictitious company created especially for training. You will be working with data from The OUTDOORS Company in all tasks.

The OUTDOORS Company was established in 2001. The company's initial operations covered manufacturing and distribution of finished cycles, helmets and garden furniture products for resale to the trade and the general public.

In recent times it has added a specialized projects division, whereby it supplies custom designed garden furniture, including installation of complex outdoor entertainment areas for commercial companies. This is geared to provide a total solution to the customer from design, manufacture through to commissioning of the products on site.

The company aims to meet stated customer service levels, produce high quality goods and deliver on time, while making a profit.

The Executive of the company has formulated the long-term strategy and objectives of the organization covering a two year period in the future.

The Marketing department analyzed the sales history for the past two years (including current trends, factors creating demand seasonally and what the competition is doing) and generated a forecast of sales for the future of existing and new products.

The Finance executives determined a reasonable financial plan by taking into account required return on investment, current financial and manufacturing resources as well as allowing for future growth. The company executives have decided that a customer service level of 95% is acceptable. This means that 95 out of every 100 demands for each item must be met from stock. However, in terms of the projects division, the aim is to achieve close to 100% of demand.

The OUTDOORS Company is also expanding its business to include their suppliers and customers in optimizing their supply chain. Through the use of ERP II functionality (Extending the Enterprise) the company allows customers to order via the Internet and the company orders from their suppliers via an automated process electronically. Prospective buyers can view the models and parts availability via the company's corporate web page and order online. Where the projects division is concerned, a very personalized service is given.

In order to deliver the critical made-in components of the cycle assembly to the assembly floor, The OUTDOORS Company is using SYSPRO Factory Scheduling functionality to deliver on time within quality standards. This also allows for the planning and delivery of products for the projects division, whether outsourced or made in.

The Marketing executive also develops a closer customer relationship with their loyal clients. This is enabled by a 360° view of their clients through Contact Management.

The company is divided into three divisions: Manufacturing, Distribution and Projects.

Setting up the training base data

The following steps describe how to download the training base data that is required for this training guide.

- Ensure that you have a valid login account to the SYSPRO Support Zone.
- Ensure that you are running on a Windows platform, as this is required to make use of the training data.
- Ensure that you have Microsoft SQL Server 2008 R2 (as a minimum) installed, as this is required to make use of the training data.
- Ensure that you do not install the training data on a live site, as important files will be overwritten.

1. Log on to the **SYSPRO Support Zone**.

   The **Support Zone** home page is displayed.

2. Navigate to the **Training Data** folder.

   a. Select **SYSPRO Education Hub** from the **Discover** pane.

   b. Select the **Training** link under the **Training Material** heading.

   c. Scroll down to the bottom of the page (Training Data) and select the link: **Download the Training Data here**.

3. Save the required file.

   a. Save the file in the `SYSPRO61` folder (e.g. `..\SYSPRO61\`).

4. Unzip the file.

   a. Execute the relevant executable file from your `SYSPRO61` folder.

   b. Select **Run** if you are sure you want to run this software.

   c. Select **Yes** if you are sure that you are not installing data on a live system.

   d. Select **Unzip**.

   e. Ensure that the **Overwrite files without prompting** field is selected.

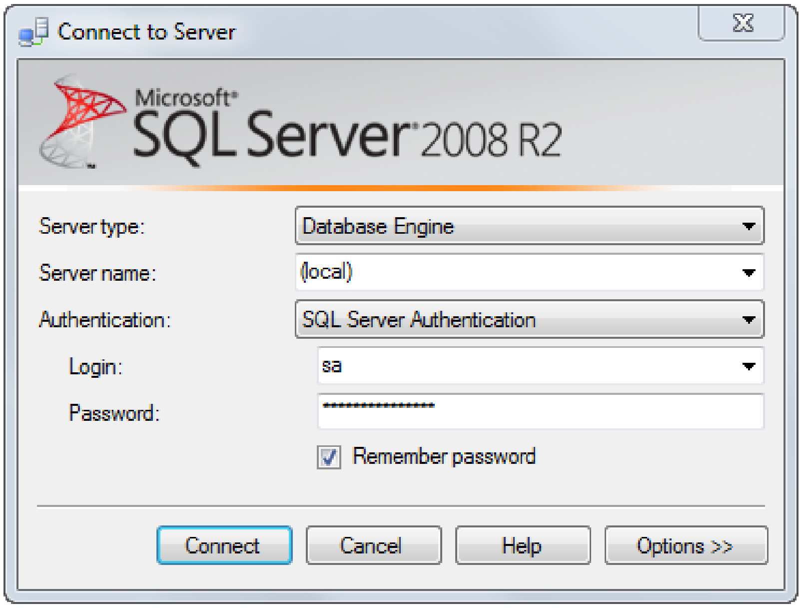
   f. Select **OK**.

   The required ISAM files will be saved in the correct directories. The SQL databases will be saved under a folder called **SYSPRO SQL Databases**.

5. Attach the required databases using **Microsoft SQL Server Management Studio**.

   a. Open **Microsoft SQL Server Management Studio**.

   The following window will be displayed.



b. Connect to the Server.

Accept **Database Engine** as the **Server type**.

Select **SQL Server Authentication** at the **Authentication** field.

Enter *sa* at the **Login** field.

Enter *syspro* at the **Password** field.

Select to **Remember password**.

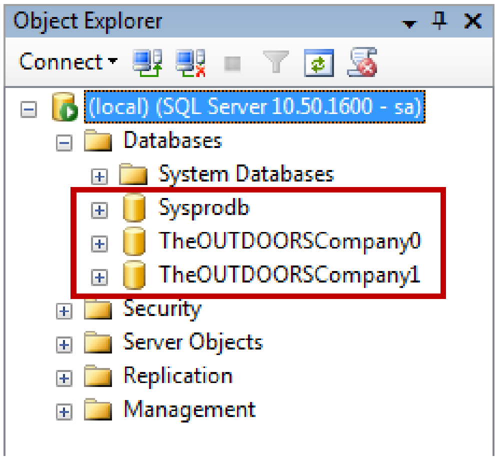
Select **Connect.**

c. Attach the databases.

Attach the following databases:

- Sysprodb
- TheOUTDOORSCompany0
- TheOUTDOORSCompany1

The following window shows the attached databases.



6. Exit the program.

Logging into SYSPRO

The following steps describe how to log into SYSPRO.

1. Open **SYSPRO**.
   a. Select **SYSPRO 6.1** from the **start** menu.

   The **SYSPRO 6.1 Login** window is displayed.

2. Enter the login details.
   a. Enter a valid user name.

   > Enter *ADMIN*.

   b. Enter a valid password.

   > You are not required to enter a password to log in to the training database.

   c. Select **Login**.

3. Enter the company details.
   a. Enter the company id.

      Enter *0* at the **Company** field.

   b. Enter the company password

      You are not required to enter a password to log in to the training database.

   c. Select **OK**.

Menus

Chapter
1

Objectives

In this chapter you will learn about the default user interface, the ribbon bar and SYSPRO button. You will learn how to use the ribbon bar to customize SYSPRO and perform queries.

By the end of this chapter you will be able to

1. Navigate to the correct tab in the ribbon bar for the required function.
2. Create a favorites menu.
3. Change the look and feel of SYSPRO.
4. Change printer options.
5. Add or change an operator password.
6. List the functions which can be performed using the SYSPRO button.

Menus

Menus are used to locate and run the programs that are required for you to perform your daily tasks.

SYSPRO has built-in menus that provide access to the standard programs. In addition, there are menus that you can customize to include only the programs you run most frequently.

Built-in menus include the following:

- SYSPRO menu (explorer-style treeview)
- Ribbon bar (Home, Setup, Import etc.)
- Toolbar (icons below menu bar)

Customizable menus include the following:

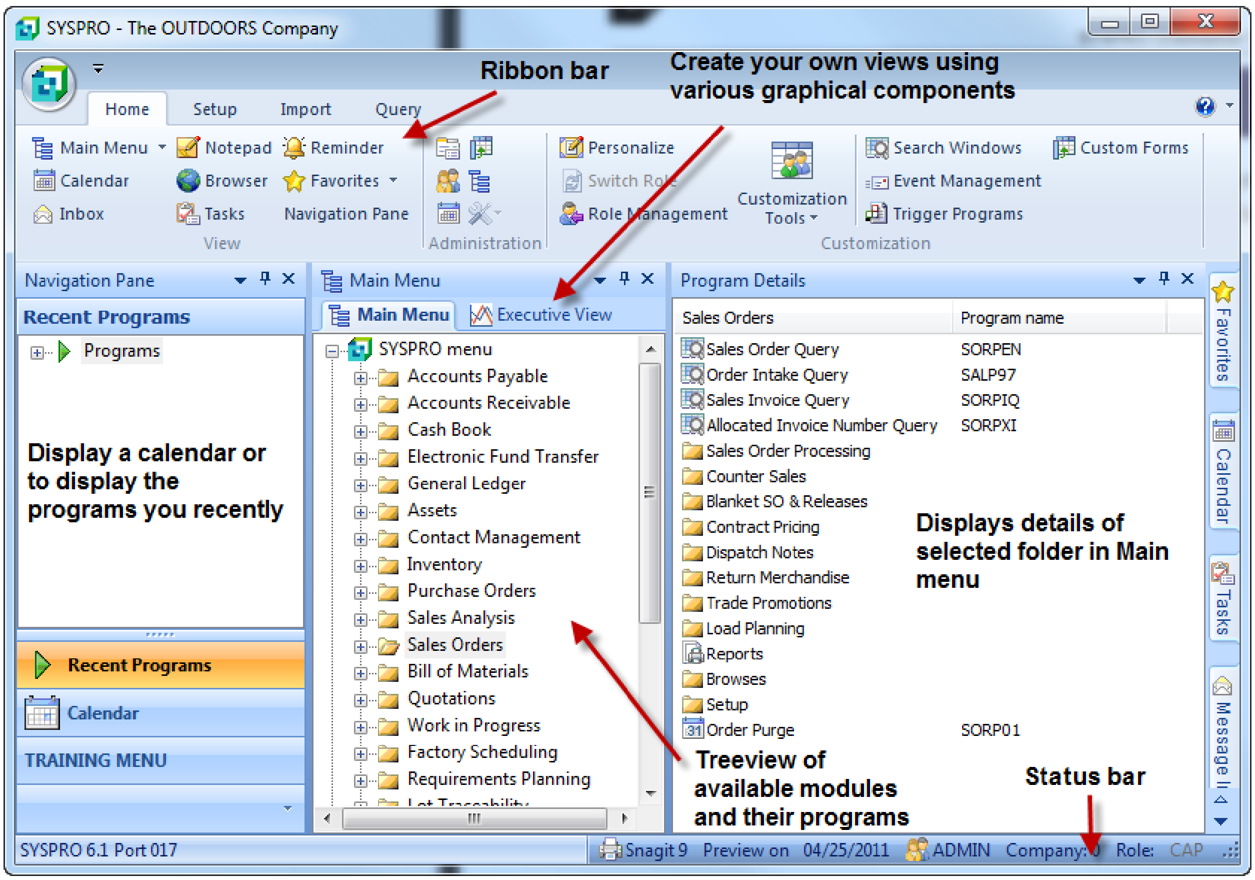
- Favorites
- MyMenu
- Company, Operator, Group or Role specific menus

SYSPRO menu

The SYSPRO menu uses an explorer-style design comprising both treeview and listview panes. The treeview pane displays a hierarchy of folders and subfolders. Each subfolder can contain programs and other subfolders. The listview pane shows the programs and subfolders at the current level selected in the treeview.

