

QUARTER

03

July 2010

QUARTERLY-  
NEWSLETTER  
FOR OUR NAV  
CUSTOMERS

# The Advisor



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## Help Us Reduce Our Paper Use

**Invoices:** Beginning July 1, we are sending out our invoices by email rather than by hardcopy. If you haven't already, email Kristen (Kristen@gilbertassociates.com) with the name of the person(s) at your company that should receive your invoices.

**Newsletter:** We currently send out both a hard copy and electronic copy of our quarterly newsletter. You can now opt-in to just receiving an email copy of the newsletter. Opt-out of hard copy newsletters by visiting <http://www.Swiftpage7.com/survey/Advisor>



## The Paperless Office

The average worker uses 10,000 sheets of paper per year. That's about 1 sheet of paper every 10 minutes. After reading statistics like this, we decided it was time to switch to paperless invoicing. This change will save us time and money and help reduce our paper consumption. It got us thinking, what else can we do around our office to help lessen our environmental impact and keep the Pacific Northwest beautiful for generations to come? A bit of research led us to a few suggestions we found worthy of sharing with you.

Careless use and disposal of office paper and office supplies is rapidly clogging landfills, contributing to greenhouse gas emissions, depleting natural resources, contributing to air and water pollution, and wasting energy. The amount of copy paper alone used in the United States in one year consumes 15.8 million tons of wood, enough to build 1 million US homes. Here are a few suggestions to reduce your paper use:

- **Use two-sided printing** whenever you can, consider making it your default setting.
- **Make recycling convenient**— give each employee a recycle basket or box.
- **Switch to recycled paper.** Your best environmental choice is a paper with a high percentage of post-consumer content, 30 percent or greater.
- **Send your invoices via email** rather than snail mail. When you print your accounting documents, software like PDFBlaster will automatically create a PDF file, preaddress them to the recipient data stored in Sage Pro, and then deliver the document via email. This could turn your tedious \$3/document process into an automated, two-click, pennies-per-dollar job.
- **Implement a document management system.** Store copies of documents on your server rather than hard copies in files. Paper takes up physical space, and most businesses have more paper than they

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## Paper Facts

A typical business will produce 1.5 lbs of paper waste per employee per day.

If the United States cut office paper use by just 10% it would prevent the emission of 1.6 million tons of greenhouse gases -- the equivalent of taking 280,000 cars off the road.

With all the office paper we waste every year we could build a 12-foot high wall of paper from New York to California.



## Into the Blogosphere We Go

In past editions of The Advisor, we let you know about learning opportunities offered to you by Microsoft and Gilbert & Associates. In the past few months, we have rolled out another exciting resource:

**The Advisor– Blog Edition:** [www.GilbertAssociates.com/blog](http://www.GilbertAssociates.com/blog) Take a look at it and let us know what you think!

Here are a few other resources that you might want to take a look at:

**Microsoft CustomerSource:** <http://www.microsoft.com/dynamics/en/us/customersource.aspx>

Microsoft CustomerSource is a one-stop shop for NAV customers. CustomerSource is a benefit of being current on your Microsoft Dynamics service plan and offers you access to the NAV knowledgebase, tips & tricks and learning documents. Contact Kristen at our office if you need assistance setting up your account.

**Gilbert & Associates Customer Portal:** <https://www.autotask.net/ClientPortal/Login.aspx?ci=4979>

Our Customer Portal offers you access to your service tickets, past invoices, and our knowledgebase. We archive all of our tips and tricks and newsletter articles in this searchable knowledgebase so you can easily find them. Email Kristen ([Kristen@gilbertassociates.com](mailto:Kristen@gilbertassociates.com)) to get your login information.

**Gilbert & Associates' Document Library:** [www.GilbertAssociates.com/Docs](http://www.GilbertAssociates.com/Docs) This is our online document library. You can find brochures, whitepapers, success stories, and past newsletters archived for your convenience. Take a look. Let us know if there is something you would like to see and we will do our best to find it for you.



## NAV Updates

Microsoft recently released a statement about the upcoming update for Dynamics NAV 2009, scheduled for rollout in Q4. The statement briefly describes a number of features that will surely benefit users. Below are the new features and functionality noted in the statement:

- Integration with Microsoft Dynamics CRM
- Online payment services
- Web-based access for Dynamics NAV
- Deployment of Dynamics NAV using Microsoft App-V technology
- Enhanced Windows 7 user interface and functionality
- Treemap Visualization

These are exciting improvements to the overall NAV user experience and should continue to keep existing NAV users satisfied. In fact, a number of our clients have clamored for an advanced CRM solution that tightly integrates with NAV. Within Gilbert & Associates, talk of web-based access, App-V technology, and Windows 7 interface enhancements has also gotten us really excited.

