



Transforming the way you work



2017 Civica CMI User Conference

October 15-17, 2017

The Blackwell Inn and Pfahl Conference Center
2110 Tuttle Park Place
Columbus, OH 43210

Disclaimer: All content in this program is subject to change and despite our best efforts, the program may contain errors. We reserve the right to change, modify, alter, or substitute content and/or presenters to deliver the best quality content possible.

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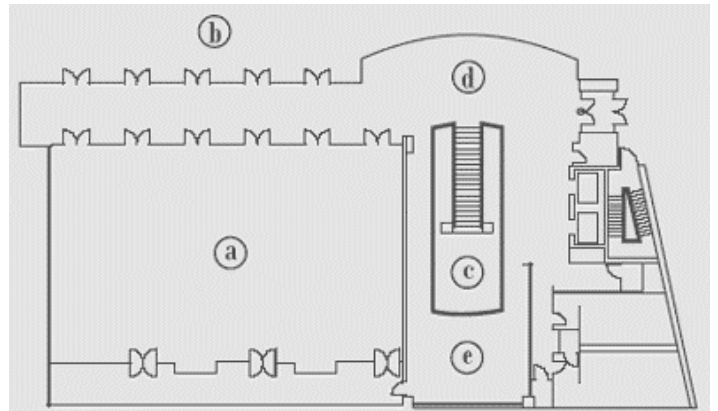
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Conference Floor Plan

Below you will find the floor plans as provided by The Blackwell Inn and Pfahl Conference Center.

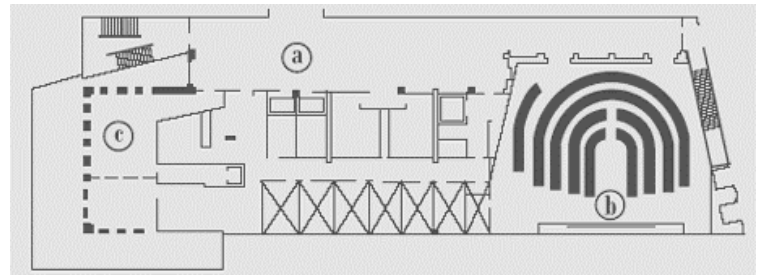
Galas and Gathering Plaza Level Floor plan

- a. Ballroom (will be split into A, B, & C for sessions)
- b. Outdoor patio
- c. Stairs from hotel lobby
- d. Pre-function space – Registration area
- e. Stadium view dining area



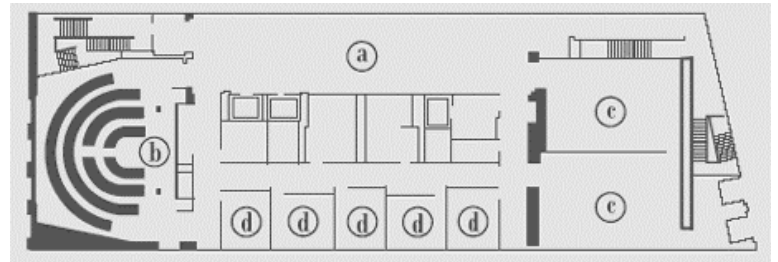
Pfahl Conference Center First Level Floor plan

- a. First Floor Break Area – Snack area
- b. Pfahl 140
- c. Executive Boardroom



Pfahl Conference Center Second Level Floor plan

- a. Second Floor Break Area
- b. Pfahl 202
- c. Pfahl 230 Lab
- d. Pfahl 240



Have a social media account? Post about your conference experiences using [#2017BetterTogether](#)

Conference Menu

Throughout the entire conference, you'll be treated to the best gourmet cuisine from the talented culinary staff of The Blackwell Inn. Here, we're highlighting the main menu options for your convenience:

Sunday Dinner on the Patio – (\$10 charge for attendees)

Buckeye Nation Tailgate. Includes slaw with Julienne vegetables; cubed fruit coupes with berry and mint accents; pulled chipotle braised pork sandwiches on petite white rolls; Monterey ranch chicken and pepper-jack whole wheat sliders; baked macaroni and cheese; broccoli, cauliflower and red bell peppers; classic Ohio buckeyes; lemon-blueberry bars; and chewy chocolate brownies.



