

Session Descriptions

ACCOUNTING TRACK

Accounting Flow: Sub-ledger Account Defaults

Correct default accounts in your sub-ledger configuration are critical to accurate and meaningful financial reporting. If not properly configured, sub-ledgers can become out of balance with the General Ledger, and inquiries and management reports can quickly become less valuable to the organization. This session will review the Inventory Control and Accounts Receivable default accounts, perform sample transactions, and review the results of typical day-to-day business transactions including inventory adjustments, batch ticket posting, and shipping. The session will also review ways in which the sub-ledgers could become out of balance with the General Ledger, and steps you can perform to identify and resolve the out of balance condition.



Hands-on Sessions



New this year, we are offering hands-on training sessions where you can work in a live environment. Get the most out of your conference experience! Class sizes are limited and pre-registration is required.*



Business Controls: Security and Workflow (Hands-on Session*)

This session will focus on both newly added and previously available functionality to control transactions and user activity in the software. Topics include a brief review of security privileges in ProcessPro® Premier and how they can be used to put "checks and balances" on transaction activity and new Routing and Approval workflow configurations available for selected Purchase Order and Sales Order transactions. The class will finish up with a review of new Customer/Vendor payment netting functionality as an alternative to separate Receivables and Payables transactions.

Financial Reporting

Financial statements are commonly used to communicate the 'state of the business' to many different audiences (executive staff, line management, bankers/investors, etc.) Challenges arise as each group concentrates on a different level of detail. Learn how to use option grid settings and Account Types and Subtypes configuration to produce financial statements that cater to different audiences. Budgets will also be incorporated into the session along with a third-party financial reporting tool, F9, which integrates with Excel for a multitude of reporting options.

Manufacturing Costing

This class will cover landed cost, cost roll up, average and standard costing features and functionality. Learn how this solution quickly and easily transforms data in your company's database into a profitability analysis that can be used to make more informed strategic business decisions.

Project Accounting

ProcessPro® Premier Project Accounting is a fast, flexible budgeting and accounting tool for job/project cost management. Project Accounting provides detailed reports of all job-related costs so you can monitor your job's progress, and budget for future jobs. This session will review the configuration decisions and process transactions demonstrating how Project Accounting can help you better understand project costs.

Sales Commission Contracts

ProcessPro® Premier's new Commission Contracts functionality gives you a new set of tools to be able to calculate sales commissions in a much more flexible and powerful way. This session will walk through the setup and configuration steps and discuss the options available when creating commission contracts. We will also review the hierarchy and approach to assigning items and sales people to those contracts.

OPERATIONS/PRODUCTION TRACK:

Manufacturing Data Setup & Impacts

Understand data set-up options and impacts including: routes, batch sizes, work centers, Bill of Materials, Bill of Material levels, BOM versions, Revision Control, use of phantoms, and Work Order/Batch Ticket settings and creation, planning and maintenance. Discuss various manufacturing scenarios and possible approaches. This course will be both lecture and Q & A.

Manufacturing Planning & Forecasting

This session will take a detailed look at the **New** MRP planning tool & Demand Supply Report. We will also look at utilizing the forecasting tool to populate the New Master Production Schedule (MPS) and how it works with MRP generation. Learn how to use the scheduling features to efficiently manage production and labor needs.

Utilizing Quality Control (QC)

Due to cGMP and other quality regulations, QC is a necessity for most process manufacturers. QC is easy to use and has the flexibility needed for in-process and customer-specific testing, yet many clients underutilize the program. This session will demonstrate how to set up QC: define test ranges and target values, transfer expired inventory directly to a quarantine status, assign default QC status at the item level, and other QC features to help your operations work more smoothly.

R&D / Batch Ticket Scheduler

The biggest advantage of the R&D application is its ability to allow for product development within ProcessPro without interfering with current production data. Learn how R&D will provide Pilot Batch Tracking and generate quotes. See how new formulas can easily be copied from R&D to live production. Item information, including cost, is automatically updated in R&D as the item master information is created. Learn more ways R&D can make new product development more efficient.

The Advanced Scheduler application makes production scheduling simple and easy to understand. See the exceptionally user-friendly features, such as: batch ticket color coding, drag and drop features, allergen information, easy set up, viewing, and changes. This session will also demonstrate the ability to view/edit the batch ticket details directly from the scheduling screen, how to schedule machine downtime, identifying Batch tickets with shortages and other helpful report features.