Customizing the SYSPRO menu allows you to adjust the look-and-feel of both the treeview and listview.

Each operator can customize the look-and-feel of their menu. Changes are saved as preferences against the operator.



The Ribbon Bar

The SYSPRO ribbon bar contains icons representing the various functions available in SYSPRO. The functions are grouped together by tabs.

The SYSPRO ribbon bar is an alternative to the traditional menu bar.

You can display the ribbon bar using the **Customize** program within SYSPRO (**SYSPRO menu** > **Options** > **Customize** > **Environment Options tab**).

Alternatively, you can use the keyboard to display the ribbon bar by pressing ALT + shortcut key (H for Home, S for Setup and so on) and all the menu items will be displayed with unique keyboard shortcuts.

You can apply different styles to the ribbon bar from the **Ribbon style** field in the **Personalize** program within SYSPRO (**SYSPRO ribbon bar** > **Home tab** > **Personalize** > **Environment Options**).

You can right-click on the Ribbon Bar tab to view other actions, for example adding items to the Quick Access toolbar.

The Home Tab

The Home tab provides quick access to a number of functions within SYSPRO such as the Calendar, Notepad and Favorites. In addition to being able to launch these programs, you can personalize your desktop and programs using options in the **Personalize** program.

Favorites

The Favorites menu is a user-defined list of programs that you frequently run. This provides quick access to programs without having to navigate the SYSPRO menu.

The programs in the Favorites menu are also shown in the SYSPRO Quick Launch menu, which is available from within any program by pressing *F8*.

When you initially show the Favorites menu (select Favorites from the toolbar) you will need to configure a list of programs. This can be done by either dragging a program from the SYSPRO menu treeview onto the Favorites menu, or you can right-click the Favorites menu and add a new program. You can also re-sequence this list of programs.

Customization of the Favorites menu also allows you to adjust the look-and-feel of the listview. For example: you can toggle the listview to show small icons, large icons or details by right-clicking within the listview.

Each operator can customize the look-and-feel of their Favorites menu. Changes are saved as preferences against the operator.

Favorites menu tasks

You want to group a list of programs that you use most frequently in SYSPRO. You will create a favorites menu with SYSPRO programs.

1. While you can drag and drop programs onto the Favorites pane, you will add the SYSPRO program **Supplier Query (ARSPEN)** using the Wizard.
2. You have to access Excel frequently to change a spreadsheet. You will add Excel to your favorites menu in order to be able to access Excel quickly within SYSPRO. Add the EXCEL.EXE using the Wizard.

Creating a favorites menu

The following steps describe how to add a favorites menu of SYSPRO programs in SYSPRO.

1. Open the **Favorites** pane (**SYSPRO ribbon bar** > **Favorites**).
   The **Favorites** window is displayed.
2. Add the required programs.
   a. Right-click on the **Favorites** window and select **New**.
      The **Add New Shortcut Wizard** window is displayed.
   b. Select the type of program you would like to add to the favorites menu.
      Select *SYSPRO program*.
   c. Select **Next**.
   d. Select the program you want to add to the favorites menu.
      Enter *APSPEN* (A/P Supplier Query).
   e. Select **Next**.
   f. Enter the name for the shortcut.
      Enter *Supplier Query*.
   g. Select **Next**.
   h. Select the icon that you would like to attach to the shortcut.
      Select the *Information* icon.
   i. Select **Finish** to end the process.
      The new program should now be visible in the favorites menu.

Creating a favorites menu of third-party applications

The following steps describe how to create a favorites menu in SYSPRO that contains a shortcut to another application.

1. Open the **Favorites** pane (**SYSPRO ribbon bar** > **Favorites**).
   The **Favorites** window is displayed.
2. Add the required programs.
   a. Right-click on the **Favorites** window and select **New**.
      The **Add New Shortcut Wizard** window is displayed.
   b. Select the type of program you would like to add to the favorites menu.

      Select *Any other application*.

   c. Select **Next**.
   d. Enter the path of the item for which you want to create a shortcut.

      Browse and select *EXCEL.EXE* from the **Program Files Microsoft Office** folder.

   e. Select **Next**.
   f. Enter the name for the shortcut.

      Accept the default.

   g. Select **Next**.
   h. Select the icon that you would like to attach to the shortcut.

      Select the *Excel* icon.

   i. Select **Finish** to end the process.

      The new program should now be visible in the favorites menu.

Personalization

You can personalize your SYSPRO desktop by choosing your own skins, selecting to use the ribbon bar or menu bar, changing the listview date format and more.

You personalize the SYSPRO workspace using the **Personalize** program within SYSPRO (**SYSPRO ribbon bar** > **Home** > **Personalize**).

The various options for Personalization are saved and applied for the current operator.

You can override the operator personalization settings by using the **System-wide Personalization** program within SYSPRO (**SYSPRO ribbon bar** > **Home** > **Customization Tools** > **System-wide Personalization**).

Any options applied using **System-wide Personalization** will take precedence over those entered by all operators in their personal workspace preferences. In addition, any such options will disable the equivalent options in the Customize dialog box.

Personalization task

You now want to tailor your workspace, the environment options and how the tasks listview will look for the System Administrator operator.

Below is a list of the customization you want to make to your desktop.

- Workspace
  - Change the backdrop bitmap to Bluestone.
  - Change the background color to light green.
- Environment options
  - Deselect to show the treeview menu in the right hand pane.
- Message options
  - Check for messages on start up.
  - Delete any actioned messages which are older that 30 days.
  - Refresh messages every one minute.
  - Notify when a new message appears.
- Graph options
  - Ensure there are multiple colors per data point.

Customizing your desktop

The following steps describe how to customize your desktop in SYSPRO.

1. Open the **Customize** program (**SYSPRO ribbon bar** > **Home** > **Personalize**).

   The **Customize** window is displayed.

2. Specify your workspace options.

   Ensure that *Display a bitmap image* is selected from the **Workspace backdrop** field.

   Select *BlueStone* from the **Select a bitmap** field.

   Ensure that *Background color* is selected from the **Main menu view** field.

   Select **Light Green**.

3. Specify your environment options.
   a. Select the **Environment Options** tab.
   b. Select the required options.

      Deselect *Expand treeview when selecting folders in right hand pane* from the **Main menu treeview** field.

4. Specify the message options.
   a. Select the **Messages** tab.
   b. Select the required options

Select *Check for messages* from the **On startup** field.

Select *Delete actioned messages that are more than* and select *30* from the **days old** field.

Select *Automatically refresh message inbox every* and select *1* from the **minutes** field.

Select *Display a notification message when new messages arrive.*

5. Specify your graph options.
   a. Select the **Graphs** tab.
   b. Select the required options.

Select **Multiple colors per data point**.

6. Apply your changes.
   a. Select **Apply**.
   b. Select **OK**.

You will need to log out and back in to SYSPRO in order for the changes to take place.

Skins

Skins can be used to change the overall look of the SYSPRO product. You can select to apply a skin from the pre-defined skins menu or create your own skins and apply them.

You can optionally decide to apply the selected skin to the current company. In this way you can have different skins applied to different companies.

User defined skins must be saved in the …base\skinFramework folder on the client machine. You can also save your skins in the …\base\skinFramework folder on the application server and these will be automatically copied to the client machine next time the user logs into SYSPRO.

Skin files are typically suffixed with .msstyle and can be found on various web sites through the Internet.

The skin framework requires an INI file to describe the user interface. These INI files reside beneath the ...\base folder in SkinFramework.

Skin tasks

There are Skin templates available to use or you can create your own skin which represents your company colors and style.

1. You are an iTunes user and like the look and feel of the application. You have viewed the different skin templates and would like to apply the Itunes Skin to your programs for the company you are working in. Do this in the **Personalize** program.
2. Your company has created a skin with the company colors. This user defined skin has been saved as BeOS.msstyles in the Skin Framework folder in the base directory. As System Administrator you have been tasked with applying this user defined skin to SYSPRO. Do this using the Personalize program in the Environment Options tab.
3. If you do not want to continue working with the user defined skin, select the **Office 2007** skin from the **Overall theme for user interface** field.

Adding a skin for a specific company

The following steps describe how to select a theme to be used against the company that you are logged into. This is typically used to make each company you work in visually unique.

1. Open the **Personalize** program (**SYSPRO ribbon bar** > **Home tab** > **Personalize**).
   The **Customize** window is displayed.
2. Select the **Environment Options** tab.
3. Select the theme required at the **Overall theme for user interface** field.

   Select **Itunes Skin** from the dropdown menu.
4. Enable the **Save theme for this company only** option.
5. Apply your changes.

Adding a user-defined skin

The following steps describe how to add your own skin to be applied to the entire user interface.

Ensure that you have saved the personalized skin in `../base/skinframework` on the client machine.

1. Open the **Personalize** program (**SYSPRO ribbon bar** > **Home tab** > **Personalize**).
   The **Customize** window is displayed.
2. Select the **Environment Options** tab.
3. Select the theme that you have created.
   a. Select **{user defined}** at the **Overall theme for user interface** field.
   b. Browse for the skin at the **User defined skin** field.

      Select **BeOS.msstyles** in the **Skin Framework** folder in the **base** directory
   c. Select **OK**.

4. Apply your changes.

The Setup Tab

The Setup tab contains access to setup programs which will be used to configure SYSPRO modules. This configuration will be performed by an implementor and operators should not make changes to these options. However, there are some functions which operators may have access to such as the ability to change their password and setup printers.

