NEWSLETTER

Sage User Network

March 2009

Sage User Network 2008 Review

2008 was a difficult year for many companies, and this has obviously had an impact on attendance at our meetings. However, we are still gaining members and now more than ever we should be working as a network in every sense of the word to help each other through these challenging times.

We are continuing to try to hold meetings at as many varied locations as we can and I would like to thank anyone who has already hosted a meeting, or will be hosting one this year.

We are working even more closely with Sage than we have in the past; some of you have volunteered to take part in their "Product Improvement Plan" and you should all have received our last news email which included feedback forms for Sage's work stream reviews of the product.

We will also be starting Focus Groups for specific areas of the system   More details

Due to the severe weather we experienced in February, we were forced to postpone our February Meeting / AGM and it was rescheduled for 24 February at Winnersh.

Because of the date change we had very few delegates, however despite the low number of delegates, the meeting went very well and all the presentations were well received.

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Don't forget that all presentations from Sage User Network meetings are available online in the Members Area of www.SageUserNetwork.com

# Sage User Network Business Partner of the Year 2008

Jonathan Lassman, Sage User Network Administrator, presented the AGM results for the Sage User Network and the results of our 2008 Business Partner of the Year survey.

The winners, for the third consecutive year, were Datel. Jonathan presented the award to Andrew Pritchard who manages Datel's customer base and Account Management team.

2008 Business Partner Score Comparison
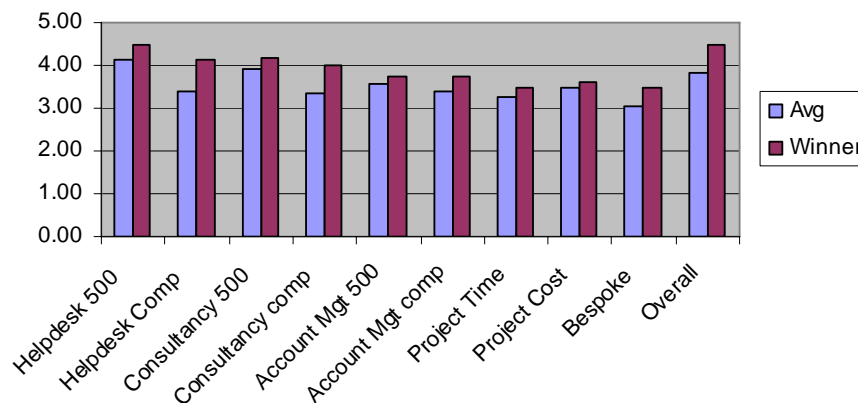
2003 - 2008 Results
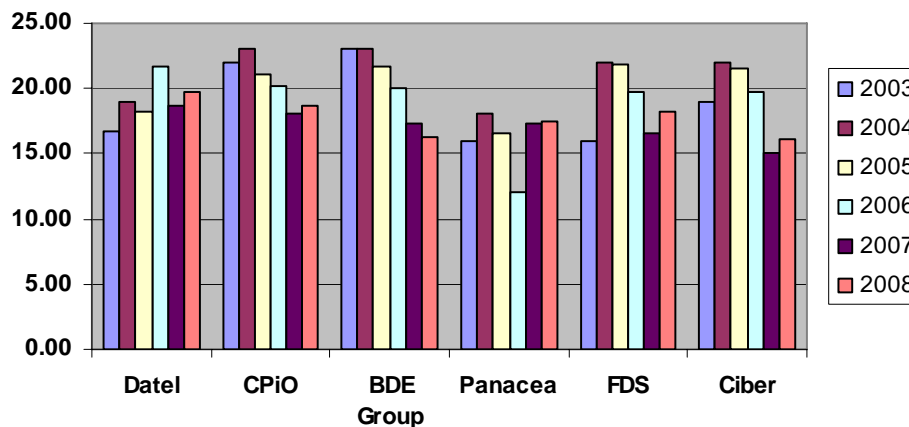
Full copies of all presentations are available on line in the Members Area of www.SageUserNetwork.com

Sage User Network Meeting and 2008 AGM

Sage Draft Strategy and Roadmap

Amanda Turvill, Sage Enterprise ERP Product Manager, explained that Sage have started to undertake some detailed market research to ensure that they are focussed on the correct areas for their products.

