



2026 Plex-a-Palooza Agenda, R4.24.26

*Date	*Time Start	*Time End	Tracks	*Session Title	Description	Speakers
06/15/2026	01:00 PM	05:00 PM	4 hour workshop;Platfor	Hands On Workflow	Hands-on, four hour workshop on how to create workflows. Bring your laptop and join in. This session is not included in the standard training - additional cost of \$100 per attendee. Seating is limited. PLEASE NOTE: To register for this session be sure to include your request with the name of the session requested, and the person who wants to attend, in your registration email to Jill (jill@controlm.solutions) and then add their name on the session waitlist when you log into the app. As soon as Jill has invoiced your company, we'll take your name off the waitlist and add it to the session. We are controlling our invoicing using the session cap, which may look misleading. Appreciate your understanding!	Albie Bell
06/15/2026	01:00 PM	05:00 PM	4 hour workshop;Report	Hands on Plex Analytics (aka IntelliPl	In this hands-on session, we 'll bring Plex Analytics to life and show how manufacturing data turns into real, actionable insight. You 'll move beyond static reporting and learn how to explore data, uncover drivers of performance, and surface insights that teams can actually use - all directly inside Plex. We 'll build production reports, dig into utilization trends, layer in additional data, and transform it all into dashboards that support faster, smarter decisions. If you 're looking to understand what 's happening, why it 's happening, and what to do next - this session is for you. Come ready to explore, build, and rethink what Plex Analytics can do. Agenda: Getting Oriented Quick introductions and what we 'll accomplish together A Quick Look at Plex Analytics What Plex Analytics is (and what it isn't 't)How We Think About Analytics in Plex Walking through the analytics lifecycle Getting Hands-On: Environment ; Tools Logging in ; Navigating the Analytics workspace Building Reports Creating a basic production-focused report with calculations and business logic Going Deeper with Utilization Analysis Moving from "what happened"; to "why it happened"; Exploring Ad-Hoc Analysis Quickly creating ad-hoc views without complex queries Turning Insights into Dashboards Reusing reports and analyses to build dashboards Sharing, Scaling, and Governing Analytics Publishing and distributing analytics content Wrapping Up Key takeaways and why Plex Analytics matters This session is not included in the standard training - additional cost of \$100 per attendee. Seating is limited. PLEASE NOTE: To register for this session be sure to include your request with the name of the session requested, and the person who wants to attend, in your registration email to Jill (jill@controlm.solutions) and then add their name on the session waitlist when you log into the app. As soon as Jill has invoiced your company, we'll take your name off the waitlist and add it to the session. We are controlling our invoicing using the session cap, which may look misleading. Appreciate your understanding!	Dan Mullins
06/15/2026	01:00 PM	05:00 PM	4 hour workshop;Genera	Operational Excellence Deep Dive	Join John Howard II as he covers the basics of how you can start an Operational Plexcellence initiative at your company. He'll point out ways to use Plex to identify leading and lagging indicators, identify waste, find hidden factories on your floor and how to make every process more efficient and effective. Bring a method of note taking, an open mind, and all your problems to this session! This session is not included in the standard training - additional cost of \$100 per attendee. Seating is limited. PLEASE NOTE: To register for this session be sure to include your request with the name of the session requested, and the person who wants to attend, in your registration email to Jill (jill@controlm.solutions) and then add their name on the session waitlist when you log into the app. As soon as Jill has invoiced your company, we'll take your name off the waitlist and add it to the session. We are controlling our invoicing using the session cap, which may look misleading. Appreciate your understanding!	John Howard
06/15/2026	01:00 PM	05:00 PM	4 hour workshop;Shippin	Hands On Shipping Documents	Hands-on, four hour workshop on how to create customer specific shipping documents in Plex UX. This session is not included in the standard training - additional cost of \$100 per attendee. Seating is limited. PLEASE NOTE: To register for this session be sure to include your request with the name of the session requested, and the person who wants to attend, in your registration email to Jill (jill@controlm.solutions) and then add their name on the session waitlist when you log into the app. As soon as Jill has invoiced your company, we'll take your name off the waitlist and add it to the session. We are controlling our invoicing using the session cap, which may look misleading. Appreciate your understanding!	Justyna Walker
06/15/2026	07:00 PM	10:00 PM	Networking	Welcome Reception	Join us for fun and snacks at the welcome reception	Patti Nowak
06/16/2026	07:00 AM	08:00 AM	Networking	Breakfast		
06/16/2026	08:00 AM	09:30 AM	Keynote	Opening and Keynote	Opening of PAP 2026 !	Patti Nowak
06/16/2026	10:00 AM	11:00 AM	Roundtable	Plastics Roundtable	Plastics including molding and machining Roundtable	Dan Mullins
06/16/2026	10:00 AM	11:00 AM	Platform;Reporting	Plex Reports: Finding, Enabling, Most	Learn how to find and enable the full library of available Plex Reports, understand which reports deliver the most value, and identify the data and configuration requirements needed to use them effectively. This session equips you to unlock insights already built into Plex and put the right reports to work for your operation.	Angie Abarca
06/16/2026	10:00 AM	11:00 AM	HR	Employee Reviews	Employee Reviews	David Chupp