Operator passwords

System Administrators will setup passwords against operators and select whether operators have access to changing their password. If operators are allowed to change their password, this is done using the **Change my Password** in (**SYSPRO ribbon bar** > **Setup** > **Passwords**).

Operator password tasks

Your company is improving its security and would like passwords setup for their operators. You will setup passwords for the list of people given below.

Operator	Password
Sandra Holford	finsh01
Pat Webb	adweb66
Gary Aubrey	progar2

1. Add the new password in **Operator Maintenance**.
2. An alternate password can be set up to be used for Electronic Signatures, rather than having to use your login password. In preparation for configuration of eSignatures you will add alternate password for your operators. Start by adding the alternate password sys540 for Sandy Holford. Do this using the **Operator Maintenance** program.

   You can also select to set up your own alternate password. This can be done by logging in as an operator and selecting **Alternate Password** from the **Password** menu (**SYSPRO ribbon bar** > **Setup** > **Passwords**).

Changing an operator password

The following steps describe how to change an operator password.

1. Open the **New Password** program (**SYSPRO ribbon bar** > **Setup** > **Passwords** > **Change My Password**).

   Operators will only be able to change their password if the option **Operators can change their own password** has been selected in the Operator Password Configuration program.

2. Enter and confirm the new password

   Enter *admin* in the **New password** and **Confirm password** fields.

3. Save your changes.

Printing

SYSPRO enables you to produce a diverse range of documents that you need to send to external customers and suppliers (e.g. statements, delivery notes, invoices, order acknowledgements, checks, purchase orders, etc.). SYSPRO also allows you to produce documents for internal use to track the status of transactions (e.g. job cards, warehouse transfers, etc.)

In addition, a number of built-in reports (e.g. management reports, exception reports, master file listings, audit trails, journals, etc.) are available. You can print hard copies of these documents, or preview the information on screen and optionally print hard copies.

Typically, you would use Windows printing to produce these documents. However, SYSPRO caters for other methods such as printing directly to a device, or writing to a disk file.

Several documents (e.g. statements, inventory documents, factory documents, etc.) can also be formatted and printed using MS Word.

You use the **Print Setup** program to configure printers for use within SYSPRO.

If SYSPRO is configured for Windows printing then you can configure the page dimensions and font selections that must be used when printing documents using the **Page Setup** program. This enables you to ensure that details printed on reports generated from within the system fit on the page.

If you selected the option: **Windows Printing** from the SYSPRO ribbon bar, then you can define the margins in either millimeters or inches. This margin unit of measure is defined in the **Regional Settings** of your Window operating system.

SYSPRO includes a print preview facility that you can toggle On or Off using Shift+F4.

When the preview is On the report is always spooled to the server and then presented to the operator a page at a time. The screen preview functions allow you to page forward or backward through the report – even jumping to the last page or to a specific page number. You can search for text (such as a customer name) to make finding the information required quick and easy.

The Windows screen preview is WYSIWYG and provides functions such as a zoom capability, being able to view the report together with its bitmapped background, being able to print a range of pages or a single page.

Printer tasks

Your network has been setup and you have various printers defined. You need to familiarize yourself with the different options available with Windows Printing in SYSPRO.

For the purpose of this task you will log into **Company S**.

1. Using **Page Setup** specify the size, settings and font for the printing.
    a. Select **Landscape** from the Orientation field.
    b. Enter *35* in the **Left** field for the Margins.
    c. Enter *20* in the **Right** field for the Margins.
    d. Change the font size to **8**.
2. You have defined the way you want to print documents by changing page setup options. You have several printers available on the network. You will select a printer to use in SYSPRO. Select the printer you require using the **Print Setup** program.

Defining printer page setup

The following steps describe how to configure page settings for a printer within SYSPRO.

1. Open the **Page Setup** program .

    The **Page Setup** window is displayed.
2.
    a. Specify the size and settings of the page.

        Select *Landscape* from the **Orientation** field.

        Enter *35* in the **Left** field.

        Enter *20* in the **Right** field.

    b. Select **OK** to continue.

        The **Font** window is displayed.
        (**SYSPRO ribbon bar** > **Setup** > **Page Setup**)
3. Select the font you want to use.
    a. Select the font type, style and size.

        Select 8 in the **Size** column.

    b. Select **OK**.

Selecting a printer

The following steps describe how to select a default printer which will be used to print documents generated in

SYSPRO.

1. Open the **Print Setup** program (**SYSPRO ribbon bar** > **Setup** > **Print Setup**).
   The **Print** window is displayed.
2. Select the printer you want to define as the default printer for SYSPRO.

   Select the printer of your choice.

   a. Select **Apply**.
3. Select **Print** to return to the SYSPRO menu.

   The printer that you have selected is displayed on the bottom of the screen.

Print options task

SYSPRO includes a number of printing options such as

- Request Print Dialogue - if you select this option the Print window will display a list of printers from which you can select a printer as well as define the print properties. If it is unlikely you will change these options, deselect this option.
- Windows Printing - this picks up the printers defined on the system.
- Print Preview - select this if you want view a document before you print it.

Ensure all options are enabled.

Enabling print options

The following steps describe how to enable print options in SYSPRO.

1. Naviage to the print options (**SYSPRO ribbon bar** > **Setup**).
2. Enable the Print Dialog.
    a. Select **Request Print Diaglog**.
3. Enable Windows printing.
    a. Select **Windows Printing**.
4. Enable print preview.
    a. Select **Print Preview**.

       You can also use the shortcut **Shift + F4**.

       The status bar has changed. You can select this option by clicking on the status bar where the print preview is shown.

The Query Tab

The Query tab allows quick access to queries within SYSPRO. The query programs are grouped logically making them easy to find and launch. Operators will find the **Quick Find** program useful as they can perform a detailed search on various categories of information within SYSPRO.

Quick find task

You have been asked to find the back order quantity for a sales order but all you have been given is a customer purchase order number BB781. This is not an issue for you as you can use the **Quick Find** program to find the information you are looking for.

Using the Quick Find program

The following steps describe how to use the Quick Find program to query information not easily found in standard Query programs.

1. Open the **Quick Find** program (**SYSPRO ribbon bar** > **Query** > **Quick Find**).
2. Enter the value is the related field.

   Enter *BB781* in the **Sales Orders** field.

3. Select the key by which you want to search.

   Select **Customer p/order**.

4. Select your preferences.

   Select **Case sensitive** in the **Preferences** field.

5. Search for the entry.
   a. Select **Search**.

   Matching values will be displayed.

6. Highlight the matched value and select the required query.

   Highlight sales order **792**.

   Select **Detail Lines for Sales Order**.

   You will see the back order quantity is **110**.

The Import Tab

The Import tab contains the programs which allow you to import data from thrid party application or flat ASCII files. These programs are listed in the applicable discipline Financial, Discribution and Maufacturing.

The SYSPRO Button

The SYSPRO button, located in the top left-hand corner of the SYSPRO menu, consists of seven commonly used functions. This allows you to perform tasks quickly from the menu.

- **New**: provides a list of programs which users can access and launch provided they have access to the programs. It is a quick launch function whereby operators can add data such as a new customer, supplier, contact or job.
- **Switch Company**: allows you to switch between companies without having to close SYSPRO.
- **Company Date**: allows you to change the company date, if required for processing purposes.
- **New SYSPRO Instance**: launches another instance of SYSPRO and allows the user to work in more than one company concurrently on different interfaces.
- **Run a Program**: allows the user to launch a SYSPRO program using the program name. If you know the program name, then you can quickly launch the program without having to navigate through the menu.
- **Run Last Program**: launches the last SYSPRO program the user used.

Run tasks

You have been told that you can use the Run command to run any SYSPRO program and that you can pass parameters to these commands. You want to test this out. In order to use this you do need to know the program name i.e Customer Query is ARSPEN and WIP Period End is WIPP01.

1. Using the **Run** program open the Customer Query program and query Bikes and Blades South. To view the customer as the program opens enter *ARSPEN 0000003* in the **Program to run** field.
2. You have accidently closed the program you were just working in, rather than navigating through the SYSPRO menu use the **Run Last Program** option to relaunch the program.

Running a SYSPRO program

This task enables you to launch a SYSPRO program in SYSPRO.

1. Open the **Run** program (**SYSPRO button** > **Run a program**).

   The **Run SYSPRO Program** window is displayed.

2. Run the required program.
   a. Enter the name of the SYSPRO program you want to launch.

      Enter *ARSPEN 0000003* in the **Program to run** field.

   b. Select **OK**.

   The program window is displayed.

Running the last program run

The following steps describe how to launch a SYSPRO program in SYSPRO without using the SYSPRO Main Menu.

1. Run the last program you ran and closed.
   a. Select **Run Last Program** from the **SYSPRO button**.

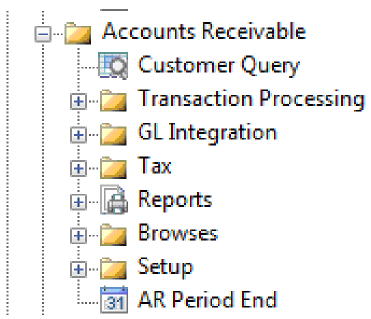
      Alternatively select **Ctrl+L**.

   The last program you ran will open.

Menu Navigation

The SYSPRO Main Menu lists the modules which your company has purchased. The default menu will display modules grouped by discipline; first Financial, followed by Distribution and Manufacturing.

Each module has a default structure:



1. **Query** programs
2. **Transaction Processing** folder

   This folder contains the programs required to post transactions.

3. **GL Integration**

   To cater for Real Time General Ledger, the General Ledger and all sub ledgers contain a GL Integration folder with programs used for integration and reporting.

4. **Tax** sub folder

   The Financial modules now have a folder called **Tax** which contains setup and processing programs as well as reports related to tax.

5. **Reports** folder

   This folder contains all the reports which can be run for the module. SYSPRO Reporting Services will also contain these reports.

6. **Browses** folder

   For each module, the **Browses** folder contains programs where you can browse for, add and maintain data.

7. **Setup** folder

   For each module, the **Setup** folder contains programs where data can only be added and deleted.

8. **Period End** program

   Programs which require balancing and period ends to be run will have this program in their folder.

Toolbars

Toolbars provide single-click access to selected program functions.

SYSPRO toolbars help you to access the most commonly-used options from the menu bar.

For example, the main SYSPRO menu includes toolbar options to switch between the various available menus. In addition, the toolbar included in browse-style programs enables you to easily add, change and delete entries.

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.