Monday Breakfast in the Ballroom – (no cost to conference attendees)

Classic Beginning. Includes mini muffins; croissants and Danish pastries served with whipped butter; assorted sliced fruit with seasonal berries; scrambled eggs, country sausage links, hickory-smoked bacon and Yukon gold and sweet potato hash; crimson cup gourmet coffees and organic tea sachets; bottles of orange juice; apple juice; V-8; and grapefruit juice.

Monday Lunch in the Ballroom – (no cost to conference attendees)

Manhattan Deli. Includes 5 onion soup, Gruyere croutons, crisp broccoli slaw, cabbage, julienne vegetables, dried cranberries, citrus vinaigrette, Roast turkey breast, Roast beef sirloin, smoked sugar baked ham, genoa style salami, capicola, white cheddar, smoked gouda, big eye Swiss, relishes, condiments, sliced breads, white and wheat rolls, kettle chips, warm bread pudding, chocolate hazelnut clusters and house baked cookies.



Monday Evening Dinner in the Ballroom – (no cost to conference attendees)

Guest's choice of the following entrees: Smoked Beef Brisket, Chicken Saltimbocca, Seared Salmon, or Vegetarian Eggplant Rolotini. All guests may enjoy the baked potato bar and the sheet cake for dessert.

Tuesday Morning Breakfast in the Ballroom – (no cost to conference attendees)

Continental Delight. Freshly baked mini muffins, croissants, and Danish pastries served with whipped butter. Assorted sliced fruit with seasonal berries, miniature cheese and hard boiled eggs. Gourmet coffees, organic teas, and bottles of orange, apple, grapefruit and V8 juices.

Tuesday Afternoon Lunch in the Ballroom – (no cost to conference attendees)

East Coast Buffet and Cupcake buffet. The lunch buffet consists of roasted chicken, batter fried cod, clam chowder, roasted potatoes, seasonal vegetables, and of course a full buffet of cupcakes for dessert.

Conference Schedule

Sunday, October 15, 2017 Activities

Time	Session	Room
2:00pm - 3:00pm	Wine and Canvas Painting (\$35 per attendee)	Pfahl 240
6:00pm - 8:00pm	Dinner on the Patio	Patio
6:00pm - 8:00pm	Free caricatures on the patio	Patio
8:00pm - 12:00am	Lounge is open with cash bar	Lounge

Meal, Entertainment and Breaks Schedule (all tracks, both days)

Time	Session	Room
Monday		
7:30am - 9:30am	Registration, Breakfast and Opening Session	Grand Ballroom
12:00pm - 1:00pm	Lunch	Grand Ballroom
2:30pm - 3:30pm	Ice Cream Social	Patio
7:00pm - 9:00pm	Dinner and Entertainment	Grand Ballroom
Tuesday		
8:00am - 9:30am	Breakfast	Grand Ballroom
12:00pm - 1:00pm	Lunch	Grand Ballroom

Horizontal Sessions (sessions appropriate for any attendee, both days)

Time	Session	Room
Monday		
9:30am - 11:20am	ALICE - Active Shooter Preparedness Training presented by Logan Laux	Pfahl 140
10:00am - 10:50am	Cyber Security presented by SA Justin Root of the Ohio BCI	Grand Ballroom C
1:30pm - 2:20pm	Vantage Point presented by James Kelt of GTG	Grand Ballroom C
4:00pm - 4:50pm	Cyber Security presented by a Bryan Pearson	Grand Ballroom C
Tuesday		
10:00am - 10:35am	Introduction to Authority Easy Pay presented by Chuck Layman	Grand Ballroom C
10:45am - 11:20am	Payment Security presented by Chuck Layman	Grand Ballroom C
1:30pm - 3:20pm	ALICE - Active Shooter Preparedness Training presented by Logan Laux	Grand Ballroom C
3:30pm - 4:05pm	Introduction to Authority Easy Pay presented by Chuck Layman	Grand Ballroom C

Horizontal Session Descriptions

ALICE Training – Active Shooter Preparedness

Learn how to ensure your facility is prepared for an active shooter scenario. Instructor Logan Laux shows you how to prepare and react for the best possible outcome.

Cyber Security

Learn how to avoid fraud and scams within your organization or personal life. Using these guidelines, your online experiences will be safer.

Vantage Point – We Have Data, What Can We Do With It?

GTG is our Safety line partner. Their product Vantage Point is a mapping solution for Crime Statistics, 9-1-1 mapping, Automatic Vehicle Locating (AVL), and shows where Fire/Police calls are occurring on a map. It can also be used to show map layers of water lines, business locations, centerlines, corporation limits, and more. Come see a demo of how to unlock your data and graphically display it.



