



Break Information Bottlenecks With Remote Access

By Mark Robillard

There was a time not so long ago that connecting staff members from home, a client's office, or a hotel room wasn't only impractical, it was virtually impossible. But then came the internet.

Before the internet, the only option was modem-to-modem. A staff member with a modem-equipped laptop could connect to a modem-equipped computer inside the office. But the connection speeds were tortuously slow, and connections were frequently dropped without warning or reason. Now, while not a perfect solution, remote access can be useful and productive.

It's important to understand what remote access actually means. In terms of Clients & Profits, remote access can allow people who work outside the office to work as if they're physically in the office, within limits.

There are several approaches to take to provide remote access to Clients & Profits. The one that's right for you depends on who needs



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BREAK INFORMATION BOTTLENECKS



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remote access and what things they need to do outside the office. The first step is to identify who needs remote access.

Need to know

There's always been an obvious need for account service, production, and creative staffers to trade information about clients, jobs, costs, and billings wherever they are. These people are frequently out of the office, but are often the first to know about new jobs, schedule revisions, change orders, and more. But without any way to notify the office, the office-bound staff members aren't made aware until well after the fact—when the staff members finally return to the office and the data is entered into Clients & Profits.

Information becomes available to everyone

Remote access gives these staffers a chance to open new jobs, enter estimates, revise schedules, and more from any internet connection—from a client's conference room, from a hotel room, from a photo shoot, or from home. The information gets into the shop's Clients & Profits database virtually as it happens (or at least much quicker than before), and becomes available to everyone else who needs it.

So if the business case for remote access can be made, how can it be done? The approaches to remote access are readily available and inexpensive. But the

technology is new and immature, and not foolproof. It can require an extensive amount of troubleshooting to work out the bugs, as well as flexibility on the part of the users to tolerate disruptions and delays.

All of the remote access options are internet-based, and all offer varying degrees of accessibility. Remote control programs such as *Timbuktu* and *PC Anywhere* let one user

access Clients & Profits by taking over and controlling a designated computer at the office via remote control.

AppleShare, *Windows 2000*, and *Citrix Metaframe* allow remote users to access the shop's file server just as if they're in the office. *My Clients & Profits!* offers web browser-based access for creatives, account service, and freelancers. And, there's *Clients & Profits SQL*, which connects both remote users and branch offices together, offering complete access to both production and accounting functions from any internet connection.

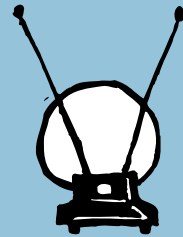
What will work for you depends on your users

Choosing the right kind of remote access depends on what kind of people need to

work outside the office, such as work-at-home bookkeepers, freelancers, AEs who constantly travel, production staffers on location, and agency principals who just like to keep up with the day's new jobs anywhere they are.

So while remote access can help keep your shop's out-of-office staffers in touch wherever they are, but there are several factors to consider first, including some that are purely technical. Most importantly, ask yourself if

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How to work from home on Clients & Profits

Only a few years ago, working on Clients & Profits from home involved spending thousands in expensive hardware and monthly access fees. But new technology has made high-speed internet connections affordable and widely available. To work from home, your options include:

■ Dial-up modems

Most people use 56k modems to dial up their internet provider and connect to the internet. The biggest advantage to modems is that they can be used anywhere from any telephone line, including cell phones. The disadvantage is speed, which may be too slow to be usable for running Clients & Profits with *Timbuktu* or *PC Anywhere*. Because it is web based, *My Clients & Profits!* is optimized for dial-up modems and works well at slow speeds. Cost: \$20/mo.

■ DSL

DSL offers high-speed, always-on internet access over regular home phones lines. The speed is 2-3x faster (but can be even faster) than dial-up modems, making it practical for running Clients & Profits with *Timbuktu* or *PC Anywhere*. Cost: \$40/mo.

■ Cable

Cable modems have the same basic performance of DSL, but are only offered by your cable company that have digital lines. Cost: \$40/mo.

■ ISDN

ISDN is all-digital service offered by phone companies that runs twice as fast as dial-up modems, but slower than DSL or cable. You'll find it in older areas where DSL is not available. Cost: \$50/mo.



WHO NEEDS REMOTE ACCESS?

