

# Executive Briefing: Adaptability



Adaptable Solutions for the Agile Organization

*The Next Generation of Business Management Software*

**TRAVERSE**<sup>®</sup>

# Now more than ever, adaptability is the key to success

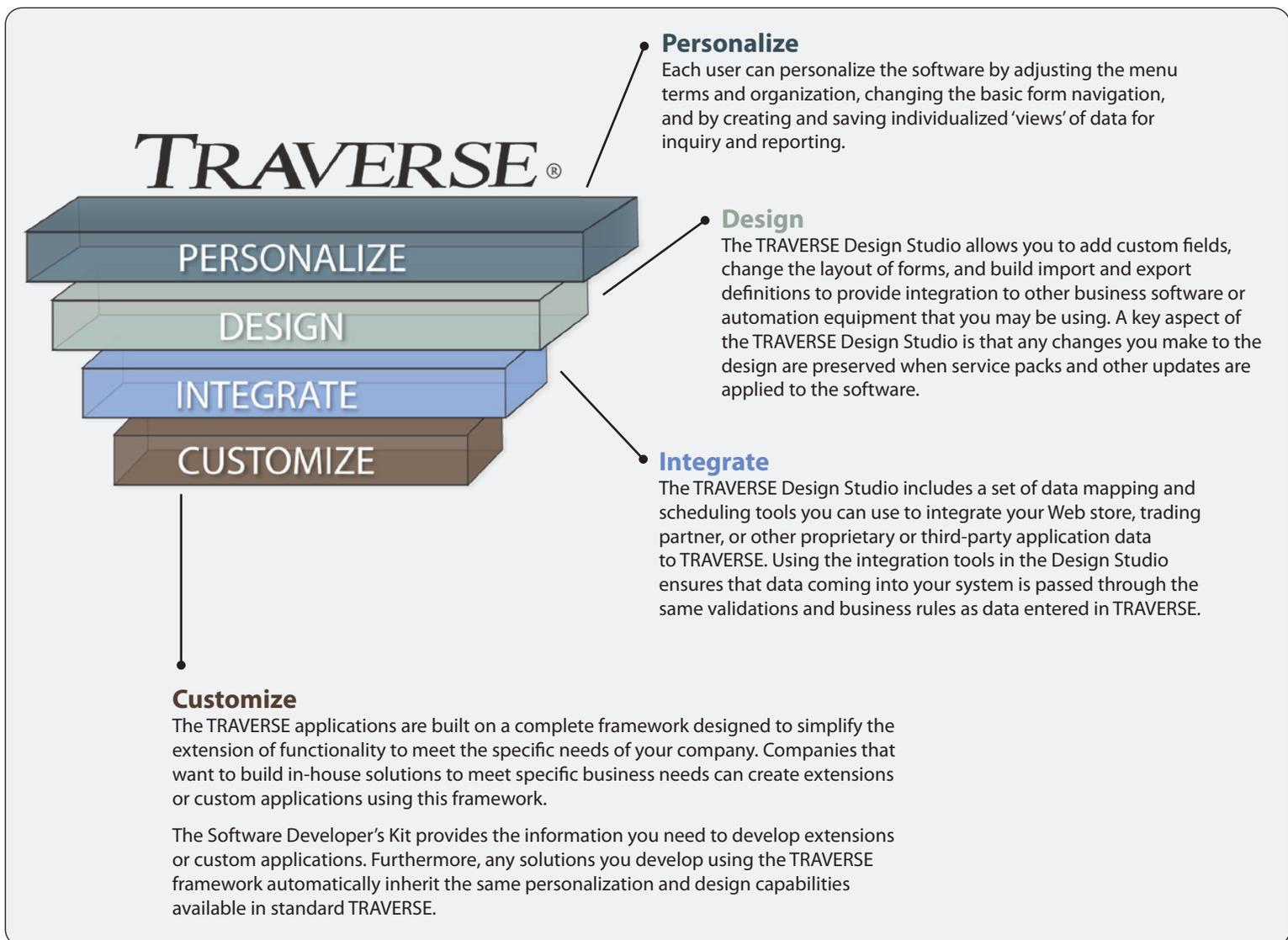
Today's business climate presents new challenges to businesses of all types. To prosper in this rapidly changing environment, organizations must possess the insight to sense shifts in the wind, and be agile enough to capitalize on the opportunities they present.

