

Vision Municipal Solutions

Annual Conference

October 7th – October 9th 2015, Leavenworth, WA



Welcome to the Vision 2015 Conference! We are excited to be back in Leavenworth to get to know the newest members of the Vision family and re-connect with our long-time Vision customers and dear friends.

2015 Conference Agenda

WEDNESDAY, OCTOBER 7TH, 2015

7:00am - 9:00am	4TH FLOOR, CONTINENTAL BREAKFAST
	ALPINE ROOM (LOWER LEVEL)
9:00am – 9:30am	OPENING CEREMONIES & CONFERENCE OVERVIEW <i>PRESENTERS: PAT DIETER & CHAD HEATON</i>
9:30am – 9:45am	VISION'S STATE OF THE UNION ADDRESS <i>PRESENTERS: CRAIG LODGARD</i>
9:45am – 10:30am	Vision Software presentations (Existing Product Review and Progress Update) <i>PRESENTERS: PAT DIETER & CHAD HEATON</i>
	BREAK TIME
10:45am – 12:00pm	VISION SOFTWARE PRESENTATIONS (NEW TOOLS & TECHNOLOGIES) <i>PRESENTERS: WILL JONES & JOE SAGE</i>
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)
1:00pm – 2:00pm	Vision Software presentations (Current Products for 2015) <i>PRESENTERS: PAT DIETER & CHAD HEATON</i>
2:00pm – 2:45pm	Vision IT (New Managed Services for 2016) <i>Presenter: Brandon Votaw</i>
	BREAK TIME
3:00pm – 4:45pm	Training Block <i>(See Schedule for Classes and Room Assignments)</i>
5:00pm – 6:00pm	Miniature Golf Tournament MEET IN THE LOBBY
6:00pm	Dinner Break <i>(Enjoy dining in Downtown Leavenworth, on your own but very welcome to join the Vision staff)</i>
8:00pm – 10:00pm	Evening Reception <i>(Located at the Hutte, across from the Enzian, Join us for some Music Trivia - MC-Eric Delbo)</i>

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THURSDAY, OCTOBER 8TH, 2015

7:00am - 8:30am	4TH FLOOR, CONTINENTAL BREAKFAST
	ALPINE ROOM (LOWER LEVEL)
8:30am – 8:45am	DAILY CONFERENCE OVERVIEW <i>PRESENTER: CHAD HEATON</i>
8:45am – 9:45am	INVOICE CLOUD (EBPP SOLUTIONS) <i>PRESENTER: CARLYN ALTHEIDE</i>
9:45am – 11:00am	Vision Permits (Express, Standard, & Professional) <i>PRESENTERS: PAT DIETER, JOE SAGE & WILL JONES</i>
	BREAK TIME
11:15am – 12:00pm	NEXT UP 2016 VISION PARKS & REC & VISION MUNICIPAL CLERK RECORDER, CLIENT ACCESS PORTAL & REGIONAL USERS GROUPS (BRING YOUR IDEAS) <i>PRESENTERS: JOHN ENGBRETSON & CRAIG LODGARD</i>
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)
1:00pm – 2:00pm	BUDGET ISSUES – THE ECONOMY IS BETTER BUT IS LOCAL GOVERNMENT? <i>Presenter: Toni Nelson</i>
2:00pm – 2:45pm	Updates to 2016 Budget Suggestions <i>Presenter: Toni Nelson</i>
	BREAK TIME
3:00pm – 4:15pm	Training Block <i>(See Scheduled for Classes and Room Assignments)</i>
4:30pm – 6:30pm	SILVARA WINERY TOUR <i>Sign up at Registration, Transportation will be provided – Meet in lobby</i> <i>Pick up times: 4:30 PM @ Hutte & 6:30 PM Tour Site</i>
5:30pm – 6:30PM	Pre-Dinner Reception in the Hutte
7:00pm – 9:00pm	Dinner With Awards – Continental Room 4th Floor <i>(Join us for an Evening of dining and entertainment. Prizes will be awarded)</i>
9:00pm – 10:00pm	Evening Reception <i>(Located at the Hutte, across from the Enzian)</i>

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FRIDAY, OCTOBER 10TH, 2015

7:00am - 8:30am	4TH FLOOR, CONTINENTAL BREAKFAST
	ALPINE ROOM (LOWER LEVEL)
8:45am – 9:00am	DAILY CONFERENCE OVERVIEW <i>PRESENTER: CHAD HEATON</i>
9:00am – 10:15am	WASHINGTON STATE AUDITORS (REPORTING AND ONLINE FILING) <i>Presenter: Duane Walz</i>
	BREAK TIME (ROOM CHECKOUT)
10:30am – 11:45am	Washington State Auditors (Performance Center Financial Analysis Tool [FIT]) <i>Presenter: Sherrie Ard</i>
11:45am – 12:00pm	CLOSING CEREMONIES
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)
	Time To Go Home <i>Thanks For Attending, See You Next Year</i>

**** SOFTWARE DEMO'S IN THE HUTTE ****

New Module Demonstrations – Individual demos of the new software modules or any modules are available in the Hutte, across from the Enzian. Sign-up sheets are located at the registration table.

