

**Sunday — 16 October 2016**

Time	Session Title	Location
12:00 PM-5:00 PM	<b>REGISTRATION / INFORMATION DESK</b> North Tower Foyer	
1:00 PM — 5:00 PM	One-on-One Consulting — Patio Studio 1 (25 minutes sessions, all day on Monday and Tuesday)	
1:00 PM — 5:00 PM	<b>Strategic Planning Sessions — Maestro North Studio &amp; Executive North Studio</b> (60 minute sessions)	
<p>Many customers have taken advantage on our one-on-one sessions to get specific problems solved at the conference. This year we will be offering something that is designed for the 'bigger picture'.</p> <p>Ever wondering how well you are using VISUAL to improve your business? Or how VISUAL can support your Strategic direction based on your business? Or how to adopt proven change management techniques to better take advantage of the investment you have in VISUAL?</p> <p>If you are interested in exploring these and other Company level topics on Sunday of the conference, please contact Michele Shannahan <a href="mailto:mshannahan@synergyresources.net">mshannahan@synergyresources.net</a> to reserve a 1 hour session time during the afternoon.</p>		



**DAY 1 —Monday — 17 October 2016**

7:00 AM-5:00 PM	<b>REGISTRATION / INFORMATION DESK—North Tower Foyer</b>	
7:00 AM-8:30 AM	<b>BREAKFAST - Greenwich &amp; Compass Rooms</b>	
8:30 AM — 9:00 AM	<b>OPENING CEREMONY</b> with Synergy Partners, Gene Caiola & Mark Lilly	Greenwich & Compass Rooms
9:00 AM — 10:00 AM	<b>VISUAL Roadmap</b> — with Infor's Rich Lagoy What's after VISUAL 8.0? Come to this session to see how Infor is continuing to invest in VISUAL now and in the future.	
<b>10:00 AM—10:15 AM—Break — North Tower Foyer</b>		
<b>10:15 AM—11:15 AM—One-on-One Consulting — Patio Studio 1</b>		
10:15 AM - 11:15 AM Concurrent Sessions	<b>Standard Financials—A to Z</b> — An overview of VISUAL's Financials. Learn how costs flow through the system and into the General Ledger. Will provide an overview of the AR and AP cycles as well as Cash and GL.	North Studio 1
	<b>Visual 8 Activities, Reminders and Automated Services</b> — Learn about this new feature that can help you keep track of the day-to-day activities throughout any VISUAL document.	North Studio 2
	<b>Production Tips &amp; Tricks</b> — Knowing what is going on (and what's not) on the shop floor is vital to your business! Know what you don't know. Learn various strategies and specific techniques for maintaining the accuracy of your work orders and keeping a pulse on your operations.	North Studio 3
	<b>Using Infor IQM to Achieve Total Quality Management</b> — Total Quality Management is the key to a competitive advantage in today's business environment. In this session, discover the many Quality Tools available to your VISUAL Users.	North Studio 6
	<b>SQL Server Reporting Services</b> — Learn how to create, deploy, and manage reports for VISUAL using SQL Server Reporting Services (SSRS), to help you create, deploy, and manage reports for VISUAL Enterprise. Reports are viewed using a web based server that allows users to optionally export data to Excel, PDF and other formats. Learn how Report Server supports role-based security, and how it can automatically generate reports on schedule. SQL Server Business Intelligence Studio will be used to provide examples.	North Studio 13
<b>11:30 AM—12:30 PM—One-on-One Consulting — Patio Studio 1</b>		
11:30 AM - 12:30 PM Concurrent Sessions	<b>Calculating Burden and How it Affects Costing</b> — See examples of how companies calculate and update their burden rates on the floor including techniques for Retro-Burden.	North Studio 1
	<b>Master Scheduling and Forecasting</b> — Are Forecasts part of your planning world? Advanced Material Planning allows for multiple forecasts, time phased modifications to the forecast utilizing time fences, and updates to the Master Schedule. Bulk release of planned orders can be filtered to a specific vendor, buyer or planner.	North Studio 2
	<b>VISUAL Throughput—Optimizing Profitability</b> — Identifying and implementing ways to increase your company's Throughput can help improve your company's on-time delivery, productivity, and profitability. Learn key concepts and how VISUAL helps you do it in this session.	North Studio 3
	<b>SmartViews—Why It Has Changed the Reporting Game</b> — SmartViews allows the users to get the data they want, when they want it, HOW they want it! See, analyze, and track information that helps you better support departmental, company and supplier performance metrics and goals.	North Studio 6
	<b>Personalizing Your VISUAL Experience</b> — How to customize your browse.ini file to increase the number of fields and tables included in your standard searches. Visual.ini and preference settings of interest as well as VMBrowse tips and tricks. Central management of user setting with VE Scripts.	North Studio 13
<b>11:30 AM—12:30 AM - PARTNER SESSION — The Made to Order Dilemma – Raw Materials and WIP Tracking in VISUAL- Presented by Jeff Lem, Portable Intelligence — Patio Studio 2</b>		

