

Tips and Tricks

Clair Rohl – 21 November 2024

Agenda



- Logging and Audit Utilities
- Keeping your SYSPRO install up to date
- NexSys HelpDesk Portal



Logging Utilities



Audit operator and transactional activity within the business



Ensure data integrity and security compliance



Investigate and troubleshoot issues

Operator Activity

- Job Logging
- System Audit Query
- Setup Amendment Jnl
- Operator Amendment Jnl

Transactional Activity

- Amendment Journals
- Order Intake Query
- Sales Order Query
- Electronic Signatures

Business Activity

- SRS Report Queue
- SRS Document Queue
- Automation
- Health Check B/O

Job Logging



Administration > Job Logging > Job Logging Query (or Ribbon Bar > Setup)

Transactions									
	Logon /	Logoff	Run Time	Program name	Operator name	Status	Message		Detail
<input type="checkbox"/>	2024-11-0	Company > Options							
<input type="checkbox"/>	2024-11-0	Options							
<input type="checkbox"/>	2024-11-0	Job logging required						<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2024-11-0	Job logging for business object						<input type="checkbox"/>	
<input type="checkbox"/>	2024-11-0	Job logging for SRS reports						<input checked="" type="checkbox"/>	View
<input type="checkbox"/>	2024-11-06 - 08:28:32	2024-11-06 - 08:28:36	0:00:04	AR Invoice Integration update	Clair Rohl				
<input type="checkbox"/>	2024-11-06 - 08:28:33	2024-11-06 - 08:28:36	0:00:03	GL Journal Posting	Clair Rohl				View
<input type="checkbox"/>	2024-11-06 - 08:28:49	2024-11-06 - 08:28:49	0:00:01	Store SRS Archive Files on Server	SYSPRO SRS Server				
<input type="checkbox"/>	2024-11-06 - 08:28:54	2024-11-06 - 08:28:54	0:00:01	Store SRS Archive Files on Server	SYSPRO SRS Server				
<input type="checkbox"/>	2024-11-06 - 08:28:58	2024-11-06 - 08:28:58	0:00:01	Store SRS Archive Files on Server	SYSPRO SRS Server				



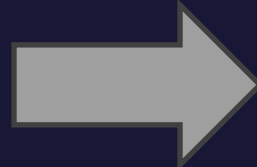
Job Logging

Administration > Job Logging > Job Logging Query (or Ribbon Bar > Setup)



Logon	Logoff	Run Time	Prog	Pro
2023-05-26 - 13:54:31				
2023-05-26 - 15:15:59				
2023-05-26 - 14:29:35				
2023-05-26 - 14:02:27				
2023-05-26 - 14:00:34				
2023-05-26 - 13:59:53				
2023-05-26 - 13:53:31				

- Export/print
- Customize
- Group by This Field
- Group by Box
- Remove This Column
- Field Chooser**



Field Chooser	
Client/Server id	^
Computer name	
File	
File status message	
Group	
Group name	
Logoff date	
Logoff time	
Logon date	
Logon time	
Operator	
PID	

Transactions																	
	Logon	Logoff	Run Time	Role name	Group name	Computer name	PID	SPID	Program	Program version	Program name	Operator na...	File	Transaction	Status	Message	Detail
<input type="checkbox"/>	2024-11-07 - 08:29:25	2024-11-07 - 08:29:31	0:00:06	Systems And Database Administrator	Administrator Group	Syspro8Master	7224	55	IMP040	8.0.521	SO Entry	Clair Rohl					
<input type="checkbox"/>	2024-11-07 - 08:29:14	2024-11-07 - 08:29:20	0:00:06	Systems And Database Administrator	Administrator Group	Syspro8Master	7224	55	IMP010	8.0.323	Inventory Movements	Clair Rohl					
<input type="checkbox"/>	2024-11-07 - 08:23:39	2024-11-07 - 08:24:02	0:00:22		Administrator Group	Syspro8Master	5100	67	IMPPMP	8.0.020	Operator Maintenance	Clair Rohl					
<input type="checkbox"/>	2024-11-06 - 08:28:33	2024-11-06 - 08:28:36	0:00:03		Administrator Group	Syspro8Master	12620	83	GENTJL	8.0.058	GL Journal Posting	Clair Rohl					View
<input type="checkbox"/>	2024-11-06 - 08:28:32	2024-11-06 - 08:28:36	0:00:04		Administrator Group	Syspro8Master	12620	83	ARSPGI	8.0.058	AR Invoice Integrati...	Clair Rohl					
<input type="checkbox"/>	2024-11-06 - 08:27:47	2024-11-06 - 08:28:41	0:00:54		Administrator Group	Syspro8Master	12620	83	IMP041	8.0.318	SO Batch Invoicing	Clair Rohl					View
<input type="checkbox"/>	2024-11-06 - 08:03:09	2024-11-06 - 08:03:17	0:00:07		Administrator Group	Syspro8Master	12880	60	IMP8PG	8.0.016	Admin SYSPRO Pro...	Clair Rohl					
<input type="checkbox"/>	2024-11-06 - 08:03:02	2024-11-06 - 08:03:20	0:00:18		Administrator Group	Syspro8Master	12880	60	IMPWZ1	8.0.023	Add a Favorite Shor...	Clair Rohl					
<input type="checkbox"/>	2024-11-06 - 08:01:08	2024-11-06 - 08:01:37	0:00:29		Administrator Group	Syspro8Master	12880	60	IMPPMP	8.0.020	Operator Maintenance	Clair Rohl					