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Wednesday Training Class Schedule

	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
3:00pm – 4:30pm	REPORTING SERVICES <i>PRESENTER: WILL JONES</i>	VISION FINANCIALS <i>PRESENTER: ERIC DELBO</i>	VISION UTILITIES (INTRO) <i>PRESENTER: SHANE O'NEILL</i>	VISION RECEIVABLES & LICENSING <i>PRESENTER: CODY OATMAN</i>	VISION FIXED ASSETS <i>PRESENTER: RYAN BURTEISHAW</i>

Thursday Training Class Schedule

	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
8:30am – 8:45am	DAILY CONFERENCE OVERVIEW IN ALPINE ROOM				
8:45am – 11:00am	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	VISION FORMS & OUTSOURCING <i>PRESENTERS: JORDAN ENGBRETSON</i>	SOFTWARE LABS <i>PRESENTERS: SUPPORT/SALES</i>	PERSONAL TRAINING (SIGN UP) <i>PRESENTERS: SUPPORT</i>	INVOICE CLOUD <i>PRESENTER: CARLYN ALTHEIDE</i>
BREAK TIME					
11:15am – 12:00pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	VISION FORMS & OUTSOURCING <i>PRESENTERS: JORDAN ENGBRETSON</i>	SOFTWARE LABS <i>PRESENTERS: SUPPORT/SALES</i>	PERSONAL TRAINING (SIGN UP) <i>PRESENTERS: SUPPORT</i>	INVOICE CLOUD <i>PRESENTER: CARLYN ALTHEIDE</i>
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)				
1:00pm – 2:45pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	PUBLIC WORKS ROUNDTABLE ASSET MANAGEMENT, BACKFLOW & MOBILE SOLUTIONS <i>PRESENTERS: JOHN/CRAIG/JOE.</i>	SOFTWARE LABS <i>PRESENTERS: SUPPORT/SALES</i>	PERSONAL TRAINING (SIGN UP) <i>PRESENTERS: SUPPORT</i>	INVOICE CLOUD <i>PRESENTER: CARLYN ALTHEIDE</i>
BREAK TIME					
3:00pm – 4:15pm	REPORTING SERVICES <i>PRESENTER: WILL JONES</i>	VISION PAYROLL <i>PRESENTER: ERIC DELBO</i>	VISION UTILITIES (ADVANCED) <i>PRESENTER: SHANE O'NEILL</i>	VISION CASH MANAGEMENT <i>PRESENTER: CODY OATMAN</i>	VISION CEMETERY <i>PRESENTER: RYAN BURTEISHAW</i>

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Friday Training Class Schedule

	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
8:30am – 8:45am	DAILY CONFERENCE OVERVIEW IN ALPINE ROOM				
8:45am – 10:15am	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	ONE2ONE WITH <i>PRESENTERS: CRAIG LODGARD & JOHN ENGBRETSON (SIGN – UP)</i>	SOFTWARE LABS <i>PRESENTERS: SUPPORT STAFF/SALES</i>	PERSONAL TRAINING (SIGN UP) <i>PRESENTERS: SUPPORT STAFF</i>	INVOICE CLOUD <i>PRESENTER: CARLYN ALTHEIDE</i>
	BREAK TIME				
10:30am – 12:00pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	ONE2ONE WITH <i>PRESENTERS: CRAIG LODGARD & JOHN ENGBRETSON (SIGN – UP)</i>	SOFTWARE LABS <i>PRESENTERS: SUPPORT STAFF/SALES</i>	PERSONAL TRAINING (SIGN UP) <i>PRESENTERS: SUPPORT STAFF</i>	INVOICE CLOUD <i>PRESENTER: CARLYN ALTHEIDE</i>
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)				
	Time To Go Home <i>Thanks For Attending, See You Next Year</i>				

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VISION RECEIVABLES/LICENSES

Product Presentation – Share tips & tricks with your peers and view a brief presentation of Vision Receivables with all its new features.

New Product Presentation – Discover all the features and functionalities of Vision Licenses. Options include Business and Pet Licenses as well as B&O Tax Reporting.

