Executive Briefing: Strategy

The Next Generation of Business Management Software

TRAVERSE ®

Today's Challenges…

As the pace of change increases, both employees and managers are required to control every aspect of the organization. Employees and managers empowered with timely, accurate, and easily retrieved information can effectively increase the company's performance and ability to capitalize on new opportunities.

The organization's business solution must be flexible, easy to use, scalable, and adaptable to respond rapidly to the organization's changing needs, both internal and external.

Traditional accounting/ERP systems were designed for the challenges of the past. These software products cannot effectively respond to today's demands. They are monolithic, complex to configure, hard to use, costly to maintain, incompatible with other software, difficult to upgrade, and outdated.

Today's businesses need a powerful, next-generation solution that provides the timely information needed to make accurate decisions. TRAVERSE® is the next generation of business software that helps organizations meet their objectives.

TRAVERSE helps organizations respond to environmental changes, become more agile, and capitalize on opportunities during good and difficult times.

We hope that you find the following information useful, and we look forward to being a strategic partner in your future success.

Dr. Michael Bertini, CEO
Open Systems, Inc.

TRAVERSE Is the Next Generation of Business Software

TRAVERSE was designed to empower employees and organizations to adapt the software to meet their specific changing needs, while minimizing the need for Information Technology resources. TRAVERSE is flexible, adaptable, and leverages the rich information, processes, and competitive advantages that make your company unique.

TRAVERSE capitalizes on powerful Microsoft® technologies like .NET and SQL Server®. Using those technologies, TRAVERSE was redesigned to adopt a new approach to business software that

- empowers you by putting you in control of your daily activities
- is easily adaptable without the need for modifying source code
- accomplishes more with existing resources
- helps you interpret complex information for better decision making
- gives you insight to capitalize on new opportunities
- helps you become proactive, rather than reactive, to internal and external factors
- costs less to deploy and implement, adapt to your changing business needs, and maintain with future releases
- protects your investment because it is based on the TRAVERSE framework, which enables you to maintain customizations in future versions of the software without requiring you to redo them

TRAVERSE offers award-winning ease-of-use. And while employees can become effective quickly, TRAVERSE's feature set is robust and will continue to meet your needs as you grow.

Open Systems – Over 30 Years of Adaptable Solutions

TRAVERSE is developed by Open Systems, Inc., a company with more than 30 years of experience designing adaptable solutions for companies just like yours. Open Systems has always provided source code to encourage adaptation of its solutions through customization of its products. The philosophy of providing adaptable solutions lives on in the TRAVERSE framework.

The TRAVERSE framework provides the tools and customization capabilities needed to adapt the software to meet your specific needs—adaptations once possible only with code modification. This approach provides unprecedented software flexibility while protecting your investment because your customized source code is re-usable in future versions of the software.

TRAVERSE Helps You Streamline Your Business

Today's business environment changes rapidly as the pace of business increases. Companies are continuously pressured to improve customer service, attract new customers, improve business performance, and overcome new challenges.

Businesses must transform their organizations to remain effective, which means making the right changes at the right time. Making employees more productive and effective is crucial during times of transformation.

Business management software must support the way a business needs to operate, not the other way around. When the software conforms to an organization's processes, employees spend more time on productive tasks that help the business grow.

Traditional Solutions Slow the Pace of Business

While traditional accounting/ERP systems were designed to help companies manage their business, they hinder the completion of critical tasks. Specifically, traditional systems

- do not support transformation of the business
- cannot conform to the way employees need to work today

- force employees to perform cumbersome processes
- do not provide timely, accurate, and flexible information needed by employees, vendors, and customers in the format they each require
- impose large learning curves in which employees waste time trying to match business processes with what the software can or cannot provide

All of this translates into significant increases in IT spending and time wasted on managing unproductive processes. As a result, the organization is unable to capitalize on its resources and opportunities.

Adaptability is the Key to an Efficient Organization

Adaptability sets TRAVERSE apart from traditional accounting/ERP solutions. TRAVERSE is designed to help your employees focus on the needs of the business.

With its four layers of adaptability, TRAVERSE allows you to change the behavior of the software to suit your processes, both today and in the future. TRAVERSE was redeveloped using the very best of today's technology—Microsoft .NET and SQL Server. Its adaptable framework provides you with reusable customization, which means TRAVERSE can meet your specific needs without compromising future upgrades.

Take Control Using TRAVERSE's Four Levels of Adaptability

The first level of TRAVERSE adaptability is **Personalization**, which allows employees to adjust the interface and reporting tools, giving them mastery over how information is entered, retrieved, presented, and published.

This capability empowers each employee to adapt TRAVERSE to their daily tasks, with

- 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
- functional preferences to maximize the efficiency of their workstation
- editable help which allows them to note special procedures within the help window
- "favorites" menus to minimize time spent looking for critical functions
- configurable task panes to provide immediate access to associated relevant information

