CustomerName

AddressLine1 ◆ AddressLine1◆ City◆ STATE ◆ ZIPCODE

SYSPRO 7 Upgrade

Version 1.0

Document Revision History

Release	Date	Updated by	Reason for change
1.0	June 6, 2014	Shaun Hern	Initial Distribution

Accompanying Documents

This section should be updated if supporting documentation has been included as part of this document.

Document Filename	Description of Document Contents
2-01 SYSPRO 6 1 Implementation Checklist and Transaction Processing Overview.docx	Detailed checklist to ensure that Users have tested and proved field and transaction postings.
2-02 SYSPRO 6.1 Upgrade - Daily list of steps prior to upgrade.docx	List of SYSPRO Programs that need to be run in the days leading up to the upgrade.

Client Sign off Sheet

Upgrade to SYSPRO 7

This sheet represents the work that must be done by the client for an upgrade to SYSPRO 6.1 SP1

Support and services are provided by ERP Specialists Support Consultants.

Client: Click here to enter text. **Date:** Click here to enter a date.

SYSPRO VERSION:	**INSTALLED**	**UPGRADING TO**
	Click here to enter text.	Click here to enter text.

By signing this document you are confirming that to the best of your knowledge employees can complete their current daily tasks, have tested posting transactions, and printing in the new version. You agree that the system is ready for live processing.

Title:

Signature:

Date: _____ _____

_____ _____

SYSPRO Service Partner

Name **Shaun Hern**

Title: ERP Specialists, Inc. President & CEO

Signature:

Date: _____ _____

_____ _____

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Introduction

SYSPRO 7 provides users with greater scalability, customization and personalization, mobility and performance to effectively streamline business processes.

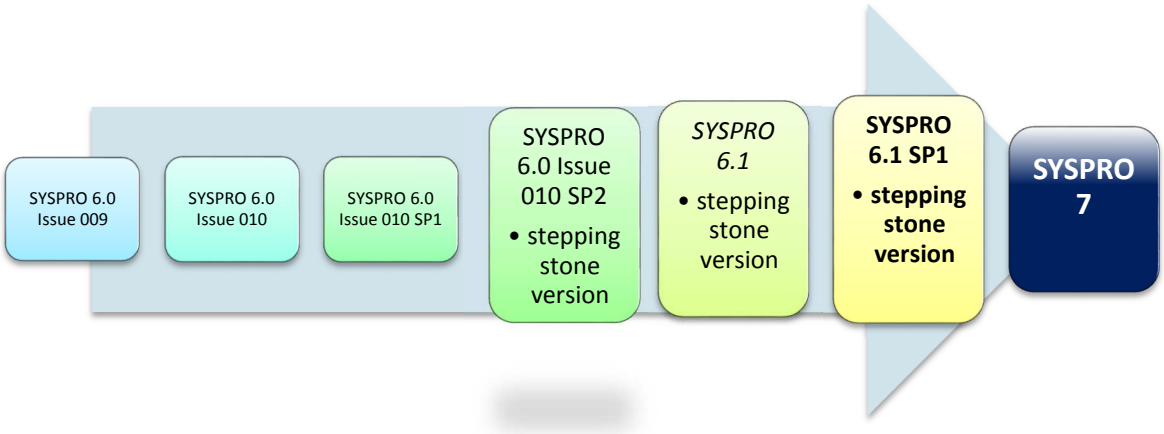
Styled upon the latest Windows technology, the intuitive solution brings active tiles and touch screen capabilities to its existing user interface, enabling manufacturers and distributors to easily create tailor-fit environments for their own system, which will operate like a home built solution, but without the maintenance and upgrade disadvantages.

Migrating from previous SYSPRO products, versions or issues

Over the past 10 years SYSPRO has released a number of software upgrades containing thousands of new features and over 20 new modules.

In addition, the product names have changed from IMPACT Award to IMPACT Encore to SYSPRO. Many of these products have had various Versions and some of these have had various CD Issues. stepping stone version

You will need to migrate to SYSPRO 6.1 SP1 before you can upgrade to SYSPRO 7.



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Prior versions

For existing users, you will need to migrate to SYSPRO 6.0 Issue 010 SP2 before you can upgrade to SYSPRO 6.1. Indicate the Current Installed version.

