



Agenda

Wednesday, February 3rd 2016

Highlights of the day:

Jet Reports, CRM and ERP Training Sessions (Optional)

Welcome Reception for all attendees and sponsors

8:00am – 8:30am	Breakfast & Registration in Wellington Foyer	
	Wellington A	Wellington B
8:30am – 12:30pm	Jet Reports	CRM: Business Processes, Workflows, and Best Practices for Making the Best of CRM Information
12:30pm – 1:00pm	Lunch	
1:00pm – 3:00pm	Jet Reports	ERP: Security Permissions Administration for NAV and WebApps
3:00 – 3:15pm	Break	
3:15pm – 4:15pm	Jet Reports	ERP: Security Permissions Administration for NAV and WebApps
5:30pm – 7:00pm	Welcome Reception in Hotel Lobby Bar	

Thursday, February 4th 2016

Highlights of the day:

To be announced featured keynote

Tech Lounge, Technology Premieres & Training Sessions, 20mins with a Pro & Tech Dev Lab

Customer Awards Gala

7:30am – 8:00am	Registration & Breakfast					
8:00am – 8:30am	Welcome Keynote from Altus Dynamics					
8:30am – 9:15am	Featured Keynote					
9:15am – 9:30am	Travel Time					
	3 rd Floor			10 th Floor		
	Screening Room	Stewart Boardroom	Wildflower Club	Suite 1005	Suite 1004	Penthouse
	Technology Premieres	Boardroom Brainstorm	Tech Lounge & Demos	Beyond The Product	Become a Product Pro	20mins with a Pro
9:30am – 10:30am	Announcing NAV 2016	How Technology Can Improve Your Employee Acquisition, Engagement & Retention	Prospective, Active, and Alumni Students within Dynamics CRM	Using Role Centers to Improve Efficiency	Advanced CRM Tips & Tricks	20mins with a Pro booked sessions
10:30am – 11:00am	Break in the Tech Lounge					
11:00am – 12:00pm	What's New and Coming Up in Altus Finance	How to Build Deeper Relationships with Your Stakeholders in Today's Digital World	New to CRM? Top 10 Things You Need to Know	WebApps for Expenses and Procurement	Advanced HR and Payroll Tips & Tricks	20mins with a Pro booked sessions
12:00pm – 1:00pm	Lunch and Customer Panel: Best Practices in getting high user adoption of your technology					
1:00pm – 2:00pm	What's New and Coming Up in Altus HR & Payroll	Building a Bullet-Proof Proposal for Technology Project Funding	Customize Your Purchase Orders and Receipts Using Word Inside NAV!	Optimize Your Organization's Fundraising with Dynamics CRM	Best Practices: Introducing EFT to Your Organization	20mins with a Pro booked sessions
2:00pm – 2:10pm	Travel Time					
2:10pm – 3:10pm	What's New and Coming Up in CRM	How to Wake Up From Business Process Nightmares	Optimize Your Workforce with Advanced Scheduling	Budget Verification Best Practices	Sales Tax Setup and Maintenance	20mins with a Pro booked sessions
3:10pm – 3:40pm	Break in the Tech Lounge					
3:40pm – 4:40pm	What's New and Coming Up in Donor Engage	Project Success Begins with Management	New to NAV? Top 10 Things You Need to Know	Fixed Asset Management	Payroll Allocations	Tech Dev Lab
5:30pm – 7:00pm	Customer Awards Gala in the Exclusive Rooftop Lounge					

Friday, February 5th 2016

Highlights of the day:

Industry Networking Breakfast

To be announced featured keynote

Tech Lounge, Technology Premieres & Training Sessions

20mins with a Pro

7:30am – 8:15am	Industry Networking Breakfast					
8:15am – 9:00am	Featured Keynote					
9:00am – 9:15am	Travel Time					
	3 rd Floor			10 th Floor		
	Screening Room	Stewart Boardroom	Wildflower Club	Suite 1005	Suite 1004	Penthouse
	Technology Premieres	Boardroom Brainstorm	Tech Lounge & Demos	Beyond The Product	Become a Product Pro	20mins with a Pro
9:15am – 10:15am	What's New and Coming Up in Client Engage	The "Need to Know" About Transitioning From On-Premise to the Cloud	Extreme Business Process Makeover	Is Your Dashboard a Picasso?	Position Management and HR Requests	20mins with a Pro booked sessions
10:15am – 10:45am	Break in the Tech Lounge					
10:45am – 11:45am	What's New and Coming Up in Altus Analytics	How to Plan a Pain-Free Upgrade	Revolutionizing Accountability: 3 Tips to Make Performance Based Budgeting a Reality	Understanding Purchase Order Commitments Management	Connecting Dynamics CRM and Social Media	20mins with a Pro booked sessions
11:45am – 11:55am	Travel Time					
11:55am – 12:55pm	Repeat Session of our most popular Technology Premiere	The Hot Debate: To go or not to go to the Cloud	Optimize Your Staff Expense Processing with Expense Claim WebApps	Customize Your Communication Using CRM Data	Advanced NAV Tips & Tricks	
12:55pm – 1:05pm	Travel Time					
1:05pm – 1:15pm	Closing Remarks in Wellington Ballroom Lunch to go					

Session Descriptions:

Paid Training (Optional):

Jet Reports Level I

Are you tired of searching for data? In this training session we will teach you how to start creating reports based on topic, without having to know where the data is located using Jet Reports. We will also show attendees how to use Jet Reports to visualize data in colorful charts and graphs, perform ad hoc analyses on large volumes of data with no programming skills required, and how to receive instant results – no more waiting for reports to run!

CRM: Business Processes, Workflows and Best Practices for Making the Best of CRM Information

Learn how to make the best use of information in CRM from Altus' Application Consultants. Attendees will be shown how to utilize the Business Process and Workflow functionality to help end users and standardize processes. We'll also cover how to improve the user experience to find and extrapolate information. Key topics that will be covered in the session include CRM Business Process Flows, Workflows, Dashboards, Views and searching.

ERP: Security Permissions Administration for NAV and WebApps

An enterprise business solution must have a built-in security system that helps protect your database and the information that it contains from unauthorized access. It must also allow you to specify what authorized users are allowed to do in the database, such as what data they can read and modify. Learn how to define and maintain permissions in Dynamics NAV. In this session we will walk you through the different tools for managing security and accountability in the application, and will also train you how to setup security permissions.

Technology Premieres:

Announcing NAV 2016

Attend this session to see what NAV 2016 looks like and what new features are available from Microsoft. See key features in action as we demo the exciting new functionality!

What's New and Coming Up in Altus Finance

Attend this session to see what is new in ERP Finance since our last Altus Alliance. We will highlight new features, demo key items, and talk about what we are working on next.

What's New and Coming Up in Altus HR & Payroll

Attend this session to see what is new in HR and Payroll. We will highlight new features, demo key items, and talk about what we are working on next.

What's New and Coming Up in CRM

With Dynamics CRM 2015 organizations now have a wealth of new functionality within the core solution. Come and see the new tools that can help to increase efficiency, reduce customization, and improve user adoption.

What's New and Coming Up in Client Engage

The latest solution from Altus Dynamics helps to manage all client data within a single database. Medical, contact, services, and program data can be stored and connected within Dynamics CRM, reducing the Excel and paper based processes currently in place.

What's New and Coming Up in Donor Engage

Check out our latest updates and how Donor Engage can help you increase donors, boost retention, convert constituents, and improve fundraising effectiveness.

What's New and Coming Up in Altus Analytics

Attend this session to see what is new for Altus Analytics. We will highlight new features, demo key items, and talk about what we are working on next.