06/16/2026	10:00 AM	11:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/16/2026	10:00 AM	11:00 AM	Accounting	Project Accounting (aka Accounting J	Project Accounting - aka Accounting Jobs - setting them up, monitoring progress, converting to assets	Bill Carney
06/16/2026	10:00 AM	11:00 AM	UX	UX Transition Planning	If you are planning for UX transition and are unsure of the new functionality and benefits of Plex UX, join this session to learn more about Plex UX transition. This session can also help you better prepare for UX by outlining key differences in security, reports, menu structure, navigation and more.	Stefanie Krause
06/16/2026	10:00 AM	11:00 AM	Reporting	IP/Analytics Reports	IntelliPlex Dashboards, Burst Reports, Scheduling Reports	Alex Tarleton
06/16/2026	11:00 AM	12:00 PM	Accounting	Journal Entry Options	General Ledger Journal Entries Options - including allocations, repeating, reversing and uploading	Chris Dodson
06/16/2026	11:00 AM	12:00 PM	Production	Cycle Counting Best Practices	Cycle Counting Best practices - including inventory accuracy, SCAR variances	Bill Carney; Matt Shamblin
06/16/2026	11:00 AM	12:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/16/2026	11:00 AM	12:00 PM	General Business	Effective Email Communication	Effective email communication	Rikki Mason



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06/16/2026	11:00 AM	12:00 PM	Quality	Advanced Quality	FMEAs, corrective actions, 8D 's and Deviations, PPAP and non-conformances	Gary Eubank
06/16/2026	11:00 AM	12:00 PM	Planning and Scheduling	MRP for Practitioners	This session is designed for daily users of MRP in Plex Manufacturing Cloud, focusing on how to interpret action signals, manage planning parameters, and improve data inputs. Learn how Plex drives demand and supply, reduce system noise, and take confident action on MRP recommendations to better align production and purchasing.	Albie Bell
06/16/2026	12:00 PM	01:00 PM	Networking	Lunch		
06/16/2026	01:00 PM	02:00 PM	Production; Planning and	Capacity Planning	Join Patti Nowak, owner of Control+M Solutions as she covers the Plex capacity planning tool. She will cover the importance of updated workcenter and shipping calendars, and shifts, as well as review the labor planning tool for the capacity module. She will walk you through the impact of master data on the capacity plan, methods of demand and the best use case for each method. She will also be covering a custom capacity plan that simply covers labor alone, that we can quickly roll out to your PCN if needed. This is a great tool for customers who rely more on personnel than equipment capacity for certain processes. Since it's fully developed it's just a copy into your PCN if you need it.	Patti Nowak Matt Shamblin; Alex Baumann
06/16/2026	01:00 PM	02:00 PM	Quality	Supplier Scorecards	Supplier scorecards development and deployment	
06/16/2026	01:00 PM	02:00 PM	Integration; Accounting;	Optic AI + Plex: Real World AI Autom	Plex users face a daily grind of manual data entry - especially when dealing with complex Customer POs and AP invoices that require splitting, merging, and line level validation. Optic AI eliminates this burden. In this session, Carsley Solutions will demonstrate how Optic AI automates Customer PO entry, digitizes order data, and handles even the most complicated AP invoice matching scenarios, including multi line splits, merges, and exception detection. Powered by Carsley 's Control Hub middleware, Optic AI pushes clean, validated transactions directly into Plex, enabling a fully automated, exception driven workflow. The result is faster processing, fewer errors, and dramatically reduced manual effort.	Mike McCormick
06/16/2026	01:00 PM	03:00 PM	Roundtable;Food and Be	F&B, CPG Roundtable	Food and Beverage, Consumer Packaged Goods Roundtable discussion. Bring your questions and comments to discuss issues and ideas with other Plex customers.	Ken Keller
06/16/2026	01:00 PM	02:00 PM	Platform	Process Flows	What if the people who know the process best could actually build it-without writing code, waiting on developers, or breaking governance rules? That 's exactly what Plex Process Flows enables. In this energetic, practitioner-focused session, we 'll show how Plex Process Flows empower citizen developers to design tailored, production-ready business processes using modern, no-code, drag-and-drop tooling-right inside Plex. We 'll start with a quick walkthrough of how Process Flows let you compose flows, not code. You 'll see how simple, sequential steps-data operations, logic, and built-in Plex subprocesses like scheduling orders, routing workflows, adding parts, or closing jobs-can be stitched together into clean, intuitive flows that guide work exactly the way your business runs. Then we jump straight into the hands-on lab. You 'll design a Process Flow using an easy, visual drag-and-drop interface Automate calculations for standard or custom fields Trigger notifications, approvals, and exception handling Coordinate related data seamlessly across Plex modules We 'll also cover how Process Flows are built for the real world-not just demos. You 'll see how to deploy with confidence using version control, seamless promotion, and rollback, and how flows can be triggered through schedules, events, user interactions, and Apis. If you 've ever relied on tribal knowledge, spreadsheets, or "don 't forget to do third; emails, this session will feel like a breath of fresh air. Perfect for technical presales, solution architects, consultants, and anyone who wants to show how Plex turns manual work into automated, governed, scalable execution-without customization sprawl. Design the process. Automate the execution. Let Plex handle the rest.	Dan Mullins
06/16/2026	01:00 PM	02:00 PM		Available for Duplicate Session 1	TBD	
06/16/2026	02:00 PM	03:00 PM	Hardware;Production;Sh	Hardware Options in Plex including R	Hardware Options in Plex including RFID	
06/16/2026	02:00 PM	03:00 PM	General Business	Operational Excellence	Operational Excellence - short session	John Howard
