



Vision Municipal Solutions

# Annual Conference

October 11th – October 13th 2017, Leavenworth, WA

*Welcome to the Vision 2017 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.*

*#Visionfest2017*

# *Early Registration*

*Please join us before all of the fun begins for a cheese & wine reception! Pick up your goodie bag, meet new friends and reconnect with old!*

*When: Tuesday October 10<sup>th</sup> 6:00 PM – 7:30 PM*

*Where: The Hutte (located across the street from the Enzian)*

  
**2017 Conference Agenda**

**WEDNESDAY, OCTOBER 11TH, 2017**

7:00am - 9:00am	<b>4TH FLOOR, CONTINENTAL BREAKFAST</b>	
8:00am - 9:00am	<b>REGISTRATION:</b> <i>See us at the Registration Table inside of the Alpine Room!</i>	
	<b>ALPINE ROOM ( LOWER LEVEL )</b>	
9:00am – 9:15am	<b>DAILY OVERVIEW</b> <i>PRESENTER: RYAN BURTENSHAW</i>	
9:15am – 10:45am	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	
10:45am – 11:00am	<b>BREAK TIME</b>	
11:00am – 12:00pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	<b>Vision’s VISION for Oregon &amp; Idaho</b> <i>SEE SCOTT IN THE BAVARIAN</i>
12:00pm – 1:00pm	<b>LUNCH TIME</b> <b>(4TH FLOOR, CONTINENTAL ROOM)</b>	
1:00pm – 2:30pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	<b>Vision’s VISION for Oregon &amp; Idaho</b> <i>SEE SCOTT IN THE BAVARIAN</i>
2:30 pm – 2:45 pm	<b>BREAK TIME</b>	
2:45pm – 4:15pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	
4:15pm -4:30pm	<b>CLOSING</b> <i>PRESENTER: RYAN BURTENSHAW</i>	
5:00pm – 7:00PM	<b>MINIATURE GOLF TOURNAMENT</b> <b>MEET IN THE LOBBY</b>	
7:00pm – 8:30pm	<b>DINNER BREAK</b> <b>(ENJOY DINING IN LEAVENWORTH)</b>	
8:30pm – 10:00pm	<b>EVENING RECEPTION</b> <b>(LOCATED AT THE HUTTE, ACROSS FROM THE ENZIAN, JOIN US)</b>	



# 2017 Conference Agenda

Wednesday Training Class Schedule					
	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
9:00am – 9:15am	<b>DAILY CONFERENCE OVERVIEW IN ALPINE ROOM</b>				
9:15am – 10:45am	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>				
10:45am – 11:00am	<b>BREAK TIME</b>				
11:00am – 12:00pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>		<b>Vision's VISION for Oregon &amp; Idaho</b> <i>PRESENTER: SCOTT STICKEL</i>		
12:00pm – 1:00pm	<b>LUNCH TIME</b> <b>(4TH FLOOR, CONTINENTAL ROOM)</b>				
1:00pm – 2:30pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	<b>SOFTWARE DEMOS &amp; SALES</b>	<b>Vision's VISION for Oregon &amp; Idaho</b> <i>PRESENTER: SCOTT STICKEL</i>		
2:30pm – 2:45pm	<b>BREAK TIME</b>				
2:45pm – 4:30pm	<b>BARS</b> <i>PRESENTER: DUANE WALZ</i>	<b>SOFTWARE DEMOS &amp; SALES</b>			