Product	*Original Release*	*Current phase*
SYSPRO 7	May 2014	Mainstream
☐ SYSPRO 6.1 SP1		Extended
☐ SYSPRO 6.1	Aug 2010	Extended
☐ **SYSPRO 6.0 Issue 010 SP2**	**Mar 2008**	**Extended**
☐ SYSPRO 6.0 Issue 010 SP1	May 2007	Retired in Jan 2011
☐ SYSPRO 6.0 Issue 010	Aug 2006	Retired in Jan 2011
☐ SYSPRO 6.0 Issue 009	Nov 2004	Retired in Jan 2011
SYSPRO 6.0 Issue 008	Mar 2004	Retired in Jan 2011
SYSPRO 6.0 Issue 007	Nov 2003	Retired in Jan 2011
SYSPRO 6.0 Issue 006 (re-branded Encore 5.1)	Oct 2002	Retired in Jan 2011
Encore 5.1	Oct 2001	Retired in Mar 2006
Encore 5.0	Nov 2000	Retired in Mar 2006
Encore 4.0	Jan 1999	Retired in Nov 2003
Encore 3.2	Nov 1997	Retired in Nov 2003
Award 3.2	Nov 1997	Retired in Nov 2003

Client Re-Install

The Server installation will undergo the upgrade but due to the many enhancements and changes **ALL Clients** will need to be re-installed.

If you are using any previous version or VISTA or Windows-7, you would need to re-install the client.
Note that Windows XP and any prior version of Windows are no longer supported.

☐ Check here to indicate that it is understood that Clients will need to be re-installed.

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Customization & Tailoring

Customized programs

Review the inventory of all programs that have been customized at your site, and determine which are version dependent/independent.

Program	Details	Converting
		☐ Yes ☐ No
		☐ Yes ☐ No
	ABC Barcoding	☐ Yes ☐ No
	Ship Link	☐ Yes ☐ No
	UniPoint Quality	☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No

VBScripts

The following VB Scripts are in use.

VB Script	Details	Date	Validated
	No VB Scripts in Use		☐ Yes ☐ No
			☐ Yes ☐ No
			☐ Yes ☐ No

VBSModules

VB Module	Details	Date	Validated
	No VB Modules in use		☐ Yes ☐ No
			☐ Yes ☐ No
			☐ Yes ☐ No

Customized Panes

Pane/AppBuilder	Details	Date	Validated
	No customized panes in use		☐ Yes ☐ No
			☐ Yes ☐ No
			☐ Yes ☐ No

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List of SYPRO Operator Codes

Extract a list of the Current Operator codes and review,

Operator	*Name*	*Last login*	*Location*	*Email*	*Primary group*

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Reports

Assess any reports in Report Writer or SRS to ensure that they will function correctly with the latest version of SYSPRO.

Convert	Report	Description	Primary table	Last printed	Printed	Created
☐						
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Document Templates used in SYSPRO must be Updated and Validated.

Document Templates are available in SRS (SYSPRO Reporting Services) format (Crystal Reports). Review if any of the existing templates should be replaced.

Word document …\SYSPRO61\BASE\TEMPLATE

SRS Template …SYSPRO61\BASE \ReportingCustomized\DocumentTemplate

Document Format	**Format**	**Type**	**Description**	**Template**	
AP Check Format		☐ *Standard* ☐ *SRS*			✔
					☐
AR Statement		☐ *Standard* ☐ *Word* ☐ *SRS*			☐
Inventory					
Stock Receipt		☐ Standard ☐ Word ☐ SRS			☐
INV Issue		☐ Standard ☐ Word ☐ SRS			☐
INV Transfer Out		☐ Standard ☐ Word ☐ SRS			☐
INV PO Receipt		☐ Standard ☐ Word ☐ SRS			☐
Purchase Orders					
Purchase Order		☐ Standard ☐ Word ☐ SRS			☐
Inspection Document		☐ Standard ☐ Word ☐ SRS			☐
Reject		☐ Standard ☐ Word ☐ SRS			☐
Scrap		☐ Standard ☐ Word ☐ SRS			☐
Sales Orders					
SO Invoice		☐ Standard ☐ Word ☐ SRS			☐
SO Delivery Note		☐ Standard ☐ Word ☐ SRS			☐
SO Order Acknowledge		☐ Standard ☐ Word ☐ SRS			☐
SO Dispatch Note		☐ Standard ☐ Word ☐ SRS			☐

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Licensing

1. SYSPRO 7 has a separate License File. Ensure that you have the license from SYSPRO ☐
2. If you intend using one or more of the new modules available in SYSPRO 7, or intend increasing your number of licensed users, ensure that you are in possession of the appropriate license details. ☐

   New modules include:

   ☐ SYSPRO Workflow Services

   ☐ SYSPRO Process Modeling

   ☐ Executive Dashboards

   ☐ Warehouse Management

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SYSPRO Pre-installation checklist.