06/16/2026	02:00 PM	03:00 PM	Production	Correcting Scrap Recording Errors	Ever have operators recording scrap, that is incorrect and needs to be fixed the correct way? Attend this session to learn the proper method for correcting scrap records, we will even touch on the financial implications.	Rebecca Schmidt
06/16/2026	02:00 PM	03:00 PM	Quality;Sales	Automotive Program and Project Ma	Learn how to manage customer and internal programs and associated parts with respect to project timing, market, and volume projections. Define and manage program/project goals, steps, due dates, tasks, etc., and manage all aspects of new product development from required tooling, quotes, quality, budget, inventory, shipments, etc.	Justyna Walker
06/16/2026	02:00 PM	03:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/16/2026	02:00 PM	03:00 PM	Security;UX	UX Transition Security	This is a great session for those who haven't transitioned yet from Classic to UX or for those that have transitioned and are looking to clean up your existing security. I will offer some best practices navigating the differences in security between the 2 platforms. We will talk about the first steps and the best ways to successfully manage your security.	Shannon Hadley
06/16/2026	02:00 PM	03:00 PM	AI	Artificial Intelligence in Plex	Artificial Intelligence Discussion	Mike Hart



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06/16/2026	03:00 PM	04:00 PM	Reporting	SQL basics / VisionPlex screen building	Ever wanted to build Plex screens that actually answer questions instead of just displaying data? This session is all about connecting simple SQL fundamentals with VisionPlex screen design to turn raw manufacturing data into clear, actionable insights. We'll kick things off with the SQL basics that matter for VisionPlex-how data sources work, why columns matter, and how near real-time reporting comes to life when you use well-structured SQL behind the scenes. No deep-dive database theory here-just what you need to confidently support VisionPlex screens. From there, we jump into VisionPlex screen building, where you'll see how easy it is to create custom grids, charts, and graphs tailored to real manufacturing use cases. You'll learn how VisionPlex fits into the Plex platform, when to use published data sources versus custom SQL, and how to design screens that are both powerful and user-friendly. The real fun starts in the hands-on portion, where you'll: Highlight exceptions automatically Calculate key values on the fly Drive smarter decisions right from the screen Replace static reports with dynamic, interactive views If you've ever opened a VisionPlex screen and thought, "This could do more," this session is for you. Own your data. Build smarter screens. Make Plex work the way you think.	Dan Mullins
06/16/2026	03:00 PM	04:00 PM	Hardware;Shipping	Plex Mobile - Hardware Focused, Best connectivity	Join Kenyce as they cover best practices in Plex Shipping including but not limited to scanning best practices, hardware availability and Plex connectivity	
06/16/2026	03:00 PM	04:00 PM	Accounting	Financial Statements	Does your balance sheet not balance? Does your operations team ask you why gross margin constantly changes? Do you need a P;L for a specific department? Well head down to the financial statement training! We will show you how to develop, format and export financials. We will also talk Consolidated Financial Statements. See you there!	Zack Farley
06/16/2026	03:00 PM	04:00 PM	Quality	Audits	Looking to improve how audits are managed in Plex? This session will review internal and supplier audit functionality, compare the strengths of the Audit and Checklist modules for different use cases, and demonstrate how layered process audits can be structured to generate actionable reporting and performance metrics.	Kevin Poppe
06/16/2026	03:00 PM	04:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/16/2026	03:00 PM	04:00 PM	Production	Piece Serialization Production	Piece Serialization production	Alex Baumann
06/16/2026	03:00 PM	04:00 PM	Platform	Custom Fields: Learn how to build new	Learn how to build Custom Fields inside Plex Standard Objects with no database skills needed. You'll explore how to confidently extend the Plex data model and create clean, structured spaces within the Plex database to capture the unique, business-specific information your operation needs, but Plex doesn't track out of the box.	Angie Abarca
06/16/2026	03:00 PM	04:00 PM	Accounting	Available for Duplicate Session	TBD	
06/16/2026	03:30 PM	04:45 PM	General Business	Private OpX - Transformation Corner	These OpX Transformation Corner Sessions are designed for independent coaching with individuals or corporate teams. We can review specific issues as well as explore any topics from ERP ROI, how to empower new PLEX users with immersive process integration for maximum adoption and coach mature PLEX users in optimizing for stronger business health, functional governance and achieving your strategic North Star objectives, etc...	John Howard
06/16/2026	04:00 PM	05:00 PM	Production	Visual Plant Floor Best Practices	Together, we will review all of the various elements that go into designing your own visual plant floor; adding workcenters, talking about layouts, custom icons and best practices. After this session, you will be able to start creating your very own Visual Plant Floor !	Shannon Hadley
06/16/2026	04:00 PM	05:00 PM	Shipping	Plex Mobile	Plex Mobile features and integration	Matt Shamblin
06/16/2026	04:00 PM	05:00 PM	Quality;Food and Beverage	Rework for Food and Beverage	See and hear about the multiple options in Plex for managing rework for Food ; Beverage customers, including some real-life experiences. Understand the various reasons for selection of those varied processes, and realize that the simple solutions are often the best methods.	Ken Keller
06/16/2026	04:00 PM	05:00 PM		Available for Duplicate Session 5		