  
**2017 Conference Agenda**

**THURSDAY, OCTOBER 12TH, 2017**

7:00am – 8:45am	<b>4TH FLOOR, CONTINENTAL BREAKFAST</b>	
8:00am – 8:45am	<b>REGISTRATION:</b> <i>See us at the Registration Table inside of the Alpine Room!</i>	
	<b>ALPINE ROOM ( LOWER LEVEL )</b>	
8:45am – 9:00am	<b>VISION'S STATE OF THE UNION ADDRESS</b> <i>PRESENTERS: RYAN BURTENSHAW</i>	
9:00am – 9:15am	<b>OPENING CEREMONIES &amp; CONFERENCE OVERVIEW</b> <i>PRESENTERS: SCOTT STICKEL &amp; RYAN BURTENSHAW</i>	
9:15am – 9:25am	<b>VISION PODCAST</b> <i>PRESENTERS: ERIC DELBO</i>	
9:25am – 9:45am	<b>STORY TIME WITH CODY</b> <i>PRESENTERS: CODY OATMAN</i>	
9:45am – 10:15am	<b>CITY PORTAL</b> <i>PRESENTERS: TEAM VISION</i>	
10:15am – 10:45am	<b>VISION IN THE CLOUD</b> <i>PRESENTERS: JOE SAGE, RYAN BURTENSHAW, &amp; BRANDON VOTAW</i>	
10:45am – 11:00am	<b>BREAK TIME</b>	
11:00am – 12:00pm	<b>FINANCIAL POLICIES: WHAT'S REQUIRED AND HOW TO DEVELOP POLICIES FOR YOUR ENTITY</b> <i>Presenters: Toni Nelson</i>	
12:00pm – 1:00pm	<b>LUNCH TIME</b> <i>Vision Speaker: Scott Stickel</i> <b>(4TH FLOOR, CONTINENTAL ROOM)</b>	
1:00pm – 2:00pm	<b>What's New with Vision</b> <i>PRESENTER : SCOTT STICKEL</i>	<b>Breakout Sessions</b> <i>(See Schedule for Classes and Room Assignments)</i>
2:00pm – 2:15pm	<b>BREAK TIME</b>	
2:15pm – 3:15pm	<b>FINANCIALS &amp; PAYROLL REPORT RUNDOWN &amp; SUBSCRIPTIONS</b> <i>Presenters: RYAN BURTENSHAW</i>	<b>Breakout Sessions</b> <i>(See Schedule for Classes and Room Assignments)</i>
3:15pm – 3:30pm	<b>BREAK TIME</b>	
3:30pm – 3:50pm	<b>CITY OF VISION II</b> <i>WHERE ARE THEY NOW?</i>	
3:50pm – 4:30pm	<b>UB2</b> <i>PRESENTERS: CODY OATMAN &amp; ERIC DELBO</i>	
5:00pm – 7:00 pm	<b>The Vision Amazing Race</b> <b>(THE RACE STARTS AT THE HUTTE. PRIZES WILL BE AWARDED DURING THE GALA DINNER)</b>	
7:30pm – 9:00pm	<b>Gala Dinner With Awards – Continental Room 4<sup>th</sup> Floor</b> <b>(JOIN US FOR AN EVENING OF DINING AND ENTERTAINMENT. PRIZES WILL BE AWARDED)</b>	
9:00pm – 10:30pm	<b>Evening Reception</b> <b>(LOCATED AT THE HUTTE, ACROSS FROM THE ENZIAN)</b>	



# 2017 Conference Agenda

Thursday Training Class Schedule					
	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
8:45am – 9:15am	DAILY CONFERENCE OVERVIEW IN ALPINE ROOM				
9:15am – 10:45am	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)				
10:45am – 11:00am	BREAK TIME				
11:00am – 12:00pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	SOFTWARE DEMOS & SALES			PODCAST INTERVIEW (SIGN UP)
12:00pm – 1:00pm	LUNCH TIME (4TH FLOOR, CONTINENTAL ROOM)				
1:00pm – 2:00pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	VISION FINANCIALS <i>PRESENTER: CORBIN DIAL</i>	VISION UTILITIES <i>PRESENTER: CODY OATMAN</i>	VISION CASH MANAGEMENT <i>PRESENTER: COLTON LODGARD</i>	VISION PAYROLL <i>PRESENTER: ERIC DELBO</i>
2:00pm – 2:15pm	BREAK TIME				
2:15pm – 3:15pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	SOFTWARE DEMOS & SALES	PERMITS <i>Presenter: Corbin Dial</i>	LICENSING & TAXES <i>PRESENTER: RYAN BURTENSHAW</i>	CEMETERY <i>PRESENTER: ERIC DELBO</i>
3:15pm – 3:30pm	BREAK TIME				
3:30pm – 4:30pm	MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)	SOFTWARE DEMOS & SALES			