Best Practices: Bills-of-Material & MRP

To effectively use a Material Requirements Planning (MRP) system, it is essential to understand how Bills of Material (BOMs) are structured and how MRP calculates requirements. This workshop includes instruction and exercises so class attendees can practice these important concepts. From structuring simple BOMs to creating phantom bills, modular bills, and super bills, the participant will learn many ways to use Bills of Material, how to calculate material requirements, and some common action/exception messages that many traditional MRP systems include. *(Participant guides/workbooks will be provided.) (Repeat of 2009 session)*

Best Practices: Prepare/Conduct a Cycle Count

Participants will learn how to implement, or improve, a cycle count program, and the real purpose for cycle counting: finding and fixing causes of inventory errors. Included are several methods for selecting items to count, using correct accounting techniques, and reconciling any outstanding transactions. In addition, participants will learn various methods to report results of the cycle counting program to employees and management. *(Participant guides/workbooks will be provided.) (Repeat of 2009 Session)*

Warehouse Solutions

This class will highlight how AWS, pallet tracking and dock scheduling can be utilized to enhance your business. Pallet tracking and dock scheduling are brand new features in ProcessPro® Premier. This enhanced functionality will allow you to better manage your warehouse. Following the presentation, this session will allow attendees to review the concepts, presented in the session, in a live environment.

GENERAL TRACK

Microsoft Excel: Tips & Tricks

In this class you'll learn tips and tricks for using Excel™ with ProcessPro® software's new MRP Demand Supply Report. Additionally, you'll learn how to interpret the report, which can generate and list several items such as: Sales Orders, Batch Tickets, Order Points, etc...

Validation 101

Software validation is required by any company covered by the Food, Drug and Cosmetic Act and 21 CFR Parts 210 & 211. For some companies, this can seem like an overwhelming task and many choose to take the risk and not validate their systems. However, the benefits of validating are proving to be well worth the investment. Attend this session to better understand software validation and key elements and benefits to implementing it in your organization.

EDI 101

It is becoming more common for corporations to only conduct business with companies that utilize an EDI system. Companies that have opted to use this tool are finding that they are able to work with others that they have been unable to work within the past. This opens the doors to new possibilities and revenues for growing companies. A basic and advanced class will be given providing EDI concepts, set-up, transactions, and EDI transaction interaction with ProcessPro® software.

Planning Your Upgrade & Implementation

Get the most out of your upgrade with proper planning and execution. Understand the steps involved to make the upgrade process as seamless as possible to the organization and end users while maximizing the benefits of the software updates and the process itself. Understand the pitfalls of not following the suggested process.

What's New in Sage CRM v7

The new look and feel of Sage CRM v7 makes it easier to use and offers greater choice of interface designs, delivering greater personalization options and helping drive user adoption across the organization. The interactive dashboard enables users to manage their activities and tasks and display web and RSS feeds from a single workspace. In this session, you will learn about these new features and other enhancements such as Active Directory import and the new SData provider.

Sage CRM – Codeless Customization Techniques

After participating in this session, you will be able to get the most out of SageCRM without needing to write a line of code. We'll cover examples using codeless customization to add fields to screens and control access to Tab Groups, Menus & Button Groups as well as working with simple Workflow scenarios.

Management Reporting Tools

Come see the powerful, interactive business analysis solution, ProcessPro® Business Analytics. Learn how to solve the frustration felt by business managers and decision-makers over the speed, cost, and complexity of viewing and analyzing business data. This session will demonstrate Business Analytics and answer questions for existing users.

Navigating ProcessPro More Efficiently

After this course, you will be able to navigate the system with Mouse and Keyboard shortcuts more quickly. You will be able to personalize your ProcessPro® Premier desktop with 'Favorites', 'Task Lists', and 'Clipboard' options as well. Using sample data, we will review several key screens and reports, and provide tips on viewing and exporting reports.

TECHNICAL TRACK



Data Dictionary & Datadriller (Hands-on Session*)

Learn where information is stored for common screens and how to build queries against the data. The class will cover entering Sales Orders, Invoices, Purchase Orders, Batch Tickets, Bills of Material, Shipping of Sales Orders, Receipts of Purchase Orders, Posting of Batch Tickets and archiving to history. At the end, the user should have knowledge of table and field names with relationships between the various screens and transactions and the knowledge to be able to pull data from them.



Customize & Build Your Own Reports (Hands-on Session*)

This class will help you to bring reporting to a higher level. We will touch on customizing ProcessPro® software current reports using customization manager, and creating your own reports using Crystal and Excel.



Customizing Screens (Hands-on Session*)

Learn how to add new information to your screens, hide information from certain users, change the look and feel of your screens, and more.

ProcessPro® Premier Infrastructure Planning and System Maintenance Recommendations

This class will discuss infrastructure recommendations for implementing ProcessPro Premier 10. This will include discussing the advantages of using a server-based computing environment (Terminal Services and Citrix), server sizing recommendations, SQL server backup, maintenance, and optimizations.

FULL GROUP PRESENTATIONS

Reflections of the Past Year – Product features now available.

ProcessPro Product Manager Shanon Odegaard will present all the latest features, tools and functionality that we've added to ProcessPro® Premier.

Roadmap for the Future

Hear from the ProcessPro Executive Team to gain insight to what lies ahead for the product and the company.

ProcessPro Client Support & Training

ProcessPro has restructured the way we provide support and training to our clients. Meet the friendly faces and familiar voices behind the scenes, and learn all this team has to offer.



***All Hands-on sessions will require the attendee to bring his/her own wireless enabled laptop. Class sizes will be limited to 10 individuals. Pre-registration for these classes is required.**

All classes and content subject to change/cancellations

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