By Kent Richardson

There are four likely types of staffers who need to work remotely:

Work-at-Home Bookkeepers Small shops often have outside bookkeepers who work from home, whether for family reasons, because they work part-time, or live too far to commute. A bookkeeper working at home needs access to Clients & Profits to enter the day's invoices, the week's staff time (if they don't enter time themselves), prepare checks for vendor payments and company expenses, bill clients for completed jobs, process payroll, and print reports. For these staffers, a *Timbuktu* or *PC Anywhere* solution over cable, DSL, or ISDN lines would be ideal.

Freelancers These days freelancers are frequently used to handle surges in new work, as well as handle special projects for which the shop doesn't have the in-house resources. Freelance creatives are typically interested only in creative briefs on jobs to which they're assigned, production deadlines for which they're responsible, and maybe tracking their time on the agency's time cards. (My Clients & Profits! is an especially

good solution for creatives, since they don't need access to accounting.)

Account Executives Account service staff members, including account executives and account supervisors, usually need enough access to Clients & Profits to open new job tickets for their clients, track the status of production and traffic for their clients' jobs, review job costs to track budgets, add change orders, and review billing previews when their clients are ready to be billed. They may need infrequent but instant access to job information while meeting with clients in order to keep them informed about their open projects. AEs need access to Clients & Profits while on the road for any of these reasons. Remote access for account executives almost always involves a laptop with a modem connection.

Principals Agency owners and senior management can use remote access to review each day's newly-opened jobs from home or from a hotel room.

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Working from home with Timbuktu

Timbuktu (www.netopia.com/software) is the leading remote connectivity solution for Mac and Windows. It allows remote users to access a company computer from home (or any location) using an internet connection (e.g., modem, DSL, cable, etc.). With Timbuktu, you can work on Clients & Profits from home just as if you were sitting inside the office.



There are two parts to Timbuktu: the client and the host. The *host* is a computer at the office that's running the Timbuktu software. It is a standard Mac or PC that has Clients & Profits already installed. The host computer is connected to the C&P database, just like any other user, then waits for a remote user to connect to it. The *client* is a remote user's computer, which also has Timbuktu installed on it. To connect to the host, the remote user starts the Timbuktu application then connects to the host by entering the host's IP address. The host's desktop then appears on to client's screen. The remote user is now in full control of the host computer at the office, and can run any program, such as Clients & Profits, that is installed on the host.



From inside the office, the host computer looks like it's being operated by a ghost—windows open and close, menus commands are chosen—as the remote user works. There are some limitations, though. Only one remote user can work at one time, and reports can't be easily printed to the remote user's printer. Also, if the host computer is turned off for some reason, remote users can't connect to it.



A high speed internet connection at both home and the office makes Timbuktu usable for just about everything in Clients & Profits, but regular modems can be used as well. It's also cross-platform, so a Mac can control a Windows PC and vice-versa.

YOUR OWN HOME PAGE

My Clients & Profits! lets staffers access clients, jobs, and timecards from any web browser

My Clients & Profits! is an add-on web server for your Clients & Profits database that allows anyone to track clients, jobs, production and traffic, job costs, time and expenses from Internet Explorer, Netscape Navigator, or any other web browser. It lets accounts executives, creatives, and other out-of-office staff members real-time access to your shop's data. Each web user has his or her own Home page that contains links based on their access privileges.

1. Each My Clients & Profits! web user has a personalized home page, whether they are a staff member, freelancer, client, or vendor.

2. A special "welcome" message greets you on your home page. (This greeting is edited in the user's Access & Privileges window by a web server administrator.)

3. Customizable help pages are available from every My Clients & Profits! web page.

4. Each web user can access selected client, job, traffic, and job costing functions based on their My C&P! access privileges. These user-defined privileges work together with the standard Clients & Profits access privileges. Some users will see more or fewer links, depending on what they are authorized to use. The graphics used for each link are GIFs that can be replaced with your own custom graphics.

5. The lookup lists in the My Clients & Profits! web server look like the ones in Clients & Profits. They give you the same access to client, job, vendor, and other quick-reference lists, as Clients & Profits users.

6. The optional company calendar is a special collection of links to company events, meetings, and important dates. Each calendar event has its own web page, which is served by My Clients & Profits! These pages can only be accessed by authorized My C&P! staff members, so they aren't public.

7. The Company News section promotes company propaganda, including new hire announcements, account wins, acquisitions, and other newsworthy stories.

