



## CONFERENCE SESSIONS

**Learn How to Create Your Individual Plan for Upgrading to TRAVERSE 11** - Get an outlined plan of the steps and information required to update to TRAVERSE version 11. **1 hour session**

**Are You Taking Advantage of Maintenance?** - Get the full benefits from your software maintenance. We'll discuss options for training, support, fulfillment, and the use of the customer information portal. **1 hour session**

**TRAVERSE Business Intelligence Overview** - What is Business Intelligence and what can these tools do to make your job easier? In this class we will present real customer examples and open your eyes to the possibilities the tools can deliver. **1 hour session**

**TRAVERSE Info-Alert Setup and Functioning** - Want to use TRAVERSE Info-Alert, but not sure how to get started? This class will cover the setup and get you on your way. It will also show you how to get maximum bang for your buck and how to use the more advanced features. **2 hour session**

**OSAS Info-Alert Setup and Functioning** - Want to use OSAS Info-Alert, but not sure how to get started? This class will cover the setup and get you on your way. It will also show you how to get maximum bang for your buck and how to use the more advanced features. **2 hour session**

**Oh! No! Accounts Receivable and Accounts Payable** - This two-hour interactive session presents real-life situations for discussion in small working groups. We will then review them together. The presenters guide the groups and share the methods they use with clients. Covers situations including Accounts Payable, Accounts Receivable, Purchase Order and Sales Order. Working groups will be formed based on participant's applications. Differences between OSAS and TRAVERSE will be explained as needed. **2 hour session**

**Oh! No! Payroll** - This one-hour interactive session presents real-life situations for discussion in small working groups. We will review together. The situations are based on real life examples. The presenters guide the groups and share the methods they use with clients. Differences between OSAS and TRAVERSE will be explained as needed. **1 hour session**

**Oh! No! and Oh! Yes! Open Forum** - This one-hour interactive session is an open forum in which you can ask the presenters questions about your accounting applications. The Oh! No! Educational Series was introduced several years ago as a problem-solving process. An Oh! Yes! Educational Series was introduced at last year's user conference to help participants in the planning and setup of their applications with the hope of avoiding Oh! No!'s. You are encouraged to bring questions from your own operations. The presenters will guide you through the session to arrive at the best solution. Questions from all OSAS and TRAVERSE applications are encouraged. **1 hour session**

**Navigating OSAS Like a Pro** - We want you to be more productive and use OSAS the way it was designed: to make your job easier. Attend this session to learn about shortcuts and settings that help you use OSAS more efficiently and effectively. **1 hour session**

**Reporting Made Easy with Synoptix for TRAVERSE** - This session will show you just how easy it is to create financial and business intelligence reports from anywhere in the TRAVERSE database with Synoptix. You will see how you can easily create powerful, interactive dashboards to show a snapshot of your business performance. You'll also discover how Synoptix makes the hassles of multi-company consolidations a thing of the past with its advanced consolidation and inter-company elimination functionality. **1 hour session – Presented by Synoptix**

**OSAS User Defined Fields** - Learn how to set up and take advantage of the user-defined fields in Accounts Payable/Purchase Order, Accounts Receivable/Sales Order, Payroll, and Inventory. This information allows you to capture customized information for your company. **1 hour session**

**OSAS BBJ Enterprise Manager** - We'll cover some of the administrative functions in Enterprise Manager for BBJ installations of OSAS, including the ability to see all of the open files, current users, and database permissions. **1 hour session**

**OSAS Common Issues in Reconciling Sub-Ledgers** - We'll take a look at some of the common issues users run into when reconciling Accounts Payable/Purchase Order, Accounts Receivable/Sales Order, and Inventory to General Ledger. **2 hour session**

**OSAS File Layouts - How to Find Your OSAS Data for Reports** - Are you looking to write your own reports in OSAS? This session will show you where to find your stored information. **1 hour session**

**OSAS GL - Transactions, Recurring Transactions, Inquiry and Reports** - This class will cover the transaction entry option directly into General Ledger as well as some of the inquiry options. **1 hour session**

**OSAS GL Financials Statements** - Are you intimidated about creating your own financial statements? Relax. If you have a basic understanding of OSAS General Ledger, this class will give you the confidence and direction to create reports for your boss, banker, CFO and others on your own! **2 hour session**

