Account Payable: General Overview

Join us for an overview of Accounts Payable. We'll take an introductory approach to AP by learning frequent functions of the transaction cycle. This class will walk through AP setup, workflow, and posting processes.

Handling Open Invoices In Accounts Receivable
Traverse Users

We will focus on how to handle both long and short-term deposits, write-offs, transactional cash receipts, and the effect of periodic processing. Attendees will walk away with a better understanding of open invoices, deposits and payments on transactions.

Advanced Analytics for Report Designers

Join us to learn how to take Advanced Analytics report visualizations to the next level. This class will focus on the use and available tools within Advanced Analytics to make your data truly shine! Users will learn how to manage KPI values, adjust colors and appearance of graphs and data and further enhance the powerful capabilities in Advanced Analytics. This class is meant for executives and report designers looking to see how your visualizations and views can be enhanced.

Advanced Analytics: Utilization, Tips and Tricks
ProcessPro Users

Attend this session to learn more about harnessing the power and features of Advanced Analytics. This session is intended for users who have already implemented and are using Advanced Analytics.

Advanced Design Studio In Action
Traverse Users

Ready, set, design! Let us help you take your Design Studio usage to the next level with real-life examples and step-by-step instruction.

Avalara: The TRAVERSE Experience
Traverse Users

Are you considering implementing the Avalara sales tax solution? See how this integration looks for the Traverse Users

Bank Rec: Managing Non-AP/AR Entries

Are you struggling with transactions that occur outside of AP and AR when performing bank reconciliation? In this session we will explore the best ways to handle exceptions, corrections, and adjustments to your transactions.

Help! Troubleshooting Bank Rec Balances
Traverse Users

During this interactive session, attendees will learn how to identify and correct the issues causing an out of balance statement. We will also supply best practices for preventing the discrepancies from happening again.

Best Practices: Financial Reporting
ProcessPro Premier Users

Are you interested in learning if your financial reporting processes adhere to the industry best practices? Join us to discuss which financial reports you should be executing and retaining each period to support your General Ledger in ProcessPro Premier.

Best Practices: Labeling
ProcessPro Users

This session will discuss how to leverage your data as a system of record for label attribute information, and how it can be pulled and added on the label template. Most attention will be focused on common customer requirements, but the concepts and techniques will apply to any label generated out of the system. This class is meant for users of BarTender Software.

Best Practices: Maintenance and Month-end Procedures
ProcessPro Premier Users

Attend this session to learn how to effectively managing your end of period procedures in ProcessPro Premier. We will review month and year-end closing processes to ensure you are performing the correct functions, at the correct time. You will also learn how to implement user-level function security and identify the most important and useful privileges. After attending this course, you will understand what happens through archiving or using the system's "Key Change" function to rename master data and what it means to your end-users, baseline reports and analytical / ad-hoc reporting activities.

Beyond Purchase Order: Additional Functionality

In this session we will take a deeper look at all of the applications that extends the Purchase Order functionality to vendors and the warehouse floor. PO Approval Portal allows non-Global ERP users to make purchase request and / or approve requests for purchases from anywhere. Warehouse Management takes receiving out of Purchase Order and into the hands or your warehouse manager and workers.

Beyond Sales Order: Additional Functionality
Traverse Users

Join us for an in-depth look at the applications that extend Sales Order functionality for your warehouse workers, sales teams and customers. Warehouse Management's mobile functionality places picking, packing, and shipping of Sales Orders into the hands or your warehouse manager and workers. Point of Sale streamlines over the counter sales, allowing you to easily sell goods to walk in or existing customers. Portals, give your sales reps on the road functionality for customers to place orders, check order status, reprint invoices and even make payments.

BOM and Item Maintenance
ProcessPro Global

This session will provide an in-depth overview of BOM and item setup to build a better understanding of how they work together. Over the hour, we will include a discussion on production costing in the application of labor, overhead, and machine time, and how these elements impact routings and resources.

Cash Flow! It's Just Another GL Statement...

Everything you need to know about the General Ledger Cash Flow Statement. This includes, how to use this report for number-driven decision making and planning.

Credit Card Processing (CCP) and TRAVERSE Payment Services (TPS) - What does it mean for me?

Let's start at the ground level and highlight the differences between Credit Card Processing (CCP) and TRAVERSE Payment Service (TPS) and how TPS can allow you to process credit card payments quickly and securely. We will then walk through the steps that Open Systems will be take to make the change for you.