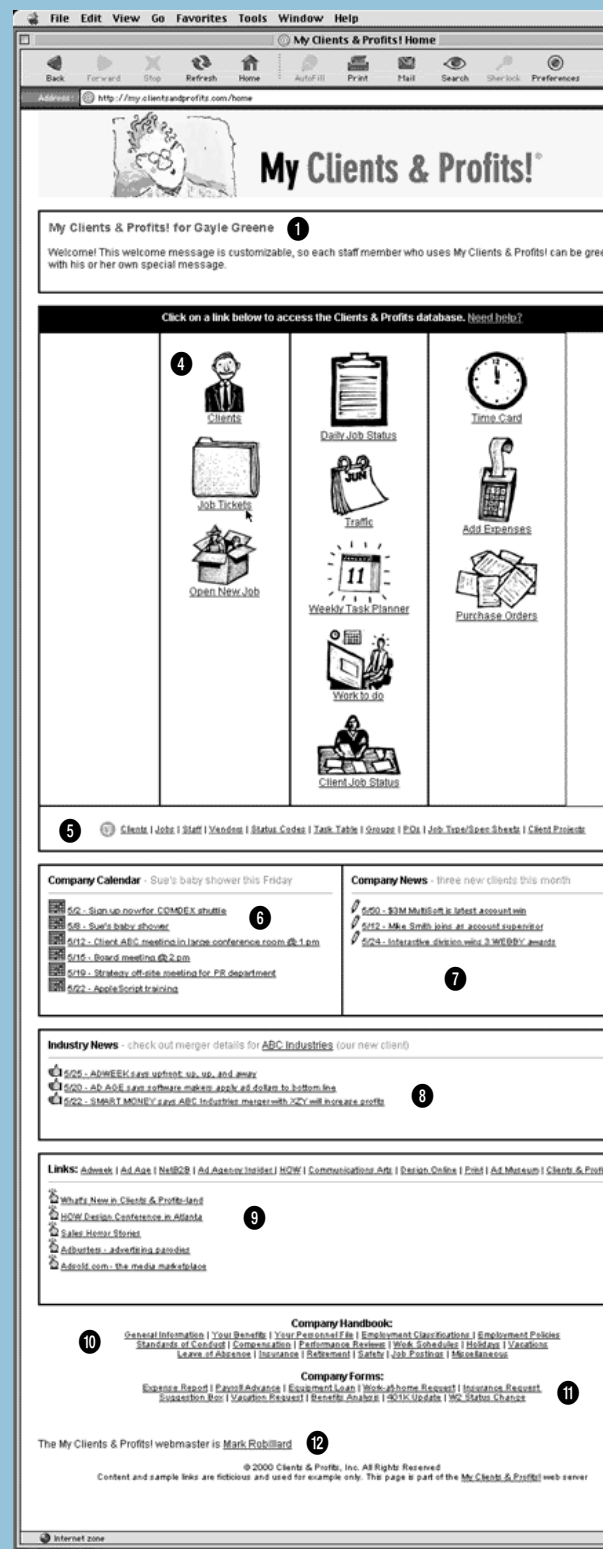
8. Keep up with industry news, gossip, and events using these customizable links.

9. You can easily access web sites that the company considers valuable by clicking on these links.

10. My C&P! can serve pages from a private, online company handbook. Your existing handbook can be copied into web pages (or use PDF files) that are easily linked to the staff member home pages.

11. Web-based versions of commonly-used company forms can be made available to staff members whether they're working inside or outside the office.

12. E-mail can be instantly sent to the My Clients & Profits! webmaster by clicking on this link.



See more examples of web pages:
www.clientsandprofits.com/my

My Clients & Profits! web pages can be customized in web design programs, such as FrontPage, GoLive, and Dreamweaver. Web pages are intentionally uncomplicated, so it's easy to redesign them to match your shop's design style. When a user accesses a web page, data from your Clients & Profits database is downloaded into special HTML tags called OMTAGS. They can be added, deleted, or modified to change what data appears on a web page. All of the design elements (e.g., tables, lines, graphics, backgrounds, etc.) can be customized.

1. The banner at the top of the page can be replaced with your own custom banner.

2. Each authorized web user (including clients) sees their own custom My Clients & Profits! home page, which is based on the *home.html* page. There are special home.html pages for clients, vendors, and the web administrator, each with slightly different links that are appropriate to each kind of user.

