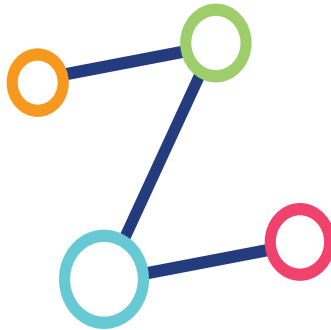


# CONFERENCE PROGRAM



**RTA CONNECT**  
ANNUAL USERS' CONFERENCE

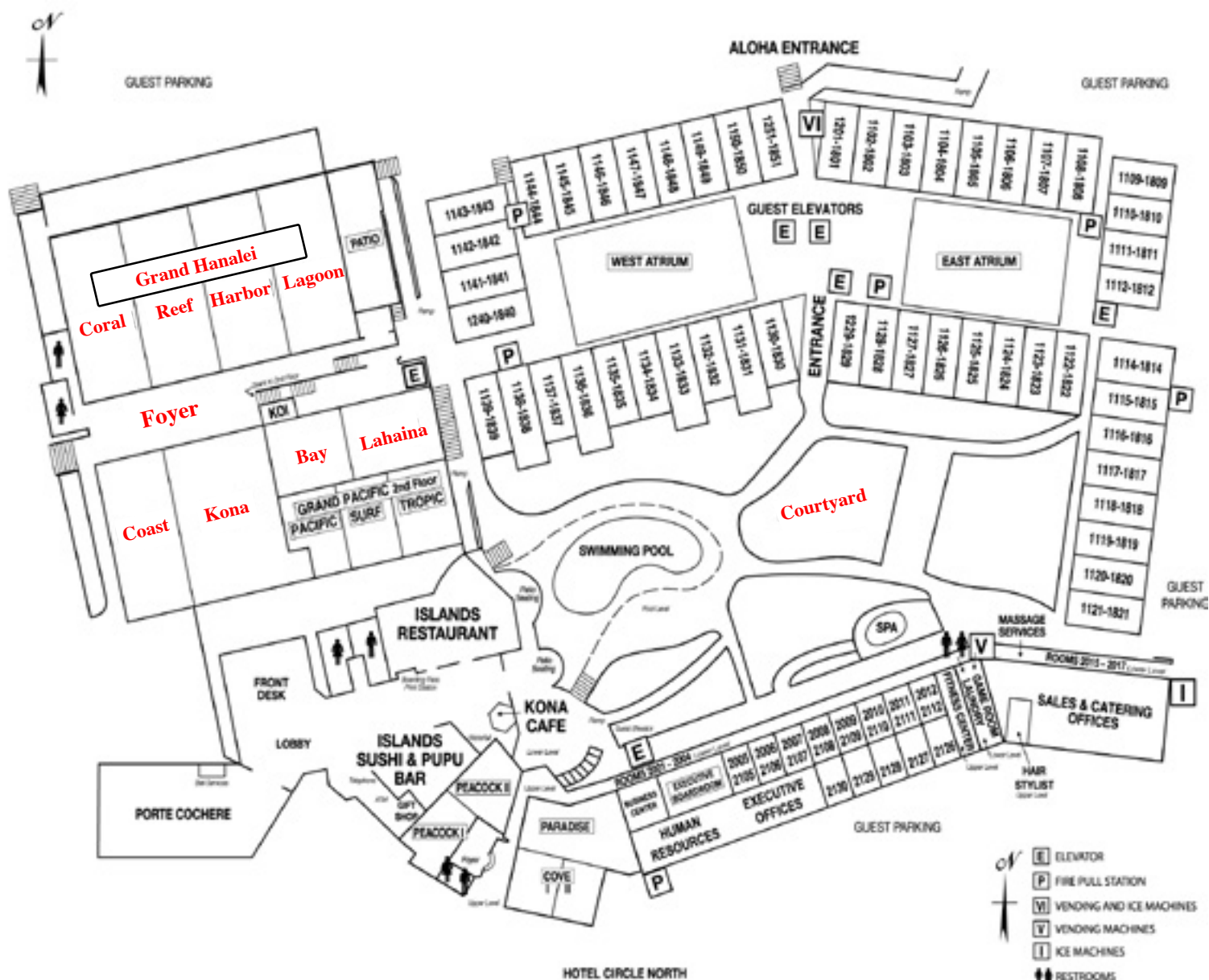
**MARCH 19TH - 23RD, 2018 | SAN DIEGO, CA | CROWNE PLAZA HOTEL, MISSION VALLEY**

## **TABLE OF CONTENTS:**

- **CONFERENCE MAP**
- **EVENING EVENTS & SPONSORS**
- **SPEAKERS**
- **CONFERENCE SCHEDULE**
- **SESSION DESCRIPTIONS**

# YOU ARE HERE...

## CROWNE PLAZA HOTEL - CONFERENCE CENTER



# CEO FIRESIDE CHAT & NETWORKING

Get to know RTA's CEO, Josh Turley, as he discusses the past, present, and future of fleet management software and RTA's part in your organization's success.

**6-7pm, Kona Ballroom**

Then, enjoy drinks and appetizers outdoors with your friends and colleagues. Thanks to GPS Insight for sponsoring this social event.

