



2nd Annual **Synergy Resources** **VISUAL User Conference**

October 25 - 28, 2009
Providence Marriott Downtown
Providence, RI



Agenda **and** **Session** **Descriptions**

- Preliminary -

Conference Overview

Sunday, October 25

Conference Registration	11:30am - 6:00pm
Concurrent Sessions	2:30pm - 5:15pm
Welcome Reception	6:00pm - 8:00pm

Monday, October 26

Breakfast	7:30am - 8:00am
Keynote Address	8:00am - 9:30am
Solution Center	9:45am - 5:15pm
Concurrent Sessions	9:45am - 12:00pm
Lunch	12:00pm - 1:15pm
Concurrent Sessions	1:15pm - 5:30pm
Open Evening	

Tuesday, October 27

Breakfast	7:30am - 8:30am
Solution Center	8:30am - 5:15pm
Concurrent Sessions	8:30am - 12:00pm
Lunch	12:00pm - 1:15pm
Concurrent Sessions	1:15pm - 5:15pm
Off-Site Evening Event	7:00pm - 10:00pm

Wednesday, October 28

Breakfast and Closing Remarks	7:30am - 9:00am
Solution Center	9:00am - 11:30am
Concurrent Sessions	9:15am - 12:00pm
Conference Conclusion	12:00pm

Conference Schedule

Sunday, October 25

2:30PM - 3:30PM

M01: Management Reporting Workshop - This session will illustrate how easy it is to set up user or role specific business intelligence dashboards that access information within VISUAL to help you see what is happening at all times relative to key areas of business performance, from sales to customer service.

F05: Accepting Credit Card Payments with VISUAL - Whether you use Standard VISUAL Financials, or Global Financials, you can easily accept Credit Card transactions. This session will examine where credit card transactions have been integrated for faster payment of your customer invoices.

T01: Introduction to Automating Tasks using Macros - This session will introduce you to the concepts of automating tasks that can be leveraged by multiple VISUAL users. Users can now share macros that can automate repetitive and time consuming tasks, as well as input, output, or modify data in selected VISUAL windows.

3:30PM - 3:45PM

Break

3:45PM - 5:15PM

M03: Business Process Improvement Workshop - This workshop will help you begin to reassess your business processes and procedures across your company. Each participant will evaluate their current business practices and begin to formulate an action plan to improve their operational efficiency.

F06: Streamlining your Order to Cash Process - Learn how to tune your business practices along with VISUAL tips and techniques to increase your order to cash throughput. Get an in-depth view of the cash management process and VISUAL specific functionality.

T06: Rename and Merge - Have you ever wanted to change part numbering schemes, rename parts for production, or consolidate duplicate part ID's? The rename and merge facility is the only database utility which allows you to Rename and Merge ID's within a live database while maintaining data integrity.

6:00PM - 8:00PM

Evening Reception

Monday, October 26

7:30AM - 8:00AM

Breakfast

8:00AM - 9:30AM

Keynote Opening Session

9:45AM - 5:15PM

Solution Center

9:45AM - 10:45AM

M02: Creating user and role specific views using VISUAL MYDay VISUAL MyDay is the latest example of how VISUAL is continuing to evolve to help you improve your performance within each department. Learn how to set up MyDay portal pages that allow you to establish Role-Based home pages that can deliver the metrics, tools and resources that apply to each specific user or role in your organization.

Monday, October 26

9:45AM - 10:45AM

M06: Managing Quality Non-Conformance - Attend this tutorial on managing out-of-conformance Quality exceptions, from detection of issues to the assignment and tracking of corrective actions. This workshop steps you through the process of correcting quality issues before they can adversely impact your bottom line.

M11: Creating Web Portals for Customer Self Service - Learn how you can establish a web-based portal for eBusiness transactions and a customer self-service repository. This workshop will outline the steps to creating an e-business portal.

F01: Financial Statement Workshop - Learn about all of the report writing tools that can help you simplify the process of creating financial statements. Participants will walk away with a new perspective on how to generate meaningful financial reports and budgets using a variety of VISUAL tools.

T02: Simplify your System Administration with VE Scripts - This session will show you how you can configure and maintain a consistent user experience and interface across all computers throughout your organization. Allowing you to improve and simplify your system administration tasks by centrally storing and managing all client configuration updates, user licenses, file storage locations and user preferences.