The second level of adaptability is **Design**. The TRAVERSE Design Studio allows you to adapt TRAVERSE to fit the broader needs of your organization.
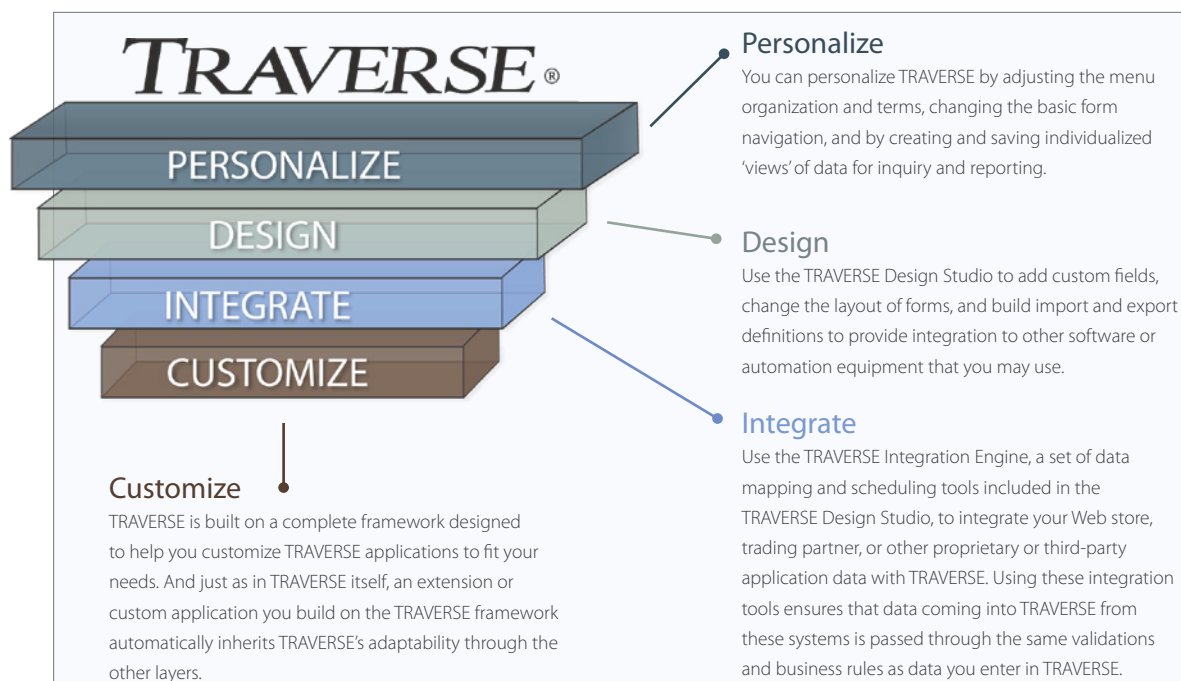
TRAVERSE Design Studio allows you to

- change TRAVERSE screens by adding custom fields and adjusting screen layouts
- modify the behavior of the software without changing the source code using scripting
- define digital dashboard components
- customize workflow (using the Enterprise Edition of TRAVERSE)

The third level of TRAVERSE adaptability is **Integration**. The TRAVERSE Integration Engine is a component of the TRAVERSE Design Studio, which allows you to share data between TRAVERSE and other databases and applications you use in your business. Integrating to third party applications and web sites and exchanging data is now made easier, while protecting the integrity of your data.

The fourth level of TRAVERSE adaptability is **Customization**. If your organization needs a more extensive solution, the object-oriented framework of TRAVERSE allows you to program custom solutions without modifying the TRAVERSE source code.

Best of all, you will no longer be forced to choose between taking advantage of new versions and reinvesting in customization. Once you have tailored TRAVERSE to your specific needs using the four layers of adaptability, your changes are protected and reused during future service packs and upgrades to new versions of TRAVERSE.

TRAVERSE®

PERSONALIZE
DESIGN
INTEGRATE
CUSTOMIZE

Personalize
You can personalize TRAVERSE by adjusting the menu organization and terms, changing the basic form navigation, and by creating and saving individualized 'views' of data for inquiry and reporting.

Design
Use the TRAVERSE Design Studio to add custom fields, change the layout of forms, and build import and export definitions to provide integration to other software or automation equipment that you may use.

Integrate
Use the TRAVERSE Integration Engine, a set of data mapping and scheduling tools included in the TRAVERSE Design Studio, to integrate your Web store, trading partner, or other proprietary or third-party application data with TRAVERSE. Using these integration tools ensures that data coming into TRAVERSE from these systems is passed through the same validations and business rules as data you enter in TRAVERSE.

Customize
TRAVERSE is built on a complete framework designed to help you customize TRAVERSE applications to fit your needs. And just as in TRAVERSE itself, an extension or custom application you build on the TRAVERSE framework automatically inherits TRAVERSE's adaptability through the other layers.

Turn Data into Useful Information

Data is not information. Information is the key to gaining the insight necessary to manage change and make the right decisions, and is critical to building and growing a business. Turning data into actionable information is a daily challenge for most businesses.

Today, businesses constantly collect all kinds of data such as sales, inventory, purchasing, manufacturing, service, and so on. This large amount of complex data is collected and used in the existing accounting/ERP system, supported by spreadsheets and disparate databases. These spreadsheets and disparate systems were not designed to provide a framework that shares information effectively. Its sheer volume can intimidate those who try to make sense of it.

Traditional Systems Are Information Traps

Traditional accounting/ERP systems fail to provide timely, meaningful, and integrated information. The data is held hostage in complex, proprietary systems that often require third-party applications or expensive modifications to produce useful information, such as changes to simple reports or inquiry screens.

Further, traditional accounting/ERP systems do not adapt easily to the increasing needs of employees for information. This forces employees to enter important business data into disparate databases or spreadsheets. Too often, employees rely on memory simply because there is no place to store the data.

When ERP data must be combined with data from these disparate systems, the task of retrieving information becomes even more difficult. Traditional accounting/ERP reporting tools often do not work with other applications.

Users of traditional accounting/ERP systems are forced to rely on information technology specialists to perform even simple queries. This reliance on information technology increases cost of ownership, hinders access to timely information, and consumes valuable time and resources.

