

QUARTER

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QUARTERLY-
NEWSLETTER
FOR OUR NAV
CUSTOMERS

The Advisor



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Did you know?

Some versions of Windows qualify you for the Windows 7 Retail box upgrade. To qualify for the Windows 7 Retail Box upgrade, your computer must have a full license to Windows XP (any edition) or Windows Vista (any edition). If you only have a license for any version prior to Windows XP, then you do not qualify for the Windows 7 Retail Box upgrade and would be required to purchase a Full Windows 7 license to run Windows 7 on your computer legally.

Read more on the Blog for the Microsoft SMB Channel Community at www.mssmallbiz.com



Windows 7 & NAV: Is it Right for You?

Windows 7 has been all over the news this fall, but then again, so was Windows Vista. Naturally, businesses of all sizes have been thinking about upgrading to the latest Windows operating system. The switch to may be natural for your home PC, but what about at the office? We asked Jimmy, our resident Microsoft Dynamics NAV & Windows 7 guru what he thought about the switch and what it would mean to you as a NAV User.

Jimmy's Two-Cents:

Currently the only version of NAV that Microsoft has certified for use in Windows 7 is NAV 2009. For those of you that are still running previous versions of NAV, it is still possible to work in the new operating system, via XP Mode which is really a full install of XP Pro in a virtual environment. XP Mode is integrated with the Windows 7 environment and therefore users should still have all the network connections and peripherals accessible to any applications installed in the XP Mode environment. You can read more about this below.

Here's a peek at the pros and cons to the upgrade,

looking specifically at the advantages and drawbacks small to medium sized businesses like yours might encounter in the switch to Windows 7.

Yes, You Should Upgrade to Windows 7

You can still use XP apps. If you need Windows 7 speeds but have applications that only run on eight-year-old Windows XP, XP Mode (available through a free downloadable add-on) can save you.

Better search. Search is the killer app on the Web, and Windows 7 might finally have made it so in the OS. Vista integrated a search box throughout the interface, in Windows 7, it's the results that count. You can narrow the returns on the fly when you get too many. The search bar retains a history of what you've looked for, so you can quickly find things again. There's a better preview available for search results, as well.

Your driver is here. Older systems had a hard time with Vista upgrades due to lack of driver support for the hardware. Heck, so did some newer systems. That's unlikely to be the case with Windows 7. It has more in common with Vista than not, and

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Learn NAV at Your Pace with E-Learning

If you are a Microsoft Dynamics customer enrolled in the Business Ready Enhancement Plan you have unlimited access to E-Learning for Microsoft Dynamics at no additional charge.

Visit <https://www.microsoftlearning.com/dynamics/> for more information.

How is Your Backup Strategy?

93% of companies that lost their data center for 10 days or more due to a disaster filed for bankruptcy within one year of the disaster. 50% of businesses that found themselves without data management for this same time period filed for bankruptcy immediately (National Archives & Records Administration in Washington).

How is your backup strategy? Check out our online version at www.GilbertAssociates.com/news.html to read **Why Online Backups Make Sense**.



Know A Company That Has Outgrown Their ERP?

If you are a current Gilbert & Associates client and you know of a company that could benefit from an ERP system, how about passing along our information? Microsoft has a few great promotions in market for new customers looking to switch to the powerful functionality of NAV. Check out our Provide a Referral Get a Reward program on Page 4 for more information on the benefits you will receive when you provide a referral and help another business reap the benefits of an ERP system fit to their needs.

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.



Windows 7, continued from Page 1

Vista's had lots of time to get all the hardware support it needs. Better yet, Windows 7 is designed to go directly to the driver download pages of major vendors if a compatible driver isn't found.

DirectAccess may be the best access. DirectAccess is just that: direct access to your business network from anywhere, via secured tunneling using IPsec and IPv6—without the use of a trusted virtual private network (VPN). The catch: Your network has to run Windows Server 2008 R2, so this solution won't work for offices without dedicated IT staff.

Better enterprise features. There's a lot of good stuff in Windows 7 Enterprise (which is essentially Windows 7 Ultimate bundled on corporate OEM systems) besides DirectAccess, specifically for security and management. That includes encryption software and application blockers to let IT Pros specify exactly what programs are run on Windows 7 systems, so users can't bring in games from home.

Don't Do It, Keep Your Business with XP

No learning curve. There's a hidden cost when you upgrade users to an OS with as many significant interface changes as Windows 7: training. Windows 7 is a looker and features big improvements, especially over XP. But, after almost a decade, users know XP backwards and forwards and getting them up to speed on Windows 7 might take time your company can't afford.

