

## MONDAY, OCTOBER 3

**Full-Day Training Sessions:** 8:30AM – 4:30PM | **Registration & Breakfast:** 7:00AM – 8:30AM

Executive Workshop: Enterprise Strategy for Content Management

OnBase System Administration

OnBase Reporting

### *Cocktail Hour & Dinner:* 5:00PM

Please join us at Field's Premier Steakhouse, best known for legendary beef, chops, and grilled seafood, conveniently located adjacent to the Wilderness at 511 East Adams Street.

This appreciation event is **complimentary and open to all Conference Attendees.**

## TUESDAY, OCTOBER 4

**Conference Registration & Breakfast:** 7:00AM – 8:30AM

<i>Time</i>	<i>Sandstone Ballroom</i>	<i>Session Room</i>
7:30AM – 8:30AM	Industry Breakfast Session: Healthcare	Industry Breakfast Session: Insurance
8:30AM – 8:40AM	Break	
8:40AM – 9:40AM	General Assembly Customer Presentations	
9:40AM – 9:50AM	Break	
9:50AM – 10:50AM	OnBase: The Latest & Greatest	To BE or Not to BE?
10:50AM – 11:30AM	Expert Stations & Open Discussions	
11:30AM – 12:30PM	Lunch Roundtables	
12:30PM – 1:30PM	Keynote Speaker: Meagan Johnson Zap the Generational Gap	
1:30PM – 1:35PM	Break	
1:35PM – 2:35PM	Special OPS: OnBase Performance & Security	I Love You BOO
2:35PM – 2:45PM	Break	
2:45PM – 3:45PM	Workflow Micro Applications: It's Not Rube Goldberg!	United Nations: Bringing the OnBase World Together
3:45PM – 4:00PM	Closing Remarks & Prizes	

## FULL-DAY TRAINING SESSIONS

### OnBase Reporting

Do you know what tables hold key information from your OnBase solution? Do you wish you could enhance the out-of-the-box OnBase Reports with additional information, or have it presented in a different way? Do you know how to create your own custom queries to get the information you need? This training session will explore all of these topics and provide common sample reports that you will be able to take back to your office and implement immediately. This foundation of information will open limitless possibilities for you to pull the information you need, and be a more effective administrator. We will also look at OnBase's developed reporting solutions, including Business Activity Monitoring and Report Services. The cost for this course is \$99 per attendee for non-tiered support customers, and is free for Naviant tiered support customers.

#### Attendees Will Learn

- Make OnBase Reports Work for You & Create Common Reports You Can Use Immediately
- Create Custom Queries & Review Major Table Structure & Fields
- Find Relevant Data to Make SQL Queries Easy
- Find Total Document Counts within OnBase
- Create Security-Based Reports
- Leverage Transaction Log to Determine Printing/User Load Trends
- Track User Login Information (when was last time a user/workstation logged in)

### OnBase System Administration

Are you new to OnBase or are you looking for a refresher on OnBase System Administration? This intro to System Administration course is designed to introduce new and existing OnBase System Administrators to the use, maintenance and administration of OnBase. The class also investigates effective maintenance strategies and resources available to OnBase System Administrators. Expand upon your OnBase System Administrator knowledge and learn how you can leverage more of the built-in or add-on functionality to streamline your processes and systems. The cost for this course is \$99 per attendee for non-tiered support customers, and is free for Naviant tiered support customers.

#### Attendees Will Learn

- OnBase System Structure
- OnBase Latest Release Features
- Data Storage Basics
- Client Administration
- Automated Processing
- Imaging AutoFill Keyword Sets
- Custom Queries
- Cross-Referencing
- Troubleshooting and System Administration Tasks

### Executive Workshop: Developing an Enterprise Strategy for Content Management

This executive workshop is by invitation only. This session will cover a wide-array of considerations from an executive's perspective, including key components from BPM (business process), ECM (enterprise content), and RM (records). The morning roundtable will focus on higher-level, broad-based strategy creation topics such as why creating a strategy is important, the general concepts and areas of coverage, and delve into strategy creation and keys to successful execution. The afternoon roundtables will provide a deeper dive into areas critical for defining and implementing a content management strategy, including IT Architecture and Infrastructure, Process Modeling and Methodology, Metrics and Reporting, and Records Management. The cost for executives is a \$250 fee per organization (up to 3 staff).

#### Attendees Will Learn

- Discussion on Why an ECM Strategy is Critical
- What Areas Should be Covered in the Plan
- How to Create Your Enterprise Strategy
- Review Key Elements to Successfully Execute the Plan
- Key Areas for Defining & Implementing Plan

## INDUSTRY SESSIONS

### Insurance Industry Session

This vertical-focused session will focus on best practices within the insurance industry while leveraging OnBase. Hyland Software's Ruth Fisk, Worldwide Managing Director of Insurance, will be leading the discussion on leveraging OnBase to help better manage business content, improve productivity, ensure long-term profitability, and above all, provide high level of service to retain customers. Attendees will also review the latest solution enhancements specific to insurance customers.

