COURSE SYLLABUS: ProcessPro is excited to be offering a wide range of informative courses at Connect 2017. New this year, we will be showcasing our latest ERP solution offering, ProcessPro Global. We encourage you to attend any of the following Global courses (indicated in green) if you are interested in learning more about this product. We are also pleased to offer industry-specific discussion groups and numerous courses for new and advanced users of ProcessPro Premier. We’ve included target audiences for these courses to help you identify the most beneficial sessions to attend. We look forward to hosting an informative and exciting Connect 2017!

ProcessPro Global

Product Overview (Global)
Join us for a product overview of the first release of ProcessPro Global! This class will provide attendees a general overview of the software, highlighting applications and features, as well as user interface and navigation.

Extended Features and Applications (Global)
Join us to see first-hand the additional applications and features ProcessPro Global has to offer, such as Fixed Assets, Web Portal, CRM, Project Costing, Point-of-Sale (POS), integrations and more.

Order to Cash Overview (Global)
Attend this course to learn about ProcessPro Global’s features as we perform a day-in-the-life walk-through from placing an order to receiving and applying the payment.

Procure to Pay Overview (Global)
This course will demonstrate some of ProcessPro Global’s key functionality within the purchasing process. Join us as we walk through the steps for procurement of goods through receipt and payment to vendor.

Issue to Complete (Global)
Experience the manufacturing process in ProcessPro Global, as we perform daily tasks from scheduling of production to issuing of materials and the completion of finished goods.

Financials (Global)
This course will highlight ProcessPro Global’s financial management features in the areas of GL, AR, AP, costing and reporting.

Reporting Options (Global)
Attend this course to learn more about the available reporting options for ProcessPro Global. We will discuss reporting and report scheduling, use of Info-Alerts, Interactive Views and Advanced Analytics.

Mobile Warehouse Solution (Global)
Get a sneak peek into ProcessPro Global’s warehouse management solution. This session will cover transactions such as receiving purchase orders and finished goods, picking transfers and orders, as well as moving inventory.

Transitioning to ProcessPro Global
Join us for an overview of transitioning from Premier to Global, including infrastructure recommendations, data management and training questions.
Industry Discussion Groups

Let’s Discuss! Compliance and Certification for Food and Beverage Manufacturers
Join your food and beverage manufacturing peers for an open discussion regarding FDA compliance and certifications such as SQF, BRC, etc. Discuss common issues, FMSA Food Safety Plans and PCQI’s, industry updates and trends. Help ProcessPro better understand the challenges and issues you are experiencing in this area to better understand how we can help.

Let’s Discuss! Compliance and Certification for Dietary Supplements / Pharma / Nutra Manufacturers
Join your dietary supplement, pharma and nutra manufacturing peers for an open discussion regarding FDA compliance and certification questions and issues faced by these industries. Help ProcessPro better understand the requirements, challenges and issues your company is facing now or in the near future.

Let’s Discuss! Compliance and Certification in Use and Manufacture of Hazardous Materials
Join your specialty chemical, paints and inks manufacturing peers for an open discussion regarding GHS compliance and certification questions and issues faced by these industries. Help ProcessPro better understand the requirements, challenges and issues your company is facing now or in the near future.

ProcessPro Premier

Accounting & Financial Management

Sales and Commissions (Premier)
A company’s commission's calculations are often driven from the selling price. Because of this relation, it’s important to understand the different set up options for both sales contracts and commissions contracts. During this session, we will provide a comprehensive review of the different configurations Premier has to offer and how to automate the commission calculations to save time.
Target Audience: Accounting and Customer Service Personnel

Tracking Your Landed Costs More Effectively (Premier)
Learn how to accurately represent your costs of goods by effectively tracking landed costs. In this session, we’ll review how to utilize Premier’s landed cost codes to capture all related expenses, such as shipping charges and insurance fees.
Target Audience: Accounting and Operations Personnel

Managing Labor and Overhead (Premier)
Struggling to incorporate labor and overhead into your product costs? Contemplating changing, adding or revising how you apply overhead costs? Attend this course to discover the options available to you in Premier.
Target Audience: Accounting and Production Personnel

Standard vs. Average Cost (Premier)
Gain insights into the differences between standard and average cost inventory valuation. We will compare and contrast the two costing methods available in Premier and review the transaction flow using both methods. As well, review the steps involved to make a change from one costing method to the other.
Target Audience: CFO, Controller, Cost Accountant and those with a stake in costing