10:45AM - 11:00AM

Break

11:00AM - 12:00PM

M05: Graphical Web Configur8or - Learn how to accurately customize and configure your products and create customized quotes and customer orders. This session will walk through the process of setting up configure-to-order product relationships and rules, and how to create quotes and orders that can be assembled using a web-based interface.

M08: EDI Solutions with DCS - Businesses can benefit from automating their customer and vendor ordering procedures through established EDI trading partner relationships. By streamlining and automating your order transactions, acknowledgements, order changes, you can effectively avoid making costly, last minute changes and expedited shipments.

M09: Is Lean Scheduling right for my organization - This session will review the different scheduling options, and provide guidance on which options apply to the different styles of manufacturing production. Pluses and minuses of Finite Scheduling versus Lean (Federal Electronics case study). Helping the purchasing mindset understand the benefits of making the change from MRP planning to Lean Scheduling.

F03: Introduction to Cost Accounting in VISUAL - This workshop covers how costs flow throughout the system and subsequently into the general ledger. Users will gain a better understanding of the impact of cost data in the system and how to leverage that data for improved cost analysis and management.

T03: Automate your Standard Reports - Learn how you can spend more time analyzing and evaluating your report data, through automated techniques that can simplify the process of deploying your daily, weekly and monthly reports using the report scheduler and launcher module.

Monday, October 26

12:00PM - 1:15PM

Lunch

1:15PM - 2:45PM

M12: Putting VISUAL to work with Workflow - Learn how easily you can define Workflow processes that can be used to increase the speed and accuracy of transaction flow in your organization. This workshop will provide several common examples of workflows that can help you tailor VISUAL to meet your business process needs.

M15: A Lean Scheduling Workshop - This workshop will provide an in-depth step by step process of how Lean Scheduling simplifies shop floor activities, freeing up capacity for more work, so you can increase your throughput and drastically shorten your lead times.

M18: Developing a customer service strategy using CRM - Learn how you can improve your customer service resource management and ability to track service requests using CRM.

F02: Understanding the Elements of Month End Closing - Performing month end closing can pose challenges for even the most experienced users. Learn the proper procedures, steps, and transactions that make a successful month end closing a fast and easy process.

T07: Macro Development Workshop – Learn how to develop macros using the VISUAL Macro Server (a free software component).

2:45PM - 3:15PM

Break

3:15PM - 4:15PM

M10: Best Practices in Labor and Material Tracking - Improving the accuracy, reliability, and quality of your labor and material tracking processes can help you improve customer service and reduce costs throughout your company. Learn what every manufacturer can do to improve their inventory accuracy and minimize costly rework.

M13: Manufacturing Window - As the soul of VISUAL Enterprise learn how recent enhancements to the Manufacturing Window allow for improved visibility across your manufacturing environment. This session will demonstrate how the Manufacturing Window continues to evolve and improve your ability to plan, schedule and streamline shop floor activity.

M14: A Lean Case Study - Everyone is talking about Lean Manufacturing, but how can I get started without taking unnecessary risks? Graphicast's President will present the process his company went through in switching to a lean manufacturing philosophy. Learn what unexpected benefits were realized in the process, and how quickly those benefits can be realized.

F07: Simplify the process of applying Sales Tax - Learn how your company can stay current with tax rate tables and automatically upload and update this critical data in your VISUAL accounting system. Combined with Avalara LaserBridge+ sales and use tax forms and TrustFile e-filing and e-payment solutions, you can also close the loop on the entire returns and remittance process.

T08: Visual Integration with Synergy Business Objects – This session will identify and demonstrate the tools and API's available to integrate external applications with VISUAL.

4:15PM - 4:30PM

Break

Monday, October 26

4:30PM - 5:30PM

M19: Leveraging VISUAL Quality as a Strategic Capability - Learn how improved quality management can help to reduce costs, improve time to market, and contribute to profitability.

M21: Shipper Connector and Beyond - Integrate your shipment process - Eliminate the manual entry of shipping information between VISUAL and your shipping solution. Learn how you can easily transfer tracking numbers, shipment costs, shipping weights, and other information in UPS WorldShip. Using this tool, you can track shipments directly from VISUAL

M22: Lot Traceability as a Strategic Capability – Learn how companies are using Lot Trace to manage their supply chain and customer service capability.

