Sage ERP MAS 90 and 200 Roadmap

September 2011

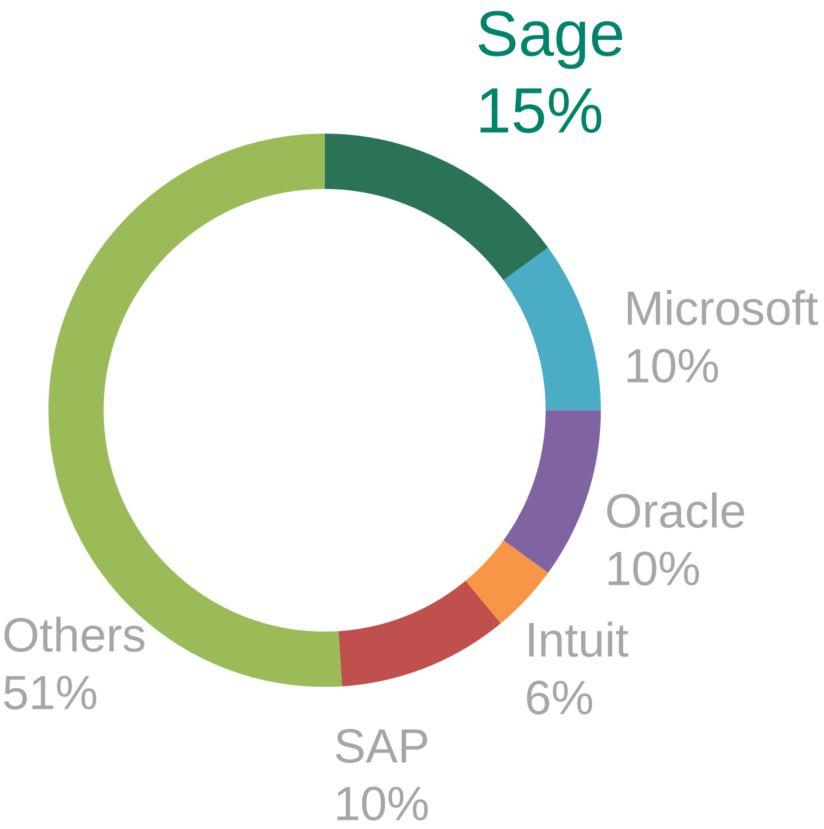
This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction.

The information is ***subject to change*** *at any time without notice.*

As Sage develops products using an Agile development methodology, any one of the milestones, features, release periods or versions could change. None of the information should be interpreted as a commitment on the part of Sage.

Sage is #1 Worldwide*

- A global publicly traded company
- Over 13,000 employees
- Over 6 million customers
- Over 25 years of experience



Source: *IDC #220937, Worldwide ERP 2008 Vendor Analysis, published December 2009. Based on ERP revenue small business; <1000 employees

Sage Overview

Market	Finances	Customers
Global company with over 13,400 employees	Revenue of $2.24B for FY2010	Provide advice to customers through 1.7 million support contracts
6.3 million customers worldwide	Market capitalization of approximately $4.3 billion	Manage around 40,000 customer calls each day
One of the market leaders in the UK, North America, Europe, South Africa and Asia	Made over 40 acquisitions since 1991	Work with over 27,000 reseller partners and over 40,000 accountants worldwide

Sage ERP MAS 90 and 200

Serving over **45,000** customers

- Sage ERP strategic product
- Fully integrated business management solution
- Superior architecture that grows with your business
- Collaborative ecosystem of development partners, authorized resellers, consultants and CPAs
- Deployment options for on-premise or on-demand (cloud)

Sage ERP MAS 90 and 200 Roadmap

Version 4.5
Q4 2011
- SageCRM v7.1 integration
- Free SageCRM license
- Migration to MS SQL database
- 14 Extended Solution titles

Online
Q4 2011
- Cloud deployment option
- Hosted by Sage

Version 5.0
Q4 2012
- SData Web Services
- Sage Web Toolkit
- Sage Exchange
- Auto-update
- SageCRM workflows
- Mobile Reports

2011 2012 2013

Intelligence
Q4 2011

- Reporting Trees
- Report distribution
- Performance
- FRx conversion assistant utility

SageCRM 7.1
Q4 2011
- eMarketing
- Total campaign management
- MS Exchange integration
- Interactive dashboard
- iPhone App
- Twitter integration

Version 5.1
Q42013
- Mobile Apps
- Sage Portal
- Sage Advisor
- Sage Payroll

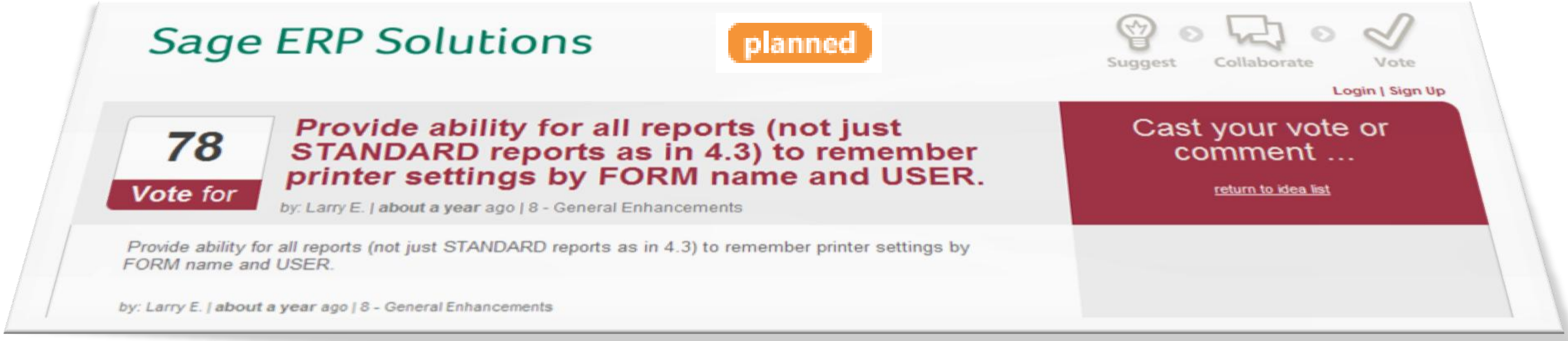
Sage ERP MAS 90 and 200 4.4 Product Update 6

Now Available!

Now Available: Product Update 6

Released July 2011

- Printer information saved by workstation
  - By popular request from www.sagemas.com/MAS_90_200_feedback
  - Printer information now saved by workstation and form code or report setting



Sage ERP

Sage Connected Services

On Demand Solutions

sage

Sage Connected Services

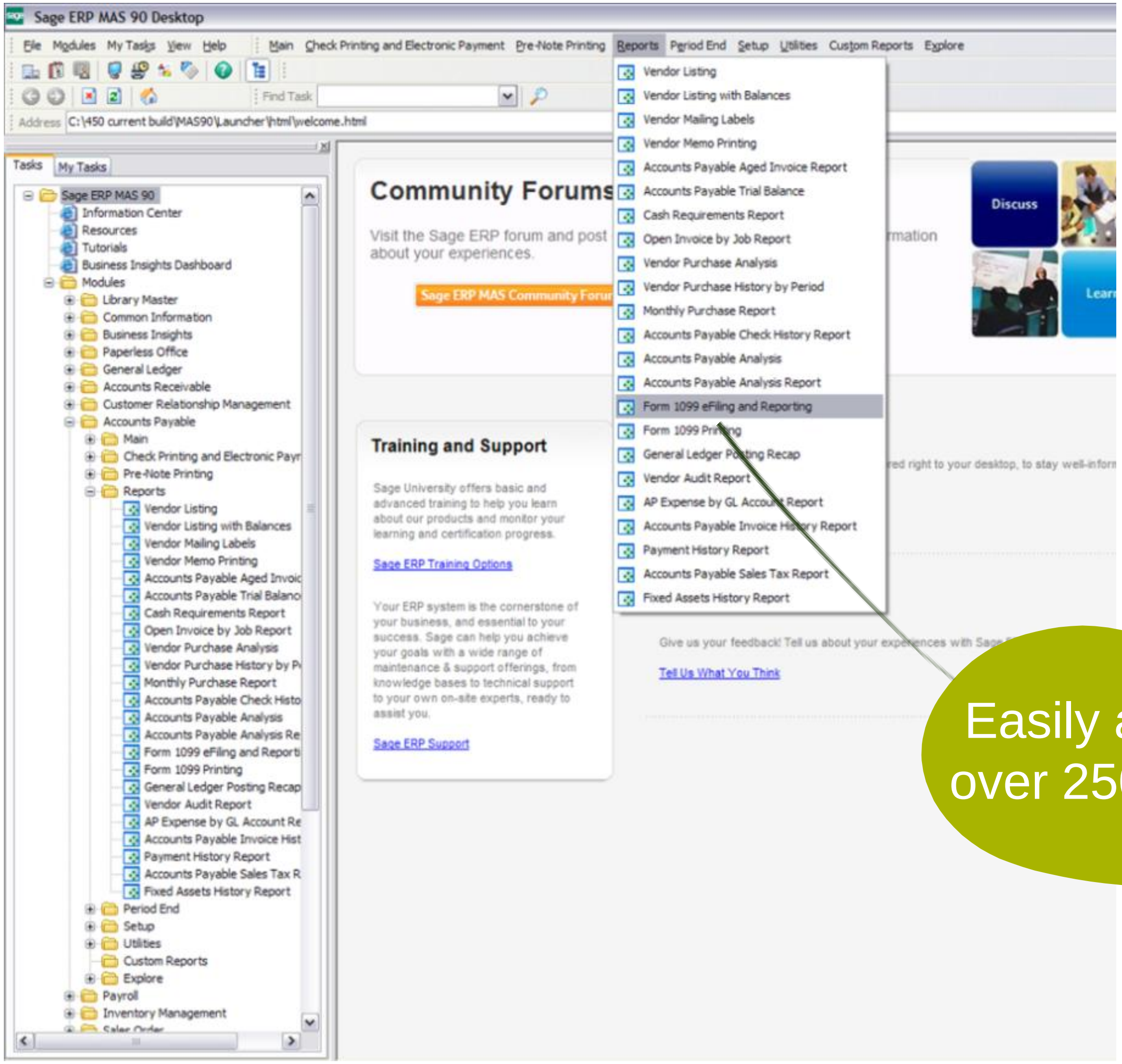
- Sage offers a number of connected services to help optimize your business
  - Federal and State e-Filing and Reporting, powered by Aatrix
  - Sage Sales Tax, powered by Avalara
  - Credit Card Processing, powered by Sage Payment Solutions
  - Sage eMarketing, powered by Swiftpage
  - Business credit monitoring services, powered by Experian

Federal and State eFiling and Reporting

- Streamline your tax reporting processes
  - Integrated with Sage ERP MAS 90 or 200
  - Populates forms with your employee and vendor data
- Option to eFile or print and mail
  - Eliminates manual form creation and saves time
  - Choose from over 250 federal and state e-forms for Unemployment, Withholding, New Hire reports, W-2s, W-3s, and 1099s
  - Complete your W-2/1099 eFiling in one step for less than $2/employee

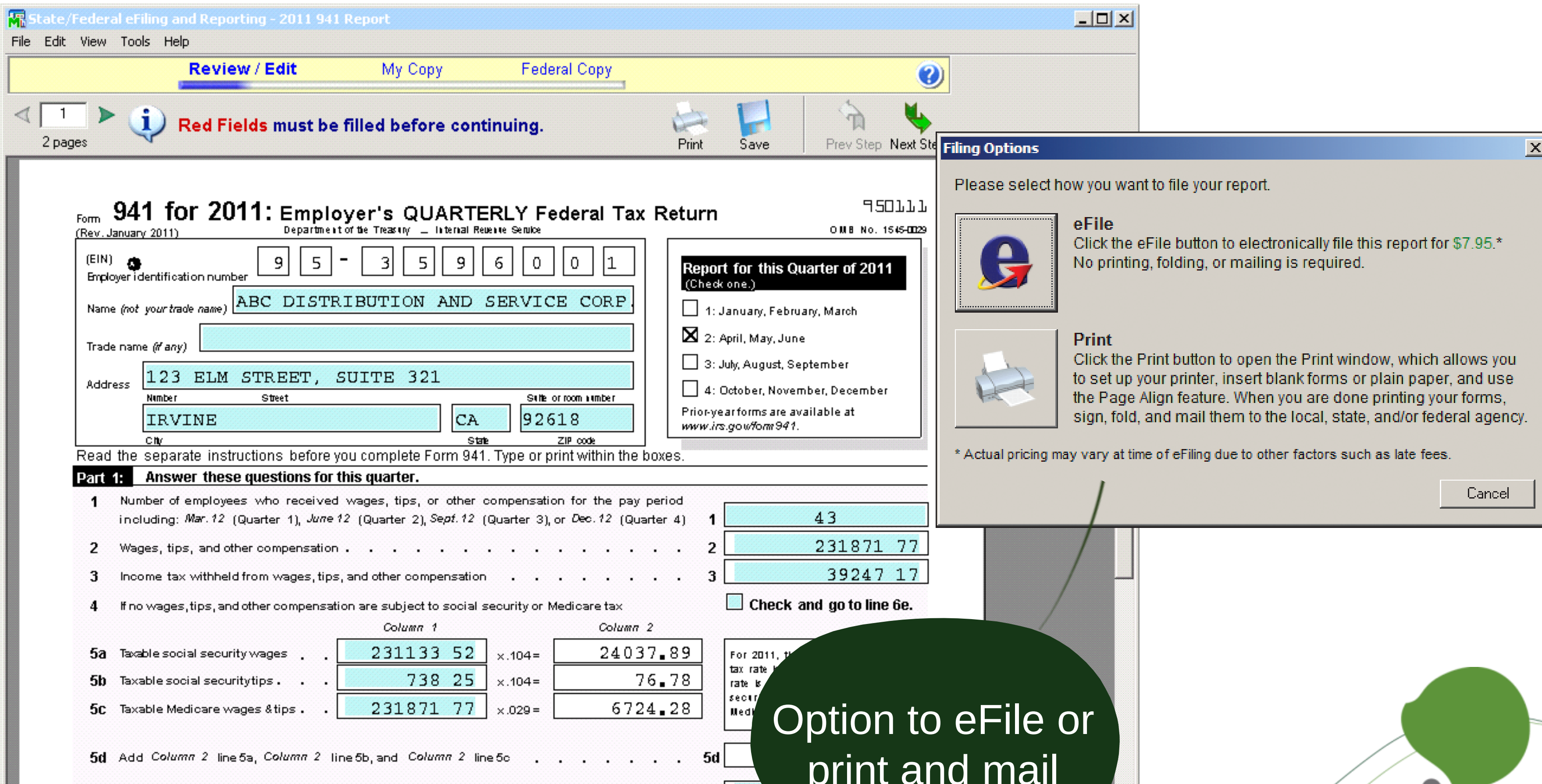
A Sage Connected Service

Federal and State eFiling and Reporting



Easily access over 250 forms

Federal and State eFiling and Reporting



Option to eFile or print and mail

Sign up at
https://sagemas.aatrix.com

Brochure
http://www.sagemas.com/assets/SageMAS/pdf/MAS_90_200_TaxReporting.pdf

Sage Sales Tax, powered by Avalara

- Makes paying sales tax simple for any business
- Automatically performs address validation, sales tax jurisdiction research, and rate calculation
  - Seamlessly integrated with Sage ERP MAS 90 and 200
  - Covers all sales tax jurisdictions in US and Canada
- Protect yourself from the risk of an audit
- Eliminate the need to research and maintain sales tax codes or schedules
- Set best practices in sales tax compliance
- Get back to focusing on revenue-generating activities!