**7-8pm, Courtyard**

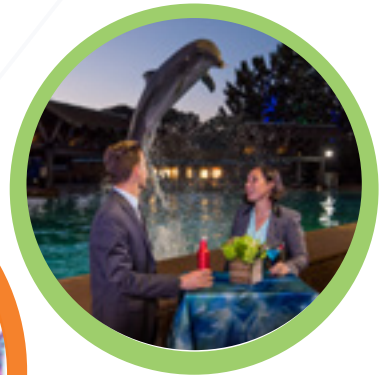
**TUESDAY  
6-8 PM**

Entertainment  
provided by



# A FUN EVENING AT SEAWORLD

Join friends and peers for a unique social and dining event at SeaWorld. Take a ride on the Manta roller-coaster, surround yourself with gliding rays in a one-of-a-kind grotto where you can touch and feed these incredible animals, interact with bottlenose dolphins up close, and enjoy a night of fun with RTA!



**WEDNESDAY  
6-10 PM**

**Note: Buses will be departing from the hotel between 5:30-6pm.**

# SPONSORS & EXHIBITORS

Thank you to our valued partners who helped to make this week's event a success. Be sure to stop by their exhibitor tables in the conference room foyer.



# KEYNOTE SPEAKERS

## JOSH TURLEY



CEO, RTA FLEET MANAGEMENT SOFTWARE

Josh has been with RTA since 2004, and became CEO in 2015 to continue his family's legacy of making an impact in the lives we touch. Josh works alongside his team to set the vision for the future of RTA to ensure we are supporting fleet personnel to grow beyond the status quo. Josh's passion with RTA is to provide our clients with the tools they need to save them time and money in their operations. Be sure to attend our Tuesday night CEO Fireside Chat to ask Josh YOUR questions, and join us Wednesday morning for his Keynote Address to kick off the conference and get us excited about the week's events!

[CEO Fireside Chat // Tuesday, 6PM // Kona](#)

[Keynote Speaker // Wednesday, 8:30AM // Grand Hanalei](#)

## DOUG PERKES



CTO, RTA FLEET MANAGEMENT SOFTWARE

Doug joined RTA in 2017 as our Chief Technology Officer. He comes to us with over 20 years experience in software development and architecture, including over 10 years at Microsoft. He is setting the RTA roadmap for the future of our technology to meet our client's needs. Doug's passion for technology will enhance RTA's product offerings to ensure we are providing you with the best solution. Join us Thursday morning to hear Doug share his technology plans for RTA.

[Keynote Speaker // Thursday, 8:30AM // Grand Hanalei](#)

## REDMOND RAMOS



MOTIVATIONAL SPEAKER, VETERAN

Redmond Ramos was a Navy Corpsman as a combat medic with The Marines. He deployed to Afghanistan, where he stepped on an IED and lost his left leg. Redmond came home and decided to begin a life of motivating others. He has competed in track and swim internationally for Team USA Invictus Games, Endeavor Games, and Warrior Games, as well as competing on The Amazing Race and Triumph Games on CBS. Time Magazine has written about him, and he was the Keynote Speaker for The Naval Ball in 2017. You're sure to be inspired after listening to his Keynote Address to us on achieving "Success Through Struggle."

[Keynote Speaker // Thursday, 9:15AM // Grand Hanalei](#)

# SPEAKERS

## HAROLD LEITNER

GPS INSIGHT  
VP, Business Development



Harold Leitner is the Vice President of Business Development for GPS Insight. His responsibilities for GPS Insight include channel management, strategic partnerships, technology integration, and vendor relations. With over 20 years of enterprise technology experience, Harold brings a depth of knowledge across a wide range of industries.

[Level 3 ROI // Wednesday, 2:20PM // Coast](#)

[Come See the GPS Insight Team At Our Exhibitor Tables and the Welcome Reception on Tuesday evening](#)

## TOM BIELICKI

TIRE-TRACK, LLC  
President



After graduating from the University of Maryland with a BA in Economics, and holding several Sales roles in the Healthcare industry, he left the Corporate world and joined his family recycling business which was started by his father. In 2001 he ventured out on his own and founded Tire-Track LLC. Tire-Track ID UNIT, is a permanent all-rubber barcode label specifically designed for tires. The ID UNIT replaces "hot branding" with a barcode label that can survive on the sidewall of a tire, from cradle-to-grave, and works seamlessly with the RTA interface (since 2003) and enables Fleet Managers to "scan, track and manage tires, just like any other barcoded part."

[Tires // Thursday, 3:30PM // Coast](#)

[Come See Tom At Our Exhibitor Tables](#)

## WARREN WILLIAMS

FUEL FORCE  
Director, National Business Development



Warren Williams is the Director, National EV Business Development for Multiforce Systems Corp., a leading fuel management systems company. In that role, Warren leads the effort to assist fleets in managing electric vehicle charging as part of the total fuel management strategy. He joined Multiforce this year with the charge to launch FuelForce® EV, an integrated fuel management platform for EV Charging. Prior to joining Multiforce, Warren was a management consultant providing business analysis and strategy as well as marketing assistance to Cyber Switching, a Silicon Valley-based leader in the power management industry. Warren has an extensive background in technical marketing, product development, and business development. Warren has an MBA from San Francisco State University and is committed to giving back by volunteering his time in his local community.

[Electronic Vehicle Charging // Thursday, 1:20PM // Coast](#)

[Come See Warren At Our Exhibitor Tables](#)

## JETT KUNTZ

NAPA INTEGRATED BUSINESS SOLUTIONS  
Vice President



Jett is currently Vice President of Integrated Business Solutions (IBS) for Genuine Parts Company/NAPA Auto Parts - Atlanta, GA (NYSE: GPC). He manages a nationwide team that provides unique vendor managed inventory and productivity services for large government and private fleets in the US and Canada. He currently works with over 6,000 company-owned and independent NAPA stores and over 400 On-Site vendor-managed NAPA IBS sites in the US and Canada.