VISION FINANCIALS

Architecture and Workflow – Out with the old in with the new, let us show you the new beginnings of your already easy process. Learn the new grids and Capabilities along with building a work flow for your reference. We will wrap it up with some common mistakes that are easy to resolve.

VISION UTILITIES

Utilities Intro – In this class we will be reviewing our Utilities Billing architecture concepts, discussing Properties, Contacts and Accounts. Then we will be going through the steps of the regular billing process.

Utilities Advanced - In this class we will be discussing our aging process, delinquencies, manual Adjustments and my most common support issues.

VISION FORMS & OUTSOURCING

Solutions – Join us for a presentation of what forms we can produce and learn more about our outsourcing solution.

VISION FIXED ASSETS

Product Presentation – How this application is more than just asset tracking, Inventory to Maintenance Scheduling, utilizing new technologies – come see!

VISION CEMETERY

Product Presentation and Training – See all the new features and product presentation and learn how cemetery can enhance your application experiences.

PERSONAL TRAINING

Sign Up at Beginning of Conference – Bring your own software issues, go over procedures and solutions and work one on one with a support specialist.

VISION PAYROLL

Payroll Processing – Master the payroll process and learn how the architecture all comes together to create a flawless routine. Tying tables to components and all the way to the employee. Create a helpful step by step process to assist you in your day to day processing!

Payroll Portal – Employee portal processes, tools and learn how the architecture all comes together

VISION CASH MANAGEMENT

Receipts, Deposits, & Best Practices – From posting Budgetary Receipts to Utility Receipts, then managing all of that hard work you have done by managing each transaction in a deposit! Maybe you have made a mistake, let me show you the ease to fixing your once in a lifetime mistakes!

VISION PERMITTING

New Product Presentation, & Best Practices – From Contacts, Permits, Inspections, Documents, Mapping to Portals. Come see all the new technologies integrated into this full service application.

VISION REPORTING SERVICES

Architecture and Workflow – You will be introduced to the best practices and step by step when designing reports to fully take advantage of the SSRS integration. Introduction to SQL Server Reporting Services (SSRS) training teaches attendees how to create, format, and manage SQL Server Reporting Services reports.

ONE2ONE WITH CRAIG AND JOHN

ASK MANAGEMENT- Sign up for individual sessions to discuss anything Vision. There will be five (5) slots available. Sign-up sheet at the registration table.

INVOICE CLOUD

Carlyn is available to address your Invoice Cloud needs and suggestions. She will be presenting EBPP Solutions and how Invoice Cloud integrates with your agency.

SOFTWARE LABS

Product Presentation – One on One with the product of your choice, see all the new features and see the application at your own pace.

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Presenter Bios

Carlyn Altheide is the Western Regional Manager for Invoice Cloud. Carlyn currently lives in Walnut Creek, California and has a young son who is 16 months old and keeps her on her toes daily! Carlyn has been selling to utility and local government agencies for the past 10 years and her background includes experience with EBPP and Print & Mail Solutions.

Toni Nelson is the new Public Finance Consultant for Municipal Research and Services Center (MRSC), a private non-profit organization that supports local government in Washington through consultation, research, training, and collaboration. Previously, she was the Director of Professional Services for Vision Municipal Solutions a governmental software, hardware and financial services firm located in Spokane, Washington and the "Small Cities Specialist" with the Washington State Auditor's Office where she provided financial consulting services to local government.

Toni's background in governmental accounting is extensive with over twenty-four years in the public sector. She was with the Washington State Auditor's Office for 11 years and 9 years as the Clerk/Treasurer for the Town of Twisp.

Ms. Nelson established a focus for "Cash Basis" accounting and reporting while with the State Auditor's Office that carried into educational classes and on-site training. She authored the "Small Cities Manual", monthly articles for the Financial Advisory web group for MRSC and is a speaker for state organizations such as AWC, WFOA, WMCA, and WMTA on topics pertaining to budgeting, cash basis accounting and reporting and the application of Washington State B.A.R.S. requirements.

Michael Foley is the West Coast Sales Manager for Equus Computer Systems. Michael was born and raised in Renton, WA and currently lives in Maple Valley, WA. Michael has been married to his wife Nancy for 35 years, they have 2 children. Sean owns his own business in Maple Valley and Michelle is a Physical Therapist in Tacoma. He has been in the Computer PC business for 34 years and has been with Equus Computers for the past 14 years.