A Sage Connected Service

Sage Sales Tax

A Sage Connected Service

- Auto-Address
  - Decrease data entry time and reduce shipping rates with the best source of address data in the country
- Auto-Jurisdiction
  - Auto-Jurisdiction returns correct jurisdiction and sales tax rate for each transaction
- Statutory Requirements
  - Reduce audit risk and ensure that you are charging the correct amounts, 13,000+ jurisdictions and counting
- Reporting
  - Access all data securely online with ease
  - Consolidate data on multiple companies
- Returns
  - Automate the entire returns process and collect sales tax information from various internal and external sources

Learn more at
http://www.avalara.com/Sage

AvaTax™

Overview video
http://www.avalara.com/Media/Flash/MAS90andMAS200/WalkThroughMAS.swf

Online demo
http://www.avalara.com/Media/Flash/MAS90andMAS200/index.html

Credit Card Processing powered by Sage Payment Solutions

- Automatically connects to Merchant Accounts for credit card authorizations and settlements
- Complete, secure, 24/7 online transaction reporting
  - Compliant with Visa and MasterCard Payment Card Industry (PCI) data security standard
  - Stored credit card numbers are encrypted
  - Credit Verification Version 2 (CVV2) to help verify card authenticity
  - Multiple address verification options add an additional layer of credit card authentication

Get Your Sage Merchant Account Now!

- Engage a Sage Connected Services Specialist
  - Call 1-877-541-1681 ext. 340123, or
  - Email your contact information to MASConnectedServices@sage.com
- Call your Sage Business Partner to order the Module

Free Credit Card Processing module with a Sage Payments account

Learn more at
www.sagemas.com/demo

Sage Payment Solutions

Credit Card Processing Module
www.sagemas.com/creditcardprocessing

Sage University

Anytime learning course
http://sageu.com/mas90

PCI Compliance Information
www.sagemasinfo.com/M90PCI

Sage eMarketing for SageCRM

A Sage Connected Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- Low monthly subscription fee

Available with Version 4.5 and SageCRM 7.1

Sage SmartBusinessReports

A Sage Connected Service

- Powered by Experian offers you
  - Easy to read business credit reports on your company, or on your customers
  - Business credit monitoring and alerts
- Access business credit reports at
  - http://www.smartbusinessreports.com/?link=1241

Sage ERP

Sage ERP MAS 90 Online

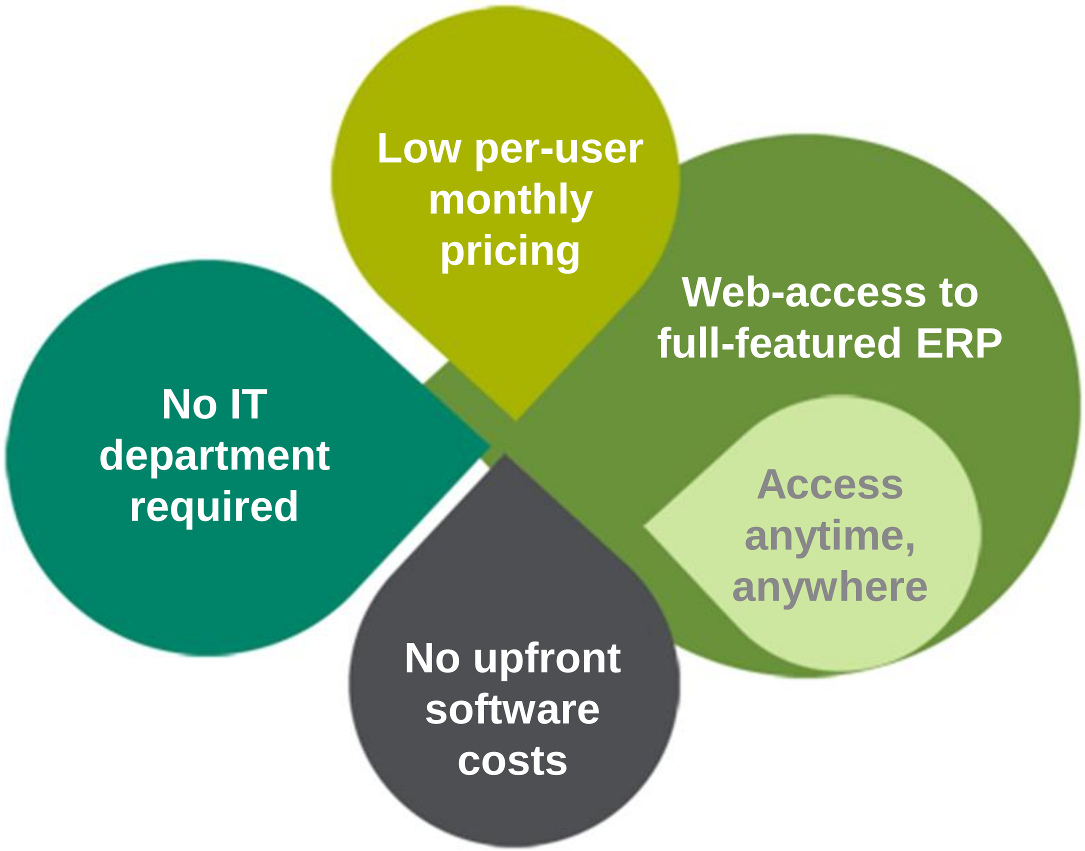
Cloud Deployment Option

sage

Sage ERP MAS 90 Online

Launching
Q4 2011

- Cloud deployment hosted by Sage
- Deployment option for customers with
  - Short implementation timeframe
  - Limited IT staff or budget
- Seamless migration to on-premise when your business grows



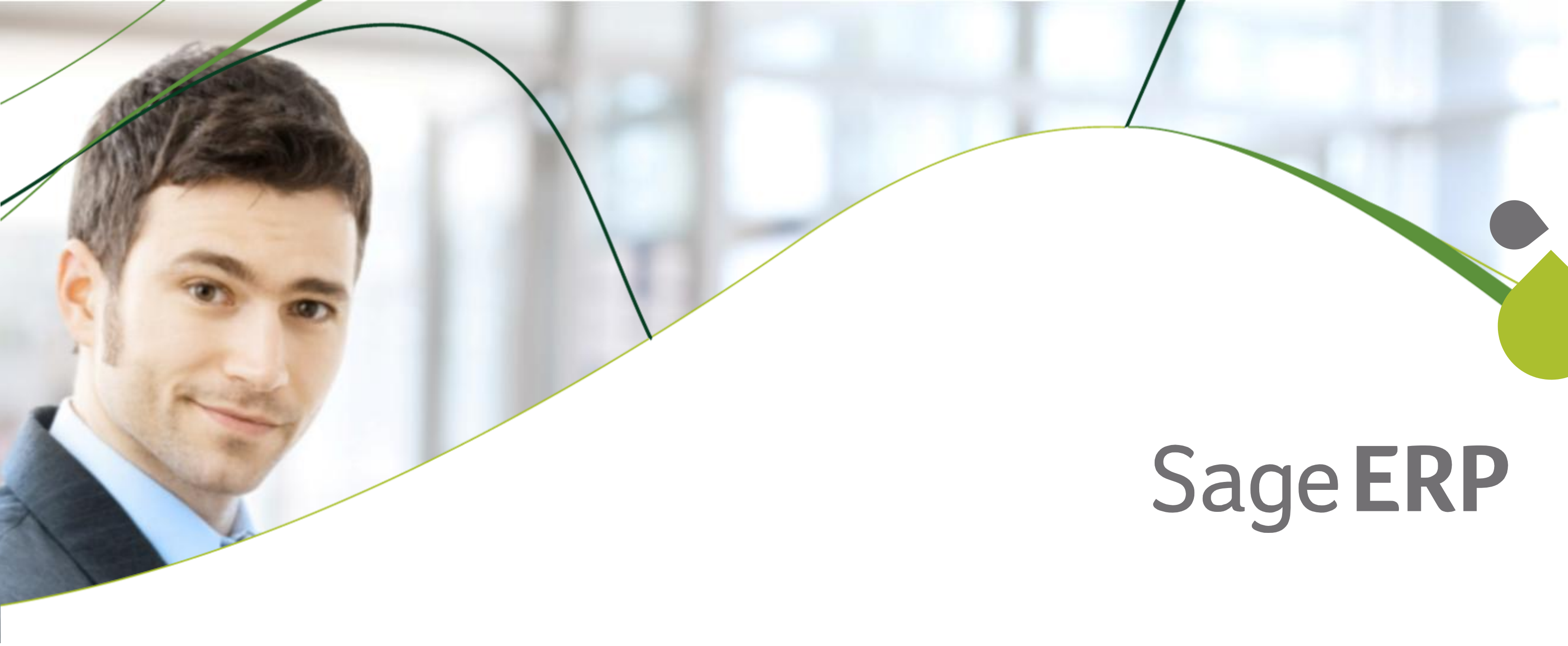
Sage ERP MAS 90 Online

- Available modules and options
  - System Setup
  - Library Master
  - General Ledger
  - Accounts Payable
  - Account Receivable
  - Inventory Management
  - Sales Order
  - Purchase Order
  - Bill of Materials
  - Bank Reconciliation
  - RMA
  - Electronic Reporting (1099)

Hosting Infrastructure

- 99.874% recorded uptime for 2010
- Hosting facilities operated by QTS Atlanta Metro Data Center
  - 2nd largest data center in the world
  - 990,000 square feet in total enclosed space
  - On-site Georgia Power substation and direct fiber access
- SAS-70 Type II compliant

Learn more at
http://www.qualitytech.com/facilities/atlanta-ga.jsp



Sage ERP

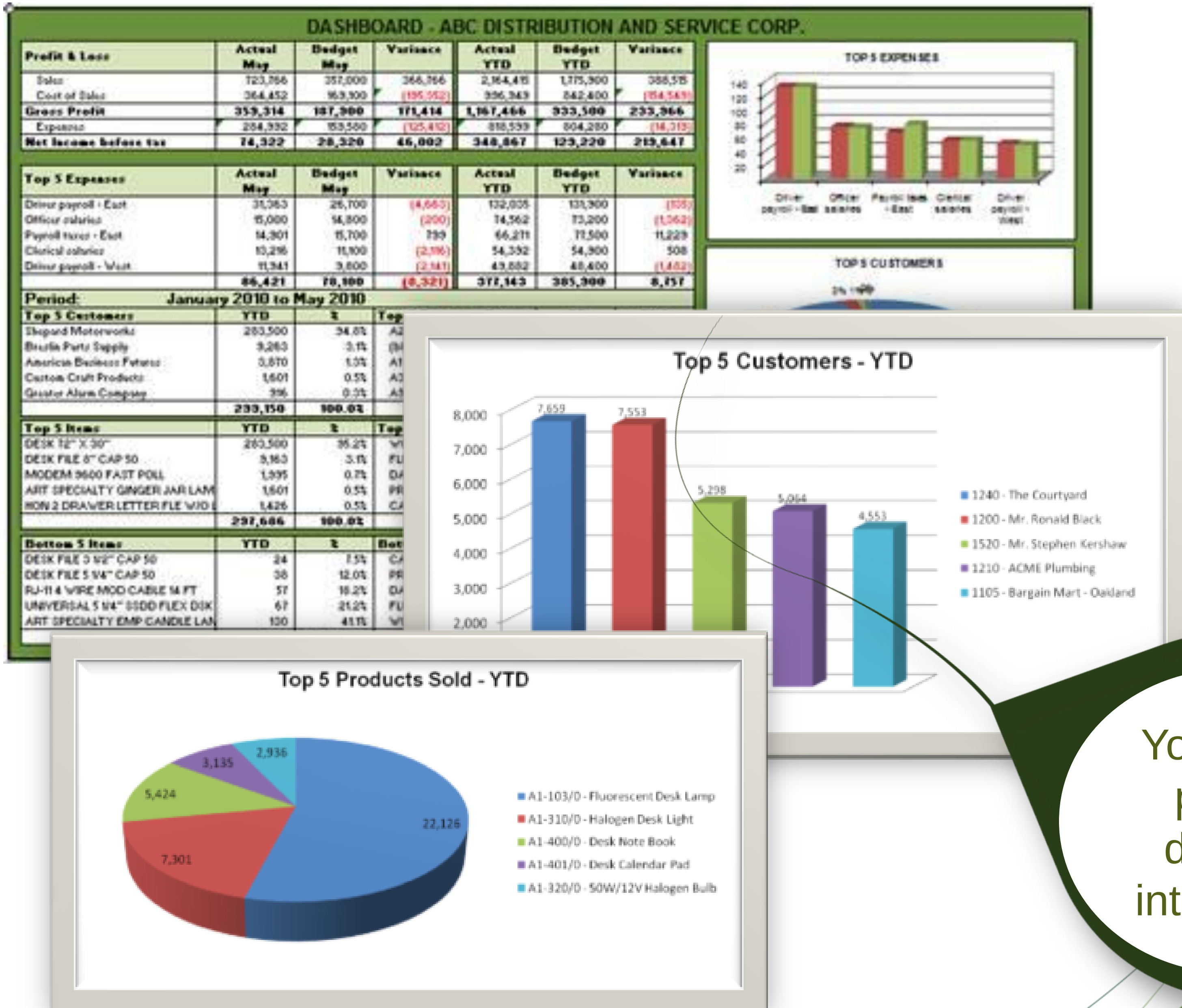
Sage ERP MAS Intelligence

Complex reporting made easy

sage

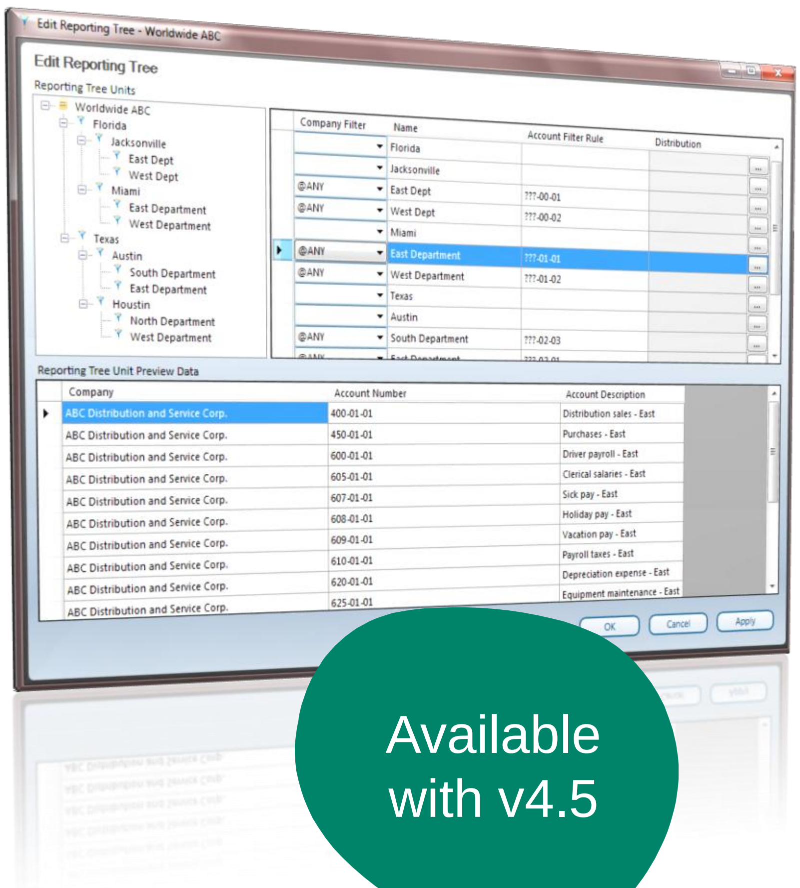
Sage ERP MAS Intelligence

- Complex reporting made easy
  - Business Intelligence in a familiar Microsoft Excel interface
  - Easily customizable "out of the box" financial, sales, purchasing, and inventory report templates and dashboards
- Predefined financial and operations reports for management, sales, purchases and inventory
- Access to all modules and data (not just GL!)
- Dashboard and trend analysis reports
- Consolidation of multiple companies and databases
- User-level security



Your data pulled directly into **Excel**

Intelligence – What's New



Available with v4.5

- Reporting Trees
  - Easy to learn organizational reporting
- Performance improvements
  - GL data loading up to 6x faster
  - General report loading 2x faster
  - Aggregated financials available
- Report distribution
  - Easy setup to fully automate report distribution
  - Rich text email distribution
  - Conditional distribution based on report content
  - Multi-format (PDF, XLS, HTML) file publishing to local and networked locations
- Create convenient Windows shortcut for any report
- Multi-company consolidations

FRx Conversion Assistant Utility

Coming Soon!