[RTA & NAPA // Thursday, 10:20AM // Bay](#)

[Come See the NAPA IBS Team At Our Exhibitor Tables](#)



MARCH 19TH - 23RD, 2018 | SAN DIEGO, CA | CROWNE PLAZA HOTEL, MISSION VALLEY





# SPEAKERS

## JAMEY PROCK

ZONAR SYSTEMS  
Enterprise Sales Director



As Enterprise Sales Director, Jamey has over 8 years of fleet management and telematics technology experience at Zonar. He has extensive expertise in obtaining and retaining customers for Zonar, and working with Vocational (Construction, Energy, Government, Oil & Gas, etc.), Transportation (Transit/Pupil), and Over-The-Road (OTR) Trucking Fleets. Prior to Zonar, Jamey spent 12 years in Government related work for the U.S. Navy & Defense Intelligence Agency.

[Session Speaker // Thursday, 10:20AM // Coast](#)

[Come See Jamey At Our Exhibitor Tables](#)

## FRED KROIN

GOAL PARTNERS, LLC  
CEO & Consultant



Fred brings over 30 years of profit and loss experience in various areas of Management. He is a proven leader who has led management teams through start-up, growth management and turnaround challenges yielding substantially improved bottom-line results.

[Sins of Management // Wednesday, 10:00AM // Lahaina](#)

[Time Management// Wednesday, 11:00AM // Lahaina](#)

## RICK KAUTH

AZ DEPT OF CORRECTIONS  
Maintenance Operations Manager



Rick's career in the fleet maintenance field began in 1977 as a Construction Equipment Repairman in the U.S. Army. He jumped out of a perfectly good airplane with a toolbox under his reserve parachute. He continued in vehicle maintenance with the Arizona Department of Corrections, where he has been since 1989. He now oversees 13 repair shops, 30 staff and is responsible for a fleet of just over 2,400 vehicles and equipment. Their annual fuel and repair budget averages around \$6 Million per year. ADC started with RTA in 1995 and it was Rick's shop that was tasked with the start-up of automating their fleet. They haven't looked back!

[Client Success: Lean Fleet // Wednesday, 1:20PM // Coast](#)



# PRE-CONFERENCE SCHEDULE

## Monday, March 19

6:30 a.m. **Registration** (*Registration will also be open Sunday 4:00-6:30 p.m.*)  
6:30 - 8:30 a.m. | Foyer

6:45 a.m. **Breakfast**  
6:45 - 8:15 a.m. | Kona

8:30 a.m. **Advanced Work Orders**  
8:30 - 12:00 p.m. | Harbor

**Reports Analysis 1**  
8:30 - 12:00 p.m. | Lagoon

**System Tips for RTA Managers**  
8:30 - 12:00 p.m. | Coast

**Data Access**  
8:30 - 12:00 p.m. | Bay

**Basic Training (Two Day Course)**  
8:30 - 5:00 p.m. | Coral (Group A) and Reef (Group B)

**Advanced Training (Two Day Course)**  
8:30 - 5:00 p.m. | Lahaina

12:00 p.m. **Lunch**  
12:00 - 1:30 p.m. | Courtyard

1:30 p.m. **Advanced Parts**  
1:30 - 5:00 p.m. | Bay

**Reports Analysis 2**  
1:30 - 5:00 p.m. | Harbor

**Daily/Monthly Processes**  
1:30 - 5:00 p.m. | Coast

**360° Warranties: Vehicles, Parts, and Claims**  
1:30 - 5:00 p.m. | Lagoon

# PRE-CONFERENCE SCHEDULE

## Tuesday, March 20

6:45 a.m.

### **Breakfast**

6:45 - 8:15 a.m. | Kona

8:30 a.m.

### **Advanced Vehicle and PMs**

8:30 - 12:00 p.m. | Coast

### **Reports Analysis 3**

8:30 - 12:00 p.m. | Lagoon

### **Max Utilization of RTA**

8:30 - 12:00 p.m. | Bay

### **Crystal Reports 1**

8:30 - 12:00 p.m. | Harbor

### **Basic Training (Two Day Course)**

8:30 - 5:00 p.m. | Coral (Group A) and Reef (Group B)

### **Advanced Training (Two Day Course)**

8:30 - 5:00 p.m. | Lahaina

12:00 p.m.

### **Lunch**

12:00 - 1:30 p.m. | Courtyard

1:30 p.m.

### **New Features**

1:30 - 5:00 p.m. | Lagoon

### **Reports Analysis 4**

1:30 - 5:00 p.m. | Coast

### **Paperless Inspections**

1:30 - 5:00 p.m. | Bay

### **Crystal Reports 2**

1:30 - 5:00 p.m. | Harbor

3:00 p.m.

### **Registration**

3:00 - 7:00 p.m. | Foyer

# CONFERENCE SCHEDULE

## Tuesday, March 20

6:00 p.m. **CEO Fireside Chat with Josh Turley**  
6:00 - 7:00 p.m. | Kona

7:00 p.m. **Evening Reception sponsored by GPS Insight**  
7:00 - 8:00 p.m. | Courtyard

## Wednesday, March 21

6:30 a.m. **Registration**  
6:30 a.m. - 8:30 a.m. | Foyer

6:45 a.m. **Breakfast**  
6:45 - 8:15 a.m. | Kona

8:30 a.m. **Keynote: Josh Turley, CEO (RTA) - Conference Kickoff**  
8:30 - 9:40 a.m. | Grand Hanalei

10:00 a.m. **Technician Productivity**  
10:00 - 10:40 a.m. | Coast | Track: Shop Supervisor

