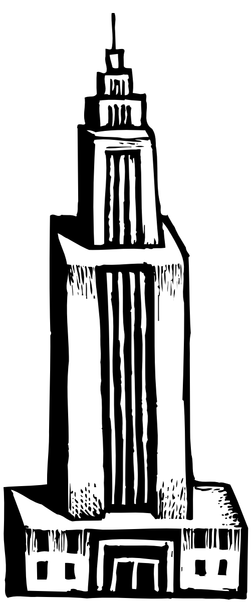
Be a Database Superhero With Better System Management

By Mindy Williams



Answer this riddle: What is everywhere, yet only in one place, at the same time? What needs optimum health, yet can't have its temperature taken?

Got the answer? It's your Clients & Profits database. And it's your network that requires optimum health in order to manage the diverse hardware, software, and documents necessary to run your agency.

A good system manager could probably answer those questions with little effort. Hopefully you have a hero to answer the call when the system needs help. You're courting disaster without one.

The Clients & Profits system manager is usually not a one-hat position. Instead, it's an important responsibility added to someone's normal duties. The Clients & Profits system manager might be the general system manager, controller, AE, or an outside company that specializes in system management.

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Hero wanted, apply within

"Our owner asked for a volunteer to take on the responsibilities of C&P system manager—and everyone but me took one step back," says Ray Williams, chief financial officer at Robert Rytter & Assoc. "I'm also the IS manager, but if I run into a situation where I need assistance, we have an outside service that helps with any highly technical aspects of system management."

Angela Albanese, accounting supervisor for Bandy Carroll Hellige Advertising, became the C&P system manager after a horrific chain of events. "When the IT employee crashed our system, we discovered that the database hadn't been getting backed up daily," Angela says. "We lost three month's worth of data." Now Angela makes a daily backup, with a permanent weekly backup on a CD.

Where roads converge

While C&P system managers should know all the technical issues of Clients & Profits, they can't be responsible for the quality of data entered. But system managers should be aware of what needs to be entered to ensure a good start, and what needs to be done to keep the database running smoothly.

Jerry Bray, Maryland-based Harvey & Daughters' CEO, played a crucial role in choosing Clients & Profits. The agency pulled key staffers from both the creative and business sides of the shop to work on the initial setup. "We even brought in a C&P consultant a few times to ensure that we got it all right the first time," he says.

Managing your agency's database might sound like an overwhelming responsibility, but the chore can be subdivided into three key responsibilities: (1) database backup, (2) communicate with users, and (3) take a proactive role in maintenance.

Managing your database isn't an overwhelming responsibility.

A simple strategy of planning ahead for growth, communicating with users about identifying problems, and doing preventive maintenance can keep your Clients & Profits database happy and productive year and after.

Safety first

First, back up your database daily to a reliable, removable media like DAT tape or a CD-R. Save at least one week's worth of data (two is better) before rotating the storage media to overwrite it. Also, establish a rotation procedure so that you are taking one copy of your backup off site to protect it from fire, floods, theft and other disasters. Be sure to make a monthly backup of your database for safekeeping. "We use Retrospect and DLT tapes to back up all files overnight, Monday through Friday," says Marilyn Power, operations director at Fort Worth-based Stuart Bacon. She keeps a couple of spare tapes on hand in case one becomes damaged so the backup routine is never disrupted. "I also take the two most recent backup tapes home with me in the evenings," she says.

Restore and check your back up periodically so you are certain that the procedure is

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C&P system management terms explained

If you're new to Clients & Profits, you'll probably run across these unfamiliar terms:

Updates contain minor revisions, enhancements, and fixes to the Clients & Profits software. They are released every quarter for C&P Pro and twice a year for C&P Classic and are available free to users with support subscriptions. Updates are available for downloading from the C&P web site. Updates are announced on the What's New web page and via email to members of the C&P User Group (www.clientsandprofits.com/support/user_group). You aren't required update your software (we still support every version we've ever made).

