

NEWS

January
2007

Consultant's Corner



Accordant is pleased to announce that Swati Raje has assumed the newly created position of Director of Client Services. In this role, she will be the primary contact for all client related matters for all product lines. She will lead our client services group, providing overall direction and management of consulting, training, and report writing services. She will also be responsible for:

- The assignment and scheduling of consultants to best suit client needs
- Developing policies and procedures for Accordant's consulting division
- Identifying outstanding issues



Accordant Company, LLC

Are You Missing the Link to Higher Productivity?

More than 1,000 Sage Timberline Office clients (over 10% of all Sage Timberline Office accounting clients) now depend on Excel and Office Connector (OC) to provide much of their management reporting, data analysis, and client reporting.

Office Connector Query and Write represent the most significant advancement in data analysis and reporting since Crystal Reports. Released in the spring of 2002, Office Connector Query (OCQ) from Event 1 Software signaled the next level of Sage Timberline Office end-user reporting and real-time analysis by allowing end users to create Excel workbooks with dynamic links to their Sage Timberline Office database.

Clients use OCQ to create their Financials, interactive Job Reports, Rent Rolls, Variance Reports, and more.

In 2005, Event 1 announced the ability to write information to Sage Timberline Office ODBC replaceable fields from within Excel. End users could then solicit information from various areas within their company, review that information, then write it directly back to the Sage Timberline Office database without using Microsoft Access and without manually entering information into fields on Sage Timberline Office screens.

FIRST THERE WAS OFFICE CONNECTOR QUERY

"We have used the Office Connector to analyze data from the General Ledger, Cash Management, Job Cost, Payroll and Accounts Payable. The possibilities are only limited to our

with clients and develop procedures to provide better service

- Providing support to Accordant's consulting team in their daily activities
- Instilling best practices and providing technical and tactical assistance to all Accordant team members

Swati has been providing Accounting and ERP software solutions to clients since 1993. In 1996, Swati became one of the first Timberline Certified Consultants in the NY/NJ area. Swati has a Bachelor of Science degree in Computer Science from Long Island University – Brooklyn, and an MBA in Business from Hofstra University. She became a Certified Public Accountant in 2001.

Swati can be reached at our main office in Whippany, New Jersey, 973-887-8900 extension 105, sraje@accordantco.com.

Welcome to the Accordant Newsletter! Our goal is to educate Sage Timberline Office users by providing valuable information on products, training, and tricks of the trade. We also plan to share Accordant & Sage Timberline news and upcoming events. Accordant provides leading-edge business solutions to construction, service & real estate businesses in New York, New Jersey, Connecticut and Pennsylvania. We specialize in the implementation, consulting, and training of Sage Timberline Office Solutions.

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imagination..." - Excerpt from client quote

Prior to 2002, if an end user wanted to get current Sage Timberline Office data into Excel they could 1) Learn MS-Query with ODBC, or 2) Export data to a text file via a report or inquiry, then bring it into Excel.

When OCQ was released, Event 1 offered three things not previously available: 1) The ability to select a Sage Timberline Office data folder from a list versus setting up a data source (DSN), 2) A wizard driven query accessible from WITHIN Excel, and 3) Four Sage Timberline Office-specific Excel functions (i.e., TSLookup, TSFind, TSCount and TSSum) allowing a user to precisely place Sage Timberline Office data within cells.

For the first year OC did not come with any pre-built templates. End users were required to build Excel workbooks the way they wanted using OC tools. The first 100 customers recognized the potential of OC because they were trying to create solutions in Excel and could see how OC could produce these more quickly.

THEN THERE WAS WRITE

"Their specific need was GL budgeting. This process has been very, very arduous for this customer, sometimes consuming up to six months. This year, with a limited roll out of Event 1 (both office connector query and write) they were able to cut this process down to a month!" - Excerpt from business partner quote

As the OC user community grew, Event 1 wanted to deliver greater functionality to their end users. They were experienced writing MS-Access solutions and were intimately familiar with the limitations and challenges of deploying solutions in Access. The two choices for a second product in the OC product suite was either a product to aid in importing or a product that could write values into ODBC replaceable fields. At that time it was possible for an end user to create a file to import transactions if they followed the format set down in Sage Timberline Office help. However, there was no way to write data directly back to ODBC replaceable fields, so Event 1 released OC Write.