**The Sins of Management**  
10:00 - 10:40 a.m. | Lahaina | Track: Fleet Manager

**OEM Warranties**  
10:00 - 10:40 a.m. | Lagoon | Track: Administrator

**Purchasing Reports**  
10:00 - 10:40 a.m. | Grand Hanalei | Track: Parts Clerk/Purchasing

**Round Table: The Ideal Shop Setup**  
10:00 - 10:40 a.m. | Kona | Track: Connect

11:00 a.m. **Work Order Shortcuts/Timesavers**  
11:00a - 12:00 p.m. | Grand Hanalei | Track: Shop Supervisor

**Time Management**  
11:00a - 12:00 p.m. | Lahaina | Track: Fleet Manager

**Motor Pool Overview**  
11:00a - 12:00 p.m. | Bay | Track: Administrator

**Parts Reports**  
11:00a - 12:00 p.m. | Coast | Track: Parts Clerk/Purchasing

# CONFERENCE SCHEDULE

(Wednesday, March 21 - continued)

## Vehicle Cost Reports

11:00a - 12:00 p.m. | Lagoon | Track: Connect

12:00 p.m.

## Lunch

12:00 - 1:20 p.m. | Courtyard

12:30 p.m.

## Lightning Topic: Barcoding

12:30 - 12:45 p.m. | Foyer

12:50 p.m.

## Lightning Topic: Hosted Demo

12:50 - 1:05 p.m. | Foyer

1:20 p.m.

## Drivers Reports

1:20 - 2:00 p.m. | Lahaina | Track: Shop Supervisor

## Client Success Story: Lean Fleet

1:20 - 2:00 p.m. | Coast | Track: Fleet Manager

## EOP Procedures

1:20 - 2:00 p.m. | Grand Hanalei | Track: Administrator

## Fuel Tracking

1:20 - 2:00 p.m. | Lagoon | Track: Parts Clerk/Purchasing

## Round Table: New Users & Old Hats

1:20 - 2:00 p.m. | Kona | Track: Connect

2:20 p.m.

## ROI w/ Fleet Technology by GPS Insight

2:20 - 3:00 p.m. | Coast | Track: Shop Supervisor

## Vehicle Replacement

2:20 - 3:00 p.m. | Grand Hanalei | Track: Fleet Manager

## Dashboard Emails/Alerts

2:20 - 3:00 p.m. | Lahaina | Track: Administrator

## EFI: Automated Fuel Entry

2:20 - 3:00 p.m. | Lagoon | Track: Parts Clerk/Purchasing

## Round Table: Employee Retention

2:20 - 3:00 p.m. | Kona | Track: Connect

# CONFERENCE SCHEDULE

(Wednesday, March 21 - continued)

3:00 p.m.

## **Break**

3:00 - 3:30 p.m. | Conference Foyer

3:10 p.m.

## **Lightning Topic: Best Practices**

3:10 - 3:25 p.m. | Foyer

3:30 p.m.

## **Work Order Reports**

3:30 - 4:30 p.m. | Grand Hanalei | Track: Shop Supervisor

## **Vehicle Cost Reports**

3:30 - 4:30 p.m. | Coast | Track: Fleet Manager

## **Work Order Shortcuts & Timesavers**

3:30 - 4:30 p.m. | Lahaina | Track: Administrator

## **Parts & Purchase Order Shortcuts**

3:30 - 4:30 p.m. | Lagoon | Track: Parts Clerk/Purchasing

## **Round Table: Vehicle Replacement**

3:30 - 4:30 p.m. | Kona | Track: Connect

6:00 p.m.

## **A Fun Evening with RTA at SeaWorld**

6:00 - 10:00 p.m. | SeaWorld

Buses leaving front of hotel between 5:30 - 6:00 p.m. **Don't forget your ticket!**

## Thursday, March 22

6:45 a.m.

## **Breakfast**

6:45 - 8:15 a.m. | Kona

8:30 a.m.

## **Keynote: Doug Perkes, CTO (RTA)**

8:30 - 9:10 a.m. | Grand Hanalei

9:15 a.m.

## **Keynote: Redmond Ramos, "Success Through Struggle"**

9:15 - 10:00 a.m. | Grand Hanalei

# CONFERENCE SCHEDULE

(Thursday, March 22 - continued)

10:20 a.m.

## **Service Bulletins & Recalls**

10:20 - 11:00 a.m. | Lahaina | Track: Shop Supervisor

## **Zonar: GPS and ELD**

10:20 - 11:00 a.m. | Coast | Track: Fleet Manager

## **Intro to Crystal Reports**

10:20 - 11:00 a.m. | Lagoon | Track: Administrator

## **RTA & NAPA IBS: Reduce Fleet Downtime & Control Costs**

10:20 - 11:00 a.m. | Bay | Track: Parts Clerk/Purchasing

## **Power: Lookup Lists**

10:20 - 11:00 a.m. | Grand Hanalei | Track: Connect

11:20 a.m.

## **PM Reports**

11:20a - 12:00 p.m. | Grand Hanalei | Track: Shop Supervisor

## **RTA Hosting Services**

11:20a - 12:00 p.m. | Coast | Track: Fleet Manager

## **Export/Import Basics**

11:20a - 12:00 p.m. | Lagoon | Track: Administrator

## **Parts Warranties**

11:20a - 12:00 p.m. | Lahaina | Track: Parts Clerk/Purchasing

## **Round Table: Benefits of Outsourcing**

11:20a - 12:00 p.m. | Kona | Track: Connect

12:00 p.m.

## **Lunch**

12:00 - 1:20 p.m. | Courtyard

12:30 p.m.

