

Clifton Park Hilton Garden Inn, NY 12065

22-24 October 2019

Tuesday—Thursday

www.EXEControl.com 518-688-8700 | 9 Corporate Drive, Clifton Park NY 12065

User Conference 2019

A MUST ATTEND EVENT!

Help your business reach its potential!

Be first to hear of the new features available for the EXEControl Community:

- ♦ Your data made accessible to most third-party applications
- ♦ The latest in network security
- ♦ Collaboration among staff members in multiple locations

Each session presents significant details and information. You will want to bring enough people to attend all three workshops every session!

MEET - N - GREET STAFF

6:00pm - 7:30pm Tuesday

EXEControl Office

DAY SESSION WORKSHOPS

8:15am - 4:00pm Wednesday

The Hilton Garden Inn

CLIENT FACILITY TOUR

9:00am - 10:30am Thursday

Macaran Printed Products

Featured Speakers



Matt Episcopo
Leadership and Communication



Beth Weise Moeller
Owner Interactive Media Consulting



Brian Cram
Tech Support Engineer Rocket Software



Allan Robison
EXEControl President, CEO

AND

**10+ additional
staff member
presentations**

User Conference 2019

MEET - N - GREET

Tuesday October 22

6:00pm - 7:30pm

EXEControl Global Solutions

9 Corporate Drive | Clifton Park NY 12065

www.EXEControl.com 518-688-8700

EXEControl Global Solutions will be hosting an informal open house at our corporate office. Please come, have some food, and meet our staff. EXEControl Global Solutions has hired several new staff members since our last User Conference, so we hope you will take the opportunity to meet them.



Open House

Held at corporate office

New Staff Members

Food and Drink

User Conference 2019



Wednesday | October 23

8:15-9:00	<i>Registration & Breakfast</i>		
9:00-10:00	Microsoft Office 365 Collaboration Presented By: Craig Kimbrough & Mark DiPofi	EXEControl on All Your Screens Presented By: Christopher McCoy	Web-based Customer Portals Presented By: Beth Moeller, IMC
10:00-11:00	<i>Keynote Speaker</i>		
11:00-12:00	Network Security Presented By: Matthew Lucas & Brandyn Paullin	Integrating Customer Communications Presented By: Krzysztof Wolcz	New and Noteworthy in EXEControl Presented By: Michelle McKenzie
12:00-1:30	<i>Lunch & Presentation</i>		
1:30-2:30	Peace of Mind: Disaster Recovery And Cloud Storage Presented By: James Segretto & Robert Soucek	General Ledger: The Heart of Accounting Presented By: Jonathan Sternfeld	Introducing D3 with mvBASE Presented By: Todd Hess
2:30-3:00	<i>Refreshment & Snack Break</i>		
3:00-4:00	Email Management & Security Presented By: Joseph Gaither & Matthew Lucas	EXEControl in 2020 Presented By: Allan Robison	Unlocking D3: Report Writing & Other Interfaces Presented By: Paul Flanders & Brian Cram

Presentation Descriptions

Session One: 9:00 - 10:00

Microsoft Office 365 Collaboration – Presented by: Craig Kimbrough & Mark DiPofi

How can companies benefit from using Microsoft Teams? Microsoft Teams enables companies to chat, hold online meetings with video conferencing, share files, manage projects and work flows, all within one single application. Here we will demonstrate how we use Microsoft teams to collaborate with other groups and/or companies.

EXEControl on All Your Screens – Presented by: Christopher McCoy

As the capability of modern devices grows, wouldn't it be convenient to have access to EXEControl on your mobile device and your tablet? EXEControl's new features allow you to access your business from anywhere. Keep tabs on cash flow, sales, production, and more, from any device. Ideal for owners, salespeople, managers, or anyone who needs easy access and real-time data. This session will demonstrate the new standard mobile features of EXEControl.

Web-based Customer Portals – Presented by: Beth Moeller, IMC

We are approaching the year 2020, and by now everyone should have a web-based customer portal. The reality is that it is not that hard to create. EXEControl's data can be made accessible, bi-directional, to your website. That is the easy part; the hard part is how to make a user-friendly and safe site that can be used by your customers. To assist your efforts, EXEControl Global Solutions has asked Beth Moeller, a leading expert in the field of website development, to come and share tips for a user-friendly and safe customer portal site.