SE
RE

Job Logging



Administration > Job Logging > Job Logging Query (or Ribbon Bar > Setup)

Drill in to see the details available

Job Logging Query

File Options Functions

Time filter: Custom filter Refresh View Show Custom Filter

Logon	Logoff	Run Time	Program name	Operator name	Message	Status	Transaction	Detail
<input type="checkbox"/> 2024-11-06 - 08:01:08	2024-11-06 - 08:01:37	0:00:29	Operator Maintenance	Clair Rohl				
<input type="checkbox"/> 2024-11-06 - 08:03:02	2024-11-06 - 08:03:20	0:00:18	Add a Favorite Shortcut	Clair Rohl				
<input type="checkbox"/> 2024-11-06 - 08:03:09	2024-11-06 - 08:03:17	0:00:07	Admin SYSPRO Programs	Clair Rohl				
<input checked="" type="checkbox"/> 2024-11-06 - 08:27:47	2024-11-06 - 08:28:41	0:00:54	SO Batch Invoicing	Clair Rohl				View
<input type="checkbox"/> 2024-11-06 - 08:28:32	2024-11-06 - 08:28:36	0:00:04	AR Invoice Integration ...	Clair Rohl				
<input type="checkbox"/> 2024-11-06 - 08:28:33	2024-11-06 - 08:28:36	0:00:03	GL Journal Posting	Clair Rohl				

Details

Date	Time	Transaction
06/11/2024	08:28:03	Invoice register : 0000000046 invoice number : 000000000100536 00
06/11/2024	08:28:04	Invoice register : 0000000046 invoice number : 000000000100537 00
06/11/2024	08:28:05	Invoice register : 0000000046 invoice number : 000000000100538 00
06/11/2024	08:28:06	Invoice register : 0000000046 invoice number : 000000000100539 00

Details

Date	Time	Transaction
06/11/2024	08:28:34	GL journal created from sub module. Key= 2024020000000088 Post= Y
06/11/2024	08:28:36	GL journal posted. Key = 2024020000000088



Job Logging

Administration > Job Logging > Job Logging Query (or Ribbon Bar > Setup)



Custom Filter to view required data

The screenshot shows the 'Job Logging Query' application interface. The main window displays a list of transactions with columns for Logon, Logoff, Run Time, Program name, Operator name, and Detail. A 'Filter Options' dialog box is open, showing various filter settings. The 'Log date selection' section is highlighted with a red box, showing 'Date filter type' set to 'Range', 'Start date' as '01/10/2024', and 'End date' as '31/10/2024'. The 'Operator selection' section is also highlighted with a red box, showing 'Operator filter type' set to 'Single' and 'Start operator' as 'ADMIN'. Other filter options include 'Log time selection', 'SPID selection', and 'Status selection'.

Logon /	Logoff	Run Time	Program name	Operator name	Detail
2024-10-05 - 16:06:07	2024-10-05 - 16:06:18	0:00:10	General Ledger Code ...	SYSPRO Admin...	
2024-10-06 - 11:02:17	2024-10-06 - 11:04:32	0:02:14	General Ledger Code ...	SYSPRO Admin...	
2024-10-06 - 11:45:38	2024-10-06 - 11:46:49	0:01:10	AP Supplier Maintena...	SYSPRO Admin...	
2024-10-06 - 11:46:12	2024-10-06 - 11:46:12	0:00:01	AP Supplier Query	SYSPRO Admin...	
2024-10-06 - 11:46:50	2024-10-06 - 11:48:54	0:02:03	AP Supplier Query	SYSPRO Admin...	
2024-10-06 - 11:54:56	2024-10-06 - 11:56:50	0:01:53	AP Invoice Posting	SYSPRO Admin...	
2024-10-06 - 11:56:48	2024-10-06 - 11:56:49	0:00:01	AP Invoice GL Integra...	SYSPRO Admin...	
2024-10-06 - 11:56:48	2024-10-06 - 11:56:49	0:00:01	GL Journal Posting	SYSPRO Admin...	View
2024-10-06 - 11:56:54	2024-10-06 - 11:59:45	0:02:50	AP Supplier Query	SYSPRO Admin...	
2024-10-06 - 12:37:31	2024-10-06 - 12:40:37	0:03:05	Setup Options	SYSPRO Admin...	
2024-10-06 - 12:37:36	2024-10-06 - 12:37:36	0:00:01	Query GL Integration ...	SYSPRO Admin...	
2024-10-06 - 12:37:37	2024-10-06 - 12:37:37	0:00:01	Query Tax Options	SYSPRO Admin...	
2024-10-06 - 12:37:37	2024-10-06 - 12:37:37	0:00:01	Query Accounts Paya...	SYSPRO Admin...	
2024-10-06 - 12:41:25	2024-10-06 - 12:44:51	0:03:26	Setup Options	SYSPRO Admin...	
2024-10-06 - 12:41:37	2024-10-06 - 12:41:37	0:00:01	Query GL Integration ...	SYSPRO Admin...	
2024-10-06 - 12:41:38	2024-10-06 - 12:41:38	0:00:01	Query Tax Options	SYSPRO Admin...	
2024-10-06 - 12:41:38	2024-10-06 - 12:41:38	0:00:01	Query Accounts Paya...	SYSPRO Admin...	
2024-10-11 - 13:31:12	2024-10-11 - 13:31:23	0:00:10	GL General Ledger Q...	SYSPRO Admin...	
2024-10-11 - 13:31:28	2024-10-11 - 13:32:19	0:00:51	General Ledger Code ...	SYSPRO Admin...	
2024-10-11 - 13:32:21	2024-10-11 - 13:32:33	0:00:11	GL General Ledger Q...	SYSPRO Admin...	
2024-10-11 - 13:32:45	2024-10-11 - 13:33:40	0:00:55	AR Customer Mainten...	SYSPRO Admin...	
2024-10-11 - 13:33:45	2024-10-11 - 13:34:18	0:00:33	AR Customer Query	SYSPRO Admin...	
2024-10-11 - 13:43:50	2024-10-11 - 13:45:10	0:01:19	AR Invoice Posting	SYSPRO Admin...	
2024-10-11 - 13:44:42	2024-10-11 - 13:44:43	0:00:01	AR Invoice Integratio...	SYSPRO Admin...	
2024-10-11 - 13:44:43	2024-10-11 - 13:44:43	0:00:01	GL Journal Posting	SYSPRO Admin...	View
2024-10-11 - 13:45:08	2024-10-11 - 13:45:08	0:00:01	AR Invoice Integratio...	SYSPRO Admin...	
2024-10-11 - 13:45:08	2024-10-11 - 13:45:08	0:00:01	GL Journal Posting	SYSPRO Admin...	View
2024-10-11 - 13:45:13	2024-10-11 - 13:46:53	0:01:40	AR Customer Query	SYSPRO Admin...	
2024-10-11 - 14:58:29	2024-10-11 - 15:00:19	0:01:50	Operator Maintenance	SYSPRO Admin...	