## **Lightning Topic: Image Viewer**

12:30 - 12:45 p.m. | Foyer

12:50 p.m.

## **Lightning Topic: Multi-Threading**

12:50 - 1:05 p.m. | Foyer

# CONFERENCE SCHEDULE

(Thursday, March 22 - continued)

1:20 p.m.

## **Paperless Shop Management**

1:20 - 2:00 p.m. | Grand Hanalei | Track: Shop Supervisor

## **Electronic Vehicle Charging by Fuel Force**

1:20 - 2:00 p.m. | Coast | Track: Fleet Manager

## **Power: Lookup Lists**

1:20 - 2:00 p.m. | Lagoon | Track: Administrator

## **Warranty Claims**

1:20 - 2:00 p.m. | Lahaina | Track: Parts Clerk/Purchasing

## **Round Table: SQL & Hosting Q&A**

1:20 - 2:00 p.m. | Kona | Track: Connect

2:20 p.m.

## **Paperless Shop Mechanic**

2:20 - 3:00 p.m. | Grand Hanalei | Track: Shop Supervisor

## **SQL Features Overview**

2:20 - 3:00 p.m. | Lahaina | Track: Fleet Manager

## **Integrations**

2:20 - 3:00 p.m. | Lagoon | Track: Administrator

## **Round Table: Parts/Purchasing**

2:20 - 3:00 p.m. | Coast | Track: Connect

## **Round Table: Open Forum**

2:20 - 3:00 p.m. | Kona | Track: Connect

3:00 p.m.

## **Break**

3:00 - 3:30 p.m. | Conference Foyer

3:10 p.m.

## **Lightning Topic: Training Vignettes**

3:10 - 3:25 p.m. | Foyer



# CONFERENCE SCHEDULE

(Thursday, March 22 - continued)

3:30 p.m.

**Shop Scheduler**

3:30 - 4:30 p.m. | Lahaina | Track: Shop Supervisor

**Work Order Reports**

3:30 - 4:30 p.m. | Grand Hanalei | Track: Fleet Manager

**Parts & Purchase Order Shortcuts**

3:30 - 4:30 p.m. | Lagoon | Track: Administrator

**Tires & Tire-Track**

3:30 - 4:30 p.m. | Coast | Track: Parts Clerk/Purchasing

**Round Table: Creative Budget Solutions**

3:30 - 4:30 p.m. | Kona | Track: Connect

# CONFERENCE SCHEDULE

## Friday, March 23

6:45 a.m.

### **Breakfast**

6:45 – 8:15 a.m. | Kona

8:30 a.m.

### **RTA Shipt Live!**

8:30 – 9:30 a.m. | Grand Hanalei

9:50 a.m.

### **Paperless Driver Inspections**

9:50 - 10:30 a.m. | Lahaina | Track: Shop Supervisor

### **Management Book Club: Recommended Reading**

9:50 - 10:30 a.m. | Coast | Track: Fleet Manager

### **User Maintenance & Alerts**

9:50 - 10:30 a.m. | Lagoon | Track: Administrator

### **Barcoding**

9:50 - 10:30 a.m. | Grand Hanalei | Track: Parts Clerk/Purchasing

### **Round Table: Paperless Shop Implementation**

9:50 - 10:30 a.m. | Kona | Track: Connect

10:50 a.m.

### **Paperless Mechanic Inspections**

10:50 - 11:30 a.m. | Lahaina | Track: Shop Supervisor

### **Export/Import Basics**

10:50 - 11:30 a.m. | Lagoon | Track: Fleet Manager

### **Protect & Correct Odometers**

10:50 - 11:30 a.m. | Coast | Track: Administrator

### **Purchase Order Approvals**

10:50 - 11:30 a.m. | Bay | Track: Parts Clerk/Purchasing

### **Round Table: Barcoding Hands-On**

10:50 - 11:30 a.m. | Grand Hanalei | Track: Connect

11:30 a.m.

### **Lunch & Closing Remarks**

11:30a - 1:00 p.m. | Courtyard

# SESSION DESCRIPTIONS: PRE-CONFERENCE

## Basic Training (2-Day Class)

This class covers the main features in the software and is an effective way of getting quickly trained and productive in the software. Whether you have attended a previous training or implemented a new system, this class provides the framework for setting up an RTA database and understanding all of the day-to-day functions in the software. You'll learn how to receive parts, post fuel, check PMs due, and create work orders. Plenty of hands-on workshops provide practice on each topic covered.

## 360° Warranties: Vehicles/Parts/Claims

Join the hundreds of fleets recouping thousands of dollars by utilizing RTA's Warranty Tracking programs. Part warranties are easy to setup and track all failures and life expectancies, and vehicle warranties are just as easy to setup. You'll receive immediate notification of parts or repairs still within warranty. The Warranty Claims program organizes them all, making it easy to submit claims, track pending and aging, and apply all those credits you receive.

## Advanced Vehicle and PMs

The Vehicle module has many capabilities that are sometimes overlooked, or forgotten. We'll cover tracking vehicle warranties, depreciation, capitalization, and the vehicle replacement schedules for planning and budgeting. We will also cover the Vehicle Status program, how to fully utilize class codes to group vehicles and the unlimited global – defined fields. Enhance your PM program by seeing the numerous advanced PM options.

## Crystal Reports 1

Crystal Reports is the popular reporting tool for relational databases such as SQL Server or Oracle. It is available for others using the optional XDBC driver. The basics of Crystal are covered, including linking data tables, table relationships, and connectivity. Learn how to create and run a procedure, select fields, and design a report layout. Hands-on workshops allow you to practice creating your own customized reports with the exact data you want to see.