Sage 1000 v3.0

- **Creation of a true Sage 1000 "suite"**
    - ERP – covering usability, reporting and integration
    - CRM choice– CRM/Sales Logix
    - HR & Payroll

- **International vs Global**
    - French Language and Legals and Fiscal
    - German Language and Legal's and Fiscals, also Accreditation
    - Analysis on further European language dependant on target market

Sage 1000 v3.0 – Core Themes

- **Usability and User Interface**
    - Modern look and feel
    - Business process alignment
    - Suite blending - product to product and product to service

- **Interoperability**
    - Remove AIS embracing " open " standard
    - Flexible integration between Sage 1000 ERP and modules

- **Reporting**
    - Integrated reporting solution to deliver basic reporting

- **Sustained Engineering**
    - Legal and Fiscal requirements
    - System Maintenance

- **Migration Path for the future**
    - Message and Technology for Upgrade to both Sage 1000 2.3 and Sage 1000 3.0

The **Sage User Network DISCUSSION FORUM** is for the exchange of ideas and to get your questions answered; it will only be an effective resource if you, the members, use it on a regular basis

Sage User Network Meeting and 2008 AGM

Cherryl Holliday and Graham Hoyle explained the processes that Sage have put in place to review the system and how the Sage User Network can have an active role in the review.

The Approach

- **Usability and User Interface**
    - Deliver a more contemporary user interface that will keep the product competitive and up to date aesthetically, whilst new usability and efficiency concepts will improve the general user experience and assist new and existing users in improving productivity.

- **Interoperability**
    - Use open interoperability standards to allow more consistent and flexible integration between the core Sage 1000 ERP module and complementary productivity modules.

- **Reporting**
    - Provide an integrated reporting solution to deliver the basic (management and legislative) reports normally associated with a strong business management offering.

Work stream guidelines - modules

- Look at the functional areas across the work streams, have we left any area out

- Are all modules within this work stream still relevant to the customer base

- Which modules within this work stream could interact better with each other
    - Which modules may require interaction across work streams

- What is causing problems during implementation

- What is being logged with Support

- What are the functional "no-brainers"

Work stream guidelines - themes

- **Within this work stream what are the areas that require improvement**;
    - In terms of reporting
    - In terms of integration
    - In terms of UI and Usability

- **Why?**

- **In each of the 3 themes think in terms of;**
    - Whole areas or option specific
    - Any examples of improvement
    - priority

Over the next few months Sage will give you the opportunity to be involved in these reviews at a very detailed level – a great opportunity for you to help shape the product – we will be sending more details when they are available from Sage.

Full copies of all presentations are available on line in the Members Area

Sage User Network Meeting and 2008 AGM

Real Asset Management

Asset4000 by Real Asset Management in use at Fitness First

I would like to thank Richard Shaw, Real Asset Management, and the representatives from Fitness First for taking the time to attend the meeting and show delegates the benefits of using Asset4000.

Key drivers for implementing a fixed asset register

- Director's responsibility to safeguard the company's assets.

- Internal controls need to be implemented to ensure assets are protected from theft and damage.

- Disposals controlled and authorised.

- Fixed asset register was the basis for these internal control systems.

Why Real Asset Management?

- In 2001 upgraded to Sage Line 500 from Line 100.

- At this time started using Asset4000 (previously known as Britannia Software).

- Required a Fixed Assets solution that could be rollede out throughout the rest of the company in Europe.

- Looked at implementing Sage Asset Manager system, but this did not meet the requirements of the organisation.

- Real Asset Management is now working with Sage on creating an interface and we understand the two companies are in talks over a fully integrated system.

- This will allow invoices entered on Sage to automatically be created as assets in Asset4000, monthly depreciation calculated automatically and tasks such as transfers, relifes and disposals a lot more straightforward.