### Healthcare Industry Session

This vertical-focused session will bring together industry leading experts and current healthcare customers and prospects to discuss specific industry challenges. The focus will be on how technology is the driving force behind achieving "One Patient. One Record", and how similar healthcare organizations are leveraging OnBase enterprise-wide, including hospital, business office (Finance, HR, Credentialing), Clinical, and Administration. Attendees will also review the latest solution enhancements specific to healthcare vertical.

## BREAKOUT SESSIONS

### OnBase: The Latest & Greatest

Always a crowd favorite, this session will cover the latest and greatest changes and enhancements with OnBase 11.0, including the latest Microsoft platforms, integrations with market-leading applications, new modules, improved performance, and more consistent user experience via Unity Client.

### To BE or Not to BE

The goal of Business Excellence (BE) is to improve the overall performance of your business and key processes. This session will review BE principles, tools, and metrics, and discuss how BE practices can be incorporated into your business to help you achieve your business goals. Case studies will be used to demonstrate how organizations of all sizes can utilize the concepts of BE to transform their business.

### Special OPS: OnBase Performance & Security

You have OnBase and use it every day. But is your system optimized? We're not talking about making sure you have a beefy server and plenty of bandwidth. Ensuring you have optimal methods for indexing and retrieving documents, as well as sharing those documents with auditors, business partners, and customers, is the focus of this session. We'll discuss automated capture and indexing methods, in addition to covering techniques for ensuring that the proper content is delivered to those searching for documents quickly and easily. Finally, options for sharing your OnBase-stored content with 3rd parties will be covered, with a focus on document security and distribution methods.

### I Love You BOO

Back Office Operations (accounting/finance, human resources, legal, customer service and compliance) don't contribute to the bottom line and are a waste of time. Wrong! As departments continue to be challenged to do more with less, ECM and BPM best practices are critical to optimizing performance. This session will provide an overview of common ways to replace inefficient, paper-based processes and information silos by leveraging enterprise technologies. Tangible benefits of automating your BOO with OnBase include the ability to:

- Reduce the time and cost of performing important business functions
- Improve organizational efficiency
- Share content with employees, business partners, customers and other constituencies
- Address the need for regulatory compliance through the management and control of content

## **Workflow Micro Applications: It's Not Rube Goldberg!**

Time is precious. Are your business processes more complex than they need to be? Do you manually collect, sort, and route information before you begin your real work? If so, then this Micro Applications session is for you! Micro Applications are lightweight application extensions that allow easy consumption of data, when and where you need it, and can deliver targeted information and functionality based on role, requirement and channel of choice (mobile, imbedded, or desktop). This class will expose you to several Micro Applications utilizing Workflow that can add value to your organization by simplifying and automating repeatable tasks. We will walk you through Micro Application concepts and examples that should spark ideas on how you can streamline your business process, and have actual customers share personal success stories. At the end of the session you will have a basic understanding of how Micro Applications can save your workforce time and your organization money.

## **United Nations: Bringing the OnBase World Together**

Do you have disparate line-of-business systems that you wish leveraged the power of OnBase? This session will review integration options that keep users in their "comfort zone" of their existing applications (SharePoint, Outlook, Portals...). New with OnBase 11.0, Enterprise Integration Server (EIS) allows bi-directionally exchange of both documents AND data between OnBase and LOB applications without custom programming (EIS is now to IT what Application Enabler is to users). In addition to touching on other integration tools, we will also leverage a customer case study focused on integration between OnBase and their CRM platform.

## **EXPERT STATIONS**

Back by popular demand, the hands-on Expert Stations will be hosted by Naviant, and provide the opportunity to have one-on-one discussions and demonstrations about some of the most popular solutions, which are outlined below.

- o Accounts Payable / Receivable
- o Contract Management
- o Customer Service
- o Human Resources
- o SharePoint Integration

## **KEYNOTE ADDRESS**

### **ZAP THE GAP: How to Solve the Multi-Generational Puzzle**

*By Meagan Johnson, Generational Humorist*

Right now is an exciting time. We have four 'generational flavors' in the work-place at the same time, and each generation has very unique wants, needs and desires. With each generation, there is an opportunity to learn new perspectives and gain fresh ideas, and also the potential for complete communication failures that could lead to disaster. In this hilarious keynote, we will learn how different generations think, perform and interact at work, and we'll discover new ways to tap into each generation's motivations and understand our differences so one day we can realize one another's greatest potentials.

## **CONFERENCE CENTER & HOTEL INFORMATION**

The Conference will be held this year at the Wilderness Resort & Waterpark located at 511 East Adams Street in Wisconsin Dells, WI. Overnight accommodations are available at the Wilderness at the Naviant preferred rate of \$115.00 by calling 800.867.9453 and using Block #223661. Come early and bring your family to enjoy the spectacular indoor waterpark and golf course at the Wilderness, and the nearby world-renowned Sundara Spa. Special Conference rates are extended for the weekend (\$99 Friday / \$115 Saturday & Sunday).