Boardroom Brainstorms:

How Technology Can Improve Your Employee Acquisition, Engagement & Retention

Looking to improve employee acquisition, engagement, and retention at your organization? Attend this session and learn how to reap the benefits that technology creates within these facets of your organization.

How to Build Deeper Relationships with Your Stakeholders in Today's Digital World

In today's digital world, there are so many new ways an organization can connect with their stakeholders. Join our Director of Marketing, Melissa Alvares, as she shares how to reinvigorate and personalize email, utilize social media the right way, and create content that tells your story in a way that captures your audience. We will use examples from leading organizations as well as give you a sneak peek into what we do here at Altus.

Building a Bullet-Proof Proposal for Technology Project Funding

Thinking of an upgrade? Expanding your solution? Adding new functionality? Moving to the Cloud? This session will cover the 8 simple steps you need to take to build a proposal to get your next technology project funded.

How to Wake Up From Business Process Nightmares

Attend this session to hear real-world examples, straight from the company source, of how your peers have dealt with broken processes, overcoming technical and business issues along the way, as they implemented process automation. This interactive session will include a roundtable discussion of how non-profits and educational institutions have gone from the stone-age to the digital age.

Project Success Begins with Management

Join us in this session to learn how Project Management can help make your projects more successful and learn some very interesting project management facts and myths that might surprise you.

The "Need to Know" About Transitioning From on Premise to the Cloud

Are you considering moving your NAV or CRM solution to the cloud? This session will walk you through the steps you'll need to take to make sure it's the right decision, get your organization ready, and build a project plan to ensure that the move is a success.

How to Plan a Pain-Free Upgrade

With the fast innovative pace of today's technology, you are likely to upgrade every 2 to 3 years. Attend this session to determine the right timing, the right plan for going forward, and what upgrade option will work best for your organization. Both the Evergreen upgrade plan and the traditional upgrade method will be discussed.

The Hot Debate: To go or not to go to the Cloud

With Microsoft's announcement of their new Canadian Datacenter, the Cloud is now a viable option for many organizations who can't have their data leave the country. With location being one important criteria, what are all of the other considerations you should account for when deciding whether or not to move to the Cloud? Attend this session to join the hot debate and discuss this issue with experts and your colleagues.

Tech Lounge & Demos:

Prospective, Active, and Alumni Students within Dynamics CRM

Process Standardization, Student Intake, and Increased Student Communication are just some of the many capabilities of Dynamics CRM when managing prospective, active, and alumni students. Attend this session to learn more.

New to CRM? Top 10 Things You Need to Know

Considering Dynamics CRM for your organization? Attend this session to begin your planning and learn the most important things about the software.

Customize Your Purchase Orders and Receipts Using Word within NAV

Have you ever considered that every time you send out a purchase invoice, receipt or invoice from NAV, it's an opportunity to leverage your marketing and communications strategies? Are you missing a chance to promote fundraising or provide other communications? Does those document really reflect your branding? It's not at all easy to make changes to document layouts in NAV. Until now! Jet Reports will demonstrate Jet Express for Word and show you how you can create custom documents in Word for use in NAV. And, the best part? Jet Express for Word is FREE if you are on NAV 2015.

Optimize Your Workforce with Advanced Scheduling

Understand the latest capabilities of Altus Dynamics Advanced Scheduling including, the staff members involved in the process, the steps in the process, and the features and functions available.

New to NAV? Top 10 Things You Need to Know

Come to this session if you are a new user of Dynamics NAV and want to understand some of the basic things you need to know to successfully get started.

Extreme Business Process Makeover

Bring your worst nightmare, your most challenging business process, to the KwikTag demonstration and see how we can help reduce steps, eliminate paper and save money. From quick and easy document tagging and capture, to workflow and approval routing that literally gives you hours, days and weeks back in your work life, KwikTag integrates directly with your Microsoft Dynamics NAV system. Come see the demo and challenge us to put it to work for you!