Credit Cards: Manage and Reconcile Like a Pro!

Join us to learn how to streamline the daunting task of managing and reconciling your business credit cards. Let us teach you how to use the tools in Accounts Payable and Bank Reconciliation to manage your card expenses and prepaid invoices.

Did You Know? Sales Order Capabilities Edition

Let's look at the underused features of the Sales Order functionality, such as SO Linking, Copy From History, Attachments, Drill Downs / Interactive Views, Reprint Invoices to discover what you're missing.

Did You Know? System Manager Edition

In this class, we will dig into System Manager and its underutilized features, to help you receive more value from your investment. You'll walk away with helpful hints and shortcuts to maximize your use.

Oh Snap! Document Delivery Issues
Traverse Users

Another rejected email? We can help! Attend this interactive session where we cover tips, tricks, and common roadblocks for document delivery. We will discuss what happens when your email server doesn't agree with document delivery and identify other issues. BYOI (Bring your own issues) and we will work together to find your resolution!

Document Delivery and Document Archiving

In this session, you will learn how to fully utilize the document delivery system and archive functionality. We will teach you how to build custom mail templates, manage document queues, and review historical delivery and printing.

Streamlining Quality Control
ProcessPro Premier Users

Discover the increased functionality and user-friendly application of ProcessPro Premier's Quality Control. This session will demonstrate the setup of tests and target values, how to enter test results and updated inventory status. This application is available in Premier versions 10.4 and higher.

General Ledger:
Building Financial Report Layouts

Do you find yourself completing workarounds when reporting from the General Ledger? Not after this session! As we will provide practical tips on inserting accounts in between other accounts, headings that span multiple columns, and formatting with commas, dollar signs, decimal points, etc.

Get Control of Your Spending!

Ready, set, go! We will demonstrate how to use Purchase Order Routing and Approval to route your order requests and requisitions for approval. Attendees will walk away with tools they can implement and see returns quickly.

Get to Know Advanced Analytics

It's back! As one of the most popular courses in 2018, attendees learn how to empower their data to decipher the unique variables and trends within their business. Attend this session to see how Advanced Analytics can enhance your data with visualization and insight into your business like never before. Enabling executives, sales teams, managers, and end-users with key information on an easy-to-use analytics platform!

Get to Know Forecasting +
Advanced Analytics

How accurate is your current forecast? Join us to glimpse into the future using your historical ERP data, forecast tournaments and algorithm options, and other features to help more accurately forecast on your key data points (customer, product line, product, etc.) for insight and planning.

Get to Know ProcessPro Global:
Extended Features
ProcessPro Global Users

ProcessPro Global offers a number of powerful solutions such as integrated Fixed Assets, CRM, Payroll, HR, Web Portal, Service and Maintenance and more! Attend this session to see an overview of this broad suite of available applications and features.

Get to Know ProcessPro Global: Overview
ProcessPro Global Users

Attend this session for a product overview of ProcessPro Global! This course will provide an overview of the Global solution including the core applications and features, as well as the updated user interface, user options and general navigation within the powerful application.

General Ledger vs. Subsidiary:
Who's Winning the Battle

We'll determine which ledger is victorious as we delve into balancing subsidiaries to the General Ledger. We will also investigate discrepancies between: AP, PO Accrual, AR, IN, BR, and WIP. Come to this class and shorten your month-end close process.

Global Interactive Views:
How is this different?

Attend this session to revitalize your Interactive Views capabilities using new Global 11.2 tools and enhancements. We will explore search, filtering, conditional formatting, and group-by-summary.

Global: What Happened to My Favorites!?
Understanding My Work

Maybe you've mastered the Favorites menu in Global or maybe you are in need of a more personalized user experience, we invite you to attend this session to learn about the new My Work capabilities. We will share tips and tricks on how My Work offers more flexibility when organizing menu functions specific to your daily, periodic, or regular workflow.

Let's Dig In: Balancing Accounts
ProcessPro Premier Users

What should you do if your accounts are out of balance? Join us in this interactive session to dive into some of the likely culprits, from simple unposted batches to trickier scenarios like user sessions remaining active, inventory account reassignment and more.

Let's Dig In: Bank Reconciliation Woes
ProcessPro Premier Users

During this ProcessPro Premier interactive session, we'll be discovering some of the reasons for discrepancies when reconciling the bank statement to your cash balance and how to avoid future issues

Let's Dig In:
Purchase Order through Accounts Payable
ProcessPro Premier Users

The receiving dock is often a fast paced environment, with limited space - mistakes are bound to occur. Common receiving challenges will be discussed in this interactive session, such as: when a single lot turns out to be two, when there is conflict between manufacturing / expiration dates and reprinting receiving labels.