Job Logging

Administration > Job Logging



Job Logging Query

File Options Functions

Time filter: Custom filter Refresh View Show Custom Filter

Transactions						Details		
Logon	Logoff	Run Time	Program name	Operator name	Detail	Date	Time	Transaction /
2024-11-06 - 08:27:47	2024-11-06 - 08:28:41	0:00:54	SO Batch Invoicing	Clair Rohl	View	06/...	08:28...	Invoice register : 0000000046 invoice number : 000000000100536 00
						06/...	08:28...	Invoice register : 0000000046 invoice number : 000000000100537 00
						06/...	08:28...	Invoice register : 0000000046 invoice number : 000000000100538 00
						06/...	08:28...	Invoice register : 0000000046 invoice number : 000000000100539 00

Filter Options

Apply Custom Filter Reset

Log date selection	
Date filter type	Range
Start date	02/09/2024
End date	07/11/2024

Log time selection	
Time filter type	No filter
Start time	00:00
End time	23:59

Operator selection	
Operator filter type	No filter
Start operator	
End operator	
Operator list	

Program selection	
Program filter type	Single
Start program	IMP041
End program	

Status selection	
Status filter	Filter on status
File errors	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Remarks	<input type="checkbox"/>
Blank status	<input type="checkbox"/>

Transaction selection	
Transaction filter	No filter



System Audit Query

Administration > Security > Query > System Audit Query



System Audit

File

Time filter: Past month Category filter: Access denied to program

Transactions

Date	Time	Type	Notes
2024/11/08	10:32:16.40	Access d	'ARSPEN - AR Customer Query'
2024/11/08	16:51:48.28	Operator	Operator 'CLAIR - Clair Rohl' (user 30, PID , SPID 55) killed by 'CLAIR'
2024/11/08	16:51:49.21	Login att	Operator 'CLAIR'
Date: 2024/11/07			
2024/11/07	07:56:54.29	Operator	Operator 'CLAIR - Clair Rohl' (user 26, PID , SPID 60) killed by 'CLAIR'
2024/11/07	07:56:54.35	Operator	Operator 'CLAIR - Clair Rohl' (user 28, PID , SPID 83) killed by 'CLAIR'
2024/11/07	07:56:55.29	Login att	Operator 'CLAIR'
2024/11/07	08:24:00.48	Operator changed	'Clair Rohl'
Date: 2024/11/06			
2024/11/06	07:35:02.33	SYSPRO data conversion completed successfully	System-wide database ('Syspro8dbEdu') upgraded to '8.0.0.0045'. Script: SYSPRO8_DbUpdate_sys.sql
2024/11/06	07:35:12.92	SYSPRO data conversion completed successfully	Standard data dictionary uploaded to system wide database ('Syspro8dbEdu') successfully.
2024/11/06	07:35:13.24	SYSPRO data conversion completed successfully	Views successfully merged into data dictionary
2024/11/06	07:35:13.78	SYSPRO data conversion completed successfully	User defined objects successfully merged into data dictionary
2024/11/06	07:35:13.78	SYSPRO data conversion completed successfully	Data dictionary migration to system-wide database ('Syspro8dbEdu') successfully completed.
2024/11/06	07:35:16.66	SYSPRO data conversion completed successfully	Espresso tables created in system-wide database ('Syspro8dbEdu') successfully completed.
2024/11/06	07:35:16.76	SYSPRO data conversion completed successfully	Avanti tables updated in system-wide database ('Syspro8dbEdu') successfully completed.
2024/11/06	07:46:46.03	SYSPRO data conversion completed successfully	Company 'EDU1' ('SysproEdu1') upgraded to '8.0.0.0045'. Script: SYSPRO8_DbUpdate.sql

Items:290

System Audit Query



Administration > Security > Query > System Audit Query

Custom Form Changes

Custom form - Column deleted
Custom form - Column renamed
Custom form - Data migrated from AdmFormData