Best Practices: Financial Reporting (Premier)
This session will include best practices on which financial reports you should be executing and retaining each period to support your General Ledger in Premier.
Target Audience: Accounting Personnel
Account Reconciliation / Sub-Ledger Accounting Flow (Premier)
Join us to learn how to reconcile the General Ledger accounts in Premier, including investigating transactions and the effect of the sub-ledger transactions. We will also demonstrate techniques for reconciling the sub-ledgers to the GL.
Target Audience: Controllers and Accounting Personnel

Best Practices: Closing, Archiving and System Manager (Premier)
Are you effectively managing your Premier system maintenance procedures? We will review how to correctly perform month-end and year-end closings, as well as review user level security and privilege settings. We will also discuss performing system changes, like “Key Changes” and archiving data, and how these functions affect baseline reports, analytical / ad-hoc reporting activities and the end-user.
Target Audience: System Administrators, Controller and Ad-hoc report writers

General Ledger Effects and Inquiries (Premier)
In this course, we'll dig into potential root causes of your General Ledger inquiries. We'll discuss questions such as “Why doesn't the Work in Progress report balance tie to the GL? And why is my Manufacturing Clearing account increasing each period?”
Target Audience: Accounting Personnel

Recurring, Reversing, Allocation and Standard GL Entries (Premier)
Discover how Premier can save you time and reduce manual entry through the use of recurring entries. Specifically, we will cover journaling the same entry, using the same accounts but different amounts and allocating utilities over multiple departments each period. We'll also explore reversing entries in a future period.
Target Audience: Accounting Personnel

Operations, Production and General Use

Utilizing Quality Control (Premier)
Users of Premier 10.4 and later versions experience increased functionality and more flexibility using Premier's Quality Control application. Attend this session to discover how to define tests and target values, enter test results and change the quality control status of your inventory.
Target Audience: Quality Assurance Personnel

Preview of 10.8 (Premier)
Join us for an overview of the new features and functions included in Premier 10.8.
Target Audience: Companies interested in upgrading to Premier 10.8

Best Practices: Physical Inventory (Premier)
Inventory is your company’s greatest asset and you need to make sure you’re counting it correctly. In this course, we’ll show you how to apply industry best practices while using Premier's tools and functions to efficiently and effectively perform physical inventory in your warehouse.
Target Audience: Inventory and Warehouse Management Personnel

Best Practices: MRP – Data Setup (Premier)
As Materials Requirement Planning (MRP) is the backbone of your ERP, you need to ensure correct data within your system. This course will cover the best practices in setting up your data and any necessary cleanup steps required for MRP to provide meaningful recommendations and avoid irrelevant data.
Target Audience: Companies not currently using MRP or Operations and Warehouse Management Personnel
MRP – Buyer Tool (Premier)
As a purchasing resource for your company, you’re likely analyzing current inventory numbers, upcoming orders and projected manufacturing needs. ProcessPro’s Material Requirements Planning (MRP) allows for more effective and efficient use of these resources and data. Join us to discover the steps involved in using MRP to analyze transactional data and utilize the Buyer Wizard to create actionable purchase orders. We encourage you to attend the “Best Practices: MRP - Data Setup (Premier)” session prior to attending this course.
Target Audience: Purchasing Agent / Buyer and Materials Management Personnel

MRP – Planner Tool (Premier)
Are you in charge of planning production for your company? Utilizing ProcessPro’s Material Requirements Planning (MRP) means a more streamlined and effective use of your resources. Come see firsthand the steps involved in using MRP to analyze your transactions and using the Planner Wizard to turn suggestions into batch tickets. During this session we will review the Supply / Demand report and walk through options to filter for your specific needs. We encourage you to attend the “Best Practices: MRP - Data Setup (Premier)” session prior to attending this course.
Target Audience: Production Planner / Scheduler and Materials Management Personnel

Preparing for AWS (Premier)
Looking to streamline and automate inventory transactions using ProcessPro’s Automated Warehouse Solution (AWS)? Using AWS in your warehouse can increase operational efficiency and accuracy through the elimination of manual data entry and turning your warehouse into a real-time operation. We’ll cover AWS benefits, infrastructure recommendations, implementation steps, device options and requirements for racking ID along with items labeled with barcodes.
Target Audience: Companies not currently using AWS or Operations and Warehouse Management Personnel