Upgrades are new versions of Clients & Profits that feature substantial new features. Clients & Profits upgrades are produced roughly every two years. Upgrades are usually more work to install than updates and sometimes require some automatic data conversion. Upgrades are optional and often are sold separately.

Patches are mini-applications that fix bugs between regularly updates. They are used temporarily to solve problems that can't wait to be fixed until the next update (which are rare). The fixes include in patches are always included in the next updates.

Plug-ins are mini-applications that add custom functions to Clients & Profits, such as printing a custom form. Some consultants provide plug-in programming for an extra cost.

My C&P! is a web server add-on that offers real-time, browser-based access to jobs, traffic, time cards, and more from any internet connection.

Omnis is the 4GL relational database management system in which Clients & Profits was developed. It is the engine that runs Clients & Profits, much like Excel is the engine that runs spreadsheets.

THE TRUTH ABOUT COMPATIBILITY

By John Duffy

It's an age-old myth, fueled by years of platform loyalty, that Macs and PCs don't work well together.

It's time to set the record straight. More than ever, Macs and PCs work on the same network seamlessly, increasing your productivity and communication—while taking some heat out of the desktop wars.

No matter what the platform mix, the heart of your cross-platform network is the server. Luckily, cross-platform networking has been integrated with newer Mac and PC servers, creating unprecedented stability, usability, and affordability.

Also, a server-based setup decreases the potential for network instability. (While many third party networking programs advocate peer-to-peer networking, third party solutions have become the unstable and potentially costly alternative to a server-based setup.)

Cross-platform networking is easily set up, but there are a few issues to consider.

First, the file access privileges must be set up correctly, and Clients & Profits users need to have access to the database file.

Second, the database needs a *.df1* extension. (If you have database segments, each segment must be numbered consecutively, *.df2*, *.df3*, etc.)

Third, ascertain that your network hardware is solid—that way you'll have one less thing to troubleshoot if you have problems.

Whether you already have a cross-platform network, or are considering installing one, spend a few minutes on the Clients & Profits Cross-platform FAQs page. (Follow the links for Mac, Windows, and Cross-platform FAQs from the System Manager Resource page at *www.clientsandprofits.com/support/sys_mgr.html*) You'll find current information to help get your network running smoothly, plus dozens of other helpful tips.

John Duffy is a senior member of the Clients & Profits Helpdesk. He can be reached at john@clientsandprofits.com.

Who should be the system manager?

It's a fact that most system managers didn't volunteer for the job. Most fell into because no one else would do it, they were the most technically-minded person at the shop, or they happened to know Clients & Profits the best already. For whatever reason, the qualities you should look for in a system manager are listed below. If you're considering (or are being considered for) the job, here are some traits that every great system manager should have:

Passion If there is no enthusiasm, you will not get the most out of Clients & Profits.

Control If the information that is entered is not accurate, the reports from Clients & Profits are useless.

Logic Makes it easier to understand the relationships between the parts of the program. Also, helps in understanding setup and maintenance.

Dependability Since all of your company's accounting and production data is in Clients & Profits, you must be able to depend on that data and the person administering it.

Thoroughness Closely linked with control and dependability, this will ensure good use of Clients & Profits as a tool as well as accurate data.

A technically-inclined mind If there are problems with the database or your computer hardware, being technically minded gives you an advantage over others who can't troubleshoot these kinds of situations—and usually panic

Bravery In many companies, administering Clients & Profits is no small task. It takes courage to take it on, get the work done, and stick with it.

MANAGING YOUR DATABASE

Power tools for the Clients & Profits database superhero

Database Utilities is a collection of data management tools designed to help the C&P system managers maintain their databases. These tools track and control the database's size, test it for damage, and export/import data to and from other systems. User access to Database Utilities is controlled from the Users, Access & Password window, so only someone with the right access can open Database Utilities, as well as the other areas located on the Utilities menu. Access should be restricted to only those who are responsible for administering the database.

1. The **Check Status** toolbar button checks and reviews the current status of each data file in the database. Clients & Profits checks each data file for damage, then displays the results in the Status column.