Licence Changes

License expiry warning message shown
License invalid for company
License update failed
License updated successfully

Client-Server Diagnostics

Client-Server - Communication failure
Client-Server - Failure to self-heal screenset

Operator Changes

Operator activated via active directory
Operator added
Operator changed
Operator deleted
Operator details changed via active directory
Operator disabled via active directory
Operator logged out by another user
Operator logged self out using "EXIT" parameter
Operator password options changed
Operator password rules changed
Operator removed via active directory
Operator security - Force change password set

System Setup Changes

System setup - OData endpoint changed
System setup - Options changed
System setup - Password definition options change
System setup - Reporting options changed
System setup - SMTP/Email settings changed
System setup - Server-side folder changed
System setup - Single sign-on Identity Provider
System setup - Single sign-on options changed

Login attempts

Login attempted - Invalid company
Login attempted - Invalid company password
Login attempted - Invalid user name
Login attempted - Invalid user password
Login attempted - License limit approached
Login attempted - Locked out after failed attempts
Login attempted - Operator locked out
Login attempted - Operator password expired
Login attempted - User license exceeded
Login attempted - User license reached
Login attempted - User not added to user file
Login attempted and cancelled

System Audit Query



Administration > Security > Query > System Audit Query

System Audit

File

Time filter: Past month Category filter: Access denied to program

Transactions

Date /	Time	Type	Operator name	Notes
[-] Date: 2024/11/08				
2024/11/08	10:32:16.40	Access denied to program	Gary Aubrey	'ARSPEN - AR Customer Query'
[-] Date: 2024/11/11				
2024/11/11	14:02:32.31	Access denied to program	Cian O' Conner	'SORPOE - SO Entry Express'
[-] Date: 2024/11/13				
2024/11/13	09:34:53.39	Access denied to program	Mary Anderson	'INVPEN - Inventory Query'
[-] Date: 2024/11/15				
2024/11/15	11:41:48.77	Access denied to program	Mary Anderson	'WIPP05 - WIP Job Entry'



Operator Amendment Journals



Administration > Amendment Journals > Operator Amendment Journal

Operator Amendment Journals									
File Options Functions									
Time filter: Past year Refresh View Show Custom Filter									
Journal Details									
Date /	Time	Operator	Name	Changed by	Changed by name	Function	Field description	Before value	After value
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	SO Allow change of value for user defined service charge	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	SO Allow change of quantity for labor service charge	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Req originator allowed to route requisition (e.net only)	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Req budget deletion	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Req approve where over budget	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Req approve where no budget	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Req approve reqn line when price is zero when approving entire ...	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Receipt override lot expiry date calculated from shelf life	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO LCT change global exchange rate when associated sales order	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	PO Allow use of any current supplier contract price for Blanket PO	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	Inv Allow bin transfers if lot is on hold	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	GL Show journal number created	Denied	Allowed
26/10/2024	09:13:46:44	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	Activity access	List	Allow all
Date: Last month									
09/10/2024	18:58:05:94	PAT	Pat Webb	ADMIN	SYSPRO Administrator	Operator changed	Fax/mail integration required	No	Yes
Date: This year									
17/02/2024	15:55:08:94	ADMIN	SYSPRO Administrator	ADMIN	SYSPRO Administrator	Operator changed	Report designer	No	No
13/08/2024	10:53:22:38	BRAD	Bradley Preston	ADMIN	SYSPRO Administrator	Operator changed	Group	SALES	MARK
21/02/2024	13:36:24:59	DSW	DSW USER	ADMIN	SYSPRO Administrator	Operator added			
12/03/2024	20:24:28:58	_SA	Syspro Analytics	ADMIN	SYSPRO Administrator	Operator deleted			
12/03/2024	20:25:01:03	__SA	SYSPRO Analytics	ADMIN	SYSPRO Administrator	Operator added			
18/07/2024	13:28:28:16	DAVID	David Blackburn	ADMIN	SYSPRO Administrator	Operator added			
18/07/2024	13:29:34:61	DAVID	David Blackburn	ADMIN	SYSPRO Administrator	Operator deleted			



Setup Amendment Journals



Administration > Amendment Journals > Setup Amendment Journal (or Ribbon Bar > Setup)

Select	Date and Time /	Program name	Tab Page Descript...	Field Description	Before Value	After Value	Operator name
<input type="checkbox"/>	2024/01/21 - 09:03:15:07	Post Key Information		Next AR invoice	100534	200000	SYSPRO Administrator
<input type="checkbox"/>	2024/01/21 - 09:03:15:07	Post Key Information		Next AR credit note	800100	200000	SYSPRO Administrator
<input type="checkbox"/>	2024/01/21 - 09:09:04:40	Post Key Information		Next AR invoice	200003	100534	SYSPRO Administrator
<input type="checkbox"/>	2024/01/21 - 09:09:04:40	Post Key Information		Next AR credit note	200001	800100	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:03:44:83	Post SO Company Setup Opti...	Pricing	Pricing method	Simple	Price Groups	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:03:44:83	Post SO Company Setup Opti...	Tax/Um	Customer's company tax registration number for order e...	Mandatory	Not mandatory	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:04:04:31	Post SO Company Setup Opti...	Pricing	Default price group level	Customer	Branch	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:48:17:96	Post SO Company Setup Opti...	Pricing	Pricing method	Price Groups	Simple	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:48:17:96	Post SO Company Setup Opti...	Pricing	Default price group level	Branch	Customer	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:50:19:70	Post SO Company Setup Opti...	Pricing	Pricing method	Simple	Price Groups	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 10:51:30:92	Post SO Company Setup Opti...	Pricing	Pricing method	Price Groups	Simple	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:00:09:65	Post SO Company Setup Opti...	Pricing	Pricing method	Simple	Price Groups	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:00:09:65	Post SO Company Setup Opti...	Pricing	Default price group level	Customer	Branch	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:11:29:50	Post SO Company Setup Opti...	Pricing	Pricing method	Price Groups	Simple	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:11:29:50	Post SO Company Setup Opti...	Pricing	Default price group level	Branch	Customer	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:39:32:01	Post Key Information		Next job	600	100	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:39:32:01	Post Key Information		Next AR payment run	0000000000000000	0000000000000001	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:39:32:01	Post Key Information		Next AR collection run	0	1	SYSPRO Administrator
<input type="checkbox"/>	2024/01/31 - 11:43:52:10	Post Key Information		Next job	101	600	SYSPRO Administrator