Let's Dig In: Transformation of Item Costs
ProcessPro Premier Users

Do you ever question your item costs? In this interactive session, we'll dig into inventory and production transactions to identify what might have caused item costs to change.

How Do I? Common Support Questions for ProcessPro Premier
ProcessPro Premier Users

Join this interactive session for the answers you seek for a variety of common questions, problems and everyday tasks in ProcessPro Premier. Everything from changing field labels to updating logos to clearing user locks will be discussed with clear steps to take to solve each scenario. We'll also discuss the Client Support experience with common tips and suggestions when submitting incidents. Please come with your questions!

Imports: How and When is this the Right Answer?

Let's take the next steps in your business process. Join us to learn how to create simple imports to update customer pricing and physical inventory counts - two very easy and important functions that will answer your question of when to perform imports.

Info Alert Troubleshooting
Traverse Users

In this interactive session we encourage attendees to bring their questions and real-life examples of Info-Alert, and along with our team of experts we will troubleshoot your issues. This session is geared to provide takeaways that will enhance your use of the application.

Info Alert: Scheduling and Planning

In need of a personal assistant? Join us as we show you how to configure Info-Alert to send email alerts, scheduled events, and other automated actions. With over 40 standard alerts to use and keep you current and updated, each attendee is sure take away timesaving techniques.

Interactive Views 101

Master the fundamentals of Interactive Views, in this overview course. We will explore the basic usage of the solution and its available features of sorting, grouping, graphing and producing business reports. Attended this class and start dreaming of the possibilities for your business!

Solution Overview: CBD, Hemp, and the Cannabis Industry with ProcessPro Global
ProcessPro Users

Interested in learning about ProcessPro's solution offerings for the CBD, Hemp and Cannabis industry? Join us for a peer discussion on the current challenges and trends in this emerging and exciting market. Content will cover available product solutions, cultivation, and compliance.

Finding Your Data
ProcessPro Premier Users

Attendees will learn how to navigate and query the ProcessPro Premier database to find the answers to their business questions. We'll explore the Data Center, Data Dictionary and Data Views to help you understand the vast amount of information collected in Premier.

Managing your Most Important Human Resources

If you are responsible for managing employee information, health insurance, retirement, certifications, and other critical information, this class is for you! We will teach you how to utilize the Human Resources application for reducing manual methods, document retention, and data security.

Manipulating Your Data in Excel Part 1
ProcessPro Premier Users

This series is for ProcesPro Premier system administrators and technical users who are experienced with Microsoft Excel. Join us to learn about manipulating your data for enhanced interactions. We will cover Power BI, auto refreshing of data, charts and graphs.

Manipulating Your Data in Excel Part 2
ProcessPro Premier Users

In this series, we will go deeper into manipulating your data, Power BI, auto refreshing data, charts, and graphs. Attendees are encouraged to bring scenarios and questions, for engaging interaction. This class is intended for ProcesPro Premier system administrators and technical users who are experienced with Microsoft Excel.

MRP – Deep Dive
ProcessPro Premier Users

Whether you're already using MRP and looking to get more out of it, or you're newer to the tool and just want a glimpse of the more advanced features available, this is a class worth attending. We will dive more deeply into the Demand / Supply report, including tracing real and anticipated supply and demand to understand where a specific suggestion comes from. We will also discuss the Master Production Schedule (MPS), including its mechanics and usage.

MRP - Utilizing the Buyer / Planner Tool
ProcessPro Premier Users

Learn how to make use of the MRP Buyer and Planner wizards, from generating the MRP dataset and review of orders. We will focus on the new MRP messaging functionality and how that tool can be leveraged to make intelligent decisions, easily.

MRP - How to Setup your Data
ProcessPro Premier Users

Secure your seats quick, this class is always popular! Material Requirements Planning can be a powerful engine driving production and purchasing decisions. This session will focus on how to fine-tune the process to run smoothly with your particular business needs. This session will be valuable to new users of MRP, while still offering enough depth and discussion of newly released features for seasoned MRP users to pick up something new.

Navigation and Personalization

This session is geared toward newer users of Global, but even experienced users are likely to walk away with one or two new tricks. We'll discuss the new menu navigation enhancements, as well as operating within different types of screens, managing tabs and windows, maintaining user preferences and document printing / delivery. We will also highlight and preview user-specific dashboards and My Work functionality.

