2015 East Coast Primarius Users Group Meeting Agenda

Monday, September 21, 2015
2:00 p.m. to 5:00 p.m. Primarius Essentials – Matt, Pete and Nelson
5:00 p.m. Registration Desk Open
6:00 p.m. to 7:30 p.m. Reception in Safe Harbor Wolverine
Dinner on your own

Tuesday, September 22, 2015

General Session Room
8:00 a.m. Continental Breakfast
8:15 a.m. to 8:30 a.m. Welcome and Agenda Review
8:30 a.m. to 10:00 a.m. Who’s on First - Matt
10:00 a.m. to 10:30 a.m. Break
10:30 a.m. to 12:00 p.m. Managing Internal Programs - Patty
12:00 p.m. to 1:00 p.m. Deli Buffet Lunch
1:00 p.m. to 2:30 p.m. Order Processing and Bar Code Guided Picking - Nelson
2:30 p.m. to 3:00 p.m. Break
3:00 p.m. to 4:30 p.m. Primarius 2 –Rich

Breakout Room
8:30 a.m. to 10:00 a.m. Round Table with Pete/Lynn (Balancing Act)
10:30 a.m. to 12:00 p.m. Food Recovery and Sorting - Nelson
1:00 p.m. to 2:30 p.m. Accounts Payable, ACH and Import/Export – Pete/Lynn
3:00 p.m. to 4:30 p.m. Round Table with Patty (Feeding America Reporting)

Wednesday, September 23, 2015

General Session Room
8:00 a.m. Continental Breakfast
8:15 a.m. to 8:30 a.m. Welcome and Agenda Review
8:30 a.m. to 10:00 a.m. Tool Time - Rich
10:00 a.m. to 10:30 a.m. Break
10:30 a.m. to 12:00 p.m. Pricing Soup to Nuts – Matt/Patty
12:00 p.m. to 1:00 p.m. Deli Buffet Lunch
1:00 p.m. to 2:30 p.m. Food Box Processing - Pete
2:30 p.m. to 3:00 p.m. Break
3:00 p.m. to 4:30 p.m. PO’s, Receipts, Mass Receipts - Nelson

Breakout Room
8:30 a.m. to 10:00 a.m. Donor Vantage Reporting and Direct Mail - Matt
10:30 a.m. to 12:00 p.m. Allocations Module - Pete
1:00 p.m. to 2:30 p.m. Anything Goes - Round Table with Rich
3:00 p.m. to 4:30 p.m. N/A
2015 East Coast Primarius User’s Group Workshop Descriptions

Primarius Essentials – Matt, Pete and Nelson

This will be a basic Primarius workshop covering the essentials of Donors, Receipting, Inventory, Order Processing and Agency Maintenance. The session is intended for users who are new to Primarius and would like a review of its basic operations. There will be question and answer opportunities throughout the workshop.

1) Who’s on First - Matt

In this session we will review the fields in Agency Maintenance and Order processing to determine what other operations are affected by those fields. We will also look at how those fields affect reporting.

2) Managing Internal Programs - Patty

Learn how to use the Primarius Web Window and Primarius to manage internal food bank programs such as Retail Pickup, Food Drives, Agency Pickup, Mobile Pantries, Pickup Points or Warehouses. Various options will be discussed and attendee interaction will be encouraged.

3) Order Processing and Bar Code Guided Picking – Nelson

A complete discussion of the order process from the entry of an order in the PWW to the confirming of the order with all of the steps in between will be discussed in detail. There will also be a discussion of the guided order selection process in the bar code software.

4) Primarius 2 – Rich and Doug

We will be presenting the current status of the rewrite of Primarius along with a timeline for completion. A demonstration of Primarius 2 will also be given.

5) Food Recovery and Sorting – Nelson

This will be a session on the processing of sorting food drive, salvage and bulk product through the Transform screen in Primarius. Attendees will be encouraged to share ideas on how their food bank processes these kinds of products and their challenges.

6) Accounts Payable, ACH and Import/Export – Pete/Lynn

We will review the processes in Accounts Payable for creating an ACH file to send to your Bank for the payment of the Food Banks Vendors. We will cover the process to set up files to be imported to or exported from Accounts Payable for use with third part software. Other Accounts Payable Transactions will also be covered.

7) Tool Time – Rich

Use the Excel 2010 Power Query and Power Pivot tools, we will demonstrate how to connect to Primarius data and quickly create pivot tables and charts for analyzing your data. Once a pivot table and chart is created we will show you how to slice the data for to get precise information about your operation.
8) Pricing Soup to Nuts – Matt/Patty

This session will describe the way Primarius handles costs and values of product being received by the food bank. It will also cover how Primarius assigns service fees (shared maintenance) and the pricing of products when an agency order is created. How processes, like transform, affect costs and pricing will also be reviewed.

9) Feeding America Reporting (QPR and Blue Receipts) – Round Table with Patty

What are the fields in Primarius that control the QPR and Blue Receipts and how do I make sure that they are set correctly to provide accurate data to Feeding America? These are the questions that we will answer in this class.

10) Donor Vantage Reporting and Direct Mail - Matt

Accessing Donor Vantage data and sharing data with your direct mail vendor will be the focus of this session.

11) Food Box Processing - Pete

A step-by-step discussion of how to setup and run a CSFP, Emergency Food box, Senior Food Box or Back Pack program using Primarius food boxes.

12) PO’s Receipts and Mass Receipts - Nelson

In this session we will review the differences and purpose of each type of Receipt, how to properly set them up and process each type, and how to use features such as Food Drives and Retail Pickup.

13) Allocations Module - Pete

This session is an in-depth look at allocating product to Agencies and Warehouses. Users can allocate product using manually calculated percentages, tables based on statistics or percentages based on statistics. The food bank can create orders from the allocations or agencies can then approve allocations through the web. Primarius will then process orders and warehouse transfers.

14) GL Round Table with Pete/Lynn

Review of Processes and Reports to use to balance between GL and Primarius will be discussed and any GL questions that you may have.