Keynote Speaker: 10:00 - 11:00

How to Gain the Upper Hand – Presented by: Matt Episcopo, Leadership and Communication Expert

Gain the Upper Hand: World class training in Leadership, Communication, Relationship Building, Negotiation, Body Language and Persuasion. Learn the secrets behind identifying and decoding non-verbal behavior. Gain the insight needed to be more effective and tactful in your interactions with others. Build the credibility, trust and solid relationships necessary in order to get others to say "yes" to your ideas, products, and services.

Session Two: 11:00 - 12:00

Network Security – Presented by: Matthew Lucas & Brandyn Paullin

Network Security is the practice of preventing and protecting against unauthorized intrusions into corporate environments and networks. We will be covering common practices that allow you to take the necessary physical and software preventative measures to protect your business. Taking the proper security measures will help protect your corporate infostructure and prevent the loss of hard-earned time and money that is invested into reacting to these malicious attacks. As we hear more instances of cyber-attacks every day, it is our goal to share with each user how proper preventions can be taken to keep your business from becoming another statistic we hear about on the nightly news. You worked hard for your business, why not learn to protect it?

Integrating Customer Communications – Presented by: Krzysztof Wolcz

EXEControl's Customer Relationship Center is a feature for managing all your company's interactions with customers and potential customers. The goal is simple: Improve business relationships. By using EXEControl's integrated email, phone, texting, and faxing features, the system helps companies to stay connected with customers, to streamline processes, and to improve profitability.

Track every interaction in one place so whenever you communicate with your customers, you have all of their details in front you. You can quickly and easily pick-up the conversation where you – or anyone else in your company – left off. Your customers are important to you, make sure they feel that way!

New and Noteworthy in EXEControl – Presented by: Michelle McKenzie

Every year EXEControl Global Solutions adds about half a million dollars in new development to the EXEControl software. Come and learn what has been added since our last user conference.



Lunch : 12:00 - 1:30

EXEControl and Rocket Software Opening New Opportunities – Presented by: Brian Cram & Allan Robison

Session Three: 1:30 - 2:30

*Peace of Mind: Disaster Recovery and Cloud Storage – Presented by:
James Segretto & Robert Soucek*

In this session we will take a plunge into the exciting world of business continuity and backup recovery. Learn how to minimize the impact of a disaster on your company's Information Technology Infrastructure. Learn the benefits of moving to cloud\remote storage for your company data. See how having a backup plan can save you time and money.

General Ledger: The Heart of Accounting – Presented by: Jonathan Sternfeld

Take a deep dive into the EXEControl General Ledger module. Learn about account structure and usage flags, then see what menu options are available. Get creative with user-defined reporting, then reduce your work load by defining recurring General Journal entries.

Introducing D3 with mvBase – Presented by: Todd Hess

EXEControl Global Solutions has spent the last two years working with Rocket Software to bring the best features of mvBase to Rocket's D3 database. For the first time ever, clients do not have to choose between mvBase's powerful workstation tools and D3's open database connectivity. This session will discuss what we have been working on, what Rocket Software now offers, and how you can take advantage of the new D3 with mvBase enhancements.



Refreshment & Snack Break: 2:30 - 3:00

Session Four: 3:00 - 4:00

Email Management & Security – Presented by: Joseph Gaither & Matthew Lucas

Are you getting the most out of Outlook and the many features it provides? Are you protecting your email as you access it from so many devices? Do you have a method to store emails long-term without having 50,000+ emails in your inbox or deleted folder? During this workshop we will address these questions as well as explore best practices for email management and security.

EXEControl in 2020 – Presented by: Allan Robison

The 2019 User Conference is centered around all the new tools and applications that have been made available to the EXEControl Community. While you now have many new features and opportunities to take advantage of, there is never a lack of new objectives for the EXEControl system. This workshop will be a bi-directional discussion of what is next for EXEControl and the supporting services that come with it.

Unlocking D3: Report Writing & Other Interfaces – Presented by: Paul Flanders & Brian Cram

This workshop will explore some of the many ways moving to D3 opens doors for using third-party applications and tools. Whether your needs are report writing, business intelligence, or third-party application integration, there are tools available in D3 to make the connection. We will take some off-the-shelf products and put them through the test.