Toolbar addition task

In toolbar customization you can create your own menu which you select to display. You often work in **Inventory Query** and only use the **Stock code** field and **Browse** button. You very rarely use the other toolbar options. Instead of customizing the existing toolbar, you would rather add your own toolbar, drag and drop the Stock code field and Browse button onto the toolbar and then deselect the Inventory Query toolbar. Call your new toolbar *My Toolbar*.

Adding a toolbar

The following steps describe how to add a new toolbar and toolbar icons to a program window.

1. Open the program to which you want to add a new toolbar.

   Open the **Inventory Query** program (**SYSPRO Main Menu** > **Inventory** > **Inventory Query**).

2. Open the toolbar customization program.
   a. Right-click anywhere on the toolbar and select **Customize**.

   The **Customize** window is displayed.

3. Select **New**.
4. Enter the new toolbar details.
   a. Add a name for the toolbar.

      Add *My Toolbar* in the **Toolbar name** field.

   b. Select **OK**.

5. Add the required function to your new toolbar.

   Drag and drop the **Stock code** field to the new toolbar.

   Drag and drop the **Browse** button to the new toolbar.

   Deselect **Inventory Query**.

6. Select **Close**.

   You should only see the Stock code field and the Browse icon displayed.

Summary

By completing this chapter you learnt

1. The SYSPRO ribbon bar contains icons representing the various functions available in SYSPRO. The functions are grouped together by tabs. You can personalize the desktop using the Personalize program on the Home tab, setup printers on the Setup tab and use the Quick find on the Query tab.
2. How to create a favorites menu.
3. How to change the look and feel of SYSPRO using the Personalize program.
4. How to change printer options.
5. How to add or change an operator password.
6. Using the SYSPRO button you can launch new programs which allow you to add data, such as new customers, suppliers, contacts and jobs. You can switch companies and run another instance of SYSPRO. You can also run a SYSPRO program from this list. Finally you can change the company date if you have permission to do so.

User interface of a SYSPRO program

Chapter
2

Objectives

In this chapter you will learn the terminology used for the components which make up a SYSPRO program. You will also learn how you can customize a form within a program.

By the end of this chapter you should be able to

1. Differentiate between a window, pane, display form, entry form, field, listview and docking pane.
2. Customize a form using the context sensitive menu.
3. Customize listviews.
4. Move and dock panes to the required position in SYSPRO.

SYSPRO Programs

Windows

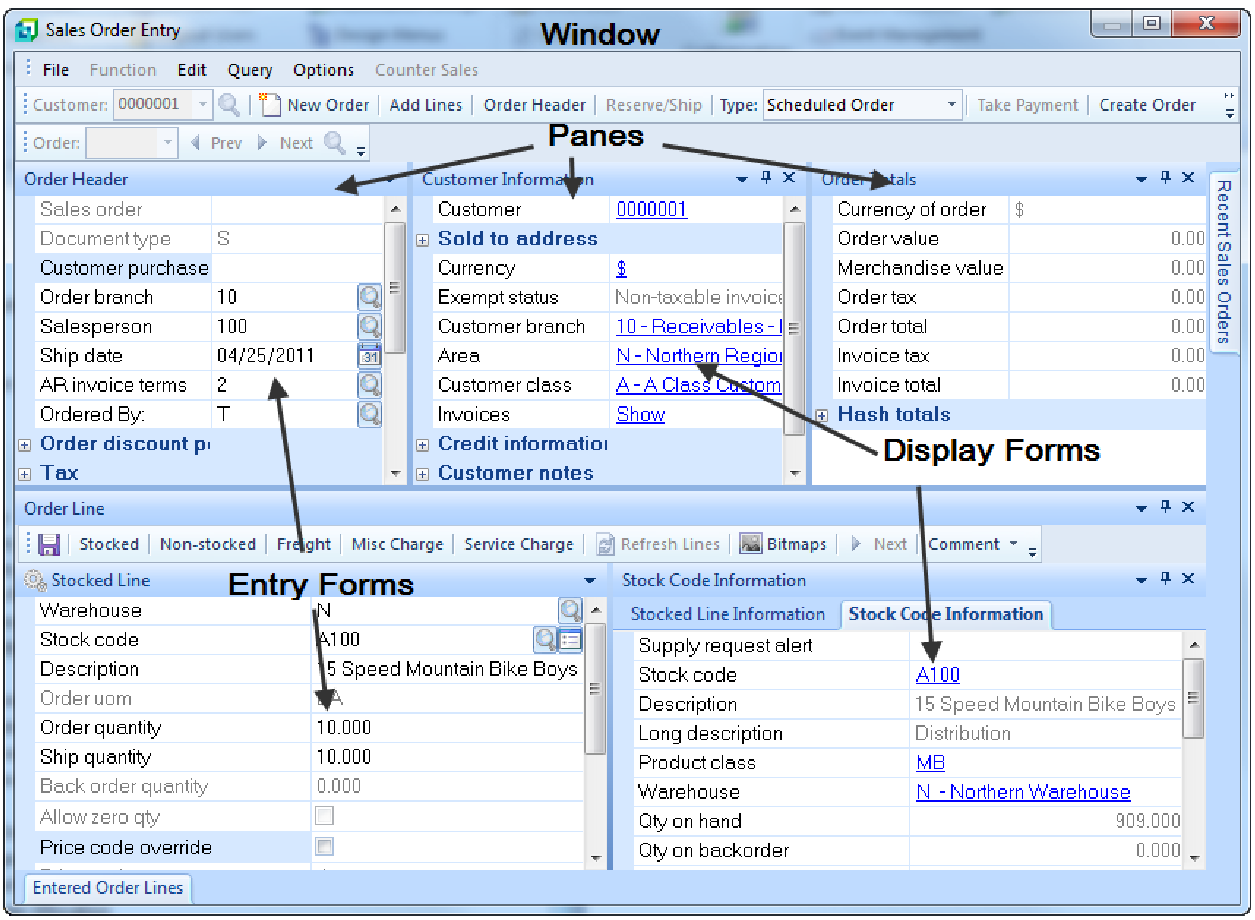
A window in SYSPRO represents the whole screen and is divided into a number of areas called forms.

You can tailor how you want to display information within SYSPRO as well as how you want to capture information within the traditional data entry screens.

You can resize the entire window and splitter panes allow you to resize individual form windows.

While the size and position of a window is stored as an absolute value, forms are stored as a percentage of the window's horizontal and vertical size. Subsequent resizing of a window adjusts the size of the form, but the form retains its proportional dimensions.

In the case of windows that contain more than one row of forms, resizing the width of a form affects other forms in the same row, but does not affect the size of a form in another row.



Forms

Forms can be display forms or entry forms.

A display form refers to a form that only displays information (i.e. you cannot add or maintain data within a display form). However, you can add a custom form or scripted field to a display form.

An entry form refers to a form that contains fields against which you can change values.

Forms can be customized depending on how you want to represent information on the screen, as well as how you want to capture information within the traditional data entry screens. You will be able to add or remove functionality from forms to meet your business requirements without requiring any development tools or VBScripting.

Highlights include:

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

Context sensitive menu

A context-sensitive menu is displayed when you right-click on a form, field or listview header. This allows you to perform various functions against the forms and listviews, such as changing the attributes, moving fields, filtering rows and much more.

Fields

Fields appear on forms and typically comprise a caption and matching value. Fields, and field groups can be moved on a form, allowing you to position them in a sequence that you would like them to be presented. You can also remove the fields that are not required.

You right-click on a field and select **Field Properties** from the context-sensitive menu that is displayed to change the attributes of the field.

You right-click on a field and select **Field Properties for all Forms** to change the field attributes and apply them to all the forms in which the field is used.

By default only the most commonly required fields appear on forms. However, you can add fields from the primary table (using a field chooser) or add your own custom fields to a form using scripting.

Certain fields are mandatory, and at least one field must be present on a form.

Field properties tasks

When you select a field you can define the properties for that field which include:

- changes to the caption
- appearance of data
- behavior of the field
- ability to add icons and tooltips

This helps you change the fields according to how you would like them to make your day-to-day processing easier.

1. You will customize the **Sales Order Query**. The first field you will start with is **Order status**. You want to ensure that the status is clearly displayed by having the background in red and the text in white. Also, you would like the **Sales order** field to stand out. You will make the following changes:

Field	Customization
Sales Order	
Caption	Order number
Caption Height	50
Caption Theme	Studio
Icon	Sales order

If you are unhappy with your changes you can always open the **Field properties** program and select **Reset Field**.

2. You have recently customized your **Sales Order Query** however you will be away on maternity/paternity leave and will need to reset your forms for the temporary staff performing your duties. Reset the form **Order Header** form.

Changing properties for a field

The following steps describe how to make changes to a field in a form.

1. Open the form you would like to maintain.

   Open the **Sales Order Query** program (**SYSPRO Menu** > **Sales Orders** > **Sales Order Query**) .

   Navigate to the **Order Header** form.

2. Right-click on the required field on the form.

   Right-click on **Order status**.

3. Select **Field Properties** from the context menu.
4. Change the field properties.

   Select *Red* in the **Background color** field in **Appearance of Data**.

   Select *White* in the **Foreground color** field in **Appearance of Data**.

Select **Next Field**.

Enter *Order number* in the **Caption** field.

Enter *50* in the **Height** field under **Appearance of Caption**.

Select **Studio** in the **Theme** field under **Appearance of Caption**.

Select the **Sales order** icon in **Icon** field under **Button**.

5. Select **Close**.
   The new text is displayed in the form.

Resetting a form

The following steps describe how to restore a form to its original state.

1. Open the form you would like to maintain.

   Open the **Sales Order Entry** program (**SYSPRO Menu** > **Sales Orders** > **Transaction Processing** > **Sales Order Entry**).

   Select the **Order Header** form.

2. Reset the form.
   a. Right-click on any field on the form.
   b. Select **Reset Form** from the context menu.
   c. Select to **Restore captions only** or to **Reset the form**.

      Selecting **Restore captions only** will restore all captions for the form, and place them in their default sequence. Selecting **Reset the form** will remove all changes made to the form.

      Select **Reset the form**.

   d. Select **OK**.
      The form is now reset.

Field properties for all task

The **Field Properties for All Forms** program allows you to change the name of a caption which will be applied to all forms, not just the one in which you are working. Also you can add Help information and an input mask to ensure the operators enter data correctly.

Management has decided to change the caption name **Stock code** to *Part Number*. You will use the **Field Properties for All Forms** program to enter this change. Also add Help information "*This refers to the code for the inventory items on file*."