Retrieve the Information You Need Quickly and Easily with Adaptable Inquiries and Reporting

TRAVERSE features adaptable inquiries, which allow you to format views of information by filtering out unnecessary data and by rearranging, adding, and removing columns of information as needed. You can print these views and save them for later use. You can also set default views and share views with others in the organization.
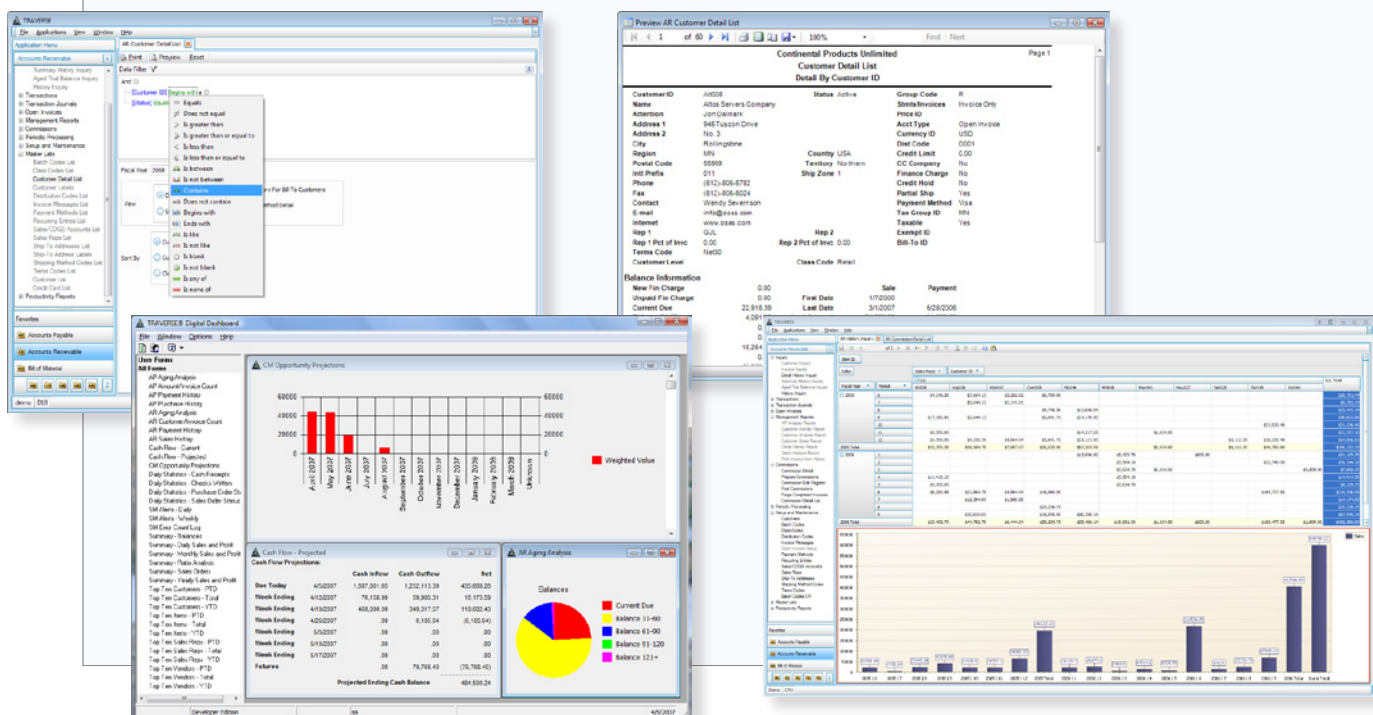
TRAVERSE uses the powerful, fully configurable SQL Reporting Services reporting engine, and comes with a useful variety of pre-built reports that will meet the needs of most companies. SQL Reporting Services gives you the ability to customize these reports, if necessary. TRAVERSE includes a number of powerful advanced reporting applications, including;

- Advanced Information Analyst, a multidimensional reporting tool that helps you understand increasingly complex problems. It uses the latest online analytical processing (OLAP) technology to produce reports and graphs that afford a new level of insight.

- Advanced Financial Analyst, a state-of-the-art reporting tool that allows you to perform 'what if' analyses, create charts and graphs, and distribute financial information in native Excel, HTML or text formats.
- Synoptix for TRAVERSE from CompuSoft Development, a complete solution for enterprise report writing and drill-down analysis. It delivers end-to-end reporting capabilities from financial and operational reporting to advanced budgeting capabilities.

Furthermore, because TRAVERSE tightly integrates with Microsoft Office applications, you can use Microsoft Excel to create limitless combinations of reports and usable data sets.

Dashboards, inquiries, reports, spreadsheet exports, automated alerts… however you need information delivered to you, TRAVERSE has a solution.