User Conference 2019

PLANT TOUR AT MACARAN PRINTED PRODUCTS

Thursday October 24
9:00am - 10:30am

Macaran Printed Products

18 New Courtland Street | Cohoes, NY 12047

Macaran Printed Products is a manufacturer of labels who has been using EXEControl for 15+ years. Over those years, Macaran's products and services have changed and so has EXEControl.

During the tour you will get the opportunity to see their large volume flexographic printing presses as well as their best in class digital on-demand printing press. Find out how Macaran manages customer revisions, last-minute change requests, and a complex quoting process.

Macaran's sister company, W.N. Van Alstine & Sons, Inc., is a distributor of packaging material. Housed in the same facility as Macaran Printed Products, you will get the opportunity to see how these drastically different businesses utilize a single system

W.N. VAN ALSTINE & SONS

W.N. Van Alstine & Sons, Inc. is a distributor of packaging material. Housed in the same facility as Macaran Printed Products, you will get the opportunity to see how these drastically different companies utilize a single system EXEControl) to meet the demands of both.



User Conference 2019

Presenters

Allan Robison
President, CEO
EXEControl Global Solutions



Allan joined EXEControl Global Solutions back in 1982 as an entry level programmer. Allan has performed every job position at EXEControl since that time and is now the President, CEO, and Owner of EXEControl Global Solutions. Allan is Certified in Production and Inventory Management (CPIM), a member of APICS for 25+ years and a member of CEN (Chief Executive Network for Manufacturers) for about 20 years, Allan has served on several board positions and in community service projects.

Craig has over 15 years working as a network and system administrator. Craig has been a member of the EXEControl Global Solutions team for almost ten years and functions as the Manager of Networking Services.

Prior to working for EXEControl Global Solutions, Craig worked for Proctors Theater as their lead, in-house network specialist.

Craig Kimbrough
Manager of Networking Services
EXEControl Global Solutions



Brandyn Paullin
Network Specialist
EXEControl Global Solutions



Brandyn joined the EXEControl team as a Network Specialist in 2018. Brandyn obtained an associate degree in Networking Security from the University of North Western Ohio. Brandyn has been a member of the Ohio Army National Guard and has worked in the IT industry since 2012. He works out of one of our remote office locations in Fort Wayne, Indiana.

User Conference 2019

Presenters

Christopher McCoy
Business Software Analyst
EXEControl Global Solutions



Christopher graduated from Siena College with a B.S. in Computer Science. He has been programming and working in the I.T. sector for the past six years. He became part of EXEControl Global Solutions in 2018 as a Business Software Analyst. In addition to support and ERP development, Chris has been on the forefront of EXEControl Global Solutions' initiative to make solutions accessible on all platforms.

James Segretto
Network Technician
EXEControl Global Solutions

James has worked as part of the Network Support group for EXEControl Global Solutions for 2 years, as a Network Technician. Jimmy has a bachelor's degree from SUNY Oswego in Information Science and an associate degree from Onondaga Community College in Information Science with a specialization in IT.



Joseph Gaither
Network Technician
EXEControl Global Solutions



Joseph joined EXEControl Global Solutions in 2017 as a Network Technician. Joe received a Bachelor's of Science in Computer Science and Applied Math from SUNY Albany. Since joining, Joe serves as frontline support for the networking department.

User Conference 2019

Presenters

Jonathan Sternfeld
Senior Applications Developer
EXEControl Global Solutions



Jonathan graduated from SUNY Albany with a B.S. in Business Administration. As a 25 year seasoned employee, Jonathan functions as a Senior Developer with EXEControl Global Solutions. Jonathan is also a member of APICS, is Certified in Production and Inventory Management (CPIM) through that organization, and is currently serving as an Executive VP on the Albany chapter's Board of Directors.

Chris with a Master of Science degree in Computer Science, joined EXEControl Global Solutions in 2006 as an Applications Developer. Chris has over 20 years of programming experience. Chris specializes in multi-platform system integration. Currently, Chris is EXEControl Global Solutions' Senior Lead Developer in .NET and third party software integration.

Krzysztof Wolcz
Senior Applications Developer
EXEControl Global Solutions



Matt joined EXEControl Global Solutions in 2016 as a Network Technician. Prior to working at EXEControl Global Solutions, Matt provided technical support in a B2C environment in addition to working as a freelance web developer and SEO specialist. At EXEControl Global Solutions, Matt leads our VoIP deployments, many customer relations, and tier two support needs.