Server Setup Procedure

	Function	*IP Address*	*Completed*
1.	Ensure you have the servers IP address		☐
	a. Application Server IP Address and name	Click here to enter text. Click here to enter text.	
	b. SQL Server IP Address SQL Instance Name	Click here to enter text. Click here to enter text.	
	c. Terminal Server AP Address	Click here to enter text.	
2.	Ensure that SQL database collation method is set as **Binary** or **Case Sensitive**		☐

Server Pre-Requisites

SYSPRO Prerequisites		*Web Applications Prerequisites*	
.NET Framework 2.0 32 bit or 64 bit **Microsoft .NET Framework** This is required to run SYSPRO components such as Web Applications, SYSPRO Workflow Services, SYSPRO Reporting Services and .NET user controls.	☐	.NET Framework 2.0	☐
SYSPRO Office Integration Prerequisites	☐	MSXML 3.0 or above	☐
.NET Framework 2.0	☐	Internet Information Server (IIS)	☐
SYSPRO Office Integration Web Services	☐	**SYSPRO Web Services Prerequisites**	
Internet Information Services (IIS)	☐	.NET Framework 2.0	☐
NET Framework 4.0	☐	Internet Information Server 4.0 or higher	☐

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Dependencies Considerations

Windows Installer 4.5	This is required on every machine that will have a SYSPRO installation (client and server). This is updated as part of Windows Updates. If it is not present, the SYSPRO installation program will install it before continuing. SYSPRO run-time This is required to run SYSPRO.
Microsoft SQL Native Drivers	The SQL Server Native Client contains the SQL Server ODBC driver for Windows, supporting native connectivity to Microsoft SQL Server. SYSPRO 7 is shipped with Object Linking and Embedding, Database (OLE DB) drivers from Microsoft.
Microsoft InteropForms	Interoperability allows disparate information systems from multiple vendors to readily work together and exchange data. Through this technology, SYSPRO is able to bring the power of .NET to your existing VBScript applications, by allowing you to display .NET Forms and Controls from within the same application.
Microsoft Office PIAs	Microsoft's Office Primary Interop Assemblies (PIAs) allow SYSPRO to integrate with MS Office applications, enabling you to employ enhanced features through Word, Excel and Outlook dynamically from within SYSPRO. The Microsoft Outlook PIA is required if you intend using the fax and email features of SYSPRO 7.
Crystal run-time This	is required if you use client-side printing. Java run-time This is required if you use client-side printing.
SQL Server	SYSPRO 7 is compatible with SQL Server 2005 or later. SYSPRO is licensed to ship SQL Server 2012 Standard, upon request and subject to purchase. The same installation DVD is used to install on both 32-bit and 64-bit operating systems, although certain editions of Windows may not be compatible with SQL Server 2012. For new installations, please ensure that your version of SQL Server is compatible with your operating system. • Each database must have a compatibility level of at least 90. • The collation of the system as well as each database and company needs to be: ◦ Case-sensitive (indicated by _CS_in the collation name); or◦ Binary (indicated by _BIN in the collation name).