Indeed, adaptability is the key to long-term success for businesses. Organizations, however, are only as agile as their processes, employees, and software allow them to be. The business software that organizations have come to rely upon in the past is too rigid to meet the needs of today's changing business climate.

Fortunately, TRAVERSE®, the next generation of business software, provides the flexibility your business needs to prosper in turbulent times.

TRAVERSE is a solution that:

- offers unparalleled adaptability that allows you to precisely fit the software to your business practices today, and provides the flexibility to adapt to your changing business needs in the future
- empowers your employees with accurate, timely information in the format they need to be most efficient, anticipate problems and head them off, and identify opportunities and capitalize on them
- integrates easily with the other applications you use in your business
- protects your investment because your custom changes are preserved in future versions of the software



This Executive Briefing explains how TRAVERSE's four layers of adaptability provide unprecedented control of your business management solution across every level of your organization.

The briefing then delves into the tools that deliver the capabilities in each layer, covering TRAVERSE's new methods of personalization and information retrieval, the power of the TRAVERSE Design Studio, the ability of TRAVERSE to integrate with other software, and the ease and security of TRAVERSE customization.

### **Unprecedented adaptability for small- to medium-sized businesses**

With TRAVERSE, the adaptability tools come standard with the solution. While these tools are powerful enough for IT experts to create custom solutions, many of them are designed to allow desktop-level personalization by any trained employee.

TRAVERSE offers a unique, innovative framework that minimizes or eliminates the conflicts caused when service packs or updates are applied. This means that once you have invested in customizations, you will not need to reprogram those changes or purchase them again with each update and new version. True long-term investment in customization is now within your grasp.

TRAVERSE stands alone in its ability to provide a perfectly fitting business solution for your organization. If you believe that adaptability is the key to success, then TRAVERSE can help you to be successful like no other solution can.

### **Take complete control of your business management software**

As the sophistication of business management software grows, many companies find that their business processes do not always fit well with their software's functionality. To be most useful and cost-effective, software must be configurable; it must adapt to your business without expensive modifications.

TRAVERSE fits your business like a glove, regardless of the extent of needed adaptations. TRAVERSE allows you to meet those needs through any combination of its four layers of adaptability.



## Realize the power of adaptability at every workstation

Information is the lifeblood of every business. When each of your employees is empowered to collect, organize, share, and deliver information in the way that best suits their objectives, the result is increased productivity and efficiency throughout the organization.

TRVERSE allows each employee to personalize the interface and reporting tools, giving him or her mastery over their software experience and the way in which information is retrieved, presented, and published.

This capability is an intrinsic part of the design of TRVERSE, and includes advanced inquiry and reporting tools, task panes, functional preferences, and "favorites" menus.

Every employee, regardless of role, can find greater efficiency in his or her work using the power of these personalization features. Personalization gives employees the ability to adapt TRVERSE to their daily tasks, with

- configurable task panes that provide immediate access to associated relevant information
- advanced inquiry and personal views to help them find information quickly, present it in the most useful format, and save the view for easy recall
- the ability to personalize TRVERSE by adjusting the menu terms and organization, and by changing the basic form navigation
- functional preferences to maximize the efficiency of their workstation
- editable help notes which allow employees and departments to document special procedures within the help window topics
- "favorites" menus to minimize time spent looking for critical functions
- themes to personalize the colors and fonts, used to make TRVERSE as pleasing to the eye as it is effective in serving business needs



## Your business information does more with TRVERSE personalization

Personalization allows different employees or departments to manipulate information to serve their unique needs.

For example, the same sales history information can be adjusted to help warehouse employees manage stock levels or to help sales representatives identify customer buying patterns. Inventory data can be adjusted to inform warehouse employees about floor placement or to help purchasing agents monitor which products are selling well.

TRVERSE helps each employee and department manipulate information to best serve their unique needs.

