



## *SESSION DESCRIPTIONS*

### **ACCOUNTING / MANAGEMENT**

#### **A1 PKI Management Forum**

**Saturday, September 19, 2009 9:30 – 10:20**

This session will allow users to bring questions to ProfitKey management that may not have been answered in the opening session CEO statement of the business. The session will be moderated by one of your Executive Committee Members to be sure everyone has a chance to participate.

#### **COMPUTER LAB**

#### **A2 Accounts Receivable/ Accounts Payable Course**

**Saturday, September 19, 2009 9:30 – 10:50**

A hands-on course designed to give participants an overview of Accounts Payable and Accounts Receivable. For the Accounts Payable application, the user will learn the following features and processing functions: How to set the AP system variables, AP Database Maintenance options, Invoice Processing with Invoice Receipts and Purchase Journal explanation, Check Processing of Payment Setup, Printing of the Check Journal report, Generating Checks, Printing Checks, Check Maintenance, and Cash Disbursements Journal explanation. Review and discuss AP reports. For the Accounts Receivable application, the user will learn the following features and processing functions: How to set the AR system variables, AR Database Maintenance options, Invoice Processing through Invoice Maintenance, Printing of the Invoice Journal, Printing of Shipments to be Invoiced report, Generating Invoices, and Sales Journal explanation, Cash Apply Workbench, and Cash Receipts Journal explanation. Review and discuss AR reports.

#### **A3 RRM Dashboard with CorVu**

**Saturday, September 19, 2009 10:30 – 11:20**

Dashboards: KPIs...Reports...Pivot Tables...Alerts...Graphs...access all of these through your web browser 24 x 7 without having to install anything on your machine. Dashboards are quickly becoming the standard for monitoring your organization's performance, and Key Performance Indicators (KPIs) provide you with a pulse of that performance. By having the ability to drill into detailed data and being automatically notified when performance drops below an acceptable level, web based dashboards provide you with the ability to be proactive vs. reactive so that you can manage your business more effectively.

#### **COMPUTER LAB**

#### **A4 General Ledger Course**

**Saturday, September 19, 2009 1:30 – 2:50**

A hands-on course designed to give participants an overview of the General Ledger application. This course will cover the following applications: General Ledger - Review of Processing, Monthly reports, and month-end and year-end close procedures.

#### **A5 CRM and How It Can Enhance Your Business**

**Saturday, September 19, 2009 1:30- 2:50**

Your business must become customer centric to survive in today's volatile business environment. Your products and services must address the needs of the customer. Find out how a Customer Relationship



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Management solution can transform your business into a customer-focused competitor and streamline your sales process by providing real-time information on leads, prospects and customers!

**A6 Navigating Through Rough Seas *NEW***  
**Sunday, September 20, 2009 10:00- 11:20**

It's the economy. Enough said. Rough sailing ahead or partially clearing skies. This session will be lead by a PKUG Executive Committee Member and focus on an exchange of ideas that can benefit all in these economic times.

**A7 Case Study – Accounting *NEW***  
**Sunday, September 20, 2009 11:30- 12:20**

See the benefits of using RRM's fully integrated Accounting Application from the perspective of a user.

**A8 Costing: Who, What, Where, When and Why?**  
**Sunday, September 20, 2009 1:30 – 3:50**

Costing is one of the least understood aspects of RRM. This session targets users of non-LIFO/FIFO costing and gets into fine detail on how the costing system works. Some of the areas covered will be the various costing methods and their relative advantages and disadvantages, how purchased items are costed, the behavior of linked purchase orders, how standard costs are calculated and how inventory items are valued and what value they bring with them into WIP. The session ends with the step-by-step standard costing of a manufactured item and the evaluation of its variances.

**A9 Accounting Round Table *NEW***  
**Monday, September 21, 2009 9:30- 10:20**

Round table discussion on future plans for integrating third party financial systems into RRM. (For example, QuickBooks.)



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### **GENERAL**

#### **G1 What's New in 7.6.x**

**Saturday, September 19, 2009 9:30 – 10:20**

**G1a (repeat) Sunday, September 20, 2009 1:30 – 2:20**

This session will cover the new enhancements and major functionality changes that are being developed for 7.6.x. Some examples of what will be discussed are Linking of Shop Orders to Job/Lots, Job Costing Reports, Work In Process Report, Inventory Transaction Report, PO Received not Invoiced Report, Stock Status Report, and Inventory Costing Report.