# 2017 Conference Agenda

**FRIDAY, OCTOBER 12TH, 2017**

7:00am - 8:45am	<b>4TH FLOOR, CONTINENTAL BREAKFAST</b>	
	<b>ALPINE ROOM ( LOWER LEVEL )</b>	
8:45am – 9:00am	<b>DAILY CONFERENCE OVERVIEW</b> <i>PRESENTER: CHAD HEATON</i>	
9:00am – 9:35am	<b>VISION IT'S ENHANCED CLOUD SERVICES</b> <i>PRESENTER: BRANDON VOTAW</i>	
9:35am – 9:45am	<b>BREAK TIME</b>	
9:45am – 10:45am	<b>FIXED ASSETS</b> <i>PRESENTERS: JOE SAGE</i>	<b>Breakout Sessions</b> <i>(See Schedule for Classes and Room Assignments)</i>
10:45am – 11:00am	<b>BREAK TIME</b>	
11:00am – 11:30am	<b>VISION TECHNOLOGY</b> <i>PRESENTERS: JOE SAGE</i>	
11:30am – 12:00pm	<b>WHAT'S NEXT</b> <i>PRESENTERS: TEAM VISION</i>	
12:00pm – 1:00pm	<b>LUNCH TIME</b> <b>(4TH FLOOR, CONTINENTAL ROOM)</b>	
	<b>Time To Go Home</b> <i>THANKS FOR ATTENDING, SEE YOU NEXT YEAR</i>	

# 2017 Conference Agenda

Friday Training Class Schedule					
	ALPINE	DANUBE	BAVARIAN	VIENNA	SALZBURG
8:45am – 9:00am	<b>DAILY CONFERENCE OVERVIEW IN ALPINE ROOM</b>				
9:00am – 9:35am	<b>MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)</b>		<b>OPEN SOFTWARE LAB</b>		
9:35am – 9:45am	<b>BREAK TIME</b>				
9:45am – 10:45am	<b>MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)</b>	<b>VISION FINANCIALS</b> <i>PRESENTER: CORBIN DIAL</i>	<b>VISION UTILITIES</b> <i>PRESENTER: CODY OATMAN</i>	<b>VISION CASH MANAGEMENT</b> <i>PRESENTER: COLTON LODGARD</i>	<b>VISION PAYROLL</b> <i>PRESENTER: ERIC DELBO</i>
10:45am – 11:00am	<b>BREAK TIME</b>				
11:00am – 11:30am	<b>MAIN PRESENTATIONS (REFER TO CONFERENCE AGENDA)</b>	<b>SOFTWARE DEMOS &amp; SALES</b>	<b>OPEN SOFTWARE LAB</b>	<b>VISION IT QUESTIONS &amp; INFORMATION</b> <i>PRESENTER: BRANDON VOTAW &amp; FRANK VOTAW</i>	<b>PODCAST INTERVIEW (SIGN UP)</b>
11:30am – 12:00pm	<b>CLOSING CEREMONIES IN THE ALPINE ROOM</b> <b>SEE YA NEXT YEAR!!!</b>				
12:00pm – 1:00pm	<b>LUNCH TIME</b> <b>(4TH FLOOR, CONTINENTAL ROOM)</b>				
	<b>Time To Go Home</b> <i>Thanks For Attending, See You Next Year</i>				

**\*\* SOFTWARE DEMO'S IN DANUBE \*\***

**New Module Demonstrations** – Individual demos of the new software modules or any modules are available in the Danube room. Sign-up sheets are located at the back tables.

**\*\* PODCAST INTERVIEW \*\***

**Podcast Interview** – Eric will take you through how Vision plans to have yet another amazing resource to keep everyone up to speed on various topics. There will be a sign-up sheet for the interviews on Thursday on the back tables.