Integration with Sage

- Running depreciation periodically creates a journal that can be exported directly into Sage.

- Captures and posts all depreciation, transfers, relifes and disposals created in Asset4000 automatically using the nominal codes we created. These can be modified at any point in time as required.

- This has been easily set up to specifically meet our needs.

- Reconcile the two systems using Excel.

*The full presentation can be seen in the **Members Area of the website***

See more at www.realassetmgt.co.uk

Sage / Sage User Network Focus Groups

Sage is always keen to get feedback from the Sage User Network. We would therefore like to implement focus groups, which will concentrate on key areas of the system, as we develop our "suite" of products for the Enterprise market. The first group will focus on HR and after that groups will commence for both Commercials and Financials.

The aim of the focus groups will be to understand how users work with the system and what they need from the software in order to help them in their role.
We will also preview our latest development, so we can obtain ratification from our users, as well as detail on their future requirements. Resulting from the focus groups we will ensure that there is also an allocation within the roadmap for future user group requests.

Focus groups will be held on a twice yearly basis, each session will be half a day.

HR Focus Group

We aim to have this focus group kicked off in May 2009. We are looking for persons who perform HR tasks, from a junior to managerial position.

.
The format for this session will be as follows:

- Introduction
- Feedback from HR representatives
    - Current HR software challenges
    - Future HR software requirements
- Demonstration of the product to get user feedback on direction/roadmap
- Actions/Moving forward

Please note that users do not need to be using a Sage HR product to attend this group.

If you would like to join one of the Focus Groups please email Nicole James or call on 0118 9813223

Each group will be restricted in numbers and places will be allocated on a first come basis

We will also be asking for a volunteer to help lead each focus group

Hints & Tips

A historical bug in the Telesales module means the order balance on the sales ledger customer account could be updated incorrectly. This field is used for credit checking sales orders at order entry.

Running the sales archive routine should fix it but you this is not exactly an everyday task.

Sage created an option to run to manually correct any order balances that have got out of sync - a bit like the stock recalc option.

The option is called 'op_obal_update' and should be created with a command parameter of 'opmant O'


Option	Description	Command
op_obal_update	Customer Order Balance Update	opmant O
op_order_enquiry	Sales Orders	openq
op_order_entry	Sales Orders	opord
op_order_prod_anal	Sales Order Product Analysis	oppran
op_order_status_rep	Sales Order Status	opstat
op_override_credit	Override Credit-Stopped Orders	opcred
op_pick_by_list	Despatch By Pick List	opdesppk
op_pick_conf_entry	Pick Confirmation	opord P
op_picking_lists	Picking Lists	oppickle
op_price_enquiry	Prices	oppenq
op_price_list	Price Lists	oplist
op_price_list_update	Price List Update	opprupd
op_price_recalc	Price Recalculation	oprecal
op_price_update	Price Update	opprice OP
op_print_quotations	Quotations Print	opquote
op_print_reports	Print Spooled Reports	sqm local tetra op
op_quotation_entry	Quotations	opord Q
op_reclaim_entry	Credit Reclaims	opdord R
op_release_orders	Release Stopped Orders	oprel
op_remove_orders	Archive Invoiced Orders	opmant
op_reorganise_orders	Archive Invoiced Orders	opmant
op_rep_4	Reports	
op_rep_menu	Order Entry & Invoicing Reports	
op_respool_shipnote	Shipping Note Re-print	opshippr R
op_rolling_stock	Predict Future Stock Balance	opmrstroll

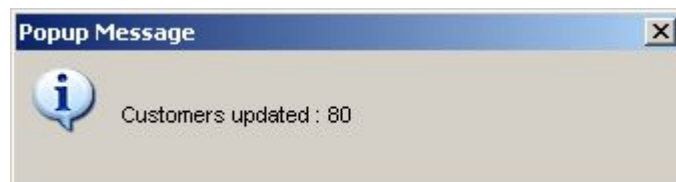ESC - Cancel   ENTER - OK   Print   CTRL+ENTER - Search...