## Use inquiry and reporting to tailor information for every need

TRVERSE features adaptable inquiries, which allow you to format interactive views of information by filtering out unnecessary data, sorting the remaining data according to your needs, and by rearranging, adding, and removing columns of Information as needed.

When you finish adjusting the format to your needs, you can browse the information, print it to a report, or graph selected data using TRVERSE's powerful graphing capabilities.

You can then save the view for later recall. These personalized views offer great efficiency in subsequent information retrieval, and can be shared with others in the organization.

TRVERSE uses the powerful, fully configurable SQL Server® Reporting Services reporting engine, and comes with a useful variety of pre-built reports that will meet the needs of most companies. SQL Reporting Services gives you the ability to customize these reports, if necessary.

## Personalize your workspace with TRVERSE

The screenshot displays the TRVERSE application window. On the left, a 'Favorites' menu lists various functions like 'AP Purchases Journal' and 'Accounts Payable'. The main window shows a transaction form with fields for 'Transaction ID', 'Batch Code', 'Location ID', and 'Sales Rep ID'. An 'Online Help' window is open in the foreground, displaying a 'Table of Contents' and a 'Credit Card Authorization' section. A callout box points to an 'Add Note' button in the help window.

Tabbed windows let you open functions on the screen your way, and allow you to open multiple instances of the same function.

The favorites menu gives you quick access to the functions you use most.

Use themes to personalize the colors and fonts of the interface.

Editable help notes give you a convenient place to store special procedures and reminders in your workspace.

# PERSONALIZATION

## Tailor information for specific tasks

The same sales history information can be adjusted to help warehouse employees manage stock levels...

AR Detail History Inquiry

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Server Filter: [Account Type] Equals Open Invoice

Item ID ↑

| Description        | Qty Ship | Units | Order Date | Invoice No   | Customer ID | Ext Price   | Trans Type   |
|--------------------|----------|-------|------------|--------------|-------------|-------------|--------------|
| Item ID: 100       |          |       |            |              |             |             |              |
| Electrical Package | 1.0000   | PKG   | 1/7/2007   | 081000000001 | Alt008      | 528.54      | 1            |
| Electrical Package | 1.0000   | PKG   | 1/7/2007   | 081000000003 | Alt008      | 528.54      | 1            |
| Electrical Package | 1.0000   | PKG   | 1/7/2007   | 081000000004 | Bet023      | 528.54      | 1            |
| Electrical Package | 1.0000   | PKG   | 1/7/2007   | 081000000005 | Cel017      | 528.54      | 1            |
| Electrical Package | 5.0000   | PKG   | 1/7/2007   | 081000000002 | Alt008      | 2,378.43    | 1            |
| Electrical Package | 2.0000   | PKG   | 3/23/2009  | 102          | Alt008      | 1,000.00    | 1            |
| Electrical Package | 2.0000   | PKG   | 3/23/2009  | Inv32309     | Bur056      | 1,000.00    | 1            |
| Item ID: 150       |          |       |            |              |             |             |              |
| Plumbing Package   | 1.0000   | PKG   | 1/7/2007   | 081000000002 | Alt008      | 1,463.76    | 1            |
| Item ID: 200100    |          |       |            |              |             |             |              |
| Furnace            | 1.0000   | EA    | 3/23/2009  | 99           | Alt008      | 449.95      | 1            |
| Item ID: 200200    |          |       |            |              |             |             |              |
| Water Heater       | 2.0000   | EA    | 2/20/2007  | 030100000001 | Bur056      | 0.00        | 1            |
|                    |          |       |            |              |             | 22,545.5000 | 9,732,795.82 |

...or to help sales representatives identify customer buying patterns.