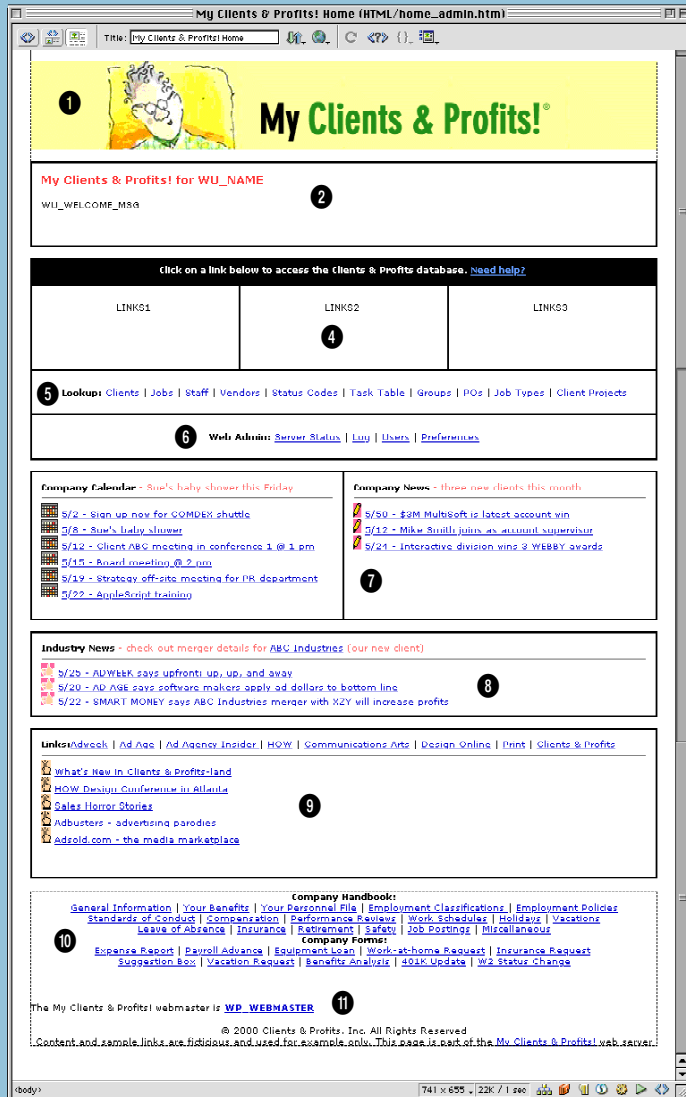
3. Web-based help pages contain instructions for using My Clients & Profits! They can be customized to contain your own company's special instructions, work flow, and procedures.

4. A user's home page links are created dynamically based on his or her access privileges, which are set by the My C&P! web administrator. The graphics used by these links are stored in an "images" folder and can be replaced with your own GIFs.

5. The "lookup" links work like regular Clients & Profits lookup lists. Each lookup list is a separate web page.

6. Web administrators have special links for tracking and managing the My Clients & Profits! web server anywhere from any web browser.

7, 8, 9. Links to company calendars, company news, and industry links are optional, but can be exceptionally useful. These links essentially give staff members a web-based company bulletin board that can be updated anytime.



10. The company handbook and forms sections provides links to custom web pages containing employee information. If your shop isn't interested in providing online access to the company's employee handbook, remove these links.

11. Web users can instantly and easily get in touch with the My C&P! web administrator using this e-mail link. The name and e-mail address of the web administrator is entered in the My C&P! preferences, so isn't hard-coded on the home.html page.

REMOTE ACCESS QUESTIONS AND ANSWERS



Q. How much slower will Clients & Profits be when I work remotely?

It depends on both the speed of your office's internet connection and your remote connection. Working on Clients & Profits via Timbuktu/PC Anywhere by modem will be half as fast as working in the office (at best). Cable/DSL connections are about 25% slower. Of course, the more money you're willing to spend on hardware and ISPs, the faster you'll be able to work.

Q. Is a full-time internet connection required at the office for remote access?

Yes. The office's database needs to be available whenever a remote user wants to work.