Amendment Journals

Per Module > Reports > Amendment Journal



Preferences > Financials > Accounts Payable

Amendment journals required	<input type="radio"/> No
	<input type="radio"/> Yes
	<input checked="" type="radio"/> Yes, including additions

Search Results	
Amendment journals required	Accounts Payable
Amendment journals required	Accounts Receivable
Amendment journals required	Assets
Amendment journals required	Electronic Fund Transfer
Amendment journals required	Inventory
Amendment journals required	Bill of Materials
Amendment journals required	Options, Dated exchange rates
Build schedule amendment journals	Requirements Planning, Amendment journals required
Capture job amendment journals	Work in Progress, Job creation
Families and groupings structure	Inventory Optimization - General, Amendment journals required
Forecast amendment journals	Requirements Planning, Amendment journals required
Goods in transit amendment journal	Inventory
Job amendment journals	Work in Progress, Number of months to retain
Operation amendment journals required	Enterprise Asset Management
Policy settings	Inventory Optimization - General, Amendment journals required
Selection sets	Inventory Optimization - General, Amendment journals required
Structure amendment journals required	Enterprise Asset Management

Amendment Journals

Per Module > Reports > Amendment Journal



Supplier Amendment Journal (Additions)

Supplier	Date	Supplier name	Remittance name	Operator name
0000027	09/04/2023	International House of Bikes		SYSPRO Administrator
0000094	09/04/2023	Adventure Addicts - Head Office		SYSPRO Administrator
0000095	09/04/2023	Adventure Addicts - North		SYSPRO Administrator
0000096	09/04/2023	Adventure Addicts - South		SYSPRO Administrator
0000097	09/04/2023	Bikers Bazaar - Head Office		SYSPRO Administrator

Supplier Amendment Journal (Changes)

Supplier	Date	Field description	Before amendment	After amendment	Operator name
0000005	09/04/2023	Creditor class	M1	BI	SYSPRO Administrator
0000005	09/04/2023	Fax remittance		N	SYSPRO Administrator
0000005	09/04/2023	Pay by EFT		N	SYSPRO Administrator
0000005	09/04/2023	AutoVoucherReqd		N	SYSPRO Administrator
0000005	09/04/2023	FaxVoucherFlag		P	SYSPRO Administrator
0000005	09/04/2023	CollectTax		N	SYSPRO Administrator
0000005	09/04/2023			N	SYSPRO Administrator

Summary Amendment Count

Total additions: 8

Total changes: 7

Total deletions: 0



Amendment Journals



Area	Description		
Finance	AP Supplier Amendment Journal		
Finance	AR Customer Amendment Journal		
Finance	Currency Amendment Journal		
Finance	EFT CB Beneficiary Amendment Journal		
Finance	Asset Amendment Journal		
Distribution	GIT Detail Amendment Journal		
Distribution	Inventory Amendment Journal		
Distribution	SO Pick Amendment Journal		
Manufacturing	WIP Job Amendment Journal		
Manufacturing	MRP Forecast Amendment Journal		
Manufacturing	MRP Build Schedule Amendment Journal		
Manufacturing	BOM Structure Amendment Journal		



Order Intake Query

Sales Orders > Order Intake Query



Configuration > Distribution > Sales Orders

Order lines added	<input checked="" type="checkbox"/>
Order lines changed	<input checked="" type="checkbox"/>
Orders or lines cancelled	<input checked="" type="checkbox"/>
Include blanket sales orders	<input checked="" type="checkbox"/>
Changed lines for order level discount	<input checked="" type="checkbox"/>
Output detail lines for cancelled order	<input checked="" type="checkbox"/>



- SorAdditions
- SorChanges
- SorCancelled

Order Intake Query



DEMO

Sales Orders > Order Intake Query

Sales Orders > Sales Order Query



Electronic Signatures



Administration > Electronic Signatures >
Electronic Signature Configuration Setup
(or Ribbon Bar > Setup > Electronic Signatures)

Administration > Electronic Signatures >
eSignature Query

DEMO

Automating tasks within SYSPRO



Housekeeping Routines

- Balance Functions
- Integration



Documentation

- Dispatch Notes
- Invoices



Daily Tasks

- MRP Calculation
- Cost Implosion
- Scheduled Order Allocation
- Sales Analysis Update

