



# User Summit 2007 Agenda

## Monday

4:00 - 7:00

**Advance Registration and Kick-off Cocktail Event, Marriott Copley, 3rd Floor Atrium**

Register in advance to beat the crowds, sign up for one-on-one sessions with Professional Services, meet your favorite member of our Support team, enjoy cocktails, live jazz piano... and giveaways!

## Tuesday

**Training sessions** | **Client presentations & general sessions**

**Salon G**

**Salon H, I, J**

8:00 - 8:30

**Registration/Continental Breakfast**

8:30 - 9:30

**Welcome to the OpenAir User Summit 2007**

Morris Panner, CEO OpenAir

9:30 - 10:30

**Foundations of Project Management in OpenAir**

OpenAir & George LaDue, GXS

**Resource Management in OpenAir**

OpenAir & David Hoff, Optimus Solutions

10:30 - 11:30

**Project Accounting in OpenAir**

OpenAir & Jodi Cicci, TOP Step Consulting

11:30 - 12:00

**Managing Resources in a Dynamic Environment**

George LaDue, GXS

**Partner Management in OpenAir**

Bill Holzendorf, Altiris

12:00 - 1:00

**Lunch** Salon F

1:00 - 2:00

**A Day in the Life of an OpenAir Administrator:  
Overview, Tips & Tricks**

Jodi Cicci, TOP Step Consulting

2:00 - 3:00

**Introduction to Reporting in OpenAir**

OpenAir

**Show Me the Money: Timesheets, Expenses,  
and Invoicing in OpenAir**

OpenAir & John Carr, ICS

3:00 - 3:30

**Coffee Break** Sponsored by TOP Step Consulting

3:30 - 4:00

**Bookings vs Assignments: Which is Right for You?**

Ronn Breaux, DCC Services

**Integration Case Study (SFDC and GL)**

Jolene Chan, Bluewolf

4:00 - 5:00

**Advanced Reporting in OpenAir**

OpenAir & Chris Page, Accept Software

**OpenAir Administration - Part I**

OpenAir & Jignesh Jain, Niteo

5:00 - 7:00

**Networking Reception, Marriott Copley, 3rd Floor Atrium**

Sponsored by InfoMentis. Open bar, hors d'oeuvres, live music



# User Summit 2007 Agenda

## Wednesday

Training sessions | Client presentations & general sessions

	Salon G	Salon H, I, J
8:00 - 8:30	<b>Continental Breakfast</b>	
8:30 - 9:30	<b>OpenAir Administration - Part II</b> OpenAir	<b>Financial Forecasting in OpenAir</b> OpenAir and Jodi Cicci, TOP Step Consulting
9:30 - 10:00	<b>Why I Breathe Easier with OpenAir</b> Gina DeGandio and Bette Hickey, Novations	<b>Scaling OpenAir Within a Growing Company</b> Jolene Chan, Bluewolf
10:00 - 10:30	<b>Coffee Break</b>	
10:30 - 11:30	<b>Power User Panel: Q&amp;A Session</b> Moderator: Brian Martin, OpenAir Panelists: Ronn Breaux, DCC Services; Jodi Cicci, TOP Step Consulting; George LaDue, GXS; Jonathan Schultz, Court Square Data Group; Marie Wolfe, OpenAir	
11:30 - 12:00	<b>10 Hottest Tips for Sustaining High Utilization</b> Randy Mysliviec, RTM Consulting: Recognized by TPSA as an expert in global resource management	<b>Deploying the Resources Module</b> Kim Williams-Czopek, Duo Consulting
12:00 - 1:00	<b>Lunch</b> Sponsored by RTM Consulting, Salon F	
1:00 - 2:00	<b>Advanced Resource Management</b> OpenAir	<b>1:00 - 1:30</b> <b>Deploying OpenAir in Off-Shore Environments</b> Joe Longo, MetricStream
		<b>1:30 - 2:00</b> <b>OpenAir in Your Ecosystem</b> Larry Goldberg, OpenAir; Karen West, Intacct; Michael Maszka, Workday
2:00 - 3:00	<b>Professional Services Executive Panel</b> Moderator: Scott Fletcher, Practice Director, InfoMentis & Board Member, PSVillage Panelists: Joe Longo, VP of Professional Services, MetricStream; Keith McInish, VP of Professional Services, Seagull Software; Hans Otharsson, VP of Professional Services, Software AG; Jolene Chan, VP of Services, Bluewolf; Michael Maszka, Director of Professional Services, Workday	
3:00 - 3:30	<b>Coffee Break</b>	
3:30 - 4:00	<b>OpenAir Product Review: Greatest Hits of 2007 and 2008 Product Roadmap</b> Dan Grace, OpenAir	
4:00 - 4:30	<b>Closing Remarks</b> Morris Panner, OpenAir; Jodi Cicci, TOP Step Consulting	
4:30 - 7:00	<b>Farewell Drinks at Bar 10 (Westin Copley)</b> Appetizers and open bar	