XP updates until 2014. You might feel you have to upgrade to Windows 7 because eventually Microsoft will stop patching XP for security and other issues. And it will. But do you consider five years from now soon? If you're happy with XP (and can live without the tech support from Microsoft, which ended earlier this year), why change?

No direct XP upgrades. Think you can just pop a Windows 7 disc into a system and upgrade the OS but leave your software and data intact? Think again. Microsoft is only allowing "in-place" upgrades from Vista—XP users have to format their drives and do a clean install.

Adapted from a PCMagazine by Eric Griffith. See the full article at

New hardware needed. You've been running XP for years just fine on computers that were the top of the line in 2001. The chances of them supporting Windows 7 are slim. We're not talking just upgrading a couple of components—it's going to be time to get all-new systems, which can be costly, even if computers are cheaper today. Remember, at the very least, you need 1GB of RAM and 16GB of disk space just to install the 32-bit version of Windows 7. You need even more RAM and disk space to go 64-bit or to run XP Mode.

So how does Dynamics NAV 2009 work and feel in a Windows 7 environment? Well, it works and feels just like Dynamics NAV 2009! There is no ground-breaking difference or improvement in performance.

Users on older versions of NAV could potentially experience slower processing speeds in XP Mode than if you were to run the same NAV version in a true Windows XP environment. And this is primarily due to the need to run NAV in a virtual environment. For those that are unfamiliar with virtualization, think of XP Mode as a program inside Windows 7, and that program uses up processing power and memory of the host computer just to run it. On top of that, install NAV 2009 inside XP Mode, and now you have the idea of a complete ERP program running inside another program inside Windows 7. How your NAV will run depends on how powerful your PC is.

Overall, Windows 7 is still a refreshing change from XP and I would encourage office users to give it a try. Having full Microsoft certification for use with Dynamics NAV 2009 is assuring. I cannot speak for other critical applications that you use daily, and I encourage you or your IT department to research before switching. Coupled with the assurance that your older applications will run in XP Mode, switching to Windows 7 may not be as scary as you think. Just be sure to purchase the correct edition for your office.

If you are still reluctant to dive in, why not assign someone at the office to be the designated Windows 7 lab rat and have that person's PC switch over to Windows 7? See how it works and go from there.

Provide a Referral, Get a Reward

Do you know of a company that is struggling with their business information systems, not getting enough support with their current system, or both?

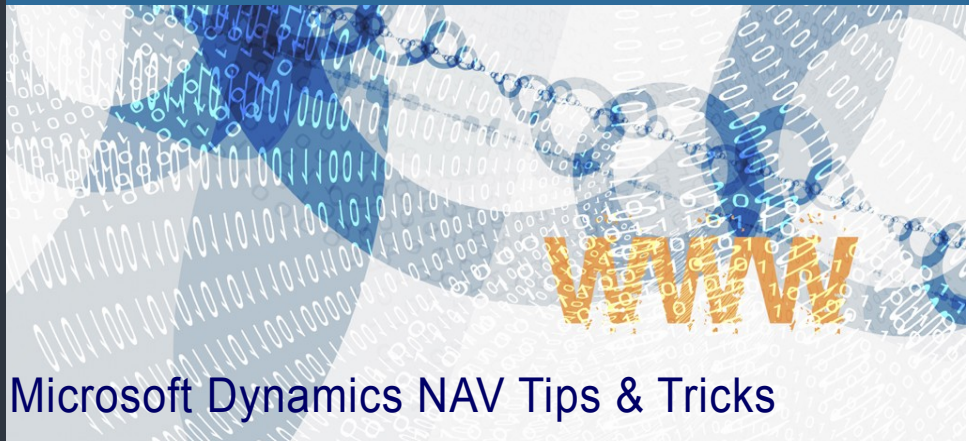
Let your colleagues know that Gilbert & Associates is available to assist them and that we would be honored to have an opportunity to earn their business. Our customers get personal attention, prompt support and solutions that match their needs. We can save the day and you can be a hero! Plus, there's a little something "extra" special in it for you too!

For your first referral that turns into a new customer, we will send you a \$500 Visa Gift Card.

For the second referral that turns into a new customer, we will send you a \$1,000 Visa Gift Card.

For the third (fourth, fifth, and so on) referral that turns into a new customer, we will send you a \$2,000 Visa Gift Card.

Now, wouldn't that be useful for that new workstation you've had your eye on? Contact us for more information or to make an introduction to someone you know with business automation needs.



Microsoft Dynamics NAV Tips & Tricks

Saving Keystrokes is Saving Time

It is easy for NAV users to forget the hot keys for NAV, there are actually quite a few of them. With this in mind, we thought it was time to put together a list of some of our favorite shortcuts to help save you time. *Go to www.GilbertAssociates.com/doc.htm for a complete list of hot keys.*

Dates:

Enter "T" in any date field and it will put in today's (system) date.