Introduction to Authority Easy Pay

Come and learn about Civica CMI's newest product – Authority Easy Pay! It's been designed to provide your clients with an easy, secure portal to pay for fees online.

Payment Security

Learn how you can ensure that your customer's (and your) data stays secure. Session will also discuss trends in the payment industry.

Finance & Payroll Schedule 💰

Time	Session	Room
Monday		
9:30am - 10:20am	Financial Applications Roadmap – Nancy Jerkes	Pfahl 230
10:30am - 11:50am	Authority (Finance and Payroll) Report Writer (ARW) Lab – Stephanie Shaffer	Pfahl 230 
1:00pm - 2:20pm	Authority Finance Requisition Routing Steering Committee – Nancy Jerkes and Stephanie Shaffer	Pfahl 140
3:30pm - 4:50pm	Finx/Payx Tips and Tricks/Best Practices – Nancy Jerkes, Stephanie Shaffer and Debi Heiligenberg	Pfahl 140
Tuesday		
9:30am - 11:20am	Authority Finance/Payroll Tips and Tricks/Best Practices- Nancy Jerkes, Stephanie Shaffer, and Jessica Gibson	Pfahl 140
1:00pm - 2:20pm	Finx/Payx User Defined Reports (UDR) Lab – Nancy Jerkes	Pfahl 230 
3:00pm - 3:50pm	All Finance/Payroll - Affordable Care Act (ACA) & End of Year (EOY) – Nancy Jerkes and Jessica Gibson	Pfahl 102

Finance & Payroll Session Descriptions 💰

Financial Applications Roadmap

Discussion of the direction of the Authority Finance and Payroll products. Review of last year's roadmap and plans for coming year.

Authority Finance Requisition Routing Steering Committee

Come be a part of designing the new Requisition Routing module. Bring your ideas and requirements and help us create the best tool to handle your requisitions needs.

Finx/Payx Tips and Tricks / Best Practices

Finance Client/Server and Payroll Client/Server customers won't want to miss this session if they want to learn the latest and greatest tips and tricks to use to make your workflow even more efficient. Learn the best practices for conducting tasks within Civica CMI's Finance applications. Topics covered will include the Pcard interface and Form 6.

Authority Finance/Payroll Tips and Tricks / Best Practices

In this session, you'll learn the best tips and tricks to make working Authority Finance, Payroll, and Fixed Assets even more efficient. Some of the topics covered will include shortcuts; navigation; imports of timesheets and receipts; using drilldowns, and walk-throughs of screens and navigation.

All Finance/Payroll - Affordable Care Act (ACA) & End of Year (EOY)

Get a head start on end-of-year processes and requirements by attending this session.

Finance Labs


Authority (Finance and Payroll) Report Writer (ARW) Lab

Introduction to the basic skills and functions of Authority Report Writer. You will learn how to create reports in Authority Report Writer. Instruction on how to create groups and how to use them will be covered.

Finx/Payx UDR Lab

Instruction will include the basic skills and functions of User Defined Reports in FINX. The goal after instruction will be for you to know how to create the on-demand reports you need.

Justice and Court Schedule

Time	Session	Room
Monday		
10:30am - 11:50am	Court End of Month Procedures – Christy Lorenzetti	Grand Ballroom A
1:30pm - 2:20pm	Court Products Roadmap – Logan Laux and Vladimir Oselsky	Grand Ballroom A
3:30pm - 4:20pm	Trusteeship – Karson Haynes	Grand Ballroom A
3:30pm - 4:50pm	Court User Defined Reports (UDR) Lab – John Purinton	Pfahl 230 
Tuesday		
10:00am - 10:50am	Court Round Table – John Purinton	Grand Ballroom A
1:30pm - 2:20pm	Civil Accounting – Karson Haynes	Grand Ballroom A
2:30pm - 2:50pm	E-Citations (Police) – John Purinton	Grand Ballroom B
3:00pm - 3:20pm	E-Citations (Court) – John Purinton	Grand Ballroom B
3:30pm - 4:20pm	Positive Pay – Christy Lorenzetti	Grand Ballroom A

Justice and Court Session Descriptions

Court End of Month Procedures

Prepare for End of Year processes by participating in this review of procedures session.

