



Associates Solutions, Inc.
Strength From Experience

ASI Client Connection

Security Audits: Are you due?

Every business, including yours, has valuable IT assets such as computers, networks, and data. Protecting those assets requires that companies big and small conduct IT Security Audits to get a clear picture of the security risks they face and how to best deal with those threats.

A security assessment is one of the best ways to determine the integrity of an organization's information without the associated cost and damages of an actual incident. A security audit and assessment encompasses administrative, technical, and physical security policies and procedures. Ultimately the goal is to discover gaps in your existing defenses so that you can better fortify your infrastructure, comply with regulatory issues and protect your business assets.

So what does an assessment include? An assessment usually begins with questionnaires, interviews, vulnerability scans, and examination of operating systems and network infrastructure settings. An IT Audit will review existing security policies to ensure they meet industry standards and assist in the development of a security program that integrates your business and technology. (Continued on Page 3)



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Upcoming Events!

Please join us for our GP 2010 Launch event. We will be taking a deep dive into the new version and some of the great new features. If you are interested in attending, please contact Joy McRae at 913-384-9677 to register. Space is limited to the first 50 people and a light breakfast will be served.

- **August 19th– 8:30-9:30 - Associates Solutions offices, 13228 W. 99th St, Lenexa, KS 66215**

ASI Updates

Thank you Customers!

Thanks to all who made our sixth annual Customer Appreciation Event a success.

Thanks to all who came out to see us on June 9th. We sincerely appreciate you taking time from your busy schedules to make it out. We can't wait to do it again next year!



Thought for the Quarter:

**“Coming together is a beginning.
Keeping together is progress.
Working together is success.”**

Henry Ford

Cover Story (Cont. from pg.1)

Security assessments also focus on physical assets and understanding the unique security threats associated with each. A partial list of those assets might include:

- Computers, laptops, routers, printers, and networking equipment
- Email
- Cameras, digital or analog, with company-sensitive photographs
- Data - sales, customer information, employee information
- Company smartphones/ PDAs
- VoIP or regular phone call recordings and records
- Web pages, especially those that ask for customer details and those that are backed by web scripts that query a database
- Security cameras
- Employee access cards.

So how can you evaluate a security audit? Your security audit will tell you how effective your security is against what it is meant to be securing. In other words, the audit will enable you to measure the effectiveness of your security policy enforcement. This, in turn, requires that you have a detailed and effective security policy in place; and that your security policy has been fine tuned by a thorough risk management exercise. For example, if your security policy is to include strong passwords that are changed every two months, make sure that the audit report confirms that all of this actually happens and that users have no way of bypassing the policy.



So where do you get a security audit? There's a simple choice: do it yourself, or buy in. The first involves either developing your own security tests or acquiring software that will do the tests for you. The latter involves the use of external security consultants. There is no rule over which is best. If you are a small company, you may well have less at risk and can less afford to employ expensive consultants. Small companies may well be obliged to rely on free and low cost audit software. Larger companies are more likely to have the ability to develop their own software, but little time to do so. Due to complexity, larger companies may well feel obliged to employ external security auditors. In either case in today's world of ever changing threats, thorough security audit could save you lots of headaches in the future.

Product Spotlight

ImageNow Document Imaging Solutions for Microsoft Dynamics

Perceptive Software and Microsoft Dynamics

Enhance Your Investment with ECM

Perceptive Software is proud to partner with Microsoft and ASI in bringing complementary enterprise content management (ECM) products to Microsoft Dynamics ERP and CRM solution users worldwide with our flagship product **ImageNow**.[®] Regardless of your Microsoft Dynamics product (**AX, GP, NAV, SL, & CRM**), **ImageNow**[®] works in concert with your system to provide:

- Document Imaging
- Document Management
- Workflow
- eForms
- Records and Information Management

Use ImageNow to eliminate overhead costs and improve productivity in any business process where documents and business content are pervasive, including these areas:

Accounts Payable & Financials — Capture your payment information and streamline invoice, receiving and other core financial processes to accelerate approvals and maintain profitability.

Human Resources — Electronically capture employee information, create and manage electronic personnel files and respond to employee needs more effectively.

Customer Relationship Management — Improve the response time and quality of your customer service by providing instant, integrated access to the purchase orders, invoices and other documents that support a customer's record.

Supply Chain Management — Streamline and monitor your workflow environment to ensure that documents are reviewed in a timely fashion and to quickly spot items that cause delays in processing.

For more information about our partnership with Microsoft and to view interactive demos of ImageNow, please visit :

<http://www.perceptivesoftware.com/partners/business-application/microsoft-dynamics/imagenow-microsoft.psi>

Or contact:

Ryan Turnbull, *Account Executive – Microsoft Dynamics Focus* at
ryan.turnbull@perceptivesoftware.com

The image displays the ImageNow software interface, which is integrated with Microsoft Dynamics. The interface is divided into several sections:

- Perceptive Software Solutions** (top left)
- MICROSOFT** (top right)
- ImageNow for Microsoft** (middle right)
- Integration with Dynamics** (middle right)
- Financials** (middle right)
- Human Resources** (middle right)
- CRM** (middle right)

The interface shows a document being scanned by a scanner, with a list of captured documents below it. A text box states: "ImageNow can capture any type of document (scan, fax, e-mail, PDF and more) from any source — including Microsoft SharePoint portals."