F05: Accepting Credit Card Payments with VISUAL - Whether you use Standard VISUAL Financials, or Global Financials, you can easily accept Credit Card transactions. This session will examine where credit card transactions have been integrated for faster payment of your customer invoices.

T05: Tailoring my VISUAL system with industry specific terminology
How can I make changes to the fields and field labels so that the system is easier for my staff to understand and use? Tools such as Windows Editor can be used, but when should it be used and how should it be used to make these changes safely?

5:30PM

Open Evening

Tuesday, October 27

7:30AM - 8:30AM

Breakfast

8:30AM - 5:15PM

Solution Center

8:30AM - 10:00AM

M03: Business Process Improvement Workshop - This workshop will help you begin to reassess your business processes and procedures across your company. Each participant will evaluate their current business practices and begin to formulate an action plan to improve their operational efficiency.

M15: A Lean Scheduling Workshop - This workshop will provide an in-depth step by step process of how Lean Scheduling simplifies shop floor activities, freeing up capacity for more work, so you can increase your throughput and drastically shorten your lead times.

M23: Maintaining Transactional Discipline and Data Integrity from an Operations Point of View - Timely inventory and labor transactions, Cycle Counting, Daily Exception reporting resulting in Work Order Mgmt. and Auditing contribute to accurate Inventory and WIP balances. The net result is a verifiable financials. Topics such as: When to use Labor back-flush; Auto-issue and Alternate Resource labor charging will be discussed.

F04: Advanced Cost Accounting - This session is ideal for VISUAL users familiar with the basics of VISUAL Cost Accounting features, but are looking for more tools and tips for resolving costing issues. Includes reporting, sample scripting, and table configuration discussions.

T08: Visual Integration with Synergy Business Objects – This session will identify and demonstrate the tools and API's available to integrate external applications with VISUAL.

10:00AM - 10:30AM

Break

Tuesday, October 27

10:30AM - 12:00PM

M07: Infor ERP VISUAL Product Roadmap - Gain insight into the latest VISUAL development schedule and roadmap, including new features and solutions in newly released and upcoming versions of VISUAL that may answer some of your outstanding questions relative to your VISUAL implementation.

M12: Putting VISUAL to work with Workflow - Learn how easily you can define Workflow processes that can be used to increase the speed and accuracy of transaction flow in your organization. This workshop will provide several common examples of workflows that can help you tailor VISUAL to meet your business process needs.

F09: Multi-Plant Alternatives – Explore the variety of options for managing purchasing, inventory control, and order management across multiple facilities, along with centralized financial reporting options.

F11: KPIs to Help You Keep Your Eye on the Ball – This session covers the process for defining top down business metrics to improve business performance. Once an organization has analyzed its mission, identified all its stakeholders, and defined its goals, it needs a way to measure progress toward those goals. Key Performance Indicators (KPIs) are those measurements.

T02: Simplify your System Administration with VE Scripts - This session will show you how you can configure and maintain a consistent user experience and interface across all computers throughout your organization. Allowing you to improve and simplify your system administration tasks by centrally storing and managing all client configuration updates, user licenses, file storage locations and user preferences.

12:00PM - 1:15PM

Lunch

1:15PM - 2:15PM

M17: Improving Your Procurement Process - Learn the latest best practices and VISUAL features to simplify and reduce the cost of your purchasing activities. See all the latest procurement capabilities in the new Purchasing workbench delivered in Release 6.5.3.

M20: Strategies and Approaches to Handling Engineering Change Notices - This session will explore and demonstrate the VISUAL toolsets that are available to support progressive ways to track and manage your engineering revisions and associated product documents.

M14: A Lean Case Study - Everyone is talking about Lean Manufacturing, but how can I get started without taking unnecessary risks? Graphicast's President will present the process his company went through in switching to a lean manufacturing philosophy. Learn what unexpected benefits were realized in the process, and how quickly those benefits can be realized.

M07: Infor ERP VISUAL Product Roadmap - Gain insight into the latest VISUAL development schedule and roadmap, including new features and solutions in newly released and upcoming versions of VISUAL that may answer some of your outstanding questions relative to your VISUAL implementation.