Enter "W" in any date field and it will put in your work date. (Note: From your menu, Use Tools/Work Date to change your work date)

Enter the first two letters of the day of the week (MO, TU, WE...) and it will calculate the correct date for you.

Hot Keys:

Ctrl-F6: Cycle through different windows.

F7: Set a field filter. Select any field on a card or list, and it will automatically filter all records on that field.

F8: Copy any field from the line above.

F1: HELP. This is one of our favorites, and it could be your favorite too. There's lots of information here, though admittedly hard to find. Be creative in your searches, it's usually in there.

Looking for Past Tips & Tricks?

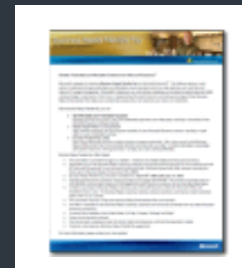
Did you know that we archive all of our past tips and tricks? You can find our past NAV tips & tricks on our website at www.GilbertAssociates.com/doc.html or in the knowledgebase within our Client Access Portal.

Contact Kristen at our office if you need help accessing or need a tour of the Client Access Portal.

Questions to Ask Your CRM Vendor

Looking into a CRM solution? Do your research, find out if it is really the best solution for your needs. We would be happy to show you around Sage CRM and see if it's a good fit for you. Check out our CRM resources on our website at www.gilbertassociates.com/crm.html.

Question to ask	Why you should ask it
What CRM functions does your suite provide?	To figure out whether the software has a full range of functions or is really a CRM point product.
If the suite has gaps, do you have partnerships with other vendors?	This provides clues about weaknesses in the product. Get details on the vendor's alliances.
Is your product Web-based?	Web-based CRM is flexible, accessible and secure.
Has your product dealt with customer data volumes similar to ours?	Great functionality and a slick user interface won't help if you have 50 million customers and the vendor's biggest account has 5 million.
Has your product dealt with transaction volumes similar to ours?	To find out the upper limit of the product.
Does your software work with our relational database (or data warehouse) product?	If it doesn't, you might have to migrate data back and forth into the vendor's database.
How do you migrate data from your product into other software packages, and vice versa?	To understand interfaces with ERP and accounting packages. Do you have to write a custom program, or is there a utility? Is data migration even possible?
Can end users extract data so they can use it locally?	To find out if end users can manipulate data without being connected to the CRM server.
Can you provide a published data model?	Some vendors keep the data model secret, but access to the underlying model will allow you to extract the data for other uses, using software you already have.
Is there a development toolbox with templates?	Development templates speed up implementation by giving programmers packaged software they can customize rather than having to write it from scratch.
What is your product's average implementation time?	Vendors and systems integrators are notorious for low-balling this number, so beware.
Does your company provide implementation help, or do you rely on partners to perform the work?	Some CRM vendors partner with systems integrators or consulting companies, while others have in-house consultants. Understand who will be doing the work.



Business Ready Flexible Pay from Microsoft

Microsoft has extended the Business Ready Flexible Pay until June 23, 2010. This offering reduces your upfront investment through predictable and affordable annual payments which can help optimize your cash flow and improve IT budget management. Preserve your capital resources while making strategic investments in your future. Implementing Microsoft Dynamics NAV and taking advantage of your Business Ready Enhancement Plan helps you increase your productivity and maximize your return on investment.

- **Get affordable predictable payments**
- **Realize Rapid Return on Investment**
- **Increase Productivity Today**

This offer is only applicable to new Business Ready Licensing customers. Contact Kristen at Gilbert Associates for more information today!



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Don't Miss These Articles:

- Windows 7
- Questions to Ask Your CRM Vendor
- New NAV Events Coming Soon!

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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.

Go to www.GilbertAssociates.com

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

Live NAV Events Coming Soon!

We are planning live, in-person NAV events for later this spring. Watch your email for more information and invitations for these two events.

Collaboration, the Real Value Proposition of NAV 2009

- **Webcast for Current NAV Customers, Thursday, February 18, 2010 | 9 am | Registration Link at www.GilbertAssociates.com/events.html**

So often software has been focused on making individual users more productive. The focus has been on the individual and not the organization. In this climate of seeking to do more with less and to truly get a return on our business investments, Microsoft Dynamics® NAV 2009 focuses on doing just that. Now you can truly leverage the power of a team collaborating and working together to succeed in achieving more than ever before. Let us show you how you can truly collaborate with Microsoft Dynamics NAV 2009.