- Utility to assist converting FRx files to Intelligence files
- The utility will
  - Convert native columns like Actual/Budget columns
  - Convert calculated columns that involve basic arithmetic
    - Proprietary FRx formulas will not be converted
  - Map limited row formats to Report Designer row structure
    - Due to limited correlation between FRx and Intelligence row formatting, manual rework will likely be required post-conversion
  - Convert Reporting Trees to the reporting tree structure implemented in the Report Designer (for v4.5 only)
  - Convert Catalogs to layouts in the Report Designer if the Catalog's column layout and the row format can both be converted

Learn more at http://www.sagemas.com/intelligence

Sage University

Free anytime learning course
http://www.sageu.com/mas90

YouTube

The Sage ERP Learning Channel
www.youtube.com/user/SageUERPLearning

Sage ERP MAS 90 and 200 Version 4.5

Available Now!

Version 4.5 – What's New

Sage ERP MAS 90 and 200 V4.5

- 50 Enhancements and Extended Solutions Integrated
- Microsoft SQL Server Database Option
- SageCRM v7.1
- Free SageCRM Server and User License

Version 4.5 – Enhancements and Extended Solution Integrations

- 36 Enhancements delivered in Product Updates 1 through 5 are incorporated in v4.5, including the main features and functionality of 18 Extended Solutions titles
- The main features and functionality of 14 additional Extended Solutions titles are incorporated in v4.5 with enhancements to
  - Payroll
  - Sales Order and Purchase Order
  - Accounts Receivable

Version 4.5 – Enhancements

- 18 enhancements delivered in Product Updates 1 through 5 are incorporated in 4.5

General

- Enhanced credit card security
- Enhanced searching ability in data file display and maintenance
- Product update pre-installation scan feature
- Office 2010 support
- 941 Form 2011 update

Bank Rec

- Enforce tighter controls over bank reconciliation adjusting entries
- Enter checks, deposits, and adjustments on-the-fly
- Conveniently use recalculate outstanding entries totals utility
- Positive pay export wizard
- Expanded comment field
- Post to general ledger
- Check, deposit and adjustment entry and reconcile bank
- Transaction register task
- Security events for bank reconciliation
- Paperless office options for bank reconciliation

Accounts Payable

- Record wire transfers

Sales Orders

- Print back ordered information on picking sheets
- Avoid duplicate picking sheet printing

Version 4.5 – Extended Solution Integrations

- The main features and functionality of 18 Extended Solutions titles delivered in Product Updates 1 through 5 are incorporated in 4.5

Accounts Payable	Accounts Receivable	Bank Rec	Job Cost	Sales Order	Inventory Management	Payroll	Library Master
• AP-1043 - Distribution table for invoice entry • AP-1063 - ACH electronic payment for accounts payable • AP- 1077 - Additional check printing sort option • AP -1095 - Paperless office: AP checks & direct deposit stubs • AP-1101 - Multiple company aged invoice report	• AR-1027 - Enhanced invoice history search • AR-1200 - Cash receipts entry by invoice number	• BR-1004 - 'Positive pay' export • BR-1005 - Bank reconciliation import	• JC-1046 - Job status posting control	• SO-1035 - Enhanced quick print • SO-1096 - Enhanced customer PO number validation • SO-1271 - Authorized purchase control by customer or state	• IM-1111 - Security for inventory inquiry • IM-1119 - 'Physical count' entry by ticket number • IM-1244 - 'Inactive' item designation	• PR-1018 - Automatic earnings code maintenance by employee	• LM-1028 - Background color by company code

Version 4.5 – Additional Extended Solution Integrations

- The main features and functionality of 14 additional Extended Solutions titles will be incorporated in 4.5

Payroll

- PR-1067 - Additional deduction calculation methods
- PR-1116 - Deduction recalculation in payroll entry
- PR-1015 - Deduction calculation based on earnings type
- PR-1031 - Payroll data entry import utility
- PR-1091 - Enhanced benefit accrual

Sales Order and Purchase Order

- SO-1489 - Auto generate purchase orders from sales order entry
- PO-1020 - Purchase orders created from sales orders
- SO-1005 - Price level by customer/product line
- SO-1173 - Item pricing by total quantity
- SO-1530 - Enhanced sales order integration with job cost
- SO-1175 - Lot/serial distribution entry from sales order
- SO-1417 - Maintain split commissions by customer
- SO-1354 - Commission rate table by salesperson/customer/item

Accounts Receivable

- AR-1068 - Customers with national accounts

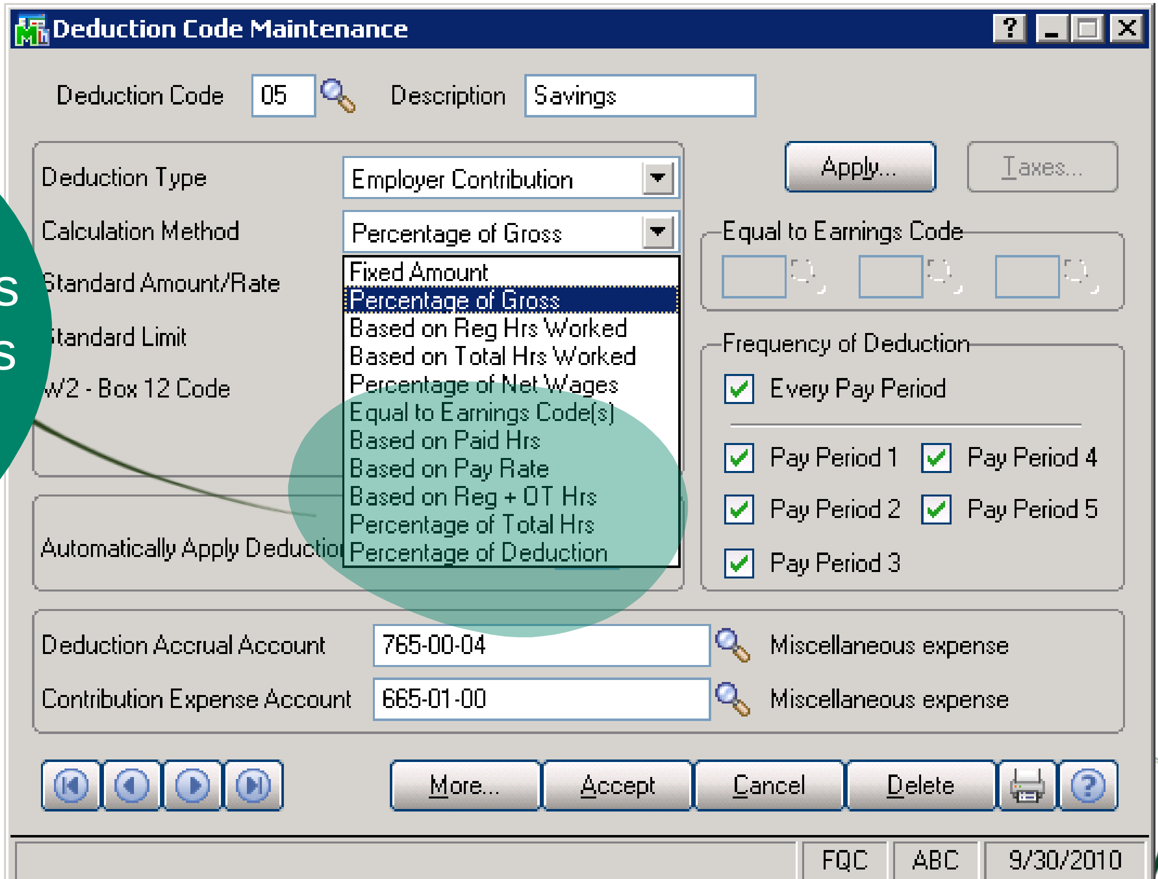
Version 4.5 – Payroll Enhancements

- Additional deduction calculation methods – similar to PR-1067
- Deduction recalculation in payroll entry – similar to PR-1116
- Deduction calculation based on earnings type – similar to PR-1015
- Payroll data entry importing – similar to PR-1031
- Enhanced benefit accrual – similar to parts of PR-1091

Version 4.5 – Payroll Enhancements

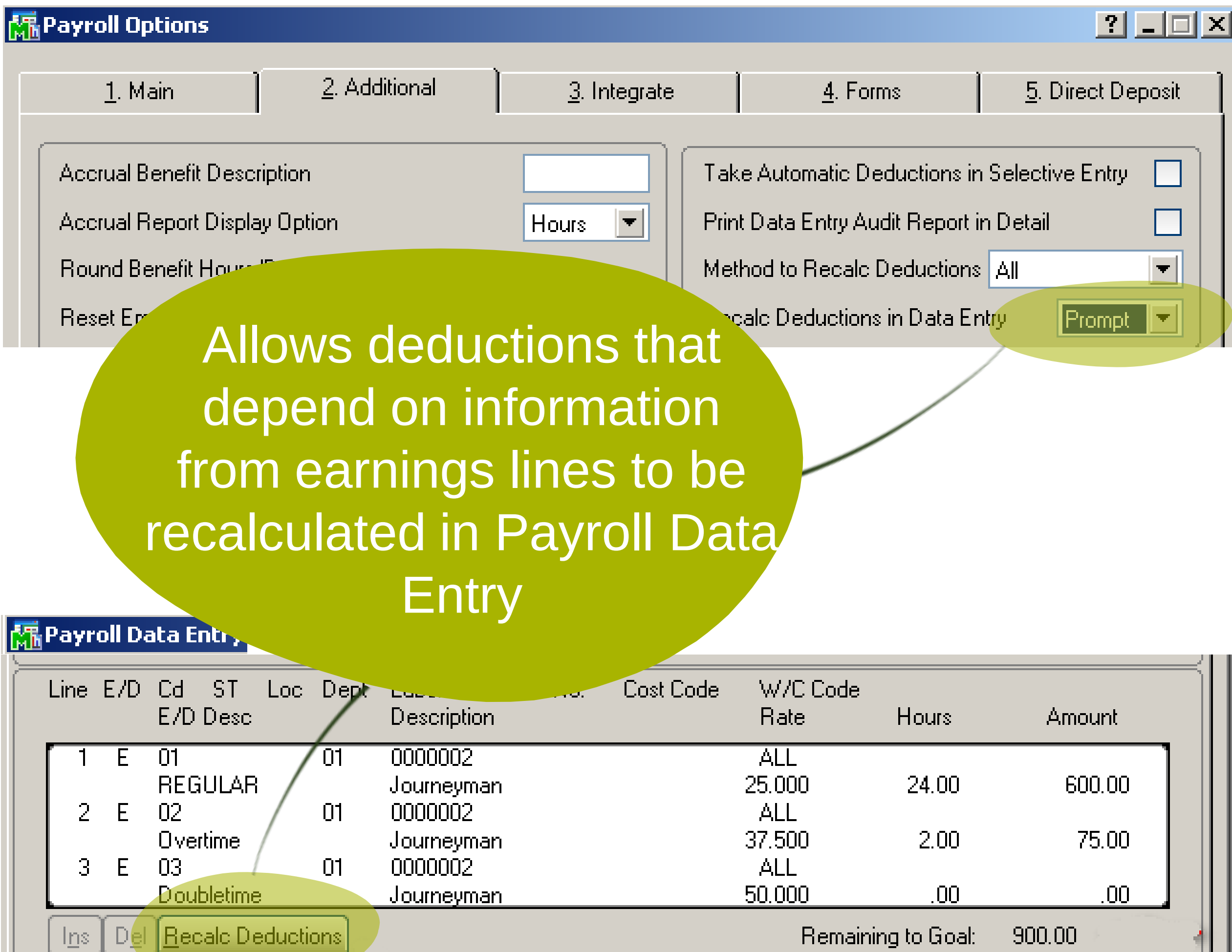
- Additional deduction calculation methods

Paid Hours
Pay Rate
Regular + Overtime Hours
Percentage of Total Hours
Percentage of Deduction Method



Version 4.5 – Payroll Enhancements

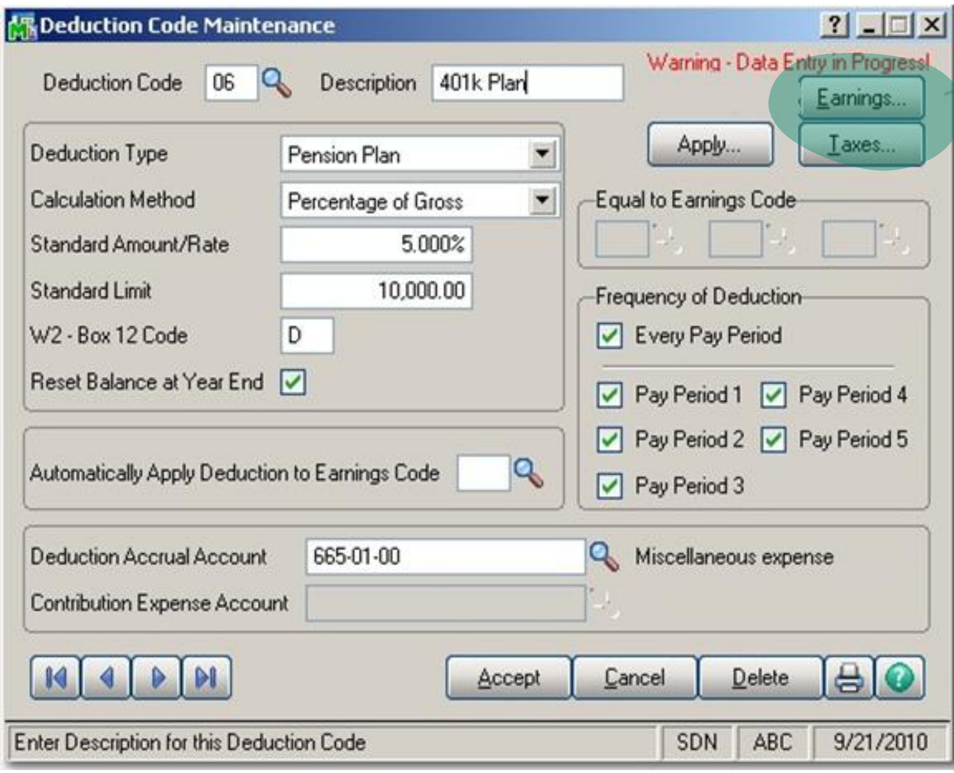
- Deduction recalculation in payroll entry



Allows deductions that depend on information from earnings lines to be recalculated in Payroll Data Entry

Version 4.5 – Payroll Enhancements

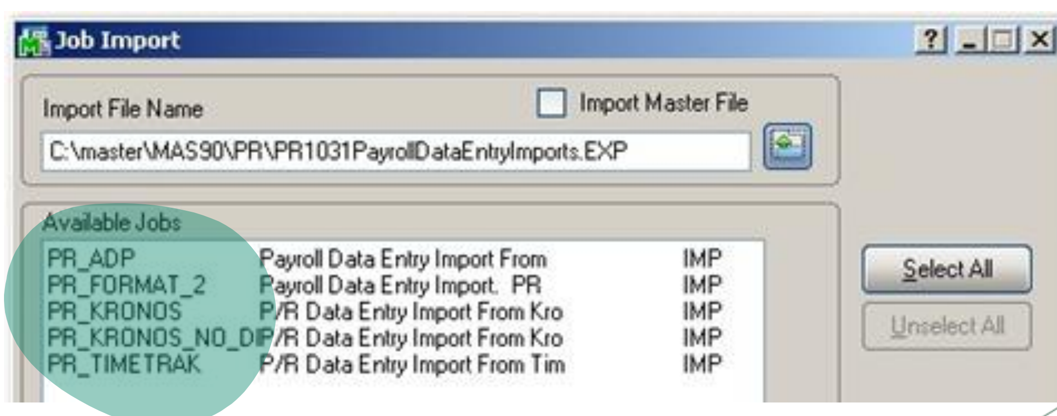
- Deduction calculation based on earnings type allows you to use payroll deduction codes according to a specified earnings type in order to calculate based on “Percent of Gross” or “Total Hours Worked”.