### **COMPUTER LAB**

#### **G2 Crystal Reports Beginner**

**Saturday, September 19, 2009 9:30 – 11:20**

Come to this course and learn how to use Crystal Reports. You may not leave an expert, but you'll learn some great tips and tricks. Learn how to connect to your data, selecting fields and records, sorting and comprehensive formatting and layout features by building this useful Inventory Status Report.

#### **G3 What's the Difference? Version 7.5.3 to 7.6.1**

**Saturday, September 19, 2009 10:30 – 11:20**

Don't miss this high level overview of the features, architecture and new modules that make Version 7 the **ONLY SOLUTION**.

#### **G4 Engineering Change Management (ECM)**

**Saturday, September 19, 2009 11:30 – 12:20**

**G4a (repeat) Monday, September 21, 2009 11:30 – 12:20**

Now users will be able to formalize the design and redesign processes with features such as ECM Requests with a sequence of specific sign-offs, release and discontinue dates for revisions, the ability to hide forbid production to use certain revisions until specific criteria have been met and the ability to control which users are able to edit revisions and to what degree.

### **COMPUTER LAB**

#### **G5 Access for Beginners**

**Saturday, September 19, 2009 1:30 – 3:20**

This is a beginner course in Access. Learn how to use this powerful tool to store, locate, print, and automate access to nearly any type of important information. You will learn how to link tables and create relationships, queries, reports, and macros by building this useful Open Order Report.

#### **G6 RRM Tips on Getting the Biggest Bang for Your Buck!**

**Saturday, September 19, 2009 2:30 – 3:20**

This session will enable you to get the most out of RRM version 7. Query by Example, Setting Preferences, Saving listings to Excel are just a few of the many little known features of Rapid Response Manufacturing. These and more will give you some 'power tools' to put to use in your enterprise.



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### **G7 Costimator**

**Sunday, September 20, 2009 9:00 – 9:50**

Learn how Costimator JS from MTI Systems calculates the cycle time and cost of manufacturing a part or assembly in your shop, based on the capabilities of your equipment and your shop rates. This informative session will also show you how with Technical Estimating you can increase your RFQ “Win” by as much as 100%, eliminate jobs that cost you money to produce, reduce estimating time by up to 200% and increase shop floor productivity by up to 30%. With the embedded integration in RRM, importing and exporting from Costimator is seamless.

### **G8 Crystal Reports – Advanced Workshop**

**Sunday, September 20, 2009 9:00 – 3:50 (will break for lunch)**

This is an all day Advanced course in Crystal. Learn the tricks of how to modify existing ProfitKey Crystal Reports. We’ll do a quick review of the PK Database Schema, and build an Item Costing Detail report. This complex report includes sub reports and more details on the interworking of Crystal.

## **COMPUTER LAB**

### **G9 Manufacturing Course V7 Order Cycle**

**Sunday, September 20, 2009 9:00 – 12:20**

This beginners hands on course will give participants an overview of the entire manufacturing cycle. It will begin with entering an order and taking it through shipping. Topics will include setting up orders, product structure, creating work orders, issuing material, labor and shipping. A lot of information will be gained in a short period of time.



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### **MATERIAL PLANNING**

#### **M1 By-Product**

**Saturday, September 19, 2009 9:30 – 10:20**

New RRM Item Classification of By-Product permits the planning for and work order cost reduction due to creation of secondary product. By-Product normally is the creation of scrap due to machining, stamping, casting or plastic molding activities. In many activities the remaining material that is unsuitable for its original purpose many times can be sold or reused as a raw material for another work order. This session will explain the creation, planning and costing activities of the By-Product activity.

#### **M2 Netting/Manufacturing Planning**

**Saturday, September 19, 2009 11:00 – 12:20**

Exploring the planning visibility, relationships and actions presented in Netting. Netting is the focal point for visibility of all demand and the management of Supply activities. Review the exceptions and Planned Order created by MRP regeneration. Create, review and manage work and purchase orders providing supply and maintain Master Schedules

#### **M3 Managing Material / Forum**

**Saturday, September 19, 2009 1:30 – 3:20**

Here you can learn how RRM provides for the timely and effective management of materials both with and without the use of MRP. We will discuss the techniques used to create a materials plan to support your production schedule as well as maintain a healthy inventory level. These concepts include the calculation and use of safety stocks and order points, a field-by-field discussion of the fields that address material control and the effective use of the MRP engine.