As soon as the update goes public, we will post our review of the changes on our blog at [www.GilbertAssociates.com/blog](http://www.GilbertAssociates.com/blog). Meanwhile, check out our blog for a link to Microsoft's news release on the updates.



## Did You Know?

Gilbert & Associates offers expertise in Sage Pro ERP and other business systems in addition to Sage Pro, we sell and support Sage CRM and Microsoft Dynamics NAV .

Microsoft Dynamics NAV is a complete and customizable business management solution that helps your people work faster and smarter.

Want to know more? Visit [www.GilbertAssociates.com](http://www.GilbertAssociates.com).

*Paperless Office, continued from Page 1*

have space to store it, so documents have to be sent off-site, where they are less accessible and incur storage charges. Disk storage takes dramatically less space than paper and the ever falling costs of media make documents even cheaper to store online. A document management system can integrate with your ERP system so users can look up supporting paperwork for a financial transaction recorded in their ERP system without leaving their desk.

These are just a few suggestions and offer you a few to think about. Why not implement one of the first few in your office today? Consider a document delivery system or document management system, how much money could your business save by reducing your paper consumption? Equisys offers a handy ROI calculator that you can use to calculate how much money and time a document management system like Zetadocs could save you in a year. [http://equisys.com/products/zetadocs\\_for\\_nav/calculator\\_zetadocs\\_NAV.html](http://equisys.com/products/zetadocs_for_nav/calculator_zetadocs_NAV.html) Try it out, you might be surprised by the results.

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## How Well Do You Know Your Business?

### A Brief Look at Data Cubes

A large percentage of the phone calls and requests I receive are from clients asking me how to get a certain report or specific metrics out of their ERP system. Many times, this phone call turns into a request to create a new report. Although the reports that come bundled with most ERP systems provide a broad overview of the status of your business, just about every organization has unique needs that cannot be anticipated by an out-of-the-box solution.

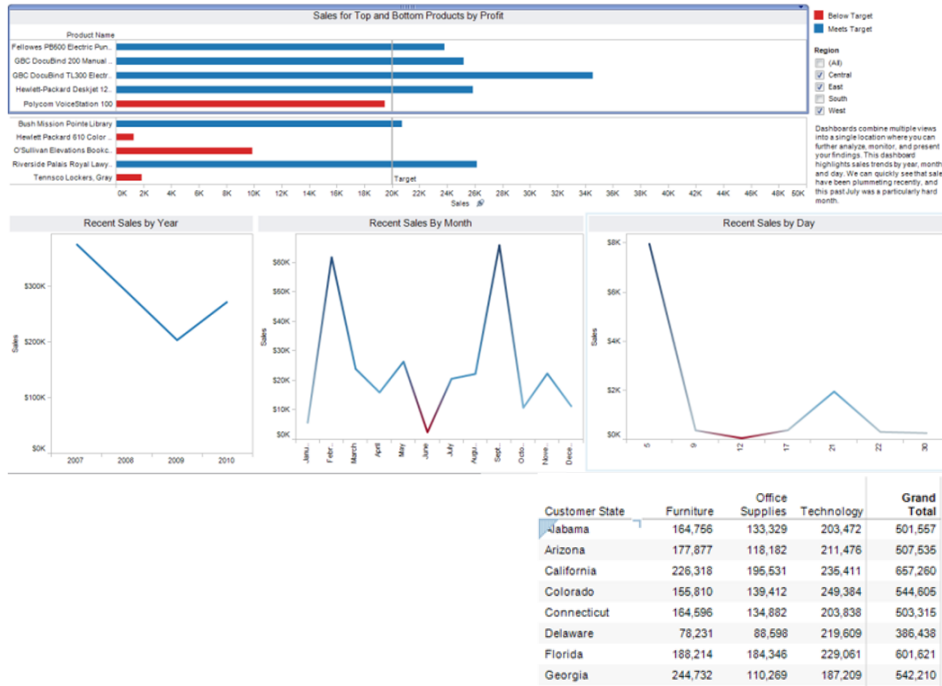
You have probably encountered one or more of the following buzzwords thrown around in recent years: business intelligence, dashboards, reports, pivot tables, data warehouses, data cubes. These tools and the technology behind them have been floating around the business world for some time, but because of the complexity involved, reporting solutions have either been too expensive or too confusing to gain any traction in all but the largest of organizations.

