

Infor FMS SunSystems—Upgrade

V4 and V5—two options to meet your specific needs



Make a change for the better

If you are currently using an old version of Infor FMS SunSystems (V4.2.6 or older) then there are two options when considering upgrading, SunSystems V4.3 or SunSystems V5.

Infor FMS SunSystems V4.3 is an evolution of SunSystems V4.2.6. Many clients are still using SunSystems 4.2.6 and will continue to do so. Infor will continue to support those users, however, support for the underlying technology (Windows/SQL etc) means that effectively your system is unsupported necessitating an upgrade.

Infor FMS SunSystems V5 is a major re-write. Many of the familiar concepts still exist such as the unified ledger, transaction analysis, multicurrency etc. however there have been major enhancements as detailed below. SunSystems V5 is a very powerful technically advanced and functionally rich product.

Which version is most appropriate will depend on your business needs and budget.



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SunSystems V4 compared to V5

A move to SunSystems 4.3 can be regarded more of an upgrade than a move to SunSystems V5. The new software can be installed on your current hardware, providing there is sufficient space and the operating systems and database are compatible. The configuration and data are then migrated using tools within the software. End User Training is then delivered along with Systems Administration training. Once basic testing has been carried out and the balances have been reconciled the system can go live.

SunSystems V5 is significantly different to SunSystems V4. Many of the familiar concepts still exist such as the unified ledger, transaction analysis, multi-currency etc. However there have been major enhancements as detailed below. Therefore to move your system from SunSystems V4 to SunSystems V5 and take advantage of the new features should be regarded and approached as a reimplementation rather than an upgrade. It is also highly probable that new hardware will be required to run SunSystems V5.

Infor FMS SunSystems V4.3 features

Enhanced graphical navigation

A new menu system, based on a graphical tree structure, provides a clearer view and easier access to available functions, while retaining keyboard shortcuts for experienced users.

Global Security Framework

A common Global Security Framework has been adopted for Infor FMS SunSystems V4.3. This framework has also been adopted by other products throughout the Infor FMS SunSystems suite, providing a common user management interface and support for single sign-on. This simplifies both initial deployment and ongoing administration. The new Global Security Framework also provides Microsoft Windows® authentication support and superior functionality in the enforcement of password policies—a subject that comes up regularly in Sarbanes-Oxley-inspired audits of system controls.

Customer requested enhancements

As well as ongoing quality maintenance, this release includes 15 customer-driven enhancement projects, covering minor usability requests (such as fuller support for Microsoft Windows printing), as well as specific functional refinements.

Platform Updates

Infor SunSystems V4.3 adds support for two additional database management versions: Microsoft SQL Server 2005 and Oracle® 10g. SunSystems v4.3 delivers additional platform support updates, including support for Windows Vista® clients.

Future Directions

Infor FMS SunSystems V4 will continue to have regular releases on an approximately annual basis, maintaining the effectiveness of customers' investments in this product line by providing continued platform updates, quality increments, and ongoing enhancements to usability and functionality.

The next major release of SunSystems V4 will address the SOA enablement of key functionality within Infor FMS SunSystems V4. This will support the drive to extend the product functionality through interoperability with a range of Infor business applications, and provide the platform for evolution of the product through adoption of new Evolve components.

Infor FMS SunSystems V5

SunSystems V5 has all that can be found in SunSystems 4.3 with the addition of the following:

Usability

The data entry screens in SunSystems V5 can be tailored to the needs of the user. For example, labels can be amended to reflect the terminology used by the business, if Account Number is known as Client Number then the entry form can be amended to reflect this. Only the fields that are required will appear on the entry form, and the order in which they are required to be completed can be set. Business Rules can be set to validate the entries, and complete entries where appropriate.

Queries on accounts can be customized. The query criteria can be set. The display of the results is configurable so that only the data that is required is returned. The data produced via an enquiry can be drilled into and around, to locate source and associated transactions, without the need to run further enquiries. You can even drill down to associated images

A new menu system provides a much more attractive and usable facility, based on a model that is more similar to Outlook, with the standard menu access for each user group complemented by user defined choices for faster access to favourites, personalised queries and reports, and regular tasks.

Functions available to a role may be categorized into panes, allowing for simpler navigation trees. Standard functions may be parameterized to create new, extended menu functions,

The ability to select functions via a Shortcut has been retained, with a standardised 3 character shortcut provided.

SunSystems V5 has the ability to run multiple sessions thus eliminating the need to exit one function before opening another as is the case with SunSystems V4. For example, if in the middle of entering a transaction a supplier calls to enquire on the status of their payment the transaction entry screen can be minimised and the enquiry function entered.