Select a specific earnings type to be used for calculations

Version 4.5 – Payroll Enhancements

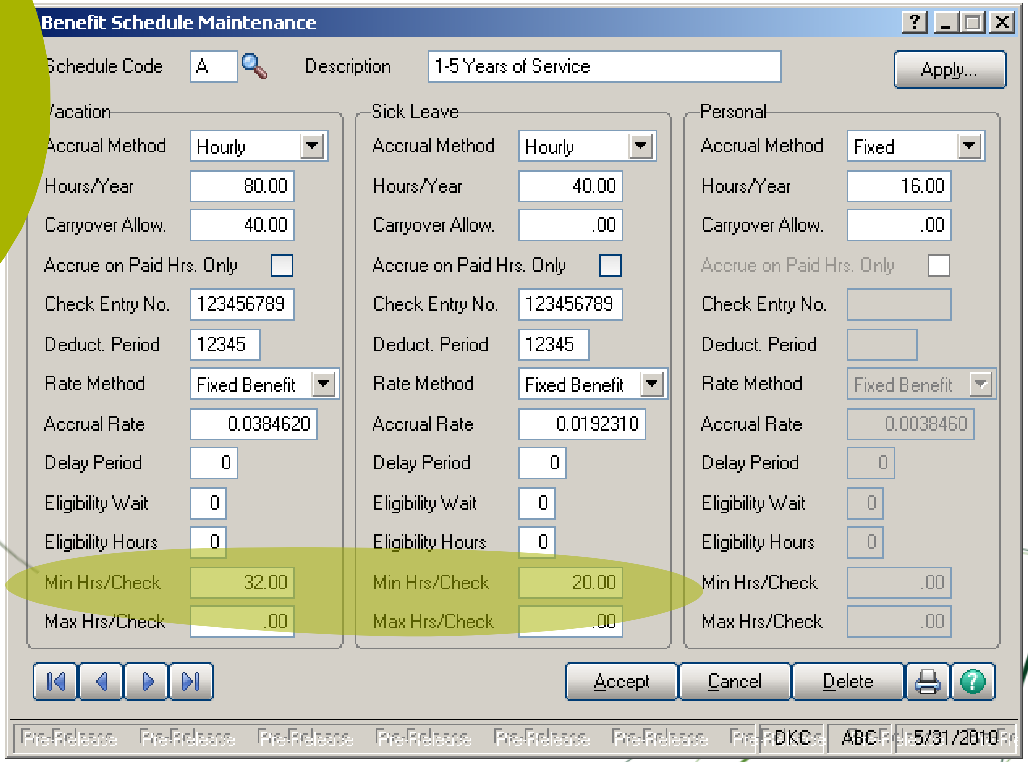
- Payroll data entry importing
  - Visual Integrator was redesigned to allow importing of 5 common payroll formats
    - Fixed Field Format
    - ADP Format
    - ‘TimeBank’ or Kronos Connect Format with department + employee number imported
    - TimeBank’ or Kronos Connect Format with only employee number imported.
    - Fixed Field Format for Timetrack v8.0



Version 4.5 – Payroll Enhancements

- Enhanced benefit accrual

Define different Benefit Code Schedules for Hours Worked and manage benefit accruals based on hours worked, supporting salaried employees, union employees, and part time employees

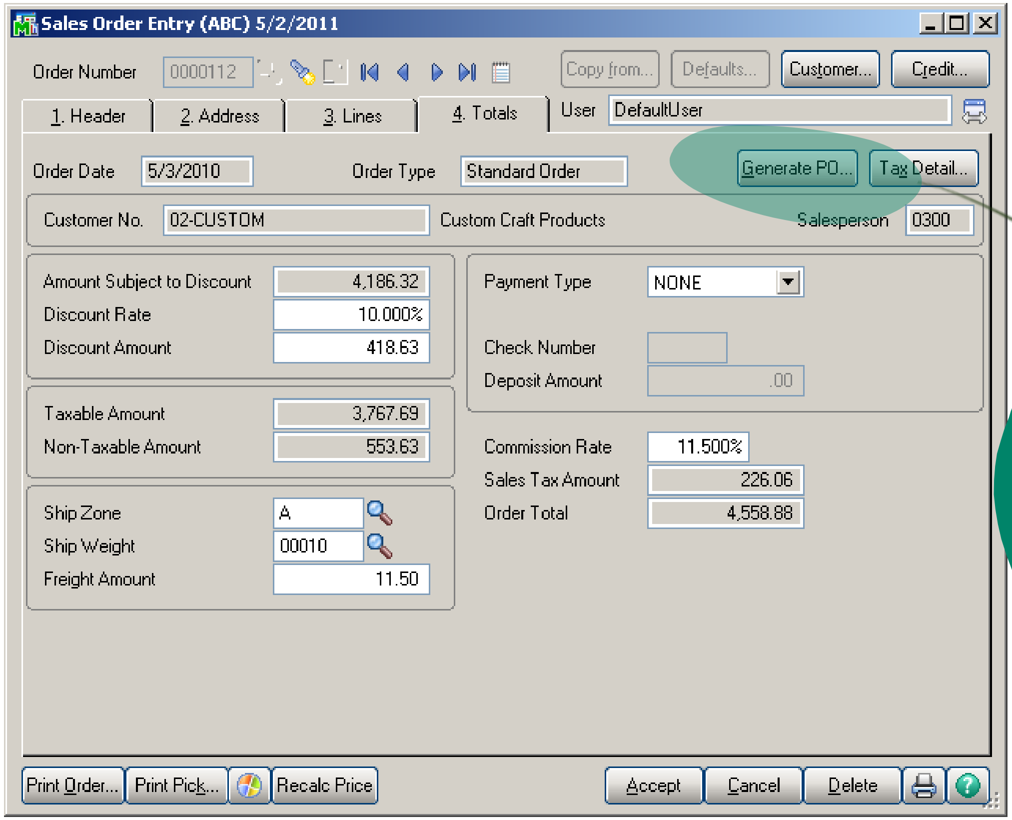


Version 4.5 – Sales Order Enhancements

- Auto generate purchase orders from sales order entry – similar to SO-1489
- Purchase orders created from sales orders - similar to PO-1020
- Price level by customer or product line – similar to SO-1005
- Item pricing by total quantity – similar to SO-1173
- Enhanced sales order integration with job cost – similar to SO-1530
- Lot/serial distribution entry from sales order – similar to SO-1175
- Maintain split commissions by customer – similar to SO-1417
- Commission rate table by salesperson/customer/item – similar to SO-1354

Version 4.5 – Sales Order Enhancements

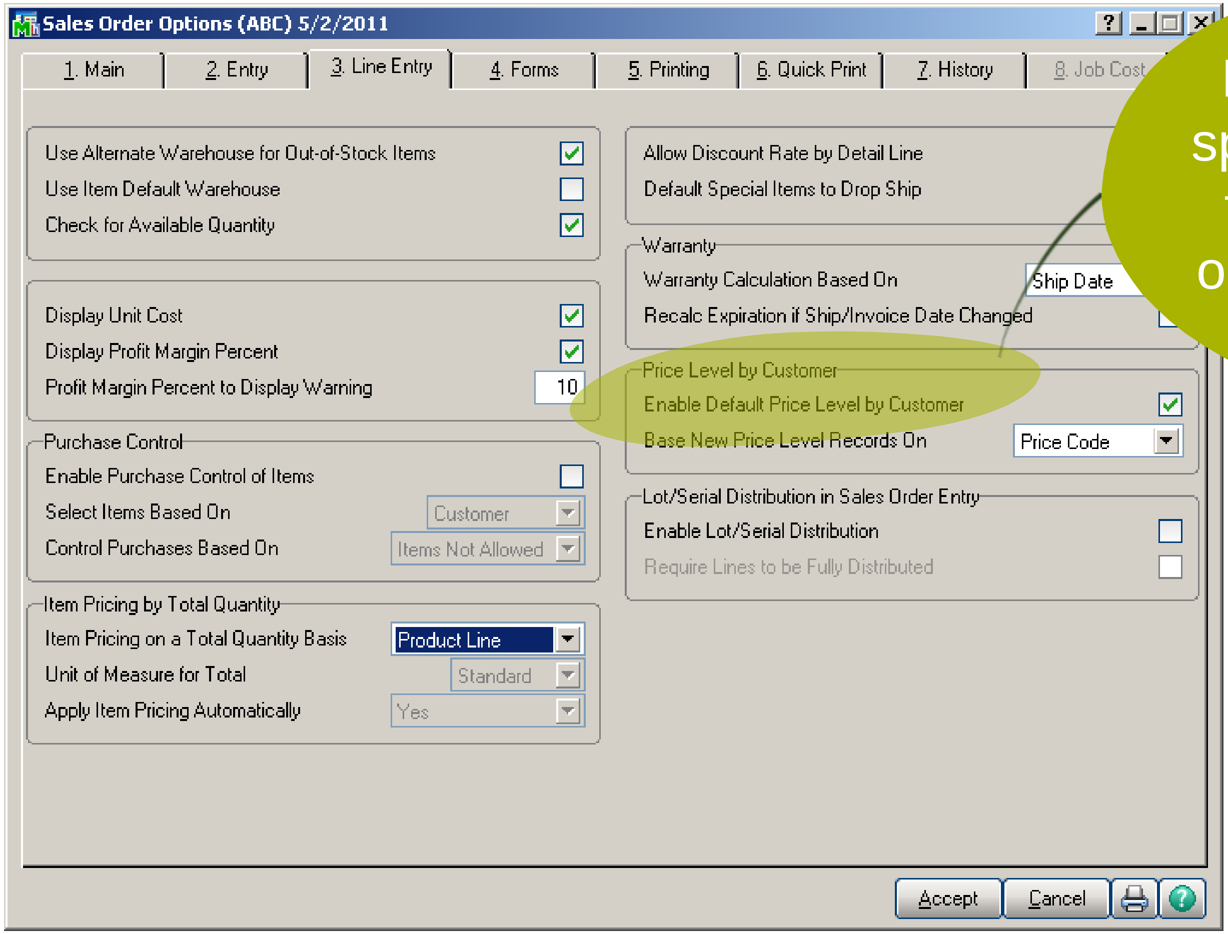
- Auto generate purchase orders from sales order entry and create purchase orders created from sales orders



Generate purchase orders from sales order entry or auto generate batches of purchase orders created from sales orders

Version 4.5 – Sales Order Enhancements

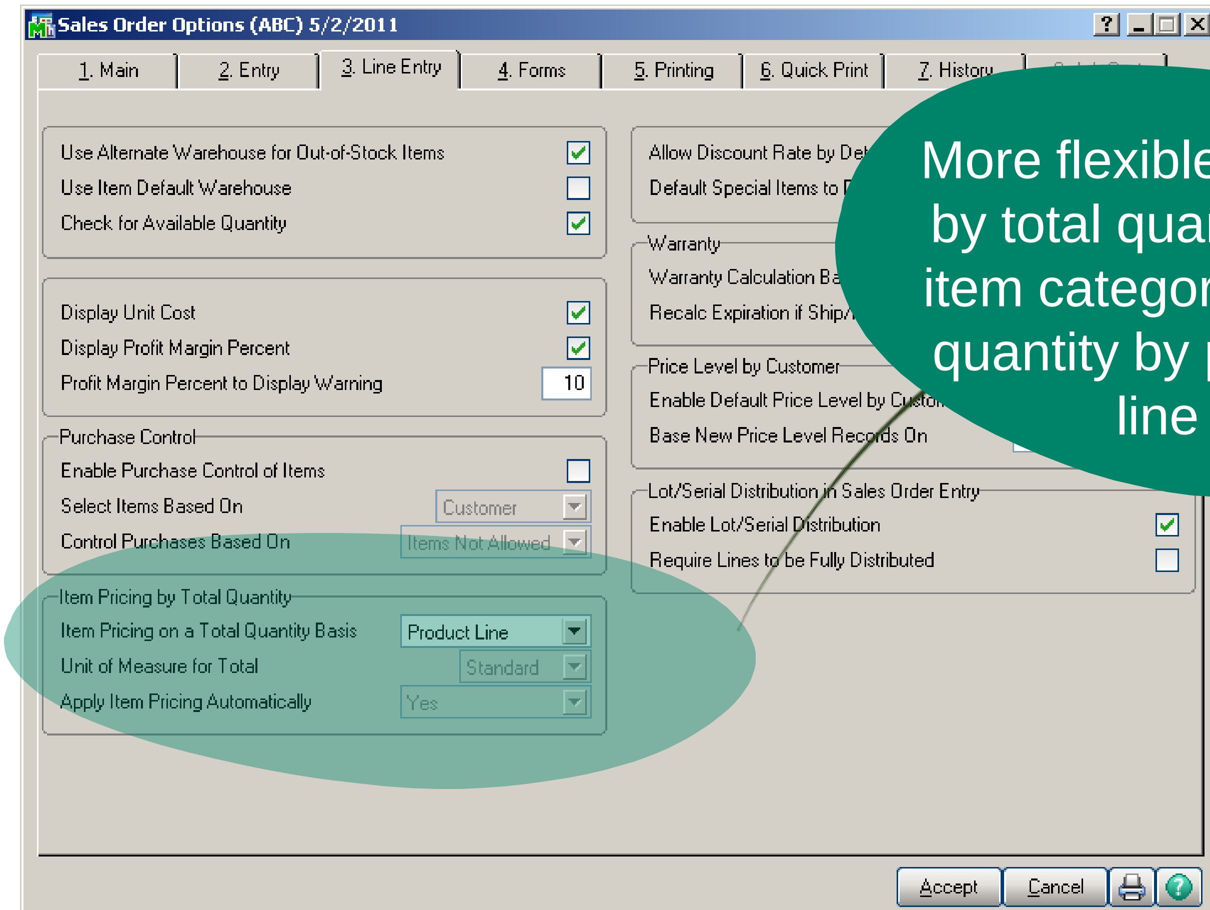
- Price level by customer or product line



Provide customers with special discount pricing at the product line level in order to meet competitive pricing pressures