2. The **Repair** toolbar button repairs any damage found in the selected data files.

3. The **Change Database Size** toolbar button pre-sizes the database or adds a new segment if space in the first segment is running out..

4. The **Export** toolbar button sends data from Clients & Profits to any database, spreadsheet, or word processing program (e.g., for mail merging, etc.). Use the **Import** tool-bar button to bring data into Clients & Profits from any text spreadsheet using specially-formatted text files.

5. The **Graph** toolbar button displays a bar graph showing the growth of the database. The database's size is calculated each time the button is clicked, creating a different point on the graph. The graph is a helpful tool for tracking the database's growth over time. Clicking the **Print** tool-bar button prints a list of the database's data files, record counts, size, status, and a graph of the database's growth.

6. The name of the database and its path (location) on the file server or wherever it resides appear for reference. If you use multiple databases, the name and path are different for each database.

7. File size is the physical size of the database file on the server's hard drive. In contrast, data size is the actual size of the records stored inside the database. When you pre-size the database, the file size increases. As new data is added to the database, the data size increases. When the data size nears 256mb, a second database segment should be added.

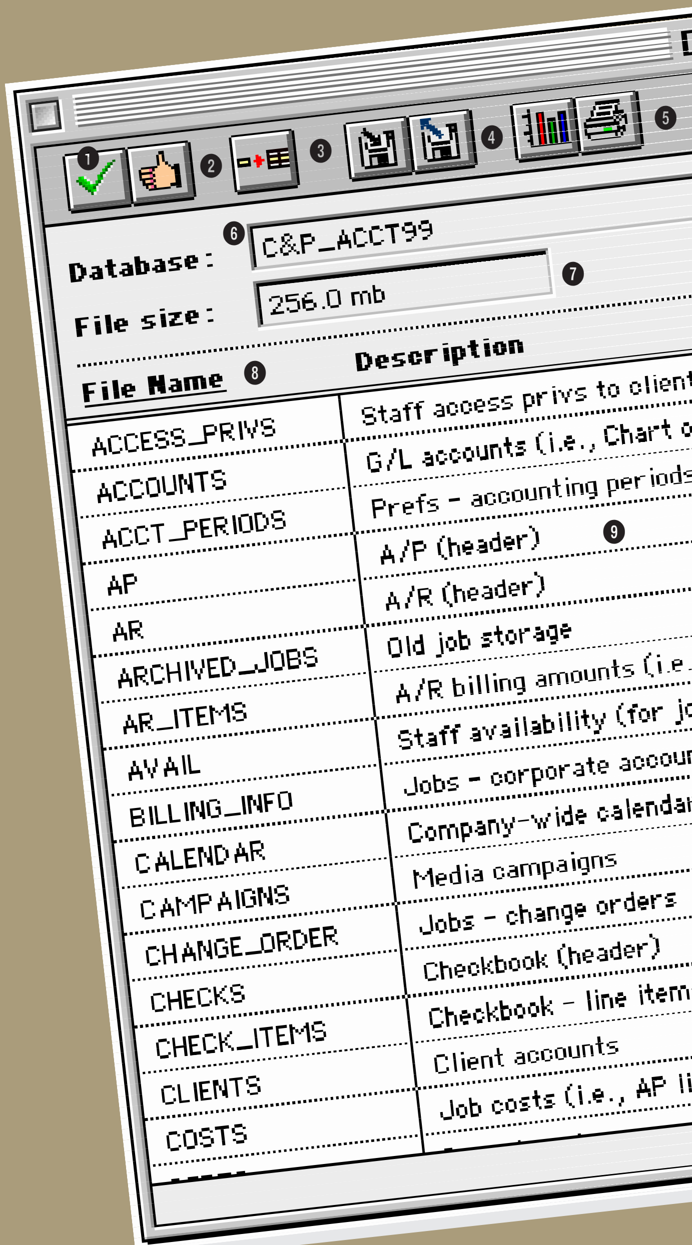
8. The names of the database's data files, (e.g., CLIENTS, ACCOUNTS, etc.) are listed alphabetically. For each data file, you'll see its name, description, number of records, size, and status. The data files are sorted by clicking on a column heading. The sort directions are changed by clicking on the up/down arrow buttons.

