



## What's New

If April showers bring May flowers, what do Mayflowers bring? (*Pilgrims*). I love that one!

Welcome Spring! Longer days, flowers start blooming, and we can enjoy more outdoor activities. We held our multi-site Mid-Year State of the Company with all our teams. Our theme this year is Automate, then Grow. It's amazing to see the automation initiatives coming to fruition. Great job all the way around!

Many of us are traveling to industry events and educational events in the coming weeks. If you have a request or need to schedule a meeting, please contact Liz so she can make arrangements and reserve the time. - *Catherine Wendt*

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**April 2024**



# CHANGE MANAGEMENT

## Change Management: Planning AND Testing

As you can imagine, we see a LOT of change as part of our industry. And as we support our clients, we often have a front row seat as they roll out changes; some technology-related, some business-process related, some people-related.

As I put this together, it was just last year that we were sharing what's different in Windows 11, another important change. Tools we've used for years reach end-of-life. How we start our cars has changed. Even getting out of the limo, I had to figure out how to get the door open!

Over the last few months, we've seen a significant number of clients choosing various types of business change: moving to a new office or shutting one down; moving from an on-premise server to the cloud; moving from one cloud hosting platform to another; moving from server file shares to

SharePoint; integrating third party products that may or may not have integrations with existing software; moving to a new payroll platform or bringing payroll back in-house; Power BI reports available to the field from anywhere!

Most teams know the basics when it comes to thinking through the changes listed above. There's the logistics – installing software, choosing cut over or move dates, who's involved. There are vendor communications for changes/upgrades of services or purchase of goods. Then there are arrangements for training, having new procedures, and mocking up data. All of this while you're still getting your regular work done and holding down the fort.

We have a couple of other things we'd like to be sure are on your radar as you consider various changes in the

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coming months. Most of these are based on what we've seen as we roll out (or roll back) services, as well as the work we do with, and on behalf of, our clients.

Recently a client swapped out an old server. It was way past time to decide to replace the old equipment or move to the cloud. Even though we were part of the conversation leading up to the decision, we weren't told that a decision had been made. The next communication was a panic call — our FIT System would not work and it was a payroll day! Well, our FIT System talks to the Sage 100 Contractor data, and that data had been moved, but we didn't know it. This was very 'fixable' but with more communication and some testing of critical systems before going 'live,' we know the 'scare' would have been avoided.

Whether you're rolling out new software or new equipment, it's important to make a list, over a period of at least several weeks, of the various critical tasks, things that will have to 'work' when the project goes 'live.' This might be testing and plan-

ning for changes to the FIT System; this could be critical custom reports such as Cost to Complete, Over/Under Billing, Positive Pay, and similar. There might be Power BI connections to S100C and/or Excel data that will have a new 'home.'

When we are cutting a client over to our hosting environment, we actually test and train access to the new environment, invite users to log into their regular programs, and test access. Sometimes it's MFA adjustments, or other special routing needs. WAY better to get these tested before the cut-over day!

How about testing printing; logging into Sage 100 Contractor, licenses, and access (including the Database Admin tool). Launch SharePoint, and Microsoft tools. What about third party applications such as ProCore, Sage Paperless, FieldFlo, or other special tools you have in place.

Each project requires planning and training. We're suggesting that you also build in time and structure to test access and important routines to limit surprises and 'fires!' - CMW

## Cathy & Larry Sightings



Cathy, Matt, and Chris attended an industry event in TX. A short stop in IL and IN, then Cathy heads to Nashville for some marketing training! Chris and Cathy participated in a C12 Curriculum video shoot on AI (coming out in May).

Larry attended the Microsoft Fabric event in Vegas with AI Workshops (and cigars). Next stop is an AI two-day workshop in TX and Cathy will join for this one.

*"Progress is a nice word. But change is its motivator: And change has its enemies."*

— Robert F. Kennedy

### Leveling Up by Ryan Leak

I don't know if this is the right place to start (it's later in the book), but the 'Drop a Ball' section really caught my attention. When we juggle so many things, you can drop a ball. Mr. Leak suggests intentionally choosing which ball to set down before dropping any! Then the reminder: some balls don't bounce back. Are some of the things you're juggling made of glass and could break? Or could they become scuffed or damaged?

The Introduction starts with a question about what Level you're at in your life, work and personal (could be different). Level 1: Aimless; Level 2: Stuck; Level 3: Coasting; Level 4: Developing; Level 5: Thriving; Level 6: Mastery. He even has a



### Book Nook

Leveling UP Assessment at [ryanleak.com/levelingup](http://ryanleak.com/levelingup); might be worth checking out.