Version 4.5 – Sales Order Enhancements

- Item pricing by total quantity

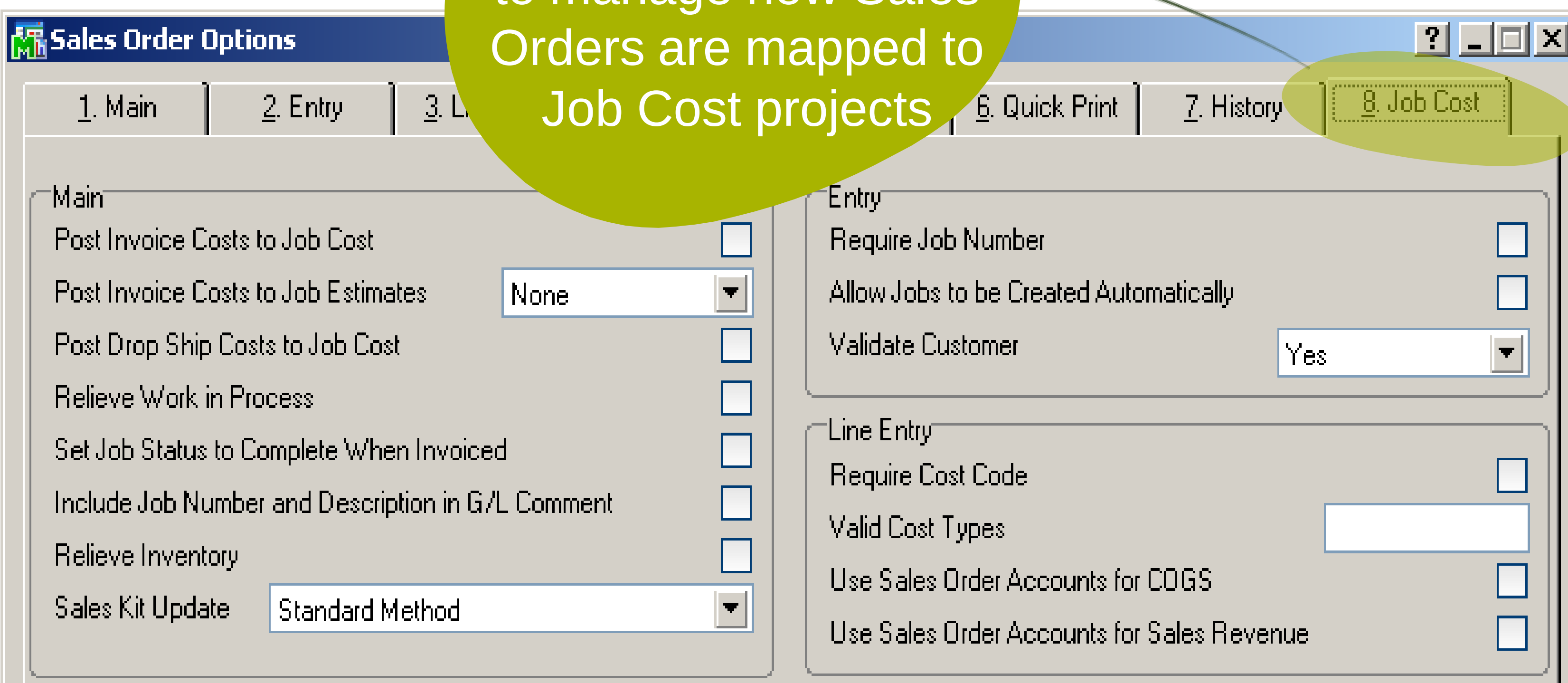


More flexible pricing by total quantity, by item category, or for quantity by product line

Version 4.5 – Sales Order Enhancements

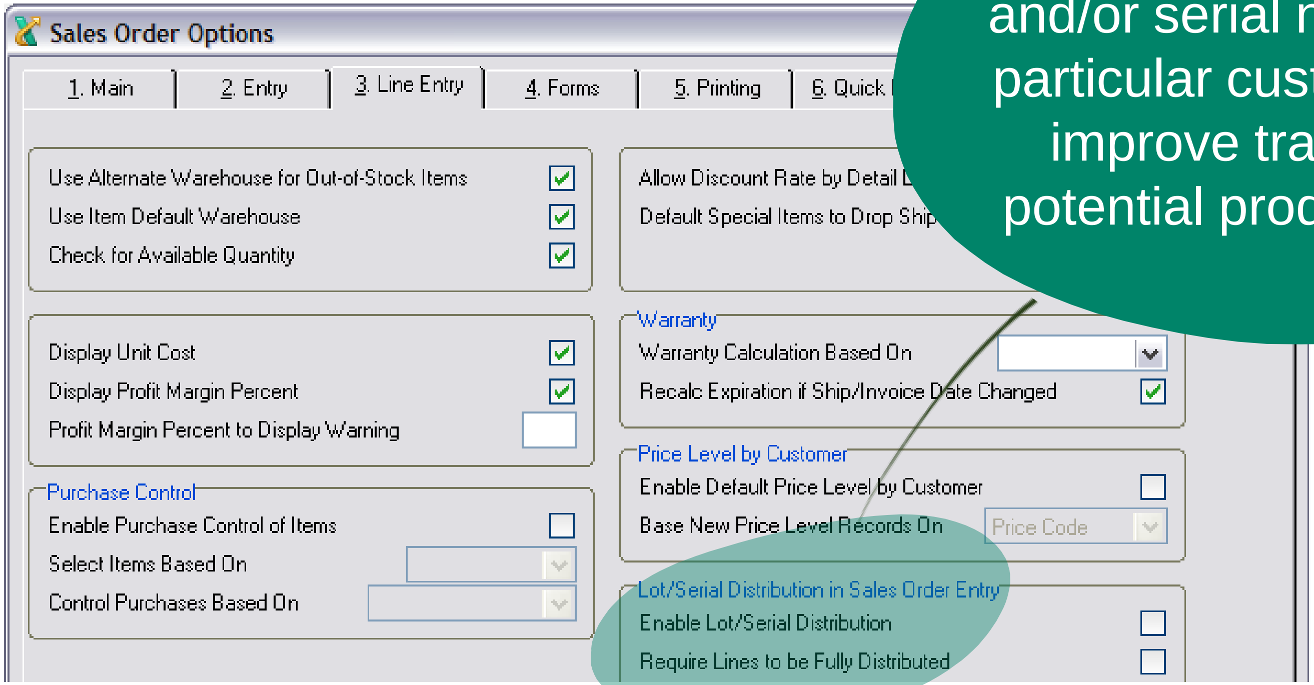
- Enhanced sales order integration with job cost

New Job Cost tab offers additional ways to manage how Sales Orders are mapped to Job Cost projects



Version 4.5 – Sales Order Enhancements

- Lot/serial distribution entry from sales order

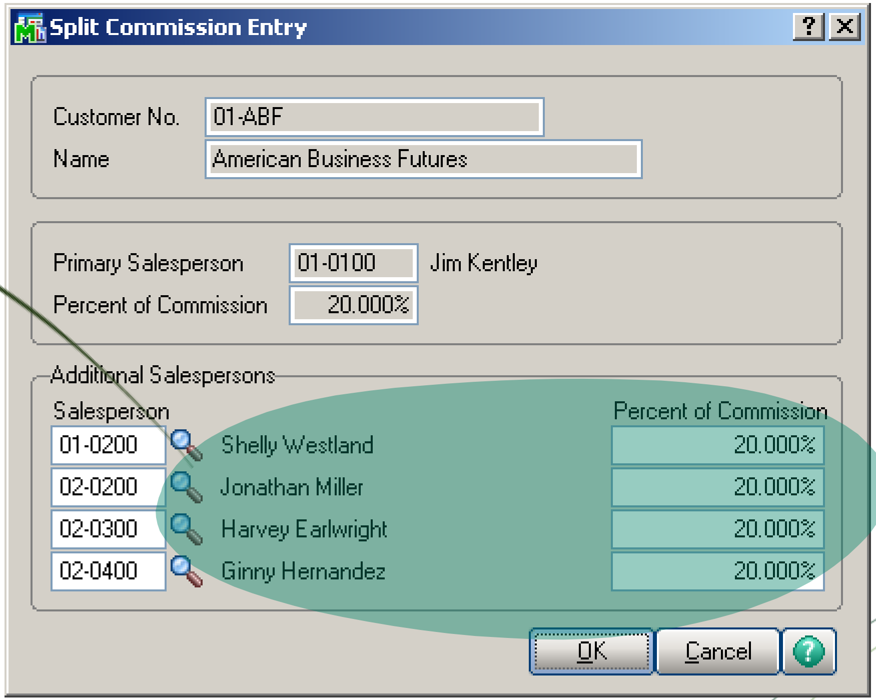


Reserve specific lots and/or serial numbers for particular customers and improve tracking for potential product recalls

Version 4.5 – Sales Order Enhancements

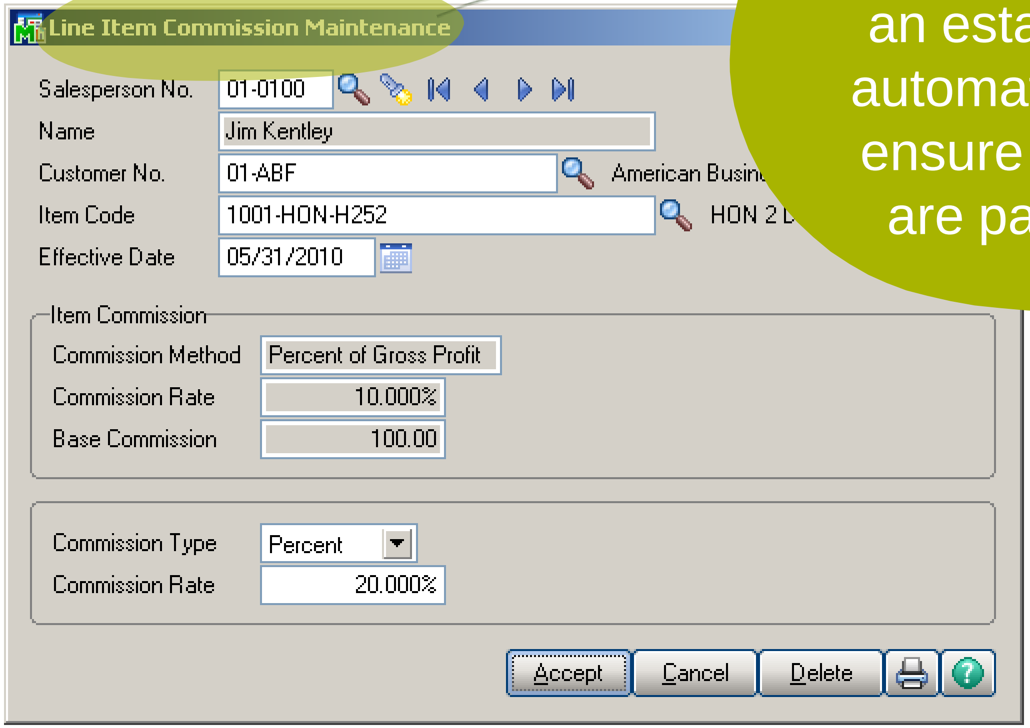
- Maintain split commissions by customer

Establish and maintain default split commissions between multiple salespeople by customer



Version 4.5 – Sales Order Enhancements

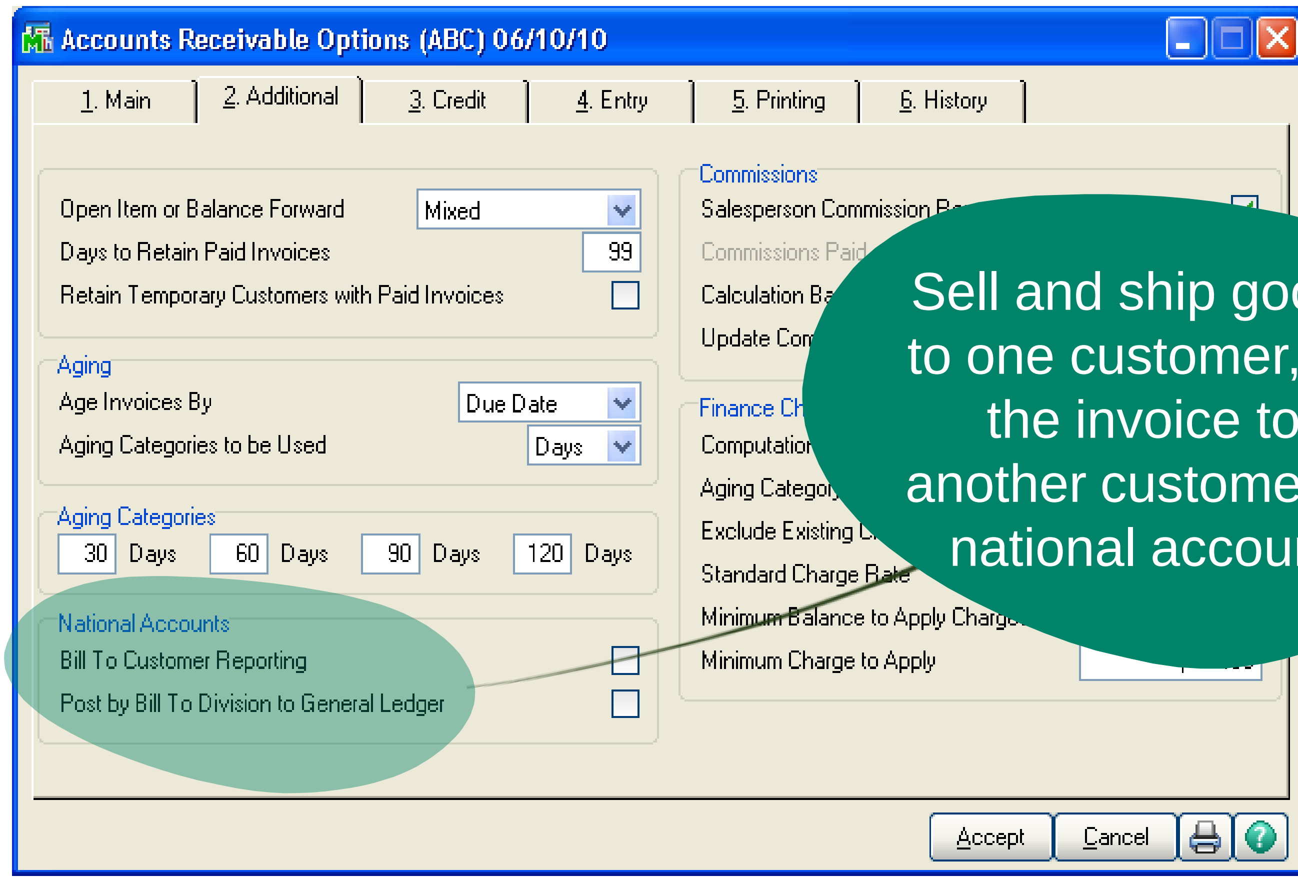
- Commission rate table by salesperson/customer/item



The new commission rate tables will provide an established and automatic method to ensure salespeople are paid correctly

Version 4.5 – Accounts Receivable Enhancements

- Customers with national accounts - similar to AR-1068



Sell and ship goods to one customer, bill the invoice to another customer or national account

Version 4.5 – Database Options

- Choice of database
  - – Microsoft SQL Server 2008 R2
  - – ProvideX
- Upgrade paths
  - – Upgrade from v3.7x SQL to v4.5 SQL
  - – Upgrade from ProvideX v4.4 to v4.5 SQL

Version 4.5 - SageCRM Integration

- SageCRM v7.1 integrated with Sage MAS 90 and 200 v4.5
  - Free SageCRM Server included
  - One (1) free SageCRM user license included with every v4.5 system
- The benefits of integrated front and back office available to all Sage ERP MAS 90 and 200 customers
  - **Be more productive -** Use SageCRM's powerful workflow engine to easily automate your most critical business processes making sure nothing falls through the cracks
  - **Provide better insight -** Quick and cost effective integration with Sage ERP MAS allows front-office staff to leverage ERP data and functionality, delivering deeper customer insight
  - **Maximize collaboration -** Achieve maximum effectiveness by reducing the errors and pushing service levels to new heights, improving customer loyalty and retention, boosting sales