**12:30 PM—1:30 PM Lunch Presentation — Greenwich & Compass**

**Presentation Title:** Government Funding: Cash Flow Planning Options to Innovation & Accelerate Growth  
**Speaker:** Bernadeen McLeod, Founder and Owner of Mentor Works Ltd.

**Presentation Description:** This presentation will focus on how government funding programs help small and mid-sized businesses tackle the barriers of financing in order to prosper and achieve growth. Whether it is to serve the need of working capital, expanding into new markets, software or hardware investment or to purchase other manufacturing equipment, there are new creative ways to approach financing to solve your innovation challenge. Mentor Works understands trends in financing and has compiled the best organizational tools and resources for researching government funding options to serve Canadian businesses both at the federal and provincial levels.

**1:30PM -2:30PM PARTNER SESSION — Reduce Engineering Costs by Integrating CAD with VISUAL - Patio Studio 2**  
*Presented by Rey Bustamante, QBuild*

**1:30 PM —3:45 PM — One-on-One Consulting — Patio Studio 1**

1:30 PM - 3:45 PM Concurrent Sessions	<b>Digging Into Your Inventory Costing</b> — This session will focus on the tools available within the software to address possible issues that arise with costing. Learn the standard auditing tools and techniques to find and correct issues, including the underlying theory. Will include examples of using SQL to view table data and determine data integrity. Learn to identify and correct potential costing issues.	North Studio 1
	<b>Purchasing Fundamentals</b> — Learn how to set-up vendors and vendor part information and see how that information flows into Purchasing. Vendor RFQ, and purchase Reqs will also be covered briefly.	North Studio 2
	<b>Infor CRM (formerly SalesLogix) and VISUAL CRM</b> — This session will provide a high level overview of both Infor CRM (acquired by Infor last year from SalesLogix) and VISUAL CRM allowing you to see the advantages and trade-offs of both.	North Studio 3
	<b>Continuous Improvement-Creating a Sustainable Methodology</b> — What is Kaizen? Why is it important? How does it improve Business Performance? Real case examples of unimaginable improvements.	North Studio 6
	<b>Preparing for Your VISUAL Upgrade</b> — Whether you are on VISUAL 6 or 7, you will learn about the key items to consider when upgrading to VISUAL 8. You will hear about some of these items, including: database schema.	North Studio 13
2:45 PM - 3:45 PM Concurrent Sessions	<b>VISUAL Business Intelligence</b> — See how simple it is to create real-time, powerful dashboards highlighting KPI's, as well as financial and operational reports. High level summary reports, complete with drill down to details, or drill-back to VISUAL, will be covered.	North Studio 1
	<b>Material Planning &amp; Scheduling</b> — This course will cover approaches for utilizing Material Planning and Scheduling tools within VISUAL to ensure you are buying and building at the right time to meet customer demand. Understand how VISUAL's Scheduler integrates with Material Planning. Understand the basic concepts on how the tool set operates.	North Studio 2
	<b>What Scheduling Methodology is Right for You?</b> — What shop floor scheduling method is right for your company? Attend this session to learn about the fundamental differences between the Global Finite Concurrent Scheduler and DBR / Easy Lean.	North Studio 3
	<b>Managing Materials in Production and the Work Order Release Process</b> — This session will focus on getting materials ready and into production. We will review best practices for creating Work Order Release procedures, material substitutions, alternates, on-the-fly material issues. Synergy's Trial kit (which allows a planner to dynamically see shortages) will also be briefly demonstrated as a tool for understanding whether a job is ready for kitting.	North Studio 6
	<b>Creating Macros</b> — Learn how to utilize macros in VISUAL to extend the capabilities, and fill company specific needs. Macros can be written in basic SQL language, or VB script. Some knowledge of both is recommended for this session.	North Studio 13

