

SESSION ABSTRACTS

Session Title: AP Tips and Tricks

Session Speaker: Luann Nollinger, Jenmar Corporation

Abstract:

Jenmar's recent expansion to Chile forced us to revisit some of the standard ROSS ERP features to meet the different laws, regulations and AP business practices of Chile. Topics include: Transaction Types, various invoicing methods, various methods of payments, postings formats, etc. Come hear what we have done and share what you have done to solve same or similar business issues.

Session Title: Automating Business Processes with Workflow: Part 1

Session Speaker: Scott Reeves, Litehouse Inc.

Session Speaker: Murray Fife, Senior Solution Consultant, CDC Software

Abstract:

In this session, Murray Fife and Scott Reeves will give an introduction to the Workflow capabilities that are now available within the Ross ERP framework, and show how this module may be used to streamline processes within the organization. The presentation will be a good overview for people thinking about implementing workflows within their organization, and also a great chance for existing BPM users to get a peek at the new BPM 6.4 release which has a number of new capabilities that they may want to see. For Part 2 see *Workflow from a customer perspective*

Session Title: Business Intelligence: Focus on the Inherent Value Hiding in Your ERP Database

Session Speaker: Ted Benham, VP of Information Technology, Frank Calandra, Inc. (Jenmar Corp)

Session Speaker: Murray Fife, Senior Solution Consultant, CDC Software

Abstract:

Ted Benham is Vice President of Information Technology at Frank Calandra, Inc. (Jenmar). Frank Calandra, Inc. is a privately held manufacturer of products primarily sold to the mining industry for ground control. Murray Fife is Senior Technology Solution Consultant at CDC Software with over 15 years of experience tinkering with the Ross ERP product suite. Ted will discuss how you can use business intelligence tools to leverage your ERP system, providing valuable business insight. He will take you along the path that Frank Calandra, Inc. followed, including the speed bumps and detours along the way. This journey provided insights into details that did not seem important initially, but made a significant impact on the value of the information. Encountering challenges we all face, they made adjustments, compromised where necessary, and delivered a resulting solution that is considered a strategic company asset. Murray will outline how the Ross EPM product provides a turnkey business intelligence solution that can be implemented quickly and efficiently for Ross ERP and Pivotal CRM customers to jumpstart your Data Warehousing and Business Intelligence projects.

Session Title: CDC Tradebeam

Session Speaker: Stephanie Kruse, CDC Software

Abstract:

CDC TradeBeam

See one of the newest additions to CDC Software, TradeBeam which offers i-Supply and Global Trade Management. i-Supply provides Supplier Collaboration for Supply Chain Visibility to optimize Working Capital and reduce Inventory Levels. Global Trade Management provides Export Compliance solutions for Restricted Party Screening, License Determination, License Management, Export Document Generation, and Product Catalog.

Session Title: Creating Ross Reports using Reporting Services for Beginners

Session Speaker: Michael Viglas, Illes Seasonings and Flavors

Abstract:

So You Want to Create Your Own Visually Appealing Reports Using Your Ross Data? Now you can with Microsoft Reporting Services. In this session, you will see how, instead of using out of the box reporting, Illes leveraged their Ross ERP system and utilized built in features of Microsoft SQL to create their own reports to provide the data desired from the user community. We will go over the basics of creating reports using free tools that come with MS SQL including data views, stored procedures, the report designers and wizards. After leaving this session, you will hopefully walk away with new ideas on how to provide the data your users need in easy to read, versatile and exportable formats.

Session Title: Crystal Forms Bundle

Session Speaker: Derek Christensen, Litehouse, Inc.

Abstract:

If you're looking to send Ross generated documents to outside companies, the Crystal Forms Bundle may be your answer. They have a modern look and feel and use a modern, dynamic design tool. We will discuss the in's and out's of how Ross interacts with Crystal Reports, what reports are standard, and how to code additional fields from the dml to the XML source for Crystal.

Session Title: Developer's Tools

Session Speaker: Murray Fife, Senior Solution Consultant, CDC Software

Abstract:

In this session, Murray Fife will take the developers on a tour of all of the developer tools that they have available to them including:

- New features in Developer Studio
- Debugging code using Studio Debugger and Developer Studio
- Creating Active Links, Document Links and custom BPM Exits
- Managing notifications with the new Event Management Framework and more...