What's New in TRAVERSE Global 11.2?
Traverse Users

Join us for an overview of the new features included in TRAVERSE Global 11.2, including Interactive Views, My Work, Design Studio, navigation, and more!

OK, I Linked It...Now What?
Traverse Users

In this class, we will work through the nuts and bolts of linking PO inventory, non-inventory, service, and dropship items that impact order fulfillment and accounting.

How To: Optimize AWS Transactions
ProcessPro Premier Users

Come learn the how-to's and the recommendations for using ProcessPro Premier's Automated Warehouse Solution (AWS). This session will cover transacting in AWS, such as receiving purchase orders, moving inventory, printing labels, picking sales orders and production posting. New and experienced users will discover ways to optimize their solution that can implemented right away.

Streamlining the Order to Cash Process
ProcessPro Global Users

Attend this course to learn about ProcessPro Global's features as we perform a day-in-the-life walk-through from creating an order through picking, shipping, invoicing and posting of cash.

Optimizing your Order to Pay Process

This course will demonstrate some of 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.

Payroll: Exploring Leave Codes and Automatic Accruals

Let's dig into Payroll! During this in-depth session we will cover setting up leave codes for automatic accruals, using employee-specific hourly earning codes, excluding deductions, wages from taxability, and proofing out taxable wages for Federal, State, and local entities.

Purchase Order: The Reorder Process

Learn to configure and utilize PO reorder processing. From measuring minimum / maximum order quantities, to reordering to meet current demand, the reorder processing functionality can help to remove the guesswork from replenishment.

Point of Sale: In Action
Traverse Users

New this year, this session will provide users a day-in-the-life example using the POS application from TRAVERSE.

Production Management
ProcessPro Global Users

Management of the production flow is critical both on the production floor and within ProcessPro Global. Attend this session to learn the basics of recording material, labor and machine time to orders that are created and released for production. Topics will include: production order statuses and their possible uses, editing released orders and reviewing, completing and posting production orders.

Production Scheduler
ProcessPro Global Users

Are responsible for coordinating and developing production schedules on a daily or weekly basis to meet goals? Join us to learn how to best utilize the Production Scheduler application to account for BOM setup, work centers, and allergen management.

Roundtable Discussion: Project Costing

During this interactive discussion, we invite attendees to share their questions and scenarios surrounding the Project Costing application. Attendees should expect to collaborate and leave with new ideas and recommendations from fellow users and our team of experts.

Project Costing:
Selecting the Right Project Type

Learn the meaning of the different Project Costing types, including their purpose and accounting implications.

Quality Control

Join this session to learn about the functionality and flexibility using ProcessPro Global's quality control, including defining tests and target values, entering test results and changing the status of your inventory.

Reconciling and Managing
Purchase Order Deposits

Master the fundamentals of PO deposits to keep your GL and AP reconciled.

Reconciling Inventory: Stop the Bleeding!

Learn to minimize the discrepancies between your GL and sub ledger using simple best practices for monthly procedures.

Requirements Planning
ProcessPro Global Users

Attend this session for an overview of the Material Requirements Planning process in ProcessPro Global. We'll be learning how to use the application from data setup, analyzing current inventory numbers, upcoming orders and projected manufacturing needs. Come ready to share your feedback on this tool that could help your business.

R&D: New Product Development
ProcessPro Global Users

Come discover how the R&D application can help with new product formulation, product costing, margin analysis, quoting, pilot batch tracking and formula integrity. In this session, we will explore the benefits of a sandboxed environment for product development that does not interfere with live production, highlighting how key product information, such as Bills of Material, Inventory Items, Costs and Quality Control, is seamlessly integrated.

Best Practices:
Recall Prevention in FDA Regulated Markets
ProcessPro Users

What can you learn from the most recent FDA recalls? In this course we will discuss recall trends and outbreaks and provide best practice recommendations and solutions that can help protect your company from a product recall. We will highlight what the trends indicate and how they can impact your future food safety initiatives.

Roundtable Discussion:
FSMA Updates and Compliance
ProcessPro Users

Are your cGMP's and Food Safety Plan in compliance with the FDA's recently implemented Preventive Controls for both Human and Animal Foods? Join this interactive discussion as we highlight recent FSMA updates and have attendees share their FSMA compliance experiences, including plant audits and inspections, paint points, and best practices.