#### **M4 Kan Ban Phase I**

**Sunday, September 20, 2009 9:00 – 10:50**

**M4a (repeat) Monday, September 21, 2009 1:30 – 3:20**

The first phase of RRM's Kanban module has been released in 7.6.1. This first of two planned phases addresses dependent demand. It can be made to react in any of three ways to changing conditions that would trigger a kanban card in conventional systems. The Kanban module can move material from stores to a shop floor location, create a shop order to produce material or send a purchase order to a vendor via email. These reactions can be made to occur in response to changes in inventory quantity at a specific location or to a user's manual signal (i.e. scanning a bar coded label on a stock bin).

This session will cover the setup, administration and use of this new module. In addition, the session will cover the highlights of Phase II. Among other features, these include: responding to independent demand, orderly and controlled manufacturing without work orders, activity-based costing and additional kanban triggers that monitor conditions such as work center queue depth.

#### **M5 Advanced Material Backflushing**

**Sunday, September 20, 2009 11:30 – 12:20**

RRM's advanced backflushing feature can virtually eliminate the non-value-added activities involved in inventory control. Even though it was designed as a precursor to the kan-ban product, advanced backflushing is



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imbedded in RRM's core. It allows component items to be issued from stores to work orders in real-time as the manufactured product moves through its operation steps. What's more, users can now establish rules for RRM to follow regarding the sequence of locations from which to draw components and what to do if material is exhausted before the backflush is completed. Designing a feature this powerful to be virtually automatic at the shop level requires increased complexity at the administrative end. This session, therefore, covers the procedures users will need to properly manage this powerful tool.

### **M6 Case Study – Material Planning *NEW*** **Sunday, September 20, 2009 1:30 – 2:20**

MRP affects only selected items in the Item Master. It creates suggestions, called planned orders, which attempt to balance demand as closely as possible. In this session you will learn how one user applies MRP in their company.

### **COMPUTER LAB**

### **M7 Purchasing Course - Beginners** **Monday, September 21, 2009 9:30 – 10:50**

This class will allow the beginner to learn how some purchasing variables are set. This is a hands on class learning about the following features and processes in the Purchasing application. The user will learn database maintenance functions, how to enter a PO, how to receive a PO, how to invoice a PO receipt, and review and discuss some basic Purchasing reports to help process a PO from entry to Invoicing.

### **COMPUTER LAB**

### **M8 Purchasing Course - Advanced** **Monday, September 21, 2009 9:30 – 10:50**

Hands on session to review skills and expand your knowledge toward advanced uses in RRM Purchasing. This session will review the basics of setting system purchasing variables, master file data related to purchasing cycle behavior and costing considerations. Manual creation and maintenance of Request for Quotes and Purchase Orders to Purchase Order creation from recognizing requirements from Order Requirement Review, Requisitions and reviewing requirements and Planned orders in Netting. Creation of Purchase Order from Request for quote, Work Order linking, printing, receiving, costing and closing will be reviewed and discussed.



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### **OPERATIONS**

#### **O1 Statistical Process Control (SPC) with InfinityQS**

**Saturday, September 19, 2009 9:30 – 10:20**

To learn more about how SPC can help your organization, InfinityQS will present a live demonstration of its #1 independently-ranked Real Time SPC software products. In this live SPC demo, you will learn:

1. Why operators find InfinityQS so easy to work with
2. How to easily manage shop floor data collection
3. How to access electronic documents and create a paperless shop floor
4. How to pinpoint areas for cost reduction and process improvement
5. How managers can easily extract meaningful information from enormous amounts of data

If you truly want to reduce costs and improve quality, come view InfinityQS' live demo and see how our products have revolutionized the use of SPC in manufacturing companies like your own.

#### **O2 Cause & Corrective Action**

**Saturday, September 19, 2009 10:30- 11:20**

RRM Cause & Corrective Action provides defect tracking from initial reporting through corrective and preventive action. Users work from an "Electronic to Do Lists" based on input from the shop floor or inventory transactions. Also interacts with RMA.