Hints & Tips

When running the option you should get a screen as below - not the Sales Ledger archiving screen.
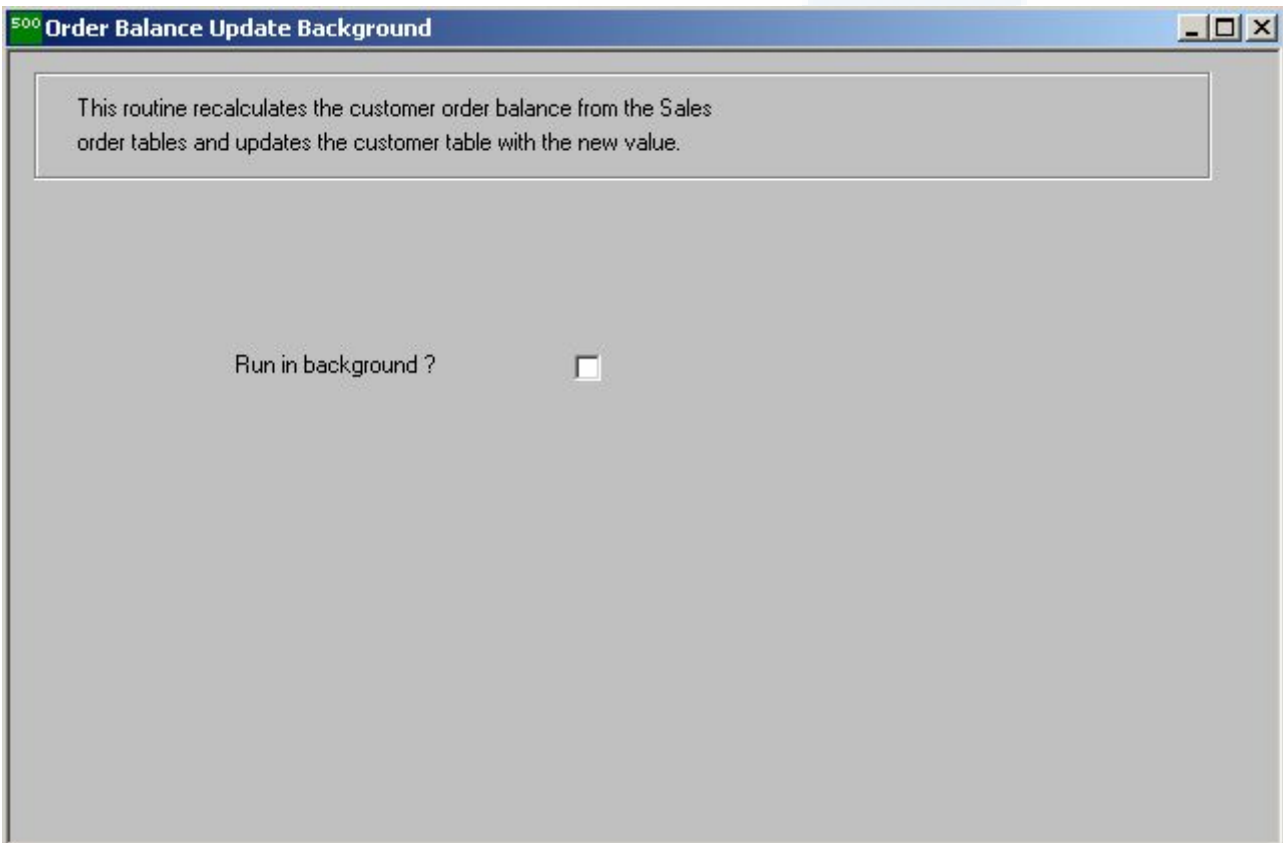
You are shown how many customer records are updated but as is consistent in L500 nothing of much use is recorded in the system log nor is an audit trail produced.

Do you have any Hints & Tips for the newsletter?

If you have gems of knowledge that may be useful for other users, please let us know so that we can share them in the next edition

Sage User Network Notice Board

Who Are The Experts?