Then each of the 12 chapters has a topic and question followed by a recap and 'Do This Now' summary. The first question/chapter asks 'What is my definition of success?' Another chapter asks, 'How Can I Get Better?' This is an ongoing question at Syscon, across our teams.

All the chapters have great content, but another I'd highlight is The Integrity Question: What is the right thing to do? Sometimes our world suggests it's more about what we can get away with; Ryan has some great thoughts here.

As always, Ryan has some great stories to share. His enthusiasm and honesty shine throughout the book. Recommended! - CMW



## DNS Filtering—Great so Far!

In mid-2023, we rolled out DNS filtering to ourselves, then when we saw the results, to our clients. In our November 2023 newsletter, we shared a little about this service and what it does. It's officially part of our service offering to all our fully managed clients.

In summary Domain Name System (DNS) filtering blocks malicious, harmful, or forbidden websites and applications so they cannot be loaded or accessed. There are some deep filters and protocols available; quite powerful.

Dan shared some recent stats: In 24 hours, one day (!), DNS filter processed over 6.73 million DNS requests, blocked 577,000, and identified and blocked 8,300 threats, across 732 nodes that we protect.

At the recent industry conference we attended, we were very impressed with the performance so far, and very excited to see the road map for this service. A game-changer! - CMW

## Save Icon

It's a pretty universal image, but when you see the Save Icon, do you know what the image represents?

We remember when the 5.25" floppy drive was replaced by the 3.5" floppy disk (smaller, more sturdy); such a pain since



everything was saved on the larger, older disks, all our storage containers had to be swapped out, and newer computers couldn't run the old floppy drives. BUT, this is where all the data was saved! This is how we saved files.

All these years later, with no modern computer in site to run any of these disks, the Save Icon on many of our software programs, including S100C, is still the image of the 3.5" floppy drive. How many of our younger work force have never even seen one of these, but they still know what the icon means! - CMW

## Used/Old Computers

As clients swap out old hardware, we usually hear the same questions: what do I do with the old ones? I even found myself asking the same question a few weeks ago. We have two 'older' laptops that we would not assign to new team members, but they're just 'fine' and are great spares to have around, but it's unlikely we'll use them except in an emergency.

What if they could find a new home? After dealing with info on the hardware (top priority!) and cleaning them up, could they be given to a school, a trade school, or some other platform for others to learn computer skills? We're exploring this idea and would love to hear if this might be of interest to you, or you know a charity or education platform that could use donated computers.

If this is of interest to you, please reach out to Liz (phone or email CustomerSupport@syscon-inc.com) and let us know; thanks! - CMW

## Teams Phones (VoIP)

If you missed our Teams Phones (Teams Voice) webinar, we would be happy to send you a link to the recording. This service can meet the core needs and has enough flexibility to keep your field, remote workers, and office connected.

We've seen a renewed interest, and we use Teams Phones ourselves! Give Liz a call or email CustomerSupport@syscon-inc.com and we'll send it over right away. Great Q&A in this, as well! - CMW

## Shiny New Gadget Of The Month:



### Logitech Brio 500 Webcam

In the age of virtual communication, the Logitech Brio 500 Webcam stands out as a top-tier choice, delivering exceptional performance with its 4K Ultra HD resolution. This feature ensures that every detail is captured with precision, making it ideal for professional video conferences, virtual events, and more. The webcam's advanced optics and autofocus technology guarantee sharp images, adapting to various lighting conditions seamlessly.

Boasting a versatile 90-degree field of view, the Brio 500 provides a dynamic perspective, capturing more of your surroundings for a natural and immersive viewing experience. With a 5x digital zoom, users can focus on specific details without compromising image quality.

Concerned about privacy? Logitech has a built-in privacy shutter that physically covers the lens when not in use, ensuring peace of mind and preventing unintentional video streaming.

Compact in design, the webcam measures at a height of 1.24 inches, width of 4.33 inches, and depth of 1.24 inches. For added flexibility, users have the option to enhance their setup with a camera mount.

Priced at \$129.99, the Logitech Brio 500 offers outstanding value for its cutting-edge features and top-notch performance. Get them now at [www.logitech.com](http://www.logitech.com).



# CONSTRUCTION CORNER



## Import Credit Card – a Bug!

Several of our clients tie out the direct expenses on the Income statement with the Job Cost totals as part of their end-of-year process; kudos! We do this on behalf of some clients as we compile their extended WIP reports, too.