Improve Collaboration Using One Information Framework

To be most effective, departments must be able to share information freely. Unfortunately, businesses often rely on multiple systems that perform specific functions and cannot share information readily with other systems.
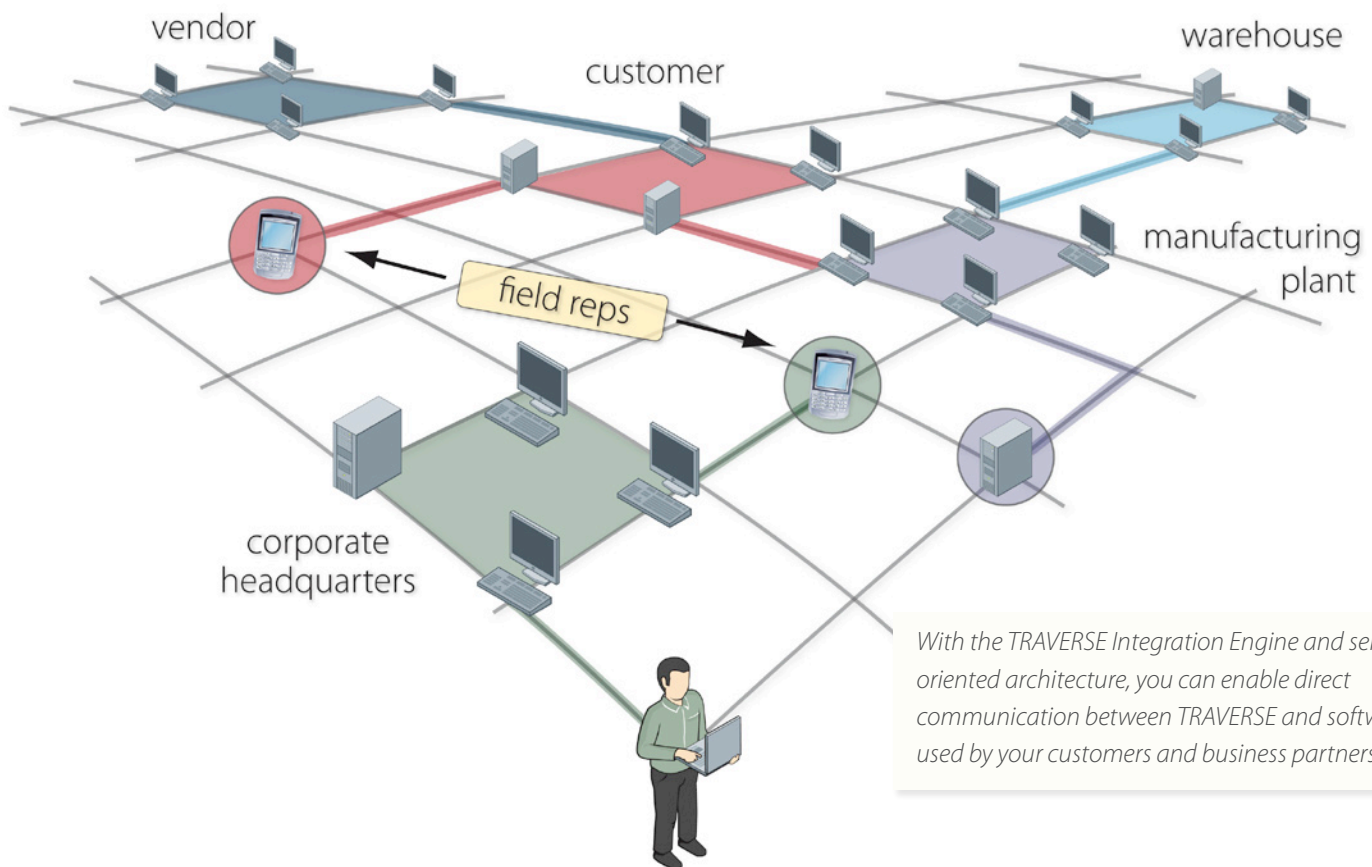
This has created crippling problems for organizations wanting to respond quickly to change. Information silos occur, and employees are often denied access to key information. Whole departments are cut off from the resources they need, and receive only a small fraction of the data that should be available to them.

To succeed today and in the future, organizations need a comprehensive business solution that can integrate easily with other software products. TRAVERSE empowers employees to gain access to and share the information they need to be most effective.

The Hazards of Using Disparate Systems

Traditional accounting/ERP systems are often based on proprietary technologies and databases that cannot easily integrate with other software products. These restrictions can have a profoundly negative impact in several ways:

- Incommunicative systems force employees to commit information to memory, or to enter information into separate, disconnected systems like spreadsheet programs.
- Disparate systems do not work well together. Databases are not easily relatable between systems. Needed information is not accessible to the right users.
- Companies have outgrown the abilities of their rigid, outdated accounting/ERP systems. These systems are not robust enough to handle the changing demands of business today. Employees have to rely on external programs and platforms outside of the accounting/ERP system to perform their jobs.
- The lack of information means decisions cannot be made accurately, effectively, or in a timely manner.

With the TRAVERSE Integration Engine and service-oriented architecture, you can enable direct communication between TRAVERSE and software used by your customers and business partners.

Build a Stronger Organization by Sharing Needed Information

TRAVERSE can help your employees collaborate more effectively with all stakeholders: customers, vendors, executives, banks, and so on. You can connect all your departments to one integrated source of data, which provides accurate information to stakeholders as needed. Your employees get things done easily with real-time, relevant, and integrated business knowledge.

TRAVERSE offers complete solutions for businesses in many industries. The comprehensive, award-winning feature set meets the needs of the entire organization, making TRAVERSE an ideal solution to unify your departments under one integrated system.

The TRAVERSE eBusiness applications allow you to stay in close contact with off-site stakeholders such as vendors, customers, and sales representatives.

Maximize Efficiency by Safely Integrating Your Applications

If the unique needs of your business demand additional software solutions, the TRAVERSE Integration Engine in the TRAVERSE Design Studio allows you to exchange data on demand or at scheduled intervals. You can define data exports from TRAVERSE to your other software applications, as well as imports of data into TRAVERSE.

Best of all, TRAVERSE assures the validity and integrity of your financial data by subjecting the data you import via the Integration Engine to the same business rules and validations as data entered directly into TRAVERSE.

