

BREAKOUT SCHEDULE



TUESDAY SEPT. 10TH

1:00 – 2:15pm

General Session
Milan Ballroom ●

2:30 – 3:00pm

Traverse Solution Keynote
Milan 1 & 2 ●

ProcessPro Solution Keynote
Milan 4 & 5 ●●

Master Solution Keynote
Marche 1 ●

Impress Solution Keynote
Marche 2 ●

OSAS Solution Keynote
Marche 3 ●

3:15 – 4:15pm

Customer Portal: Going Beyond the Sales Order
Molise 4 & 5 ●●●

General Ledger vs. Subsidiary: Who's Winning the Battle
Modena 1 ●●●

Document Delivery and Archiving with System Manager
Modena 2 ●●●

Optimizing Your Order to Pay Process
Modena 3 ●●●

R&D Application
Marche 1 ●

MRP - How to Setup Your Data
Marche 2 ●

How Do I? Common Support Questions for ProcessPro Premier
Marche 3 ●

What's New: Traverse Master
Messina 1 ●

A Connected Business System for the Win!
Messina 2 ●

OSAS Dashboards and Drill Down
Messina 3 ●

Service Director - Setup and Use of Service Zones, Defaults, Dispatchers and Other Global Service Features
Messina 4 ●

Quality for Open Systems by uniPoint: Total Enterprise Quality Management Solution
Messina 5 ●

4:30 – 5:30pm

General Tips and Tricks – AP/PO/IN Focus
Molise 4 & 5 ●●●

General System Maintenance: The Do's and Don'ts
Modena 1 ●

Imports: How and When is This the Right Answer?
Modena 2 ●●●

API Powering: What's Ahead?
Modena 3 ●●●

ProcessPro Global User Feedback
Marche 1 ●

Let's Dig In: Transformation of Item Costs
Marche 2 ●

System Maintenance - Technical Review
Marche 3 ●

Job Scheduling: Building the Foundation
Messina 1 ●

Get to Know Impress Global: Overview
Messina 2 ●

Stay on Top of Your Business with OSAS Info-Alert
Messina 3 ●

Service Director - Introducing our New Mobile Service Tech App
Messina 4 ●

Connecting Your Business Operations Through EDI by TrueCommerce
Messina 5 ●

PRODUCT LINE KEY:

● Traverse ● ProcessPro Global ● OSAS ● Preferred Vendor
● Master ● ProcessPro Premier ● Impress ● General Conference

BREAKOUT SCHEDULE



WEDNESDAY SEPT. 11TH — MORNING

8:30 – 9:30am

Reconciling Inventory: Stop the Bleeding!

Molise 4 & 5 ●●●●

MFG: Routing and Resources and Production Scheduler

Modena 1 ●●

OK, I Linked It...Now What?

Modena 2 ●●●●

Planning Your Warehouse Management System Implementation

Modena 3 ●●

Navigation and Personalization

Marche 1 ●●●●

Best Practices: Recall Prevention in FDA Regulated Markets

Marche 2 ●●

Manipulating Your Data in Excel Part 1

Marche 3 ●

The Next Gen: Mobilizing the Shop Floor Field

Messina 1 ●

Extending Your Accounting Solution for Impress Users

Messina 2 ●

A Tour of OSAS Enhancements

Messina 3 ●

Service Director: Work Order Processing and Dispatch Scheduling

Messina 4 ●

9:45 – 10:45am

Month-End Best Practices: Accounting and Operational

Molise 4 & 5 ●●●●

Understanding Requirements Planning

Modena 1 ●●

Allocations: Find the Right One for You!

Modena 2 ●●●●

Advanced Design Studio In Action

Modena 3 ●●●●

Get to Know ProcessPro Global: Extended Features

Marche 1 ●●

MRP - Utilizing the Buyer / Planner Tool

Marche 2 ●

Manipulating Your Data in Excel Part 2

Marche 3 ●

Mobile Configurations and Reporting Restructured

Messina 1 ●

Production Management 101: Impress

Messina 2 ●

OSAS Expense Reporting Entry and Setup - Part 1

Messina 3 ●

DocUnity Workflow and Integrated Document Management for Traverse v.11 and Traverse Global

Messina 5 ●

11:00 – Noon

Design Studio: Part 1

Molise 4 & 5 ●●●●

Banking Processes Covered

Modena 1 ●●●●

Views 101: Interactive and Summary

Modena 2 ●●●●

A New Look at CRM?