## Advanced Training (2-Day Class)

Are you ready to take your RTA system to the next level? Learn shortcuts, tips and tricks, and advanced entry methods to optimize data tracking and productivity in this fast-paced, 2-day class. A few of the many topics include advanced PMs, warranties, parts reordering, time-saving work order options, and new enhancements recently released. Don't stop with the basics, begin utilizing the advanced features that originally brought you to the RTA software! Previous RTA system experience recommended.

## Advanced Parts

This class is a must for those involved in the Parts and Purchasing Departments who know the basics yet want to learn how to utilize the advanced features. Tracking warranties, cores, and other tips are provided to maximize use of the parts module. Save time in the data entry process with faster work order posting methods and utilizing parts kits. Discuss additional features such as the parts catalog, FIFO inventory valuation, and the centralized parts inventory.

## Advanced Work Orders

If you know the basics of entering a work order, you're ready to take advantage of the many advanced features. We'll demonstrate methods to save time in data entry and make reporting more accurate. See how to quickly create numerous work orders, perform advanced posting methods, and links to the PO module to eliminate double-entry. Try them all out yourself in hands-on workshops.

## Crystal Reports 2

This class utilizes your knowledge of the essentials of Crystal Reports to explore the advanced functions. We'll cover more complex formulas and filtering the data, along with special conditional if-then-else statements. Create advanced sorts and add subtotals while filtering the data to specify only what you want to see. Build interactive user prompts for searchable parameters and utilize the helpful report templates. Numerous hands-on workshops allow you to practice creating your own advanced reports.

# SESSION DESCRIPTIONS: PRE-CONFERENCE

## Data Access

Numerous tools are available to access your RTA data externally, share data with other applications, or pull data into Excel. Save time by exporting and importing data in many areas such as Customers, Parts, or Vehicles into Excel, where mass changes can be made and imported back into RTA. Utilize the many standard reports and new lookup lists capability to allow exporting to various formats and the many capabilities SQL server offers are discussed.

## Max Utilization of RTA

The RTA instructors conduct dozens of onsite consulting visits yearly with the goal of better utilization of the software to improve their fleet and operation. This class covers the most frequent areas that have been under-utilized or could be used by making small changes to the way the software was originally setup or how data is entered. Topics covered are features used throughout the software. Many are very easy to implement, yet yield stellar benefits.

## Paperless Inspections

Complete and store all your equipment inspections right in the RTA software with two optional Paperless Inspection Modules. These interactive programs allow the Driver or Mechanic to record inspection data, notes, defects, pass/fail by item and more. Multi-level inspection templates are designed to use on hundreds or thousands of inspections. Prompts are used to record data such as tire tread depth and defects can generate work order lines.

## Reports Analysis 2

This series focuses on the reporting side of the software. Session 2 focuses on the numerous vehicle reports to track costs, replacement, and more. The End of Period process is explained so you'll have a full understanding of the step-by-step procedure and how it affects the vehicle cost reports.

## Reports Analysis 4

This final session covers more important reporting features in the software, with an emphasis on the department and customer billing areas. The various rates and markups are explained, and the recommended billing reports are shown.

## Daily/Monthly Processes

This session presents standard operating procedures for scheduled work in the RTA software. We'll discuss Best Practices to optimize routines performed in RTA and discuss how one process affects another. We'll explain the most efficient daily routine to enter work orders, process fuel, check for PMs due and replenish the parts inventory. Establish step-by-step procedures for EOP to verify they're being completed in the correct order and nothing is missed during the process.

## New Features

Take advantage of this great opportunity to familiarize yourself with new features released in 2017-2018. We'll review and demonstrate many of the larger enhancements, and touch on numerous smaller enhancements that you may have missed. Just a few of the topics covered are multi-threading, exporting lookup list information, and the dashboard alerts. Hands-on workshops are provided to try out the numerous topics covered.

## Reports Analysis 1

This series focuses on the reporting side of the software. Session 1 puts an emphasis on Inventory, Parts, Tires, and Purchasing reports. If you're involved in the Parts or Purchasing Departments, attend to see the full range of reporting capabilities the software offers.

## Reports Analysis 3

This series focuses on the reporting side of the software. Session 3 is designed for those involved in the shop, including Shop Foreman and Fleet Managers. Reporting features covered include scheduling work to work completed, in addition to reports focused on shop personnel.

## System Tips for RTA Managers

This class is specifically designed for the "RTA Manager" responsible for maintaining and managing RTA software. Numerous management-level functions are discussed to assist in optimizing the system. Topics include user security, personalized settings, and much more. Best practices, dashboards and notifications are explained to limit or identify possible problems in the data or fleet.

# SESSION DESCRIPTIONS: CONFERENCE

## Barcoding

Keeping accurate inventory counts are an important function of every Parts Department. The full line of barcoding handheld equipment, along with other uses of the handhelds, are demonstrated to help your shop become more efficient in maintaining an accurate inventory and save time in the process.

## Dashboard Emails/Alerts

Whether you manage the entire fleet operation or are responsible for a portion therein, you need notification of possible issues. The Dashboard Email and Dashboard Alerts programs are designed to keep you informed of various metrics in your RTA system, and alert notifications for any anomalies.

## EFI: Automated Fuel Entry

Electronic Fuel Interface programs eliminate the need for manual data entry, this class explains the steps of running an EFI. The all-important EFI Exception reports are explained and corrective procedures due to bad mileage entries or excessive fuel use are discussed.

