



Tips & Tricks #45 – Exploring the Unknowns – Part 2

In this installment, we will now take a look at some specific resources that are readily available in the Passport family of software and services. These may help you define issues and implement a plan.

Support

As indicated in the previous installment, your Passport Partner or the Passport support line can be called upon to help not only with technical software issues but with more general issues such as “how to use”, “how to implement” and “how to extract” what you may feel you are struggling with. For example, you may have some security concerns from watching or reading about the amount of malware out there. What do you do? Call your Passport Partner or Passport’s support line and we will hook you up with someone who can help. Passport Support is available at 800-969-7900 Ext. 124 (support line) or email support@pass-port.com.

If you have an issue that appears to be unresolved, and you would like Passport to investigate to see if an addition to the software would satisfy this, please email psi@pass-port.com and this will ensure that the appropriate people are notified.

In the text below we will be directing you to a number of specific websites for information. All or most of these are available as a “one-stop shopping” page “Customer Quick Links”.

<https://pass-port.com/customer-quick-links>

The specific links mentioned below are represented as buttons and links on this website page. In particular, the first four buttons on the left and the links in the center column are your windows into much of the PSI information you will need to know.

New Releases

Every year, Passport puts out a *new release* of the software. This past year the release was version 12.08. These releases are in addition to the *updates/enhancements and hotfixes* which are distributed throughout the year as needed, to handle fixes and extensions to functionality. A third set of updates is the *annual year-end release* that focuses on the closing of the calendar year with attendant corporate and Federal/State reporting. Most years, these require changes to the PBS/CashPoint software to support new/changed requirements for the various levels of government.

Each of the major PBS *new releases* adds significant new functionality or extends features that currently exist.

For example, the latest release of PBS Version 12.08 is described in detail in:

(https://www.passport-training.com/files/ugd/a66702_61dc554bd78e41ff81795dffdf2bec19.pdf)

And within the release, Passport has added an e-Docs function that allows you to incorporate images of paper documents and PDFs into the Passport SQL database. Since it is a major functional addition, there is specific documentation for this feature: (<https://pass-port.com/document-management-solution/> (document) and <https://www.screencast.com/t/c9GBW4T1H>) (video)

The e-Docs subsystem is an integrated document manager. It not only stores and classifies document images and PDF's, it also allows document images/PDF's to be integrated into the accounting system itself so that a document like the image or the pdf of a vendor invoice can be associated with, and accessed from, the voucher that is created from it. (Details in the above links). This is a major new functional addition to the Passport family of applications.

In version 12.07

(https://www.passport-training.com/files/ugd/a66702_118247666f9247398fa410c45748c8fd.pdf)

the somewhat complex relations between Order Entry, Inventory, and Purchase Order had to be navigated to produce the cross-application functionality to automatically create a Purchase Order from the information entered into an OE order (essentially in real-time).

In prior releases we added the Forms Designer

(<https://www.screencast.com/t/9tZN4EdFkFs>)

and this is being migrated in current releases to cover report printing as well as forms. This technology adds strong tailored-to-you functionality, enabling printed or PDF forms to be customized for your forms needs, and reports as well.

These are simply three examples of the new features available. Do keep your Passport Update Program (PUP) up to date and upgrade to PBS SQL or CashPoint so you receive them. But how do you keep up to date with these releases and how do you decide what is interesting and worth investing the time to implement? As with examples in the last issue, we direct you to the Passport Training site:

<https://www.passport-training.com/>

We have provided the links to all of the features cited as they are accessed from the Training Site page. This gives you a feel for the depth and range of both the documents and videos that accompany the PSI distributions. Access to the Passport Training site is free of charge for all customers current on PUP.

In the particular case of new releases, besides the home/landing page of the site which provides a right-hand side menu for access to information about Passport's latest release ("What's New in PBS"), there is also a full drop down at the top under Version Info. This is a mix of PDF documents and video shorts that provides a detailed rundown of the new features covering the last four releases going back to 12.05 with links to PDF documents and a growing library of video demonstrations.

As a registered Passport Training site user, the drop down next to this gives you access to all of the PBS user manuals.

Please take a few minutes to download and read the What's New section for these prior releases to see if there is something useful to you.

