ISTUG NEWSLETTER

A Sage Approved organisation

The only independent newsletter about Sage Enterprise related products. April 2004

Note – this newsletter is now available online in our Members Club, where you will also find all the speaker presentations, information about enhancements, and many other useful pieces of information.

IN THIS ISSUE

ISTUG GOES GLOBAL!

We pride ourselves on being an international independent group and this is now starting to take shape on a larger scale. We have recently been contacted by Sage Enterprise Solutions South Africa, Dubai and New Zealand, who all wish to launch ISTUG on our behalf in their respective territories this year. Obviously this is an opportunity we cannot afford to miss. We have therefore agreed to provide the Sage international offices with support and access to our website, in order for them to can gain a better understanding of who we are and what we do. This will in turn help them promote ISTUG on our behalf internationally. As soon as we have more information on this we will obviously let you know…….watch this space!

Dates for Your Diary in 2004

04/05/04 – Committee Meeting (SES, Winnersh)

11/05/04 – Awareness Day 1 (UHB, Birmingham)
13/05/04 – Awareness Day 1 (SES, Winnersh)

07/07/04 – ISTUG Meeting (SES, Winnersh)
08/09/04 – Committee Meeting (SES, Winnersh)

18 & 19/10/04 – 2 Day ISTUG Conference
(Wychwood Park, Crewe)

24/11/04 – Committee Meeting (SES, Winnersh)

The agenda for all the above meetings, where relevant, will be published on the ISTUG website at www.istug.com. Full online booking facilities exist, non-members may be asked to pay a guest fee, where this is the case full details will be given at the time of booking.

Sage Line 500 v5.5

Sage offers return on investment

Research suggests that just about every UK organisation has some form of accounting or ERP software system. But companies are now looking for greater IT integration by switching to integrated solutions or upgrading their existing systems – driven by growth, expansion or technology. The challenge in this maturing and increasingly competitive market is to offer you more depth and breadth for your money.

With this in mind, Sage has developed its product strategy on the basis of enhancing the customer experience, extracting dynamic business information, developing market specialisation, enabling connectivity and delivering technology.

Sage has been undertaking new product development for over 20 years – and Q1 2004 will see the latest release of our flagship ERP system Sage Line 500 version 5.5, which encompasses a range of new modules aimed at giving your organisation improved return on investment from your current system.

Gavin May, Managing Director of Sage Enterprise Solutions Division, commented: “Sage is an industry standard for ERP excellence. Our customers are demanding more dynamic, accurate and timely business information coupled with greater industry-specific functionality. Our latest release integrates these best practices into one easy, low-cost solution.”

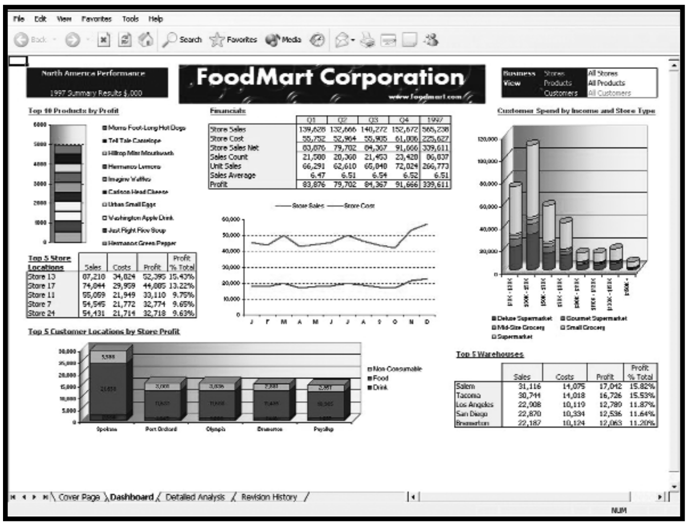
Addressing the core business processes

Whatever the size of your organisation, technology is becoming increasingly important in managing a profitable and successful business. Controlling processes takes a powerful and reliable business performance management software solution.

Sage acknowledges that partnerships and alliances are key to delivering a surrounding portfolio of integrated modules that enhance the solution and provide you with greater value for your investment.

As part of this strategy, Sage is launching a number of new modules within Sage Line 500 version 5.5, addressing key business areas:

Business Intelligence



1. Business Intelligence.

Sage can now offer business applications such as planning, forecasting, scorecards, sales and financial reporting, together with end user analysis. Sage Business Intelligence is designed to exploit the simplicity of a spreadsheet and the scalability and robustness of a corporate database in monitoring business performance.

It provides a reporting and analysis solution. Reading and writing to one or more OLAP cubes, it delivers ‘one version of the truth’.

