



SUNGARD

EXP MACESS & EXP FORMWORKS SUMMIT

August 20-23, 2007
Sandestin Golf &
Beach Resort
Destin, FL

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To Our Customers...



For the last several years, our Users Conference has been held in conjunction with SunGard World. However, we are pleased to hold our Users Conference outside of the SunGard World format this year. We invite you to participate in this event, exclusively for EXP customers, and learn more about the product(s) you are using, get hands-on training, network with other system users and EXP staff, and have a great time at the beautiful Sandestin Golf & Beach Resort! We hope you will be able to join us in Sandestin this August 20-23.

We have gone through many exciting changes over the last 12 months. We recently released EXP FormWorks v5.0 and EXP MACESS v2.5, introducing significant improvements to these systems. A service bureau was added for data entry, allowing you to refocus your employees on customer facing and value-added transactions. Many customers have converted to EXP MACESS and EXP FormWorks, and several have implemented Process Director. We also welcomed many new clients. It has truly been an exciting year.

In 2006, SunGard EXP was positioned on Gartner's ECM Magic Quadrant. We are very excited to be recognized as a world-leader for end-to-end ECM solutions. We also partnered with MEDSEEK to offer you leading portal management technology.

At the conference, you will discover new uses for our products, learn about new product enhancements, hear best practices from other users and have the chance to participate in hands-on labs. We will also host a variety of roundtables to foster open discussion and solicit feedback on how we can further improve our products and services.

We look forward to seeing you at Sandestin.

Sincerely,

Jason Ingram
President

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Senior Vice President

Agenda at a Glance



Monday, August 20

9:00am - 5:00pm Registration
 2:00 - 5:00pm Hands On EXP FormWorks v5.0 for EXP MACCESS
 6:00pm Welcome Reception

Tuesday, August 21

7:30 - 11:30am Registration
 7:30 - 9:00am Breakfast
 9:00 - 9:30am Welcome & Agenda
 9:30 - 10:45am EXP MACCESS – What Have You Done for Me Lately & Future Features
 10:45 - 11:00am Morning Break
 11:00am - 12:00pm EXP FormWorks – What Have You Done for Me Lately & Future Features
 12:00 - 1:00pm Lunch
 1:00 - 2:00pm Panel Discussion – Best Practices from the Field
 2:00 - 3:00pm Afternoon Break
 3:00 - 5:00pm Hands on v5.0 for EXP FormWorks Customers
 3:00 - 4:00pm EXP MACCESS Metadata Migration
 4:00 - 5:00pm Are You Taking Advantage of What EXP MACCESS Has to Offer?
 6:00 - 9:00pm Reception

Wednesday, August 22

7:30 - 9:00am Breakfast
 9:00 - 10:15am BPM with Process Director Panel Discussion
 Hands On EXP MACCESS, Session 1

10:15 - 10:30am Morning Break
 10:30am - 12:00pm EXP FormWorks in the Real World
 Hands On EXP MACCESS, Session 2
 Lunch
 1:00 - 5:00pm Activities
 6:00 - 9:00pm Reception

Thursday, August 23

7:30 - 8:30am Breakfast
 8:30 - 9:30am Roundtable – Technical Services: Working with SQL Server & Your Network Environment
 Beyond the Enterprise – Exposing EXP MACCESS to Non-Traditional Users
 Hands On EXP FormWorks v5.0
 9:30 - 10:30am Roundtable – Claims
 Custom Reporting Using Crystal Reports & Microsoft SQL Server Reporting
 Advanced SysAd – Architecture & Troubleshooting
 Morning Break
 10:30 - 11:00am Roundtable – Customer Service
 11:00am - 12:00pm Conversion – MACCESS 2.0 to EXP MACCESS
 12:00 - 1:30pm Roundtable – Dental Claims
 Lunch & Dismissal

Sessions



Pre-Conference Training Session

Hands On EXP FormWorks v5.0 for EXP MACCESS Monday, August 20: 2:00 - 5:00pm

Come and learn the fundamentals of EXP FormWorks. This session is specifically designed for the individual who is not familiar with the EXP FormWorks System. This 3-hour, hands-on session will introduce you to the concepts and fundamentals of how the EXP FormWorks System processes documents. Follow a day in the life of a claim, while you take the driver's seat of the EXP FormWorks v5.0 System.

Regular Conference Sessions

Welcome & Agenda

Tuesday, August 21: 9:00 - 9:30am
 Please join us for a brief welcome. We will review the agenda, and highlight sessions and activities that you won't want to miss!

