The Next Wave

Management Letter

Information is power. This issue of *The Next Wave* covers ways to get better information from your data. As you will see, even the underlying data repository of Microsoft SQL server has tools to provide you with meaningful information. As you move up to the application layer with your CRM, ERP, and BPM (Business Process Management) systems, it only gets better.

I know it is only September but we are getting excited about 2007. You see, 2007 is Beachwood Systems' 20th anniversary as a company. We find that most of our clients have achieved that milestone and we are proud to be part of the club.

Each day we feel blessed to have the set of clients that we do. We find that the companies we continue to serve over the years share the same values that we have… doing what is best for the customer, and doing things right even if they are hard. Thank you for your trust and confidence to allow us to assist with your IT needs. We think of you as a friend.

Adam Ryan

Microsoft SQL Server 2005

Microsoft SQL Server has become one of the most popular database engines in the world. Microsoft released the new version of the database engine late last year and it is gaining even more popularity.

The ability to transform corporate data into meaningful and actionable information is the single most important source of competitive advantage in today's business world. The new version of SQL Server improves security, scalability, and availability of your data. As you can see from the graphic above, SQL Server 2005 includes a lot more than a relational database and management tools.

Integration Services replaces Data Transformation Services (DTS), which was first introduced as a component of SQL Server 7.0. Integration Services goes beyond DTS in its ability to clean, aggregate, merge and copy data. It also includes graphical tools and wizards for building and debugging packages: tasks for performing functions such as FTP operations, SQL statement execution, and e-mail messaging.

Analysis Services permits the combination of data from multiple SQL and non-SQL data sources into views. It provides a unified and integrated view of all your business data as the foundation for all of your traditional reporting, online analytical processing (OLAP) analysis, Key Performance Indicator (KPI) scorecards, and data mining.

Reporting Services has been changed markedly from early versions for SQL2000. Microsoft SQL Server 2005 Reporting Services is a server-based solution for building enterprise reports that draw content from a variety of relational and multidimensional data sources, publishing reports that can be viewed in various formats, and centrally managing security and subscriptions. The reports that you create can be viewed over a Web-based connection or as part of a Microsoft Windows application or SharePoint portal.

Notification Services is a platform for developing and deploying applications that generate and send notifications to subscribers. The notifications generated are personalized, timely messages that can be sent to a wide range of devices, and that reflect the preferences of the subscriber. A notification can be generated and sent to the subscriber as soon as a triggering event occurs or can be gener-

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ated and sent on a predetermined schedule specified by the subscriber.

Replication is a set of technologies for copying and distributing data and database objects from one database to another, and then synchronizing between databases to maintain consistency.

Microsoft SQL Server 2005 contains the functionality you need to issue full-text queries against plain character-based data in SQL Server tables. Full-text queries can include words and phrases, or multiple forms of a word or phrase.

Should you upgrade from SQL 2000? That is a question to ask the developer of each major application using SQL as its database engine in your company regarding performance and functionality gains. Even if the developer says that it is optional, the web based Reporting Services alone may be worth it if you have people outside your local area network that wish to view corporate data easily.

Getting e-mail on your Smart Phone or Wireless PDA

Can't be without your email when you're on the road? Here are some options for getting email and other data on a wireless PDA or Smart Phone.

One of the slickest solutions is available to you if your company uses Microsoft Exchange 2003. There is a built in service called OMA which stands for Outlook Mobile Access. The user of the phone simply needs to go to your website and add '/oma' to the end of the main URL, log in, and then can see their in-box, saved messages, contacts, calendar, and tasks. The output is designed to fit on the small display of a handheld device. This solution works very well.

Many of the devices on the market come with an email client program built in. If you have your email server set up to act as an IMAP4 server then you can obtain mail in this manner.

Often times wireless vendors have software that you can load on your desktop or on the email server. If loaded on your desktop then it redirects the data it finds in your local Outlook to its own server and then your phone can obtain it from there. This approach requires that you leave your desktop pc turned on and Outlook open.

If the wireless vendor provides an email server connector program then the mail can be pushed out at the server level. Typically this approach is more expensive and you need to have about 10 users to make it cost-effective. Some solutions are implemented behind the firewall with an encrypted connection to the wireless network. Others have a pull feature where the vendor obtains the needed data from the outside.