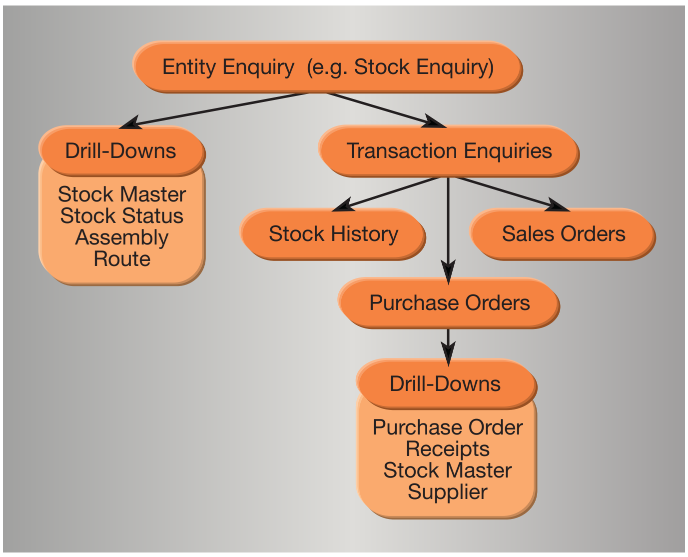
By running a plug-in to Microsoft Excel or as part of a web browser, it can also exploit the existing skills of staff. Solutions based on Sage Business Intelligence aim to be intuitive to use, easy to build and cost-effective to deploy across the business.

Sage believes that with Sage Business Intelligence, the need for expensive third-party proprietary business intelligence tools has been removed. It offers:

- Analysis – users can produce simple drill-down queries through to highly formatted and complex queries. Multiple queries can be linked on the same worksheet.
- Collaboration – output from any of these forms of analysis can be held in dynamic or stock reports embedded within Microsoft Office.
- Advanced analysis – the software provides data visualisation techniques, essential in data-intensive applications where relationships between data items need to be explored and not simply assumed.
- Report Packs – users can automatically build and distribute report packs in Excel or HTML format via email or their corporate portal.
- Exception Reports – to identify both over and underperformance, critical in scorecard applications.

With Sage Enquiries, Sage Line 500 allows users to build up enquiries using data from any of the tables in the system (see Figure 1) – combining the functionality of Report Writer with the ease-of-use and familiar look and feel of existing Sage Line 500 enquiry programs.

Figure 1: Sage Enquiries Functionality



2. Customer Relationship Management.

Many companies recognise the need for accurate customer information, but few use a comprehensive CRM solution. SalesLogix from Sage provides a CRM solution for salesforce automation, campaign management and customer support. It integrates with Sage Line 500 to provide greater visibility and immediate access to information, effectively providing a single view of customers.

Using SalesLogix as part of a Sage Line 500 ERP system, companies can:

- More effectively manage the sales cycle.
- Track and measure marketing campaigns.
- Resolve customer support issues more rapidly.
- Gain remote system access from anywhere.
- Link back-office information to customer data in a dynamic way.

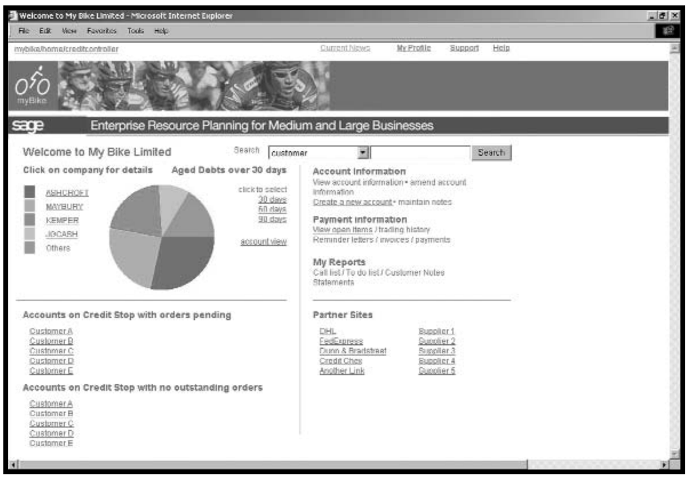
3. Improved productivity and ease of use of the system.

A new release of the widely used Sage Web Client allows users full access to a Sage Line 500 system using a web browser. The Web Client provides a new look and feel to Sage Line 500, which can be implemented with minimal disruption to the business, allowing access to the ERP system at any time from anywhere.

In addition, Web Portal enables companies to replace and customise the Sage menu system, making it faster and more efficient for users. It can link directly to any specific function or combination of functions in Sage Line 500 and it allows users to view and drill-down to specific information, thus providing an intuitive graphical interface. The portal adheres to all the login security set up by the system administrator.