Modena 3 ●●●●

Requirements Planning

Marche 1 ●

Best Practices: Labeling

Marche 2 ●●

Best Practices: Financial Reporting

Marche 3 ●

Service Repair: Accounting and Material Management

Messina 1 ●

How To: Order Tracking Best Practices

Messina 2 ●

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

Messina 3 ●

DocUnity Workflow and Integrated Document Management for ProcessPro and ProcessPro Global

Messina 5 ●

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BREAKOUT SCHEDULE



WEDNESDAY SEPT. 11TH — AFTERNOON

1:00 – 2:00pm

Design Studio: Part 2
Molise 4 & 5 ●●●●

Get to Know Advanced Analytics
Modena 1 ●●●●

General Ledger: Building Financial Reports
Modena 2 ●●●●

Upgrading Your SQL Server
Modena 3 ●●●●

Production Management
Marche 1 ●

Let's Dig In: Bank Reconciliation Woes
Marche 2 ●

Streamlining Quality Control
Marche 3 ●

Job Cost Review
Messina 1 ●

Imports and Exports: Extending Your Use
Messina 2 ●

Easy Access to Your Data Using Drill Downs in OSAS Version 8
Messina 3 ●

Service Director - Managing Machines Using Service Orders
Messina 4 ●●●●

Avalara: The State of Sales Tax and Remote Selling: A Year+ After the South Dakota v. Wayfair, Inc. Ruling
Messina 5 ●

2:15 – 3:15pm

PO Routing and Approval - Get Control of Your Spending!
Molise 4 & 5 ●●●●

Warehouse Management System - Mobile
Modena 1 ●●●●

ERP Health Check: Taking You to the Next Level
Modena 2 ●●●●

Sales Order Pricing
Modena 3 ●●●●

What's New in Traverse Global 11.2?
Marche 1 ●●

Solution Overview: CBD, Hemp, and the Cannabis Industry with ProcessPro
Marche 2 ●●

Let's Dig In: Purchase Order Through Accounts Payable
Marche 3 ●

Managing Your Art Library
Messina 1 ●

Streamline Purchasing with Impress' Supplier Integration
Messina 2 ●

Enhanced Reporting with Jasper Reports
Messina 3 ●

Purchase Order: The Reorder Process
Messina 4 ●●●●

3:30 – 4:30pm

General Tips and Tricks - AR/SO Focus
Molise 4 & 5 ●●●●

Bank Rec: Managing Non-AP/AR Entries
Modena 1 ●●●●

Cash Flow! It's Just Another GL Statement...
Modena 2 ●●●●

Advanced Analytics for Report Designers
Modena 3 ●●●●

Get to Know ProcessPro Global: Overview
Marche 1 ●●

Best Practices: Maintenance and Month-End Procedures
Marche 3 ●

Job Scheduling: Real Life Processing Scenarios
Messina 1 ●

Say What? Improve Communications with Smart Notes
Messina 2 ●

OSAS Deep Dive: Payroll and Direct Deposit
Messina 3 ●

An Introduction to Mobile Delivery for ProcessPro Global
Messina 5 ●

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BREAKOUT SCHEDULE



THURSDAY SEPT. 12TH

8:30 – 9:30am

Warehouse Management System - Back Office

Molise 4 & 5 ●●●

Get to Know Forecasting + Advanced Analytics

Modena 1 ●●●●

Project Costing: Selecting the Right Project Type

Modena 2 ●●●

Payroll: Exploring Leave Codes and Automatic Accruals

Modena 3 ●●●

BOM and Item Maintenance

Marche 1 ●

Advanced Analytics: Utilization, Tips and Tricks

Marche 2 ●●●●

Finding Your Data

Marche 3 ●

Going Digital, Ditch the Printer

Messina 1 ●

Impress: Tips and Tricks from the Pros

Messina 2 ●

OSAS Deep Dive: Banking and Bank Reconciliation

Messina 3 ●

Tax Integration: The Avalara Experience

Messina 4 ●●

9:45 – 10:45am

Open Systems' Payment Systems

Molise 4 & 5 ●●●

Understand SQL - Real-Life Scenarios

Modena 1 ●●●

Managing Your Most Important Human Resources

Modena 2 ●●●

Reconciling and Managing Purchase Order Deposits

Modena 3 ●●●

Streamlining the Order to Cash Process

Marche 1 ●

Quality Control

Marche 2 ●

Let's Dig In: Balancing Accounts

Marche 3 ●

Service Repair: Job Processing and Planning Boards

Messina 1 ●

Creating Custom Reports in Impress

Messina 2 ●

Java 11 and OpenJDK for OSAS Version 8

Messina 3 ●

11:00 – Noon

Sales on the Go! With Traverse Sales Rep Portal

Molise 4 & 5 ●●

Did You Know? Sales Order Capabilities Edition

Modena 1 ●●●

Info Alert: Scheduling and Planning

Modena 2 ●●●●

Roundtable Discussion: FSMA Updates and Compliance

Marche 1 ●●

Transitioning to ProcessPro Global

Marche 2 ●

MRP - Deep Dive

Marche 3 ●

An Integrated Warehouse with Impress WMS

Messina 2 ●

Tailoring OSAS for Individual Users

Messina 3 ●

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