This year, we found, and a couple clients called with, situations where these numbers did NOT match, and we're not talking pennies! In digging a little deeper, we found a pattern – they were related to entries from the Credit Card Import and specifically, they were credits (negative costs).

When the records posted as a credit to the direct expense account, the job costs posted as a positive amount to the job, doubling the difference. When we shared this pattern with Sage, they tested it as well, agreed it could be replicated, and bumped it up to the programming team to fix on an upcoming release.

You might take this opportunity to tie out your direct expenses with job costs. There's a great report in 6-3-41 by posting period; check it out! - CMW

## Vendor Cert Warnings – a Bug!

I'm afraid we stumbled on another bug, as well. One of our clients was adding Certificates of Insurance in the 4-4 screen. They wanted the Warning (Yes) but did not need the Stop Pay flag. As they started the updates, I wanted to show them the warning they would receive when selecting invoices to pay – but the warning didn't come up!

In the past, as long as you had the Warning to 'Yes' and had expiration dates, you would see a list of vendors that had expiring Certificates of Insurance (or licenses, etc.) before seeing the grid to select invoices to pay. Now it only comes up if you have the Stop Pay as 'Yes.' BUT, there was still a box to check asking to receive the warning, so

this was very odd.

After a little back and forth with Sage, they were able to see that this was a previous feature and had somehow been lost. They said they would have it fixed with the Spring release – we're looking forward to it! -CMW

## A New Tab on the 3-5 Job Screen

With S100C version 25.3.x, you may have noticed an additional tab in the 3-5 job screen; Certified Payroll. It's not exactly what we expected, so we'd like to share what we know so far, and we'll continue to play with it and keep you updated.

It seems to be related to using the Aatrix Certified Payroll reports. This would be the 5-1-11 reports (rather than 5-1-6) which launch the Aatrix screens. These reports are more and more prevalent, and those requiring them have more and more criteria, making them more difficult to manage.

This additional tab is meant to track more details such as Project County, Federal Project#, State Project#, Type of Work descriptions; there are several date fields as well as Prime Contractor information. The goal is to have some of this flow through to the Aatrix reports, reducing the amount of edits and PDF's that are needed with each submission.

If you've decided to give these additional fields a try, we'd love to hear from you and hear what's working; thanks! -CMW

## User Defined Cost Types

It's been a while since we wrote about these, and recently, we had a few clients roll them out without fully understanding what would happen next. This is a nice option for some industries/clients, but it comes with the need for additional changes.

The default cost types are 1-Material, 2-Labor (W-2), 3-Equipment, 4-Subcontract,

**Save the Date**  
**Thursday, May 9th**  
**1:00 Central Time**  
**Updating Paygroups**  
**(Unions) Webinar**

and 5-Other. For over 90% of our clients, this is just right! And, the many (hundreds!) of S100C reports handle these cost types well and provide summarized and detailed nuggets.

Every now and then, using one of the User Defined Cost Types (6 through 9) that are available may provide an important adjunct to these initial five. HOWEVER, Cost Types 6 and higher are not in any of the default reports! When clients take this adventure on their own, the next call to us is that their Job cost totals don't match the Cost Types on the report – and they're right. Only Types 1 through 5 are in the default reports.

If you need/want/choose to add more Cost Types, consider beforehand which job cost reports you'll need and take the time to modify them to include the additional categories. There are space considerations, too, and we're happy to help! With a little planning, this kind of a roll out can be successful. – CMW

## See You There!

**May 18 - 22**

**Gaylord Texan Resort & Convention Center**

**CFMA's 2024 Annual Conference**

**(Cathy's leading a breakout session; come join us!)**

# M365 Education Station



Microsoft

Partner

## Microsoft Publisher—Going away...

### What is Microsoft Publisher and Why is it Ending?

Microsoft Publisher is a desktop publishing software that allows users to create various types of documents, such as flyers, newsletters, brochures, and invitations, as well as our newsletter! It is part of the Microsoft Office suite and has been available since 1991. Microsoft has announced that it will stop supporting Publisher after **October 2026**. This means that users will no longer receive security updates, bug fixes, or technical support for the software. Additionally, Publisher will not be compatible with newer versions of Windows or Office; no more support from Microsoft.

### What are the Implications of Publisher's End-of-Life?

If you are a current user of Publisher, you may be wondering what this means for your existing documents and projects. The good news is that you can still access and edit your Publisher files until the end-of-life date. However, Microsoft warns that you should be aware of the potential risks and limitations of using an outdated software. For example, there may be compatibility issues with other applications or devices, security vulnerabilities, or performance problems. You will not be able to create new documents or projects with Publisher after the end-of-life date. So it's time to start looking for alternative tools!