**3:45 PM—4:00 PM Break — North Tower Foyer**

**4:00 PM-5:00 PM Concurrent Sessions**

4:00 PM-5:00 PM Concurrent Sessions	<b>The Month-End Closing Process for Standard Financials</b> — Confidently close each month by coming to this session and learning the correct sequence of steps needed to process month-end information in VISUAL Financials.	North Studio 1
	<b>Implementing Concurrent Scheduling - A Simple Approach to a Daunting Task</b> — Implementing Concurrent Scheduling can be a daunting task when you look at all of the work to be done to achieve a detailed schedule. If instead you set reasonable milestones and work toward the ultimate goal in steps, you can get results quickly while continuing to improve. This will be a discussion of how to apply this approach.	North Studio 2
	<b>Infor CPQ—A New Way to Configure Product</b> — If you think it takes too long to take an order in your company - this session is for you. Learn how this state of the art, web-based configurator can help your employees, distributors, or even your customers easily, quickly, and efficiently place "buildable" orders with your company!	North Studio 3
	<b>VISUAL Supplier Management &amp; Synergy Vendor Portal-Track the Pulse of Your Supply Chain</b> — Learn how Vendor Portal can enhance the relationship with your suppliers by providing them access to your purchasing information and needs, and allowing them to directly update qty/price and expected delivery information right over the web!	North Studio 6
	<b>Programming and Integration — Connect VISUAL to Other Applications</b> — Understand how you can create applications using data from VISUAL with the new VISUAL API Toolkit and the Synergy Business Objects. Understand the ION middleware model for XML based cross platform communication.	North Studio 13

**4:00 PM—6:15 PM—One-on-One Consulting — Patio Studio 1**

5:15 PM - 6:15 PM Concurrent Sessions	<b>EPAK-How to Easily Create Your Internal Training Foundation &amp; Process Documents</b> Optional Product. Learn how EPAK can be used to quickly develop, easily manage, and effectively deploy business critical knowledge and documentation for the purposes of Business Process Development, Certification (ISO, etc.), and Training. See firsthand how EPAK can be used during all phases of your ERP software's lifecycle, from a new implementation where your goals include increased user acceptance/retention and improved productivity, to a more mature implementation where your goals are more centered around reducing support requests, lowering training costs, and supporting consistency/continuity of your processes.	North Studio 1
	<b>EasyLean Scheduling Concepts</b> — Step through 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.	North Studio 2
	<b>Taking Control of Your Outside Services</b> — Gain an understanding of the set-up and considerations for Outside Services. Learn how to use the Outside Service Planning Window and its reporting capability. Walk through utilizing the Outside Service Planning Window. If your work includes more than the occasional outside service, this planning tool will help to organize and purchase outside services with greater confidence.	North Studio 3
	<b>Infor CloudSuite Industrial</b> — Review Infor's Cloud-based offering for Manufacturing companies.	North Studio 6
	<b>Managing VISUAL Security</b> — Learn how VISUAL supports both user and profile security to control access in your organization. Field level security is a feature to limit the ability to modify certain fields to specified users. This session will also demonstrate ability to limit the users to save records with limited status. Include Standard VE, CRM, VFIN, VTA, etc.	North Studio 13
	<b>7:00 PM—11:00 PM — Welcome Gala Dinner — Britannia</b>	