Finally you want to add an input mask to ensure that the part numbers are entered correctly. Use the following mask which will ensure that part number begins with an uppercase letter (alpha) and is followed by three numerics:

_>_0_0_0

- The underscore '_' denotes the position of the character in the mask.
- The '>' symbol ensures letters are converted to uppercase.
- The '0' indicates that only numerics can be entered here.

Once you have done this, open the **Inventory Movements** program and try to enter a number or two alphas in the **Part number** field. You will see the field will not allow you to do this.

In order to prevent error in subsequent tasks, open the **Field Properties for all Forms** program and delete the entry.

Changing properties for all fields in a form

The following steps describe how to change the field properties and apply these changes to all forms in which that field resides.

1. Open the form you would like to maintain.

   > Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**) .
   >
   > Navigate to the **Stock Code Details** form.

2. Right-click on the required field on the form.

   > Right-click on **Stock code**.

3. Select **Field Properties for All Forms** from the context menu.
4. Change the field properties.
   a. Select **New**.
   b. Enter the new field properties.

   > Enter *Stock code* in the **Caption** field.
   >
   > Enter *Part Number* in the **New Caption** field.
   >
   > Enter *This refers to the code for the inventory items on file* in the **Help text** field.
   >
   > Enter *_>_0_0_0* in the **Input mask** field.

5. Select **Save**.

   > Exit the program.

Open the **Movements** program (**SYSPRO Menu** > **Inventory Transaction** > **Processing** > **Movements**).

Stock code is now Part Number.

Enter *123* in the **Part Number** field.

You will find you cannot do this.

Exit the program.

Resetting form tasks

After personalizing a program, you might find that there are forms or fields missing. In SYSPRO it is easy to view what forms there are in a program and which forms are available but not being displayed. You can also reset all forms if you need to.

1. Open the **Inventory Query** program.
    a. Close the **Production** form.
    b. Select to display the list of available forms.
    c. Reset the forms so that you can view them in the program.

Restoring a form

These steps describe the procedure you must follow to restore a window to its original settings.

You must have completed the task Closing a form.

1. Open any window in SYSPRO that contains forms.

    Open the the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

2. Restore forms on the window.
    a. Click on the form title dropdown menu.

        You can do this from any form.

    b. Select **Reset Layout for this Application** from the **View Panes** menu option.

    The window is restored to its original settings.

Options task

In addition to the Field Properties selections, there is a list of options which you can use to apply to the whole form rather than just a field.

As the Receivables clerk you work daily in the **AR Invoice Posting** program. You are tired of the standard look and feel of the program and want to personalize the forms. You have decided that you would like to:

- always display the browse buttons rather than them appearing only once you have selected the field.
- display the captions in bold and set the caption background color to green
- highlight the editable fields so you can see where you are able to enter data
- display the numerics in the center of the cell

Use the **Options** list to select these.

Personalizing the form using options

The following steps describe how to personalize the form using the selections in the Options list.

1. Open the form you would like to maintain.

   Open the **AR Invoice Posting** program (**SYSPRO Menu** > **Accounts Receivable** > **Transaction Processing** > **AR Invoice Posting**).

   Select the **Document Entry** form.

2. Open the list of options to help you personalize the form.
   a. Right-click on any field in the form field.
   b. Select **Options**.

3. Select the required options to suit your preferences.

   Select **Always Show Buttons**.

   Select **Show Caption in Bold**.

   Select **Light Green** from the **Captions Background Color** options.

   Select **Highlight Editable Fields**.

   Select **Center** from the **Alignment for Numerics** list.

4. Exit the program.

Listviews

A listview is an area on a screen that displays a table of items in pre-defined columns and rows, where each item is shown as a row in the table and each column shows the values associated with the item.

It is typically resizable and the columns can be dragged to appear in a different sequence. The width of the individual columns can be changed by dragging the vertical bar between the column headings. Alternatively, you can make a column default to the maximum width of the data within the column by double-clicking on the vertical bar immediately to the right of the column's heading.

Listviews are used throughout SYSPRO to display information. For example: the **Stock Codes** browse program shows one row for each stock item and the columns include information such as the **Stock code**, **Description**, **Mass**, **Unit of measure**, etc.

Each operator can customize the look-and-feel of a listview. For example: you can change column widths, re-sequence columns, change fonts and colors, etc. Changes are saved as preferences against the operator.

In addition, selected listviews allow more sophisticated customization. These listviews have pre-defined categories to which you can assign a style. A style includes the foreground color, background color and font. When the listview is shown, each row is displayed with the appropriate color and font.

For example: The **Job Logging** program enables you to assign a style to each of the following categories: Failed programs, Failed transactions, File errors and Active programs. This allows you to visually highlight these exceptions.

Some listviews have additional features. Press *Ctrl+F1* to view the full list of functions available in that listview.

Advanced listviews are an extension of the standard listviews provided within SYSPRO. They allow for the display of more information and include the facility to highlight anomalies and interact with other applications. The displayed information can be filtered, grouped, printed, emailed and columns can be frozen for easier viewing when looking at long rows of data.

Listview configuration task

You can use the **Customize** program to apply options to all listviews in the system.

You would like operators to clearly see which listview cells are disabled. In the **Customize** program, enable the lock icon to display on disabled listview cells. Once enabled, you can see an example of these lock icons in the General Leger Entry program.

Adding a lock icon to disabled listview cells

The following steps describe how to identify a disabled cell with a lock icon. This allows you to see at a glance, which cells are disabled.

1. Open the **Personalize** program (**SYSPRO ribbon bar** > **Home tab** > **Personalize**).
   The **Customize** window is displayed.
2. Select the **Listviews** tab.
3. Enable the **Show lock icon for disabled listview cells** option.
4. Apply your changes.

   Open the **General Ledger Entry** program (**SYSPRO Main Menu** > **General Ledger** > **Transaction Processing** > **General Ledger Entry**).

   Enter *20* in the **Journal** field.

   Select the **Go** icon.

   You will see the lock icons in the disabled cells in the Journal Details tab.

   You can view the lock icon on all the disabled cells.

Filtering task

In the **WIP Query** you are querying job *140*. You are looking for information related to material transactions for stock code **B1209**. There has been a query about the quantity issued for this item. In order to find the information quickly, filter the listview by the stock code column and select B1209 from the drop-down menu. This will display the required information quickly and clearly.

Filtering a listview by column

The following steps describe how to filter data in a listview by a column. Filtering by column allows you to easily find rows for a selected value.

1. Open the listview you want to maintain.

   Open the **WIP Query** program (**SYSPRO Main Menu** > **Work in Progress** > **WIP Query**).

   Enter *140* in the **Job** field.

   Select the **Material Transactions** tab.

2. Right-click on a column header.
3. Select **Filter by column**.
   A header row is inserted into the listview and a drop-down option becomes available in the cells below each column header.
4. Select the required value from the drop-down button in the column that you would like to filter.

   Select **B1209** from the **Stock code** column filter.

   Select **Enter**.

   Only those records matching the selected value are displayed.

   Remove the filter function by deselecting the **Filter by column** option.

Autosum tasks

You are now going to use the Autosum options in order to display required information in your listviews. These options have similar functionality to Excel in that you can add up column totals, count rows, calculate the column average and group totals.

You will see these functions using the **Inventory Query** program.

1. You want to view the total of the inventory movements transaction values for stock code *A100*. Do this using the **Autosum** option **Column Sum**.
2. You would also like to display the number of rows you have on display. Enable your **Row Count** option in Autosum. Then, select the option **More lines** to see the change in the row total as well as the transaction value total.
3. Next you want to see the average quantity for the number of rows displayed. Use the **Column average** option in Autosum to find out the average quantity.
4. In order to use the Group totals option in autosum, you need to create groups. Group your columns by **Transaction type**.
5. You would like to see the group totals for the transaction types. Use the Autosum **Group totals** option to view the sub totals.

Adding up column values in a listview

The following steps describe how to add up the values in a numeric column using the Autosum function.

Automatic summing and averaging can be applied to numeric columns only.

1. Open the listview you want to maintain.

   Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

   Enter *A100* in the **Stock code** field and **Tab**.

   Select the **Movements** tab.

2. Right-click on the column header for the field with values/numeric.

   Right-click on **Transaction values**.

3. Select **Autosum**.
4. Select **Column Sum**.
   The value of the sum is shown in the report footer for the selected column.
   You remove any summed column by clicking on the checked item, or you can remove all summed columns by selecting the Remove All menu item.

Performing a row count

The following steps describe how to add a total to a column indicating how many rows are in that column.

1. Open the listview against which you want to perform a row count.

Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

Enter *A100* in the **Stock code** field and **Tab**.

Select the **Movements** tab.

2. Right-click on the column heading that you would like to count.

   Right-click on any column.

3. Select **Autosum**.
4. Select **Row Count**.

   To see the row count change, select **More Lines** in the Toolbar.

   The total number of rows is displayed in the listview footer.

Displaying the column average

The following steps describe how to add up the average of the values in a numeric column.

1. Open the listview you want to maintain.

   Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

   Enter *A100* in the **Stock code** field and **Tab**.

   Select the **Movements** tab.

2. Right-click on the column header with quantities/numerics.

   Right-click on the **Quantities** column.

3. Select **Autosum**.
4. Select **Column Average**.
   The column average is displayed in the listview footer.

Grouping data in a listview by field

The following steps describe how to change the display of data in a listview by using the **Group By This Field** option.

1. Open the listview you want to maintain.

   Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

   Enter *A100* in the **Stock code** field and **Tab**.

   Select the **Movements** tab.

2. Right-click on the column header to be grouped.

   Right-click on **Trn Type** (Transaction Type).

3. Select **Group By This Field**.

   The sequence of the data displayed within the listview is changed. The column heading that was selected appears above the others.

   If you no longer want the display grouped by the subgroup you can drag the subgroup's column heading back to the other headings. Two red arrows will show where this heading will be inserted when it is released.

Adding a total to groups in a listview

the following steps describe how to display subtotals at the change of each group.

Ensure that you have grouped the listview data to use this function.

1. Open the listview you want to maintain.

   Open the **Inventory Query** program (**SYSPRO Menu** > **Inventory** > **Inventory Query**).

   Enter *A100* in the **Stock code** field and **Tab**.

   Select the **Movements** tab.

2. Right-click on a column header.

   Right-click on any header.

3. Select **Autosum**.
4. Select **Group Totals**.

   Totals are shown on change of the grouped field in bold.

   The columns that are subtotaled are the ones selected in the Autosum Columns option.

   The word ‘Subtotal:’ is printed in the first column of the subtotal record.

   You only can produce subtotals if a single column is grouped.

Conditional formatting tasks

Along with being able to highlight the top 10 and bottom 10 values in a column, you can also apply advanced conditional formatting. This allows you to specify rules which are applied to rows or cells within a list view.

