ISTUG NEWSLETTER

A Sage Approved Organisation

The only independent newsletter about Sage Enterprise related products.   October 2003

Note - this newsletter is now available as an online view in our Members Club web site with direct links to the speaker presentations, information about enhancements, and many other useful pieces of information.

IN THIS ISSUE

- A Few Words From Your New Chairman

- Dates for Your Diary

- Tailoring your System

- Archiving

- September 2003 ISTUG Meeting:

  - Profit from Mobile Productivity

  - Changes to the BACS System

  - SIG Sessions

  - SES Reseller Accreditation Programme

  - Linux Case Study

  - Month End Processing – Hints & Tips

  - SES Roadmap Update

- Did You Know?

Join ISTUG

If you are not yet a member of ISTUG - you are not finding out about the things that could benefit your business, and quite possibly reduce your IT costs.

Visit our Open Web Site at www.istug.com and JOIN TODAY.

A Few Words from Your New Chairman

My name is Gordon Hancock and as your new chairman I would like to thank Henry Waters, who has had to step down due to work commitments, for all his hard work and dedication to the group.

A bit of background about myself…

I am employed as Systems Manager at the University Hospital Birmingham, one of Sage's biggest direct customers. I have personally been a user of the Sage product (and its predecessor Tetra) since 1996, with lots of experience, good and bad, at dealing with Sage.

However, this is not about me it is about YOU and ISTUG.

Ladies and Gentlemen, may I remind you that this is YOUR user group. Without YOU we would not exist. We are however suffering from APATHY!

There are approximately 300 members and it seems that you are happy to leave the future of the group to a dozen of us, having to guess what you want. You are all content to attend 3 or 4 meetings a year, but do not seem to put any effort into making the group effective for us all.

We would like YOU to get more involved – yes we know it takes time, yes we know it takes effort, but without YOU making this User Group STRONG we're nothing.

We need YOU to get involved with the Special Interest Groups, not just today and at these meetings but all year round. We need YOU to tell us about your problems – and YES we ALL have problems, so no need to deny it. Tell us about your problems that have not been resolved. Let us help you - to help yourselves.

Ladies and Gentlemen, it's up to YOU to get involved – without you we cannot get any stronger, but with you we can become a huge force to be reckoned with. Get more involved with the Special Interest Groups, get more involved with ISTUG.

Dates for Your Diary in 2003

15/10/03 – FSIG Meeting

15/10/03 – Committee Meeting

22/10/03 – Reporting Awareness Day (venue SES)

10/12/03 – ISTUG AGM (venue SES)

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.

Tailoring your system

There are a number of features within Sage that enable you to tailor your system:
• Forms Editor to modify Screens
• Forms Editor to modify Reports
• Menus
• Even Messages which can alter the Function Keys on the Action Bar

There is an article on how to do it at http://istug.fast.net.uk/faqsm.htm called Forms Editing.

Caution

These are great but should be used with caution. If you make lots of changes you may have to repeat them all when you upgrade to a new version. Sometimes they can be carried forward in the formset but not always. If, for instance, you change an input screen, and Sage change that screen you have to:
• reapply your changes
• or lose them
• or not take the new screen.

Similarly if you change a standard report because of a field size, e.g. your sales total shows as ******** because it is too big for the display field, when the new version is installed the same problem will recur.

Document

The answer is to keep a detailed list of any changes you make. We have a Spreadsheet with separate pages for Screens, Output Forms, Messages. We know exactly what we have to do in order to maintain our system.

Initially our system was not documented. A lot of people were working on it to get us live as quickly as possible. Our reseller never suggested documentation and never documented what they did. Our first upgrade was a nightmare.

Reseller of the Year 2003 – Vote Now!

The ISTUG Reseller of the Year 2003 voting facility is now open. This, as always, is your opportunity to tell us how your reseller performs and the quality of the service they deliver.

All the members of the reseller channel watch with a great deal of interest to see the verdict you deliver. This is yet another area where YOUR VOICE REALLY MATTERS. The voting process is open to all companies that use the Sage Enterprise Solutions Division product range.

Submit your vote online in the News section of the web site at www.istug.com.

ISTUG Satisfaction Survey – let us have YOUR views

Please take a few minutes to complete this survey – we need your views to ensure you continue to get good value from your membership.

You can also complete the survey online at www.istug.com/news.htm.

ARCHIVING

What is it?

Archiving is the process of moving recent historic data out of your production database into a separate data area. The historic data is still available for enquiries from the application.

Why do it?

The more lean your online dataset the more efficiently your system will run, especially Report Writer reports that may perform full scans of the tables eligible for archiving.

What can be archived?

The application provides programs to archive:
• GL Transactions
• AR Transactions
• AP Transactions
• Completed Sales Orders
• Completed Works Orders

How often?

This is a matter of user preference, some system managers prefer the little and often approach archiving, perhaps once a quarter. I keep about two years data in the production database, two years archives online in a separate database and the rest on tape.