AR Detail History Inquiry

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Server Filter: [Account Type] Equals Open Invoice

Customer ID ↑ Order Date ↑ Item ID ↑

| Description            | Qty Ship | Units | Invoice No | Ext Price   | Trans Type   |
|------------------------|----------|-------|------------|-------------|--------------|
| Customer ID: Atm053    |          |       |            |             |              |
| Order Date: 6/6/2005   |          |       |            |             |              |
| Item ID: PRO022        |          |       |            |             |              |
| TR/ISA Controller      | 2.0000   | Each  | 1565412    | 367.16      | 1            |
| Order Date: 7/5/2005   |          |       |            |             |              |
| Item ID: PRO022        |          |       |            |             |              |
| TR/ISA Controller      | 2.0000   | Each  | 254561     | 367.16      | 1            |
| Order Date: 10/6/2005  |          |       |            |             |              |
| Item ID: PRO022        |          |       |            |             |              |
| TR/ISA Controller      | 2.0000   | Each  | 2556784    | 367.16      | 1            |
| Order Date: 11/17/2005 |          |       |            |             |              |
| Item ID: PRO022        |          |       |            |             |              |
| TR/ISA Controller      | 4.0000   | Each  | 658901     | 734.32      | 1            |
|                        |          |       |            | 22,545.5000 | 9,732,795.82 |

Once configured, warehouse personnel and sales representatives can easily retrieve the data in this format each time they use the inquiry function.

## Improve collaboration across departments with task panes

You can further personalize TRAVERSE using 'task panes,' which are dockable dialog windows that give you a convenient way to view related data, drill down for more detailed data, connect to related functions, and perform simple tasks. Task panes provide ready access to information, and are a critical source of efficiency for any and every employee in your organization.

Task panes enable employees to easily access transactions, history, inventory, and other information relating directly to the tasks they perform.

For example, in the Accounts Receivable Transaction function, task panes can provide ready access to open orders, prior purchases, inventory stock levels, credit information, and so on. Task panes eliminate the need to have multiple functions open to retrieve needed information, saving employees time and valuable screen space. Task panes can be configured and saved for each workstation or employee, and are easily retrieved the next time that task is performed.

### Task panes provide instant efficiency gains

While entering a customer order in a transaction screen, the sales assistant uses a task pane to review inventory stock levels. The local warehouse is out of the item the client wants.

Without having to pick up a phone, write an e-mail, or even leave the sales screen, the sales assistant uses the task pane to find an alternate warehouse that has the item in stock.

Without delay to the sales assistant or the client, the order is completed, and the item is on its way.

The screenshot displays a software interface with a main window titled 'Customers' and a docked 'Task Pane' window. The main window shows a customer record for 'Altos Servers Company' with various fields for contact information, address, and status. The 'Task Pane' window is docked on the right and displays a table of 'Open Invoices' for customer 'Alt008'.

| Cust ID | Amount    |
|---------|-----------|
| Alt008  | 562.90    |
| Alt008  | 1,558.90  |
| Alt008  | 562.90    |
| Alt008  | 2,533.03  |
| Alt008  | 18,264.75 |
| Alt008  | 21,790.59 |
| Alt008  | 10,376.47 |

The task pane also includes a filter:  [Cust ID] = 'Alt008' And [A... Edit Filter]

## Seize control of your software without modifying code

In today's information-rich business world, the most efficient organizations are able to match collected data to the functional needs of their employees.

TRAVERSE accomplishes this by allowing you to customize your software by adding custom fields, creating user- or role-based variations of the user-interface, managing workflow, and more. The TRAVERSE Design Studio allows you to adapt TRAVERSE to fit the broader needs of your organization. TRAVERSE Design Studio allows you to