9. The name of the data file indicates the purpose or function of each file. The file names are preprogrammed and can't be changed.

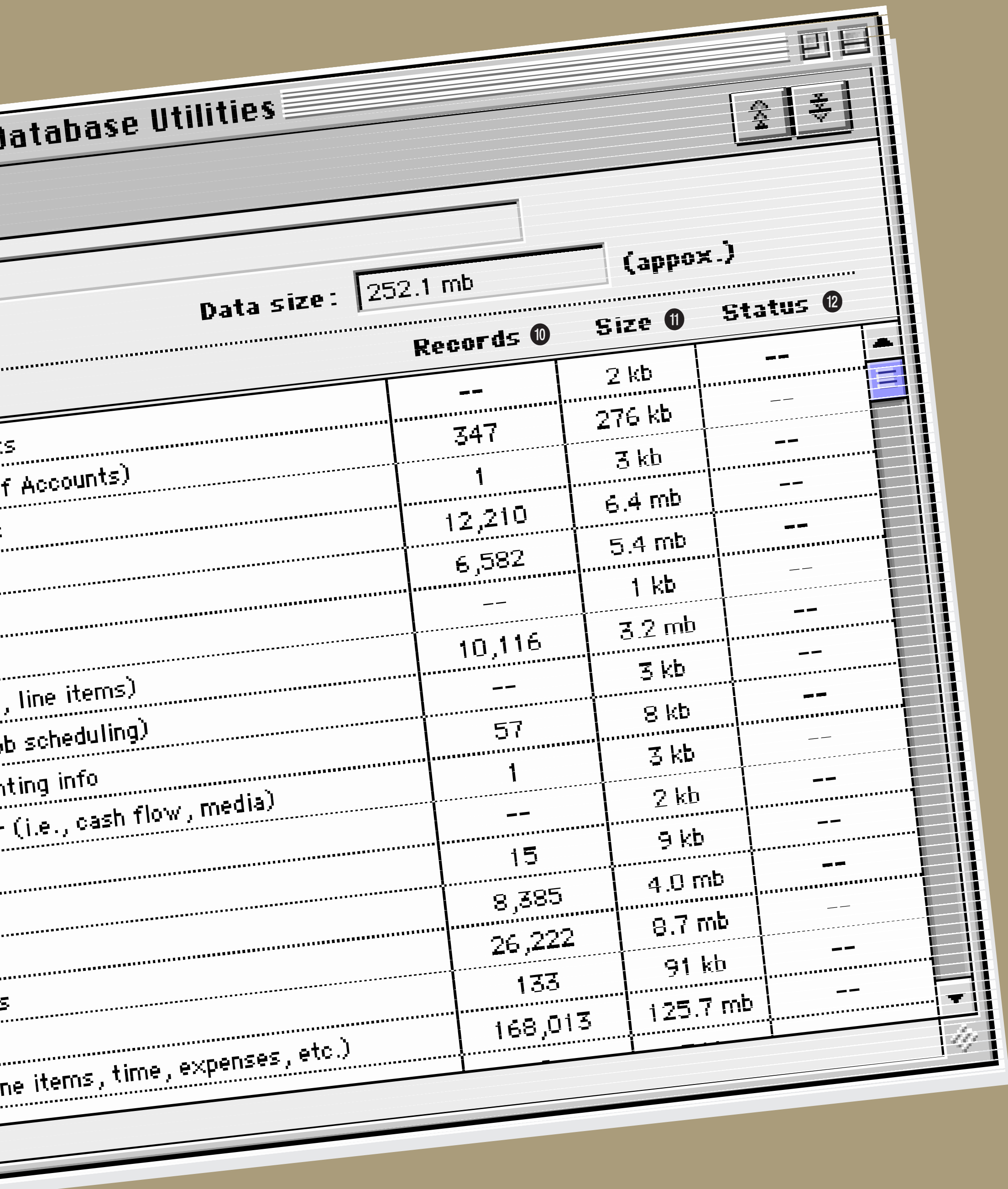
10. The number of records for each data file are shown for reference.