The Web Portal toolkit also allows for integration with other software products – for example online credit checking – enabling users to create a management information dashboard that can present a dynamic picture of the key performance indicators for the business, a department or a specific job role.

Web Portal



ISTUG 2 Day Conference 2004

The first 2 day ISTUG Conference will take place later this year and we hope that you will join us at this unique event. There will be third party presentations, user case study presentations, an exhibition area and the usual SES Product Update. In addition, we are hoping to have an SES walk in “clinic” with SES Module Experts and on-line systems to look at your queries and issues on both days. There will also be evening entertainment and the normal opportunities for networking and meeting with SES staff and other users.

The event will take place at Wychwood Park, near Crewe on 18 & 19 October 2004.

We hope to see you all there – At a cost of less than half a day’s consultancy, can you afford to miss out?

4. Increased functionality.

Sage Paperless for Sage Line 500 enables users to automatically fax or email printed documents – such as customer invoices and purchase orders – directly from core business applications. Automatic faxing is integrated into the ERP and accounts and finance applications.

Sage Paperless includes:

- Forms – removes the need to edit forms used for preprinted stationery, which can often be laborious and timeconsuming. The forms extraction layout allows the user to associate fields with text, which is then converted to produce an invoice or despatch note, for example.
- Fax – allows the user to send business documentation directly to a customer or supplier via fax, without the need to print and manually send it.
- Mail – as per the fax option but uses email as the transportation method.
- Docstore – allows the user to archive or save transactional documentation. The documentation is saved as a PDF file and stored in the Sage TCR database.

With this in mind Sage, in partnership with its Business Partners, will be offering a number of interesting and affordable promotions to help you and your organisation upgrade to Sage Line 500 v5.5.

For more information please contact your Business Partner.

If you are unsure who your Business Partner is or would like to talk to Sage please contact us on 0118 927 0257 or at sesinfo@sage.com.

Recalculate Stock

Background

Stock Recalculation
At a previous ISTUG Meeting, DSIG breakout session, someone raised the topic of Stock Recalculation. I think the question was something like "Why don't Sage fix the problems causing Stock Recalculation errors, rather than supplying the program to correct them?".

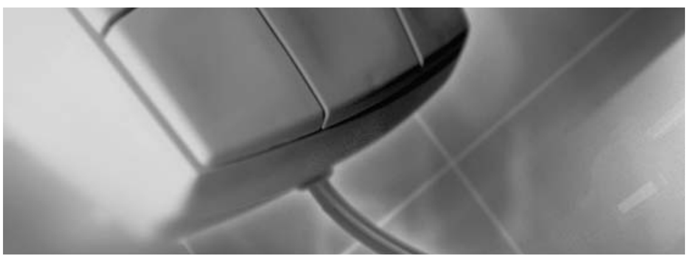
A show of hands confirmed that virtually everyone in the meeting suffered from the problem. The Sage representative at the meeting expressed astonishment at this and claimed to be unaware of the problem. However he promised to investigate and get back to us. To the best of my knowledge this never happened. I know from talking to other people at ISTUG that this problem still affects a lot of users.

Could Sage give us a status report on this?
Perhaps answering the original question?
Informing us if there is any likelihood of the problem being fixed?

Possible Causes

- The data errors may arise for a number of reasons :-
  - System crashes - particularly in C-ISAM environments where RBRF is not possible
  - User aborts - incorrect exit or reboots
  - User interfaces, data imports, 3rd party software, bespoke programs etc. which do not correctly update the required tables and fields in the Sage database
  - Programming errors and errors in defining commit statements
  - These are all fairly self explanatory, if a FIFO system a stock movement will update stock records, order records and batch records plus some cross reference files, if some but not all of these are done an imbalance is the end result.

- Invariably, the problems occur in 'live environments' which make detailed fault finding difficult due to:-
  - the need to continue working
  - impossibility of running tests and trials in a live environment
  - time and effort involved in trying to mimic all live actions in a safe demo environment
  - In addition diagnostic work that has been done in the product in the past also has to be 100% correct and would not cover any third party applications (including the ADS modules as these were independent at the time the diagnostics were added). On sites investigated in detail this has not been entirely successful, one of the issues of replicating these problems has also been replicating the volume and multi-user activity both of which may play a part in these problems.