Planning an archive strategy

1. Decide on frequency and archive format
   If you are likely to reuse order numbers frequently or there is a likelihood of suppliers reusing invoice numbers it is better to create archives quarterly to avoid duplicate index (DBI_WRITE ERROR –3) problems.
2. Naming
   File names should be meaningful – you only get to use between four and seven characters depending on the module. So use something informative like: wo99Q1 – works orders for 1999 Q1. When the system creates the archive set it will append code letters to the table names to identify header, detail files etc.
3. Storage
   SThink about keeping the archives in a separate data source – this can reduce overheads on the database engine.

Storage location is controlled by system keys:
• SOP – Six character names – must start with a letter on RDBMS systems.
• OPARCHDD – datasource of the storage location
  OPARCHIVE – Yes/No is archiving enabled
  OPARCHSET - Generic name of the archive set or * if free naming in use
• GL – Seven character names – must start with a letter on RDBMS systems
• NLARCHDIR – datasource of the storage location
  NLARCHFILE – default file name of the archive leave blank for free naming
  NLARCHIVE – default number of periods to KEEP on line
• AP/AR – Four character names – system prepends SL or PL to name

• PLARCHDIR – datasource of the storage location
  SLARCHDIR – datasource of the storage location
• BM – Six character names – must start with a letter on RDBMS systems
• BMARCHDD – datasource of the storage location
  BMARCHIVE – YES/NO is archiving enabled
  BMARCHSET – Generic name of the archive set or * if free naming in use

Datasource names
If the storage location systems keys are left blank the archives will be stored in the production database. To change the destination you must first ensure that the datasource exists in your database and is configured into the todbc.ini file in the master directory.

The datasource format is:
SCHEMA.SOURCE!/ISAMFILEPATH – RDBMS based systems
or
FULL_DIRECTORY_PATH/ on C-ISAM systems.

To change the storage location on Oracle systems change the SCHEMA name, on SQL server systems change the SOURCE name.

The ISAMFILEPATH is the location to store the archived ISAM files if any still exist on your system (the only files that may still exist are the manufacturing union files – these can be incorporated into the database by enabling project).

DA0459   Consolidation Man. Union Files

Preparation

Archiving for the first time can be a time consuming business and can make your system unavailable so pick a weekend.

BACKUP! BACKUP! BACKUP!

Each module has its quirks – the GL asks how many periods you want to keep on line the others ask for a cut off date.

A fast way of backing up the files concerned is to use the unload utility. You lucky UNIX users can launch several unloads at once. The NT brigade however will need to open several command windows to achieve the same result.

If you are unsure about unload use your normal backup routine.

Performance

The archiving routines were written back in the days when ISAM ruled and use a simple algorithm:
• Create two new files – records to keep & records to archive
• Scan the master file writing keep records to the keep file and records to archive to the archive file.

If successful delete production file, rename keep file to production.

When these routines run through the database interface the overheads on the system are high and consequently archiving performance can be very bad – 48 hour weekends spring to mind.

ARCHIVING

To address the performance problem the CSDB_PERFORM environment variable was introduced – if this variable is set additional, performance enhancing, SQL statements are sent to the database resulting in much improved performance.

HINT

CSDB_PERFORM works in other areas of the product too.

Set the CSDB_PERFORM variable in your cs3.env file in the Sage home directory for NT sites or in your. profile on UNIX sites

cs3.env

CSDB_PERFORM=YES.

.profile

CSDB_PERFORM=YES
export CSDB_PERFORM

CAVEAT EMPTOR

Although CSDB_PERFORM can improve performance in several areas around the system it has been known to cause problems too.

The SQL 'WHERE' clauses built the code 'switched on' by CSDB_PERFORM can cause SQL syntax errors – usually when the dynamically constructed statement contains a 'as in O'Grady' or 'as in 2' pipe also watch out for anything using the character '}'!

Reporting on Archives

You can use the report writer to report on any of the archive files, to make the archive available to the report writer use the option

Reporting ➡ Utilities ➡ Copy Dictionary Table

Copy the base tables required for example for Sales Order detail:
copy sop_order_detail to sop_det_arch99q1

Use the option:
Reporting ➡ Utilities ➡ System Dictionary Amendment

Call up the record for sop_det_arch99q1 and amend the filename and filepath fields to match your archive location – if your archives are in the production database leave this entry as it is.

The filename is the trickiest part of this operation due to the various prepending and appending the application carried out during the archive procedure.

The archive file names for SOP are:
• From opheadm to your set name with the suffix ao
• From opdetm to your set name with the suffix al

For Works orders:
• From bmwohm to your set name with the suffix ah
• From bmwodm to your set name with the suffix ad
• From bmwocm to your set name with the suffix ac

• From wswopm to your set name with the suffix ap

For GL:
• From nltranm to your set name with the suffix _at

For AP/AR:
• From slitemm to SL your set name with the suffix _a
• From plitemm to PL your set name with the suffix _a

Conclusion

I have only skimmed the possibilities of what can be achieved. We have archives going back 7 years and using a combination of online, nearline and tape we can usually access any data within 30 minutes whilst keeping online data volumes to a reasonable size.