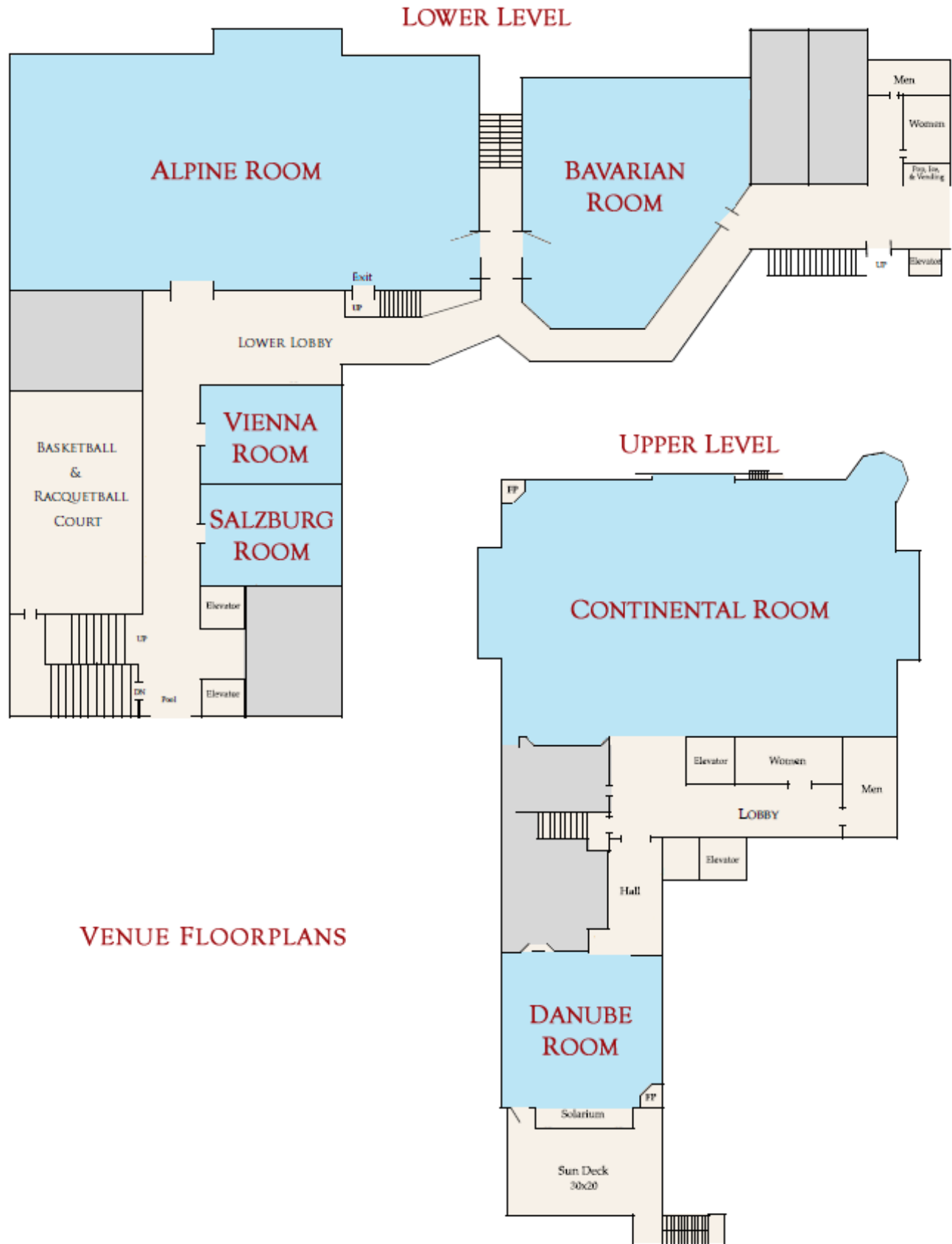
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Sherrie is the Financial Management Specialist for the State Auditor's Office Local Government Performance Center. She works with the Center to provide training, technical assistance and other resources to help local governments improve their performance and effectiveness.

Sherrie has been with the State Auditor's Office for ten years and previously worked as an assistant fraud manager supervising and conducting fraud investigations. Her past experience also includes serving as an assistant audit manager on a local audit team.

Duane Walz joined the State Auditor's Office in 1994 and lives and works in Olympia and is a member of Team Local Government Support. He has played a key role in collecting and maintaining government financial data over the years. He is currently responsible for producing the Local Government Comparative Statistics derived from local government annual reports and is the primary owner of SAO's Online Filing System that was created in FY2011. He also provides technical support and training to a wide variety of local governments. Duane received a Lean Six Sigma Green Belt in 2013.

2015 Conference Agenda



VENUE FLOORPLANS