Changes in Backup Technology

By John Douglass

With the number of threats out today, the risks to a company's data have increased substantially. This in turn increases the need for data protection and, more importantly, data recoverability. Many businesses are not as safe as they believe. A backup of critical or crucial data should generally be the first thing that comes to mind when considering a disaster recovery plan. The frequency of backup is another important consideration, as any information added or changed between the last backup and the data loss event will be lost. Most companies backup nightly; others backup only once per week. Still others run programs in the background that will backup data any time a file is changed.

Tape media was once the standard medium for backing up computer data as it was much more economical than disk storage. But with tape media a user was unable to instantly jump to a specific file on the media. Instead you had to spool forward or backward to reach the information that needed to be restored. For these reasons, disk-based media has now become the media of choice. Disks are more stable than tapes, less prone to physical damage, and are not subject to damage from stray electromagnetic radiation. While tapes were once the economical choice, the price of disk storage has dropped dramatically over the past decade placing it more in the same price point.

In addition to the frequency of back up events and the type of back up media, the type of information to be backed up is also an extremely important consideration. Recovering a data file will be of little benefit if the application for the file has been lost as well. Data files may be accidentally deleted by user error or by an antivirus program or can be corrupted, but fires, flooding or power surges don't discriminate between data and applications. In the event of an actual disaster, the losses could be much more extensive. The entire system, including applications and server configurations could be gone as well. A true "disaster recovery" system will ensure that systems and applications, as well as critical company data, is safely duplicated and readily available for reinstallation or restoration.

Backed up information is always thought to be safer when stored at an off-site location. Storage at multiple off-site locations is considered to be even better. Off-site storage is a challenge for today's backups. It is now critical to back up the entire system as opposed to just data files, but backing up files is only half of the equation. Recovery is equally important. Businesses today need to have continuity. When operations are disrupted by a server failure, companies need to recover quickly and return to normal operations ASAP.

QUICK BYTES

Sage Summit 2014

We're looking forward to attending Sage Summit 2014 the end of July. We always learn new things.

PSI Holiday Office Closings

Friday, July 4th

Backup Technology

>> *Continued from page one*

Recovering data, applications and system files over an internet connection sounds easy enough, but it can be a slow process. Considerations include the download bandwidth limitations of your internet connection, the size of your system, and how long it would take to restore everything currently stored on your server. Also, in the case of a disaster, the internet connectivity may be damaged or down. If there is no internet connectivity, off-site information will be unavailable no matter how well it is backed up. On-site storage would be better in such situations, but file-by-file recovery, even with on-site availability, is still a time-consuming process.

Fortunately, a file-based disaster recovery solution isn't the only option. Professional Software has opted instead for a block-based method of information backup and recovery. While file-based recovery is only possible as long as applications or systems are available to process the recovery, block-based methods typically make an image and store the contents of an entire disk. Rather than recovering individual files one at a time, recovery is accomplished by writing a disk image onto a new drive which duplicates all of the original information on the drive(s), data, applications and operating system. The speed of block based disaster recovery methods makes them superior choices for business continuity.

When looking for the optimal solution for the needs of our your business, Professional Software has considered all of these issues. The stability of the backup storage media is important, backup frequency limitations are important, as is the speed of recovery and the storage infrastructure. If you would like to see how we can improve the backup/restore process for your business, please contact us for a consultation.

Getting New Workstations?

It seems that with each version of Sage 100 ERP the workstation requirements change, as well as the workstation setup process required to connect to the software on the server. If you are researching new hardware, server or workstations, we always recommend that you take a look at the Sage 100 ERP Supported Platform Matrix for the specific version of Sage 100 you are running. A link to these matrixes is available on our website at the bottom of the Products page.

If you know you will be getting a new workstation or workstations and will be needing our assistance with the workstation setups, we ask that you schedule an appointment with one of us to ensure that someone will be available when you need it done.

Sage ERP Document Management powered by Altec

Do you realize the cost to your company to store your paper documents? The average U.S office worker uses 10,000 pieces of paper each year and on average 20 percent of office space is set aside for the storage of all of these paper documents. The Sage 100 ERP Paperless Office feature does a terrific job of minimizing the amount of paper used, but the searching and reviewing source documents can require more resources than the Paperless Office feature allows. Altec's document management system, doc-link, is an integrated solution that allows companies to capture and archive documents electronically.

If your company needs:

• Non-Sage 100 users to access paperless source documents

• Indexing of source documents so you can see all documents associated with a particular order, vendor, customer, etc.

• Approval workflow of paperless documents with electronic stamps and annotations

Then doc-link is a solution that will allow you to take paperless processing to the next level. Call our office for more information.

Is It Time to Upgrade to Sage 100 ERP 2014?

The latest release of Sage 100 ERP, version 2014 became available earlier this year. You may be wondering if your company should upgrade to this latest release and why. One consideration is the version you are currently using.

Sage will no longer provide phone or email support for version 4.4 as of 9/30/14 and stopped Product Updates, Quarterly and Yearend Updates and Tax Table Updates for the 4.4 version as of 12/31/13. This is a major concern particularly if you are using the Payroll module.

It is also important to keep in mind technology compatibility issues with older versions of Sage 100 and new hardware and operating systems. Windows XP is no longer supported, so that along with the release of Windows 8 and the fact that most new computers are a 64-bit technology, makes staying on a supported version of Sage 100 important.