Tear Down Walls Between Applications Using Service-Oriented Architecture

If the need for more advanced integration arises, the TRAVERSE framework provides the solution. TRAVERSE 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 TRAVERSE.

Because TRAVERSE can communicate with other packages by way of their services, the types of applications that you can integrate with TRAVERSE in this manner are limitless. You can incorporate wireless applications, handheld device applications, web-based applications, and other business applications both internal and external to your organization.

Deliver the Right Information to the Right People at the Right Time in the Right Format

Critical business information must be accurate, timely, and placed into the hands of the right people within your organization.

To help businesses compete in today's rapidly changing environment, TRAVERSE delivers the right information in a timely fashion to the people within the organization who need it most. TRAVERSE will help you identify potential problems before they develop, and will help you mobilize the appropriate resources to solve problems and seize opportunities as they arise.

Traditional Business Solutions Slow the Flow of Information

Traditional accounting/ERP systems create many obstacles that prevent information from landing on the desks of decision makers when it is needed. Traditional accounting/ERP systems

- merely produce lists of data, requiring employees to comb through spreadsheets and reports to identify which information is important and which is not
- deliver information late (if at all), causing employees to waste time putting out fires
- make it difficult for management to gauge the state of the company
- prohibit access to information because the data is stored in separate, incompatible software applications
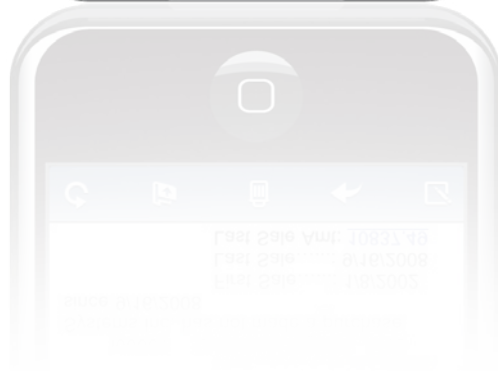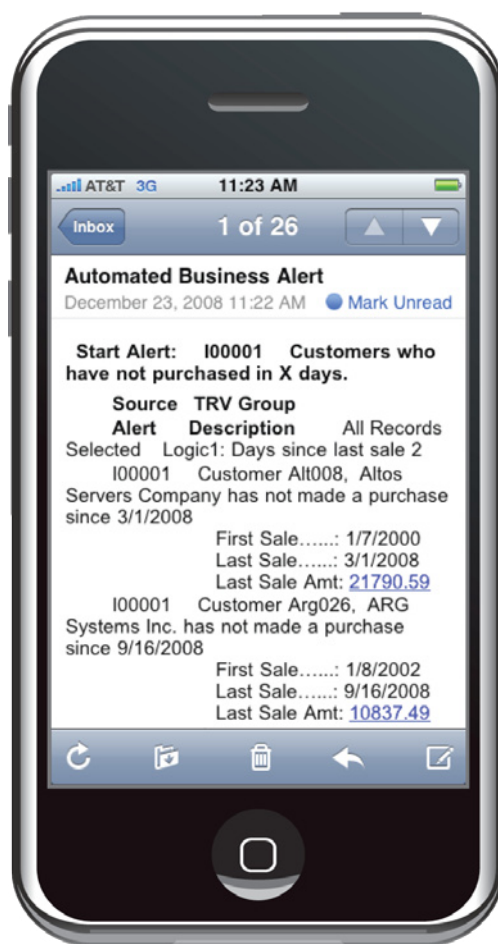
Act on Timely, Reliable Information Delivered Automatically to You

TRAVERSE bridges this information gap by providing actionable information alerts, business metrics, and scheduled reports. You and your employees are freed from having to spot opportunities and problems, allowing you to spend time developing strategies, crafting solutions, and building your business.

TRAVERSE can be configured to e-mail informational alerts to the right people inside—and outside—of your organization. Alerts are timely and sent directly to the people best able to make a decision and take action. Your employees will save time and energy by seizing opportunities and solving problems quickly.

TRAVERSE provides Digital Dashboards you can use to monitor key performance indicators from your desktop. From sales results to cash balances to financial ratios, Digital Dashboard delivers the information you need to keep your finger on the pulse of your business.

You can schedule any of the TRAVERSE reports to run at specified times and have them delivered to the recipients of your choosing. Information is up-to-date and delivered in time to make optimal use of it.

A Solution for Your Future: TRAVERSE is Built for Change

Today, rapid change is a fact of life. Businesses are challenged by the need to become more agile, to meet new requirements, to capitalize on new opportunities, and to control costs. TRAVERSE, the next generation of business management software, provides the flexibility, adaptability, and scalability organizations need to adapt and grow in turbulent times.

Traditional Systems Have Not Kept Up

Businesses are dynamic. Their needs have changed. Because of their rigidity and lack of scalability, traditional accounting/ERP systems that once served the needs of the business are now outdated, outgrown, or out of step with the needs of today.

Traditional accounting/ERP solutions often require costly modifications to adjust to new business realities. However, modifying a traditional solution can be a risky proposition. Waiting to customize a solution may cause missed opportunities that using an optimized solution can provide. On the other hand, paying for modifications now may mean additional costs in the future when those modifications are no longer compatible with service packs and future versions of the traditional software.

TRAVERSE Grows and Changes With You

Open Systems was founded on principles of adaptability, and has always made source code available for organizations that required customization to adapt the software to their specific needs. TRAVERSE is a fully scalable solution that allows you to make the changes you require without the need for code customization.

As described previously, TRAVERSE provides four layers of adaptability: Personalization, Design, Integration, and Customization. While you can use these capabilities to tailor the software to your specific needs today, you can also use them to adapt TRAVERSE to fit your future business requirements, if they change.