T04: Database Administration Tips and Technique Roundtable - This session will explore some helpful tips and techniques to enable user to keep their Database running at peak performance, and to minimize unnecessary down time, with a focus on addressing user specific questions.

2:15PM - 2:45PM

Break

Tuesday, October 27

2:45PM - 3:45PM

M04: Managing Job Priorities with the Priority Manager module - Join this informative session that provides step by step direction on how job priorities can be flexibly changed. Using the Priority Manager module, you will learn how you can effectively change job sequencing to meet changing customer requirements and demands.

M02: Creating user and role specific views using VISUAL MYDay
VISUAL MyDay is the latest example of how VISUAL is continuing to evolve to help you improve your performance within each department. Learn how to set up MyDay portal pages that allow you to establish Role-Based home pages that can deliver the metrics, tools and resources that apply to each specific user or role in your organization.

F10: Consignment Inventory – How does your company deal with consignment inventory? Learn the various option that can help you more accurately manage your consignment inventory transactions.

F08: Implementing Time & Attendance - Learn about the features and capabilities of this powerful workforce management application, including: Bar code and paper-less features and Accrual reporting. Also learn about the keys to success during a Time & Attendance implementation process.

T06: Rename and Merge - Have you ever wanted to change part numbering schemes, rename parts for production, or consolidate duplicate part ID's? The rename and merge facility is the only database utility which allows you to Rename and Merge ID's within a live database while maintaining data integrity.

3:45PM - 4:15PM

Break

4:15PM - 5:15PM

M16: VISUAL Product Direction Round table - Join this interactive discussion with Synergy Resources and Infor management to discuss product direction as well as enhancement ideas/requests.

7:00PM - 10:00PM

Evening Event at Dave & Busters

Wednesday, October 28

7:30AM - 9:00AM

Breakfast (Closing Presentation)

9:00AM - 11:30AM

Solution Center

9:15AM - 10:45AM

F04: Advanced Cost Accounting - This session is ideal for VISUAL users familiar with the basics of VISUAL Cost Accounting features, but are looking for more tools and tips for resolving costing issues. Includes reporting, sample scripting, and table configuration discussions.

F02: Understanding the Elements of Month End Closing - Performing month end closing can pose challenges for even the most experienced users. Learn the proper procedures, steps, and transactions that make a successful month end closing a fast and easy process.

Wednesday, October 28

9:15AM - 10:45AM

F11: KPIs to Help You Keep Your Eye on the Ball – This session covers the process for defining top down business metrics to improve business performance. Once an organization has analyzed its mission, identified all its stakeholders, and defined its goals, it needs a way to measure progress toward those goals. Key Performance Indicators (KPIs) are those measurements.

F09: Multi-Plant Alternatives – Explore the variety of options for managing purchasing, inventory control, and order management across multiple facilities, along with centralized financial reporting options.

T07: Macro Development Workshop – Learn how to develop macros using the VISUAL Macro Server (a free software component).

10:45AM - 11:00AM

Break

11:00AM - 12:00PM

M19: Leveraging VISUAL Quality as a Strategic Capability - Learn how improved quality management can help to reduce costs, improve time to market, and contribute to profitability.

M09: Is Lean Scheduling right for my organization - This session will review the different scheduling options, and provide guidance on which options apply to the different styles of manufacturing production. Pluses and minuses of Finite Scheduling versus Lean (Federal Electronics case study). Helping the purchasing mindset understand the benefits of making the change from MRP planning to Lean Scheduling.

M04: Managing Job Priorities with the Priority Manager module - Join this informative session that provides step by step direction on how job priorities can be flexibly changed. Using the Priority Manager module, you will learn how you can effectively change job sequencing to meet changing customer requirements and demands.

F07: Simplify the process of applying Sales Tax - Learn how your company can stay current with tax rate tables and automatically upload and update this critical data in your VISUAL accounting system. Combined with Avalara LaserBridge+ sales and use tax forms and TrustFile e-filing and e-payment solutions, you can also close the loop on the entire returns and remittance process.

T03: Automate your Standard Reports - Learn how you can spend more time analyzing and evaluating your report data, through automated techniques that can simplify the process of deploying your daily, weekly and monthly reports using the report scheduler and launcher module.