R&D Approach To Resolving These

- The R&D approach to this is to want to find the issues and fix the problems, the Stock Recalculation program was designed to check the consistency of the fields held on the stock master file (stockm) with the sum of the corresponding order lines, batches, allocations etc. The program was not developed as a response to problems of imbalances being reported, it was in fact developed as part of the original Chameleon In Manufacturing release. At the time was an essential part of recovery from a program crash as the product was ISAM only and therefore failed multi-record updates caused by a crash was a specific issue and this program was developed in response to this issue. In addition it was viewed that a way to validate your stock figures was a useful part of the module.

- Where an error is found, the program can reset the stock master fields after a Sage supplied password has been entered. Password protection was ironically introduced in an effort to gauge the scale of problem in the field after anecdotal evidence of problems in the field. As a result of the requirement to raise a log to get a password a number of issues were then logged and many were traced and fixed. In addition some on-site investigation was carried out on at least two sites in 91/92. Over the years passwords were just made freely available and in advance and therefore the visibility of issues to R&D has been lost.

- Until this update R&D are sheltered from the issues that seem to exist in the field. A search of the SLX database has turned up only a single call relating to this issue in the last 2_ months. In the last two years about 8 issues have been fixed that would fall into this category. It is accepted that investigating these issues is quite difficult because they often occur in high volume/multi-user environments. However the size of the product and the nature of these issues is such that they are unlikely to just be spotted in the code and they are difficult to replicate in a test/demo environment.
  - Narrowing down of the problem is really required for the issues are investigated at Sage, the following steps would assist
    1) Record keeping – maintaining a list of the products that are out of balance and by how much. Investigation of the transactions carried out on the products can begin to narrow down the search in the source code. Are the items sold, manufactured, purchased or a combination of all three.
    2) Use of the generic auditing module to record the transactions taking place e.g. all changes to the allocated_qty, this in conjunction with 1) can allow a pattern of events to be seen.
    3) The provision of a debug binary from Sage. Sage has installed Debug binaries on some sites, this has not always been successful when investigating the whole product, it has however been successful in some cases where the search area has been narrowed for a limited part of the product and a limited number of stock items.

Please note that this issue will be discussed at the next ISTUG Committee meeting with a view to putting a process in place which would enable members to log their issues with ISTUG. We can then collate the information and forward it to SES.

Changes to the MBE Process

Those of you who attended the February meeting will recall that the MBE Voting Process was reviewed by Sheila Brisland outlining the main changes to the process.

As the current list has more than 250 MBEs, it was agreed that the list for voting will be reduced to make the process easier for all involved, although the initial list may be a little longer than the target number to account for recent logs.

New MBE Voting process (bearing in mind that 6 months generates approximately 70 MBEs):

- One voting list every 3 months
- As per usual, MBEs voted 1-10 will be are passed on to SES
- Only MBEs that ranked between 11–20 will be given a second chance and added to the next voting list along with all the new items logged
- The new lists should typically have 35 - 50 items

Obviously, if a specific MBE is not in the top 20 and therefore drops off the list, there is the opportunity to re-log it with SES.

We will update you as soon as we have more information on expected dates for the next list.

ISTUG MBE Status 27/01/04

MBEs included in Line 500 v5.5 and Line 200 v5.5

206738 PO Print date and time printed on Purchase Orders

216000 JC Provide F2 browse on customers in Job Entry

217152 PO/EI Make comments available on GRN screen and print

220470 AR Print currency code and description on AR Statements

220640 OP Give warning message if negative value entered in Sales Credits

220776 PO Provide function key to display previous order in PO enquiry

221301 OP Force F6 numbering in Sales Orders, Sales Invoices and Sales Credits

221303 PO Force F6 numbering in Purchase Orders, Purchase Receipts and Purchase Invoice Batch Numbers

222724 OP Allow entry of due date against service lines

224300 ST Provide the ability, within stock transaction browse, to display only items with a quantity within the batch, as the default. The user must choose to see zero quantity batches

225043 OP The key OPPLPOINT only reacts to a price line set up in the 'Local' Price List i.e. at the Delivery Address. It does not look up the customer structure to use the price list of the Invoice, Statement, or Group Customer. The enhancement rectifies this and provides the user with the ability to point to price list within the chain

228474 PO Allow a function key in "Orders by Supplier" Enquiry to reverse the sequence of orders to latest first

228886 PO Purchase Order Receipts are now written to the system log (this is not switchable)

231088 OP/AT Add promised date of SOP order detail line to Predict Future Stock display

233390 WO Print works order comments on works order pick list

237111 OP Sales Order Enquiry now provides a previous order button

Items found to be existing Functionality

206738 TL Allow Tetra Link built in function AfterPLinvoice/EndPLinvoice to pick up due date form PLPAYTERMS syskey/supplier Payment Term field.