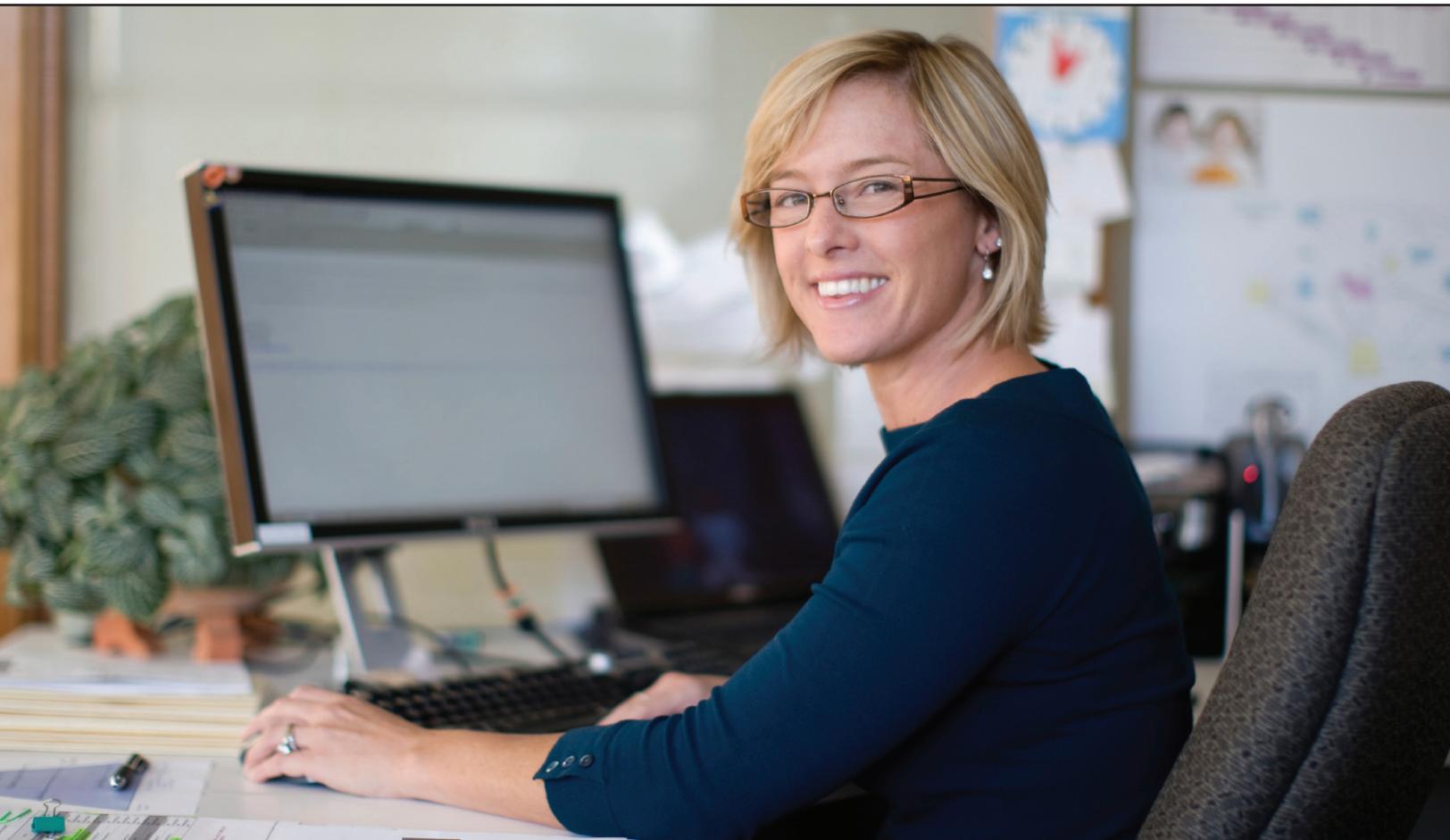
- change TRAVERSE screens by adding custom fields and adjusting screen layouts
- define digital dashboard components
- customize workflow (using the Enterprise Edition of TRAVERSE)

### Customize forms without modifying code

Moving fields in a form is as easy as dropping and dragging. You can hide fields, move fields around the form, and move fields to different tabs. In this way, each employee can have their interface tailored for the fastest possible data entry and retrieval.

### Create custom fields easily and quickly

Adding custom fields to the software requires only two steps using the Design Studio. First, you define the field by giving it a name, screen prompt, data type, field validations, etc. Then, you associate that field with a TRAVERSE entity, such as an inventory item, a customer, or a sales order. That field is added to the function used to maintain that object, and automatically becomes available for inclusion on any of the personalized reports or inquiries based on that object.



## Scripting – the power of programming without source code alteration

The TRAVERSE Design Studio enables you to use scripting language to add custom validations, computations, colors, and many other kinds of changes in software behavior.