11. The size of each data file is based on the number of records stored in each file.

12. The status of each data file indicates whether it is currently working properly (i.e., "ok") or needs work (e.g., "reorga-nize" or "repair").



Get inside information on your Clients & Profits database:
www.clientsandprofits.com/support/database_guide/



The Database Utilities functions include:

Quick Check opens the Data Log which keeps a record of the activities performed through Database Utilities. This log can be printed.

Check Data File(s) performs a top-to-bottom check on the database's integrity. It is a more elaborate and thorough--and much slower--version of the Quick Check.

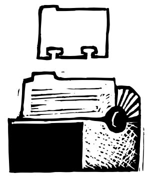
Check & Repair All first checks every data file in the database for damage, then attempts to repair any problem it finds.

Reorganize (Optimize) Selected File(s) converts data from older versions of C&P to the latest version. Reorganization usually happens automatically the first time a new software update is installed. It is used only in special cases where the conversion didn't finish.

Reindex Selected File(s) rebuilds the index table that is used to remember where each bit of data is stored in the database. Indexes are selected fields that are used to find records, such as job numbers and client codes. Each data file has its own index, which is updated each time a record is saved. If an index is damaged or incomplete, some records won't appear on reports. This tool ensures that the indexes are valid in each data file.

Repair Selected File(s) attempts to repair damage on data files selected by the user, instead of repair all files. It's a more selective version of the Repair All tool.

SYSTEM MANAGEMENT QUESTIONS AND ANSWERS



Q. Our users are asking for different fonts on reports and forms in C&P. Is this possible?

Font settings in Clients & Profits are not specific to individual reports and forms, so the quick answer here is no. However, in the Report Fonts area, you can experiment with using different fonts that would affect a wide range of reports and forms at one time. (There is no guarantee that a given font will work, so trial and error would be the method you'd use.) Any changes made have an effect only on the computer you're working from because the changes are in the C&P program installed on that computer.

Q. What's the difference between fields and files?

Your database is comprised of about 66 files. A file is information from a specific area of your database, e.g., jobs, costs, and staff. A file is comprised of many fields. As users enter data, they enter it into different fields in your database. Each field has a field name. So within the jobs file, you'll find fields named job number, job name, job start date, etc.

Q. Why does a pointer cursor sometimes turn into a padlock?

During data entry or saving, you'll sometimes see a padlock. It means that the same file is in use by some other user—whoever got it first. This is a natural feature of record-locking multi-user databases, and occurs to ensure that two people don't edit the same record at the same time. Padlocks disappear automatically as soon as the person who's editing the record saves it. Each user should know to never turn off a computer to break a padlock as this can damage the database. Padlocks can be canceled by pressing command-period (on a Mac) or control-break (on a PC) or wait for them to resolve which usually is a matter of seconds.

If a software bug could cause database damage, the damage would be consistent and occur frequently—which isn't the case. The usual causes of database damage include:

disk fragmentation on the server's hard drive, power surges, bad server hardware, poor LAN wiring and even excessive heat in the server room!

Q. Is bad data and damaged data the same thing?

No. Bad data, e.g., account balances that aren't correct, one-sided journal entries, billing amounts that don't add up, etc., happen because of posting problems and user mistakes, as well as system errors. Damaged data means the structure that holds the database's clients, jobs, costs, etc. is actually broken in some way. Bad data can be caused by damaged data, but not always.

Q. What is the database path?

The database path shows the location of the database on the file server or wherever it resides. A setting can be made in Agency Information to warn users if they open a database other than the one specified.

Q. Can a software bug cause database damage?

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GUARANTEED GREAT IDEAS!