Customize Your Solution Without Modifications

If your current or future needs require a customized solution, you can build it within the TRAVERSE framework. The TRAVERSE framework is created using well respected, widely-used Microsoft technologies—.NET and SQL Server. This makes it easier to find the skilled technical resources you need to create your own customized solution.

With traditional software, creating a custom solution requires the modification of source code. The TRAVERSE framework, on the other hand, allows you to build objects to change the behavior of the software without modifying TRAVERSE source code. Therefore, you can enjoy the benefits of deploying a custom-crafted solution while minimizing or eliminating the need to rework this code when applying service packs and future versions of TRAVERSE.

TRAVERSE Delivers a Solid Return on Investment

TRAVERSE provides solutions to many of the problems businesses face today. As discussed previously, TRAVERSE can help

- streamline business processes
- improve access to critical business information and help put it to use
- enhance employee collaboration through information sharing
- foster a proactive business culture through timely business alerts
- assure that evolving business needs are met through adaptability and scalability

TRAVERSE delivers a solid return on investment through increased productivity, lowered costs, and greater efficiency in your business. Moreover, TRAVERSE delivers returns in non-traditional ways as well.

By making your employees more productive, they are free to do the business of your business. TRAVERSE allows your employees to spend time on value-added activities like increasing sales, improving customer service, or finding new ways to streamline operations.

Employees feel good about doing work that helps the company, rather than managing processes. TRAVERSE helps free your employees to focus on what they do best.

Is Your Business Solution an Expense, or an Investment?

Because traditional accounting/ERP solutions are monolithic, difficult to configure, and costly to maintain, businesses have historically viewed them as an expensive necessity, not an investment from which to expect organizational gains.

Furthermore, the expense does not end with mere maintenance and support. Businesses are forced to pay for expensive modifications that merely keep the solution working, and pay again to have those same modifications configured to work with service packs and upgrades. The traditional accounting/ERP solution becomes an organizational money pit that does not address the increasing needs over time.

TRAVERSE is an Investment in Your Business

Choosing TRAVERSE as your accounting/ERP solution will give you returns and benefits for years to come. Because it is feature-rich and adaptable, TRAVERSE represents an investment in your business, your mission-critical processes, and the fulfillment of your company goals.

Adaptability and scalability are built into TRAVERSE, giving you the flexibility to scale your solution as your company grows, adjust functionality as your needs change, and stay current with service packs and new versions without overhauling customizations.

The TRAVERSE Framework: Built with Trusted Technology

The next generation of business software, TRAVERSE, is configurable, adaptable, and cost-controlling by design. TRAVERSE has been redesigned using Microsoft technologies like .NET and SQL Server.

The TRAVERSE framework leverages these cutting-edge technologies to deliver a user experience and flexible software for a new era of business. This era requires software which is easily adapted to your unique business needs. You can be assured that the TRAVERSE framework and these popular and powerful technologies will serve as a solid information base for your business well into the future.