**OSAS Banking** - Get a look at the features in the new OSAS 7.5 Banking application, including credit card authorizations, recurring cash receipts, and positive pay as well as file import and automatic reconciliation in Bank Reconciliation. **2 hour session**

**OSAS 7.5 Email Enhancement** - Reports and Forms (BBj and BBx). Did you know you can use OSAS to distribute forms and reports by email? Learn how to set this up. We'll also discuss the new plain-paper invoices, statements, purchase orders, and voucher forms available in OSAS on BBJ. **1 hour session**

**OSAS 7.5 - Methods of Payment for AP/PO** - See how to set up and use the new multiple Methods of Payment enhancement in OSAS v7.5 Accounts Payable and Purchase Order, including how to pay your vendor invoices by credit card. **1 hour session**

**OSAS and Excel - Using the BBJ ODBC Driver to Connect Your OSAS Data to Excel** - We will explain the steps needed to link OSAS data to Excel. Covers the setup of databases in Enterprise Manager, creating a DSN in Windows, and creating a spreadsheet from OSAS data in Excel. The class will also cover more advanced options that are available for security and adding custom reports to the menu. **2 hour session**

**OSAS 7.6 Features Sneak Preview** - Want to be "in the know"? This is the place to be if you want to get a first look at some of the new features in OSAS 7.6. **1 hour session**

**BASIS iReports** - Learn to efficiently deliver professional looking reports from programs written in BBx®, the language you already know. Discover how to use BASIS' unique stored procedure technology to access normalized or non-normalized data with any report writing tool. BASIS demonstrates the open source iReport designer with BBJasper to provide you with sample code and the knowledge to start writing your own professional looking reports. See how you can view, fax, e-mail and produce multiple output report formats easily and completely from within your OSAS application and—best of all—without incurring any third party software costs. **2 hour session – Presented by BASIS**

#### **OSAS Tools to Streamline Your Business**

Be sure to attend our breakout session to learn how our RCG product line for OSAS will save you time and money!

We will cover the following products:

- Integrated Credit Card Processing – now even easier with PPI PayMover!
- eForms (email/fax/routing/archive)
- Ship Track (UPS & FedEx integration)
- Wireless Handheld (pick orders, receive goods, physical count, and item transfer)
- eBusiness (B2C, B2B, Sales Rep)
- Order Management (Point of Sale/Distribution)
- Work Order/Field Service

#### **1 hour session - Presented by Response Computer Group**

**TRAVERSE 11: The Next Generation of Business Management Software** - Whether you currently use OSAS or TRAVERSE, you'll want to attend this session to see the exciting ways that the next generation of software can help you. We've built on the great feature sets of OSAS and TRAVERSE and added new layers of adaptability that let you adjust the software to meet your business needs. And, you can keep current with service packs and new features even if you have adapted the software - no more lock-ins because your software is customized! **2 hour session**

**TRAVERSE Product Roadmap** - 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. **1 hour session**

**TRAVERSE Imports and Exports** - Explore and understand the old and new TRAVERSE Imports and Exports features in each application. This class will cover the functional setup and processing of these imports. **2 hour session**

**Using Queries in TRAVERSE** - We'll show you how to troubleshoot TRAVERSE data using both Access and SQL and we'll give you some behind-the-scenes pointers. This is not a programming level class, but is recommended for people doing TRAVERSE support or working with SQL. **1 hour session**

**Common Issues Reconciling TRAVERSE Sub Ledgers** - We'll take a look at some of the common issues users run into when reconciling Accounts Payable/Purchase Order, Accounts Receivable/Sales Order, and Inventory to General Ledger. **1 hour session**

**Using Excel and PivotTables to Access TRAVERSE Information** - This session 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 PivotTables in Excel. The class will finish with explaining how you can create your own reports (and PivotTables) and add them to the TRAVERSE menu. **2 hour session**

**TRAVERSE 11 Server Manager and Security** - Do you understand menu permissions for TRAVERSE? We'll show you how to set menu permissions for groups and other database administrative features of Server Manager. **1 hour session**