#### **O3 Case Study – MES**

**Saturday, September 19, 2009 11:30 – 12:20**

Curious about MES? MES provides paperless travelers with additional transaction types not available with LDC or manual time card entry. It also provides management with valuable information when a machine is down. Here's your chance to hear from a fellow user who is using MES. See how easy it is to implement and how it can help with all your labor data collection issues. Have your questions answered by a user who is currently using MES and how it has helped them.

#### **O4 Data Collection / Labor Reporting & Rapid MES**

**Saturday, September 19, 2009 1:30 – 3:20**

User panel discussion of the RRM methods of Labor activity reporting utilized to solve individual reporting requirements. The use of MES, Labor Data Collection, Operations Count Entry and manual Labor Reporting/maintenance will be explored. The use of the printed Traveler with dispatch reports vs. On Screen dispatching and order visibility will be discussed.

#### **O5 Capacity Management**

**Sunday, September 20, 2009 9:00 – 12:20**

Review your planning and use of RRM Capacity Management Scheduling tools. Review of system settings, Shop Calendar, Work Centers and Structure in relationship to RRM Scheduling methods. Backward, Forward and Common Sense scheduling rules are explored. What the scheduler does Selection and anticipating results with different Global options and analyzing the result of the global with the global log and Scheduler Workbench.



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### **O6 Return Material Authorization (RMA)**

**Sunday, September 20, 2009 11:00 – 12:20**

**O6a (repeat) Monday, September 21, 2009 1:30 – 2:50**

Learn how using Return Material Authorization (RMA) will give you the ability to control the return of goods to your facility, provide details as to the reason for the return, and interface to the RRM Cause and Corrective Action system. This is definitely a must see session!

### **O7 Scheduling Reports**

**Sunday, September 20, 2009 1:30 – 4:20**

**O7a (repeat) Monday, September 21, 2009 9:30 – 12:20**

As its name suggests, this session focuses on the interpreting and use of RRM's various scheduling reports such as the *Work Center Capacity Report*, the *Dispatch Reports*, and of course, the *Global Report*. But in addition to these subjects, this session will expand to a discussion of scheduling techniques in general and will address specific questions raised by the attendees. In past conferences, this session has evolved into a dynamic forum of information and is one of the best-attended and most highly-evaluated sessions.

### **O8 Maintenance Management & CMMS**

**Monday, September 21, 2009 9:30 – 10:20**

ProTeus V is the flagship product of Eagle Technology, a leading developer of Computerized Maintenance Management Software (CMMS). Customers worldwide benefit from increased productivity, decreased downtime, decreased costs and a fast Return on Investment.

### **O9 MES**

**Monday, September 21, 2009 9:30 – 11:20**

Don't miss this session! ProfitKey's Rapid MES can improve operator productivity and accuracy. Learn how you can experience the ultimate in real time processing, timely electronic dispatching, tighter control of operations and simplified data collection while reducing rework!

### **O10 eCommerce Portals: Customer w/EDI and Supplier**

**Monday, September 21, 2009 10:30 – 11:20**

From billion-dollar retailers to home-based operations, doing business on the internet has now become a major focus of nearly every company in the world. The internet is facilitating supply-chain management, business-to-business transactions, and direct-to-consumer marketing and sales. ProfitKey has technology that can support and enhance your internet presence; come join this open discussion of how you're using these solutions, and find out how you (and we) can improve.

### **O11 Case Study – Quality / Cause and Corrective Action**

**Monday, September 21, 2009 11:30 – 12:20**

Want to hear first-hand how Quality / Cause and Corrective Action are being used by a fellow ProfitKey user? The RRM Quality module provides the ability to perform inspections against parts and provide details of what defects were found in an inspection sample. RRM Cause and Corrective Action provides defect tracking from initial reporting through corrective and preventive action. See how easy it is to implement, and have your questions answered by a user who is currently using Quality / Cause and Corrective Action and learn how it has helped them.



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### **O12 Networking Forum – Scheduling**

**Monday, September 21, 2009 1:30 – 2:50**

This forum will be a round table discussion on the scheduling and capacity management functions of the RRM product. Attendees will discuss how they schedule their orders and maintain on time deliveries. Questions will be answered on setting up work centers and using scheduler workbench. If you have scheduling questions, this will be a great opportunity to get answers from other users on how they deal with the tough issues. This session will then be open for discussion among users – don't miss this opportunity to have your scheduling questions and concerns addressed!