All Sage 100 ERP version upgrades are included as part of your Sage Business Care Plan (installation is not included in the Business Care Plan). There are so many great enhancements in versions 4.5, 2013 and 2014 and if you fall behind on the upgrades, you're missing out on benefits you've already paid for.

There are many productivity enhancements in 2014 and here are just a few of them:

• The autocomplete feature in the customer, vendor and item code fields gives everyone an easy way to look up customers, vendors and items.

• Sage Data Cloud and the new Sage Mobile Sales and Sage Mobile Service apps will help expand your business and provide your salespeople and field technicians with tools and information in the field.

• Sage Billing and Payment gives your customers the convenience of paying bills online with a 24/7 self-service web portal.

• Reduce excess inventory with the cloud-based Sage Inventory Advisor which continuously monitors and analyzes your data to improve stock forecasting and cut down on stock outs.

• The new profitability dashboard in Sage Intelligence Reporting gives you an at-a-glance look at the profitability of customers, products and salespeople.

• Now you'll be able to keep the print window open after previewing or printing of Custom and financial reports. This was one of the most popular requests submitted by Sage 100 customers on the idea portal.

• The Search Grid window has been updated to make searching easier. Now the Column Name field defaults to the first column name in the grid instead of row number when performing a "find".

• Find invoices easier with the Invoice list button in Accounts Payable Invoice Data Entry, Repetitive Invoice Entry and Accounts Receivable Invoice Data Entry.

You've made a significant investment in your Sage 100 ERP system, so why not take advantage of the added features and functionality?

Sage Payment Solutions Marketing Calls

We have recently heard from several clients about marketing calls they've received from someone identifying themselves as connected with Sage Payment Solutions. After hearing how the conversation went, I was convinced that this was not an actual Sage representative. I contacted our Sage rep for Sage Payment Solutions, Greg Axelrod, and he assured me that these callers were not part of the Sage family. One caller actually gave his full name, email address and phone number. All Sage employees have email addresses that end in @sage.com and this third party caller's email was not that.

With the latest version of Sage 100 ERP, PC Charge can no longer be used. This means that all users of the Credit Card Processing module are required to use Sage Payment Solutions as their processor and must have a Merchant ID from Sage Payment Solutions. This change has brought out a number of third party marketing people contacting Sage users to demo an alternative solution. Please be aware that the PCI compliance regulations in the credit card industry have very strict policies concerning how credit card numbers can be stored and accessed. In order to comply with these regulations, Sage introduced the Sage Exchange Vault to store credit card numbers. Credit card numbers are no longer stored within the Sage 100 ERP software. Since Sage has no control over nor can they guarantee if third party processors are PCI compliant, they require the use of their Sage Exchange Vault with Sage Payment Solutions for all Credit Card Processing users.

If you receive a call from someone claiming to be with Sage Payment Solutions, please take their name and number and give our office a call. We can verify with our Sage rep if these individuals are legit. We have a very knowledgeable and helpful Sage Payment Solutions rep in Greg Axelrod and he can answer any questions you may have, including a rate review of your current credit card rates. Even if you are not using the Credit Card Processing module, you can still use the Sage Virtual Terminal to process credit card transactions online through Sage Payment Solutions. If you have questions, want a rate review or have received these marketing calls, give Ann a call.

Sage 100 ERP Tips

How to Set an Inventory Item as Inactive or Discontinued

One of the features available in Sage 100 Inventory is the ability to designate an item as Inactive or Discontinued. You can mark an item as **Inactive** or change the Product type of an item to **Discontinued** by going to Item Maintenance on the main menu in Inventory Management.

- To mark an item as **Inactive**, go to the Additional Tab, check Inactive Item in the lower right quadrant. In Sage 100 version 4.5 this checkbox is on the Main tab on the right.
- To mark an item as **Discontinued**, go to the Main Tab and at the Product Type, using the drop down menu, select Discontinued.

Inactive items cannot be purchased or invoiced, nor can they be used on a Sales Order.

Select Discontinued for an item that is no longer available. If a discontinued item is entered in a data entry task, a message appears stating that the item is discontinued and asking whether or not to continue. If you click Continue, the item will be accepted.

Modifying Sage 100 eFiling and Reporting Data

Included in the 2013 Sage 100 ERP Yearend IRD is a utility that allows users to correct certain check level items contained in the PR_40 eFiling and Reporting file. This is the file that contains the information used for Aatrix W2 printing, the 941 Form and Yearend Filings within the Federal and State eFiling and Reporting module. Data that can be edited includes: hours worked, gross earnings, FICA/Medicare wages and withholdings. There's not a lookup for check dates, so you must know the exact check date in order to edit the correct record.

If you need instructions on this utility, give our office a call and we can email them to you.

Crystal Reports - Tips & Tricks

Date Functions

By Tom McElroy

Crystal Reports has many functions for working with dates. One handy function is the Date Difference function.

For example, you may wish to know how many days between two dates. This is the formula you would use for this:

DateDiff ("d", {AP_InvoiceHistoryHeader.InvoiceDate}, {AP_InvoiceHistoryHeader.InvoiceDueDate})

The "d" indicates that you want the number of days between the two dates. There are many other parameters that you may use to determine different types of intervals:

Examples:

- "w" results in the number of weeks between
- 'm" results in the number of months between
- "s" results in the number of seconds between

To find a complete list, visit Crystal help and search for "datediff".