Excel and Report Writers

In the Spreadsheet and Other Crutches section in the last installment, we discussed the use of spread sheets in a negative manner saying that in some cases their existence is indicative of a problem - either in the use of the system or in the facilities the system provides. That being said, there is a balance between the use of these programs as patches for things being done inefficiently or as "band aids" versus the use of these external programs for creating custom features i.e., for tailoring the system, especially with respect to getting data into (Data Import Manager) and out of (SQL, ODBC) PBS.

The Data Import Manager can import spread sheet like data into PBS completely bypassing manual entry. Two very common uses for it are a) creating the Time Worked data within Payroll based on the data available as excel type data out of time-clocks and b) providing a way to quickly and with a minimum of fuss, update costs into the inventory system and therefore acting as a basis for revamping pricing schemes. This last has become a major issue for a number of clients as large vendors for these PBS clients have deluged them with pricing changes and usually these are distributed as spread sheet data.

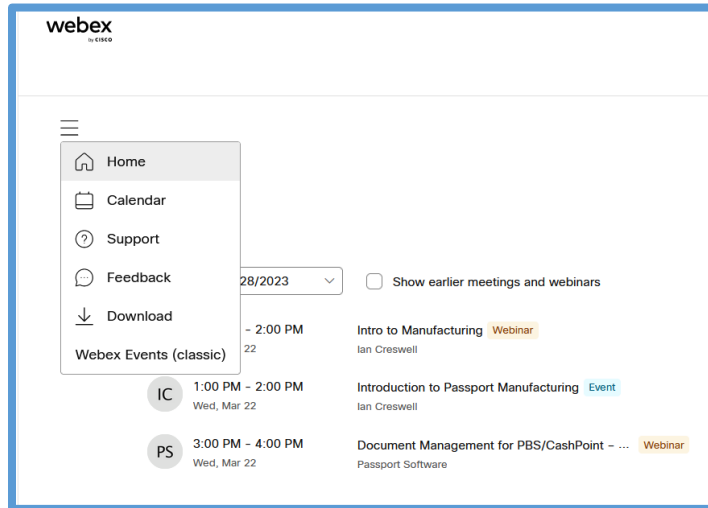
Spread sheets and other programs (like report generators) can provide valuable flexibility to your business "tool kit". For example, the SQL version of our product or the standard version with the addition of the AcuXDBC add-in, allows direct access to the PBS database from any SQL/ODBC compliant application – and there are many of these including MS Excel, MS Access, Crystal Reports, etc. Passport also runs several webinars a month discussing aspects of customized reporting using external tools. Keep a look-out for this and see below under webinars.

This area – customized reporting - is one that definitely deserves your attention; and is something that we have found frequently has a very high return on investment. This is particularly apropos since every business is unique, and while the accounting system can usually gather and store all the information a business needs, it is almost certain that reporting that information in a manner that suits the unique aspects of a business is not always satisfied by the standard reports. A report writer or spread sheet access to the PBS data can frequently provide customized solutions where the ROI is satisfied within a year.

Webinars

In addition to the webinars just mentioned – getting access to data and reports, as well as webinars involved with introducing new releases - Passport runs Webinars on a variety of topics. For example, an introduction to the Passport Manufacturing system is regularly given to allow people who are interested, to have a look-see. Another example is the CashPoint webinar for people interested in integrating their NCR CounterPoint POS system with our product. We are happy to explore and cover topics in the PBS and CashPoint systems, and invite you to suggest topics of interest. Please email your suggestions to psi@pass-port.com .

If you are interested in, but are not receiving announcements about Passport webinars, please take a look at the current schedule by going to <http://passportsoftware.webex.com> and in the upper left of the landing page click the three-bar menu link and select calendar:



Or, request that you be added to our mailing list by filling in the four fields here:

<https://app.hatchbuck.com/OnlineForm/82903446540>

We are aware that you can be wary of subscribing to lists and don't want your Inbox junked-up with annoying trash. You will be receiving our quarterly newsletter and the announcements of Passport Software webinars.

We hope this information proves beneficial to you, and we always look forward to your feedback and suggestions.

The Passport Team