### What are Some Alternative Tools to Publisher?

There are several options available for desktop publishing software, both online and offline. Depending on your preferences, budget, and requirements, you can choose from a variety of tools that offer similar or better features than Publisher. Here are some of the most popular and recommended alternatives:

**Adobe InDesign:** This is a professional and powerful desktop publishing software that is widely used by designers, publishers, and marketers. It allows you to create stunning and sophisticated documents, such as magazines, books, posters, and flyers. It also integrates with other Adobe products, such as Photoshop and Illustrator, for seamless editing and design. However, InDesign is not very user-friendly for beginners and has a steep learning curve. It also requires a subscription fee, which can be expensive for some users.

**Canva:** This is an online graphic design platform that is easy to use and accessible from any device. It offers thousands of templates, fonts, icons, and images that you can customize and download for free. You can also upload your own photos and logos, or use the premium features for a small fee. You can create various types of documents, such as social media posts, flyers, newsletters, and invitations. However, Canva does not have as many advanced features as InDesign, such as layout grids, master pages, or typography controls. It also requires an internet connection and may not be suitable for offline or print projects.

**Scribus:** This is a free and open-source desktop publishing software that is compatible with Windows, Mac, and Linux. It offers many features that are similar to InDesign, such as layout grids, master pages, color management, and PDF export. You can create professional and high-quality documents, such as brochures, magazines, books, and posters. However, Scribus has a less intuitive and outdated interface, and may not have as many templates, fonts, or images as Canva. It also has a limited technical support and documentation, and may not be compatible with some file formats.

**Microsoft:** There were also references to using Word for simple documents and reports, as well as templates for newsletters. PowerPoint was also mentioned, highlighting features for animation, transitions, and multi-media. Microsoft Sway was also on the list to share interactive web pages, stories, and reports (a cloud-based service).

### Conclusion

Microsoft Publisher is a desktop publishing software that will stop being supported by Microsoft after October 2026. This means we have to look for alternative tools that can replace Publisher. Some of the most popular and recommended alternatives are Adobe InDesign, Canva, and Scribus, although based on the descriptions I've seen so far, I'm not really excited about what's out there. We've gathered this info from various online postings and using Copilot.— *CMW, Copilot*

## How Did They Do It? Shepherd Response

In a recent discussion with Syscon, John Bunting, Controller of Shepherd Response, shared key aspects of the company's journey and the challenges they've encountered in the realm of disaster relief.

His decision to join Shepherd Response was fueled by the excitement of contributing to a company in its early stages of growth. He emphasized the importance of blending technology and talent, stating, "We're successful because we leverage technology. But it's not just about the tools; it's about the people."

Managing rapid growth has been a challenge for the company, requiring strategic decision-making as they expand to multiple states. He acknowledged, "Rapid growth is exciting, but it's a double-edged sword. Without strategic decision-making, you can make costly mistakes. It's about growing wisely."

While he doesn't directly engage with customers, he highlighted the profound impact of Shepherd Response's work. "Building homes for people who've been displaced goes beyond construction. It's about transforming lives," he shared.

Syscon's communication efforts were commended by Bunting for their role in facilitating efficient operations. He emphasized the importance of quick responses in keeping their business moving forward.



**John Bunting,  
Controller**

As the Controller, his 23 years of accounting experience align with Shepherd Response's commitment to principles like work ethic and doing things right the first time. He concluded, "The partnership with Syscon has been crucial in moving the needle."

In essence, the conversation with John provides a glimpse into the passion and commitment behind Shepherd Response, where technology, talent, and a shared vision come together for impactful disaster relief. - RB

### Fast Facts

**Location:** Clayton, NC  
**Specialty:** Cleaning and Restoration  
**Founded:** 2020

[Read more at www.syscon-inc.com/how-did-they-do-it](http://www.syscon-inc.com/how-did-they-do-it)

**Are you interested in having your story featured? Let's talk!**

## Upcoming Events

**Event:** The POWER of Power BI, webinar

**Date:** Thursday, April 11th

**Time:** 11:00 a.m. CST

**Register:** [www.syscon-inc.com/events](http://www.syscon-inc.com/events)

**Event:** Ditch Paper Timecards, webinar

**Date:** Thursday, April 18th

**Time:** 11:00 a.m. CST

**Register:** [www.syscon-inc.com/events](http://www.syscon-inc.com/events)

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 We are committed to helping businesses use technology to run their organization successfully and profitably.

This monthly publication provided courtesy of Catherine Wendt, President of Syscon Inc.