Session Title: SCP:Demand Planning/Sales Forecasting

Session Speaker: Brian Taylor, SI Group

Abstract:

SiGroup has been using Demand Planning and Sales Forecasting to maintain and manage our sales forecast over the last few years. In the past twelve months, we have rolled out these tools on a global basis to users in 10 different countries. We presently have 12 DP users and 60 SF users worldwide. This presentation will outline how we make use of the software's functionality to meet both our annual and monthly forecasting requirements and our plans to ultimately use this as a global planning tool. We will outline the challenges in implementing across multiple companies and describe how we are using the tools to meet a variety of needs from straight volume forecasts for planning to managing predictive sales margin. We have just upgraded to SCP version 6.4 and we are taking advantage of the new collaborative functionality with SF that is now available and we will discuss the advantages we have gained through standardizing our forecasting process through the usage of these tools. This presentation will also discuss the limitations of the tools that we have discovered and offer some suggestions as to how it may be enhanced for the future.

Session Title: Living through a Financial Audit**Session Speaker: Ricki Reeves, Evolution Fresh****Abstract:**

Due diligence is a process to confirm the facts stated about the company are indeed true. This is done through interviews with key personnel. An independent accounting firm will audit the financial statements through the use of system generated reports.

Financial Information

- Audited financial statements for three years, together with Auditor's Reports.
- The most recent unaudited statements, with comparable statements to the prior year.
- Auditor's letters and replies for the past five years.
- The Company's credit report, if available.
- Any projections, capital budgets and strategic plans.
- Analyst reports, if available.
- A schedule of all indebtedness and contingent liabilities.
- A schedule of inventory.
- A schedule of accounts receivable.
- A schedule of accounts payable.
- A description of depreciation and amortization methods and changes in accounting methods over the past five years.
- Any analysis of fixed and variable expenses.
- Any analysis of gross margins.
- The Company's general ledger.
- A description of the Company's internal control procedures.

Conclusions: Ross Systems are able to provide all financial information needed to confirm the financial records of the company. Due diligence made easy through Ross!

Session Title: EDI: Everything You Ever Wanted to Know**Session Speaker: Allyson Maurer, Rochester Meat Company****Abstract:**

Join me for a humorous yet informative look at how EDI works in Ross Enterprise. We will follow an incoming sales order (ISO) from its birth as a customer PO until it is settled cozily in Ross SOP ready to be processed. During our journey we'll explore mapping, events and exceptions along with all of our favorite EDI acronyms. If you are responsible for monitoring and maintaining EDI and always wanted to know what is behind the scenes, you will enjoy this session. If you are a seasoned EDI veteran, please join us to compare stories and add your wisdom to the discussion. If your company is considering an EDI implementation, this overview will get you off to a good start.

Session Title: Enabling Supply Chain Agility**Session Speaker: Doug Metcalf, General Manager, CDC Supply Chain****Abstract:**

Today's Supply Chain professionals face a difficult challenge:

"How do I achieve an agile, flexible and responsive supply chain to mitigate the increasing risk inherent to operating in a global economy?"

In this session, CDC Supply Chain will cover strategies and technology that improve the resiliency of your supply chain and it's ability to absorb the shocks that create risk to customer service levels, profitability and your competitive advantage. Supply chain execution topics to be covered include:

- Order Management
- Distribution Management
- Global Trade
- Supplier Collaboration
- Event Management
- Supply Chain Visibility

Attendees will gain insight and perspective that will prove valuable in guiding their company to establish an agile, flexible and responsive supply chain.

Session Title: EPM Financials

Session Speaker: Carl Block, ISMIE Mutual

Session Speaker: Lisa Weir, CDC Software

Abstract:

This session will give an overview of the EPM Financial Analytics. There will be discussion of the business model and the issues we hoped to resolve along with how to use the product and create reports, along with adding in additional external data.

Session Title: ERP V6.4 / SP1

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

For ERP V6.4, Service Packs will be released every 4 months with new functionality. V6.4 with IAF 8.1 Smart Client was released in February and SP1 was released in June 2010. See a demonstration of the new V6.4 User Interface along with the additional features in SP1, including the new Ross Reporting Services reports.

Session Title: Financial Reporting

Session Speaker: Carl Block, ISMIE Mutual

Session Speaker: Lisa Weir, CDC Software

Abstract:

This session will give some insight in to the conversion from FRX to Financial reporting. While the output looks the same, getting there is significantly different. We will discuss the conversion process and show examples of creating new reports.