Q. We can't afford a high-speed internet connection, but still want to work from home. What's best for us?

It depends on whether you need to do accounting or not. For creatives and AEs, My Clients & Profits! is the best solution since it's optimized for low-speed internet connections, such as modems. For stay-at-home bookkeepers, Timbuktu is a better choice.

Q. Our accountant works off-site in another state. What's the best option for connecting him with our office?

As long as only one person needs to work at one time, Timbuktu is the best solution. These remote access programs don't require a high-speed internet connection and are

inexpensive. However, printing reports can be a problem (see page 3). Also, they won't allow several users to work remotely at the same time.

Q. Do I need to have someone on staff dedicated to managing remote access?

No, in most cases. Setting up a remote access system and training users takes some time at first, but once it's running it needs very little ongoing attention and maintenance.

Q. If I'm working remotely, will a dropped internet connection damage the Clients & Profits database?

No.

Q. We have two offices in different states. Can My C&P! let the two offices work together?

No. My C&P! only handles some production and creative functions, as well as time tracking. Since it's designed for creatives, AEs, and production staffers, My C&P! doesn't offer enough billing, accounting, or management functions that people in the

remote offices typically need. To truly connect both offices, the only real solution is Clients & Profits SQL.

Q. Do we need to have an HTML expert on-staff to run My Clients & Profits?

No. My Clients & Profits! includes all needed web pages, so no programming is required. In fact, setting up the My C&P! web server isn't any harder than setting up Clients & Profits.



GUARANTEED GREAT IDEAS!

Remote Access Tips from Real Clients & Profits Users

These Clients & Profits users share their tips on how they work remotely:

Timbuktu Pro "Our remote users use their own internet access to a machine here on our LAN via Timbuktu Pro. It works is as if the remote user is sitting in front of a system here in the office," says Bill Raab of Larsen Design Office, Inc. "It works slick, and is probably your best bet in many instances."

Citrix over frame relay "We have a dedicated Frame Relay connection between each location, and those users use Citrix Metaframe. It works wonderfully. Speed is not especially wonderful (we have don't the fastest frame in the world), but works much better than when we used to mount our C&P volume the old way," says John O'Regan of Via Marketing. "The beauty of Citrix, of course, is that we can publish it for any user, whether they dial up through a modem or connect through a cable modem or DSL."

Citrix and Windows NT Terminal Server. "We are running Citrix Metaframe on a Windows NT 4 Terminal Server. We have been running this environment for 2.5 years and have found it provides very reliable performance for eight of our PC users. It creates a "virtual desktop" from any location, giving them e-mail, MS Office, SmartPlus media buying, etc. Users can enter time and perform other C&P functions when they are out of the office," says John Arevalo, CFO of Versant. "The speed is good. It's almost like being in the office."

Windows 2000. "We tried remote access a bunch of different ways and found huge success eventually. We tried a couple of variations of remote access (e.g., ARA, VPNs, etc.) which worked ok, but were a hassle to setup and were painfully slow. We finally reached remote Nirvana with Microsoft's Windows 2000 Terminal Server running on a dual processor Dell server. It's very fast and simple to install and maintain," says Troy Hickerson of Strategies. "It is actually faster than working from a PC on the LAN."

CONNECTING REMOTE USERS: WHERE TO START

By John Duffy



While the idea of remote access may seem easy, it's more complicated than it looks. So before starting a remote access project, consider the risks as well as the benefits. This will determine whether remote access is worth the cost—both in money, time, and stress. Ask these questions:

Can it work for us? Is your shop ready for a project this complicated, time-consuming, and potentially expensive. The answer involves looking at the sophistication of the people who'll use it, as well as the capabilities of the technical people who will install and maintain it. If the end-users are impatient and inflexible, then they're unlikely to tolerate the idiosyncracies of remote access—and will make your life miserable when things don't work. So if you don't have the resources available to configure and manage the system, you'll be forced to rely on expensive outside help when you have problems—or suffer downtime while you're trying to figure things out.

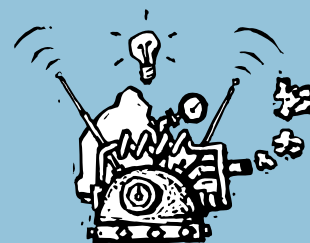
Are we overspending? It's important to find the balance between the features and

functionality people want (and will use) and the total cost (both hardware and labor) to set up and manage the system. For good or bad, there are lots of choices out there—and lots of vendors who will sell you what you really don't need. There are also lots of vendors who will sell you things that don't really work as advertised.