Happy archiving

Gordon.brown@aesseal.co.uk

ISTUG Meeting, 17 September 2003

At this event, we were happy to welcome three Australian guests from Inecom Pty Ltd (Aus). We were very pleased to see them and hope that they found the event interesting and informative. This highlights the coverage of the ISTUG membership: with members in Australia, Canada, South Africa and Europe – we truly are a global group.

Paul Simpson from Bottomline

The meeting was opened by Gordon Hancock, Chair of ISTUG, who unfortunately felt it necessary to focus on the "apathy" of members, which is something we do seem to be suffering from. We have had very few replies to the ISTUG Satisfaction Survey or the Reseller of the Year Survey – this is not what we expect from people who pay to be part of a group. As members you have the right to be involved with the running of ISTUG, you can influence what we do and tell us what we need to improve on. Please get involved; we need you to make the group work – it is a USER group after all.

Profit from Mobile Productivity

Tom Jones, Operations Director, Mobile Productivity Ltd demonstrated how a mobile data system can securely interface with Sage allowing remote workers to view Sage data and complete transactions, such as sales orders, while away from the office. This was a very interesting presentation and Tom was also available over the lunch period for further questions.

Changes to the BACS System

For those of you who may not be aware of the changes to BACS, Paul Simpson, Alliance Manager, Bottomline presented the BACSIP and showed how cross border transactions may improve. This is a topic that will probably affect all users of the Sage system and needs to be understood. Paul's presentation helped towards understanding the changes that are imminent.

SIGs

We were very lucky to have representatives from Sage at each SIG breakout session and it is hoped that this will continue. There were certainly some very technical questions at the two sessions that I attended. Answers will be posted on the website in the appropriate SIG section.

SES Reseller Accreditation Programme.

Janet Glen explained the examination and training structure that resellers are now subject to if they want to continue selling and supporting the Sage products. There are three levels of accreditation: Sage Line 200 Reseller, Sage Line 500 Reseller and Sage Solution Centre. Janet also clarified the difference between certification and accreditation – individuals are certified and resellers are accredited. There are stringent ratios of certified staff to customers that resellers must adhere to, which will be continually monitored by Sage after the initial accreditation process has been completed.

Linux Case Study

In July 2003 Platinum Blue replaced their ERP with Sage Line 500 on Linux on IBM iSeries. Jon Milward, Managing Director, explained why they took this decision and what impact in terms of business benefits this is already having. Jon also explained how the new solution is integral to their future plans for growth. This was followed by a live demo from Ara Martirossian, Technical Director.

Hints & Tips – Month End Processing

As hoped, this was a very interactive session with many questions and discussions resulting from the presentation given by Sheila Brisland. Sheila also pointed out that there are basic month end procedures available on the End User website. If you do not have yet access to this, please contact your reseller for a password and id.

SES Roadmap

Bill Hill presented on the Product Roadmap and ran through the changes to the Web Client, reporting facilities and the benefits of MSA (Multi-Sever Architecture). The changes to the Manufacturing module were explained by Steve Tattum – these included Advanced MRP and Vendor Management.

All these presentations are now available to view or download in the Members Area of the web site, on the News page.

Did You Know?

Report Writer

Within Report Writer / Display on Every Row screen: if the numbers that you are producing are larger than 12 digits (including decimal place) but you would like to apply some form of formatting to it, if you type EXTEND in the 'Format' column and then press F9 (or CR in non-character interface) a window will pop open in which you can type the format you require (up to 30 characters) e.g. ----------------&&.&&.

Budget Uploads

When uploading a budget spreadsheet, instead of using BUDGET01, BUDGET02 etc. for the column headings, you can use BUDGET01-12 as the period column header – this will spread the budget evenly across 12 months and put the rounding in M12. You can also combine phasings, for example BUDGET01   BUDGET02 then BUDGET03-12 and this will work in a similar way. The total for the grouped months goes in the column e.g. 10000 for 1000 per month 03-12.

Financial Calendars

If you need a period end to end on a Friday, simply amend the Financial Calendar to the date required for the period end. For example, if the last Friday of the month is the 29th, change the calendar to end the period on this date and any transactions on Saturday 30th and Sunday 31st will be in the following period.

Adjustment Period

The Adjustment Period is Period 19 for reporting and A for Enquiries.

Thanks

I would like to thank everyone who has contributed to this edition of the newsletter. We know what you DON'T want to see, however it is not always easy to know what you DO want to read about. Please let us know your views on this – any articles for the next edition can be sent to Nicole James at njames@istug.com. If you have any gems of knowledge that you would like to share, please send them to me and they will be included in the "Did You Know?" section. This is YOUR newsletter and should be thought of as a medium for sharing opinions and knowledge with other users. I would also like to take this opportunity to remind you to send in your completed Reseller and Satisfaction Surveys, if you have not already done so.

Once again, thank you to the contributors to this edition.

Nicole James
Technical Director
ISTUG

ISTUG Committee

If you would like to be more involved with ISTUG then why not join the Committee? Our next meeting is 15 October 2003 at 13:00 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

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Details all serving committee members can be found on the ISTUG web site, www.istug.com

ISTUG HELP LINE - Phone 01237 471269 or email istug@aol.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.