At a recent Business Analyst forum, we were asked "who are the experts?" Who knows what legislation is coming up and what impact it will have on our business, our systems?

In some instances, a Business Analyst could well be the expert in their field with regard to legislative requirements but we recognise that this is not always the case. Within the Sage group there are experts who are closely aligned to Payroll and Human Resources and experts aligned to the financial arena, or are deemed experts in manufacturing, supply chain management or other specific area. These experts keep a close eye on up coming legislative requirements and are aligned to various organisations outside of Sage such as HMRC, BASDA, DDA, etc. In addition, our Business Analysts keep their eye on the Data Protection Act, Irish Department of Social and Family Affairs, Computer Misuse Act, Sarbanes-Oxley Act to name just a few, but we do question, are all Business Analysts tuned into everything?

If you are aware of legislative changes that may affect your business sector, we are always happy to hear from you. If we already know about it, we can reassure you, if we do not, it gives us the chance to be ahead of the game. Email us through Nicole James if you want to inform of us of something you believe affects your business and Sage solution.

Cherryl Holliday
Senior Business Analyst
Enterprise Division
Sage (UK) Limited

11 June 2009 Meeting

The topic of our next meeting is "How to Beat the Credit Crunch"

If you have any ideas on how to beat the current recession, either with or without the use of Sage Line 500, please can you let us know. We would like this to be a fairly open agenda, preferably with members presenting 10 – 15 minutes each on a helpful hint to cut costs/time/reduce wastage etc. It does not have to be using Line 500; this is an opportunity to help each other by passing on knowledge.

The key session at this event will be presented by Paul Stobart, Sage CEO, UK and Ireland Region

Sage User Network Notice Board

Dates for your 2009 Diary

11 June - Meeting/Awareness Day
University Hospital Birmingham

17 Sep - Meeting/Awareness Day
Sage, Winnersh

8 Dec   - Meeting/Awareness Day
Location tba

Agendas will be published on the website
Book your place

Committee Meetings

28 April - Accantia Health and Beauty, Solihull

19 Nov - Sage Winnersh

If you are interested in joining our committee, please email Nicole James or call to discuss on 0118 9813223

Newsletter Articles

Please can you send any articles for the next newsletter to Nicole James. Anything you would like to be published is acceptable – letters to the editor, user stories, hints & tips, comments on the service the Sage User Network provides.

Member Details

If you change your contact details, company name, system etc, please let us know so that we can keep our records up to date.

CONGRATULATIONS

to Simon Taylor, Nelsons

for the most posts in the Sage User Network Discussion Forum

Thank you for participating

KEEP POSTING! Next quarter it could be you!

Sage User Network Notice Board

LinkedIn

LinkedIn is a business-oriented social networking site founded in December 2002 and launched in May 2003 mainly used for professional networking. As of February 2009, it had more than 35 million registered users, spanning 170 industries.

The purpose of the site is to allow registered users to maintain a list of contact details of people they know and trust in business. The people in the list are called Connections. Users can invite anyone (whether a site user or not) to become a connection.

A contact network is built up consisting of their direct connections, the connections of each of their connections (termed second degree connections) and also the connections of second degree connections (termed third degree connections). This can be used to gain an introduction to someone you wish to know through a mutual, trusted contact.

The "gated-access approach" (where contact with any professional requires either a preexisting relationship, or the intervention of a contact of theirs) is intended to build trust among the service's users. LinkedIn participates in EU's International Safe Harbor Privacy Principles.

The searchable LinkedIn Groups, feature allows users to establish new business relationships by joining alumni, industry, or professional and other relevant groups.

We have setup Sage User Network as a group and currently there are 40 members from around the world from end users, reseller or Sage themselves. You do not need to be a member of the user group to join the LinkedIn group. The group allows questions to be posed for discussion online. We currently have a discussion about what projects are being undertaken and how to crack reporting in Line 500.

If you are not already a member take look and see, if you are already a member of LinkedIn.

Please join the group and feel free to contribute to the discussions.

Next meeting: 11 June 2009

"Beat the Credit Crunch"

University Hospital Birmingham