1. Set Form Defaults under Automation Design

2. Create a Task Group

3. Create a batch file to launch the SYSPRO client

```
[ ..SYSPROClient.exe /WCF=YourServerName:30110  
/BASEDIR=0 /OPER=AUTO /PASS=AUTO /comp=EDU1  
/Prog=TASK /Link=DAILYMRP /F ]
```

4. Create a windows scheduled task to run the batch file

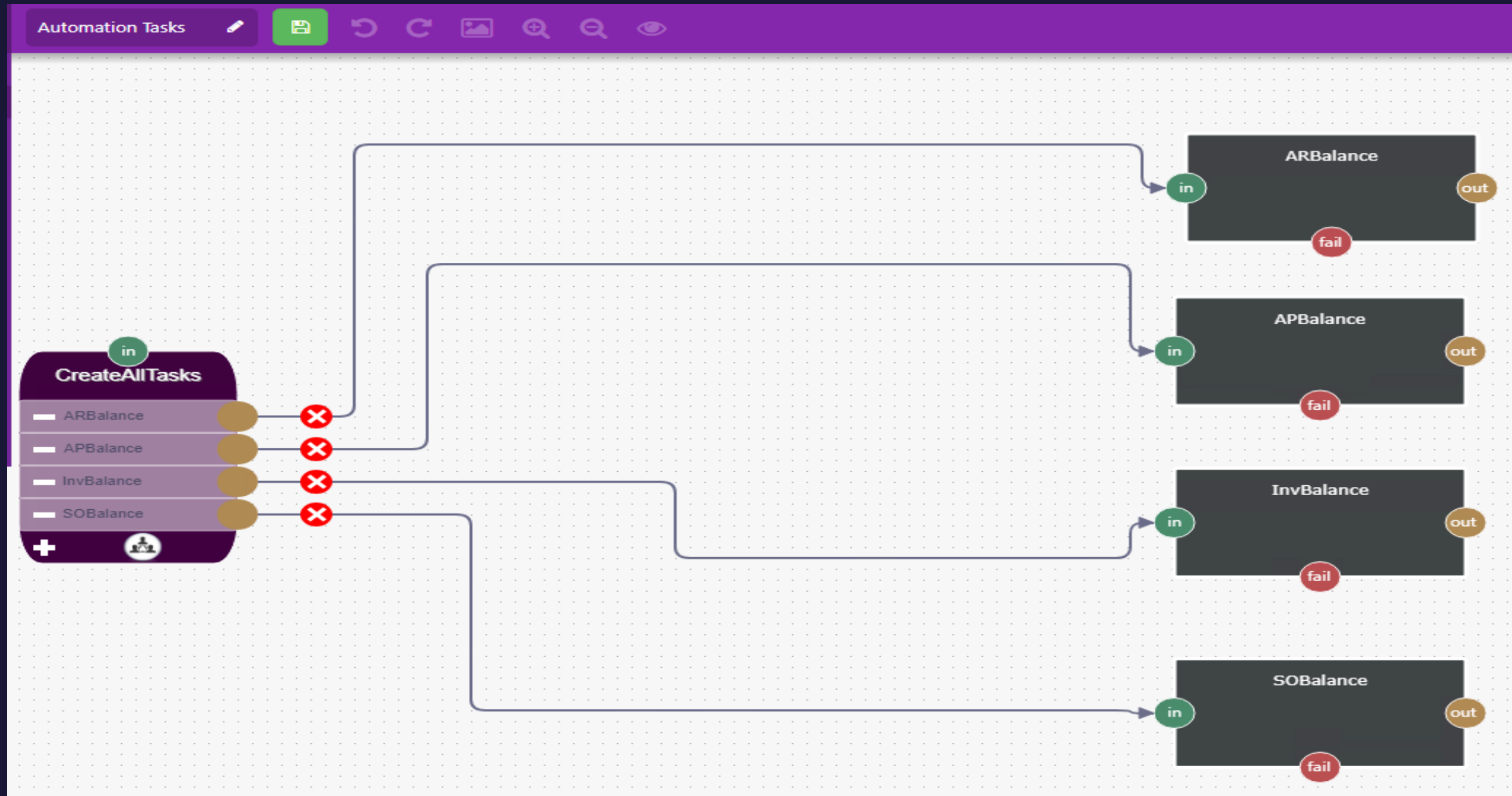
Health Check Business Object (COMTHC)



```
SYSPRO e.net Diagnostics
File Edit Data Export Framework Help
+
V
Business
<AccountsPayableOptions>
  <AccountsPayableBalance>Y</AccountsPayableBalance>
<SalesQuantityOptions>
  <SalesQuantityBalance>Y</SalesQuantityBalance>
  <ResetInProgress>Y</ResetInProgress>
  <UseBalanceResults>N</UseBalanceResults>
  <BalanceRunDate/>
  <BalanceRunTime/>
</SalesQuantityOptions>
<SalesToInventoryOptions>
  <SalesToInventoryBalance>Y</SalesToInventoryBalance>
  <Warehouse/>
  <ResetInProgress>Y</ResetInProgress>
  <RecalcSerialQtyAvail>Y</RecalcSerialQtyAvail>
  <UseBalanceResults>N</UseBalanceResults>
  <BalanceRunDate/>
  <BalanceRunTime/>
</SalesToInventoryOptions>
<SalesCustomerBalanceOptions>
  <SalesCustomerBalance>Y</SalesCustomerBalance>
  <UseBalanceResults>N</UseBalanceResults>
  <BalanceRunDate/>
  <BalanceRunTime/>
</SalesCustomerBalanceOptions>
  <ResetLocked>N</ResetLocked>
  <UseBalanceResults>N</UseBalanceResults>
```