06/16/2026	04:00 PM	05:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/16/2026	04:00 PM	05:00 PM	Quality	Checksheets	Learn how part specifications, inspection modes, sample sizes, and checksheets work together to drive meaningful Statistical Process Control (SPC) data. This session focuses on how these foundational quality components connect, starting with defining part requirements and inspection strategies, through sample size selection, and into well-designed checksheets that support consistent data collection. Attendees will gain a clearer understanding of how to align these elements to ensure accurate, actionable SPC results. Whether you are setting up inspections for the first time or refining existing processes, this session will show how to configure and use checksheets effectively to capture critical quality data and support quality analysis and informed operational decisions.	Amber Zancolli
06/16/2026	04:00 PM	05:00 PM	Community	Community	Community	Blake Ethridge
06/16/2026	04:00 PM	05:00 PM	Part engineering	Part/ Item Revision Change Manager	Join this session to learn more about tracking and managing part revisions and revision changes in Plex. Learn how Plex manages engineering changes using the Plex ECR module to track part lifecycle, inventory, tooling, and much more.	Stefanie Krause
06/16/2026	07:30 PM	09:30 PM	Networking	Women in the Plex Community - Rock	This social event is focused on Women in the Plex Community, and the Rockwell WEB (Women Electrifying Business) group, to provide a chance to network,, exchange ideas and help each other grow as professional women. Jessica Williams has once again prepared a fun evening of activities sure to help you make new friends and reconnect with old ones. We will serve drinks and light desserts at this private event - please be sure to register for it so we make sure we have enough room and refreshments' course men are welcome!!!	Patti Nowak
06/17/2026	07:00 AM	08:00 AM	Networking	Breakfast		



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06/17/2026	08:00 AM	09:00 AM	Platform	Plexpanding - Additional facilities and	Join Rebecca Schmidt and Chris Dodson from Control+M Solutions as she talks about strategy for expanding your Plex footprint into new facilities. She will cover concepts such as buildings vs new PCNs, planning impacts, inventory location updates, intercompany shipping, workcenters, data copies, centralized cash management, consolidated financial statements, using a COA to break out multiple businesses, DCS configuration, prefix planning and security controls available by building.	Rebecca Schmidt; Chris Dodson
06/17/2026	08:00 AM	09:00 AM	Platform	Leading Practices of Extending PLEX	As manufacturers continue to modernize, the role of Plex often expands beyond its core footprint. This session will highlight leading practices for extending Plex in a way that supports greater visibility, stronger operational alignment, and more connected decision-making. We will share perspectives on how teams are approaching integration, data access, and system extension to meet evolving business needs without overcomplicating the landscape.	Tom Wroblewski
06/17/2026	08:00 AM	09:00 AM	Accounting	Budgeting	Using the Plex Budgeting System	Bill Carney
06/17/2026	08:00 AM	09:00 AM	General Business	Excel and Plex	We will cover different methods and shortcuts that you can use to effectively manage your exported data or data for uploads using Excel. I will help you make the decision of when to use what file format and cover best practices for managing those upload files.	Shannon Hadley
06/17/2026	08:00 AM	09:00 AM	Production;Shipping;Food	Warehouse Management for Consumer	CPG manufacturers are under constant pressure to operate faster, work smarter, and stay agile in an increasingly demanding supply chain. In this session, learn how modern warehouse management powered by Cella helps CPG companies improve accuracy, enforce FEFO/FIFO and traceability, and give teams real-time visibility into warehouse operations. Join us for a practical look at how manufacturers are simplifying material movement and gaining better control of their warehouse operations.	Martin Black; Jason Prater
06/17/2026	08:00 AM	09:00 AM	Platform	Plex Optimization Techniques	Optimizing your use of Plex	Patti Nowak
06/17/2026	08:00 AM	09:00 AM	Sales	Quoting in Plex	Not sure where to begin with quoting in Plex-or how to improve the process you already have? This session will walk through a practical roadmap for implementation, show how to use key Plex features to solve every day quoting challenges, and explore metrics that help teams improve quote speed, consistency, and customer responsiveness.	Kevin Poppe
06/17/2026	09:00 AM	10:00 AM	Production	Heat Treat Manager/Furnace Manager	Heat Treat Manager/Furnace Manager	Gary Eubank
06/17/2026	09:00 AM	10:00 AM	Quality	Rework	Rework - proper routing setup and rejection processing including costing	Alex Baumann
06/17/2026	09:00 AM	10:00 AM	EDI	EDI Automation with APIs	Automating Customer and Supplier Orders, 3PL, Releases, Shipping, Receiving, Invoicing, and Validations. All with Plex API.	Lorren Riggle
06/17/2026	09:00 AM	10:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/17/2026	09:00 AM	10:00 AM	Reporting	Advanced IP Analytics	Analytics (Intelliplex)	Alex Tarleton
06/17/2026	09:00 AM	10:00 AM	Roundtable;Accounting	Accounting Roundtable	Accounting Roundtable	Chris Dodson; Patti Nowak
06/17/2026	09:00 AM	10:00 AM	Costing	Dueling Banjos Costing	Discussions about standard vs actual in Plex have been had for years. Bill Carney from Plante Moran and Zack Farley from Control+M Solutions will team up to walk you through the capabilities, benefits and risks of both in this interactive session. Bring all your costing questions along!	Zack Farley; Bill Carney
06/17/2026	09:00 AM	10:45 AM	General Business	Private OpX - Transformation Corner	These OpX Transformation Corner Sessions are designed for independent coaching with individuals or corporate teams. We can review specific issues as well as explore any topics from ERP ROI, how to empower new PLEX users with immersive process integration for maximum adoption and coach mature PLEX users in optimizing for stronger business health, functional governance and achieving your strategic North Star objectives, etc...	John Howard