233547 OP Add word "Reprint" to SOP invoice re-prints

MBEs to be included in next release

222072 AR/AP Open Item enquiry screens in AR and AP to display currency exchange rate.

218376 OP/PO Form for entry of project codes to be automatically displayed

222732 OP Enquiry only option for price lists

221301 OP Force F6 numbering in Sales Orders, Sales Invoices and Sales Credits

230280 AT Provide a quick quote option for pro-formas in Telesales

206902 RW Would like Run Batched Reports improved, so that reports can be chained together with run time prompts on the reports, and that batch name can be created as an option, and therefore added to the menu.

228746 OP If the header required date is changed and order lines exist then the user should be presented with a pop up asking if existing order detail CRSD dates should be changed. Obviously, any new details would default to the new header date.

236945 GL Make the F2 search that is present within the Browse of detail lines in GL Special Reports to work. They would like it to search on the description line.

231485 OP When a sales order is being deleted, ask the operator for a reason, as to why it's being deleted. And add the reason (comments) as an internal comment to the end of the order before it is deleted.

MBEs rejected as too complex

217388 ST Inter-Warehouse transfers to allow transfer of items with different UOMs.

220580 ST Allow entry of a negative amount on Production Issues. Consumable stocks may be booked out to a production department, rather than to a specific works order to allow easy tracking of usage. However, when consumables are returned to stores unused, there is no way of creating a credit to the same cost centre.

230310 AP Payment List Maintenance. Allow the user to selectively add new items to the list rather than have to delete the whole list and start again

240259 PQ When running consolidated purchase requisitions where one order is generated per supplier, transfer comments to the purchase order. Requires a system key to control this and would be 'all or nothing'.

Did You Know?

PC Support

www.realvnc.com is a really useful utility which allows you to take remote control of your servers or users PC's to perform maintenance or support as if you are in the cold server room or at their desks.

Unlike PCAnywhere, vnc is freeware and you can even take control of your servers from a palm pilot. Apparently it can also be loaded onto Unix servers.

It is currently used in a company that has about 200 pc's/servers and laptops across 5 sites in 3 countries all with vnc loaded and it saves a considerable amount of support time. When users are trying to explain a problem you can take a look for yourself and take control if necessary. It has become affectionately known as "Hacking Into their PC's", the support team can take a look directly at the problem without the user having to explain.
VNC does not slow down your PC and you do not need very fast lines between sites to operate it.

Purchase Order Completion

The option called po_completion (which may have to be created as an option in your Sage Enterprise system) allows a user to mark the header of a purchase order as "C" completed (normally the status is either P or 9), this allows the purchase order to be archived. Sometimes purchase orders can't be archived because of anomalies in quantity received and quantity invoiced, this option makes it much easier to archive these orders. If you need more info on this please contact ISTUG.

Reminder

Please can I remind you that we are run purely on member subscriptions and without them, we would not be able to provide the service that we do to our members.

Recently we have had many subscriptions paid late, or have had to send reminders to members – we do not like having to do this. If the invoice from ISTUG should be addressed to someone other than the ISTUG member, please let us know; this will prevent invoices from "going astray" or not getting through to the correct addressee.

There are also many of you who have not yet returned your membership details forms to us. Even if the details are correct, please return the documents to ISTUG so that we know we have the correct information on file.

Many thanks for your help.

Nicole James
ISTUG Technical director

ISTUG Committee

If you would like to be more involved with ISTUG then why not join the Committee? Our next meeting is on 4 May 2004 at 10:00 at SES, Winnersh – you can book your place on line at www.istug.com/events, everybody is welcome.

If you would like to find out more about the Committee, or any other ISTUG meetings, contact Nicole James on 0118 9813223 or at njames@istug.com.

OUR MISSION STATEMENT

"To be the Independent Organisation that represents users of Sage Enterprise products."

YOUR COMMITTEE - ISTUG Members

Administrator
Jonathan Lassman, phone 01438 717764, Fax 01438 712157 or email jlassman@istug.com
Technical Director
Nicole James phone 0118 981 3223 or email njames@istug.com
Chairman
Gordon Hancock of University Hospital Birmingham (gordon.hancock@uhb.nhs.uk)

Details of all serving committee members can be found on the ISTUG web site, www.istug.com
ISTUG HELP LINE – Phone 0118 981 3223
or email njames@istug.com.

The ISTUG office is open daily from 09.00 to 17.30 for your calls; a message facility exists when the office is closed.

Newsletter Articles

Please send any articles for the next newsletter – such as: letters to the editor, user stories, hints and tips, comments on ISTUG and the way we do, or do not, fulfil members requirements – to Nicole James, ISTUG Technical Director.