# Session Descriptions Tuesday

**Training sessions** | **Client presentations & general sessions**

---

## **Foundations of Project Management in OpenAir**

Training on the Projects Module, including advanced project management functionality

## **Resource Management in OpenAir**

Overview of Resources Module, including utilization reports

---

## **Project Accounting in OpenAir**

Overview of billing, revenue recognition and project profitability

---

## **Managing Resources in a Dynamic Environment**

Case study by GXS on the use of Schedule Requests to manage global resources in OpenAir

## **Partner Management in OpenAir**

Case study by Altiris, a division of Symantec, on using OpenAir to manage a large partner workforce

---

## **Lunch**

---

## **A Day in the Life of an OpenAir Administrator: Overview, Tips & Tricks**

Jodi will discuss the many roles that an OpenAir Admin can fill in a company, provide tips and tricks, and offer guidance on how to make your life easier.

---

## **Introduction to Reporting in OpenAir**

How to create summary and detail reports in OpenAir

## **Show Me the Money: Timesheets, Expenses, and Invoicing in OpenAir**

Use of Timesheets, Expenses and Invoices Modules, including relevant Company Settings, un-approving/deleting transactions, modifying invoices and invoice layouts, and beyond

---

## **Coffee Break**

---

## **Bookings vs Assignments: Which is Right for You?**

Case study by DCC Services on using bookings and assignments in OpenAir

## **Integration Case Study (SFDC and GL)**

Case study by Bluewolf on its salesforce.com and OpenAir Quickbooks integration

---

## **Advanced Reporting in OpenAir**

Advanced reporting functionality, including a review of Advanced Reports, calculated fields, custom fields and hierarchies

## **OpenAir Administration - Part I**

How to create projects, clients and users, roles vs. filter sets, how to use schedule requests, leave accrual, customizing your account

# Session Descriptions Wednesday

**Training sessions** | **Client presentations & general sessions**

---

## **OpenAir Administration - Part II**

How to use assignment groups, job codes and rate cards, email templates, approval processes, and the bulk user change wizard

## **Financial Forecasting in OpenAir**

How to forecast billings and revenue in OpenAir

---

## **Why I Breathe Easier with OpenAir**

Case study by Novations on their use of OpenAir, including a review of their Great Plains integration

## **Scaling OpenAir Within a Growing Company**

Case study by Bluewolf of rolling out OpenAir to a broader base of users

---

## **Coffee Break**

---

## **10 Hottest Tips for Sustaining High Utilization**

Learn how to improve utilization of your billable and non-billable resources from one of the foremost experts in Resource Management, Randy Mysliviec

## **Deploying the Resources Module**

Case study by Duo Consulting on deploying the Resources module more than one year after going live with OpenAir

---

## **Lunch**

---

## **Advanced Resource Management**

Using skills database, conducting custom searches, managing historical and forecasted utilization, incorporating schedule exceptions, vacation and sick time

## **Deploying OpenAir in Off-Shore Environments**

Joe will share the best practices he discovered from his recent deployment of OpenAir in India for MetricStream. Also, from the standpoint of a 6 year OpenAir user at various companies, Joe will share tips and tricks to ensure you are getting the most out of OpenAir.

## **OpenAir in Your Ecosystem**

Learn how you can optimize and expand your use of OpenAir through OpenAir's partnership and integration capabilities