Matthew Lucas
Network Technician
EXEControl Global Solutions



User Conference 2019

Presenters

Todd Hess
Director of Professional Services
EXEControl Global Solutions



Todd is EXEControl Global Solutions' Director of Professional Services. Todd oversees all client implementations, training and consulting. He has been with EXEControl for over 15 years, has provided professional services to over 70 clients and has been lead implementer on over two dozen new implementations. He holds a Certification in Production and Inventory Management from APICS. In 2011, he received APICS' Member Service Award. Todd has also received the Fundamentals of Payroll Certification from the American Payroll Association. Todd has a Bachelor's degree in Applied Science and a Master's degree in Business Administration.

Michelle graduated with a Bachelor's degree in Computer Science from Russell Sage College and began her employment with EXEControl Global Solutions as a member of the programming staff in 1993. She currently serves as Director of Software Services. As a 25+ year veteran of EXEControl Global Solutions, Michelle is highly knowledgeable regarding the EXEControl ERP/CRM software package.

Michelle McKenzie
Director of Software Services
EXEControl Global Solutions



Paul joined EXEControl Global Solutions in 2017 as a Business Software Analyst with the primary responsibilities of software support and professional services. Paul came to EXEControl with 18 years of software development experience in the banking and manufacturing industries and served in the U.S. Coast Guard from 1995 to 1999.

Paul Flanders
Business Software Analyst
EXEControl Global Solutions



User Conference 2019

Presenters

Robert Soucek
Network Specialist
EXEControl Global Solutions



Robert joined EXEControl last year and is one of the newest members of the Networking Support Team. He is CompTIA A+ certified and has certificates of completion of training in VMware VSP and VTSP. His background consists of being in the Army Infantry for 6 years, then the National Guard as an IT Specialist for an additional 4 years. Robert works out of EXEControl's Charlotte office.

Mark has 14 years in network and system administration, 9 years managing teams, 6 years with EXEControl, and two years functioning as EXEControl Global Solutions' Regional Operations Manager. Mark splits his time between tier two and three support assistance and helping EXEControl Global Solutions expand their remote offices.

Mark Dipofi
Regional Operations Manager
EXEControl Global Solutions



Jennifer Mazzariello
Office Manager
EXEControl Global Solutions



Event Coordinator

Jennifer joined EXEControl Global Solutions in 2005, after graduating from SUNY Adirondack Community College with a Marketing Degree. Jennifer has the role of Office Manager, which consists of handling all the internal processes at EXEControl, including Payroll, Accounts Payable & Receivable, and Human Resources. Jennifer also has the task of planning, organizing, and managing all of EXEControl's Corporate events, conferences and outings.

Keynote Speaker



Matt Episcopo

Leadership And Communication Expert Matt Episcopo has redefined the formula for personal power, leadership and business success. Matt knows that the real way to become effective is to build credibility, trust and solid relationships. When we establish trust and credibility, others will say “Yes” to our ideas, products and services.

His efforts have helped companies around the world improve their leadership, customer retention and employee engagement. From start-ups to Fortune 500's, Matt is widely recognized as an energizing and engaging presenter. He is author of the book “How To Gain The Upper Hand, P.O.W.E.R. Tactics That Get Leaders Results”. Real life experience and results are what fuels this relationship-generating powerhouse. A Medal of Honor recipient with more than 21 years of law enforcement experience, Matt will teach you how to engage with virtually anyone. Matt's presentations have been given in Dubai, Singapore, Thailand, Malaysia, Canada, Aruba, Bahamas, as well as across the United States.

Guest Presenter



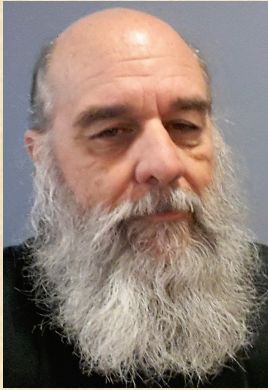
Beth Weise Moeller

Beth holds a BS in Physics and Technical Communication from Clarkson University, an MS in Technical Communication from Rensselaer Polytechnic Institute, and a PhD in Communication & Rhetoric from Rensselaer Polytechnic Institute. Her PhD research concentrated on the design of hypermedia (integration of hypertext, graphics, video, and sound) interfaces for optimum user performance. In 1996, she founded Interactive Media Consulting, LLC, a web design and development firm in Saratoga Springs, NY, that currently services more than 250 clients throughout the Northeast. In 2016, she introduced IMC's latest project, Arts Spark, a digital platform to help artists with the business side of being an artist.