**\*\* OPEN SOFTWARE LABS\*\***

**Product Presentation** - Come in and join the fun, computers running the software and software support at your fingertips! Bring your questions!



# 2017 Conference Agenda

## **BARS TRAINING**

### ***Budgeting, Accounting, and Reporting System –***

This will be an all-day training session with an auditor containing all you need to know about BARS in your everyday work environment.

## **VISION'S VISION FOR OREGON AND IDAHO**

***Oregon & Idaho Customers*** - Find out what Vision is planning for Idaho and Oregon & help us to better understand the specific needs of our Oregon & Idaho customers.

## **UB2**

***Utility Billing*** – Join us as we demonstrate several of the enhanced features that distinguish the UB2 solution.

## **VISION IN THE CLOUD**

***Cloud Services*** - Learn how to leverage cloud services in a hybrid environment with your very own Vision Software.

## **VISION CITY PORTAL**

***City Portal*** - Connecting your customers to you with just a few simple clicks

## **VISION IT**

***VISION IT'S ENHANCED CLOUD SERVICES*** - Come join us for our discussion on our new and refreshed cloud offerings for 2018

## **FINANCIAL POLICIES**

***Toni Nelson*** - What's required and how to develop policies for your entity.

## **VISION FINANCIALS**

***Financials*** – From logging in, to printing those Checks, Corbin is going to put on one heck of a show

## **VISION UTILITIES**

***Utilities*** – Don't miss this great presentation by one of our Utility Experts. Cody shows us **How To** and **How Not** to do daily tasks in your Billing

## **VISION CASH MANAGEMENT**

***Receipts, Deposits, & Best Practices*** – Climb aboard the knowledge train as one of our Cash Management Specialists conducts you through the Cash Management system start to finish and everything in between. Colton will bring his young witty knowledge in a fun exciting "counter" experience.

## **VISION PAYROLL**

***Payroll Processing*** – Come join one of our Payroll experts. Eric's love of stars will sure shine in this earth moving payroll run through! He will take you through all you need to know in the Payroll Processing system.

## **VISION PERMITS**

***Permits*** – The Permits class will cover everything from building the needed components to successfully run the system to troubleshooting any issues that may come your way.

## **VISION LICENSING & TAXES**

***Business Licenses & B&O*** – No better time than now to get those processes streamlined

## **VISION CEMETARY**

***Cemetery*** – Navigation is this eagle scouts best attribute, Eric is sure to show you best practice in tracking down your lost souls. In the Cemetery training we will go from organizing your grids to entering data.

## **STORY TIME WITH CODY**

***You wont want to miss this!*** – You may want to be sitting down for this one, let Cody bring us all up to speed on his most recent life change and one of the struggles he had to overcome. For those of you who cannot make it due to the break-outs, tune in to our podcast to hear a full recap!!

## **FINANCIALS & PAYROLL REPORT RUNDOWN & SUBSCRIPTIONS**

***What Reports, when & how?*** - In this class Ryan will walk you through best case scenario for what reports to run during what time of the month and even how to have them run on their own

## **VISION FIXED ASSETS**

***Fixed Assets***– Basic tracking, verification, depreciation & maintenance of Fixed Assets.

## **VISION TECHNOLOGY**

***Advanced Features***– Learn about the advanced features in the Vision system that you may not know about or may have forgotten!

## Presenter Bios

**Toni Nelson** is the 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 decades 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. He has been in the Computer PC business for 34 years and has been with Equus Computers for the past 14 years.

