

# HOLIDAY CHECKLIST

DEC 2008



## TOP TIPS

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This checklist below should give you a quick guide to ensure you have your SAP System and Support sorted for while you are on holiday, or general Business Evolution Christmas closedown.

### Within SAP Business One

- Set in place a Change Freeze**—no new setup, no attempts at changing configuration, no changes to print layouts, no new User Fields etc. This is where a lot of whoops type mistakes occur and urgent/costly support is required. Even if you are reasonably confident about making the change, we strongly recommend you DONT attempt it over the Business Evolution Christmas Closedown period. This does not include Master Data like, Business Partners, Items or general day to day transactions.
- Foreign Currency Rates Set for the Period**—If you are using ANY foreign currencies, you need to set rates in your system for the period before anyone can create any Marketing Documents (AR/AP). This is necessary whether they are transacting in your local currency (eg. NZD) or a foreign currency. These can be set in advance and in bulk for a month at a time.  
**Navigate to:** Administration > Exchange Rates & Indexes
- New Period or Financial Year is Setup**—if your company Year End (eg. 31 Dec) is going to occur while you are away, ensure your NEW financial year is setup in advance. If it is setup already, SAP will automatically allow users to post their transactions to the new period. If it is not setup, no transactions can be posted to the new period, and only users with correct authorisations can post to Closing (previous) periods. Contact us in advance to set these up if you are not 100% clear what to do.  
**Navigate to:** Administration > System Initialisation > Posting Periods or >General Settings in 2005A
- New Users/Sales Employees/Licenses Setup**—Any new User or Sales Employee has been setup, authorisations set and an SAP license assigned where appropriate. Ensure someone is there to train them too!

### Backups & Disaster Recovery

- Daily Backups**—check these are actually working! We have had several customers think their backups are fine when they haven't been. This is particularly an issue when whole server backups are done and SQL is done as part of that. It's a simple check, get us to restore one over your SAP Test system.
- Take Backup's Off Site**—If your premises burnt down, or was flooded or your server was stolen, what are your options? Make sure you have a process in place where someone is physically taking a backup off site on a regular basis. You can also automate this by shipping backups to other branch's servers or internet backup storage sites overnight.
- Check your Disk Space**—Often backup programs rely on someone taking a tape out, or something similar. Depending on your SQL setup and transaction volumes while away, the SQL Server disk space may grow significantly and there may not be enough disk space on your server to deal with this. SAP will stop working as it cannot save any data.
- Communicate who Person in Charge is**—if you wont be there make sure you have nominated another team member and communicate this to all of your users, and to [Support@BusinessEvolution.co.nz](mailto:Support@BusinessEvolution.co.nz) . They must have the contact details for us, know where your server is (so they can restart it if required) and maybe they have your contact details too!

### Some Simple Non-Technical Troubleshooting Tips

- One User has a Problem**—Log off SAP and log on again. If this doesn't resolve their issue get them to restart their PC.
- All Users doing Different Things have a Problem**—Get everyone to log off SAP, log one user back on and check if the issue has been resolved. If not, restart your server.
- All Users doing the Same Thing have a Problem**—For example, everyone who prints invoices is getting a funny looking document. Chances are someone has changed some configuration or not set something up (eg. Financial Periods). Contact your Internal Support Person in Charge, and they can escalate to us if assistance is required.
- Shut Down PCs not in Use and Restart PCs on a Regular Basis**—This is needed on most Windows operating systems. Your whole PC will begin to slow down and different errors may occur. The simple process of shutting down your PC at the end of the day is ideal.

Log any issues via [Support@BusinessEvolution.co.nz](mailto:Support@BusinessEvolution.co.nz) or Contact : [www.BusinessEvolution.co.nz](http://www.BusinessEvolution.co.nz)