### **O13 Quality**

**Monday, September 21, 2009 3:00 – 3:50**

Quality Management & Inspection Capabilities which includes User definable sample plans, Inspection / Employee, Matrix, Routing based on Process Inspection, Capture details of who performed what action, Allow QA Manager to over-write any inspection, Reporting Suite and much more!



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### **TECHNICAL**

#### **T1 Understanding Schema**

**Saturday, September 19, 2009 10:30 – 11:20**

**T1a (repeat) Sunday, September 20, 2009 1:30 – 2:20**

DB Schema - This is a technical session that will cover the details of the RRM database including definition of the primary and foreign keys and relationships between tables. This information will be useful when developing Access, Crystal, or other queries of the database.

#### **T2 Importing Data Into Excel**

**Saturday, September 19, 2009 11:00 – 12:20**

This session is for those users who like to work with data in excel. Learn the techniques to import data into excel using Microsoft query. This tool will allow the user to pull data into excel so that it manipulated. Reports can be created by linking tables and setting criteria. The excel spreadsheet can then be saved and refreshed on an as needed basis.

\*\*Please note that it will not be an import function and will not write back to the database.

#### **T3 Field Level Security & New Password Enhancement**

**Saturday, September 19, 2009 11:30 – 12:20**

**T3a (repeat) Sunday, September 20, 2009 3:00 – 3:50**

This is a two for one class! Security is very important to all companies. Field level security allows the administrator to control who can view and modify not only a form but field by field. The enhancement to password control will also be demonstrated. This feature will allow the administrator to maintain how a password can be set up as well as how often a password will need to be changed.

#### **T4 Case Study – MSI *NEW***

**Saturday, September 19, 2009 1:30 – 2:20**

Are you still manually installing ProfitKey updates to each of your clients? Then this class is for you. An msi (Windows Installer program) can be “pushed” to a client via group policy, so that when the client log’s in to your network, the install will automatically run and the client is updated. We will cover how to setup the group policy on your windows network and the steps (detailed) on deploying the updates.

#### **T5 Application Program Interface (API)**

**Saturday, September 19, 2009 2:30 – 3:20**

Did you know there are seven API’s that are included in ProfitKey’s RRM? Come to this session and learn more about them! ADJ – Inventory Adjustments, CCT – Cycle Count Tag Counts, ISS – Material Issues, LAB – Labor Transactions, POR – Purchase Order Receipts, REC – Work Order Receipts and SHP – Customer Order or Job Shipments will be covered.

#### **T6 Version 7 System Admin / ORACLE**

**Sunday, September 20, 2009 9:00 – 10:20**

This session will provide an overview of RRM security features, how to install an update and check for PK errors. Intended for new system administrators. This session will also cover Oracle database issues that the new Oracle customer should know in order to minimize potential problems. The attendees will see that with the



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right guidelines, database administration can be simplified and reduced to a few periodic tasks. You will see how to use Oracle Enterprise Manager and discuss proper backups.

### **T7 Intro to ASP**

**Monday, September 21, 2009 11:00 – 12:20**

What is ASP? How can it be used in my network? What is it good for? This exciting technology will be unveiled to you so you can see for yourself how easy it would be to introduce real time reports to users outside of the “standard” reports that ProfitKey provides.

### **T8 ASP Advanced**

**Monday, September 21, 2009 1:30 – 3:20**

Now that you know what ASP is, this course will give you an introduction to generating your first set of reports in an ASP environment on a Windows server. This course is geared towards IT professionals, but anyone with a bit of programming knowledge will be able to pick it up very easily!

### **T9 Backing Up & Recovering an Oracle Database**

**Monday, September 21, 2009 1:30 – 3:50**

Are you getting a complete Oracle Backup? If you need to restore what are your options? Learn first hand how to create, maintain and automate Oracle and ProfitKey Cold Backups for Version 7. You will set up Oracle Archiving and perform an Oracle Hot backup, which can restore you up to the minute you went down. We will review and perform Recovery scenarios and discuss do's and don'ts about exporting databases. Attendees should have an understanding of Oracle basics and SqlPlus.