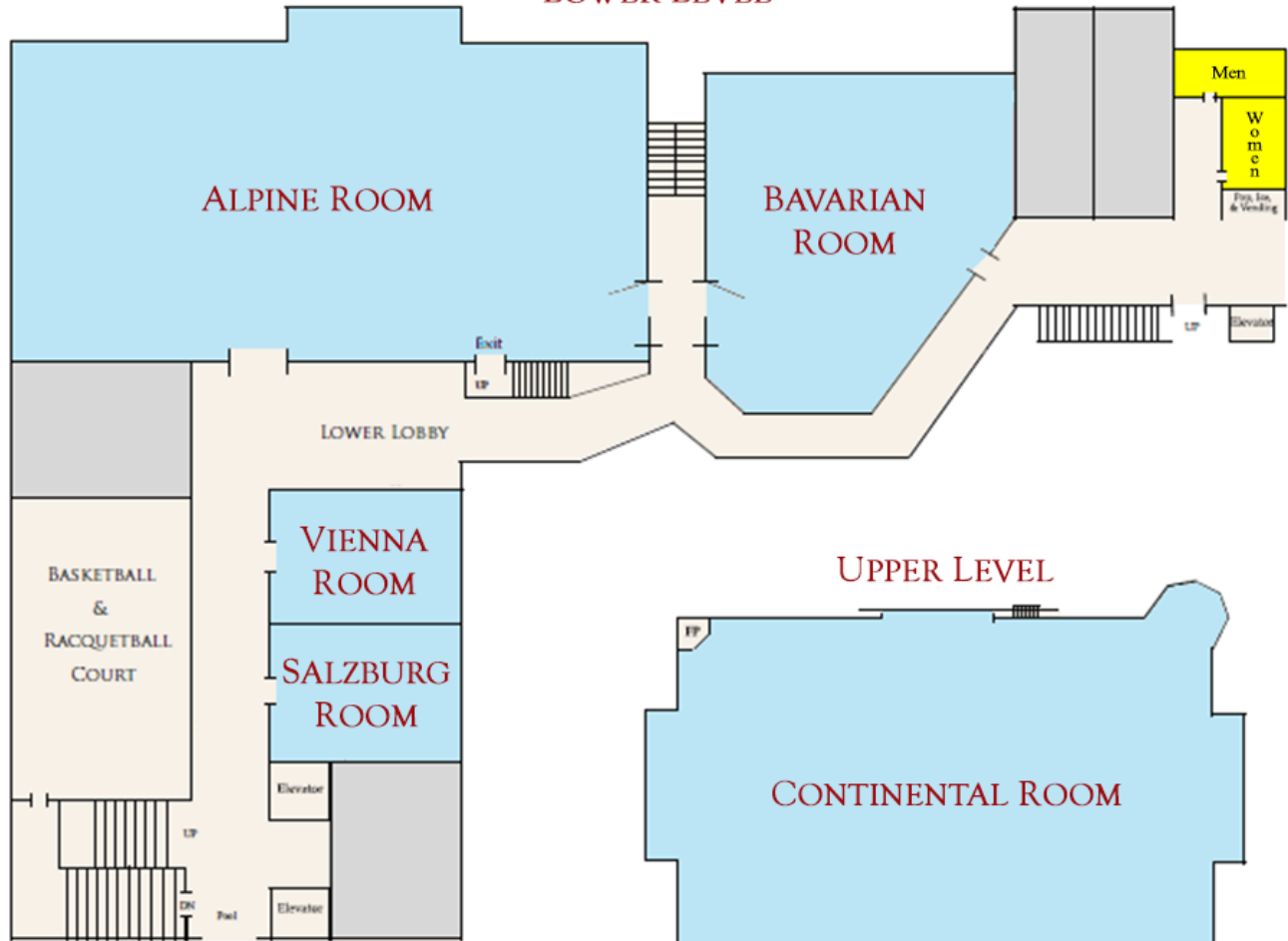
**Duane Walz** joined the State Auditor's Office in 1994 and lives and works in Olympia and is a member of Team Local Government Support. He has played a key role in collecting and maintaining government financial data over the years. He is currently responsible for producing the Local Government Comparative 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.

**Scott Stickel** is the newest member to join the Vision team. Scott brings over 25 years of serving local government.

Scott has come on board to help Vision prepare and plan for future growth. He would like to meet with all of you & what better time than at our annual users conference! Please welcome Scott to our Vision Family!

**2017 Conference Agenda**

LOWER LEVEL



UPPER LEVEL



VENUE FLOORPLANS