**TRAVERSE Table Layouts** - Finding out where information displayed in TRAVERSE is stored is essential for custom reporting and querying. This is a great class for users looking to write their own reports from their TRAVERSE data or do queries. **1 hour session**

**TRAVERSE Banking** - This class will cover the basic setup for the TRAVERSE Banking application, including the new method of payments for Accounts Payable and Accounts Receivable. The class will also cover the setup and function of the imports and exports in Banking from Positive Pay files and Reconciliation Import. **1 hour session**

**TRAVERSE GL Transactions, Recurring Transactions, Inquiry and Reports** - If you are doing the same General Ledger journal entries day-to-day or month-to-month, you can use recurring entry transaction processing. Learn how they are used and generated. This is a great time saver! **1 hour session**

**TRAVERSE Budgeting** - Why do you continue to remove the column on the financial statements for budget comparisons? It is very easy to create multiple custom budgets from prior year figures, export to MS Excel for editing, and import back to General Ledger with our TRAVERSE 10.5 enhancement. Join us and see how this is done. **1 hour session**

**TRAVERSE Financial Statements** - Are you intimidated about creating your own financial statements? Relax. If you have a basic understanding of TRAVERSE General Ledger this class will give you the confidence and direction to create your own new reports. Create reports for your boss, banker, CFO and others on your own! **2 hour session**

**TRAVERSE Sales Order Pricing Matrix** - Are you aware of the options in setting up the pricing matrix through Sales Order? We'll take a look at the following structures: customer level, promotional pricing, customer pricing and generic price structure. **1 hour session**

**TRAVERSE SO/PO Link** - Purchase orders can be created and linked to sales orders when doing a custom order, drop ship, or when renewing the quantity on hand to fulfill a sales order. We will show you how to link these and the impact they will have on costing and quantities. **1 hour session**

**TRAVERSE Reorder Setup and Processing** - Learn step-by-step how to set up your inventory item for reorder processing. We will then walk through the process of completing the reorder process through TRAVERSE. **1 hour session**

**TRAVERSE Project Costing General Ledger Accounts by Project Type** - Do you look at the Project Cost Distribution screen and ask yourself why there are so many accounts and what effect it will have on your General Ledger? We will discuss the project type selections and the impact they will have on your GL. **1 hour session**

**TRAVERSE Project Costing Round Table** - This Project Costing round table discussion is your opportunity to ask operational questions, share your unique solutions with other users, and offer product enhancement ideas to the Open Systems design team. **1 hour session**

**Getting Ready to Run TRAVERSE Manufacturing** - We'll cover the setup steps necessary for a smooth TRAVERSE Manufacturing implementation, and we'll discuss a list of things to consider before you do your actual setup. **2 hour session**

**TRAVERSE DRP/MRP with Blanket Orders** - Need to know how to set up MRP/DRP? Not sure how to do blanket orders? Find out here! **2 hour session**

**Understanding TRAVERSE Manufacturing Costing** - Accurate costing means more profitability. Find out how TRAVERSE Manufacturing costing can keep your business profitable. **1 hour session**

**SQL Reporting Services – Basic/Non Coding** - Do you wish you could do custom reports? Imagine drilling down from customer summary to invoice detail to item detail! We'll show you how to set up non-programming reports using SQL Reporting Services. **1 hour session**

**TRAVERSE Design Studio** - The TRAVERSE Design Studio, introduced as part of version 11, is a powerful design tool that enables you to add custom fields to your software, change the layout of the data entry forms, and make many other changes to the software - all without programming. **1 hour session**

**TRAVERSE Flex-Pack: Sales Order** - TRAVERSE Sales Order now has the ability to create up to five quotes at a time, allowing you to decide pricing and profit based on quantity, margin or mark-up. With the simple click of a button you can create the sales order from the estimate your customer agreed to. From the sales order, create a production work order without changing screens. Your estimates are saved for quick reference and easy creation of future quotes. **2 hour session**

**TRAVERSE Flex-Pack: Warehouse Management** - TRAVERSE Warehouse Management has new enhanced shipping functionality, allowing the user to create specific shipping instructions. We'll also cover blind shipments and the new Bill of Lading features. **2 hour session**