You are going to apply some advanced conditional formatting to the **Customer Query**.

1. In the **Invoices** tab you want to display credit notes (C/N) in the **Transaction Type** column with a red cell background in order to highlight them better. Call this rule the *Invoice rule*.
2. In the **Movements** tab you would like any sales amounts equal to or below 5000.00 to be displayed with a yellow row background. Add a tooltip for this saying "*Amount lower than 5000*". Call this rule *Low sales* rule.
3. In the **Sales Orders** tab you want to hide any sales order with a status of 9. As you do not want to view complete orders. Call the rule *Status* rule.

Adding advanced conditional formatting to a listview column

The following steps describe how to perform sophisticated cell and row formatting to highlight exceptions using advanced conditional formatting.

1. Open the listview you want to maintain.

   Open the **Customer Query** program (**SYSPRO Menu** > **Accounts Receivable** > **Customer Query**).

   Enter *000001* in the **Customer** field.

   Select the **Invoices** pane.

2. Right-click on any column header.

   Right-click on any column.

3. Select **Conditional Formatting**.
4. Select **Advanced**.
5. Add the conditional rule.
   a. Select **Add Rule**.
   b. Enter the rule requirements.

      Enter *Invoice rule* in the **Rule name** field.

      Select **Type** from the **Rule applied to column** drop-down menu.

      Select **contains** from the **Format cells where cell value** drop-down menu.

      Enter *C* in The **Value 1** field.

      Select **Case sensitive**.

      Select **Red** from the **Cell background color** selection.

   c. Select **Apply** to see the effect of the new rules on the listview being formatted.

6. Save your changes.

   Select the **Movements** tab.

   Open the **Advanced Conditional Formatting** program.

   Select **Add Rule**.

   Enter *Low sales rule* in the **Rule name** field.

   Select **Original amount** from the **Rule applied to column** drop-down menu.

   Select **is less than or equal to** from the **Format cells where cell value** drop-down menu.

   Enter *5000* in The **Value 1** field.

   Select **Yellow** from the **Cell background color** selection.

   Enter *Amount lower than 5000* in the **Tooltip** field.

   Select **Apply and Exit**.

   Select the **Sales Orders** tab.

   Open the **Advanced Conditional Formatting** program.

   Select **Add Rule**.

   Enter *Status* in the **Rule name** field.

   Select **Status** from the **Rule applied to column** drop-down menu.

   Select **equals to** from the **Format cells where cell value** drop-down menu.

   Enter *9* in The **Value 1** field.

   Select **Hide row**.

   Select **Apply and Exit**.

7. Exit the program.

Optimized listview tasks

If you have many thousands of records to be shown it can take some time to populate the listview. In 6.1 some listviews have been optimized to improve the performance of populating a listview. The optimization has been achieved by populating only columns that are visible in the list view; the fewer columns that are visible the faster the population time. To make a column not 'visible' just remove the column from the list view.

1. As your company does contain many records and you would like information to be displayed at a faster rate. Optimize your list views in **Inventory Query** by removing columns in the **Movements** tab. Remove the following columns:

1	Customer Name	You can identify the customer by the number
2	Area	You can identify the area by the branch
3	Bin location	You do not use bins

2. To indicate the optimized list view, go to the **System Wide Personalization** program and select **Indicate Optimized List views**. Also, select the **Green Diamond** icon to indicate this. You must then log in and out of SYSPRO, open **Inventory Query** to see the effects of this selection.

Removing columns from a listview

The following steps describe how to remove columns that you no longer require.

1. Open the listview you want to maintain.

   Open the **Inventory Query** program (**SYSPRO Main Menu** > **Inventory** > **Inventroy Query**).

   Select the **Movements** tab.

2. Move the mouse pointer over the column you want to remove and drag it onto the main part of the listview.

   Remove the following colum headers; **Customer Name**, **Area** and **Bin Location**.

   As soon as the column leaves the area occupied by the column headings, the mouse pointer turns into a large X.

3. Release the heading.

   It will be removed from the column heading area.

   If you put the heading back before releasing it, it will be returned to the column heading area.

   You can also right-click on the heading and select **Remove This Column** from the context menu.

   The column headings that have been removed from the column heading area are available to be replaced. They are held in the **Field Chooser**.

Identifying optimized listviews

The following steps describe how to determine which listviews have been optimized.

1. Open the **System-wide Personalization** program (**SYSPRO ribbon bar** > **Home tab** > **Customization Tools** > **System-wide Personalization**).

   The **System-wide Personalization** window is displayed.

2. Enable the **Indicate optimized listviews** option. found in the Listviews group.
3. Select an icon to identify the optimized listviews.

   Select the **Edit Icon** link.

   Select **Diamond Green**.

4. Select **OK**.
5. Select **Save and Exit**.

   Log out and back in to SYSPRO.

   Open **Inventory Query** and select the **Movements** pane.

   The icon is displayed against the optimized listviews.

   When you decide to add back columns that were previously removed from the listview then you will notice that the column values are blank until such time as the list view gets refreshed.

Additional listview tasks

The following tasks are additional new features applied to listviews which were not covered in the tasks with scenarios and tutorial information. We have added them to make you aware of the additional functions applied to listviews.

Removing shading from a sorted column

The following steps describe how to remove the shading that occurs on a sorted column. By default when a column in a listview is sorted that column is also shaded, allowing you to view at a glance if a listview has been sorted, and by which column.

1. Open the **Personalize** program (**SYSPRO ribbon bar** > **Home** > **Personalize**).
   The **Customize** window is displayed.
2. Select the **Listviews** tab.
3. Deselect the **Shade sorted columns** option.
4. Apply your changes.
   The column is no longer shaded when sorted.

Adding more lines to a listview

The following steps describe how to display more lines on a listview.

1. Open the listview you want to maintain.
2. Right-click on the pane title.
3. Select **More Lines**.

> The number of lines or rows displayed depends on the number you have entered in the **Rows** field. If the **Rows** field is not displayed. Right-click on a column header and select **Adjust Rows to Display**.

Shading group headings

The following steps describe how to choose shading for the groups and subgroups on a listview. This is typically used to assist in viewing where the groups and subgroups start and finish.

1. Open the listview that you want to maintain.
2. Right-click on a listview column header.
3. Select **Customize**.
4. Select **Shade Group Headings**.
   When these are checked the lines containing the group and subgroup headings are colorized.

Changing a column heading to display multiple lines

The following steps describe how to display the entire text in a column heading if truncated/not word wrapped.

1. Open the listview you want to maintain.
2. Right-click on the column header.
3. Select **Multi-line Headings**.

   The truncated column headings are displayed in full.

Removing sorting from the listview

The following steps describe how to remove any sorting from a listview.

1. Click on the column heading to display the contents of a listview in the sequence of that column.

   The data is sorted in ascending order by the contents of that column, and a small triangle appears against the column heading.
2. Click on the same column heading again to change the sequence to descending.
3. Select **Clear Sort Items** from the listview to return the data to the original state.

Docking Panes

Docking panes are forms that can be moved to different positions on the screen. These forms can be configured to float on their own, or contract to a tab so that more application workspace is available for other forms. If the window cannot show all the auto hidden tabs then a scroll button will be shown allowing you to scroll up or down the auto hidden panels.

Forms that have been contracted down to tabs will expand when the mouse pointer is positioned on them.

You can close forms completely thereby reducing load on the workstation.

You can change the appearance of the docking panes by adding opacity which allows you to view forms behind any floating panes.

You can change a pane from a docking pane to a window giving it a 'windows' feel, and add a maximize button allowing you to expand a form to fill the space used by the adjacent forms.

Panes can be resized using a splitter bar that is activated when the mouse pointer moves over it.

You can maintain the position of the tabs on a pane, as well as change a tabbed pane to a form.

These options can either be defined in the **Personalize** program (**SYSPRO ribbon bar** > **Home** > **Personalize**) or on the pane itself.

If roles are in use the docking pane menu button is hidden and there is no specific menu associated with the docking pane.

Docking stickers task

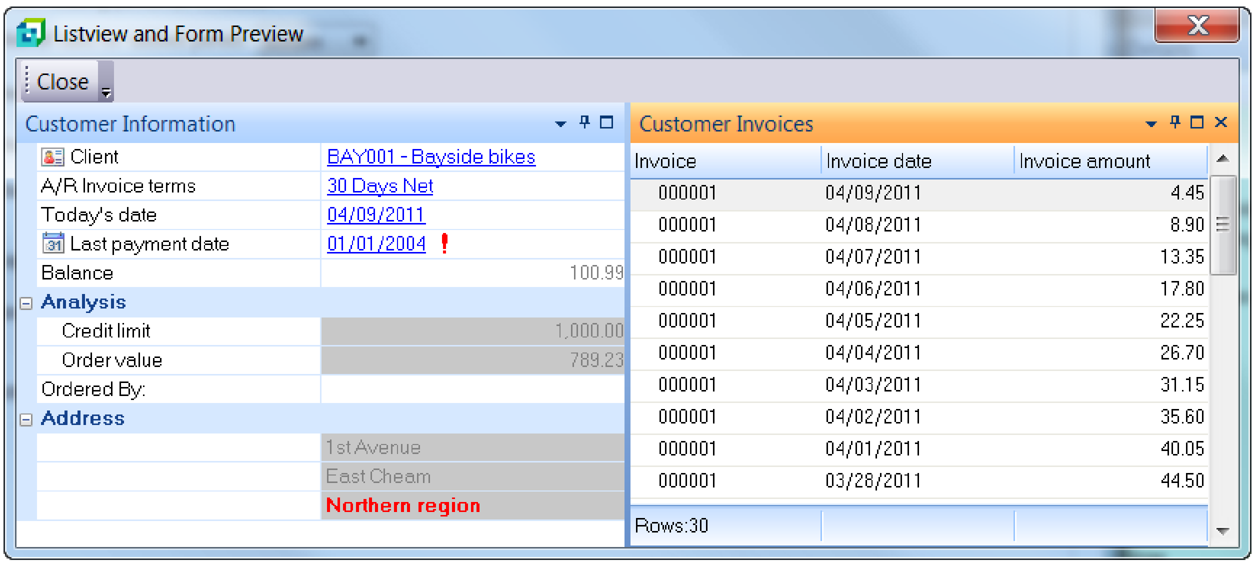
The steps which follow provide information on how to use docking stickers.

Moving forms using docking stickers

These steps describe how to move forms within a window using docking stickers.