Sales on the Go!
With TRAVERSE Sales Rep Portal
Traverse Users

Are you and your Sales Reps on the go from morning till night and lacking time to complete paperwork? If so, attend this class and discover a new way to keep your sales team...selling!

Sales Order Pricing

Learn the fundamentals to building custom pricing for sales orders using price structures, customer pricing, quantity breaks, and promotional pricing. Attendees will receive step-by-step instruction they can duplicate back in the office.

Scheduling: Are You Winning the Resource Battle?
ProcessPro Premier Users

ProcessPro Premier's production-oriented Advanced Scheduler and shipping and receiving focused Dock Scheduler help to organize your resources to ensure your deadlines are met, while accounting for changes in your manufacturing schedule and warehouse. In this class we will address the value of scheduling, how to set up a schedule, and common conflicts and resolutions.

Service Director - Managing Machines Using Service Orders
Traverse and Global Service Users

Learn to generate automatic service requirements for internal machine maintenance, track maintenance history, and link to the Fixed Assets application.

Service Director - Work Order Scheduling / Dispatching
Traverse and Global Service Users

In this session, we will focus on the latest scheduling, dispatching, and work order processing functions and work flows in the Service Director application.

Service Director - Setup and Use of Service Zones, Dispatchers and New Workflows
Traverse and Global Service Users

New to the Service Director application? Join us as we walk through setting up service zones, user defaults, billing types, dispatchers, and crews in the application. Attendees will walk away with a basic understanding of these functionalities.

Service Director - Introducing our New Mobile Service Tech App
Traverse and Global Service Users

Ready, set, go! We will demonstrate the next-gen mobile Service Tech app for smartphones and tablets. Join us as we walk through the on the go features and functionality of the solution.

Views Deep Dive: Interactive and Summary
Traverse Users

Have difficulty getting the exact report you need? Discover if utilizing the summary views can help! Come prepared to this interactive training to share examples of reporting needs for our experts to delve into.

System Maintenance - Technical Review
ProcessPro Premier Users

During this interactive course we'll investigate what happens when running System Manager maintenance routines. We encourage attendees to bring their scenarios and questions as we dive into the key functions in System Manager from Reindexing, Clearing Flags, Recalculating File Balances and Purging data. To get the most from this class we suggest system administrators and Controllers attend this course.

System Manager Imports: Let's Talk Mapping

In this technical class, we will take a deep-dive into setting up effective custom System Manager imports to automate processes and save time. This session requires some technical ability, as attendees will gain step-by-step mapping guidance.

Transitioning to ProcessPro Global
ProcessPro Premier Users

Considering the move to ProcessPro Global? Attend this session for an overview of the transition process from Premier to Global, including recommendations regarding infrastructure, data management and user training.

TRAVERSE API Powering: What's Ahead?

How will TRAVERSE API benefit me and my organization? This session will answer these questions and others by highlighting the features of TRAVERSE API, including a short demonstration.

Allocations: Find the Right One for You!

This session will cover the various allocation options available to you while also highlight the new General Ledger Periodic Allocations.

Banking Processes Covered

New this year! Everything you need to know about using the banking functionality, including how to set up ACH payment and positive pay, and building export layouts will be covered in this class.

TRAVERSE Costing Explained
Traverse Users

This session will give a detailed explanation of a COGS adjustment and why it occurred, as well as a PPV and why you may get one. You will also gain knowledge in "cost buckets" and how they work with costing methods, how to find / track costs in TRAVERSE, and how accruals functionality works.

TRAVERSE Customer Portal: Step up Your Customer Service
Traverse Users

Are you ready to step up your customer service game? We have the solution for you! Attend this session to learn how to serve your customers with an online self-service portal for order review, order entry, account management, and much more.

Open Systems Payment Service

New this year, learn how Open Systems' payment systems solution integrates basic and level 3 certified credit card processing, meeting PCI-compliance.

Upgrading your SQL Server

In this advanced interactive discussion, we will cover SQL support ending for obsolete versions, along with options for upgrading to a newer version and what it entails to upgrade. This session will be geared toward technical discussions.

ProcessPro Global User Feedback
ProcessPro Global Users

If you're currently utilizing ProcessPro Global, we want to hear from you! Join us in this interactive user feedback session.

User Defaults - How Can I Use Them?

This how-to session will provide helpful tips and shortcuts to setup your System Manager user defaults for faster and more accurate data entry.