Functionality

The functionality within SunSystems V5 has been greatly enhanced. Below are just some areas that have been addressed:

Analysis – the analysis within SunSystems V5 has been greatly improved. The limit of 50 characters for analysis within any area has been lifted to 150. Analysis dimensions no longer need to be set up for each functional area ie Transaction, Asset, Customer. They can be set up once and attached to the areas in which they are required.

Analysis hierarchies are available within SunSystems V5.

Analysis dimensions can be assigned to a hierarchy or moved to another simply. The hierarchies can be used for reporting from within SunSystems as well as Vision.

Journal Entry - A facility to automate the reversal of selected transactions and selected journals, including payment runs has been provided. Where errors have occurred, this feature will allocate reversals and their corresponding originals with a user-definable allocation marker, allowing these transactions to be eliminated, where required, from period movement statistics.

Budget Checking – has been greatly improved in SunSystems V5. Budget checking is carried out at the Journal level. Budgets are checked across up to 5 analysis dimensions as well as for the current period, previous periods or future periods

Multi-Currency – one of the biggest areas of development with SunSystems V5 has been around Multi-Currency. The Multi-Currency capabilities within SunSystems V4 were more than adequate for most users. However within SunSystems V5 the current 2 currencies (Base and Transaction) have now been increased to 5. The 3 main currencies that most clients use are Base, Transaction and a second base or reporting currency. The other 2 currencies have various applications. One of the most common is as a settlement currency where neither the base nor the transaction currency is used to pay a bill.

Integration

The integration capabilities within SunSystems V5 are another area that has seen major development.

Vision allows data to be extracted or uploaded with the same business logic and security as the other data entry methods. This can be done manually or automated using Automation Desk. It uses the scheduling system of Windows to pass data at a specified time and write success or failure output to log files.

In addition there is SunSystems Connect. SunSystems Connect is a comprehensive integration layer that enables integration to other applications via an XML interface. SunSystems Connect is an open integration toolset. It is designed to allow other applications to access SunSystems 5 and exchange data on a batch basis or in real time. Developed using Java, it publishes a series of components to the outside world that can be accessed via SOAP. This means any application that can read or write XML can link to SunSystems 5 application.

Security

Global Security Framework - Originally delivered with Infor FMS SunSystems 5.2.2, the Global Security Framework has been progressively adopted by other Infor FMS SunSystems and companion products to deliver, among other things, a secure single sign-on experience across adoptive products. The new Global Security Framework also provides Microsoft Windows® authentication support and superior functionality in the enforcement of password policies—a subject that comes up regularly in Sarbanes-Oxley-inspired audits of system controls.

Auditability - In response to audit requirements, including those in line with Sarbanes-Oxley, certain additional data will be captured on ledger transactions, providing a more complete audit trail. Auditors will be able to see when and by whom the transaction was created, and when it was posted and last amended. The system will allow multiple events to be captured.

Internationality

SunSystems has always been renowned as an international product offering specific functionality required in Italy, South America, Japan among others. SunSystems V5 is continuing to be developed to meet these and new international needs. Examples of some recent developments within SunSystems V5 include:

- Chinese reporting. Sample reports in the required Chinese statutory format will be developed and provided with the product.
- Chinese ledger, second reference. This was initiated by a Chinese market requirement for voucher numbering. It has been addressed as generic functionality.
- Chinese journals reversal. This was initiated by a Chinese market requirement for negative debits and credits. This has been addressed as generic reversal functionality.
- Japanese ledger entry. Ledger accounting has been enhanced to support calculation of Japanese consumption tax, using the accepted rounding methods.

Future Directions

The next release of Infor FMS SunSystems V5 will deliver quality and functional refinement, and additional platform support (including Windows Vista and 64-bit server operating systems). There will be a continued focus on usability and driving down the cost of ownership and usage. As with Infor FMS SunSystems 5.3.1, the existing control desk facilities will continue to be supported, providing an opportunity for a controlled transfer of functions by customers. This will also be a significant release in the adoption of Infor Open SOA.

Costs

At this stage it is difficult to give an indication of the costs as so much depends on the scope of the work, how many databases, amount of data, number of documents to be created etc.

For major systems i.e. multi-site, multi-country, SunBusiness modules, integration with other systems, it is recommended that an initial Planning Study be undertaken. This will allow us to fully understand the scope of the work to be carried out, discuss with you your preferred approach to the project, agree roles and responsibilities and agree timescales.

For systems on a smaller scale a meeting with one of our consultancy team may be sufficient for us to give an estimate of the time and resources required to carry out the work.



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