Learn more about Version 4.5

Pre-Release Guide and
Frequently Asked Questions
Partner File Center

Sage ERP

SageCRM Version 7.1

Integrated with Sage ERP MAS 90 and 200 v4.5

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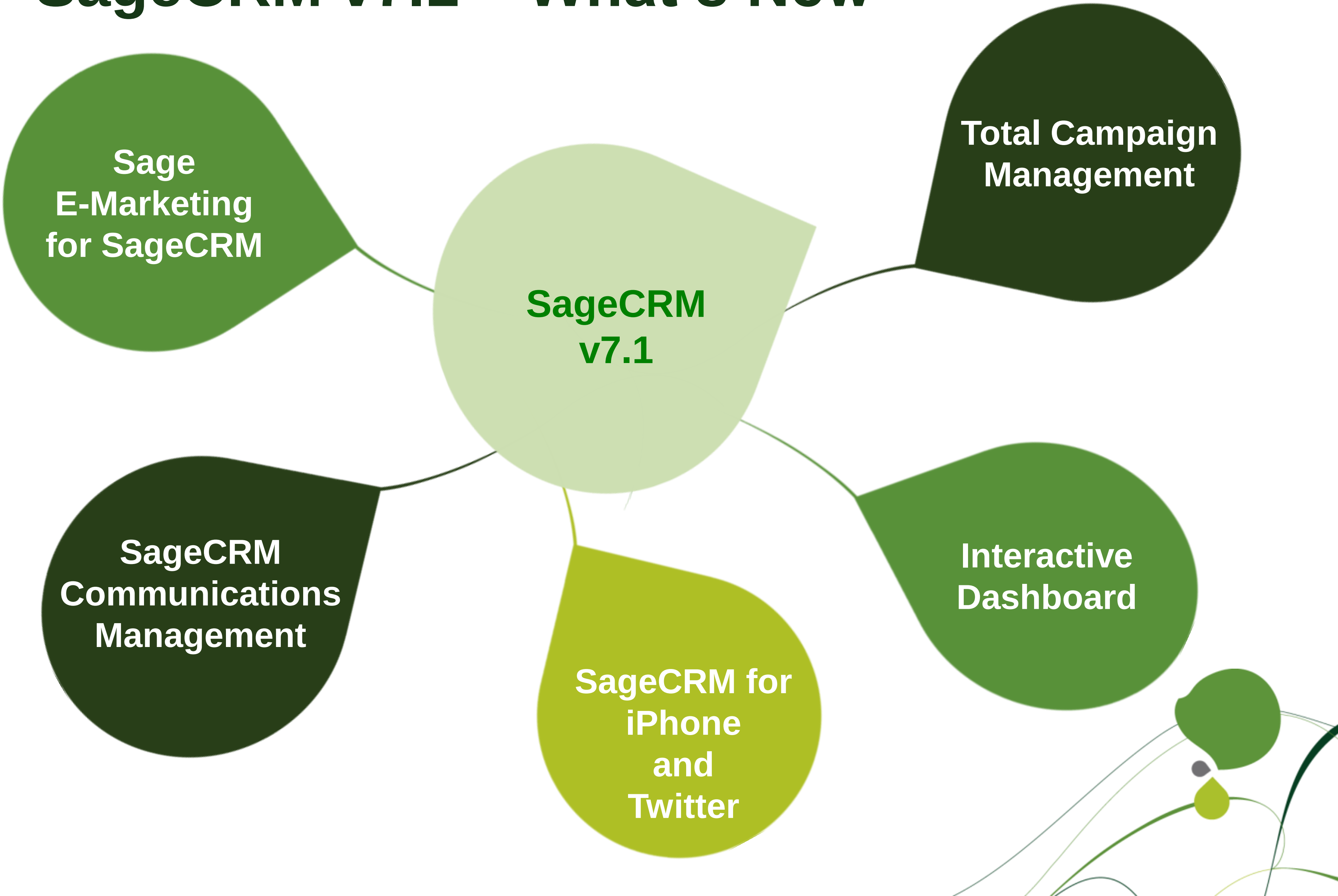
SageCRM v7.1 – What's New



Sage eMarketing for SageCRM

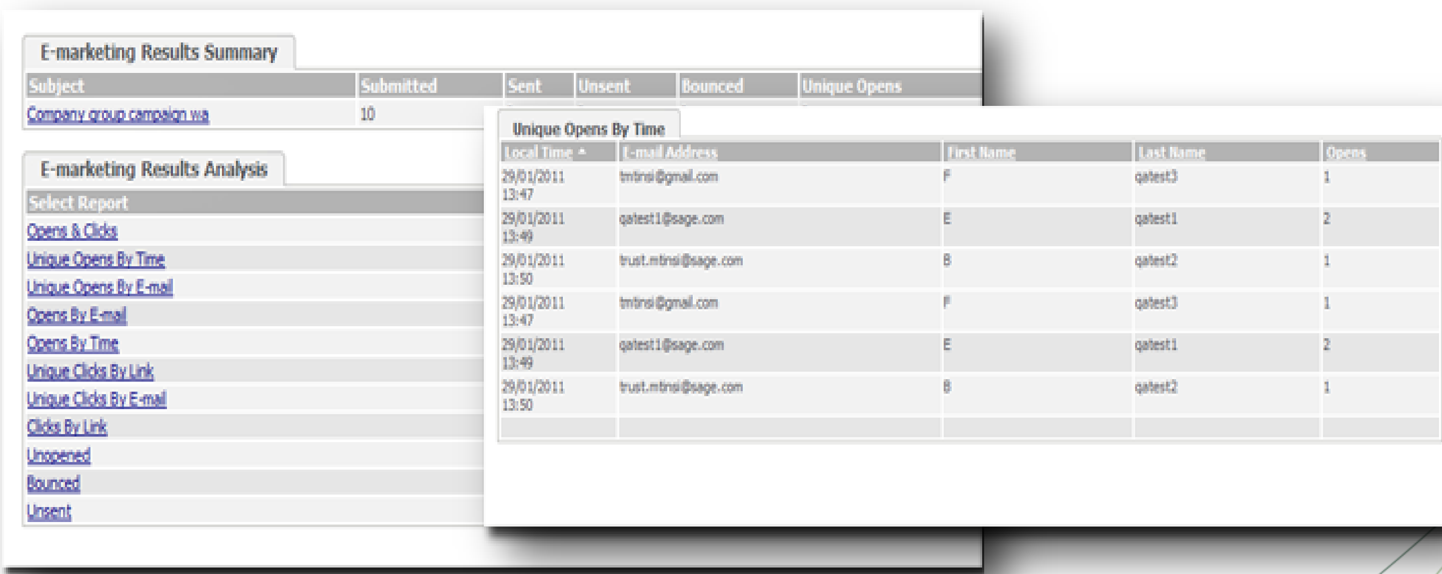
A Sage Connected Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- Low monthly subscription fee

Sage eMarketing for SageCRM

A Sage Connected Service

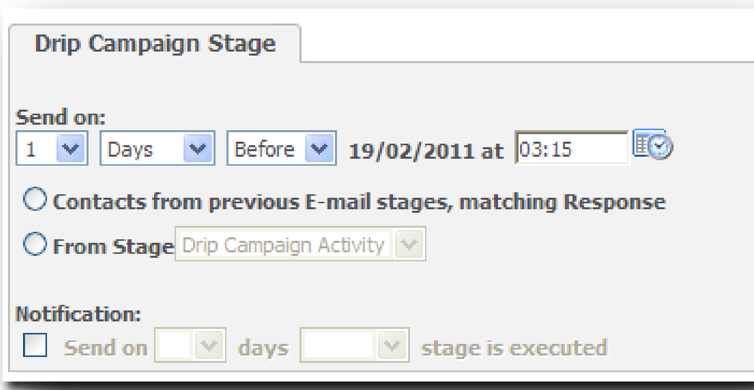
- Analyze results without ever leaving SageCRM
  - Track and monitor recipient interaction such as sent, bounced, opened and click data
  - View, filter, report and export the results
  - Create new groups within SageCRM from the results

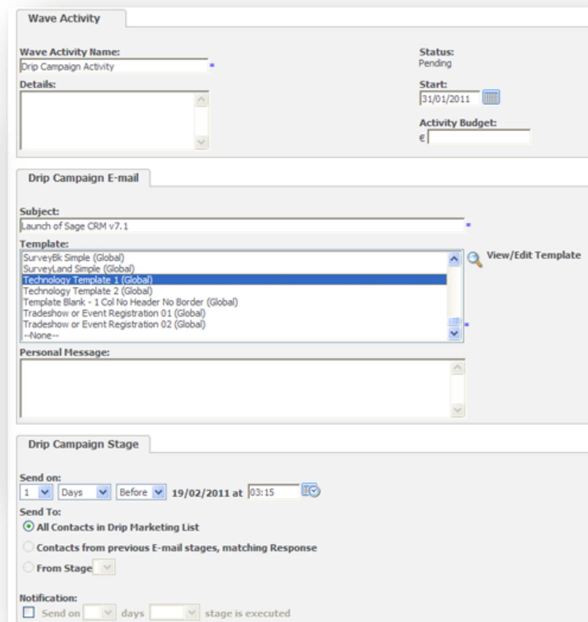


Sage eMarketing for SageCRM

A Sage
Connected
Service

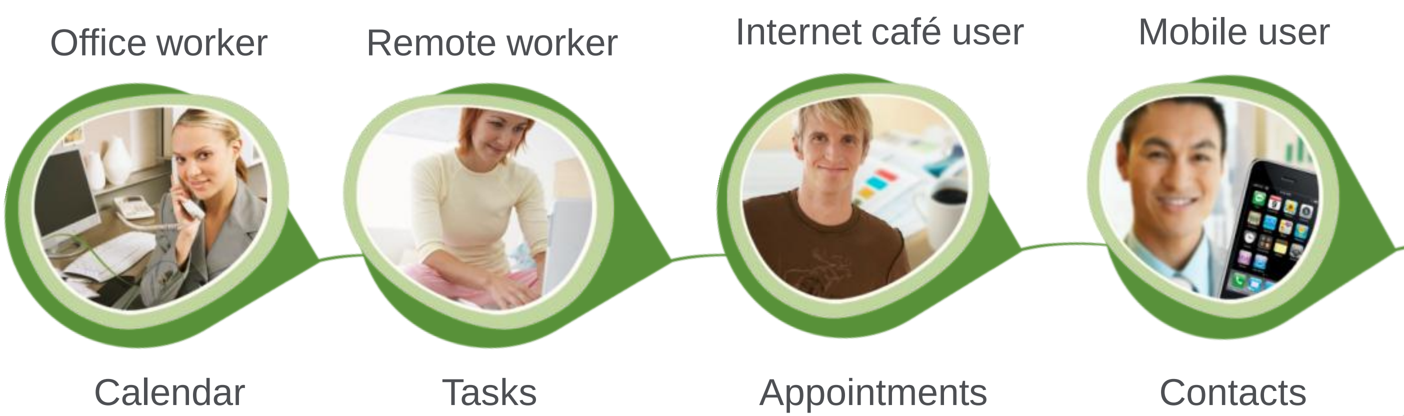
- Drip Marketing: Let SageCRM do the work!
  - Easy-to-create automated E-marketing Campaigns
  - Schedule a series of E-marketing activities based on the recipient interaction
  - Automatically create outbound call-lists based on recipients who are interested in your campaign





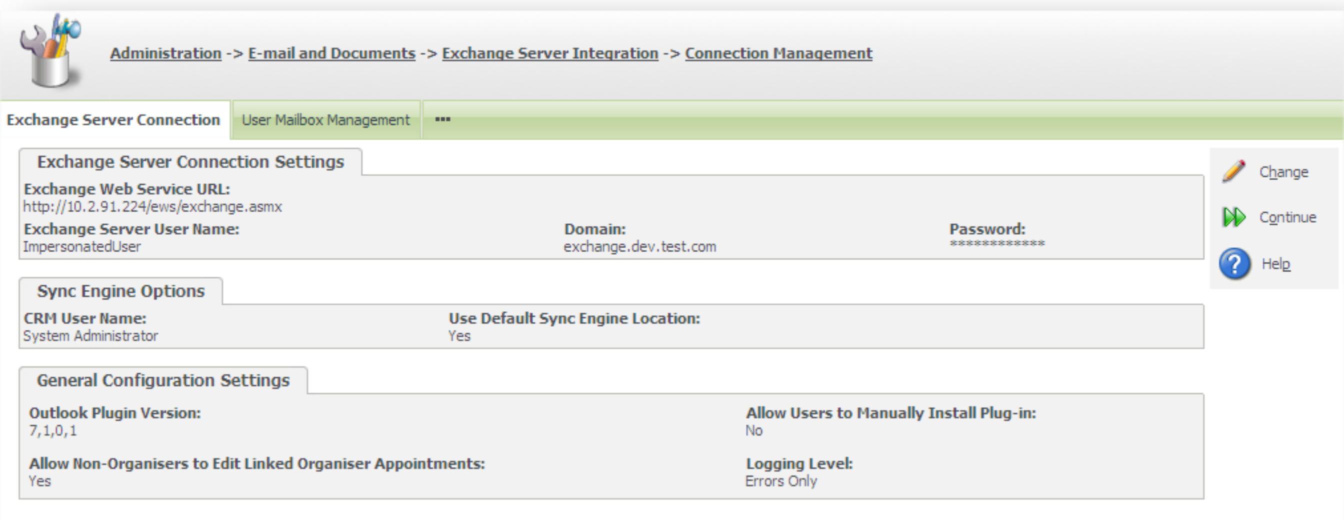
SageCRM Communications Management

- Point-and-click integration with MS Exchange for seamless calendar and communications management regardless of device or location
  - – MS Exchange integration with easy point-and-click deployment
  - – Server to Server Sync
- Unify all customer interactions and communication history



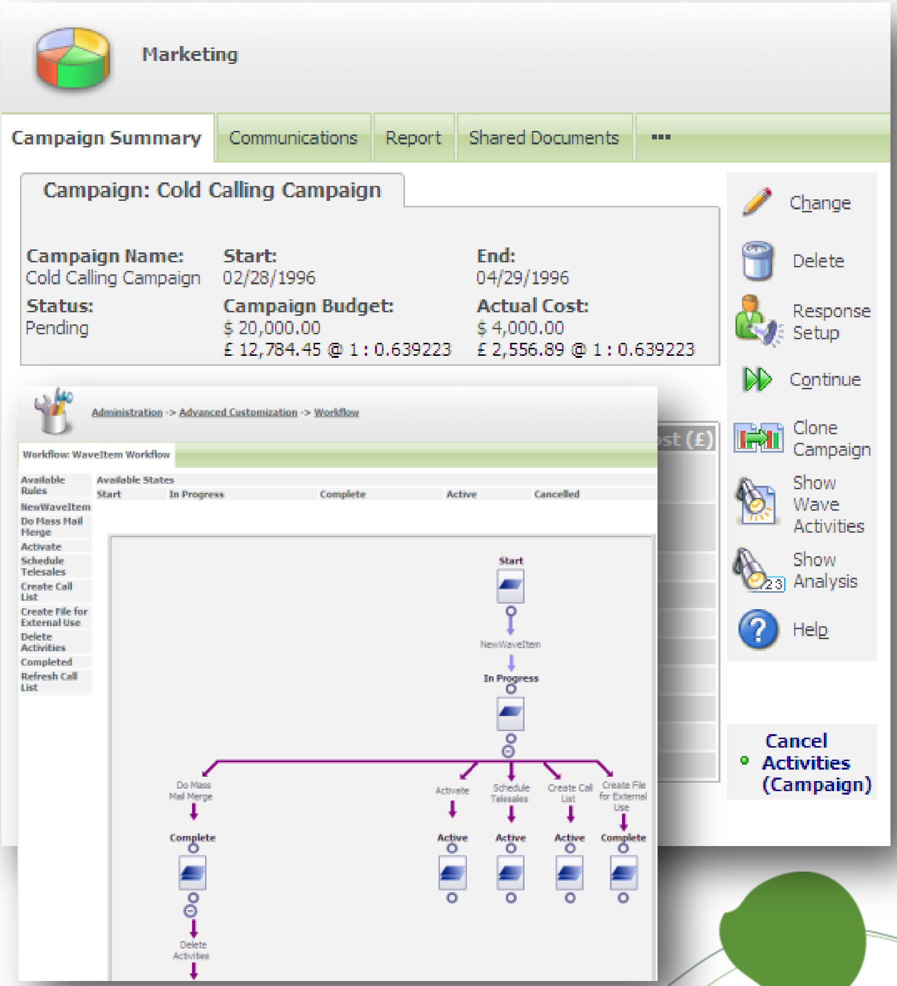
SageCRM Microsoft Exchange Server Integration