The interface also shows a screenshot of a Microsoft Dynamics GP invoice, with a green checkmark indicating successful capture. Below the invoice, there is a screenshot of a Microsoft Dynamics GP record, with a green checkmark indicating successful capture. A text box states: "The captured document and e-form also are linked to the related record in Microsoft Dynamics GP for immediate, single-click retrieval whenever they're needed without leaving the Microsoft Dynamics screen."

Dynamics GP 2010 Top Reasons to Upgrade

Microsoft®

What's New at Microsoft?

Meet unique needs from the start

Name your business process, and we can help you manage it. Microsoft Dynamics GP offers proven capabilities that automate and connect the full range of financial management, supply chain management, human resource and payroll management, manufacturing, and project management.

Give people a solution they'll want to use

Designed to work like and with Microsoft® Office Word, Microsoft Office Excel®, and Microsoft Office Outlook®, Microsoft Dynamics GP helps reduce training time and costs. People can focus on their responsibilities, rather than on chasing information and juggling applications, with Role Tailored home pages, graphical dashboards, automated notifications and alerts.

Make it easy to access critical information

Stay connected, speed planning, and fuel performance with role-based dashboards and KPIs that include gauges, charts, and graphs relevant to people's roles. Stay current—but keep it simple—with more than 220 out-of-the-box Office Excel reports that can be instantly refreshed. View and analyze data from a summary pulse down to a specific source record, with drill-back views into Microsoft Dynamics GP from Office Excel, Microsoft SharePoint® Foundation, Microsoft SharePoint Server, and Microsoft SQL Server® Reporting Services.

Extend insight across your entire organization

With security-enhanced, portal-based access from virtually any location, employees can use their preferred applications, including Office Excel, Office Outlook, and mobile devices, to access and work with the Microsoft Dynamics GP information most relevant to their roles.

Connect your people and systems

Bring together employees, customers, and vendors to strengthen all aspects of business performance and relationships. To start, teams can quickly and accurately move tasks from first step through final approval with built-in workflows. Sales, service, and business management staff can collaborate through built-in integration with Microsoft Dynamics CRM. Plus, the latest innovations mean that developers can choose from more than 350 Web services and use a simplified architecture to integrate with a world of applications and data sources.

Tailor your solution to work the way your business does— without complicated IT efforts

No two businesses are alike—and industry specific needs vary widely. With Microsoft Dynamics GP, you can quickly add new capabilities using built-in personalization tools: Create specialized views and new windows, automate tasks specific to your business, and even build light applications. Using Web services and the Microsoft .NET Framework, you can integrate with many data sources and applications, even if they're built on non-Microsoft platforms. You'll also find custom development is easier and more cost-effective with familiar Microsoft technologies and industry standards such as XML.

Microsoft Corp. has announced a new technology aimed at improving the battery installation process called InstaLoad battery installation technology, which allows users to easily install a battery without regard to positive and negative polarity. Never again will people have to squint to see battery installation diagrams, the device simply works regardless if the battery is installed positive-side-up or positive-side-down.

InstaLoad is a patented battery contact design now available for license by third-party device suppliers, with companies like Duracell already lining up to endorse the technology for use in their own products. InstaLoad technology can be incorporated into devices that require frequent battery swap-outs, are used in less-than-ideal environments or use several batteries. Industries that could greatly benefit from this type of timesaving technology based on their environments include law enforcement, military, construction, outdoor sporting and camping. In addition, users of devices with multiple batteries and frequent battery swap-out — including battery chargers, digital cameras, camera flash units and toys — could also benefit.



CRM Tips & Tricks

ASI

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ASI Staff News

Congratulations to the following ASI employees who will celebrate anniversaries with us this summer!

Mike Scott-4 Years

Matt Winship-4 Years

Chris Jarvis-4 Years

Derrick Edmondson-3 Years

Tracking Last Activity Date, Type & Subject

You want to have quick visibility into the last activity date or interaction, type and subject for a lead, account, contact and/or opportunity in Microsoft Dynamics CRM? The modified on date isn't the appropriate indicator of last interaction as it represents the last time the record was updated. The last activity close date regarding this record would represent the last interaction date. Once you are tracking the last activity/interaction date, you can then run notification workflows when a lead or account for instance hasn't had interaction within a certain time period improving your sales analytics.

To obtain this level of tracking , add 2 fields on the form (s) that you want to track last activity for:

1) Date Field called "Last Activity Date"

2) Text Field called "Activity Type & Subject"

Now you will be able to configure a workflow rule for each activity type that you want to track.



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Strength From Experience

Microsoft
GOLD CERTIFIED
Partner

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Upcoming Training

ASI is proud to announce the following Training Class and seminar schedule. If you are interested in attending, please contact Joy McRae or Chris Jarvis at 913-384-9677 to get scheduled.

- **Aug. 9th – Basic CRM Training**
8:30am-12:00pm- Associates Solutions offices
- **Aug. 10th – FRx Training**
8:30am-4:00pm- Associates Solutions offices
- **Aug. 11th – Smartlist /Excel Builder**
8:30am-12:00pm- Associates Solutions offices
- **Aug. 18th – Dynamics GP Payroll & HR**
8:30am-4:00pm- Associates Solutions offices
- **Aug. 25th – Dynamics GP SOP/Inv/AR**
8:30am-4:00pm- Associates Solutions offices
- **Aug. 26th – Dynamics GP POP/Inv/AP**
8:30am-4:00pm- Associates Solutions offices
- **Aug. 27th – Dynamics GP Extender**
8:30am-12:00pm- Associates Solutions offices