06/17/2026	10:00 AM	11:00 AM	Quality	Rejection Control	Discover the various options available in the Rejection Control module. From rejection jobs, to sort container, to material review boards, see examples of how each is used to manage defective inventory and learn which option may be best for you and your company.	Ken Keller
06/17/2026	10:00 AM	11:00 AM	Integration	Integration basics using n8n and Data	Cumulus to provide overview	David Chupp
06/17/2026	10:00 AM	11:00 AM	Costing	Standard Costing	Costing - Standard Costing including inventory analysis	Bill Carney
06/17/2026	10:00 AM	11:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/17/2026	10:00 AM	11:00 AM	Roundtable;Costing	Costing Roundtable	This will be an open forum - bring your costing questions, whether they are for standard, job actual, or actual costing, to this session!	Chris Dodson; Patti Nowak



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06/17/2026	10:00 AM	11:00 AM	Platform	Process Flows	<p>What if the people who know the process best could actually build it-without writing code, waiting on developers, or breaking governance rules? That 's exactly what Plex Process Flows enables. In this energetic, practitioner-focused session, we 'll show how Plex Process Flows empower citizen developers to design tailored, production-ready business processes using modern, no-code, drag-and-drop tooling-right inside Plex. We 'll start with a quick walkthrough of how Process Flows let you compose flows, not code. You 'll see how simple, sequential steps-data operations, logic, and built-in Plex subprocesses like scheduling orders, routing workflows, adding parts, or closing jobs-can be stitched together into clean, intuitive flows that guide work exactly the way your business runs. Then we jump straight into the hands-on lab. You 'll: Design a Process Flow using an easy, visual drag-and-drop interface Automate calculations for standard or custom fields Trigger notifications, approvals, and exception handling Coordinate related data seamlessly across Plex modules We 'll also cover how Process Flows are built for the real world-not just demos. You 'll see how to deploy with confidence using version control, seamless promotion, and rollback, and how flows can be triggered through schedules, events, user interactions, and Apis. If you 've ever relied on tribal knowledge, spreadsheets, or "don 't forget to do this"; emails, this session will feel like a breath of fresh air. Perfect for technical presales, solution architects, consultants, and anyone who wants to show how Plex turns manual work into automated, governed, scalable execution-without customization sprawl. Design the process. Automate the execution. Let Plex handle the rest.</p>	Dan Mullins
06/17/2026	10:00 AM	11:00 AM		Available for Duplicate Session 3	TBD	
06/17/2026	11:00 AM	12:00 PM	Reporting	SQL basics / VisionPlex screen buildin	<p>Ever wanted to build Plex screens that actually answer questions instead of just displaying data? This session is all about connecting simple SQL fundamentals with VisionPlex screen design to turn raw manufacturing data into clear, actionable insights. We 'll kick things off with the SQL basics that matter for VisionPlex-how data sources work, why columns matter, and how near real-time reporting comes to life when you use well-structured SQL behind the scenes. No deep-dive database theory here-just what you need to confidently support VisionPlex screens. From there, we jump into VisionPlex screen building, where you 'll see how easy it is to create custom grids, charts, and graphs tailored to real manufacturing use cases. You 'll learn how VisionPlex fits into the Plex platform, when to use published data sources versus custom SQL, and how to design screens that are both powerful and user-friendly. The real fun starts in the hands-on portion, where you 'll: Highlight exceptions automatically Calculate key values on the fly Drive smarter decisions right from the screen Replace static reports with dynamic, interactive views If you 've ever opened a VisionPlex screen and thought, "This could do more,;" this session is for you. Own your data. Build smarter screens. Make Plex work the way you think.</p>	Dan Mullins
06/17/2026	11:00 AM	12:00 PM	Integration	Integration Basics	This session will cover Plex Integration basics using methods like API 's, data sources, web services, and ODBC	Mike McCormick
06/17/2026	11:00 AM	12:00 PM	HR	Injury Tracking	Join me to learn how to implement the Injury Tracking module in Plex and set it up for everyday use. We 'll cover how to configure key options like OSHA reporting, injury categories, record types, treatment and workers ' comp indicators, default settings, and notification emails so the module works the way your organization needs it to. Ideal for teams rolling out or refining Injury Tracking, this session focuses on practical setup tips that help ensure clear reporting, consistent documentation, and a smooth implementation experience.	Amber Zancolli
06/17/2026	11:00 AM	12:00 PM	EDI	EDI Deep Dive	EDI Deep Dive including EDI reporting best practices, managing EDI tech services, and GS1 Data Standards for labeling	Veronica Meyer
06/17/2026	11:00 AM	12:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/17/2026	11:00 AM	12:00 PM	Sales	Customer Pricing Options	Customer pricing options Include tariffs, misc. charges, etc Covering services, charges, and setting up parts as services.	Michael Pobur
06/17/2026	11:00 AM	12:00 PM	Costing;Production;Acco	Ops and Finance Working Together	Does your finance team speak gibberish? Do your operations team 's decisions involve feelings? These are trying times. Come to the Ops and Finance team working together session to learn: managing operational KPIs that drive financial results, SCAR variances, their root causes, and how to move as a cross functional team.	Zack Farley; John Howard