Historically, users of accounting systems have either been limited to the reports that are available from within their ERP application or have had to turn to ad-hoc report builder tools. In many cases, these options are far too limiting; the built-in reports do not provide enough flexibility and the ad-hoc tools are either too difficult to really get the results you are looking for, or they just take a long time to generate the data.

You have invested heavily in the design of your ERP system. Each day it is capturing critical information about your business -- what you are selling, who you are selling it to, where the product is ending up, what your profit is on that sale, what customers used to buy from you but have recently tapered off, etc. All of this information is available to you already, but it can take weeding through pages of printed reports or Jedi-like Excel skills to see a clear picture of the events that are taking place.

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A Brief Look at Data Cubes

Data Cubes are a great answer to these challenges as they allow for near-instantaneous analysis of a database without being an expert in relational databases or SQL queries. Simply put, a data cube stores and presents your data in plain English terms. All you have to do is click on the information you want and a report is built. The interface for building reports is simple and un-daunting and a user can be trained in just a few short hours. You can generate charts, graphs, maps, or spreadsheet-style reports and publish them in minutes.

This technology is powerful for visualizing and tracking trends within your organization. They differ from traditional reporting in the sense that each user can create and run their own reports whenever they want. Report layouts can be shared within the organization, but each user has all of the tools they need to answer any questions they might have about the status of the business.

We will be demoing a data cube for our Microsoft Dynamics NAV customers during our July 13 NAV User Group. Gilbert & Associates offers a variety of ERP software events visit our website [www.GilbertAssociates.com](http://www.GilbertAssociates.com) for a complete list.



Any report. Any way. Right Now.™

What's new in Jet Reports 2009 you ask? Let me tell you!

Report Builder—Create reports in minutes from multiple tables.

Improved Scheduler—Distribute email with SMTP. Show report information in scheduled email subject and body.

Browser—Replaces the Designer. Gives the report designer table and field level access to build reports with detailed control.

Enhanced Link —Create multiple links and nested links to any table in you want.

Data Views—Simplify report creation in Report Builder with a relevant set of fields from multiple tables.

Data View Creator—Easily create, edit, export/import, and combine tables into custom sets of fields from the NAV data dictionaries for use in Report Builder.

.NET Architecture—All new .NET modular architecture gives Jet 2009 easy integration and growth with latest technologies and developments. High Performance—On average 2x performance improvement over previous versions.



Read this edition of The Advisor, then:

- Update your Newsletter Preferences at <http://www.Swiftpage7.com/survey/Advisor>
- Check out our blog at [www.GilbertAssociates.com/blog](http://www.GilbertAssociates.com/blog)

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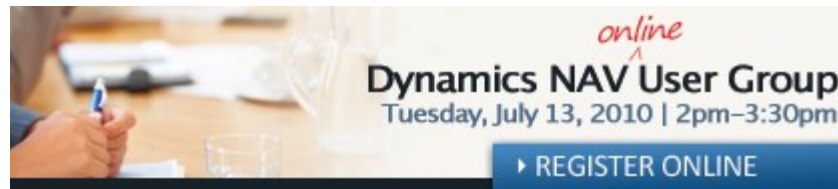


## A New Look

If you haven't taken a look at our website recently, you should check it out! We just finished our redesign and would love to hear your feedback.

[www.GilbertAssociates.com](http://www.GilbertAssociates.com)

If there's something you want to see, let us know and we will work to put it on the site.



Join us and fellow Microsoft Dynamics NAV users from other Gilbert & Associates customers for our first Microsoft Dynamics NAV Online User Group. We are excited to offer you an opportunity to join from the comfort of your own office. Join us and learn more about your company's information system. Here's a brief look at topics on the agenda:

**Why the Role Tailored Client?** Take a look at the exciting new user interface introduced in NAV 2009.

**DataCubes::** Watch Michael demonstrate the power of data mining using data warehousing technology with cube viewers. He will even demonstrate some quick business intelligence tricks using Excel and NAV.

**Quick Answer Session::** Submit your questions about NAV at registration and use this time to pick our brains on product knowledge.

Visit [www.GilbertAssociates.com](http://www.GilbertAssociates.com) to register.