## EOP Procedures

Step-by-step procedures for End-of-Period are explained in detail to make the process timely, accurate, and complete. See the changes EOP makes, what areas are (and are not) affected, and the importance of regularly running EOP.

## Fuel Tracking

Tracking fuel and updating mileage have become more important than ever. We'll cover the steps to track fuel pumps and tanks accurately, identifying variances, and making corrections. Correct fuel usage is a must for MPG and CPM reporting.

## Client Success Story: Lean Fleet

Hear directly from one of RTA's clients on the success their company has had with a lean fleet, and learn from their best practices.

## Drivers Reports

RTA's Driver's Reporting module provides operators direct access to the shop to report equipment issues. These issues are then viewed by the shop and can be applied to a work order or can be closed. The user-friendly entry screen, shop input, and procedures are covered.

## Electronic Vehicle Charging (Fuel Force)

Hear from Fuel Force as they discuss Electronic Vehicle Charging, and the challenge of managing electricity as a standard fleet fuel.

## Export/Import Basics

Many options are available to export and/or import data in your RTA software. In addition to being able to export/import Vehicles, Parts, and VMRS codes, numerous others have just been released and more to follow. See how these and other standard programs allow you to move data into Excel, etc.

## Integrations

RTA has integrations available with a number of other software vendors. See examples of each as they are demonstrated and the manual data-entry they eliminate. These include integrations with Napa, Zonar, and GPS Insight, just to name a few.

# SESSION DESCRIPTIONS: CONFERENCE

## Intro to Crystal Reports

Crystal Reports is the popular reporting tool for relational databases such as SQL Server or Oracle. If you've been considering utilizing Crystal to create custom reports, attend this introductory course where we'll discuss the features and use of Crystal.

## Lightning Topic: Best Practices

Setup your own Best Practices to keep your staff informed and educated.

## Lightning Topic: Image Viewer

Attach MSDS sheets to parts, pictures of vehicles or accident damages, schematics and more.

## Lightning Topic: Training Vignettes

Informative online resources are shown, including RTA FAQ, knowledge base, full manual, training videos and more.

## Motor Pool Overview

RTA's renting and leasing module is a great tool for fleets billing customers or cost centers for equipment use. The numerous rate options are explained and we will cover creating reservations, check-out/in, and billing reports.

## Paperless Driver Inspections

Complete and store all your equipment inspections right in the RTA software with the optional Paperless Driver Inspection Module. This interactive programs allow the Driver to record inspection data, notes, defects, pass/fail by item and more. Defects can create a work order line for a repair needed.

## Lightning Topic: Barcoding

See all the options for barcoding hardware in action: scanners, portable hand-held and printers.

## Lightning Topic: Hosted Demo

A live demonstration of a hosted RTA system is shown, see the speed and flexibility of RTA in the cloud.

## Lightning Topic: Multi-Threading

See how to setup and utilizing the multi-threading in RTA to access numerous screens at once.

## Management Book Club: Recommended Reading

Join RTA's CEO, Josh Turley as he shares and discusses key takeaways from management books.

## OEM Warranties

Tracking OEM warranties can save your fleet thousands of dollars per year. Setup is quick and easy, and notifications of a job covered under warranty is immediate. From OEM bumper-to-bumper and extended power train warranties, to sublet job warranties are all explained.

## Paperless Mechanic Inspections

Complete and store all your equipment inspections right in the RTA software with the optional Paperless Mechanic Inspection Module. These interactive programs allow the Mechanic to record inspection data, with notes, defects, pass/fail by item and more. Time and defects are posted in the work order.

# SESSION DESCRIPTIONS: CONFERENCE

## Paperless Shop Management

This session covers the management side of Paperless Shop. We'll discuss scheduling options, prioritizing workload, management tools, and reports. Real-life solutions provided for questions that often arise.

## Parts & Purchase Order Shortcuts

This class is designed to reduce your data entry workload as we focus on time-saving tips and shortcut techniques throughout the inventory module. Post parts and in up to half the time with the quick-post options or PO links to work orders. Reorder parts quickly with less monitoring and more.

## Parts Warranties

Join the many fleets that have saved their company thousands by utilizing part warranty tracking in RTA. Begin tracking warranties on batteries and starters in minutes. See the immediate notifications and reporting features as a result. Then get ready to collect all the warranty reimbursements!

## PM Reports

This session covers the Preventive Maintenance reporting, including the new P.M. Compliance report. With the new P.M. Compliance report, see if your PMs are being done on time by date and mileage. Also see how the standard PM report prompts can be used to isolate only those you're looking for.

## Purchase Order Approvals

The purchase order approval process allows you to set maximum order amounts allowed by user. Expensive purchase orders can require upper management approval prior to being ordered. Multi-level capabilities make set-up easy and quick, and the PO prints display "Not Approved" until approved.

## Paperless Shop Mechanic

Utilizing the Paperless Shop module is the focus of this session. We cover it all – from clocking on and off both direct and indirect work to posting parts and history look-up. Along with options such as creating jobs and scheduling existing jobs, you'll see new features in Paperless Shop.

## Parts Reports

The reporting side of the parts module is covered in this session. Identify low-use parts, warranty info, usage, adjustments and more. Have a part quantity or price appear incorrect? See each report that tells the entire history of a part to identify why and how it was updated.

## Power: Lookup Lists

The new lookup displays have been enhanced to provide many more options. Custom design your own lookup lists for parts, vehicles, etc. Whenever accessed, your own custom list will appear. Add & remove fields, rearrange columns, apply ranges and sorts to be viewed, export the data and more.

