



## 2010 Conference OSAS Sessions

» **Document Management: Go Paperless\*\***

This class will cover the email setup in OSAS setup and along with all of the new features for managing document delivery.

» **OSAS 7.6 Security: Period Locking, Roles, and More\*\***

Learn about the new and improved security features available in OSAS 7.6. We will also cover the process of setting up security for a sample company including the new Roles feature.

» **Imports: Payroll and GL Data Transfer Without Tears\*\***

Want to save time and energy and reduce the manual entry in Payroll and General Ledger? This class will cover the setup and importing of files containing General Ledger and Payroll transactions directly into OSAS.

» **Personalizing OSAS 7.6: Make it Faster, Make it Yours\*\***

This class will go through the new options for OSAS 7.6 (along with existing options) that allow users to personalize their interaction with OSAS. Preferences, favorites menu, and quick entry are only a few of the many features the class will cover.

» **OSAS General Ledger Financial Statements: Striking the Right Balance (Sheet) \*\***

This class demonstrates the basic setup of financial statements within OSAS General Ledger. It covers both the statement layout and content functions, as well as how to use them to create a balance sheet and income statement.

» **OSAS General Ledger: Reconciling Subledgers Without Going Off the Deep End\*\***

Want to know how to deal with some common issues when trying to reconcile your GL subledgers for AP/PO, AR/SO, and Inventory to General Ledger? This class is for you!

» **OSAS Banking: Bank Management Made Easy\*\***

Get a look at the features in the OSAS Banking application that can help you be more efficient, such as recurring cash receipts, file import, and automatic bank reconciliation. We will also be covering positive pay setup for Payroll and Accounts Payable to help protect your bank account.

» **OSAS with Excel Using the BBJ ODBC Driver: Excel-erate Your Data\*\***

Have you ever wanted to get your OSAS data into Microsoft Excel? This class will walk step-by-step through the process of setting up the BBJ ODBC driver to link your OSAS data into Excel.

» **OSAS 7.6 Enhancements: More Than Just an Upgrade\*\***

This class will cover wide array of enhancements to OSAS 7.6, such as the enhanced transaction inquiry, the saving of report selections, picking non-continuous selections on a report, locking General Ledger periods, and many more. If you haven't had a chance to check out OSAS 7.6, don't miss this!

» **OSAS Sales Order Transactions: Simplified Orders and Returns\*\***

Learn all about the timesaving Sales Order Transactions options, including the new Return Merchandise Authorization functions.

» **OSAS Info-Alert**

Want to find out how OSAS Info-Alert can benefit your company? Already have OSAS Info-Alert, but not sure how to get started? This class will cover the setup and get you on your way. We'll also show you how to get maximum bang for your buck and how to use the more advanced features available in Info-Alert.

» **Upgrading to OSAS 7.6**

This class explains the process for upgrading to OSAS 7.6 and the installation options available.

» **TRAVERSE for the OSAS User**

If you are an OSAS user, but wonder about how TRAVERSE can help your organization, plan to attend this breakout session. We'll show you the differences between the two, as well as many of the advanced TRAVERSE features to help you be more efficient and productive in your work.

» **OSAS Inventory Management Tools**

Discover all of the tools available in OSAS to help control and manage your inventory. Included in the training will be reorder processing, inventory transactions, physical inventory, and all of the associated reports.

## General Sessions

**Oh!No! Series** has been REVISED and UPDATED. These interactive sessions present real-world accounting and processing situations in a small working group format. The sessions are not exclusive to OSAS or TRAVERSE but present solutions for the processes using either. All scenarios and resolutions discussed in class are available to class participants as handouts.

» **Oh!No! Accounts Payable and Accounts Receivable\*\***

This two-hour session presents real-world situations from Accounts Payable, Accounts Receivable, Purchase Order and Sales Order. Small working groups will interact to discuss situations and review them with the class. The presenters will provide guidance to the groups and offer additional solutions not arrived at in class. Take this opportunity to work with others to solve these scenarios.

**2 hour session – Kathy Walsh and Howard Holz**

## **Oh!No! Payroll\*\***

This one-hour session presents real-world situations involving Payroll and Tax Reporting. Small working groups will interact to discuss situations and review them with the full class. The presenters will provide guidance to the groups and offer additional solutions not arrived at in class. *The impact of new regulations will be included in the discussions.*

### **1 hour session – Kathy Walsh and Howard Holz**

#### » **Oh!No! Open Forum\*\***

This one-hour session is designed to let you ask any questions related specifically to the applications you use within your business. This was a new session last year with great participation. Bring your questions with you or submit them ahead of time by sending them to [CarlaA@osas.com](mailto:CarlaA@osas.com) including the system (TRAVERSE or OSAS), the application and the question or process for discussion. The presenters will use these submissions to generate discussion and provide suggestions for resolution. Questions from any TRAVERSE or OSAS applications are encouraged.

### **1 hour session – Kathy Walsh and Howard Holz**

#### » **Using the Internet to Help Market Your Business**

What the heck is all this business about social media? Why do I keep getting invitations to join people on social sites? What makes sense for your business and what is fun for your personal life? Let's take a look at what you can use to help you market your business, connect with prospects, help other business, let other businesses help you, open doors to prospects, and keep you from making a cold call.

#### » **OSAS Bank Reconciliation: When Imbalances Attack\*\***

This session will cover the features and functions available in Bank Reconciliation. We will also be looking at the most common issues when the system is out of balance, and provide recommendations for correcting them.