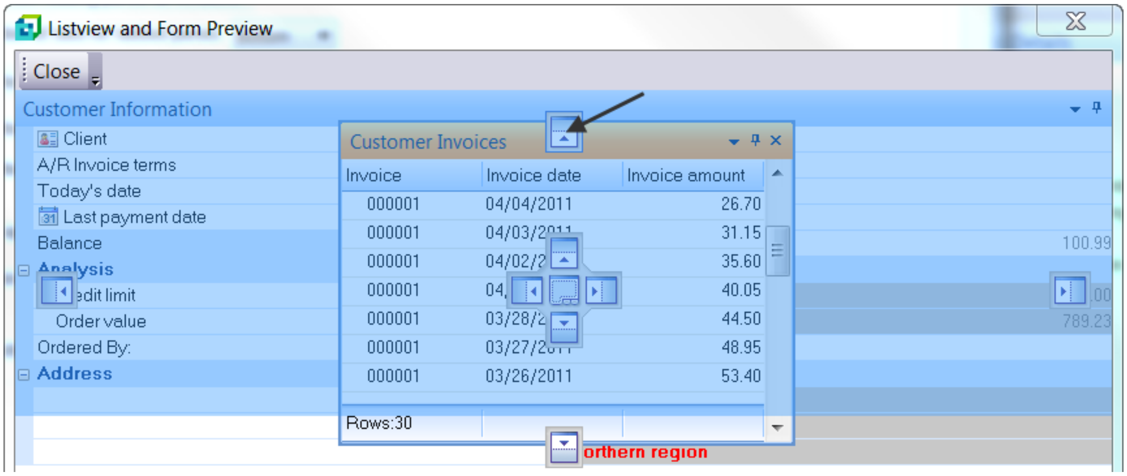
The simplest example to show how docking stickers are used can be seen when using the **Preview** option on the **Docking Panes** tab of the **Customize** program (**SYSPRO ribbon bar** > **Home** > **Personalize** > **Docking Panes** > **Preview**).

The preview window contains two forms, **Customer Information** and **Customer Invoices**.



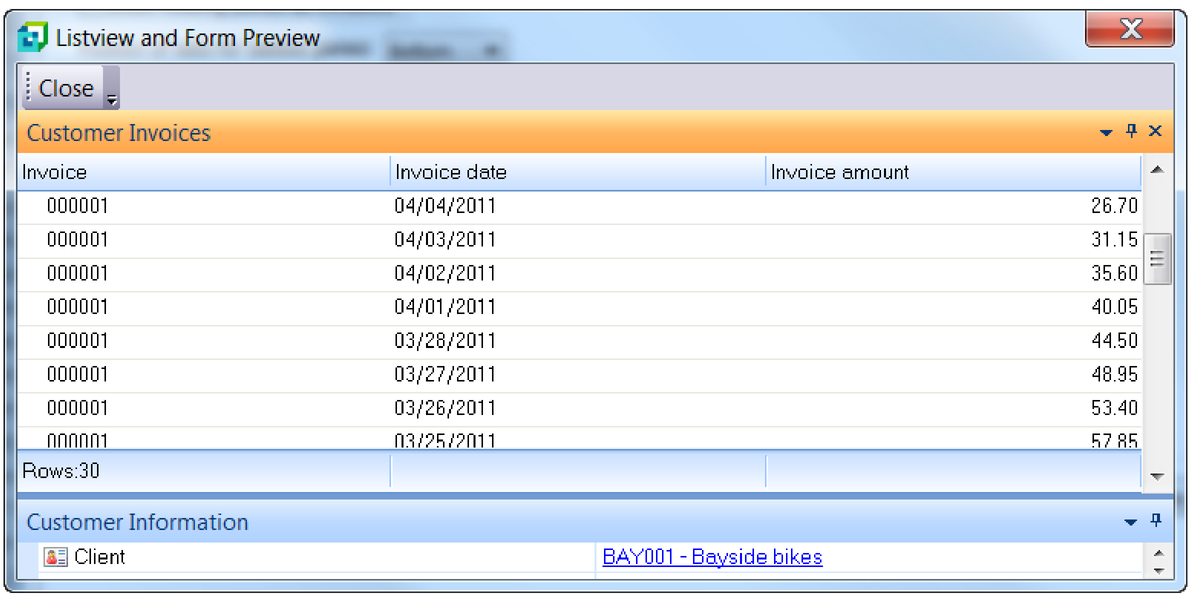
1. Move the form to the top of the window.
    a. Drag the **Customer Invoices** form by its title bar away from its location.
    b. Place the title bar over the upper most docking sticker.

    The area at the top of the screen will become blue, showing that the form would appear at the top of the window.

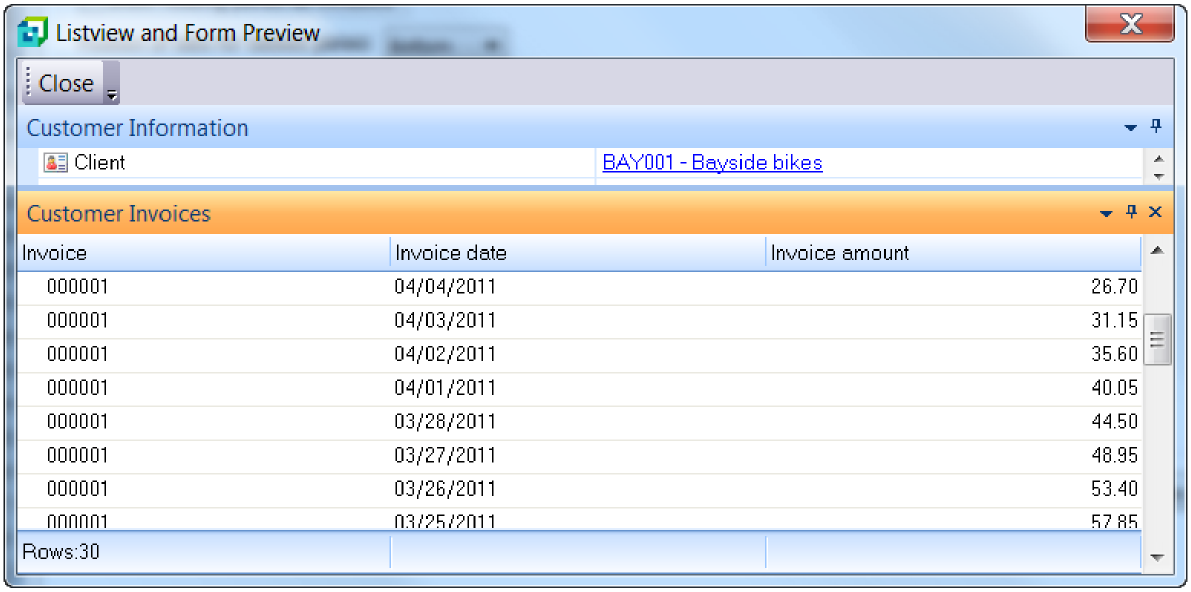


c. Release the **Customer Invoices** form.

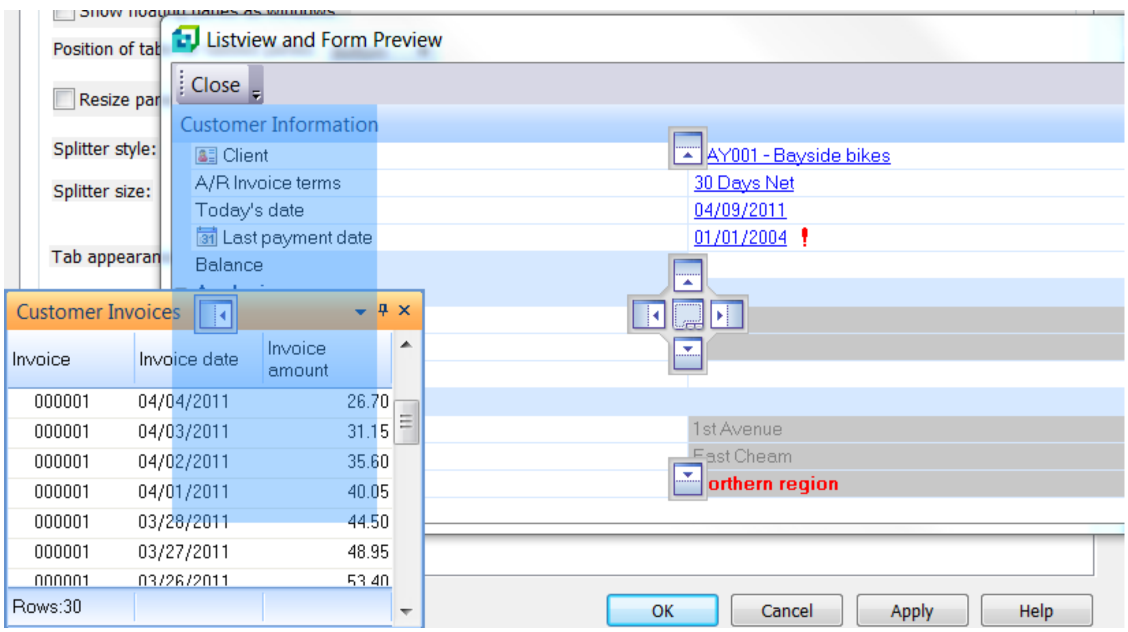
The form appears above the **Customer Information** form, and takes up nearly all the form, with the **Customer Information** form's title bar appearing right at the bottom. You can use the splitter between the two forms to adjust their sizes.



If you move the form to the bottom most docking sticker, the **Customer Invoices** form will appear as the lowest form, taking up most of the screen, but with the **Customer Information** form's title bar above it.



2. Move the form to the left of the window.
   a. Drag the **Customer Invoices** form by its title bar away from its location.
   b. Place the title bar over the far left docking sticker.
   The area to the left is highlighted in blue.



   c. Release the form.

The form appears at the far left of the window.