EXP MACCESS – What Have You Done for Me Lately & Future Features

Tuesday, August 21: 9:30 - 10:45am
 Learn what changes have been made to EXP MACCESS over the last year. In this session, you will see many of the latest EXP MACCESS features and

improvements designed to help your organization in a variety of ways. Topics will include improved Corro functionality, expanded Corro scripting, support for 64-bit SQL Server, improved Service Form functionality, Restricted Users and much more.

Get a sneak preview of coming attractions for EXP MACCESS. Because your feedback and new ideas are important to SunGard EXP for determining future product features and enhancements, there will be ample discussion time. Bring your list of desired functionality and discuss it with the architects and other customers.

EXP FormWorks – What Have You Done for Me Lately & Future Features

Tuesday, August 21: 11:00am - 12:00pm
 Join this structured discussion on what is happening in the world of document capture. We'll present some industry trends and how our latest R&D efforts are making your processing more accurate and efficient. We'll also ask for your input on new features that you would like to see added, so bring your ideas.

Panel Discussion – Best Practices from the Field Tuesday, August 21: 1:00 - 2:00pm

What other EXP MACCESS customers are using Workflow, Corro, Service Forms and Custom Reporting? This interactive session will give you ideas you can take home to drive new, more efficient business processes within your organization. You will be able to submit your questions in advance of the conference.

EXP MACCESS Metadata Migration Tuesday, August 21: 3:00 - 4:00pm

You spoke; we listened! The Metadata Migration module will soon be introduced allowing administratively configured data, such as queues, queue rules, Service Form Templates, etc., to be ported from one EXP MACCESS environment to another. This will allow you to easily replicate configuration data from your Test environment to your QA environment and finally to your Production environment. Get the details on how this module will work.



Hands On v5.0 for EXP FormWorks Customers
Tuesday, August 21: 3:00 - 5:00pm

Get behind the wheel of EXP FormWorks v5.0. This session will present the differences and advantages of EXP FormWorks v5.0 over previous versions. Plus, you will get hands-on examples of processing documents through a working system.

Are You Taking Advantage of What EXP MACESS Has to Offer?

Tuesday, August 21: 4:00 - 5:00pm
EXP MACESS offers many features to help make your life easier, but are you taking advantage of them? You may not be aware of everything we offer, so come see what you may have been missing!

BPM with Process Director Panel Discussion
Wednesday, August 22: 9:00 - 10:15am

Come learn how EXP MACESS customers have used Process Director within their organization. You will have the opportunity to ask questions and learn best practices.

Hands On EXP MACESS, Session 1
Wednesday, August 22: 9:00 - 10:15am

In this session, you'll have an opportunity to use the EXP MACESS System and learn how to easily and efficiently navigate your way through folders and documents. You'll also take a test drive of Corro and create several letters in order to see the options available to you. During this session, you'll get to use features in the Service Module, and we will point out some best practices for system design and future expansion. Don't come expecting a presentation; this is a hands-on lab!

EXP FormWorks in the Real World
Wednesday, August 22: 10:30am - 12:00pm

Ever wondered how other users capture forms? Ever wonder what ingenious ways you can integrate EXP FormWorks to gain more efficiency? This session will present some conventional and not-so-conventional configurations of EXP FormWorks used to reduce overall capture costs. Learn how EXP FormWorks customers implemented this system, the impact the implementation had on their business and ask all the questions you want.

Hands On EXP MACESS, Session 2
Wednesday, August 22: 10:30am - 12:00pm

Service Forms can be a very powerful data collection tool. During this session, you'll get your hands dirty and create some Service Forms using real-life business scenarios. Additionally, you'll get to use Workflow Examination to see how simple the end-user interface really is to use. You'll hear about best practices for designing, maintaining and expanding your system. If you're expecting a boring presentation, you'll be disappointed. You're going to get your hands on EXP MACESS!

Roundtable – Technical Services: Working with SQL Server & Your Network Environment

Thursday, August 23: 8:30 - 9:30am
What's really underneath the hood of EXP MACESS? Come join our experts, and other customers, for an open discussion on the technology behind the EXP MACESS solution. Overall architecture, deployment choices, performance considerations, replication, database maintenance, troubleshooting, and related tools and techniques are all topics to be discussed in this interactive presentation.

Beyond the Enterprise – Exposing EXP MACESS to Non-Traditional Users

Thursday, August 23: 8:30 - 9:30am
Providers, Members and Agents want to access your EXP MACESS data. You need to control what they can see and provide them access to the data they are authorized to work with. In this session, we'll discuss some real-world solutions already in place as well as diving into the decisions you'll face in opening up your system to non-traditional users.

