

Sage 100

Modernization Assessment

Every organization wants the same things from its Sage 100 environment: **secure access, consistent performance, resilient operations**, and **room to grow** without adding complexity for IT. This assessment helps you see where you stand today and prioritize what matters most.

Left unaddressed, these gaps show up as **lost productivity, security risk**, and **unplanned downtime**. Work through each section, then use the **risk snapshot** at the end to see where to focus first.



SECTION 01

User Access

Employees expect to work wherever business takes them. Inconsistent or insecure access means more support tickets and more risk. The goal: a secure, consistent experience across office, remote, and travel.

ASSESSMENT	YES	NO	UNSURE
Users can securely access Sage from any approved location.	☐	☐	☐
MFA is enabled for all users.	☐	☐	☐
User permissions are reviewed regularly.	☐	☐	☐
Remote users have the same experience as office users.	☐	☐	☐

BUSINESS IMPACT: Higher productivity · Fewer support tickets · Better security



SECTION 02

Application Health

Many "Sage issues" actually start with integrations, reporting tools, printers, or licensing. The goal: every critical application and workflow validated and performing reliably.

ASSESSMENT	YES	NO	UNSURE
Sage version is current and supported.	☐	☐	☐
All third-party integrations are documented.	☐	☐	☐
Printing and scanning workflows are verified.	☐	☐	☐
Microsoft 365 integrations work reliably.	☐	☐	☐
Reporting tools have been validated.	☐	☐	☐

BUSINESS IMPACT: Faster issue resolution · More reliable operations · Less downtime



SECTION 03

Security

Modern cybersecurity depends on layered controls: identity, monitoring, patching, and clear policies working together. The goal: data protected without slowing employees down.

ASSESSMENT	YES	NO	UNSURE
Endpoint protection is managed.	☐	☐	☐
Patch management follows a schedule.	☐	☐	☐
Administrative accounts are limited.	☐	☐	☐
Monitoring and alerting are in place.	☐	☐	☐
AI usage policies exist for employees.	☐	☐	☐

BUSINESS IMPACT: Reduced cyber risk · Improved compliance · Greater customer trust



SECTION 04

Backup & Recovery

Backups create the recoverable copies your business needs, but recovery speed depends on tested, documented procedures. The goal: critical systems restored quickly, with clear ownership if something goes wrong.

ASSESSMENT	YES	NO	UNSURE
Backups are tested regularly.	☐	☐	☐
Recovery objectives are documented.	☐	☐	☐
Disaster recovery responsibilities are defined.	☐	☐	☐
Critical systems have documented recovery procedures.	☐	☐	☐

BUSINESS IMPACT: Minimized downtime · Business continuity · Greater operational resilience



SECTION 05

Operations

Successful environments have clear ownership: who manages infrastructure, security, updates, and support. The goal: responsibilities documented and shared clearly between internal IT and technology partners.

ASSESSMENT	YES	NO	UNSURE
Ownership is clearly defined between internal IT, and hosting provider.	☐	☐	☐
User onboarding/offboarding is standardized.	☐	☐	☐
New software is validated before deployment.	☐	☐	☐
Performance issues are tracked and reviewed.	☐	☐	☐

BUSINESS IMPACT: Faster issue resolution · Fewer surprises · Easier long-term management



SECTION 06

Business Risk Snapshot

Rate the business risk each area currently carries.

AREA	LOW	MEDIUM	HIGH
User Access	☐	☐	☐
Application Health	☐	☐	☐
Security	☐	☐	☐
Backup & Recovery	☐	☐	☐
Operations	☐	☐	☐

A few questions worth sitting with:

- 01 What is your **biggest operational challenge** today?
- 02 If you could eliminate **one recurring IT headache**, what would it be?
- 03 Which **modernization initiative** would have the **greatest impact on your business** over the next 12 months?

NEXT STEPS

Ready to talk it through?

Summit can run an environment and modernization assessment tailored to your organization.

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