ERP Health Check: Taking You To The Next Level

A utilization assessment helps gain the maximum return from your investment, provides your team a chance to review the software with fresh eyes, and make your entire team aware of tools you may not have realized were at your disposal. This session will discuss the utilization assessment experience and deliverables while also helping you decide whether the time is right for your organization.

Warehouse Management System

Attend this session to experience Global's mobile warehouse management solution. This session will cover the inventory transactions, such as receiving purchase orders and finished goods, picking transfers and orders and warehouse movements. Learn how to capture data using handheld devices throughout the warehouse from dock to dock, on a tablet, phone or scanner.

What's New in CRM?
Traverse Users

You've provided feedback, and we've listened! Now's your opportunity to see what new features we have recently added to the existing CRM application. We will walk through the various enhancements and how CRM can work for your business to transform managing contacts, campaigns, tradeshows, and mass mailings.

What's New In TRAVERSE Distribution
Traverse Users

Come see all of the newly added distribution-focused features within the TRAVERSE System.

Warehouse Management System - Paperless Back Office

Road to WMS success - attend this sessions to learn how the new back office features of the WMS solution can drive your warehouse floor and eliminate the paper trail, providing a real-time environment. Attendees will walk away with recommended practices for warehouse operations and transactions.

Understand SQL - Real-Life Scenarios

Ready, set, SQL! Returning as an advanced class, we invite technical administrators, IT professionals, and those knowledgeable in SQL to gain a better understanding about databases, tables, and rows, as well as value functions in this technical class. Anticipate to walk through examples and propose your scenarios.

Understanding Requirements Planning
Traverse Users

Enhance your efficiency! Learn how to plan your production and purchasing by factoring in real and forecasted demand within the solution and understand how Requirements Planning impacts the other applications in TRAVERSE.

General Tips and Tricks – AP/PO/IN Focus

New this year! Spend an hour with a team of OSI experts as they share their favorite tips and tricks with a focus on accounts payable, purchase order, and inventory.

General Tips and Tricks – AR/SO/SD Focus

New this year! Spend an hour with a team of OSI experts as they share their favorite tips and tricks with a focus on accounts receivable, sales order, and Service Director.

Month-End Best Practices: Accounting and Operational

In this session, we will provide users best practices and strategies for managing their accounting and operational month-end procedures.

MFG: Routing and Resources
Traverse Users

This unique course will tackle how to configure your Routing and Resources applications to better prepare your organization for MFG scheduling (future enhancement) and improve your bills of material costing.

Design Studio: Part 1

This interactive series is designed to help beginner and average Design Studio users simplify their use of the solution and take their usage to the next level.

Design Studio: Part 2

This interactive series is designed to help beginner and average Design Studio users simplify their use of the solution and take their usage to the next level.

Planning your Warehouse Management System Implementation

Are you ready to implement barcoding in your warehouse? Attend this class to learn the fundamental basics of device selection, printer availability, rack barcoding, and product labeling as we walk through the project plan and requirements for implementing WMS.

A Tour of OSAS Enhancements
OSAS Users

One of the great benefits of OSAS version 8 is the ability to leverage the continuous flow of enhancements provided when you stay current on your Software Maintenance subscription. With so many new enhancements, however, it can be easy to miss some along the way. In this breakout, we'll take a tour of some of the best of the enhancements we've added to OSAS version 8 so far!

Easy Access to Your Data Using Drill Downs in OSAS Version 8
OSAS Users

Discover the ways you can gain ready access to the data you value most. OSAS provides a plethora of options for drilling around your data. Whether from within inquiry functions, dashboard components, or Jasper reports, OSAS is making it easier and easier to find the data you need.

Enhanced Reporting with Jasper Reports
OSAS Users

The Jasper reporting engine in OSAS version 8 is a powerful tool that can be used to customize OSAS reports to better suit your business needs and even create your own reports. This class shows you how to make use of the free open source tools available to implement simple report changes that will make the OSAS reports unique to your business.

Java 11 and OpenJDK for OSAS Version 8
OSAS Users

OSAS version 8 has been architected on the Java platform since its release. This platform provides many benefits to OSAS users and will continue to be a solid platform as it progresses through its usual development cycles. Learn more about the new Oracle Java 11 platform, as well as a new platform option available to you, the open source OpenJDK platform. Find out what these options offer your business as we take the next step in the Java progression.

OSAS Dashboards and Drill Down
OSAS Users

OSAS Dashboards give you an easy way to keep your finger on the pulse of your business and now they are even better! The right-click menus in the dashboard components make it easy to see your key performance indicators in new formats, and they also provide you with easy access to the supporting data via the new drill-down capabilities.