06/17/2026	11:00 AM	12:00 PM	Production	Control Panel Tweaks	Want to learn about options in the Control Panel that may make your operator 's lives easier or more streamlined? Attend this session to learn about Control Panel Tweaks we commonly see as best practices that can ease system related stress on the shop floor!	Rebecca Schmidt



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06/17/2026	12:00 PM	01:45 PM	Keynote; Networking	Lunch: Plex Community Awards and Aerospace and Defense Roundtable	Join Blake Ethridge for the 2026 Plex Community Awards ceremony, followed by Mike Hart from Rockwell for a Plex Roadmap Update. The event will take place during lunch, starting approximately 12:20 to give folks time to grab some food and get a seat.	Blake Ethridge; Mike Hart
06/17/2026	02:00 PM	03:00 PM	Roundtable	Aerospace and Defense Roundtable	Aerospace and Defense Roundtable	Chris Balow
06/17/2026	02:00 PM	03:00 PM	Platform;Reporting	Plex Reports: Finding, Enabling, Most	Learn how to find and enable the full library of available Plex Reports, understand which reports deliver the most value, and identify the data and configuration requirements needed to use them effectively. This session equips you to unlock insights already built into Plex and put the right reports to work for your operation.	Angie Abarca
06/17/2026	02:00 PM	03:00 PM	Production	OEE	OEE in Plex - how it's calculated, how to guide your team to act in a way that provides Plex the right data to reflect reality	Matt Shamblin
06/17/2026	02:00 PM	03:00 PM	Shipping	Shipping Made Easier	Shipping made easier including drop shipping	Lorren Riggle
06/17/2026	02:00 PM	05:00 PM	Prospect	Prospect Track	Rockwell to define prospect track, separate sign up	Patti Nowak
06/17/2026	02:00 PM	03:00 PM	Production	Kitting Options	Kitting options	Justyna Walker
06/17/2026	02:00 PM	03:00 PM	AI	Automating Steel CERTs in Plex with	American Metal Group 's (AMG 's) shipping team was spending 5&ndash;10 minutes per load tracking down Part CERTs and Mill CERTs across multiple systems. Carsley Solutions partnered with AMG to automate the entire CERT workflow using our Control Hub AI-driven integration middleware-eliminating hours of manual work each day, boosting accuracy, and enabling documents to reach customers in minutes rather than hours. Join Michael McCormick, George Gilfond, and AMG 's Brandon Barnett as they walk through the solution, share real-world results, and give a preview of the workflow using fictitious but realistic data.	Mike McCormick
06/17/2026	03:00 PM	04:00 PM	Roundtable	Quality Roundtable	Discuss industry trends with other QA professionals and group discussion of best practices	Kevin Poppe
06/17/2026	03:00 PM	04:00 PM	Platform	Plex Tips and Tricks	We are going to spend some time talking though various topics that can help you navigate your day to day activities in Plex and maybe even give you some ideas about starting some new projects. All topic discussions will be high level. You will have the opportunity to go into more detail with me 1 on 1 after the session and at any time in the days that follow.	Shannon Hadley
06/17/2026	03:00 PM	04:00 PM	HR	Advanced HR Options	Go beyond core HR in Plex Manufacturing Cloud and explore advanced modules that support long-term workforce development and compliance. This session highlights functionality such as Employee Reviews, Strategic Planning, and Health ; Safety, with a focus on how these tools can be configured and integrated into your daily operations. Learn how to extend Plex HR to drive performance management, support organizational goals, and enhance workplace safety.	Albie Bell
06/17/2026	03:00 PM	04:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	Rebecca Schmidt; John Howard
06/17/2026	03:00 PM	04:00 PM	Production;Quality	Quality and Operations Working Tog	Quality and Operations- Cross Functional Session	
06/17/2026	03:00 PM	04:00 PM	Roundtable	Automotive Roundtable	Automotive, Metal Stamping, Fabrication Roundtable: Automotive related pain points and how others are using Plex to aid, or things that we need Plex to assist with	Chris Balow
06/17/2026	04:00 PM	05:00 PM	Roundtable	HR Roundtable	HR Roundtable	David Chidsey; Pat Welsh
06/17/2026	04:00 PM	05:00 PM	Part engineering	Secondary Ops and Alternative Routi	Tips for secondary operations and alternative routings	Alex Baumann
06/17/2026	04:00 PM	05:00 PM		Driving Value with Plex Customer Suc	Join Christian Bittner and Jamieson Shapker as they help you understand the role of Customer Success at Plex by Rockwell, and how you can leverage your CSM to help you grow your Plex utilization.	Christian Bittner; Jamieson Schapker
06/17/2026	04:00 PM	05:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/17/2026	04:00 PM	05:00 PM	Platform	New Functionality in Plex	New functionality, such as digital work instructions, process flows, etc -could be customer delivered	Devin Burke
06/17/2026	04:00 PM	05:00 PM	Planning and Scheduling	Finite vs Infinite Scheduling	Legacy Finite Scheduling vs Infinite Scheduling	Chris Dodson
06/17/2026	07:00 PM	10:00 PM	Networking; Prospect	Plex-a-Palooza Unplugged: Social Ev	After you have enjoyed the Harley Davidson Museum, join us at the Harley MOTOR Bar and Restaurant (aka "the Garage"), 400 West Canal Street. We will provide drinks and heavy appetizers, and games. We'll be celebrating RETRO PLEX night, so wear your old gear - and win prizes for the oldest or most unique Plex gear! Please note, this year we will have the Harley Davidson Museum open from 5-8 pm so you can go inside and enjoy the museum before the party. This venue is walkable from the Casino or you can catch an uber.	Patti Nowak
06/18/2026	07:00 AM	08:00 AM	Networking	Breakfast		
06/18/2026	08:00 AM	09:00 AM	Sales	Advanced CRM Tools	Ready to take your Plex CRM capabilities to the next level? In this session we will discuss Opportunity Tracking, Customer Cockpit options, and Sales Forecasting to give your company a competitive edge!	Rebecca Schmidt