Session Title: Migrating Multiple Business Units to One Centralized System

Session Speaker: Chem Trend

Session Speaker: Kluber

Abstract:

During this session, Chem Trend and Kluber IT staff will share their experiences on what it took to migrate four locations in the US and Mexico to a single site. This large scale implementation required significant strategy and planning that took over a year to roll out. From this session you will come away with a perspective of the complexities of such a project, what is required to deliver the best performance, redundancy and reliability as well as some of the obstacle encountered and benefit achieved.

Session Title: Monthly and Year End Closing Process Roundtable

Discussion Leader: Tom Curcio, VP and Controller, Dicar, Inc.

Discussion Leader: Bryan Houser, Director of Customer Operations, Triangle Brick

Abstract:

This session is to demonstrate the process and review the Internal Controls employed to insure that all module source journals are updated to the General Ledger and that all modules are closed correctly. In addition we will review the year-end process and completion of new year calendars.

Session Title: Ross MPS/MRP improvements in SP1 with Tips and Tricks

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

Get advice from customers and experts on using MPS and MRP to improve Production Planning and Material Planning. Get tips on how to use MPS and MRP along with new features in SP1 to improve both performance and functionality.

Session Title: Oracle Recommendations and Best Practices

Session Speaker: Nir Friedman, NF Consulting

Abstract:

Geared for Oracle DBA's and IT managers, this presentation focuses on best practices based on fifteen years experience installing, configuring and administering Oracle in iRen environments

Session Title: Pilgrim

Session Speaker: David Koch, Solutions Consultant, CDC Software

Abstract:

How do you handle the creation and approval of Standard Operating Procedures? How do you manage Risk, Compliance and Quality in your organization? Attend this session to hear a presentation and see a demonstration on how using CDC Partner, Pilgrim Software you can leverage a competitive edge in the Marketplace.

Session Title: Pivotal 1: Business Process Use in a manufacturing environment

Session Speaker: Jason Ulrich, Management Information Analyst, Berner Food and Beverage, Inc.

Abstract:

Jason Ulrich, Management Information Analyst at Berner Food & Beverage, Inc., a private label/store brand food and beverage manufacturing company, will share the company's use of the Pivotal application. Pivotal has more uses than a glorified contact management system, when used to its potential; it has many front-end application processes that serve a business purpose and helps to avoid speculative data in your ERP environment. Jason will cover Sample Ordering & Management, Initiative Management, Customer Support Incidents, Label Development, Opportunities & Sales Cycle (Win/Loss), Supplier Audit Process and other uses Berner has developed within Pivotal for business processes. If you are contemplating what Pivotal is used for and agree that CRM is the wrong 3 letter application abbreviation for Pivotal, come hear what Berner has done and share what you have done to solve same or similar business process tasks.....

Session Title: Product Lifecycle Management

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

This session includes information on the Ross Product Lifecycle Management and how it can reduce product and recipe development cost, reduce time to market for new products and changes to existing products, and develop product specifications and nutritional labeling. Also included are first hand experiences from Litehouse Foods on their use of this new application.

Session Title: Pricing Hierarchy, Promotions and Commissions

Session Speaker: Litehouse, Inc.

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

In this joint presentation, both SI Group and CDC Software will present tips of how to define Pricing Hierarchies, Promotions and Commissions. This will cover the various Pricing capabilities and the Promotions features available in Ross Enterprise and will review how SI Group is using these features to meet their pricing needs.

Session Title: Procedure for using Ross to Rework Products

Session Speaker: Ron Eubanks, Illes Seasonings and Flavors

Session Speaker: Michael Viglas, Illes Seasonings and Flavors

Abstract:

Illes Seasonings and Flavors uses two methods in Ross to rework products. The first procedure is job specific used to rework one or two jobs. A customized screen is used for this. The second is used when it will take many jobs to complete the rework process. A customized report was written to track these products. R&D and IT will describe and demonstrate the procedure for setup and use of the rework process.

Session Title: Production and Scheduling Customization with Ross ERP

Session Speaker: Toby Harris, Illes Seasonings and Flavors

Session Speaker: Michael Viglas, Illes Seasonings and Flavors

Abstract:

Just picture it!!! Peanut butter without jelly, iced tea without lemon or even, my favorite, farm-raised catfish fillets without tartar sauce!! These are partners that are pretty average as stand-alone items, but awesome when combined together. We will introduce the integration and the advantages of the Planning & Scheduling features using the Ross ERP System. Yes, we did it!! They were configured to work alone, but just like the prior-listed delicious items, they are an extraordinary force when combined. This new & exciting advancement is sure to win you over & send you away realizing the future is already the present!