- Completely point-and-click based configuration
- Select specific mailboxes to synchronize
- Seamlessly store external attendees in customer meetings against relevant CRM contact
- File multiple e-mails against multiple targets

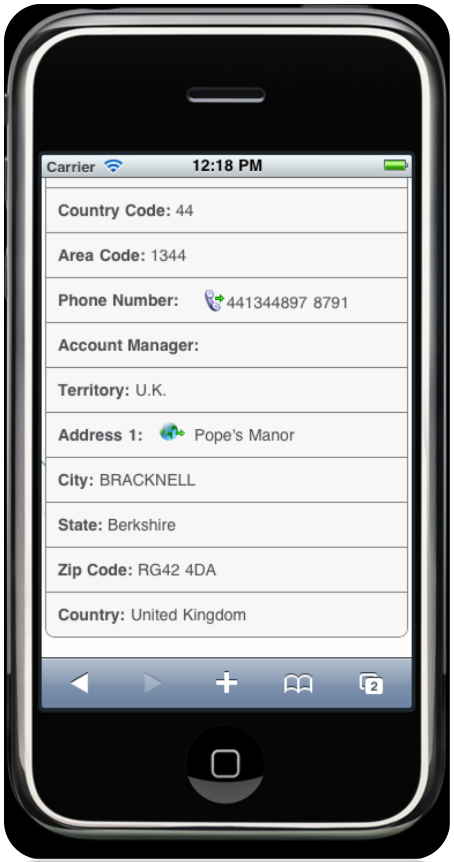


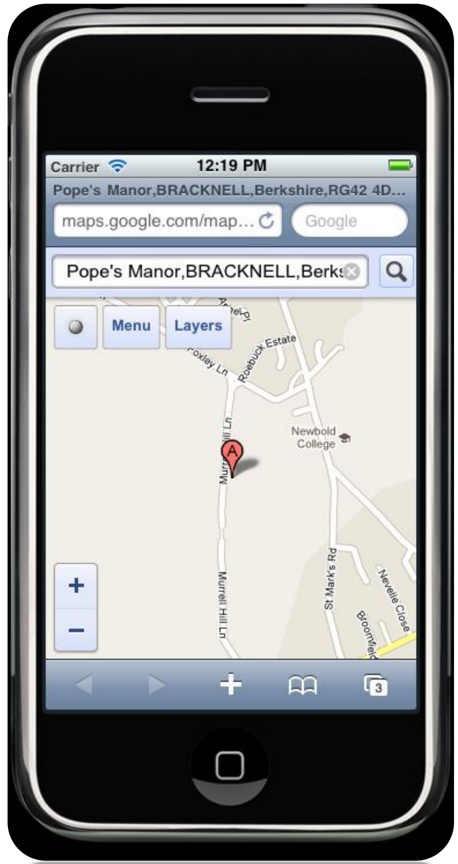
SageCRM Total Campaign Management

- Multi-channel campaign management
- Campaign cloning
- Out-of-the-box graphical marketing campaign workflow
- Budget over-run alerts
- In-call data modification



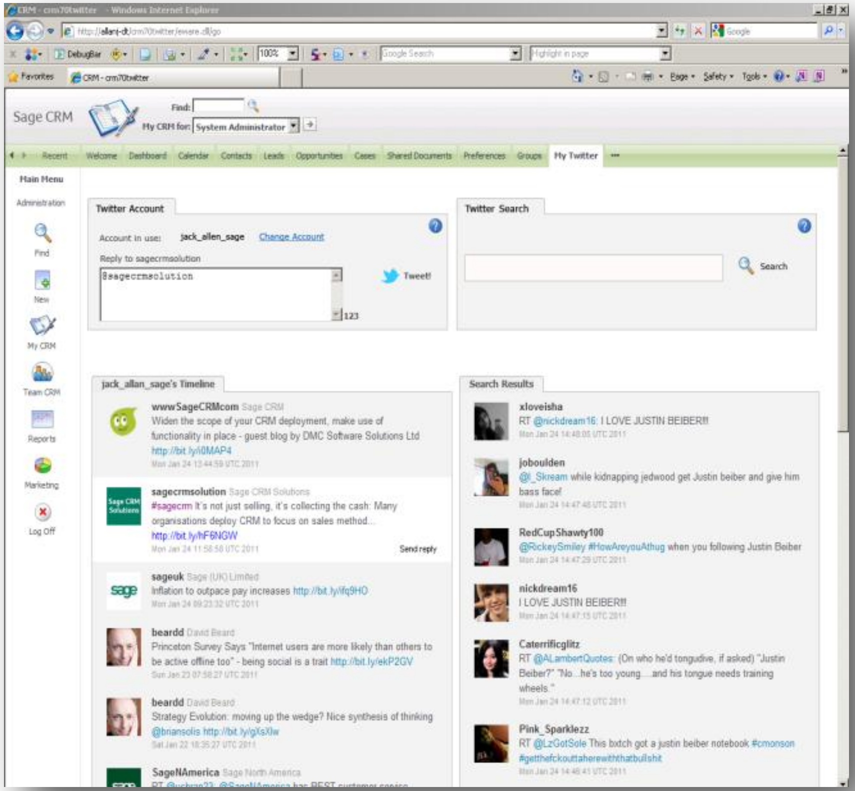
SageCRM for iPhone





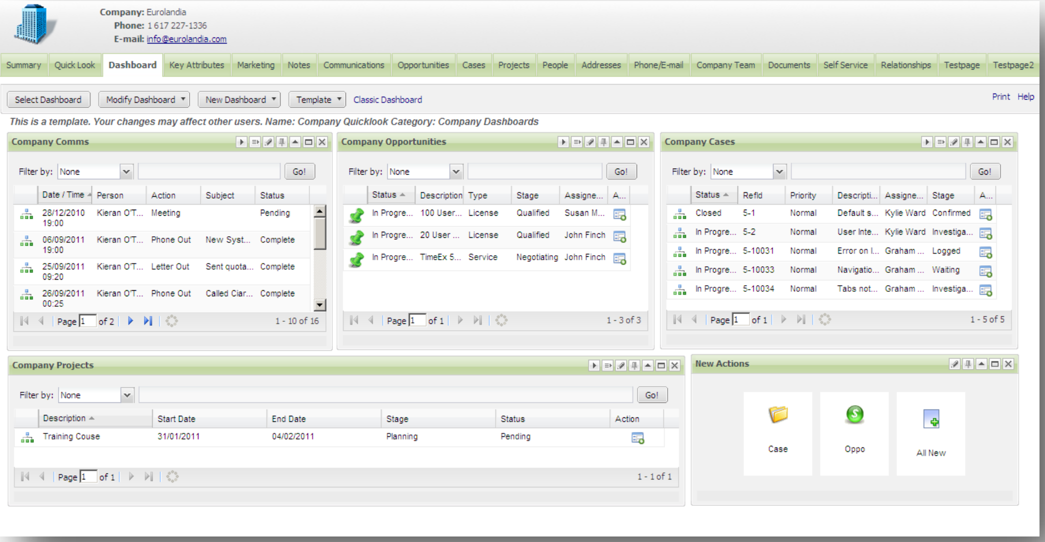
SageCRM for Twitter

- View and update Twitter
- View and post to a company’s and/or person’s Twitter feed
- Search for tweets about any company/person
- Save tweets against a company or person in SageCRM



SageCRM Interactive Dashboard

- Manage key accounts and working day from a single screen
- Delivers key business metrics for easy analysis
- Role-based dashboards out-of-the-box for Sales, Marketing, Customer Service and Management
- Flexible gadgets for maximum personalization



Learn more at http://www.sagecrm.com/v7.1

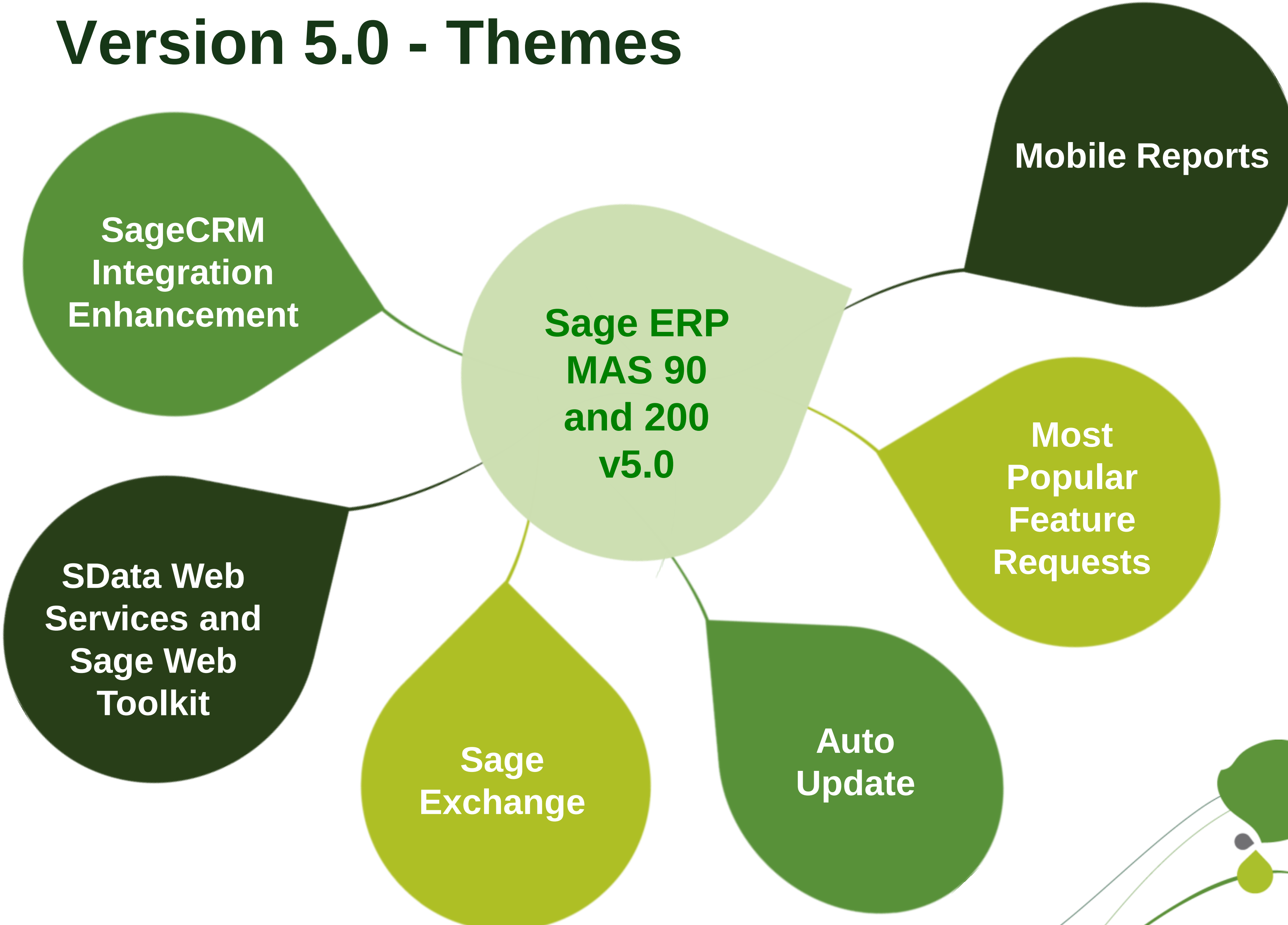
SageCRM Community
https://community.sagecrm.com/

Sage ERP

Sage ERP MAS 90 and 200 Version 5.0

sage

Version 5.0 - Themes



Sage ERP Web Technology Stack

Extending ERP with Sage Web Technology

SData web services	Sage Web Toolkit	Auto-Update	Customizer	Sage Advisor	Sage Portal	Sage Exchange	Web provisioning infrastructure

Enables the creation of

Mobile Apps	Web Apps	Web Screens	Application Integrations	Mash-ups	Snapshots

Providing to customers

Workflow enhancements	Usability enhancements	Self service	Integrated end-to-end solutions	Connected services	Deployment options	Embedded business intelligence	Ubiquitous access

Version 5.0 – SData Web Services and Sage Web Toolkit

- Mobile-enabled web architecture built on industry standard technologies
  - Create web applications with Sage Web Toolkit (SWT)
    - Built using technology from Google
  - Integrate data and applications with SData (SageData)
    - Provides XML-based RESTful web services interface
    - Uses HTTP for communications
  - Browser-neutral and zero-client user interface based on HTML5/CSS3/Javascript
    - Supports iOS and Android devices and newer Blackberries
    - Supports Windows Phone with embedded IE 9

