



2010 Conference TRAVERSE Sessions

» **Navigation: Make it Faster, Make it Yours****

Learn about TRAVERSE 11's new navigation and personalization options, along with some tips and tricks to increase your efficiency.

» **AR, AP, and GL: Managing Cash Flow****

Learn advanced techniques to manage AR, AP, and GL in TRAVERSE. This class is not a feature overview: we will discuss how and why to take advantage of the features provided by Accounts Receivable, Account Payable, and General Ledger to help you direct your cash flow. This intermediate class will be most useful to participants with a working understanding of those applications.

» **Going Green with TRAVERSE 11: Paperless and Loving It****

Help save the environment and save money by learning use TRAVERSE without printing to paper. Learn how to save and email reports and forms to customers, vendors, and employees—all without leaving TRAVERSE!

» **TRAVERSE 11 Design Studio For Beginners: Cracking Open the Toolbox****

Want to track more information about a customer, vendor, or item id? This class will walk you through the process of creating user defined fields and adding to the setup and maintenance screens for the application.

» **Server Manager and Security: For Administrators Only****

Learn about the functions available in Server Manager such as backing up, loading updates, and the setup of security.

» **GL Financial Statements: Balancing Act Made Easy****

Learn the basic setup for both the GL Management Report Layout and Content to create a balance sheet and income statement financial reports. Included in the class will be some tips for making this process easier.

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

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

» **Payment Method Setup and Cash Receipts Processing: Checks and Credit and Cash, Oh My! ****

This class will walk you from the setup of the different customer payment methods through the processing and application of payments against invoices.

» **Productivity Reports: Excel-erate Your Data ****

In this session we will cover the steps necessary to link your TRAVERSE data into Excel with the Productivity Reports. Next, we will show you some options for customizing these pivot tables in Excel. The class will finish with explaining how you can create your own reports (and pivot tables), and add them to the TRAVERSE menu.

» **TRAVERSE Info-Alert**

Want to find out how TRAVERSE Info-Alert can benefit your company? Already have TRAVERSE 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.

» **TRAVERSE 11 Not For Profit**

This class provides a "how to" guide to setting up the functions designed specifically for the NFP community. In this session you will learn how to: track restricted, temporarily restricted, and unrestricted funds; create automatic due to/due from entries; create cross fiscal year financial and grant reports; prepare FASB 117 report information and other NFP required reports; and create allocation entries for Accounts Payable, General Ledger, and Payroll.

» **TRAVERSE 11 Road Map**

The version 11 rollout is well under way... but what's next? This session will provide insight into the new features, functionality, and applications planned for future releases of TRAVERSE.

» **TRAVERSE Inventory Management Tools**

Discover all of the tools available in TRAVERSE 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.

» **TRAVERSE 11 Manufacturing**

Same reliable functionality with new and exciting tools... come see what is coming with TRAVERSE 11 Manufacturing!

» **TRAVERSE 10.5 Process Manufacturing**

Introduction to the world of Process Manufacturing and the software that meets the unique needs of that industry.

» **TRAVERSE 11 Interactive Views**

Find and share information faster than ever before! This class covers the three different types of interactive views available and how to get the most from them.

» **Maximizing TRAVERSE 10.5 Manufacturing Process**

This class reviews the entire manufacturing process with an emphasis on planning and MRP reporting. We will also discuss some of the more underused functions of TRAVERSE Manufacturing such as the Bill of Material Import function, the Dispatching function, and the Resource Availability Report.

» **Why TRAVERSE 11?**

Learn the benefits and features available in TRAVERSE 11, and the reasons why you should move to this exciting new solution.

» **TRAVERSE 11 Payroll Processing**

The new version of TRAVERSE Payroll processing has arrived! This class covers the processing of payroll in TRAVERSE 11.

» **TRAVERSE 11 Reporting Overview**

This class covers the reporting functions available in TRAVERSE 11, such as the standard TRAVERSE reports, interactive views, and SQL reporting services. We will also review other available reporting products available such as Info-Alert, Syntopics, and Biz Net.

» **TRAVERSE 11 Project Costing Processing**

TRAVERSE 11 Project Costing is here! This class covers the new steps for processing transactions, billings, and adjustments to a project.

» **Extending ERP Software Via Mobile Devices**

Apple, Android and others have changed the mobile device landscape. This session is an overview of the technologies required to extend your ERP solutions to the latest generation of mobile devices. Sample applications will be shown on Apple, Android and Windows Phone 7 platforms. While the development platforms for these environments will be discussed, this is not a detailed programming class. However, the code projects for the sample applications will be made available for session attendees. Surveys will be handed out to determine interest in the various platforms and application solutions to help Open Systems plan for future hands-on courses.

» **Basic Scripting in Design Studio**

This class will guide you through a several simple examples of customization done with Iron Python Scripting in Design Studio.

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.

» **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**

» **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 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**

» **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.

» **Auditing Your Reports**

Learn how to use your software 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.

1 hour session - Presented by SDSI

» **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 you business is using your business processes, documents and transactional volumes.

1 hour session - Presented by docUnity

» **Reporting Made Easy with Synoptix for TRAVERSE**

Join us for an overview of how easy it is to create powerful dashboards, as well as financial & business intelligence reports from anywhere within your TRAVERSE database. You will also discover Synoptix' incredible new capabilities, including it's built-in ad hoc reporter which allows you to quickly build reports with simple drag & drop procedures for fast analysis. In addition, you'll find out more about Synoptix' new scheduling capabilities & brand new Data Spheres - all designed to empower you with an important competing edge in an ever changing corporate environment.

1 hour session - Presented by Synoptix

» **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 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

Classes will be taught on TRAVERSE v11 but concepts apply for 10.5

** 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.