Hands On EXP FormWorks v5.0
Thursday, August 23: 8:30 - 9:30am

Get your hands on EXP FormWorks v5.0. The demo system will be running and SunGard EXP staff will be available to guide you through the process and answer your questions. Take this opportunity to follow-up on any questions generated during the conference or to check out interesting EXP FormWorks features.

Roundtable – Claims
Thursday, August 23: 9:30 - 10:30am

Join our experts, and other customers, for an open discussion of how claims processing and workflow are performed using SunGard EXP solutions. This session will highlight customer best practices as

well as provide a forum for discussion on how SunGard EXP products can be improved.

Custom Reporting Using Crystal Reports and Microsoft SQL Server Reporting

Thursday, August 23: 9:30 - 10:30am
EXP MACESS users have a variety of options and goals related to customized reporting. With the release of SQL Server 2005 many customers are showing interest in the new reporting tools offered by Microsoft. This session will focus on the capabilities of SSRS, and a comparison between the features of Crystal Reports and SSRS. The goal of this session will be to introduce customers to the differences in features in the two reporting applications, and to aid in decision making as to which product may best suit their needs.

Advanced SysAd – Architecture & Troubleshooting
Thursday, August 23: 9:30 - 10:30am

With increasing technology at work in your systems comes a need for an increased understanding of what is really happening behind the curtains. In this session, we will highlight the architecture of the EXP MACESS System and develop some basic knowledge of how the client, middleware

and database work with each other. And you don't have to be a technical expert to benefit from this session!

For those who are already working with EXP MACESS, you will be better able to maintain and troubleshoot communication problems with the knowledge gained in this session. For those who are planning a move to the EXP MACESS System in the future, you will be better prepared for the network and equipment discussions that will eventually be had. Learn how to diagnose some basic issues using built-in tools as well as other techniques for troubleshooting.

Roundtable – Customer Service
Thursday, August 23: 11:00am - 12:00pm

Come join our experts and other customers for an open discussion of how customer service is performed using SunGard EXP solutions. This session will highlight best practices between customers, as well as provide a forum for discussion on how SunGard EXP products can be enhanced to meet your customer service needs in the future.



Activities & Events



Conversion – MACESS 2.0 to EXP MACESS

Thursday, August 23: 11:00am - 12:00pm

Customers who are interested in upgrading from MACESS 2.0 (I-MAX) to EXP MACESS are encouraged to attend this session. We will describe the programs and processes available to convert and upgrade your systems. You'll learn about the challenges involved with conversion, along with the processes put into place to make your conversion a smooth experience. Join us to learn conversion best practices and share your experiences and concerns.

Roundtable – Dental Claims

Thursday, August 23: 11:00am - 12:00pm

Come join our experts and other customers for an open discussion of how dental claims processing can best be performed using SunGard EXP solutions. This session will highlight customer best practices as well as provide a forum for discussion on how SunGard EXP products can be enhanced to meet your dental claims needs in the future.

Activities

On Wednesday afternoon, we invite you to participate in one of several networking activities that allow you to take advantage of Sandestin's fun side. One activity is included in the standard conference registration fee. Guests are welcome to join at an additional cost.

Deep-Sea Fishing

Climb aboard for a 4-hour deep-sea fishing excursion into the Gulf of Mexico. Grouper, snapper and amberjack are just some of the fish we will be luring. The catch of the day will be the featured menu item for dinner! Drinks and snacks will be provided on the boats. (Guest fee: \$150)

Afternoon Cooking Class & High Tea

Join us at Gerard's for a cooking class where you will learn how to prepare a multi-course meal. You will get to enjoy the fare and a glass of wine. After the class, we will go next door to Magnolia & Ivy, dress up in hats and gloves and enjoy high tea. (Guest fee: \$125)

Pottery Painting & Silver Jewelry Making

Let the Van Gogh in you loose. Paint & Place has a great assortment of coffee mugs, vases, bowls, platters and many other items for you to paint any way you desire. You will be able to select an item to paint and the item will be fired and ready for you on Thursday. After painting, you'll design a piece of silver jewelry with a gem stone of your choice. (Guest fee: \$115)

Beach

Just want to kick back and soak up the sun? Join a group of beach-goers and just sit on the sand and splash in the waves. (Guest fee: none)

Evening Events

Monday, August 20 – Finz Restaurant

Get ready for a Paradise Island feast! Finz is Sandestin's signature beachfront restaurant with beautiful views of the sugar-white sand and the emerald seas of the Gulf Coast. Island attire is encouraged.