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*Date	*Time Start	*Time End	Tracks	*Session Title	Description	Speakers
06/18/2026	08:00 AM	09:00 AM	Security	Building Scalable Security Across Plex	Join Laurie Elsener from Constellium Automotive USA and Justin Wildesen from Werner for a practical discussion on modernizing security across Plex and OT environments. Laurie will share how Constellium developed a scalable, position-based Plex security model aligned with governance and SOX IT application control requirements. Justin will connect that journey to broader OT security best practices, including secure architecture, segmentation, remote access, and industrial network resilience.	Laurie Elsener; Justin Wildesen
06/18/2026	08:00 AM	09:00 AM	Accounting	Accounts Receivable	AR Invoicing – covering options like self billing, bill and hold, invoice formats, and automated methods of sending invoices to your customers	Bill Carney
06/18/2026	08:00 AM	09:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/18/2026	08:00 AM	09:00 AM	Production;Shipping	Sequencing in Shipping and Production	This case study highlights a successful implementation of the Plex Sequencing module to support shipping ILVS to Ford. Learn how one company configured and deployed sequencing within Plex Manufacturing Cloud to meet customer-specific requirements, improve shipping accuracy, and streamline outbound processes. Gain practical insight into challenges, lessons learned, and the impact of sequencing on operational performance.	Albie Bell; Dan Jenkins
06/18/2026	08:00 AM	09:00 AM	Maintenance	Maintenance	Maintenance - ADVANCED including MTRR and MTBF calculation in Maintenance Module	Stefanie Krause
06/18/2026	08:00 AM	09:00 AM	Integration; Accounting;	PLEX Invoice Automation Driven by AI	Discover how PLEX manufacturers are enhancing OCR with AI-driven automation for faster, more accurate AP processes with a pre-built integration by Revolution Group. Traditional OCR has been a helpful tool for invoice capture, but manufacturers need more speed, accuracy, and adaptability to keep up with complex AP demands. In this session, Nimbello and their customers will showcase how their AP process has been automated through augmented OCR with AI-powered capture and matching that integrates natively with PLEX thanks to Revolution Group. By directly leveraging vendor records, GLs, receipts, and POs, AP teams can streamline processes, reduce overhead, and close faster with greater confidence. A customer guest speaker will share their experience achieving higher accuracy, stronger scalability, and measurable cost savings. Attendees will leave with practical strategies to modernize AP and unlock new levels of efficiency.	Sunjay Agtey
06/18/2026	09:00 AM	10:00 AM	Production; Planning and Scheduling	Capacity Planning	Join Patti Nowak, owner of Control+M Solutions as she covers the Plex capacity planning tool. She will cover the importance of updated workcenter and shipping calendars, and shifts, as well as review the labor planning tool for the capacity module. She will walk you through the impact of master data on the capacity plan, methods of demand and the best use case for each method. She will also be covering a custom capacity plan that simply covers labor alone, that we can quickly roll out to your PCN if needed. This is a great tool for customers who rely more on personnel than equipment capacity for certain processes. Since it's fully developed it's just a copy into your PCN if you need it.	Patti Nowak
06/18/2026	09:00 AM	10:00 AM	Planning and Scheduling	New Plex Finite Scheduling	Introduction to the new Finite Scheduling System Plex introduced this year	Dan Mullins
06/18/2026	09:00 AM	10:00 AM	Sales	Customer Returns	This session walks through how to use the Customer Returns module in Plex to manage product returns efficiently and maintain accurate documentation. Attendees will learn how to create and update customer return records, issue Return Material Authorization (RMA) numbers, process returns through receipt and credit memo creation, and handle scenarios such as multiline credits and products that are not physically returned. The session also covers how customer returns can be connected to Problem Control to support root cause analysis and corrective action, helping teams improve visibility, consistency, and follow through across the return process.	Amber Zancolli
06/18/2026	09:00 AM	10:00 AM	Accounting; AI	The Intelligent Back Office: AI-Powered	If your AP team is keying invoices and your AR team is reconciling remittances by hand, you're leaving efficiency, accuracy, and working-capital visibility on the table. This session shows how Plex customers are automating both sides of the ledger. On the AP side, we'll demo Easy Payables - Plex-integrated invoice capture, approval routing, and posting. On the AR side, we'll walk through Valenta's Cash Remittance Automation, featuring AI-driven remittance parsing, automated bank-to-Plex invoice matching, and configurable rules for the messy real-world cases (chargebacks, overpayments, partial discounts). Live demos throughout, with Q&A on scoping and rollout in a Plex environment.	Nathan Morris
06/18/2026	09:00 AM	10:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/18/2026	09:00 AM	10:00 AM	A&O	MA&O Advanced	A ; O integration - Advanced functionality of Plex Automation and Orchestration in a lab environment	Ron Harrison
06/18/2026	09:00 AM	10:00 AM	Sales	Quoting in Plex	Not sure where to begin with quoting in Plex-or how to improve the process you already have? This session will walk through a practical roadmap for implementation, show how to use key Plex features to solve every day quoting challenges, and explore metrics that help teams improve quote speed, consistency, and customer responsiveness.	Kevin Poppe