Transacting in AWS (Premier)
Come learn the how-to’s and recommendations for using ProcessPro’s Automated Warehouse Solution (AWS). This session will cover the transactions in AWS, such as receiving purchase orders, moving inventory, printing labels, picking sales orders and production posting. We encourage you to attend the “Preparing for AWS (Premier)” prior to attending this course.
Target Audience: Companies not currently using AWS or Operations and Warehouse Management Personnel

Hands-on with AWS (Premier)
Ready to advance your usage of ProcessPro’s Automated Warehouse Solution (AWS)? Then you should join us for a hands-on experience to see how easy it is to scan barcode labels and complete transactions in the software. We will have different devices and printers available for you to work with.
Target Audience: Operations and Warehouse Management Personnel and users looking to experience AWS

Dock and Batch Ticket Scheduling (Premier)
Do you ever ask yourself, am I over-booked at the loading dock? Do you wonder if you have the production capacity to fulfill your customer’s orders? A high degree of visibility in production and dock scheduling allows for efficient use of business resources and prevents conflicts and confusion in the process. Premier’s scheduling modules – the production-oriented Advanced Scheduler and the shipment and receiving focused Dock Scheduler can help you answer questions like these and make transactions easier to process.
Target Audience: Operations, Production Planners and Logistics Personnel

Production and Work Order Management (Premier)
Do you manage daily work orders and production? This course will help you leverage Premier’s work order functionality from a variety of roles. We will demonstrate how to effectively communicate with operators and discover the importance of disciplined work order posting for accurate data. We will also explore different reporting options available to identify and minimize potential shortages in advance of production, and evaluate performance on past production.
Target Audience: Operations and Production Management Personnel
Planning Your Upgrade (Premier)
Planning to upgrade your Premier software soon? Join us to discuss how proper planning and execution will help you get the most out of your upgrade. During this course we will discuss our seamless phased approach to upgrading your Premier software package. We will also discuss infrastructure planning for your upgraded system, as well as ways to maximize the overall benefits and features of software updates.

Target Audience: IT, System Administrators and Companies exploring options to upgrade their Premier version

Label Printing (Premier)
The BarTender software and its integration to Premier is a powerful toolset that is often underutilized. Join us in this session to see how to quickly and easily create labels that can be customized to suit your specific business requirements. We will discuss adding new database fields, conditionally printing images based on ProcessPro database contents and other techniques to streamline and get the most out of the program.

Target Audience: Materials, Operations and Warehouse Management Personnel and those with a stake in labeling

Navigation and Personalization (Premier)
This course will demonstrate some of the key navigation and personalization tools available to desktop users of Premier. This includes the use of “favorites” for common functions, valuable hotkeys, and customizing the Tasklist in order to open other applications from ProcessPro, such as Business Intelligence reports. We will also discuss the deployment of these functions to other users and touch on simplifying AWS screens.

Target Audience: All users new to Premier

How Do I? Common Questions (Premier)
Find the answers to a variety of common questions, problems and everyday tasks in Premier. We’ll answer questions like, How do I…change my font color, add information to a picklist, change field labels on screens, check which users are logged in, update my logo on forms and documents, clear locks for a user and more – all while pointing out potential hazards and challenges that may emerge from these processes.

Target Audience: IT and System Administrators

EDI Basics (Premier)
Join us to learn the basic concepts of the EDI world, including terms like transaction sets, VANS and trading partners. This session will demonstrate Premier’s EDI functionality for integration of purchase orders and invoices, and review how the approach is standardized to help your organization meet EDI compliance requirements for your customers.

Target Audience: Companies not currently using EDI

What's New in EDI?
Join us to review the developments and requirements for EDI compliance. We’ll take a look at TrueCommerce initiatives and developments for 2017 and beyond, and walk through a sample demo of core TrueCommerce EDI products.

GHS Compliance
ProcessPro and Lisam ExESS are delivering a solution that saves you time and money, and more importantly, keeps you compliant in today’s world. Attend this session to review Lisam’s ExESS software solution, whether you are currently compliant, a late adopter or have questions regarding GHS compliance, GHS labeling, SDS authoring and distribution platform, multi-lingual SDS (MSDS) document generation in 50+ languages, automated SDS Email Distribution based on Sales Orders in Premier and more!