One other solution is from GoodLink. This approach is similar to the desktop approach above except you maintain your own server in house rather than using the wireless vendor's system.

GoldMine Assessment Study

For a modest fee, Beachwood Systems offers assessments of your GoldMine implementation to see how you can get more out of your system investment. The assessment starts with the circulation of a survey to each key user of the system to determine job duties, GoldMine system functionality being used, strengths and problems of the system as perceived by that user, and a host of other information. This data is then analyzed by an experienced GoldMine consultant and supplemental phone interviews conducted as needed. A set of recommendations is prepared for how your company can better utilize GoldMine in your business environment. We then meet with management to present the problems, opportunities, and recommendations and discuss priorities of implementation. The cost of the study is $1,100 for a small site with less than 10 users, $1,600 for a site with between 10 and 25 users, and $2,400 for a site with more than 25 users.

Whether your GoldMine issues have arisen from a poor implementation, a lack of defined procedures that have resulted in inconsistent system usage, or employee turnover, it may be time to consider having a review conducted. After all, how much does it cost your firm in lost sales, customer dissatisfaction, and employee turnover using a full featured system in a sub-optimal manner?

Using Excel to retrieve Macola data

The E-Excel Add-in provides a dynamic link between Macola ES and Microsoft Excel. This functionality is not restricted to the financial accounting packages, but is available across the entire Macola ES suite. This link allows you to generate your own overviews in Microsoft Excel using Macola ES data. You can make your own calculations using the data in the Macola ES database without having to type or export it. After adding transactions in Macola ES you just refresh your worksheet, giving you immediate, up-to-date, dynamic reporting capabilities.

E-Excel Add-in lets you build your own reports using a wizard or standard formulas. These formulas let you determine which information you want to retrieve, such as a customer's outstanding items. In doing so you can add your own variables, such as customer number or date.

Many Macola Progresssion users use F9 to produce financial statements from the General Ledger data. But did you know you can get data directly from the SQL tables with Excel right out of the box?

Use the Data menu option and select the option to Import External Data. Then click New Database Query. After supplying the proper user name and password (which can be restricted to select databases and tables), you will see a list of Macola companies in SQL. Select the company you want. Then use the wizard to pick the table and fields you want, how you want to filter the data, how you want it sorted and how you want to output it. You have the choice of bringing the data back in standard Excel format or as an OLAP pivot table.

Microsoft CRM - Service Management

Microsoft CRM has three major modules including Sales, Marketing and Service Management. The service management module is meant to help your company resolve its service requests faster and more efficiently in order to improve long-term customer loyalty.

The Service Management module is used by support representatives to track and manage issues from the initial point of contact through resolution. When a new service request comes in, the contract for the customer can be reviewed, and a case is set up for it. From that point on, a request or inquiry will be automatically associated with the appropriate case. Cases can be sent to queues where they can be accessed by support personnel or they can be automatically routed to teams or individuals based on rules in workflow fashion. If the case is not resolved in predetermined time frames, escalations rules can be used to notify managers.

The Service Management module features a searchable knowledge base that has a built-in review mechanism to keep the information as accurate as possible.

Microsoft CRM is tightly integrated with Outlook and automatically synchronizes Outlook E-mail, Calendar, Tasks, and Contacts with the Microsoft CRM database. With this integration, all email correspondence on the case is tracked and auto-response emails can be programmed.

Service appointments can be scheduled. There are many reports to evaluate common issues and measure service performance of your organization.

Business Process Management

Business Process Management (BPM) is a term that many organizations are using to solve the challenges facing a company's procedural needs in tying isolated operations together. All businesses embrace processes, and whether these processes are documented in Word docs or in employees' heads, they are what keep businesses moving forward on a daily basis. BPM promotes the notion that a business moves forward based on the collective information that is stored, shared and circulated amongst employees.

By automating the routine business processes within your organization, you can increase efficiency, reduce errors, increase accountability, and ensure compliance with standards and legal requirements. Exact e-Synergy's business process management (BPM) capabilities enable you to use workflow to quickly distribute tasks to the right people, track the progress of each task, and report on the results. Because business processes often involve stakeholders outside of your organization, e-Synergy's workflow automation isn't limited to your employees - your customers and business partners can also be involved.

This workflow automation is provided as part of your overall business management system, so information is not just kept in a file somewhere; instead, it is always linked to people, projects, items and transactions.