System Management Tips from Real Clients & Profits Users

These Clients & Profits users share their system management tips:

Promote continuing education *"It's an important part of being a C&P system manager to keep my co-workers informed about Clients & Profits,"* says Angela Albanese of Bandy Carroll Hellige Advertising. *"I usually send e-mails once a month with tips and reminders about proper usage of C&P. I also usually forward any information, like FAQs, that I find on the C&P web site if it's relative to someone's job here."*

Install updates as they are released *"I am anxious to incorporate any new concepts to make the business run smoother,"* says Sue Augustine Bartholomew of Creative Concepts Inc. *"I install updates as soon as I am informed that there is a new one."*

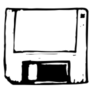
Upgrade your hardware and network periodically *"As your business grows, spend the money to upgrade your server and network,"* says Rebecca Cox, a Clients & Profits consultant. *"It's not like buying the latest fashion to look good. Periodically upgrade your equipment to maintain the overall health of your hardware and network. Improvements are made constantly and at some point, it's time to invest in those improvements. After all, how many of you are still using your 8-track?"*

Stay informed *"I use the Clients & Profits web site bi-weekly,"* says Jim Kennedy of Brokaw Inc. *"I want to keep up to date on patches and known issues. I also subscribe to all the C&P e-mail lists. I find those to be valuable sources of information; also the Helpdesk."*

Monitor the health of the database *"On a daily basis, our data's integrity is checked when someone with manager's level access, namely me, opens our database,"* says the Princess of Power, Deb Harrington of in10city. *"Then, I keep Clients & Profits open all day as I am office manager, receptionist, secretary, human resources, bookkeeper, payroll specialist, and C&P system manager. In my spare 27 seconds, I am the social director."*

BACKING UP SAVES LIVES

By Marty Pennoni



Back up your data daily! Backing up every night is not negotiable. It's not open for discussion. No whining, no complaining, no excuses. Just do it.

The first step to establishing a solid process is to identify the hardware/software solution you will use. This can range from manually writing your database to media such as CD/R or Zip to an automatic backup using tape, DAT, or ADR drives and programs such as Retrospect.

Next, assign a person to be responsible for implementation, and make it a top priority component of their job. Also assign a backup person who will take over if the responsible person can't perform their duties.

If your backup is stored on site, then take a weekly backup off site. For 18 years in multiple businesses, I always took a weekly backup off site in case of a disaster. I never needed to use it, but one of my competitors was fortunate to have been following the same procedure when his building burned to the ground.

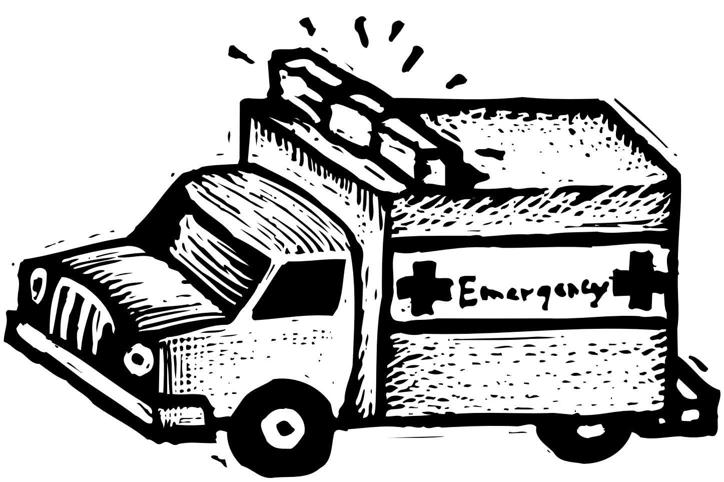
When I worked at an agency, our Clients & Profits database became corrupted late in the day. Because a nightly database backup was the highest of priorities, we simply copied the previous day's backup back onto the server, then recreated a day's worth of work.

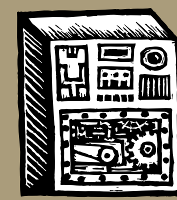
Had we backed up weekly, recreating data would have been a huge and costly problem. No backups would have been a disaster.