Session Title: Ross 103

Session Speaker: Murray Fife, Alan Katz and other CDC Software Experts

Abstract:

Back by popular demand, Murray Fife, Alan Katz, and other experts from CDC Software will be available in an open forum to answer any and every random question that you may have. If you are too shy to ask the question in front of the other users then you can also send them to Murray Fife in advance.

Session Title: Ross 6.4 Data Collection with Automatic Scaling System

Session Speaker: Joel Dennie, Illes Seasonings and Flavors

Session Speaker: Stuart Hunt, SG Systems

Abstract:

How Illes Used the Power of SG Systems Smart Scales. Illes Seasonings and Flavors' diverse product line caused the need to weigh partials of raw materials in our production process. Illes made the decision to implement the SG Systems Scaling system. Using SG Systems allowed for integration between the scales and our Ross ERP and for vast improvements in our efficiency, inventory accuracy, and consistency. Using SG Systems, we aim to achieve a 2-6% ingredient savings by eliminating waste. Learn more on functionality of these scales work as well the integration of these two systems and how they might work for you by attending this session.

Session Title: QC at Hammond Group with Custom Certificate of Analysis (CoA)

Session Speaker: Mark Lutzow, Hammond Group, Inc.

Abstract:

QC as implemented at Hammond Group, Inc. is maintained at the Product and Product Lot level, utilizing Specification Codes with related Characteristic Codes. Each Specification and Characteristic has a specified Upper and Lower limit with an associated Standard value. Through various DML customizations in Manufacturing, QC

personnel are able to enter the QC Test results at the actual time the testing is performed. The system is also capable of maintaining multiple specs for a single product either for internal use or for multiple product specifications by customer.

At the time of product sale and product shipment, Hammond users are able to produce, in real time, a Certificate of Analysis (CoA). The Ross ERP system and CoA generation program select the correct Specification and Characteristic codes for Publication on the CoA without user intervention.

Customer service and sales personnel can provide an exact duplicate of a CoA to a customer anytime after the product has been delivered, thanks to Hammond's ERP document management system.

Session Title: Ross Mobile

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

The Ross Mobile application extends Customer, Pricing, and Inventory information in the ERP system out to field sales personnel via 3G cellular devices such as Black Berry, iPhone and SmartPhone solutions. The latest release of Ross Mobile also provides field sales capabilities to enter Sales Orders and Credit Returns. This presentation will show examples from Ross Mobile and answer your questions of how to deploy this capability to your field sales force.

Session Title: Smart Client from technical perspective - 1

Session Speaker: Murray Fife, Senior Solutions Consultant, CDC Software

Abstract:

Smart Client from technical perspective - 1

The Smart Client technology framework is not complicated. In this session, Murray Fife will demystify the Smart Client technology, and show you how to get the most out of the technology. Put on your beanie hat and prepare to get your hands dirty in the IAFConfig files.

Session Title: Smart Client Roundtable

Discussion Leader: Paul Pazienza, SI Group

Discussion Leader: Megan Owens, Litehouse, Inc.

Abstract:

Ever wish you could just sit down and chat with people who are actually using Smart Client? You can do just that when you join us to review user experiences in a roundtable setting led by Paul Pazienza of SI Group Inc. and Megan Owens of Litehouse Inc. This session will cover results from recent testing performed by SI Group, CDC Software and Litehouse. We will review the new user interface, configuration, performance, and overall user experience. Please plan on attending and bring your own experiences and share them with the group. There is always something to learn and I am sure we all can learn something from this session.

Session Title: SQF Audit

Session Speaker: Jack Payne, VP Enterprise Software, CDC Software

Abstract:

Learn how to prepare for Food Safety Certifications. This session includes discussions on the various Food Safety Standards, the Overview Process, Certification Timeline and Process for Certification.

Session Title: SQL vs Oracle Roundtable

Discussion Leader: Nir Friedman, NF Consulting

Discussion Leader: Alan Katz, CDC Software

Discussion Leader: Derek Christensen, Litehouse, Inc.