OSAS Deep Dive: Payroll and Direct Deposit
OSAS Users

The OSAS Payroll and Direct Deposit applications provide a feature-rich environment for helping you get a grip on one of the most important aspects of your business: compensating your employees. New this year, we offer a deep dive into the OSAS functionality taking a closer look at several functional areas, Payroll and Direct Deposit, including the periodic reporting functionality, the direct deposit process, and the payday workflow.

OSAS Deep Dive: Banking and Bank Reconciliation
OSAS Users

If you are like most businesses, working with your bank is a critical part of your business processes. This new breakout takes a deeper dive into banking imports, reconciliation, credit card handling, ACH, positive pay, and more.

OSAS Expense Reporting Entry and Setup - Part 1
OSAS Users

The OSAS Accounts Payable and Purchase Order applications now contains Expense Reporting functionality that helps you enter, manage, and track employee expenses for reimbursement through new AP and PO functions. In this first of two breakouts, you'll learn about the general process flow, the entry of individual expenses, the creation of expense reports, and the setup required to make it all happen.

OSAS Expense Reporting Approvals, Management, and Reporting - Part 2
OSAS Users

The OSAS Accounts Payable and Purchase Order applications now contain Expense Reporting functionality that helps your organization enter, manage, track employee expenses for reimbursement through new AP and PO functions. In this second breakout, you'll learn about the management approval process, the accounting audit and posting processes, and the ways in which you can report on and drill into the historical information for future reference.

Stay on Top of Your Business with OSAS Info-Alert
OSAS Users

Join us as we examine ways to take advantage of the powerful alerting capabilities of Info-Alert when paired with your OSAS system. Attendees will learn how to connect to the many alerts that come preconfigured for OSAS, as well as how to use Info-Alerts scheduling and alert option features.

Tailoring OSAS for Individual Users
OSAS Users

Most businesses have several users who interact with OSAS on a daily basis and not everyone wants or needs to experience OSAS in exact same way. Learn about the many ways individual OSAS users can customize their OSAS experience to fit the way in which they do business.

Get to Know Impress Global: Overview
Impress Users

Attend this session for a product overview of Impress Global, our latest software release! This course will provide an overview of the Global solution, including the core applications and features, as well as the updated user interface and unique capabilities within the powerful application. We will also walk through the transition process and provide recommendations for upgrading your solution.

Creating Custom Reports in Impress
Impress Users

Are you looking for more visibility into the specific data needed to help make critical business decisions? Attend this session to learn how to utilize Report Builder and Report Writer to create custom reports. We will walk through how you can leverage our new Query Designer to really focus on important business metrics.

Streamline Purchasing with Impress' Supplier Integration
Impress Users

This session will discuss how you can integrate Impress directly with your most common suppliers for real-time inventory visibility. We will highlight how to electronically transmit Purchase Orders and automatically receive shipping acknowledgements. Attendees will walk away with insight into how to leverage the solution to streamline day-to-day activities.

Impress: Tips and Tricks from the Pros
Impress Users

New this year! Spend an hour with one of our Impress experts learning parts of the solution you probably didn't even know existed. We'll provide time saving tips, best practices, and expert tricks to help make you a more efficient user of Impress software.

Extending Your Accounting Solution for Impress Users
Impress Users

Have you outgrown your current accounting system? This session will discuss how you can leverage TRAVERSE, an Open Systems adaptable product, to support your current accounting processes, as well as grow with you into the future. The robust accounting solution is fully integrated to Impress - automating PO invoicing and AP payment posting without duplicate data entry. Attendees will gain a better understanding of the solution available to them, the seamless integration, and its capabilities.

Say What? Improve Communications with Smart Notes
Impress Users

Ready, set, go! We'll help you leverage Smart Notes and automated email capabilities within Impress to improve communication with your customers, vendors, and internal staff. Each attendee will be able to take actionable items back to the office to enhance their day-to-day communications.

Imports and Exports: Extending Your Use
Impress Users

Attend this session to spend an hour with one of our Impress experts reviewing all things import and export, including: capabilities, Impress XML, manual spreadsheet imports, automated spreadsheet imports, and application specific imports (SKU items and inventory transactions). We encourage attendees to bring their questions and scenarios to this class.

How To: Order Tracking Best Practices
Impress Users

Are you getting the most out of Order Tracking functionality in Impress? In this session, we will teach you how to use Order Tracking to maintain real-time visibility into the status of all your orders in the system. Our experts will provide best practices for setting up order tracking codes and utilizing them within your sales and production processes.