**DAY 2 —Tuesday— 18 October 2016**

Time	Session Title	Location
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7:00 AM-5:00 PM	<b>REGISTRATION / INFORMATION DESK</b>	North Tower Foyer
7:00 AM-8:30 AM	<b>BREAKFAST</b>	Greenwich & Compass

**9:00 AM—11:15 AM—One-on-One Consulting — Patio Studio 1**

9:00 AM-10:00 AM Concurrent Sessions	<b>Managing Standard Costs to Support Better Estimating and Costing</b> — This session goes through the process of updating part master costs. For purchased product, there is the recalc standard functionality which will update based on an average over a defined period, or last purchased. For fabricated parts, see how to push down to engineering masters the updated purchased part values, push down burden/payroll costs, and then implode/update part master with new fabricated costs.	North Studio 1
	<b>VISUAL 8 Shop Floor Mobile Dispatch</b> — See how you can automate your production activities by deploying mobile devices that instruct shop floor personnel about the status of all work on the floor and on what to work.	North Studio 2
	<b>Manufacturing Window Overview</b> — The Manufacturing Window is the heart of the VISUAL system. Explore the basic, and more advanced functionality to ensure you are using it to its greatest potential.	North Studio 3
	<b>VISUAL 8.1.0 Major Enhancements Overview</b> — Major enhancements demonstration. Attend this live demonstration of the core VISUAL 8.1.0 features, including UDF Dashboards, Performance Leadtime Management, Query Tool, Estimating, Lifecycle Notifications.	North Studio 6
	<b>SQL Server Management and Performance Tuning</b> — We will review the benefits and techniques for running VISUAL in a Virtual or Terminal Server environment. Both are a good way to reduce hardware requirements, and allow for remote access.	North Studio 13
<b>10:00 AM—10:15 AM—Break — North Tower Foyer</b>		
10:15 AM — 11:15 AM Concurrent Sessions	<b>Cash Management</b> — Single and multi-currency environment- how to use VISUAL and Revaluation to assist in managing cash.	North Studio 1
	<b>VISUAL's Multi-Site Capabilities</b> — Learn how the new Multi-site functionality supports financial management across multiple companies and sites in one database. Gain insight in determining if Multi-site is right for your company. Discover reasons for using Entities vs. Sites, configuration approaches and planning the transition to VISUAL Multi-site capabilities.	North Studio 2
	<b>Vendor / Customer Inquiry Window and Document Lifecycle</b> — An overview of the Customer Inquiry and Vendor Inquiry Windows. Document Lifecycle will also be discussed in the context of each.	North Studio 3
	<b>Use VISUAL to Drive Profitability</b> — Learn the Tools and Techniques within VISUAL that can impact your bottom line. Gain the visibility you need to improve various aspects of your business that directly affect profitability.	North Studio 6
	<b>Cloud Solutions for VISUAL</b>	North Studio 13

**11:30 AM—12:30 PM—One-on-One Consulting — Patio Studio 1**

11:30 AM — 12:30 PM Concurrent Sessions	<b>Using Estimating to Win More Business</b> — Getting your estimated costs correct and then using pricing techniques to maximize margins. Using the Estimating Window for costs, prices, quote follow-ups. This tool has multiple applications. Recommended for all but the most experienced Estimators.	North Studio 1
	<b>Shop Floor Data Collection - Best Practices</b> — Explore how to use, monitor, control, and adjust the data being supplied by your Labor Barcode Entry. Learn to react to incorrect transactions soon after they occur to help keep accurate costs and schedules.	North Studio 2
	<b>Inventory Physical &amp; Cycle Counts</b> — Whether you are employing year-end physical or cycle count there will be both an operational and financial impact when the count is complete. This session examines the process and approaches for conducting an effective count.	North Studio 3
	<b>Supplier Performance Management - A Continuous Improvement Program</b> — Learn how managing the performance of your suppliers - a critical component of overall supply and demand chain management - can have a material impact on your company's revenue growth and operating margin.	North Studio 6
	<b>Developing Workflows that Streamline Your Process</b> — Understanding the capabilities of Workflow in VISUAL to streamline processes and enforce controls.	North Studio 13