Revolutionizing Accountability: 3 Tips to Make Performance Based Budgeting a Reality

Whether you are government, non-profit or educational organization, the term "Performance-Based budgeting" has probably started to creep into your organization's vocabulary. The trend of requiring this type of budgeting in order to get funding for programs is on the rise. Join Questica as they demo the best ways to introduce this type of budgeting at your organization. You'll walk away from the session understanding how to better assign the metrics that matter.

Optimize Your Staff Expense Processing with Expense Claim WebApps

Are you finding your staff expense processes increasingly inefficient? Say no more! Join this session and learn how to optimize your staff expense processing with Expense Claim Web Apps.

Beyond the Product:

Using Role Centers to Improve Efficiency

Attend this session for a deeper understanding on how and when to use Role Centers effectively at your organization.

WebApps for Expenses and Procurement

Altus Dynamics Employee WebApps will empower your employees to interact with data in a focused way, tied to specific tasks or procedures they are responsible for. In this session, we will cover how WebApps allows employees to make purchase, expense, and payment requests, all while reducing paperwork and data entry errors. If you're ready to forget the errors of yesterday and facilitate employee empowerment for tomorrow, attend this session!

Optimize Your Organization's Fundraising with Dynamics CRM

Altus Dynamics' Donor Engage has grown substantially in the last year. Come see the new functionality and how your organization can benefit from streamlined fundraising functionality.

Budget Verification Best Practices

Attend this session for a discussion on the best practices around setting up and using Budget Verification for Altus Dynamics WebApps.

Fixed Asset Management

Dynamics NAV Fixed Assets, if setup and implemented correctly, can reduce the effort needed to account for fixed assets to almost non-eventful. Get rid of the horror of that Excel spreadsheet and make the auditors smile!

Is Your Dashboard a Picasso?

Having too many KPI's and/or a cluttered dashboard is worse than none at all. Join Janice Taylor from Jet Reports to discuss effective KPI's and dashboards that cause action, not confusion. Janice is a recent past Board Treasurer for a large nonprofit. Under her leadership, board reporting changed from 69 pages of financial reporting to a 2 page dashboard. The result? The treasury board finally understood the numbers and took action! In a prior career, Janice also worked for 13 years providing board reporting in an educational institution. Janice has been with Jet Reports since 2007 helping customers turn data into actionable information.

Customize Your Communication Using CRM Data

In the digital age, your organization is responsible for large amounts of data from various sources. In this session, learn how to use this information to better serve your clients through custom communication.

Understanding Purchase Order Commitments Management

Attend this session for a deep dive into Commitments Management and the Detail Commitment Ledger.

Become a Product Pro:

Advanced CRM Tips & Tricks

Current Dynamics CRM users should attend this session to review tips and tricks on how to become more efficient in their day to day use of CRM.

Advanced HR and Payroll Tips & Tricks

Attend this session to get a broader understanding of a variety of the capabilities of the solution for Payroll Controls and Advanced HR features.

Best Practices: Introducing EFT to Your Organization

Never heard of or new to using Electronic Funds Transfer (EFT)? In this session we will discuss the best practices that will allow you to easily introduce and use EFT at your organization.

Sales Tax Setup and Maintenance

Attend this session for a better understanding of how to effectively set up and maintain Sales Taxes in the solution.

Payroll Allocations

This session will give participants a deeper understanding of the capabilities of Payroll Allocations and how Allocations can be used for Assignments or Payroll controls.

Position Management and HR Requests

Attend this session to gain a deeper understanding of how to architect and set up Jobs and Positions as well as how to maximize what you can do with HR Requests.

Connecting Dynamics CRM and Social Media

With the ever-increasing rise of social media, it's more important than ever for organizations to connect with constituents through new media. Social Engagement allows organizations to review and interact directly through Dynamics CRM. Come see the new solution in a live environment and how you can stay closer with constituents.

Advanced NAV Tips & Tricks

Attend this session to learn about a variety of advanced tips and tricks for using Dynamics NAV and the Altus solution, including using Word Document Reporting functionality.