**TRAVERSE Inventory for Flexible Packaging** - In this two-hour session we will review the enhanced User Defined Fields functionality, learn about the changes for Production Standard Unit of Measures, the addition of the Roll and Skid Label Kits and much more. **1 hour session**

**Ten Leadership Musts** - The success of any organization depends on many factors – one of them being leadership. What differentiates good leadership from bad? What does a great leader do? In this session we'll explore ten key things great leaders do and give you specific ideas on how they accomplish them. **1 hour session**

### **An Essential Solution for Success in Today's Changing Times**

Join Dr. Michael Bertini as he discusses the essential tools needed to keep you competitive in today's market. Dr. Bertini has helped hundreds of companies thrive by transforming their organizations. **1 hour session**

**Organizational Goal Alignment & Teamwork** - In today's work environment it is critical to effectively leverage all available resources; to harness and channel them in a way that maximizes results. This is easier said than done. This session will focus on how to achieve organizational goal alignment and teamwork with a high degree of commitment and accountability. **1 hour session**

**Using UnForm with OSAS** - In this session get an overview of UnForm, SDSI's most popular software product. Learn how you can seamlessly integrate UnForm® with your application and offer laser printed forms, e-Documents in PDF format, emailing of e-Documents, laser printed checks, and presentation quality reports.

Also see the optional components available in UnForm; Document Management and Archiving and Document Imaging/Scanning. This new technology offers the capability to automate the archiving of documents at the time documents are printing 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. Presented by SDSI. **1 hour session – Presented by SDSI**

### **EDI and TRAVERSE: Alternatives for Cutting Costs in a Difficult Market**

In today's contracting economy, driving efficiencies into every-day business activities is critical for survival. Automating your customer communication and order fulfillment with TRAVERSE reduces time and money spent, while letting you focus on what matters most to your business. **1 hour session - Presented by SPS Commerce**

### **Document Management for TRAVERSE and OSAS**

OptiDoc is a fully integrated document management system that works with all of the TRAVERSE and OSAS applications. This means that you will never have to leave your Open Systems application to find your documents.

OptiDoc can capture documents generated by TRAVERSE and OSAS. This allows you to have customer invoices and statements viewable by your customers through the web, This improves customer service and saves your employees countless hours in regenerating and supplying these documents to customers. In addition, you can have proof of delivery documents, MSDS and specifications documents available for customer self service. Let us show you what OptiDoc can do for your organization. **1 hour session – Presented by Optidoc**

### **Tools to Manage Cash Flow in TRAVERSE**

Learn about all of the tools available to help manage cash flow in TRAVERSE and OSAS. **2 hour session**

## **IP-PBX and VoIP Technology Update and Integration with OSAS and TRAVERSE**

Learn the latest about IP-PBX and VoIP technology with an overview of FacetPhone, recipient of Internet Telephony Magazine's 2008 Product of the Year award. And see how you can make money with the FacetPhone Referral Program.

You will see the resulting power of integrating an 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." And some application integration has already been developed for OSAS and TRAVERSE environments which results in a very fast return on investment. Here are some of the things that will be demonstrated in this session:

- 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 an IP-PBX VoIP telephone system – "IP From the Ground Up." FacetWin and FacetTerm are powerful networking, terminal emulation, and productivity products used worldwide by over a million people. **1 hour session - Presented by FacetCorp**

Plan to arrive early on Tuesday to attend preconference training at no additional cost:

## **The Learning Lab**

The Learning Lab will be open daily throughout the conference. The lab is the place to go for one-on-one questions you might have. Stop by to have your questions answered and put a face behind that friendly voice you may recognize from our support team. There will be both OSAS and TRAVERSE specialists in the lab.

### **Lab hours:**

Tuesday 1:00-5:00

Wednesday 9:00-5:00

Thursday 8:00-3:00

## Pre Conference Training

### Success Orienteering Workshop

*Presented by Bret Romney – Ascend Strategies, Inc.*

This course is designed to help existing users bring their business to the next level. The framework provided during this course includes proven principles and disciplines that will aid any organization to achieve higher results.

Tuesday, June 9<sup>th</sup> 1:00 p.m. - 5:00 p.m.

5-13-09

*Subject to change*