Is it worth the cost? You'll need to compare the benefits to your remote users versus the cost of the system over several years. (Be sure to take into account all potential ISP charges, consultant fees, hardware repairs and replacements, and software upgrades.) If the numbers make sense, then remote access will pay off.

So what's next? List your shop's needs, then get information about remote access software, hardware, and service providers. Try to talk to people who've done this before (the C&P user group is a great place to look). All this will help you find the remote access system that's right for you.

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How to Link Different Offices

While remote access solutions like Timbuktu and PC Anywhere do a great job of connecting stay-at-home bookkeepers and outside accountants to your shop's Clients & Profits database, they don't offer much for connecting different offices. That's because these systems only allow one person to access Clients & Profits at a time, which won't work at all in a multi-office environment. To support an office full of creatives, production staff, and accountants, you'll need Clients & Profits SQL.

A question of scale. Unlike other versions of Clients & Profits, Clients & Profits SQL uses Oracle or Microsoft SQL Server to process, store, and retrieve data. This makes it capable of handling the much larger databases created by companies with multiple offices. And because it is a client/server system, it is able to scale up to handle hundreds of simultaneous users from any location. Clients & Profits SQL offers speed, security, and accessibility that's never been available from Clients & Profits before. However, this capability comes at a price—client/server systems are much more expensive to use, requiring experienced database administrators to install, configure, and support.

What about My Clients & Profits? But couldn't a company simply use My Clients & Profits! to connect the remote offices? While My Clients & Profits! provides web-based access to clients, jobs, traffic, and time cards, it does not offer access to billing, financial accounting, or management reporting. So while My C&P! might work for remote sales offices, it won't work for full-service offices that need to bill clients, track payments, write checks, and print reports. For those people, the solution is Clients & Profits SQL.

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your shop has the know-how to choose, design, implement, and maintain a remote access system.

Adding remote access adds cost and complexity to your Clients & Profits system, and there's no certainty that it'll work to everyone's expectations. Speed, for one, is largely based on factors that are out of your control. There are several common things that can keep a remote access project from becoming an expensive, disappointing failure. They include:

1) Have access to experienced professionals who have done this before While it's certainly possible to self-install a remote access system, if you don't have the skills and experience that chance isn't on your side. You'll undoubtedly spend many more hours

than you'd planned to set up the system, and it will take longer to work. At the very least, have someone experienced available to help you troubleshoot any problems you may encounter (remember, the Clients & Profits Helpdesk doesn't provide technical support for remote access).

2) Spend the appropriate amount of money Make a realistic plan for the needs of your remote staff members, then buy the hardware, software, and infrastructure that will meet their needs. For example, spending the money on a T1 connection will support more remote users than a cheaper DSL, cable, or ISDN connection.

3) Train remote users, then follow up on their progress Staff members who don't work inside the office won't benefit from the feedback that internal staffers get from their co-workers. You'll need to make a special point of informing remote users about any mistakes or bad habits that they're doing (usually by accident). These users are usually the last to know about a change in procedure, so they cause a higher number of errors. Consider setting up a mailing list of remote users to communicate tips, suggestions, and

corrections quickly and frequently.

4) Develop a system to monitor performance Someone with technical savvy needs to be in charge of the system. They need to have the training, experience, and tools to manage the system, train remote users, and troubleshoot any problems. Most remote access systems track who's using the system on activity logs. The activity log in My Clients & Profits!, for example, shows the date and time each web user accesses a web page. These logs run automatically in the background. Windows 2000, Timbutku, and PC Anywhere also keep activity logs.

With more people working outside the office, offering remote access to Clients & Profits will pay off with better communication, which means fewer errors and expensive delays. And with today's technology making it easier and more affordable, now might be an ideal time to implement remote access.

Mark Robillard is the co-founder of Clients & Profits and the software's designer.

CLIENTS & PROFITS is job production and accounting software designed especially for creative businesses. Since 1986, more advertising agencies have chosen Clients & Profits over any other agency management software for Macintosh and Windows. Over 2,200 ad agencies, graphic design firms, and corporate marketing departments use Clients & Profits to track jobs, costs, and billings every day. For more information, send email to info@clientsandprofits.com.

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