While TRAVERSE uses the .NET variation of Python™ called Iron Python, it supports JavaScript and VBScript as well. Your IT department or software provider will have their choice of tools to get the job done.

These scripts are saved outside of the core programs, so no changes are made to the standard software. This also means that these scripts will remain intact even after installing service packs, upgrades, and most feature packs.

## Create role-assigned functions to suit your organization

Multiple variations of a given function can be saved and assigned to specific users or roles. This provides an easy mechanism to control which users have access to specific information. For instance, a data entry person can be restricted from seeing the cost information on a quote or order, but the sales manager working with the same data entry form will see that information.

### Add fields and change form layouts in a snap

Using design studio, you can easily add fields to maintenance and transaction functions, remove unnecessary fields, and move fields within or between tabs— all without writing code.

General Defaults Balance Payments Ship To

|                      |                       |              |                |
|----------------------|-----------------------|--------------|----------------|
| Name                 | Altos Servers Company | Status       | Active         |
| Attention            | Jon Dalmark           | Bill To ID   |                |
| Address 1            | 4301 Dean Lakes Blvd  | Currency ID  | USD            |
| Address 2            |                       | Phone        | (612)-805-6782 |
| City                 | Shakopee              | Fax          | (612)-805-6024 |
| Region               | MN                    | Country      | USA            |
| Postal Code          | 55379-_____           | Territory ID | Northern       |
| International Prefix | 011                   | Ship Zone    | 1              |
| Contact              | Wendy Severson        | E-mail       | info@osas.com  |
|                      |                       | Internet     | www.osas.com   |

General Defaults Balance Payments Ship To

|             |                       |                |                |
|-------------|-----------------------|----------------|----------------|
| Name        | Altos Servers Company | Status         | Active         |
| Attention   | Jon Dalmark           | Customer Since | 3/24/2009      |
| Address 1   | 4301 Dean Lakes Blvd  | Bill To ID     |                |
| Address 2   |                       | Currency ID    | USD            |
| City        | Shakopee              | Phone          | (612)-805-6782 |
| Region      | MN                    | Fax            | (612)-805-6024 |
| Postal Code | 55379-_____           | E-mail         | info@osas.com  |
| Ship Zone   | 1                     | Internet       | www.osas.com   |
| Contact     | Wendy Severson        | Customer Type  | Wholesale      |

In the example above, we used Design Studio to add two custom fields and move two existing fields in the standard Customers form in AR Setup and Maintenance. We have moved the Ship Zone field, removed the International Prefix field, used scripting to change the Active status color to green, and used the custom field capability to add Customer Since and Customer Type to the form.