06/18/2026	09:00 AM	10:00 AM	Platform	Plex Tips and Tricks	We are going to spend some time talking though various topics that can help you navigate your day to day activities in Plex and maybe even give you some ideas about starting some new projects. All topic discussions will be high level. You will have the opportunity to go into more detail with me 1 on 1 after the session and at any time in the days that follow.	Shannon Hadley



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*Date	*Time Start	*Time End	Tracks	*Session Title	Description	Speakers
06/18/2026	09:00 AM	10:45 AM	General Business	Private OpX - Transformation Corner	These OpX Transformation Corner Sessions are designed for independent coaching with individuals or corporate teams. We can review specific issues as well as explore any topics from ERP ROI, how to empower new PLEX users with immersive process integration for maximum adoption and coach mature PLEX users in optimizing for stronger business health, functional governance and achieving your strategic North Star objectives, etc...	John Howard
06/18/2026	10:00 AM	11:00 AM		Available for Duplicate Session 7*	Currently held for a Co-Pilot session to be led by Microsoft/Rockwell	
06/18/2026	10:00 AM	11:00 AM	General Business	Organizational Change Management	Organizational Change Management	Victoria Beltran
06/18/2026	10:00 AM	11:00 AM		Available for Duplicate Session 11		
06/18/2026	10:00 AM	11:00 AM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/18/2026	10:00 AM	11:00 AM	Platform ;Integration; AI	Agentic AI platform for Plex	Customer Success Story: launched a new Agentic AI platform for Plex. This platform allows for Plex users to build their own automations in Plex using natural language. Think of Process Flows but without needing any development experience.	Nathan Morris
06/18/2026	10:00 AM	11:00 AM	Sales	Turbo-Charging Quoting / Program M	Participants will learn how GRT8 Quote Express / Project Central has helped Plex customers to efficiently manage the opportunity to cash process, including managing quoting, prototype and production initiation processes. You will also learn how clients have eliminated redundancies, excel spreadsheets for estimating and quoting while being able to report on lost/ won business. Additionally, you will hear how seamlessly quote to order and prototyping / production initiation processes have been augmented.	Lorren Riggle
06/18/2026	10:00 AM	11:00 AM	Planning and Scheduling	Job Creation Methods in Plex	Learn how to use every job creation method in Plex. This workshop walks you through PRP, CJFO, Kanban, Demand Caster, Automated Jobs, and Job Sets, showing you when and how each method is used and how they work together to support efficient production planning and execution.	Angie Abarca
06/18/2026	11:00 AM	12:00 PM	Part engineering;Produc	Operation Types Deep Dive	Join this deep dive operation to understand the key differences in Plex production reporting. During this session we will review the functional differences between the Plex operation types; cell, standard production, simplified production, kanban, and audit container. Learn how these operation type differences effect job scheduling, production reporting, backflushing, labeling and more.	Stefanie Krause
06/18/2026	11:00 AM	12:00 PM	Costing	Job Actual Costing	Join Patti Nowak, owner of Control+M Solutions as she reviews the Job Actual Costing opportunities of Plex. Job Actual Costing enables the Plex Actual Costing engine to track actual costs (specific material and outside service costs), overhead and labor, but allows financial management at standard. In short, this gives you incredible detail without the financial statement impact. We'll talk about how it works, what it takes to configure it, troubleshooting issues and the need for discipline for all data entry in the system to be accurate. This is a great tool in Plex that many of our clients really like, and we're looking forward to showing it again.	Patti Nowak
06/18/2026	11:00 AM	12:00 PM	Networking	Networking Time	Schedule some time to meet with your sponsors, network, or just take a break	
06/18/2026	11:00 AM	12:00 PM	A&O	MA&O Basic	Ever wish your manufacturing systems would just talk to each other-without custom scripts, brittle integrations, or late-night troubleshooting? That 's exactly what Plex Automation ; Orchestration (A;O) is built to solve. In this fast-paced, hands-on session, we 'll show you how Plex A;O acts as the connective tissue between Plex MES, external systems, machines, and enterprise apps-making automation easier, repeatable, and scalable. We 'll start with a quick, practical overview of what A;O is, where it fits in a modern manufacturing architecture, and when (and why) to use it. Then we 'll jump straight into a guided lab, where you 'll build and run real orchestration flows-triggering events, moving data, and automating business logic without writing custom code. You 'll see first-hand how A;O helps manufacturers: Respond to production and quality events in real time Eliminate manual steps between systems Standardize integrations across sites Scale automation without adding complexity Whether you 're technical presales, a solution architect, or a hands-on consultant, you 'll walk away with clear positioning, practical use cases, and the confidence to demo and explain A;O and its value to your organization. Come curious. Leave confident.	Dan Mullins
06/18/2026	11:00 AM	12:00 PM	Platform	Customer Care Update	Discussion on communications with customer care, priorities, effective communication, what happens when cases go to Dev, etc	Jeff Bugayong; Matthew Browning
06/18/2026	11:00 AM	12:00 PM		Available for Duplicate Session 4	TBD	
06/18/2026	11:00 AM	12:00 PM	Integration	Integration Basics	This session will cover Plex Integration basics using methods like API 's, data sources, web services, and ODBC	Mike McCormick
06/18/2026	12:00 PM	01:00 PM	Networking	Lunch	Lunch	
06/18/2026	01:00 PM	02:00 PM	Keynote	Closing Session	Closing session, announcement of Plex-a-Palooza 2027 Venue and Dates!!!	Patti Nowak