



# Operations Plus

**Operations Plus Users Group Agenda  
April 29<sup>th</sup> – May 1st, 2009  
Ritz-Carlton Denver**

**April 29th Meeting Time Line:**

6:00 pm – 9:00 pm      Breakout Sessions

**“How To” Technical Questions** (Reporting, ODBC, Network, Remote Access) – [Wayne Hall](#)

**File Downloads and Imports** (Clearing Firms, DST, DAZL, other) - [Lee Adkins](#)

**Advanced Technical Questions** – [Gary Blair](#)

**WinOPS Options and Best Practices**– [Rod Lueck](#)

**Reg SP** – Mike Kopp

**Strategic Partner Workshops** – LaserApp, ePerimeter, The Compliance Department

Please contact Techmate to RSVP 303-985-9956

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## April 30th Meeting Time Line:

8:00 am – 8:30 am	Registration, Coffee and Continental Breakfast
8:30 am - 10:00 am	Introduction of C5 Solutions for Broker/Dealers – What it means to you
10:00 am - 10:15 am	Morning Break
10:15 am - 11:55 am	DST Enhancements (FanMail, Vision, Order Placement/Settlement)
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:15 pm	New Feature Review and Application
2:15 pm - 3:00 pm	Wish List (Tailoring WinOPS to serve you better)
3:00 pm – 3:15 pm	Afternoon break
3:15 pm – 4:30 pm	Wish List (Continued)
6:00 pm – 9:00 pm	Breakout Sessions

**“How To” Technical Questions** (Reporting, ODBC, Network, Remote Access) – [Wayne Hall](#)

**File Downloads and Imports** (Clearing Firms, DST, DAZL, other) - [Lee Adkins](#)

**Advanced Technical Questions** – [Gary Blair](#)

**DST Interface “Best Practices” in WinOPS** – Charles Welsh and [Rod Lueck](#)

**Reg SP** – Mike Kopp

**Strategic Partner Workshops** – LaserApp,, ePerimeter, The Compliance Department

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## May 1st Meeting Time Line:

8:00 am - 8:30 am	Coffee and Continental Breakfast
8:30 am - 10:00 am	Online Product Cleanup and Maintenance
10:00 am - 10:15 am	Morning Break
10:15 am - 11:00 pm	Remote Access (Dashboard)
11:00 am - 12:00 pm	Wish List
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:00 pm	Enhanced Data Access (ODBC)
2:00 pm - 4:15 pm	Working on Your Business (Build your 2009 action plan)
4:15	Users Group Meeting Adjourned