## Take advantage of third-party tools without sacrificing security

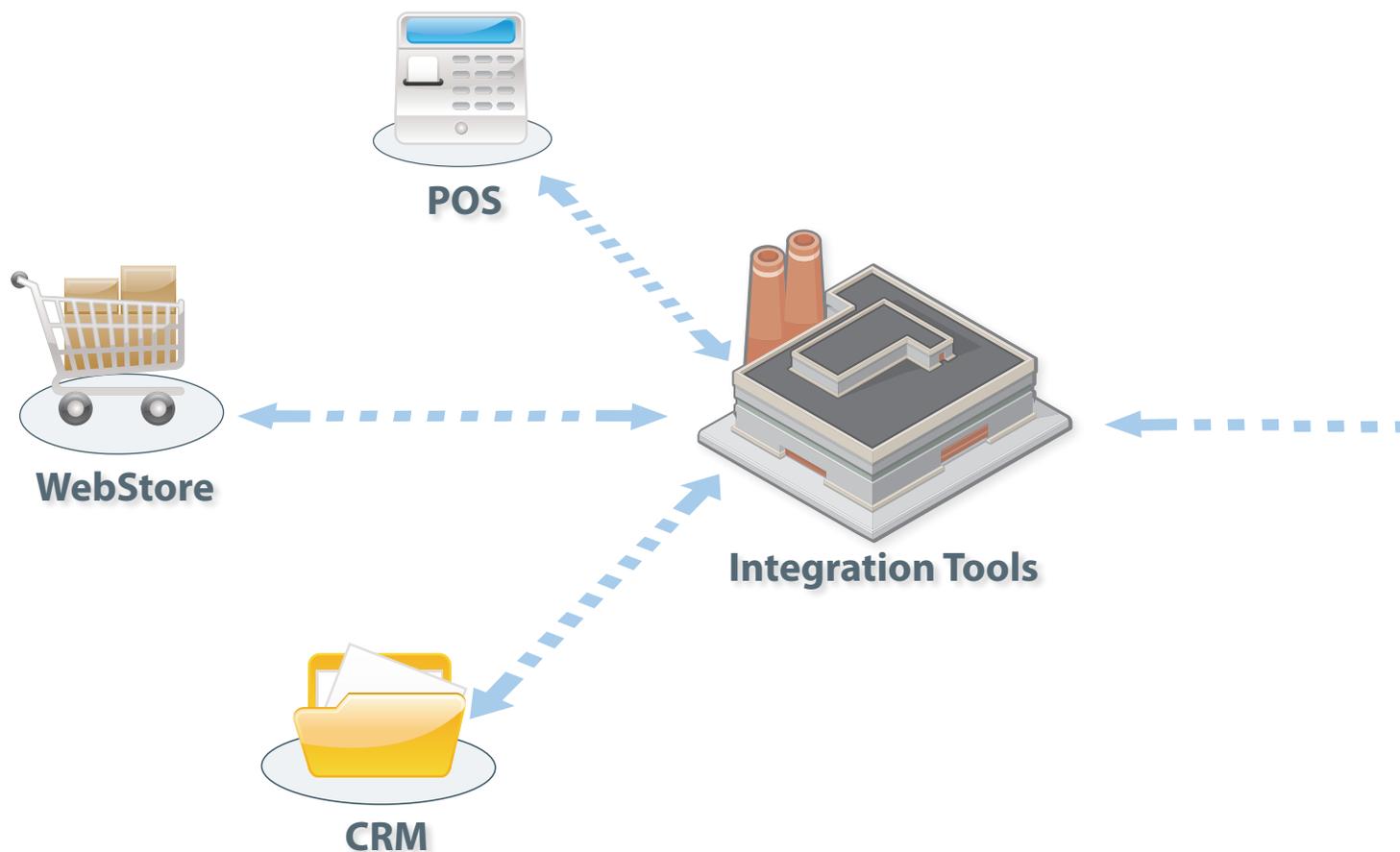
Businesses often rely on a variety of software, databases and hardware to meet their business needs. The biggest challenge is to make these components work together. How can you easily integrate your other applications with TRAVERSE?

The answer lies in the TRAVERSE integration tools, an element of the TRAVERSE Design Studio which is based upon technology called Service-Oriented Architecture (SOA). Applications written in languages that support this architecture can communicate without an intimate knowledge of each other's internal structures and databases. They do so via services that provide a communications framework by which information can be exchanged.

TRAVERSE provides the framework to make this integration possible. TRAVERSE includes a set of data mapping and scheduling tools that you can use to employ business data from almost any application or data source. This enables you to integrate your web store, trading partner, or other proprietary or third-party applications with TRAVERSE.

When the TRAVERSE integration tools import data from a third-party database, TRAVERSE passes the data through the business layer, ensuring the validity and integrity of the data. The criteria for your database integrity is upheld and met, regardless of the data source.

You can perform imports and exports individually, or you can use the TRAVERSE integration tools to schedule automatic imports or exports as often as necessary.



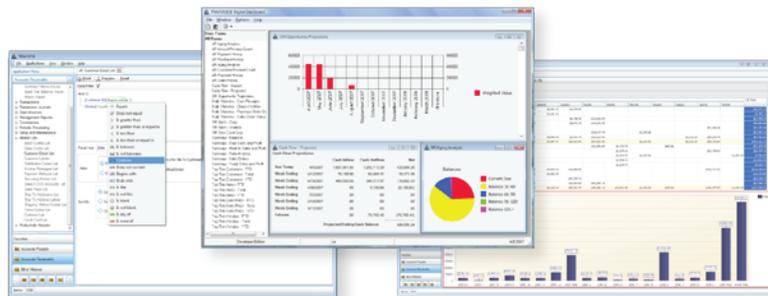
## Integrate TRAVERSE easily with third-party software

The TRAVERSE integration tools enable you to safely and securely integrate third-party software, including web stores, point-of-sale applications, and CRM databases.