Automating Balance Functions using DataSwitch



Automating Balance Functions using DataSwitch

Scheduler Manager Home > Scheduler Manager

[Back](#) [Save](#) [Delete](#) [Tidy XML](#)

Schedule

Name: A_Daily_Balance

Group: A

Timezone: (UTC) Coordinated

▶	10624722	● Updated	Automation Tasks	CreateAllTasks	SYSPRO Automation Tasks	16/10/2024, 06:20:00	
▶	10624724	● Updated	Automation Tasks	ARBalance	SYSPRO Automation Tasks	16/10/2024, 06:20:04	10624722
▶	10624725	● Updated	Automation Tasks	APBalance	SYSPRO Automation Tasks	16/10/2024, 06:20:04	10624722
▶	10624726	● Updated	Automation Tasks	InvBalance	SYSPRO Automation Tasks	16/10/2024, 06:20:04	10624722
▶	10624727	● Updated	Automation Tasks	SOBalance	SYSPRO Automation Tasks	16/10/2024, 06:20:04	10624722

Datastep

Virtual Service: DataswitchSVC_A

Datastep: Automation Tasks: CreateAllTasks

```
1 <Test>1</Test>
```

Automating Balance Functions using DataSwitch



```
Input Edit
1 <XmlIn>
2 <HealthCheckCorrections xmlns:xsd="http://www.w3.org/2001/XMLSchema-instance" xsd:noNa
3 <Options>
4 <AccountsPayableOptions>
5 <AccountsPayableBalance>Y</AccountsPayableBalance>
6 <ResetLowestJnl>Y</ResetLowestJnl>
7 <BalanceRunDate />
8 <BalanceRunTime />
9 </AccountsPayableOptions>
10 <LockType>H</LockType>
11 <DetailOrSummary>D</DetailOrSummary>
12 <MaxItemsToReturn>5000</MaxItemsToReturn>
13 <XslStylesheet />
14 </Options>
15 </HealthCheckCorrections>
16 </XmlIn>
```

```
Output
1 <?xml version="1.0" encoding="Windows-1252"?>
2 <HealthCheckCorrections Language='05' Language2='EN' CssSty
3 <AccountsPayableResults>
4 <StartDate>2024-10-17</StartDate>
5 <StartTime>06:20:08.497</StartTime>
6 <DetailInformation>
7 <RowsAffected>2</RowsAffected>
8 <CompanyAffected>1</CompanyAffected>
9 <SuppliersAffected>1</SuppliersAffected>
10 <InvoicesAffected>0</InvoicesAffected>
11 <CompanyImbalances>
12 <Item>
13 <BalMessage>Original company balance</BalMessage>
14 <BalAmount> 767942.48</BalAmount>
15 </Item>
16 <Item>
```


Health Check Business Object (COMTHC)

Fix Tables



Table name	Description
AdmSqlHealthBalFix	Admin SQL Health Check Corrections
AdmSysSqlFix	Admin SQL System Corrections
ApCtlHealthFix	AP Control Health Check Fix
ApInvHealthFix	AP Invoice Health Check Fix
ApSuppHealthFix	AP Supplier Health Check Fix
ArCtlHealthFix	AR Control Health Check Fix
ArCustHealthFix	AR Customer Health Fix
ArInvHealthFix	AR Invoice Health Fix
ArTermsDate	AR Fixed Day Terms Due Date
AssetHealthFix	Asset Health Check Balances Fix
CshHealthFix	Cash Book Bank Balances Fix
GenHealthFix	General Ledger Balances Fix

Table name	Description
GtrBalancesFix	Goods in Transit Balance Fix
InvAllocatedBalFix	Inventory Allocated Balance Fix
InvGtrBalanceFix	Inventory To Goods In Transit Bal Fix
InvOnHandBalFix	Inventory On Hand Balance Fix
InvPorQtyBalFix	Inventory To Purchase Quantity Balance Fix
InvSalesQtyBalFix	Inventory To Sales Quantity Balance Fix
SorCustomerBalFix	Sales Order Customer Balance Fix
SorDetailQtyBalFix	Sales Order Line Quantity Balance Fix
WipCopBalFix	Wip Co-product Balances Fix
WipInspectBalFix	Wip Inpsect Balances Fix
WipLabBalFix	Wip Labor Balances Fix
WipMasBalFix	Wip Master Balances Fix



Health Check Business Object (COMTHC)



Fix Tables

SorDetailQtyBalFix

RunDateTime	SalesOrderLine	Warehouse	StockCode	OldQuantity	NewQuantity	Message
2024-11-16 18:15:53.670	0000000000000821	N	A101	100.000000	0.000000	Sales ship quantity adjusted to match bin quantity
2024-11-16 18:15:53.670	0000000000000825	S	A100	100.000000	0.000000	Sales ship quantity adjusted to match bin quantity
2024-11-16 18:15:53.670	0000000000000825	S	A101	100.000000	0.000000	Sales ship quantity adjusted to match bin quantity
2024-11-16 18:15:53.670	0000000000000825	S	A200	200.000000	0.000000	Sales ship quantity adjusted to match bin quantity
2024-11-16 18:15:53.670	0000000000000825	S	A201	100.000000	0.000000	Sales ship quantity adjusted to match bin quantity
2024-11-16 18:15:53.670	0000000000000827	N	A100	500.000000	0.000000	Sales ship quantity adjusted to match bin quantity