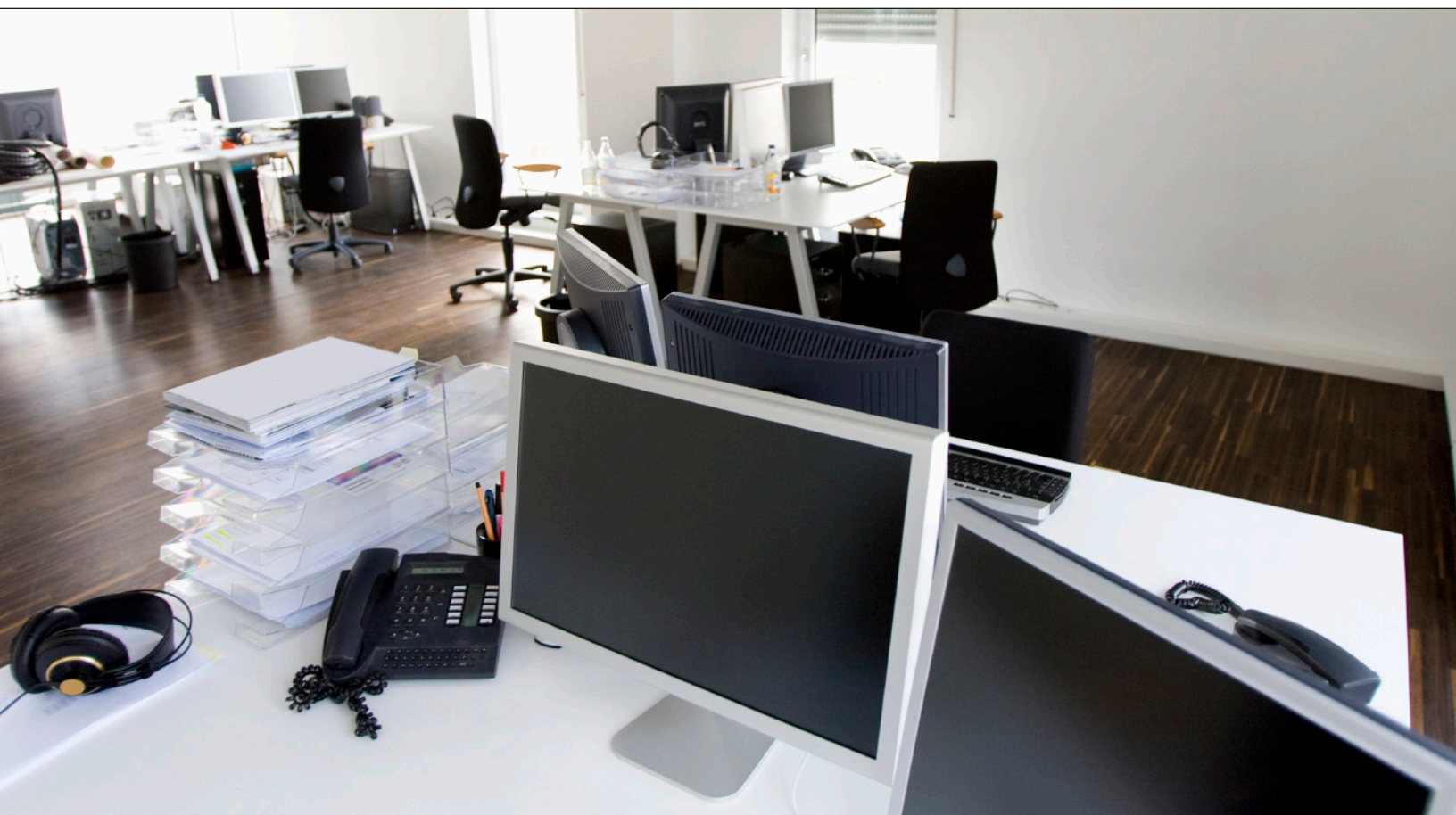## Some Solutions Are Not What They Seem

Many accounting/ERP packages that claim to be built with .NET technologies are simply the same software with a .NET wrapper. Nothing about those products has really changed. TRAVERSE, on the other hand, has been redesigned from the ground up with these technologies at the core of all aspects of the software. TRAVERSE's innovative design puts you in control of your software, and fully delivers on the promise of these technologies.

TRAVERSE's Framework Provides Unsurpassed Adaptability

The TRAVERSE applications are built on a complete framework designed to simplify the extension of functionality to meet the specific needs of your company. The framework provides the four layers of adaptability that make TRAVERSE the most flexible accounting/ERP solution available.

In most cases, you can easily adapt TRAVERSE to fit your business without any need for code modification. With the power to personalize reports, adjust inquiries, and make use of the robust business intelligence applications available for use with TRAVERSE, you can achieve mastery over the information within your system.

For companies wanting to build in-house solutions to meet unique needs, the TRAVERSE Software Developer's Kit provides the tools to create extensions or custom applications. An extension or custom application built using the TRAVERSE framework automatically inherits the personalization, design changes, and integration capabilities of standard TRAVERSE applications.
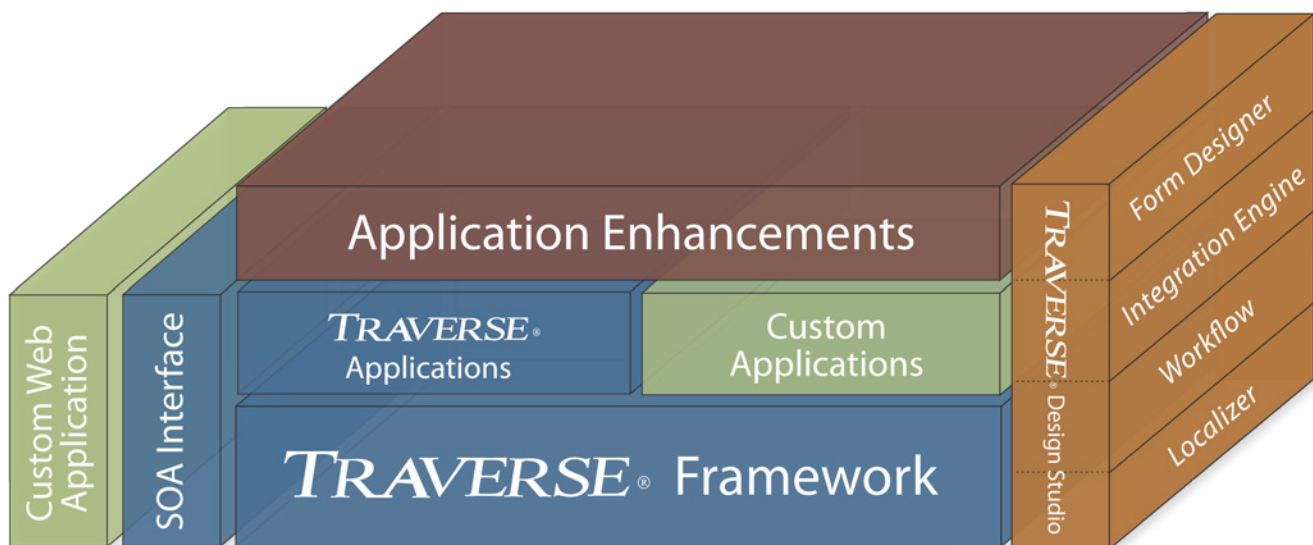
Make Obsolescence Obsolete

Adaptations you make to the software, either through the Personalization options, the Design Studio, or the TRAVERSE framework, are preserved when you apply service packs and future releases of TRAVERSE. There is no need to re-create customizations to work with later versions of TRAVERSE solutions.

Leverage over 30 Years of Experience with Open Systems, Inc.

Open Systems' core competency is designing business software for small, growing, and mid-sized organizations. TRAVERSE is the culmination of over 30 years of providing usable, adaptable business solutions for companies like yours.

The TRAVERSE applications are built on a complete framework designed to simplify the extension of functionality to meet the specific needs of your company.