Version 5.0 – Sage Exchange

A Sage Connected Service

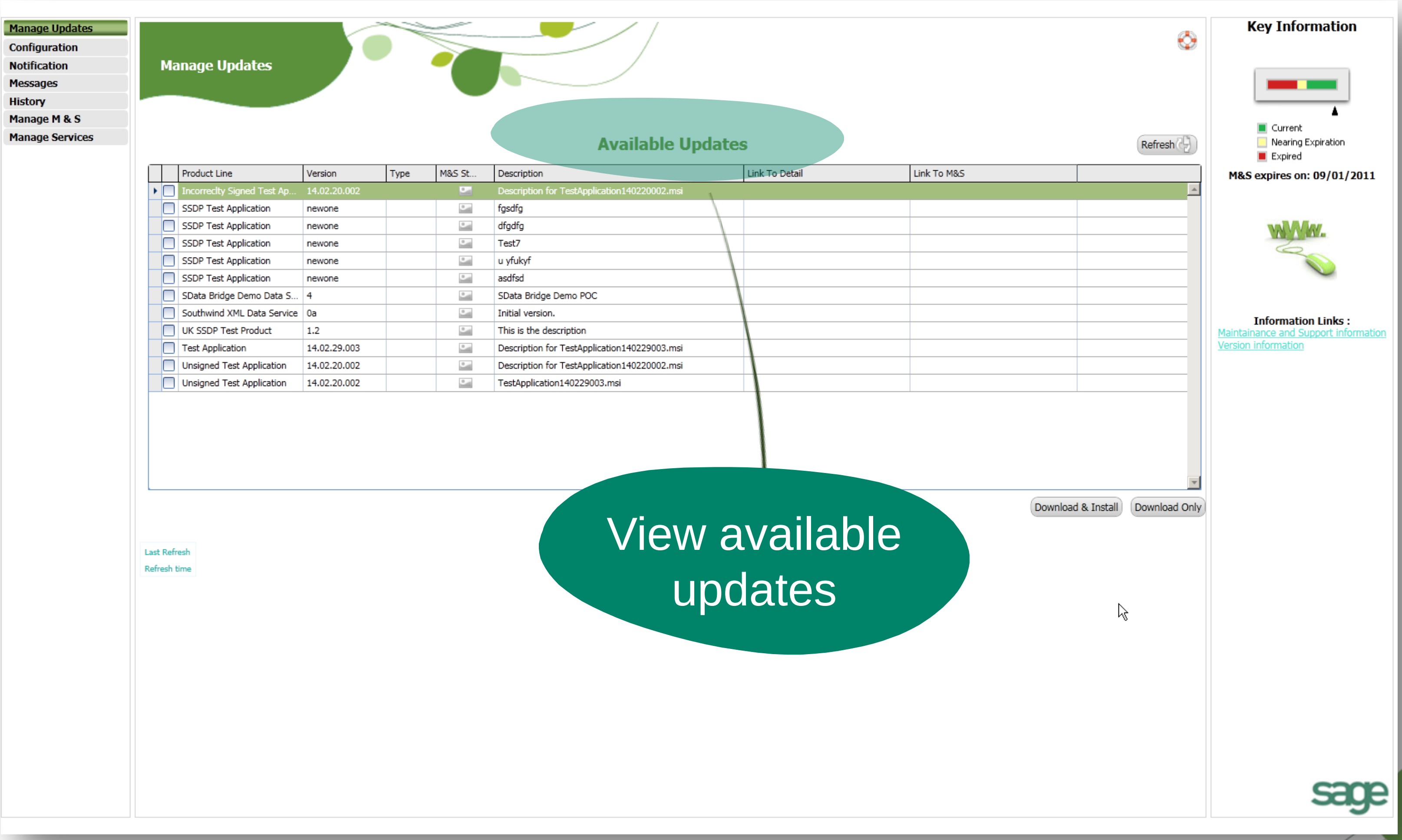
- Sage Exchange payment platform provides a versatile PA-DSS certified environment to facilitate the exchange of payment data to and from business software
- Sage Exchange connects to a new Sage Exchange Virtual Terminal with card swipe capability, and new best-in-class encrypted point-of-sale terminals

For more information
http://www.sagepayments.com/Sage-Services/Sage-Exchange.aspx

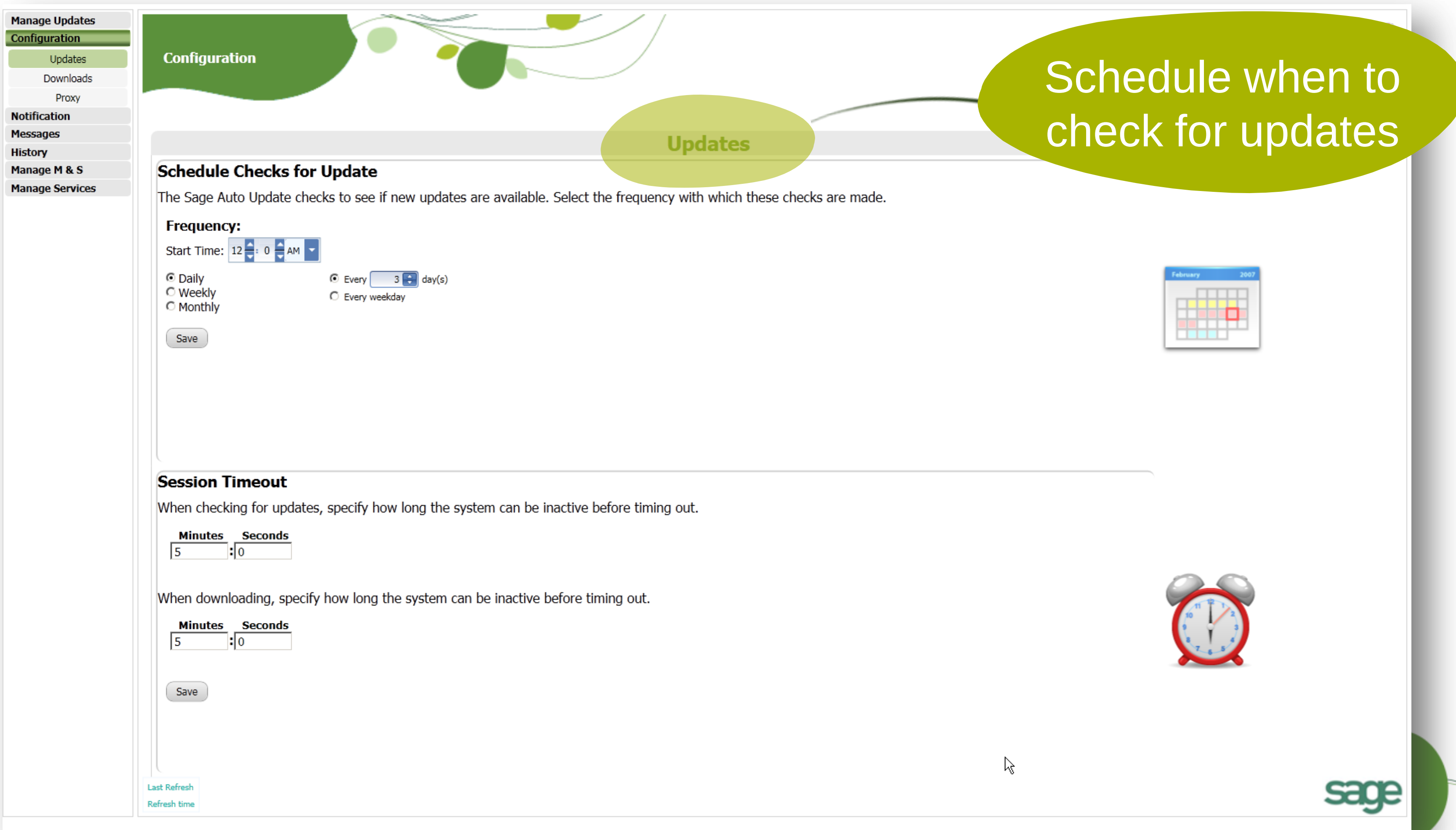
Version 5.0 – Auto Update

- Self-service management of software updates
  - View messages on availability of new releases and product updates
  - Download installation component for manual installations
  - View maintenance and support entitlement and expiration dates
  - Schedule checks for updates
  - Pre-requisite checker for updates and fixes
- Coming in Version 5.1
  - In-product installation of hot fixes and product updates
  - Smart updates to detect customizations and integrations

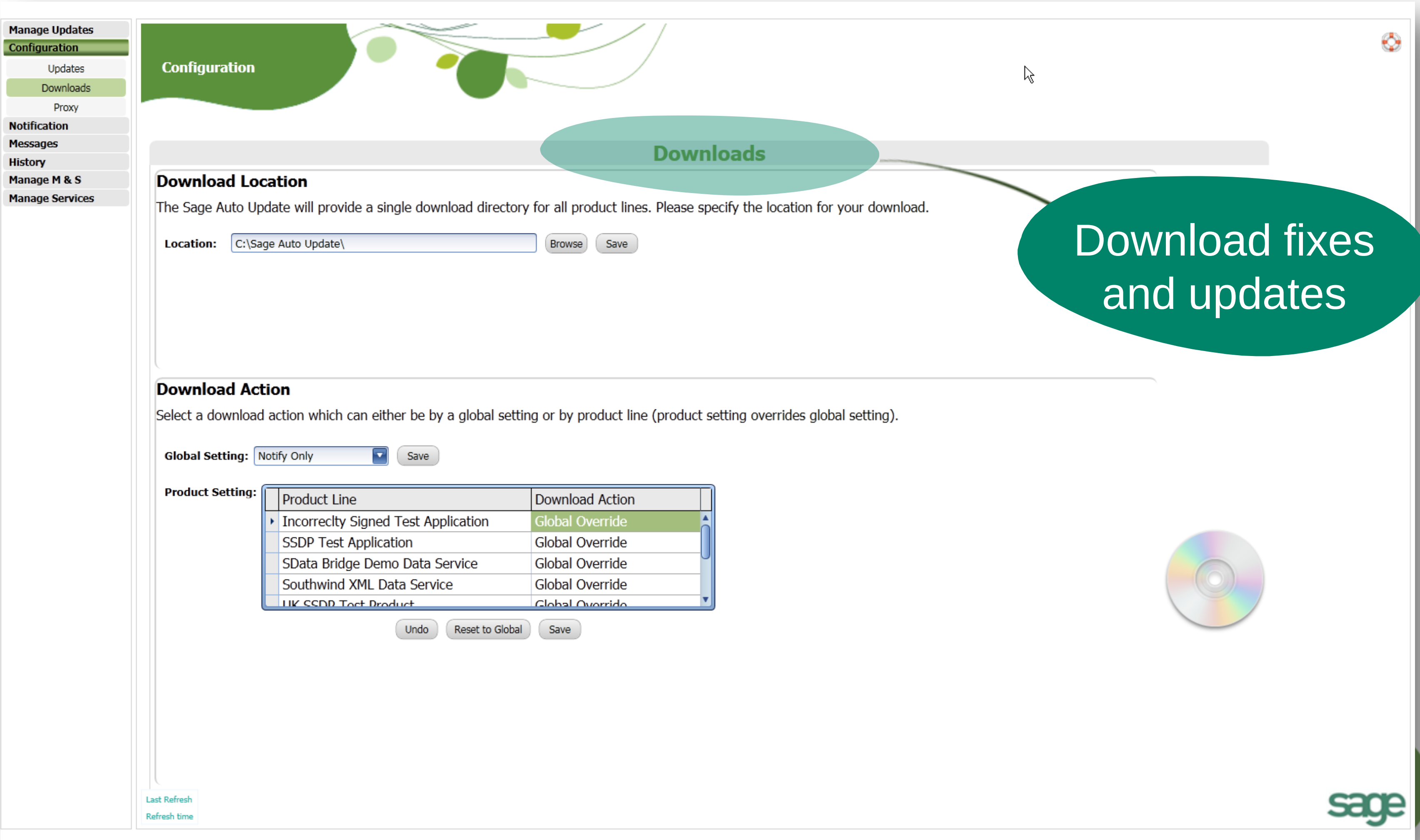
Version 5.0 – Auto Update



Version 5.0 – Auto Update



Version 5.0 – Auto Update



Version 5.0 – Feature Requests

- Based on feedback from www.sagemas.com/MAS_90_200_feedback
- Under consideration
  - Accounts payable invoice number expansion
  - Inactivate customers and vendors
  - Delete, renumber or merge inventory from “dead” warehouses

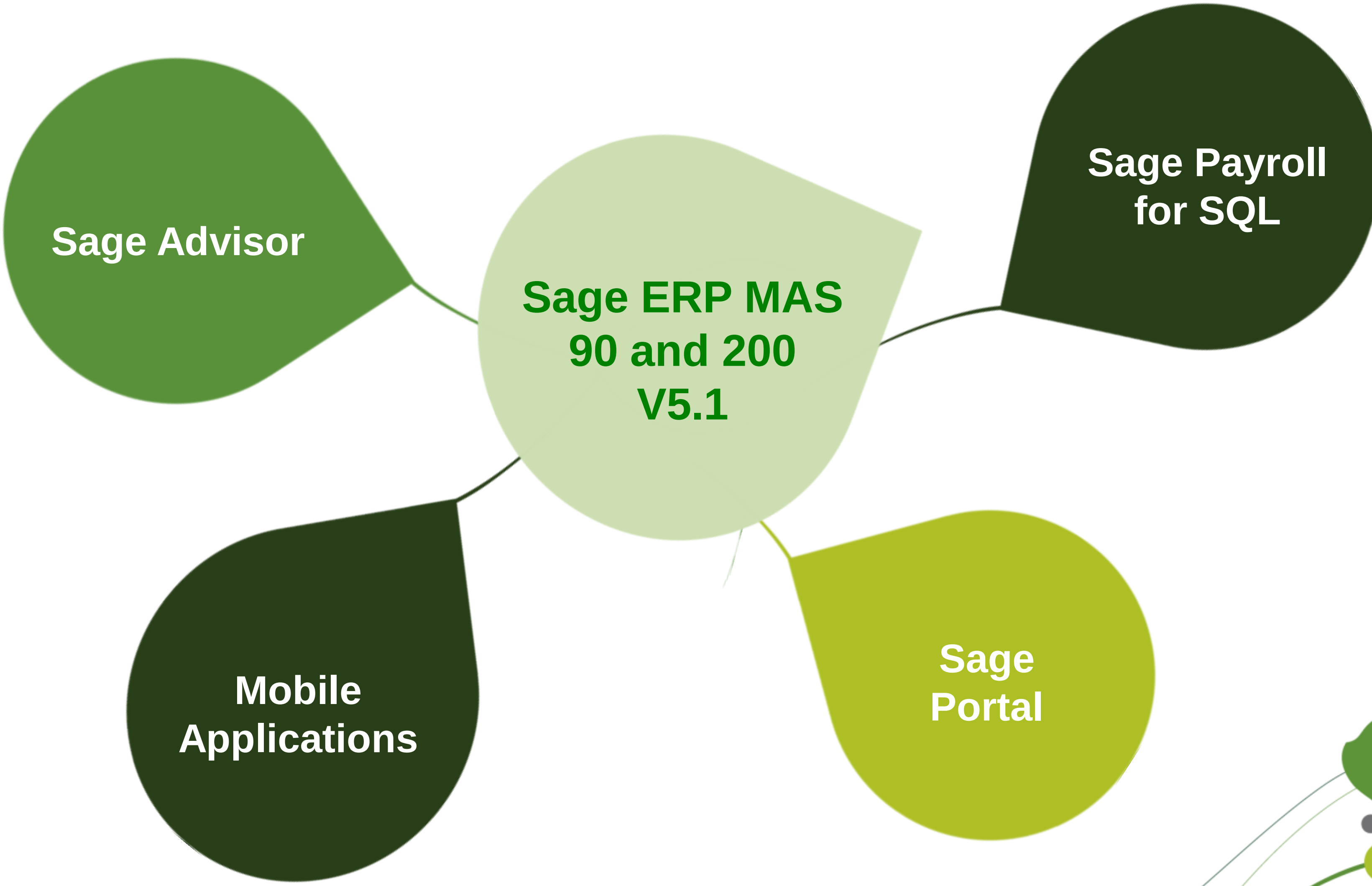
Version 5.0 – SageCRM

- SageCRM integration and workflows
- Under consideration
  - Map multiple companies to single SageCRM system
  - Simplify the quote-to-order workflow and processing for SageCRM users
  - Enable SageCRM users to look up inventory, customer purchase history, credit information and other customer data
  - Ability to synchronize UDF fields between ERP and CRM

Version 5.0 – Mobile Reports

- Usability Studies Underway
  - Will drive requirements
- View Reports via Smartphone
  - iPhone, Droid, Blackberry
  - iPad
- Submit Report Request via Mobile Request
  - View only your reports
  - Saved Report Settings

Version 5.1 – Themes



End of Support Dates

- Versions 3.7x SQL/4.0/4.05/4.1 - September 30, 2011
- Version 4.2 – September 30, 2012
- Version 4.3 – September 30, 2013
- Version 4.4 – September 30, 2014
- Version 4.45 – March 30, 2012
- Extended Enterprise Suite versions 1.3/1.4 – September 30, 2012

For more details see
http://infosource.sagesoftwareonline.com/sw_attach/sso/SupportPolicy_MAS.pdf

Additional Resources

Sage ERP MAS Community
http://community.sagemas.com

Get Your Voice Heard - Enhancement Requests
www.sagemas.com/MAS_90_200_feedback

LinkedIn Group
MAS 90 and 200 Users and Consultants
http://www.linkedin.com/groups?mostPopular=&gid=1644357&trk=myg_ugrp_ovr