Periodically, it's a good idea to restore a backup and access it—just to be sure you, and someone else, know how to do it, if needed.

If as you read this you don't have a current backup, close everyone out of Clients & Profits, grab a CD burner, Zip, another computer or whatever, and copy your data. Then before day's end, establish a backing up routine and stick to it!

Marty Pennoni is a Clients & Profits consultant. He can be reached at mpennoni@ hotmail.com.





A C&P System Manager's Top 10 Bookmarks

1) **What's New in Clients & Profits-land** (www.clientsandprofits.com/whats_new) The best page for up-to-the-minute general news about Clients & Profits, including update announcements, new web pages, tips, and more. Updated every Monday.

2) **C&P System Manager News** (www.clientsandprofits.com/support/support/sys_mgr_news.html) The best source for up-to-date technical news about Clients & Profits.

3) **C&P FAQs/Tech Notes** (clientsandprofits.com/support/support/faq_tech_index.html) A great source for answers to commonly-asked questions about Clients & Profits, as well as inside information about how the system works.

4) **C&P Message Boards** (clientsandprofits.com/webx) You'll find a searchable archive of user group discussions here on just about every Clients & Profits-related (as well as agency management) topic.

5) **Macintouch** (www.macintouch.com) Cutting edge news and troubleshooting tips from thousands of Mac professionals.

6) **CNET** (www.cnet.com) An instant source for current technology news.

7) **Infoworld** (www.infoworld.com)

8) **MacFixIt** (www.macfixit.com) Mac troubleshooting by Ted Landau, the editor of "The Macintosh Bible" and author of "Sad Macs."

9) **PC World** (www.pcworld.com)

10) **Whatis** (whatis.techtarget.com) An "IT-specific encyclopedia" with over 3000 topics.

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working. And make sure someone else knows how to run, restore, and check the backup in case the system manager is unavailable. Drin Gyuk, systems administrator at Chicago-based Piper Studios, taped instructions on the backup hardware "so anyone could do it." They even chose a staff member to make backups just in case Drin isn't around.

Communicate with users

Until users get accustomed to contacting the system manager immediately if something unusual occurs, ask them each day. Keeping lines of communication open can help identify any potential problems before they become disasters.

But if something does go awry, it's always the users who discover it first. The sooner it's investigated, the sooner its true nature can be determined and the problems solved. It can be something as simple as a cable: "After having troubles for some time, we had our cabling tested and found some bad cables," says Jennifer Glick, director of operations at the Princeton-based Rainier Corp.

The C&P system manager is not just a techno-geek; there's also a human side to system management. "I'm involved with our users on a daily basis," says Jerry, Harvey & Daughters' CEO, "so I quickly know if something is wrong. For us, it's rarely a database issue; our system is pretty stable." He gets involved in training new employees to ensure that they know how to correctly use the software. "After all," he says, "using Clients & Profits well has been the key to our success."

B-E A-G-G-R-E-S-S-I-V-E

The best Clients & Profits system managers take an active role in managing the database. First, they learn as much as they can about the care and maintenance of the database, starting with the Clients & Profits Database Guide. It's an essential resource that includes troubleshooting and repair information, and identifies the common causes of data corruption. Second, check the "What's New" page on the Clients & Profits web site (*www.clientsandprofts/whats_new*) every Monday for news, tips, updates and other information. Third, sign up for the System Manager online user group (*www.clientsandprofits.com/support/user_group*) to exchange tips, solutions, and answers with other C&P system managers.

It takes a special person to be the C&P system manager, particularly when the responsibility is piled on top of other work. But if you break down the responsibilities into manageable tasks, the duty becomes less stressful—and gives you a chance to be the hero (cape not included).

Mindy Williams is a senior member of the Clients & Profits Helpdesk. She teaches the new-user training classes and edits the quarterly newsletters.

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*.

CLIENTS & PROFITS®
The Triangle Building
4755 Oceanside Blvd. Suite 200
Oceanside, CA 92056
(760) 945-4334

Attn: C&P System Manager

www.clientsandprofits.com