Integration is as easy as:

- Identifying the data that you need to integrate from the third-party software or database
- Mapping the data fields using the TRAVERSE Integration Engine
- Performing the database imports and exports on command or scheduling them to manage server load or employee needs

# TRAVERSE®



## Build solutions without modifying source code

When it comes to business software, complex needs require a complete solution, and that often requires the modification of source code. While the benefits of investing in customized software solutions are well-known, there is a significant, expensive drawback: modifications are often disrupted or broken by software upgrades, security enhancements, and new versions. This means that modified source code must be updated—and many times, re-written—to accommodate these necessary milestones.

The personalization, design, and integration capabilities of TRAVERGE give you a wide variety of adaptive options to tailor the solution to your needs. If your needs require functionality beyond those layers of adaptability, TRAVERGE enables you to customize your solution through extensions or custom applications.

While it is not unheard of for software to be customizable, it is the way in which TRAVERGE can be customized that is unique.

Customizations you develop using the TRAVERGE framework do not require alteration of the source code. Rather, all customizations interact with the business layer without changing it. An extension or custom application built using the TRAVERGE framework automatically inherits the personalization, design changes, and integration capabilities of standard TRAVERGE applications. So how does this affect your business?

### Embrace progress without fear

While many major modification projects are costly, they also carry the hidden fee of needing to be updated—or completely reprogrammed—when necessary service packs or upgrades arrive.

Because TRAVERGE customizations are executed without modifying source code, those customizations can be carried forward in subsequent versions of TRAVERGE. You are free to build the business software solution that your organization has always needed, and will be able to protect that investment into the future.

### Easily find the experienced help you need with industry-respected standards

When you need IT or outside programming help to customize your solution, TRAVERGE's foundation of industry respected .NET and SQL Server technologies ensure that you will be able to find the talent you need to get the job done.

TRAVERGE is designed following object-oriented principles and is built on Microsoft's .NET Framework. The business processes can be deployed as software services in a Service-Oriented Architecture (SOA), providing services that can be used by other packages to exchange information with TRAVERGE. In return, TRAVERGE can communicate with other packages by way of their services as well.



## Stay agile with TRAVERSE

You know the challenges. The question is no longer “will there be change?” or “when will change come?” The question is “are you prepared to deal with change?”

TRAVERSE can help you remain agile and prosperous in the face of certain change.

Because adaptability is the key to long-term success for your businesses, TRAVERSE was designed from the ground-up to make sure your processes, employees, and organization can be as flexible and agile as possible. Rigid, inflexible businesses are a thing of the past, as are the traditional accounting/ERP solutions designed for that era.

- TRAVERSE offers unparalleled adaptability that allows you to precisely adjust the software to your business practices today, while also providing the flexibility to adapt to your changing business needs in the future.
- Your employees will be empowered with the tools and the information they need to enhance efficiency, anticipate problems, and capitalize upon opportunities.
- TRAVERSE integrates easily and safely with the other applications you use in your business.

TRAVERSE provides unprecedented control of your business management solution across every level of your organization. And because of its unique design, the customizations you make (and the investment put into making them) are protected in future versions of the software.

### **Meet today’s challenges with the next generation of business software**

Because the pace of change in business today is greater than ever before, businesses need a powerful, adaptable solution that provides the timely information needed to make informed business decisions. Furthermore, TRAVERSE will help agile organizations to prosper in this rapidly changing business environment.

Our commitment to you, our investment in product development, and our focus on providing the most adaptable business software available makes Open Systems your ideal business partner.

Let us show you how TRAVERSE, the next generation of business management software, can help your company to conquer the challenges of today’s business climate, and provide unparalleled scalability and flexibility to adapt to your business both today and into the future.





# **TRAVERSE**<sup>®</sup> | Executive Briefing



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Software Solutions**  
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