Abstract:

A roundtable to discuss Microsoft SQL Server and/or Oracle databases with Ross. Topics could include performance issues, the IAF layer and transitioning from one database to another. Both Nir Friedman (Oracle expert) and Alan Katz (SQL Server expert) will attend to assist in the discussion. If you're using Oracle or SQL Server come on by and join the discussion.

Session Title: SQL Server Tips and Tricks**Session Speaker: Alan Katz, CDC Software****Abstract:**

What's new for the Microsoft SQL Server 2008 R2 release? I will provide an overview of release changes and enhancements included in the Microsoft SQL Server 2008 R2 release as well as considerations for upgrading from older releases of Microsoft SQL Server. An overview of Ross Reporting Services for 6.4. With the release of Service Pack 1 for Ross ERP 6.4, CDC Software is offering Ross Reporting Services for the 6.4 release. I will present an overview of this new offering and how Microsoft SQL Server Reporting Services is being used to enhance the current reporting capabilities of Ross ERP and how customers can develop and integrate their own reports into this framework.

Session Title: Sustainability, LCA and Eco Design - How to integrate LCA into your product development process**Session Speaker: Carlo Colombo, Selerant Corporation****Abstract:**

Sustainability is beginning to transform the industry with environmental, economic and social factors being considered, evaluated and implemented throughout the design and supply chains like never before. This presentation will cover a review of the industry's current approach to balancing environmental, economic and social considerations throughout the design and lifecycle chain. The presentation will cover key concepts such as Life Cycle Assessment (LCA) and Eco Design as it is currently used by the industry and how a PLM software can support the sustainability strategy.

Session Title: Trace Express**Session Speaker: Jack Payne, VP Enterprise Software, CDC Software****Abstract:**

Trace Express is the intuitive, graphical lot trace that provides a complete traceability summary from Supplier Receipts to Customer Shipments and Invoices that was released with V6.3 SP5. In this informative session, see the latest release of Trace Express from V6.4 SP1 along with a customer presentation from Illes Seasoning of how they are using Trace Express.

Session Title: Trace Express with Recall**Session Speaker: Michael Viglas, Illes Seasonings and Flavors****Session Speaker: Jack Payne, VP Enterprise Software, CDC Software****Abstract:**

What's New with Lot Trace Nowadays? Illes has a stringent mock recall program that is followed routinely. Due to the reporting requirements by various auditing agencies, Illes is required to provide quick, concise and most importantly accurate data. Recently, a lot was tested in the out of the box Lot Trace system which generated a lengthy and extremely detailed 400 page report that took several hours to analyze and find relevant data. For Illes

this was not quick, especially to the auditors. In comes Trace Express. The graphical and contextual menus of Trace Express provided a much better user experience and quick access to the data. Using summarization, the required data was easily located and extracted to Excel. Using this new process, Illes was able to complete the requested data within 20 minutes. Illes is now more prepared than ever to provide any data needed for the mock recall program as well as for any audits, much less any REAL recalls.

Session Title: Transportation Management/Distribution

Session Speaker: Craig Keller, Midwest Trading

Abstract:

This session will detail the customizations put in place by Midwest Groundcovers and Midwest Trading in order to handle the shipping and distribution challenges faced by the two companies. A mixture of company owned vehicles and outside contractors are utilized to deliver nursery stock and horticultural hardgoods to customers throughout the 5 state area around Chicago, Illinois.

Session Title: Using Microsoft Tools with Ross ERP

Session Speaker: Murray Fife, Senior Solution Consultant, CDC Software

Abstract:

There are a lot of tools from Microsoft (that you may already have) which can use to extend out the existing functionality within the Ross ERP applications like SharePoint, Reporting Services, and InfoPath. In this session, Murray Fife will show how you can use these to create ERP/Microsoft Mashups that will make you look like a superstar to your users without a lot of effort.

Session Title: Workflow from a customer perspective: Part 2

Session Speaker: Murray Fife, Senior Solution Consultant, CDC Software

Abstract:

In this session, Scott Reeves from Litehouse Foods will explain how they have used Workflow to improve their processes within the organization. Scott will illustrate examples such as the automation of their Payables 3 Way Match through the use of Workflow, SharePoint, and Document Imaging to reduce the amount of manual invoice matching, and also their OS&D project which uses Workflow, SharePoint and Microsoft InfoPath to streamline their processes. For Part 1 see *Automating Business Processes with Workflow*.