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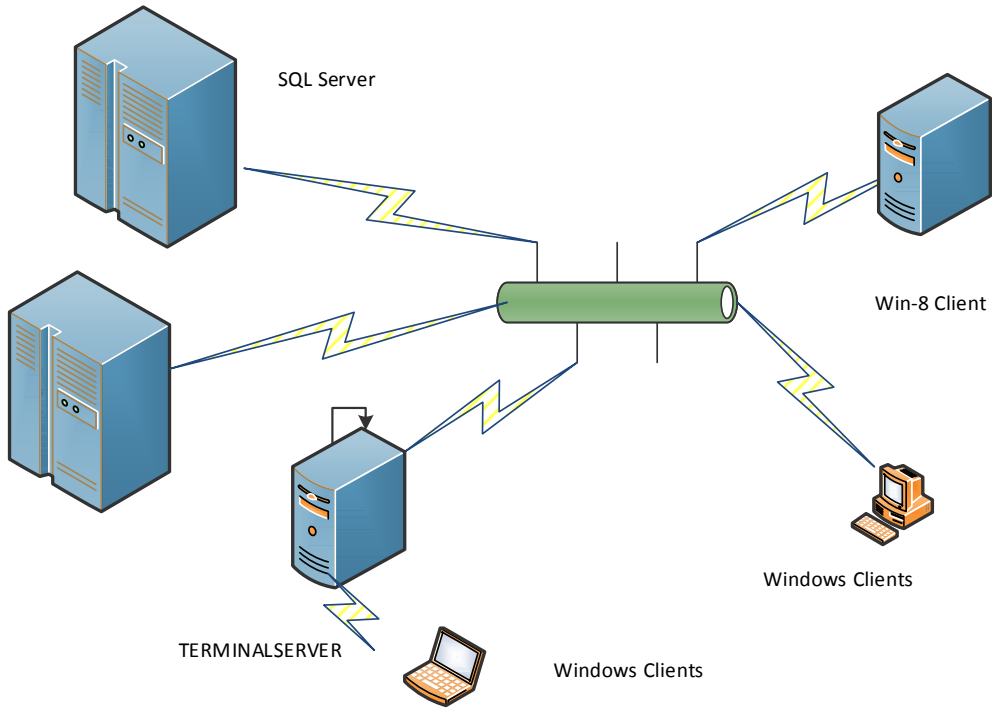
Network Topology

Basic network diagram



System Administration & Hardware configuration

Please review the specifications for system requirements in the SYSPRO environment contained in the installation notes and published on the SYSPRO Support Zone.

Function	
Confirm the minimum requirements.	☐
Confirm that Server + Operating systems conform to the min. requirements.	☐

Platform support

Review the supported platforms and system requirements for SYSPRO 6.1 to ensure that your environment meets these requirements. As new software typically requires more resources, ensure that you have sufficient disk space, memory and processor capabilities.

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Check List - Setting up SYSPRO and Windows Server

Server Operating System

☐ Windows 2012R

☐ Windows 2012 using Terminal Services

☐ **Windows 2008 R2 Server**

~~☐ Windows 2003 Server Standard Edition~~

~~☐ Windows 2008 R2 Server using Terminal Services~~

~~☐ Windows 2003 Server using Terminal Services~~

☐ 64-bit ☐ 32-bit

SYSPRO 6.1 SP1 is supported on both 32-bit and 64-bit Servers, running in 32-bit mode

_____ Service Packs Installed

Does the Server run resource intensive applications such as Exchange Server or any WEB related services

☐ Yes ☐ No

Version of Internet Explorer install on the Server

☐ Internet Explorer 11

☐ **Internet Explorer 10**

☐ Internet Explorer 9

☐ Chrome

☐ Other

Client Operating System

☐ Windows 8

☐ Windows 7 (with the exception of any Home edition)

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SQL

☐SQL Server 2014

☐SQL Server 2012

☐ SQL Server 2008 R2

☐ **SQL Server 2008**

☐64-bit ☐32-bit

SYSPRO 6.1 is supported on both 32-bit and 64-bit SQL Servers, running in 32-bit mode.

Do SQL and SYSPRO reside on the same Server?	☐ Yes ☐ No
Have SQL Memory options been configured?	☐ Yes ☐ No
Are the SQL databases and logs file on separate Hard Drives?	☐ Yes ☐ No

Service Packs Installed _____

SQL Collation

☐ Latin1_General_100_BIN

SQL db owner (if not 'sa')

Click here to enter text.

Office

☐ Microsoft Office 2013 ☐64-bit ☐32-bit

☐ Microsoft Office 2010 ☐64-bit ☐32-bit

☐ Microsoft Office 2007

☐ Microsoft Office 2003

Virtual Servers

☐ Windows Server 2008 R2 Hyper-V

☐ VMware

☐ Other

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Remote Connection software to be used

☐ Terminal Services

Terminal Server IP	*Click here to enter text.*
Servername	Click here to enter text.

Has the Terminal Server/Services been set up as a Primary or Backup Domain Controller?

The Terminal Server/Services machine should not be set up as a Primary or Backup Domain Controller because of the resource load that Terminal Server/Services places on the system.

☐Yes ☐ No.

Will the Terminal Services server contain the SYSPRO server programs?

The Terminal Server/Services machine will need to perform all of the functions that the client workstations normally perform, as well as being a server. Because the load on this server is heavy, it may be necessary to have more than one machine performing this task

☐Yes ☐ No.

☐ Other. Please provide details.

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