



PROFITOOL USER GROUP 2008 ANNUAL MEETING AGENDA

Monday, Tuesday, and Wednesday, September 22, 23, & 24, 2008
[Embassy Suites Hotel](#) • 10250 East Costilla Avenue • Centennial, Colorado
Reservations: 1-800-654-4810 (Ref.: PTUG Conference)

Facilitator: David Crofoot

MONDAY, SEPTEMBER 22ND

- 11:45 a.m. – 1:00 p.m. **Lunch** – *served in Atrium*
- 1:00 p.m. – 1:15 p.m. **Opening Remarks** – *Bellevue Room*
- 1:15 p.m. – 2:45 p.m. **State of Profitool** – *Gary Tamblin and Keith Brown*
- 2:45 p.m. – 3:00 p.m. **Break** – *refreshments*
- 3:00 p.m. – 4:00 p.m. **Session Topic** – *Profitool Application Features*
Presented by: Profitool, Inc.
- Certified payroll report enhancements based on the new CERTIFY\$DATA file
 - E-mailing of pay stubs to employees
 - Implementing simplified vacation/sick report
 - Direct pay
 - AIA billing (*generate invoice in one step*)
 - SMR viewer
- 4:00 p.m. – 4:10 p.m. **Break**
- 4:10 p.m. – 5:30 p.m. **Session Topic** – *Technology*
Presented by: Profitool, Inc.
- Database interfaces, e.g., MySQL & Oracle
 - SA Export
 - Value of Profitool Query Server (PQS)
 - Web Interface
 - Info Links
 - Visual Page Layout Editor (*new SCFM for Web*)
- 6:30 p.m. – 7:30 p.m. **Social Hour**
- 7:30 p.m. – **PTUG Conference Dinner**
[\(Cherokee Ranch & Castle\)](#)



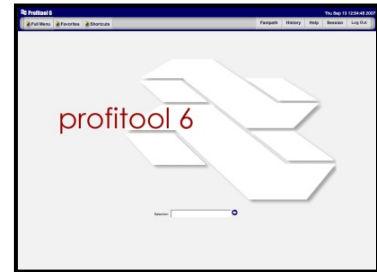
TUESDAY, SEPTEMBER 23RD

After receiving feedback from you, the format for this morning's sessions will be "roundtable" discussion (one large group, rather than three smaller groups) with a moderator from the Profitool staff to record and offer alternative insights. The subject matter for the sessions was also determined from input received by you. Thank you...

8:30 a.m. – 9:15 a.m. **"A" Session Topic – Web Interface Issues**
(Roundtable Discussion)

Lead by: Members of Profitool Staff

- Lookups with drop-down menus
- Converting custom screens
- Considerations when converting to PT6 Web
- Creating new custom screens (C/D ISAM or tables)
- Dual operating modes (Character / GUI)
- Improve speed
- Share shortcuts and favorites across LFDs



9:15 a.m. – 9:25 a.m. **Break**

9:25 a.m. – 10:05 a.m. **"B" Session Topic – Application Issues**
(Roundtable Discussion)

Lead by: Members of Profitool Staff

- Inter-company Transactions
- Security/Disaster Recovery
- Identify duplicate entries in Profitool lists (vendor, client, other)
- Document imaging
- Loading into SQL database
- Pricing of SQL license for PQS
- Custom documentation for custom screens with comparison of old/new
- Exporting PR info to HR – skill set information
- Voiding checks
- Re-issuing checks
- Issuing lost W-2s
- New billing using COST\$DATA – pros and cons
- Obstacles changing from T&E system to COST\$DATA billing
- Consideration of companies for financial reporting
- Altering TR type in posted batch
- CERTIFY\$DATA – how do you correct wrong entry
- Outsourcing new Profitool applications under Profitool supervision
- Outsourcing Admin Functions

10:05 a.m. – 10:20 a.m. **Break – refreshments**



TUESDAY, SEPTEMBER 23RD (CONT.)

10:20 a.m. – 11:00 a.m. **“C” Session Topic –** *Profitool 6 Enhancements
(Roundtable Discussion)*

Lead by: Members of Profitool Staff

- Print screen Icon on PT6 Web screens
- Multiple addresses (*offices*) for unique vendor/client
- Improve file upload functionality
- Configuration parameters on scrolling screen
- New AIA format
- SMR viewer with search of database
- Interface to FRx or F9
- Standard account of vendors' screen
- Mail/merge capability with OpenOffice
- Vendor lookup – display ABN number
- Increase length of MEMO field for invoice input
- Specify terms (*14, 30 days*) on invoice input
- GUI purchasing and expediting system



11:00 a.m. – 11:10 a.m. **Break**

11:10 a.m. – 12:00 p.m. **Session Topic –** *Revitalization of Profitool at Mainzeal*
Presented by: John Bolland, Mainzeal Construction

- Purchase Orders
- Subcontracts
- Variations (*CRN's*)
- Client Claims
- Implementation of Payroll, Asset Register and Depreciation, and Equipment Rental

12:00 p.m. – 1:15 p.m. **Lunch – served in Atrium**

1:15 p.m. – 4:00 p.m. **Session Topic –** *Technology Workshop*
Presented by: Members of Profitool Staff

This workshop is an open forum, intended to discuss and demonstrate various technologies that are incorporated into the latest version of Profitool 6, as well as those that are planned in coming months. Some, of which, were highlighted in the Monday afternoon Technology session.



WEDNESDAY, SEPTEMBER 24TH

- 8:30 a.m. – 9:20 a.m. **Session Topic – *A Profitool API Example and a Field Timesheet***
Presented by: Simon Taylor, Unisolve
- **API Example**
 - ✓ A proof-of-concept that demonstrates retrieving data from Profitool, using direct hooks into the Profitool application
 - ✓ A discussion of how this same mechanism can be used to send data to Profitool and have the Profitool software apply its business rules on the data, allowing or refusing the update as necessary
 - **Field Timesheet**
 - ✓ Field Timesheet – web-based payroll time entry, which supervisors later approve and upload into Profitool
- 9:20 a.m. – 9:25 a.m. **Break**
- 9:25 a.m. – 10:15 a.m. **Session Topic – *Electronic Payments to Your Employees and Vendors***
Presented by: Eric Newton and Betsy Berlin of Comdata Corporation
- Use direct deposit to put funds in a non-banked employee debit card account and eliminate printing weekly pay checks
 - Pay vendors electronically and turn your accounts payable department into a revenue generator for your company
- 10:15 a.m. – 10:30 a.m. **Break – refreshments**
- 10:30 a.m. – 11:20 a.m. **Session Topic – *pt filter-monitor bridge, WIKIS, and Web Directions***
Presented by: Simon Taylor, Unisolve
- **Pt Filter-Monitor Bridge**
 - ✓ A system that allows ptfiler scripts to communicate with the report monitor and perform specific tasks with the filtered data
 - **An In-House Wiki**
 - ✓ Setting up a wiki in your organization
 - Why it is a good idea
 - How it can harness the collective intelligence of your workforce and improve collaboration
 - Packages you can use
 - **Web Directions**
 - ✓ Ext JS – a brief review of this high-powered Javascript toolkit for building web applications
- 11:20 a.m. – 11:25 a.m. **Break**
- 11:25 a.m. – 11:45 a.m. **Session Topic – *PTUG Business Meeting (members only)***
Facilitator: David Crofoot
- 11:45 a.m. – 12:00 p.m. **Break**
- 12:00 p.m. – TBD **Open Discussion – *Dialog with Profitool***
Facilitator: David Crofoot
Question and Answer Follow-up Session