Open Systems—the Difference is in the Product, Price, and Relationship

Open Systems is interested in and dedicated to your success. Our commitment to you is part of our company DNA. Our mission is to provide adaptable business solutions that empower our clients to effectively meet their objectives.

Throughout its more than thirty years in business, Open Systems has collaborated with reselling partners, consultants, and developers in order to deliver adaptable solutions to thousands of small and mid-market clients. This channel approach leverages the incredible expertise that our reselling partners can bring to their clients by adding value to our solutions.

Together, our reselling partners, dedicated support staff, and enthusiastic group of employees stand ready to help you achieve your goals by bringing you the next generation of business software.

Put Our Experience to Work for You

Open Systems was founded in 1976 on the premise of delivering powerful accounting software solutions to small and mid-market customers. Dr. Michael Bertini, the CEO of Open Systems, purchased the company in 1990. Dr. Bertini's commitment to product development is complete and ongoing.

You can rest assured that Open Systems will continue to develop solutions built upon the latest technologies that deliver the functionality and flexibility you need to grow your business well into the future.

Adaptable Solutions for Businesses Like Yours

Open Systems has created specific solutions for a wide variety of industries, including accounting, distribution, manufacturing, not-for-profit, service, retail, and construction. Our solutions have been tailored to fit the needs of countless vertical industries and market niches.

Our solutions are adaptable because of our commitment to provide flexible, scalable, and configurable solutions that conform to your business practices. Since the beginning, our commitment to adaptability has taken the form of source code freely available with all of Open Systems' products. Our objective today with TRAVERSE is to provide you with unprecedented adaptability that eliminates the need to change the source code to create the solution you need to fit your unique business.
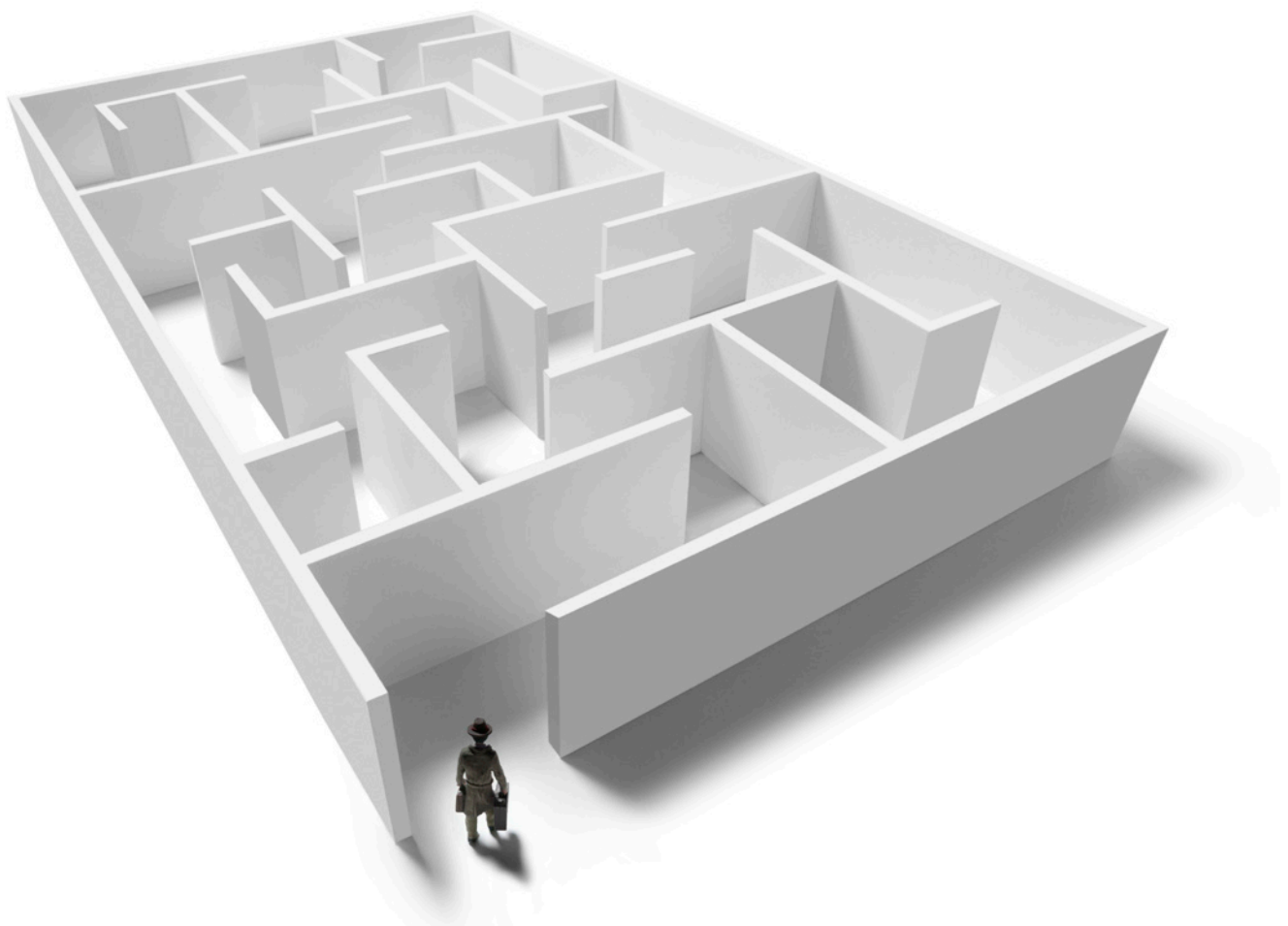
Meet Today's Challenges With the Next Generation of Business Software

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 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.

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