#### » **OSAS CJC: Payroll Reports In-Depth\*\***

This class will provide a better understanding of the influences your Contractors' Payroll setup has on CJC payroll reporting. Concentration will center around a review of the Worker's Compensation, the Union, the Labor Burden, and Certified Payroll reports and the information they display.

#### » **Auditing Your Reports**

Learn how to use TRAVESE for audits from internal to bank all the way to government.

#### » **Business Processing**

There is no better way to achieve additional benefits out of your system than to review and change business processes when and where necessary. This breakout covers the reasons, steps, and examples to illustrate how you can put this concept into action for your organization.

## Partner Sessions

### » Document Management Solutions with UnForm©

In this session get an overview of UnForm, SDSI's most popular software product. Learn how you can seamlessly integrate UnForm® with your application for document production, delivery, archiving and scanning for both OSAS and Traverse.

This technology offers the capability to automate the archiving of documents at the time documents are printed based on your archive criteria. Document retrieval is web browser based so there is no additional software to install on workstations. The document scanning software automates the process of scanning documents and storing them with previously archived documents. New with UnForm v8.0, see the Application Integration component for customizing document retrieval direct from your Open Systems application screens.

### » VoIP and IP Telephony Update and Integration with OSAS and TRAVERSE

Please join FacetCorp, Response Computer Group and Alternative Business Systems for an enlightening session on VoIP, IP Telephony and FacetPhone. You will see the resulting power of integrating an Open Systems based application with the phone system, and the compelling return on investment that goes way beyond simply saving money on long distance charges.

FacetPhone is a state-of-the-art IP-PBX VoIP telephone system that is "IP From the Ground Up." Application integration has already been developed for OSAS and TRAVERSE environments which results in an amazing ROI for businesses. Here are some of the things that will be shown in this session:

- New cost saving dial tone and phone service options, including SIP trunks and Skype
- Presence Management & Call Control with FacetPhone Graphical User Interface
- Visual Voice Mail with Unified Messaging and an Array of Delivery Options
- Integration examples with OSAS and TRAVERSE – dialing, screen pops, etc.
- Departmental "Call Center" Functionality
- Enterprise Instant Messaging
- Call Recording and Monitoring
- Seamless Branch Office and Teleworker Integration
- Powerful and Flexible IVR system
- Built-in Conferencing and Conference Bridging

FacetCorp is the developer and manufacturer of innovative telephone systems and IP networking products. FacetPhone is a VoIP IP-PBX telephone system. FacetWin and FacetTerm are powerful networking, terminal emulation, and productivity products used worldwide by over a million people.

**1 hour session - Presented by FacetCorp**

» **Document Management for TRAVERSE & OSAS with DocUnity**

Work leaner and greener by eliminating the unproductive and repetitive tasks associated with handling paper documents. Hours each day are wasted each day filing, copying, printing and manually collaborating using paper documents. DocUnity can streamline your organization by eliminating these wasteful tasks and significantly increase employee productivity.

DocUnity is seamlessly integrated with both the TRAVERSE and OSAS product line. The integrated approach allows you to immediately process and retrieve documents from your Open Systems software and then instantly deliver the documents and information to employees, customers and suppliers.

Discover through our product demonstration docUnity's deep integration with TRAVERSE & OSAS as well as additional features and benefits.

We will also provide each session attendee an ROI calculation tool that will step you through the process of determining what the ROI for your business is using your business processes, documents and transactional volumes.

**1 hour session - Presented by docUnity**

» **BizInsight - Excel® Business Information Suite**

The BizNet™ product suite is a business reporting and analytics platform that provides real-time access to your business data from Microsoft® Office Excel®. It delivers simple, yet powerful capabilities to anyone who uses spreadsheets to gather and analyze business information. It also gives you the ability to create a single Excel® template for multiple report generation. The BizNet™ product suite empowers end users with the ability to get immediate answers to questions without the usual challenges of gathering and refreshing the source data.

**1 hour session - Presented by BizNet**

» **BASIS and Cloud Computing**

Virtual Development and Deployment considerations for the Open Systems community. Through the case study of BASIS' International's move to the cloud, learn about the benefits and be warned of the pitfalls before you take the plunge into the latest trend in computing.

**1 hour session – Presented by BASIS**

» **Adding Web Expertise to your Open Systems Platform**

As an industry leader in website design and development, Americaneagle.com will discuss how you can leverage a Web developer's experience for your own Website. The session will feature a case study analysis of various site designs and the successes they have seen. The session will also highlight several of the newest and most successful website technologies and how they can be valuable to you.

**1 hour session – Presented by American Eagle**

» **Payment Processing with X-Charge**

X-Charge's integrated solution streamlines payment processing needs within the Open Systems software, and our reputation means you can be sure you are processing payments through a secure and reliable system. Besides providing a simple way of processing credit and debit cards, this integrated solution can help accelerate the accounts receivable process through our check verification and guarantee service, all processed and managed electronically and in real time.

**1 hour session – Accelerated Payment Technologies**

*Classes will be taught on OSAS 7.6 but concepts apply for 7.5*

\*\* Continuing Professional Education (CPE) credits are offered in accordance with nationally recognized standards by the National Association of State Boards of Accountancy (NASBA). Attendees earn one CPE credit per hour of training completed.