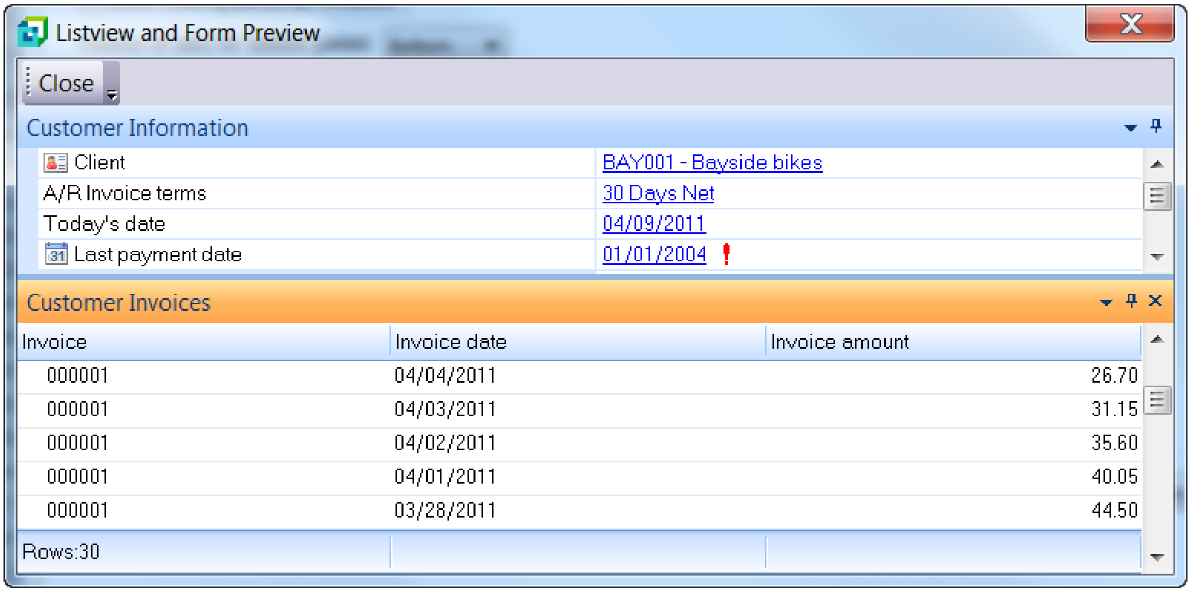
3. Move the form to the top half of the window.

a. Drag the **Customer Invoices** form by its title bar away from its location and place it over the uppermost part of the inner docking sticker.

   The area at the top of the screen will become blue, showing that the form would appear at the top half of the window.

b. Release the form.

The **Customer Invoices** form appears at the top of the window, but only takes up half the available space.



This highlights the difference between the inner and outer docking stickers.

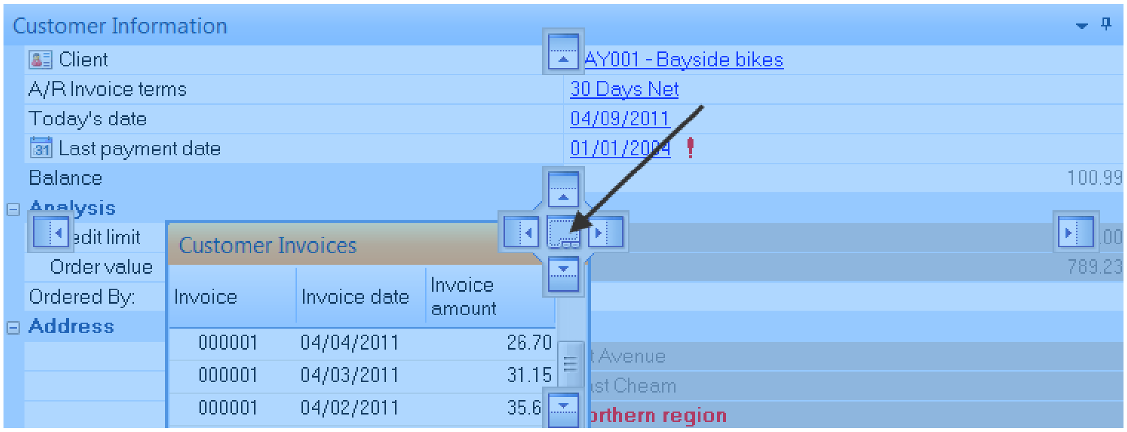
Dragging the form over the lowest of the inner docking stickers would put the form as the lower of the two, sharing the space equally.

Dragging them to the left or right inner docking stickers will be the same as the furthest left of right docking stickers if there is only one row of forms.

4. Move the form so that it appears as a tabbed form.

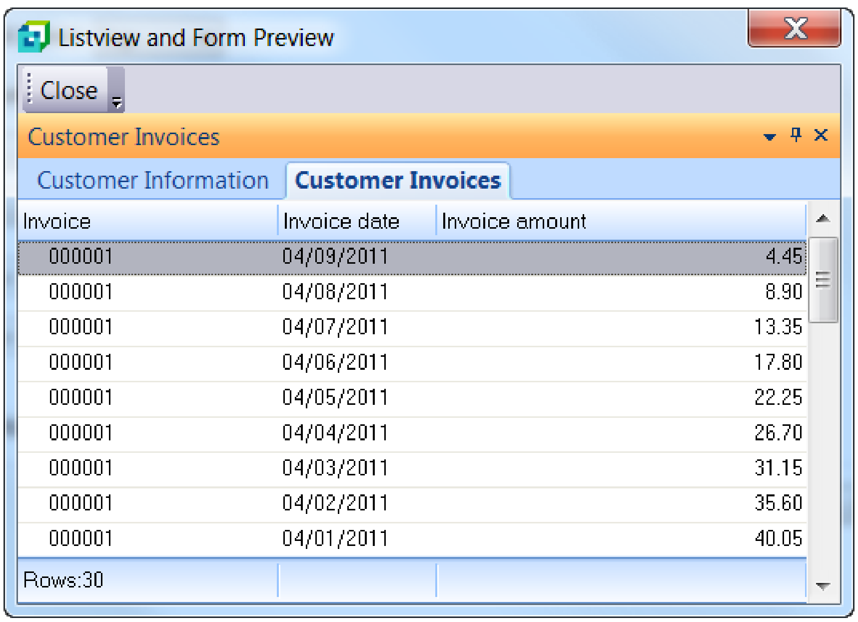
   a. Drag the **Customer Invoices** form by its title bar away from its location and place it over the center of the inner docking sticker.

      The whole of the preview window is highlighted in blue.



b. Release the form.

The two forms appear as tabbed forms using up the full width of the window.



5. Reset the form layout.
   a. Click on the form title drop-down menu.
   b. Select **Reset Layout** from the **View Panes** menu option.

SYSPRO Help

The SYSPRO Help system delivers context-sensitive documentation in html format when you press **F1** within any SYSPRO program.

Once the help system is launched, you can also locate specific information using the **Search** function. This enables you to retrieve information based on the entry of one or more keywords. In addition, you can press **Ctrl+F** on any help screen to use the **Find** function to locate information specific to that screen.

Keyboard shortcuts

Keyboard shortcuts are function keys and multi-key combinations providing quick access to program functions.

Within SYSPRO you can use a number of keyboard shortcuts to either activate a function or accelerate the performance of a task.

In addition to the shortcuts we have mentioned previously such as

- F1 - Launch SYSPRO Help
- F8 - Quick Launch Menu

there are the following shortcuts:

Form-related

A number of functions can be activated from within a SYSPRO listview or docking pane. The availability of these functions varies according to the program from which the listview or docking pane is displayed.

You can view the full list of functions for the current listview pane by pressing Ctrl+F1.

Function	Keystroke	Description
Print	Ctrl+F2	This outputs the contents of the listview pane to your current printer destination.
Export/Output as HTML	Ctrl+F7	This outputs the contents of the listview pane to an HTML page. A file is created in the `base\samples` folder of your SYSPRO installation. The naming convention of the file is the operator code and an .htm extension.
Export/Output to Excel	Ctrl+F8	This outputs the contents of the listview pane to an Excel Workbook. The naming convention of the file is the operator code and a .txt extension.
Filter Rows	Ctrl+F	This enables you to search the contents of the listview pane for specific details.
Find and Replace	Ctrl+Shift+F	
Export as XML	Ctrl+Shift+X	This output the contents of the listview pane to an XML file. The file is created using the document path and name that you specify. A stylesheet is also created (.xsl) which is referenced from within the XML file.

Search-related

Function	Keystroke	Description
Find	Ctrl+F	Within a SYSPRO listview, this function enables you to locate information about items within SYSPRO according to extensive search criteria and pattern matching.
Quick Find	Shift+F2, Ctrl+Shift+F2	This enables you to perform a detailed search on various categories of information within SYSPRO.
System information	Shift+F7, Ctrl+Shift+F7	This enables you to identify which operators are accessing the system and what programs are currently running. It includes details about your SYSPRO environment and information relating to your printer configuration.

Function	Keystroke	Description
		This function can be used to solve problems that arise, for example, where a number of operators are accessing the system at the same time - some from different physical locations.

Printing-related

Function	Keystroke	Description
Print preview	Shift+F4	This toggles (i.e. switches on or off) the print preview function within SYSPRO. When print preview mode is switched on, you can preview reports before sending them to the printer. It also enables you to e-mail reports to internal and external mail users.
Print	Ctrl+P	(Print Preview Mode) This enables you to print a single page, all pages or a range of pages in a document.

Summary

By the end of this chapter you have learnt

1. A window in SYSPRO represents the whole screen and is divided into a number of areas called forms. A display form refers to a form that only displays information (i.e. you cannot add or maintain data within a display form). An entry form refers to a form that contains fields against which you can change values. Fields appear on forms and typically comprise a caption and matching value. Docking panes are forms that can be moved to different positions on the screen.
2. How to customize a form using the context sensitive menu.
3. How to customize a listview.
4. How to move and dock panes to the required position in SYSPRO.

Conclusion

Chapter 3

Conclusion

You have now completed the SYSPRO Orientation Training Guide. Below is a recap of what you covered:

- **Menus**: You learned about the SYSPRO menu in SYSPRO version 6.1. You learnt how to use the ribbon bar, how to create a favorites menu and the functions performed from the SYSPRO Button. In addition you learnt how to customize the user interface.
- **User Interface of a SYSPRO programs**: You learnt the terminology used within a SYSPRO program. You learnt how to customize a program. You also learnt about the keyboard shortcuts available.

Related Topics

To enhance your knowledge about SYSPRO, we recommend that you review the following additional topics:

- Customization and Power-Tailoring
- System Administration Training Guide.

Certification

SYSPRO provides a number of additional resources to improve your product knowledge. This guide in conjunction with Reference Guides, Tutorials and AT&T Connect recordings are the tools you require for the solution-related certification exam. Please refer to your local office for more information.

Support Zone

It is essential that you make use of the SYSPRO Support Zone to keep up-to-date on information about SYSPRO.

The Support Zone provides you with updated information on enhancements, new products and training information.

In addition, there are tutorials, frequently asked questions (FAQs) and case studies, which provide useful technical information.

Comment Sheet

Please send us your comments to help improve the standard of the workbooks. All emails can be sent to education.hub@syspro.com .