Production Management 101: Impress
Impress Users

Master the fundamentals of using the tools that Impress has to offer to help you manage your production processes. In this overview course, we will walk through a typical production run, scheduling artwork and jobs, recording production statistics, tracking scrap rates, reviewing capacities, and communicating job status. Attendees will have a better understanding of how to use the features in Impress to improve production management and be able to implement best practices in their environment.

A Connected Business System for the Win!
Impress Users

Impress seamlessly links with popular solution offerings to solve the everyday business needs of our users. Attend this session to find out all the different ways Impress is connecting systems with our Impress XML, third-party integrations, EDI solution, and Web Order Status. We encourage user feedback during this session to ensure our offerings continue to meet your needs.

An Integrated Warehouse with Impress WMS
Impress Users

Are you ready to streamline your warehouse operations and automate inventory transactions? Learn how Impress WMS can integrate your warehouse with handheld devices to streamline your receiving, stock picking, and inventory management processes, and provide you real-time transaction data.

Managing your Art Library
Impress Users

In this session, our experts will provide tips and tricks to efficiently manage your art library. Attendees will learn how to set up decorations with ink / embroidery detail to effectively provide the production team with the information they require to complete jobs, as well as, help catch exceptions up front before they become problems.

Job Cost Review
Master Users

Review it, before you bill it! Our team of experts will teach you how to analyze your jobs before invoicing. We will walk through scenarios to compare estimate to actual costs and dig into the details on the Estimate vs. Margins report. Attendees will be able to implement best practices for cost review and identify discrepancies.

Going Digital, Ditch the Printer
Master Users

This session will present strategies for removing unnecessary printing in your workflow. We will focus on efficient use and personalization of Job Cards, Interactive Views, Document Delivery, Document Archiving, and more to eliminate the waste of paper in your job shop.

Job Scheduling: Building the Foundation
Master Users

Back by popular demand, this session will cover the set-up and configuration of Job Scheduling. Learn how the correct set-up will allow you to get accurate information delivered, allowing you to make critical decisions quickly. Attendees will walk away with the fundamentals for effective use of the Job Scheduling application.

Job Scheduling: Real Life Processing Scenarios
Master Users

This session is a continuation of Job Scheduling: Building the Foundation. We will dig deeper and cover the how to's of managing your schedule using new and existing tools within the solution. Attendees will learn how to properly use Scheduling Views and Reports along with the new Scheduling Board for easy day-to-day workflow management.

What's New: TRAVERSE MASTER
Master Users

Join us for this exciting hour as we focus on the new features added to TRAVERSE MASTER since the 2018 Connect conference. Attendees will learn how to utilize new features to improve efficiencies from the front office to the shop floor. Global 11.2 features, enhanced communications between applications, planning boards, streamlined user interface, and much more!

Service Repair: Accounting and Material Management
Master Users

We will delve into the correct accounting set-up for TRAVERSE MASTER Service Repair and how it impacts the flow to General Ledger. Additionally, this session will cover the correct process for linking stock and non-stock purchases to the job as it relates to accounting.

The Next Gen: Mobilizing the Shop Floor and Field
Master Users

Ready to dramatically reduce duplicate work by capturing data directly on the shop floor or in the field? Using the new generation of mobile, we will walk through receiving jobs, completing inspection reports, taking pictures, consuming materials, tracking time and more. This session will be useful for new and experienced mobile users.

Service Repair: Job Processing and Planning Boards
Master Users

Let's dig deeper on how to better utilize TRAVERSE MASTER Service Repair. From estimating to reporting and presentation of information, this class will help you become a more productive and efficient user of the solution. As well, we will explore how to effectively use the planning boards to manage day-to-day operations.

Let's Go Mobile!
Master Users

Ready to up your ante? Learn how to dramatically reduce duplicate work by capturing data directly on the shop floor or in the field. We will walk through real-life scenarios of receiving jobs, completing inspection reports, taking pictures, consuming materials, tracking time and more, using the new generation of TRAVERSE MASTER'S mobile offering.

Mobile Configurations and Reporting Restructured
Master Users

Whether you are just starting to utilize the mobile functionality or you have been taking advantage of mobile Quality Assurance for months, this course will offer takeaways for everyone! Attendees will learn how to efficiently use the new configurator and reporting enhancements to easily build out inspections and streamline the QA process.