## Protect & Correct Odometers

Meter readings are one of the most important data elements to retain accuracy to conducts PMs on time, maintain accurate history, and track warranties. We'll cover settings to help prevent inaccurate entries and reports to alert you of any red flags. And, of course, how to properly fix any mistakes.

## Purchasing Reports

The parts purchasing reports are thoroughly explained for you to find the exact data you're looking for. Identify open or backorders on POs, lookup purchases by vendor, invoice, part, or date range. Any purchase report questions are answered here.



# SESSION DESCRIPTIONS: CONFERENCE

## ROI w/ Fleet Technology by GPS Insight

GPS Insight will lead this session on how to maximize your ROI from fleet technology by aligning vehicle, fleet and corporate goals.

## Round Table: Benefits of Outsourcing

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on outsourcing areas such as the Parts Department in order to save money.

## Round Table: Employee Retention

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on best methods and practices on hiring and retaining employees.

## Round Table: Open Forum

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session is open to those attending. Have a question for other attendees, whether it relates to RTA or not? This is the forum.

## Round Table: Parts/Purchasing

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session is focused on parts and purchasing.

## Round Table: Barcoding Hands-On

The full line of barcoding equipment is on display and ready for you to try them out and see how they would work in your application. See how fast and easy it is to print dozens of part labels.

## Round Table: Creative Budget Solutions

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session is focused on budgeting, with creating solutions for problems we all face in creating and meeting the budgets.

## Round Table: New Users & Old Hats

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on sharing best practices among users of all experience.

## Round Table: Paperless Shop

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session is focused on implementing and managing a paperless shop environment.

## Round Table: SQL & Hosting Q&A

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on the benefits of a SQL database and having RTA host your software.

# SESSION DESCRIPTIONS: CONFERENCE

## Round Table: The Ideal Shop Setup

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on setting up the ideal shop, from the bays and shop design to the parts room layout.

## RTA & NAPA IBS: Reduce Fleet Downtime

Hear from the Vice President of NAPA Integrated Business Solutions as he discusses a technology solution to reduce fleet downtime and control costs.

## Service Bulletins & Recalls

The service bulletin program allows you to quickly create many work orders at once, for a specific job on a group of vehicles. Whether the job is an OEM recall, or an internal change to a group of vehicles, to putting vehicles into or out of service. The service bulletin/recall is then tracked through completion.

## SQL Features Overview

See the features a SQL database offers for your RTA system. From recent enhancements released that require a SQL database backend, to accessing data externally from the RTA system. If you're thinking about purchasing the SQL version or have recently upgraded, you'll see the benefits here.

## The Sins of Management

Join Goal Partners' business consultant, Fred Kroin, as he helps improve your management effectiveness by raising your awareness to the attitudes and behaviors leaders adopt that may negatively impact performance and productivity, and give you tools to use on the job.

## Round Table: Vehicle Replacement

Round tables are interactive discussions with the others attending. An RTA staff member will facilitate the session, but attendee participation and networking is the goal. This session focuses on identifying vehicles needing to be replaced, and policies and procedures of replacing them.

## RTA Hosting Services

Is RTA running slow on your hardware? Does it take months to install the updates? Are your RTA backups current? With RTA Hosting we have the solution for all of these issues. We'll show you how your RTA system can be installed on state-of-the-art server farm, accessible through the Internet.

## Shop Scheduler

The Shop Scheduler allows vehicles to be scheduled into a shop calendar for service. The shop sets up available time slots that are accessible to the others for scheduling maintenance on their equipment. The shop and your departments can schedule jobs, and find and request an available date and time.

## Technician Productivity

Tracking productivity has become increasingly important as fleets attempt to hold down expenses. From the initial setup to the weekly and monthly reports, you'll understand the entire process and exactly what the reports are indicating about the shop personnel.

## Time Management

Join Goal Partners' business consultant, Fred Kroin, as he provides helpful tips for successfully managing your time.

# SESSION DESCRIPTIONS: CONFERENCE

## Tires & Tire-Track

Tire costs are one of the biggest expenses in fleet maintenance. This class covers the basics of the module, from startup to tracking the important cost per mile by manufacturer and capper. Tire-Track will also show a permanent bar code label for tire identification.

## Vehicle Cost Reports

The RTA software contains many reports to provide valuable and precise vehicle costing – your reward for all the data input. You'll find which reports contain the information quickly needed, such as cost per mile, operating costs, repair expenses, and replacement estimates.

## Warranty Claims

Save your company thousands by utilizing Warranty Claims and other warranty features in RTA. The focus is on closing the gaps between warranty notification, submittal and reimbursement. The Claims module allows you to submit or receive claims with vendors, track aging, and post credits received.

## Work Order Shortcuts/Timesavers

This class is designed to reduce your data entry workload in the work order module. Learn the quickest posting options, utilizing templates, and the automatic links to purchase orders.

## User Maintenance & Alerts

This session user security, user customization, and the new User Logins screen and Alerts. See the new User Login screen to show who is in the system, what program they're accessing, and ability to send a notification. See the setup of the new Alerts program and the notifications in action.

## Vehicle Replacement

Identifying vehicles that need to be replaced and budgeting for the replacement is a process every fleet manager goes through. This session covers the replacement setup, reporting features, and the new Vehicle Replacement Report recently released.

## Work Order Reports

This class provides an in-depth look at the reporting side of the Work Order module. Identify reports that contain the information you need and will work best in your shop – the reward for the daily input. We'll examine history, billing, parts usage, labor hours, and more.

## Zonar

Hear from Zonar on the various aspects of their verified inspection reporting, GPS tracking and ELD-ready solutions.



# THANK YOU!



ENDLESS POSSIBILITIES TO **CONNECT**