**12:30 PM — 1:30 PM Lunch — Greenwich & Compass**

**1:30 PM — 2:30 PM—One-on-One Consulting — Patio Studio 1**

1:30 PM — 2:30 PM Concurrent Sessions	<b>Implementing RMA'S with a Look Toward Enhanced Features in 8.x</b>	North Studio 1
	<b>Consignment Inventory</b> — Whether you're holding customer-owned material in-house, or have your material at your suppliers warehouse, you'll want to understand how VISUAL's Consignment Inventory functionality can help you manage it all!	North Studio 2
	<b>VMCAUG Meeting - Visual Manufacturing Canadian User Group Meeting and AGM.</b> This is our fall meeting for all Visual users, non-members are welcome. In this session we'll provide an overview of VMCAUG, why you should be a member, and we'll hold a series of roundtable discussions on topics related to Visual.	North Studio 3
	<b>VISUAL 8 Dashboard and Home Page</b> — See the new Dashboarding features in VISUAL 8.0 - Sales, Production, Finance - complete with drill down.	North Studio 6
	<b>Best Practices for Using Engineering Change Notice</b> — This session will provide instruction on how to properly utilize the Engineering Change Notice functionality in VISUAL. Learn how to control revision stages, drawings, parts, and other items along with setting up electronic approvals.	North Studio 13

**2:30 PM — 4:30 PM—One-on-One Consulting — Patio Studio 1**

**2:45 PM — 3:00 PM Break — North Tower Foyer**

2:45 PM — 3:45 PM Concurrent Sessions	<b>Optional Modules 3rd party Products and Synergy Extensions</b> — Something missing in your current tool set? Looking to improve your business processes and workflows by adding necessary tools to your VISUAL portfolio? Come find out what is available to increase your productivity and profit!	North Studio 1
	<b>Electronic Payment Options for Vendors and Customers</b> — This session reviews Synergy's ACH Electronic Payment processing module, and helps you understand if there are potential cost savings in your company through its use.	North Studio 2
	<b>VMCAUG Meeting- Visual Manufacturing Canadian User Group Meeting and AGM.</b> This is our fall meeting for all Visual users, non-members are welcome. In this session we'll provide an overview of VMCAUG, why you should be a member, and we'll hold a series of roundtable discussions on topics related to Visual.	North Studio 3
	<b>Sales Order Management</b> — Overview of the Sales Order Entry process starting with a review of standard Sales Order Entry, Order Management, and various areas in Customer and Part Maintenance that affect the flow of data in either.	North Studio 6
	<b>Reviewing VISUAL in a Virtual and Terminal Services Environment</b> — We will review the benefits and techniques for running VISUAL in a Virtual or Terminal Server environment. Both are a good way to reduce hardware requirements, and allow for remote access.	North Studio 13

**4:00 PM — 5:00 PM Concurrent Sessions**

4:00 PM — 5:00 PM Concurrent Sessions	<b>Custom Report Development Advanced Techniques</b> — So, you need a custom report? Should you modify an existing QRP, write a Crystal Report, a report in MS Access, or Reporting Services? This session will discuss various report writing options and discuss the pros and cons of each method. It will also cover report writing basics and database connectivity. Creating SQL views is the best way to create data objects for custom reporting. Creating SQL extended queries to add information to standard VISUAL reports. Synergy Smartviews will also be covered briefly.	North Studio 1
	<b>Sales and H(G)ST</b> — How to avoid the pitfalls and hardships? How to use Visual to aid you in this process?	North Studio 2
	<b>VISUAL 8.1.0 Leadtime Lifecycle and Estimating Improvements</b> — Learn about the lead-time performance management functionality in VISUAL 8.1.0 and hear how it can help you identify non-standard business processes, take action, and drive improvement. See how your existing estimating spreadsheets can be integrated into VISUAL.	North Studio 3
	<b>Enhancement Round Table</b>	North Studio 6