A BETTER MOUSE TRAP

"I've already set up a worksheet with a macro that allows us to quickly calculate and distribute our GL insurance using imported Direct Costs in Job Cost that pulls data from payroll, JC billings, and JC cost transactions. It would have taken me days to set up all the Access queries that would have been necessary to make

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SAGE TIMBERLINE OFFICE

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this happen...with OC Query, I did it in a matter of hours and we're using it to create the import entries that go directly to Sage Timberline Office. What a time savings! Great product!" - Excerpt from client quote

The Sage Timberline Office end-user community represents the people who know how to use Excel best. At Event 1, they have learned more about Excel from interacting with their end users than they have from any other means.

OC, as an add-in to Excel, allows end users to stay in Excel as they create links to the data they want in their Sage Timberline Office database.

"It's all about transferable skills," adds Tim Schmick, Event 1 Software Support Representative. "You can't really be an accountant without working in Excel. It's a comfortable environment and Office Connector allows them to stay in a workbook environment pulling information into Excel."

WAIT, IT GETS EVEN BETTER!



In early November 2006, Event 1 released a stunning upgrade to OC - OC 2.1. Enhancements include:

- New, improved wizards
- Graphical view of criteria
- Refresh when ready

SOL OR SQL

Structured Query Language, or SQL, is a powerful ally to those who know how to use it, yet many people run in terror when it is mentioned. The key to unlocking the power of SQL is practice, familiarity and having examples to apply.

In advanced training for OCQ, SQL is covered as it pertains to Excel and mining data effectively out of the Sage Timberline Office database.

As an example, let's say you want to add all the cost transactions for a job and display the result in a cell on a worksheet. You could



use the OCQ function TSSum to reach into Sage Timberline Office, sum the amount field on the Current.JCT record with a condition that the job = the desired job and that the transaction type = transaction types you wish.

Example:

```
=TSSum("CURRENT_JCT_RECORD_1","TAMOUNT","TJOB='03-001' AND TRANTYP='AP cost'")
```

In this case you could add up a string of TSSum's, or create a more complex filter so that only the transaction types you desire are summed. Even if you did this, however, the function would default to pull all the fields from the JCT file (i.e., job, extra, etc.) then examine the job and transaction types that you want, then add the amounts together.

A more efficient way to do this so that you are only looking at the fields on the JCT record that pertain to what you want to sum might be:

1) Place the portion of the TSSum function that identifies what you want to sum in a cell, say, A7

```
= "SELECT TAMOUNT FROM CURRENT_JCT_RECORD_1  
WHERE TJOB='03-001' AND TRANTYP IN ('AP cost','EQ cost','IV  
cost','JC cost','PR cost')"
```

2) Reference this cell in your TSSum function

```
=TSSum(A7,"TAMOUNT")
```

Both methods will give you the desired result, however, the second is much faster.

REQUIREMENTS

In order to use OC, you need to have Sage Timberline Office, the Sage Timberline Office ODBC driver, Excel, and then install OC.

OC is an Excel add-in, so once you install it you run it from within Excel.

For a more complete understanding of requirements, please visit Event1's website by [clicking here](#).

ABOUT EVENT 1 SOFTWARE

Located in Vancouver, Washington, Event 1 Software is a

leading integration software developer specializing in integration with Sage Timberline Office. Since 1998, Event 1 Software has provided technology to thousands of forward thinking end users of Sage Timberline Office. This is represented by a suite of Microsoft Excel integration products including Office Connector Query, Office Connector Write and Forecast for distributed Project Manager Cost forecasting.

Contact Event 1 Software, Inc by emailing sales@event1software.com or calling 360-567-3750. View Event 1 products by visiting www.event1software.com.

Upcoming Webinars and Training Classes

For more information or to register for a training session, please click on a link below or call Kathy Morris at 973-887-8900 x103 or email kmorris@accordantco.com. Accordant training classes are held in Parsippany, NJ at the New Horizons Computer Learning Center.

Upcoming Webinars

Field2Base

is a wireless field service and two way communication tool that allows you to increase the productivity of your mobile workforce.

Jan. 12

Office Connector

is an Excel Add-In that allows you to access your Timberline Office data quickly and easily.

Jan. 9, 16, 23, 30

On-Screen Takeoff

uses cutting edge technology to generate takeoffs directly from your PC screen.

Jan. 26

Project Management

simplifies how you manage projects by providing quick access for costs, contracts and document information.

Jan. 10, 24

Classroom Training: A Powerful Way to Make the Most of Your Sage Timberline Software

Service Management

January 16-17

Crystal Reports
February 12-13

Real Estate Accounting
January 29-31

Project Management
February 1

Estimating
February 5-7

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Please feel free to contact us with any questions, concerns or comments at 800-363-1002 or info@accordantco.com.

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The Accordant Team

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