SorCustomerBalFix

RunDateTime	Customer	OldOutstOrdVal	NewOutstOrdVal	OldNumOutstOrd	NewNumOutstOrd	OldRelOrdOsValue	NewRelOrdOsValue
2024-11-16 18:15:57.203	0000000000000001	319944258.04	319951963.04	19	22	0.00	0.00
2024-11-16 18:15:57.203	0000000000000002	133280.00	133250.00	4	3	-112000.00	0.00
2024-11-16 18:15:57.203	0000000000000010	150.00	120.00	2	1	120.00	120.00
2024-11-16 18:15:57.203	0000000000000012	851140.00	851140.00	4	4	5600.00	0.00



Benefits of Server-Side Reporting

Produce and view reports anywhere, at anytime

You can print documents using SYSPRO Client, Web UI (Avanti) and Espresso

Future roadmap items likely to be server-side specific

Only installed on server (reduced system admin overhead)

'Work is done on the server (running and scheduling of reports and documents)

- queue processing so end-users don't have to wait for report/document before moving onto next task
- freeing up valuable resources on the client machine.

Completed reports are stored on the server and can be viewed remotely

No runtime is required on the client machine, only a PDF viewer

Server-Side Printing Queues

DEMO

Home > Report Queue

SRS Documents > SRS Documents > SRS Document Queue

Customise Quick Access toolbar to add the options side by side on the ribbon bar

Keeping your System Up to date



SYSPRO 7 and prior ...

- Version Update e.g. SYSPRO 6.1, SYSPRO 7
- All fixes included in a single port which were released monthly
- Ports includes both enhancements and program fixes
- No easy way to roll back if issues encountered

Keeping your System Up to date

SYSPRO 8



Installer

- Accessed via Infozone credentials
- Access to all SYSPRO 8 software components and updates
- Different Deployment Groups for live, test , sandbox



Releases

- New Release annually (used to be bi-annual)
- Release includes all fixes from previous release as well as new enhancements and features



Hotfixes

- All program fixes are released as individual hotfixes
- Hotfixes can be uninstalled where required
- A maximum of 127 hotfixes can be installed so hotfixes are consolidated after every 100 fixes released

Hotfixes



Mandatory	Customer-Specific Optional	Other Optional	Consolidated
Serious Error/Architecture Change	Specific-customer program fixes	All Program Fixes	Roll-up of prior hot fixes
Recommend Apply	Recommend Apply	Schedule Apply	Schedule Apply
Notification	Notification	No Notification	No Notification
Cannot Uninstall	Can Uninstall	Can Uninstall	Can Uninstall

How often should I apply hotfixes?

- Differ per business depending on the current activities
- Recommend periodic application of all outstanding hotfixes
- Consider implementing Sandboxes to allow user testing

Hotfixes



DEMO

System Information > Installed Hotfixes

Home > Hotfix Button

SYSPRO Installer > Hotfixes

SYSPRO 8 Release Upgrades

<https://help.syspro.com/syspro-8-2024/i-installation/articles/syspro-product-lifecycle/syspro-product-lifecycle.htm>



Product	Original Version	Current Version
SYSPRO 8 2024	August 2024	Mainstream
SYSPRO 8 2023	September 2023	Mainstream
SYSPRO 8 2022	February 2023	Extended
SYSPRO 8 2021 R2	November 2021	Extended
SYSPRO 8 2021 R1	April 2021	Extended
SYSPRO 8 2020 R2	September 2020	Legacy
SYSPRO 8 2020 R1	March 2020	Legacy
SYSPRO 8 2019 R2	September 2019	Retired July 2024
SYSPRO 8 2019 R1	March 2019	Retired July 2024
SYSPRO 8 2018 R2	September 2018	Retired July 2024
SYSPRO 8 2018 R1	July 2018	Retired July 2024
SYSPRO 7 Update 1	April 2015	Retired July 2023



SYSPRO 8 Release Upgrades

<https://help.syspro.com/syspro-8-2024/i-installation/articles/syspro-product-lifecycle/syspro-product-lifecycle.htm>



Product support level	Mainstream	Extended	Legacy	Retired
Enhancements are made to this version of software?	Yes	Rarely	No	No
Corrections to reported problems will be made to this version of the product?	Yes	Discretionary	No	No
Product support available? (assistance with product usage)	Yes	Yes	Limited	Very limited
Technical support available? (assistance with technical issues)	Yes	Yes	Limited	No
Development support available? (assistance for 3rd party developers)	Yes	Limited	Very limited	No
Annual licenses are issued?	Yes	Yes	Yes	Yes
Customers can upgrade to the mainstream product?	Not applicable	Yes	Yes	Yes



How often should I upgrade my release ?

- Recommend to ensure you are always running a mainstream release
- Plan to upgrade once annually
- Consider implementing Sandboxes for user testing
- Releases can be installed internally or arranged with your AM
- Review the NexSys SYSPRO 8 Landing Page
<https://www.nexsys.co.uk/syspro-8-update-request/>

NexSys Helpdesk Portal

<https://nexsys.support.k3btg.com/>



DEMO

Logging into the Portal

Reviewing Home Page Information

Accessing Knowledge Base Content



Recap

- Logging and Audit Utilities
- Keeping your system up to date
- NexSys HelpDesk Portal



Thank you

Platinum Sponsors



Gold Sponsors



Silver Sponsors