Tuesday, August 21 – Dinner

Be prepared for an exciting surprise evening adventure including dinner, drinks and entertainment. Casual attire is appropriate. Ladies, please do not wear spiked heels.

Wednesday, August 22 – SunGard EXP Block Party

After an afternoon of activities, we will join back up on the Grand Lawn for dinner. The menu will feature the "catch of the day" from the afternoon deep-sea fishing excursion.



Logistics



Registration

Register online at www.sungard.com/expsummit.

Inquiries

For registration inquiries, please contact Trisha Gilbert, the event manager, at 205-408-3502 or trisha.gilbert@sungard.com; or contact your account manager.

Conference Fees

Early Bird Registration - \$795 before July 9, 2007
Regular Registration - \$995 after July 9, 2007

SunGard EXP cannot accept credit card payments at this time. You will be invoiced when your registration is complete.

Who Should Attend

All EXP MACESS and EXP FormWorks users, managers, administrators and executives are encouraged to attend.

Cancellation Policy

Cancellations of conference registrations will be accepted and fees will be fully refunded until July 20, 2007. From July 21-August 10, a 50% refund will be

given. On or after August 11, no refunds will be given. Substitutions are permitted at anytime at no cost.

Guest Information

Guests are welcome to attend, however conference sessions are reserved for paid conference registrants. Guest fees will cover meals. If your guest will not be dining with us or participating in activities, no fees will be charged. Guest passes for meals and activities can be purchased as part of the online conference registration.

Guest fees

Meals: \$495 (3 breakfasts, lunches and dinners)

Activities:

Deep-sea fishing: \$150

Cooking class & afternoon tea: \$125

Pottery painting & silver jewelry making: \$115

Beach: \$0

Hotel

Please call the hotel directly at 800-320-8115 to make your reservations. Remember to reference SunGard EXP when making hotel reservations to receive the group rate of \$175 per night. We

recommend making hotel arrangements before July 10, 2007 to ensure availability.

All rooms have a small fridge, toaster, microwave, coffee maker and complimentary coffee.

Sandestin Golf & Beach Resort
9300 Emerald Coast Parkway West
Destin, FL 32550
1-800-320-8115

Weather

Average High 91°

Average Low 71°

Rainfall 6.91"

Water Temperature 84°

Getting There

Airline Reservations

You will be responsible for making your own flight arrangement to one of the following airports (distances from Sandestin Golf & Beach Resort are noted):

Destin Airport (DTS) – 8 miles

Okaloosa Regional Airport (VPS) – 30 minutes

Panama City-Bay County International Airport (PFN) – 40 miles

Pensacola Regional Airport (PNS) – 65 miles

Please visit www.sandestin.com for carriers and additional information regarding air travel to the resort.

As you make your travel arrangements, please note the Welcome Reception will commence at 6:00pm on Monday, August 20. The Summit will conclude after lunch on Thursday, August 23. If you are planning to attend the EXP FormWorks training session, please keep in mind that the session begins at 2:00pm on Monday, August 20.

Ground Transportation

You may choose to rent a car or use the following service to arrive at the Sandestin Golf & Beach Resort from any of the area airports. Sandestin recommends MARQUEE Limousines, Inc., for ground transportation. You can pre-arrange ground transportation by calling them at 877-650-6277 or 850-269-2700.

Rates from Destin Airport:

Escalade Service (1-6 passengers): \$65

Limousine Service (1-6 passengers): \$95

Limousine Service (7-12 passengers): \$125

Rates from Okaloosa Regional Airport:

Escalade Service (1-6 passengers): \$75

Limousine Service (1-6 passengers): \$125

Limousine Service (7-12 passengers): \$150

Rates from Panama City Airport:

Escalade Service (1-6 passengers): \$125

Limousine Service (1-6 passengers): \$150

Limousine Service (7-12 passengers): \$195

Rates from Pensacola Airport:

Escalade Service (1-6 passengers): \$150

Limousine Service (1-6 passengers): \$195

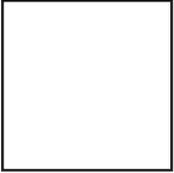
Limousine Service (7-12 passengers): \$250

SUNGARD EXP

104 Inverness Center Place
Birmingham, AL 35242

Return Service Requested

www.sungard.com/expsummit



Mailing Address Here