FDA Food and Supplement Labeling Regulatory Compliance
This presentation covers the complexities of the FDA's nutrition and supplement labeling regulations and how Genesis R&D® can assist with compliance. In addition, we will be discussing Genesis R&D integration solutions with ProcessPro software to increase efficiencies and reduce errors caused by duplicate entry.
Quality for ProcessPro by uniPoint: Total Enterprise Quality Management Solution
In this session, you will learn how to lean-out your quality management system. Quality for ProcessPro by uniPoint is a configure-to-order suite of twenty-two quality modules, offering real-time integration with your ProcessPro ERP or Traverse ERP systems and all the controls required for a certified quality management system.

Quality for ProcessPro by uniPoint - Managing Your Mobile Inspection Process
In this session, you will learn about our flagship Inspection Module, offering time-based and mobile inspections. Understand how our inspection process is tied directly into our Non-Conformance process, with visibility to the calibration and maintenance status of your Tooling & Equipment.

ProcessPro Global and Premier

Reporting and Technical

Introducing Advanced Analytics (Global and Premier)
Wondering what’s trending in your business? Join us to discover how Advanced Analytics’ powerful reporting capabilities brings your data to life using metrics, KPIs, dashboards, multi-year trends and other key analytics, as well as reporting and report scheduling options. All in a simple user interface with mobile reporting on any device!
Target Audience: Business Analysis and Operations Management Personnel and those with a stake in reporting

Forecasting with Advanced Analytics (Global and Premier)
How accurate is your forecast? Attend this session to learn how Advanced Analytics + Forecasting can finally deliver the accurate forecasting information you’ve been striving for at any level (customer, product line, product, etc.).
Target Audience: Business Analysis and Operations Management Personnel and those with a stake in reporting

Working with Advanced Analytics (Global and Premier)
Are you an Advanced Analytics user looking to do more? Please join this course to learn more about report-building, data manipulation, customizing views and use of custom expressions, custom MDX and other features to help create truly compelling content!
Target Audience: Business Analysis and Operations Management Personnel and those with a stake in reporting

Business Intelligence Workshop (Premier)
Do you have ideas for reports, but find that you struggle to implement them? Would you like to improve your report writing ability by learning best practices within ProcessPro Premier's Business Intelligence (BI) Suite? Attend this open work lab for information on report development, as well as a hands-on session to expand your knowledge of BI and create value added reports that can be implemented right away. Please come prepared with workstation and connection information to access the BI suite on your company’s server.
Target Audience: BI report developers of all experience levels

Making the Most of Your Data (Premier)
With all the day to day activity in Premier we understand that there is a vast amount of data that is being stored. Let’s explore the Data Center, Data Dictionary and Data Views to learn how to navigate the data within the system. We’ll learn how to take a business question you may have and translate that into queries of the database.
Target Audience: Business Analysis, IT, System Administrator Personnel and skilled data analysis staff

Manipulating Your Data (Premier)
Have you ever been tempted to manipulate your Premier data behind the scenes? Join us to learn the complexities of adjusting data and what our team researches when your company needs updates using SQL Server Management Studio, including where data is located, exporting data, Excel ODBC connections and knowing what’s safe to update and when to ask for help to avoid the pitfalls of manipulating your own data.
Target Audience: Business Analysis, IT, System Administrator Personnel and skilled data analysis staff
System Maintenance - Technical Review (Premier)
Do you ever wonder what the system is really up to when you run the System Manager maintenance routines? We'll take a closer look at some of the key functions in SM from Reindexing, Clearing Flags, Recalculating File Balances, Purging data and more. Please bring your questions.
Target Audience: IT and System Administrator Personnel

Best Practices: IT Infrastructure (Global and Premier)
Overview of ProcessPro system requirements and recommendations on infrastructure redundancies and SQL server hardware optimizations.
Target Audience: IT and System Administrator Personnel

Full Group Presentations and Conference Extras

General Session
Dr. Michael Bertini, Open Systems Owner and CEO, will welcome and address all attendees at the conference.

ProcessPro Keynote
Join other ProcessPro clients to hear insight into the product direction and strategy for the future from the ProcessPro team.

ProcessPro Support Lab
An area will be staffed with support ‘Pros’ from ProcessPro, providing you the chance to meet with these professionals and work with them one-on-one to answer your questions. This area will be available throughout the entire conference.

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