Beth is a Senior Member of the IEEE and a Past-President of the IEEE Professional Communication Society. She is a 2003 graduate of Leadership Saratoga. Beth also currently serves on the Dean's Advisory Council for the School of Arts and Sciences at Clarkson University, as Vice President of the Board at Home Made Theater in Saratoga Springs, and as a Member of the Board of Directors of the Ballston Spa Community Band. She is a Past President of the Board of Trustees for the Saratoga Independent School.

In 2002 Beth was named one of the 40 Under Forty by The Business Review of Albany, NY. In 2004 she was awarded the Emily K. Schlesinger Award for Service to the Society by the IEEE Professional Communication Society. In 2008 she received the Woodstock Award from the Clarkson University Alumni Association, recognizing personal achievement and loyalty to the university.

Guest Presenter



Brian Cram

Brian has been a Pick programmer since 1987. A native of Orange County in Southern California, he has worked for a large and varied user base from Southern California to New York to points in between. He did about a one-year stint in Phoenix, Arizona in 2009-2010, but he's now back in beautiful Southern California, specifically Capistrano Beach.

Brian is now very happily employed by Rocket Software working in the Rocket D3 Support Department as a Tech Support Engineer. Basically, he gets to spend his day on the phone helping people with programming issues and other system problems. When asked if he ever planned to leave Rocket, he said something about "When Arizona freezes over..."

Brian describes himself as about 90% programmer/analyst and 10% therapist. He is comfortable working side-by-side with business owners and/or their management, programming/IT staff, outside financial and other consultants, sales personnel and end users to design, develop, implement and support new applications and revamp or add to existing ones. Brian is particularly good at visualizing solutions to business problems and is adept at determining when a human solution may be more appropriate than a software solution. He's programmed systems operating on many varieties of multivalue databases from D3 to Advanced Pick to r83 to Pick-like systems from ADDS and C. Itoh. He's developed and maintained applications for just about every kind of business or industry that you can think of, and he brings that wealth of experience and perspective with him to Rocket Software.

Registration Form

Early Registration deadline– July 31st— \$175/Person

Take advantage of all the sessions and send 3 people! *SPECIAL RATE of \$425!*

Registration deadline– September 23rd—\$290/Person

Full Name: _____ **Email:** _____

Job Title: _____ **Company:** _____

PLEASE SELECT ALL DAYS/SESSIONS YOU ARE ATTENDING:

- ☐ Tuesday, October 22nd—Meet - N - Greet at EXEControl – 6:00pm – 7:30pm
- ☐ Wednesday, October 23rd—Full Day of Sessions – 8:15am – 4:00pm
- ☐ Thursday, October 24th—Facility Tour & Refreshments – 9:00am – 10:30am

8:15-9:00	<i>REGISTRATION & BREAKFAST</i>		
9:00-10:00	<input type="checkbox"/> Microsoft Office 365 Collaboration	<input type="checkbox"/> EXEControl on all Your Screens	<input type="checkbox"/> Web-based Customer Portals
10:00-11:00	<i>GENERAL SESSION</i>		
11:00-12:00	<input type="checkbox"/> Network Security	<input type="checkbox"/> Integrating Customer	<input type="checkbox"/> New & Noteworthy in EXEControl
12:00-1:30	<i>LUNCH & PRESENTATION</i>		
1:30-2:30	<input type="checkbox"/> A Peace of Mind – Disaster Recovery and Cloud Storage	<input type="checkbox"/> General Ledger: The Heart of Accounting	<input type="checkbox"/> Introducing D3 with mvBase
2:30-3:00	<i>REFRESHMENT & SNACK BREAK</i>		
3:00-4:00	<input type="checkbox"/> Email Management & Security	<input type="checkbox"/> EXEControl in 2020	<input type="checkbox"/> Unlocking D3: Report Writing and other interfaces

☐ Dietary Restrictions & Food Allergies

PLEASE SPECIFY: _____

Cancellation Policy:

If you cannot attend the event, simply notify us of your cancellation before September 23rd, 2019 for a full credit. No shows and cancellations after September 23rd, 2019 will incur a charge for the full registration fee of \$290/person. For cancellations, please email UC2019@execontrol.com