Court Products Roadmap

Discussion of the direction of Court Products. Followed by an open forum product discussion.

Trusteeships

A look at how courts can now track their Trusteeships in Authority Civil.

Court Round Table

Use this opportunity to share enhancement ideas and discuss current issues with Civica CMI staff.

Civil Accounting

A crash course in setting up Money-In-Codes, including Fund and Objects.

E-Citations (Court)

Learn how to send your citations to the state through Authority RMS and how the courts can import those tickets.

Positive Pay

This session features a discussion on “What is Positive Pay and how can it help my Court against fraud?”

Justice and Court Labs

Court User Defined Reports (UDR)

Learn to create your own User Defined Reports in Civica CMI Court products.

Public Safety Schedule

Time	Session	Room
Monday		
10:00am - 10:20am	Safety Roadmap – Mike Wick and John Purinton	Grand Ballroom B
10:30am - 11:20am	What's New in Safety Products – Mike Wick	Grand Ballroom B
3:30pm - 4:20pm	The Next Generation of RedHawk and RMS – Mark Jordan	Grand Ballroom B
Tuesday		
10:30am - 11:20am	Round Table Discussion – Mike Wick and John Purinton	Grand Ballroom B
1:30pm - 2:20pm	Round Table Discussion (continued)	Grand Ballroom B
2:30pm - 2:50pm	E-Citations (Police) – John Purinton	Grand Ballroom B
3:00pm - 3:20pm	E-Citations (Court) – John Purinton	Grand Ballroom B

Public Safety Session Descriptions

What's New in Safety Products

Attend this session to see demonstrations of all of the new enhancements and abilities in Authority Safety products.

Safety Roadmap

Discussion about the direction of Civica CMI Safety Products. Includes discussion on innovation and research into future needs.

The Next Generation of RedHawk and RMS

Come join us to learn the future of these valuable Public Safety products. In addition, attendees will be provided the opportunity to have input into the feature sets of the software.


Round Table Discussion

Use this opportunity to share enhancement ideas and discuss current issues with Civica CMI staff.

E-Citations (Police)

Learn how to send your citations to the state through Authority RMS and how the courts can import those tickets.

Tax Schedule

Time	Session	Room
Monday		
9:30am - 10:20am	Authority Tax Roadmap – Tami Tyner, Vladimir Oselsky	Pfahl 240
10:30am - 11:50am	Tax Side-by-Side – Alex Hope, Shelli George and Tami Tyner	Pfahl 240
1:00pm - 1:50pm	House Bill 5 – Special Guest speaker from the OML	Pfahl 240
3:30pm - 4:20pm	House Bill 5 Application Overview – Tami Tyner, Shelli George	Pfahl 240
Tuesday		
Time	Session	Room
9:30am - 11:50am	Best Practices/Free for All Lab – Shelli George, Alex Hope	Pfahl 230 Lab 
1:00pm - 1:50pm	Authority Tax Connect – Alex Hope, Shelli George	Pfahl 140
2:00pm - 2:50pm	W-2 Module – Shelli George, Alex Hope	Pfahl 140
3:00pm - 4:50pm	Tax Round Table – Shelli George, Alex Hope	Pfahl 140

Tax Session Descriptions

Authority Tax Road Map

Discussion about the direction of Authority Tax for the upcoming year. Includes discussion on innovation and research into future needs.

Tax Side-by-Side

This helpful session displays a side-by-side demo of Tax Client/Server and Authority Tax. Outlines the differences between the two applications and improvements to new tax application.

House Bill 5

Learn the latest information about HB5 and future legislations affecting tax offices.

HB5 Application Overview

Learn the application enhancements, changes and city flags made to keep Authority Tax HB5 compliant.

Authority Tax Connect

View a demo of the Authority Tax Connect module, and learn to use the web to get balances, pay taxes, and e-file returns.

W-2 Module

Introducing the New W-2 import module available in both Tax Client/Server and Authority Tax.

Tax Round Table




Use this opportunity to share ideas and discuss current issues for Authority Tax with Civica CMI staff.

Tax Labs

Tax Best Practices/Free for all Lab

This lab will teach you the best way to enter transactions/cash – presented in a “tips and tricks” format. Users will have the opportunity to suggest items they struggle with for personalized “walk-throughs” of those procedures.

Utility Schedule

Time	Session	Room
Monday		
9:30am - 10:20am	Utility Year in Review/Roadmap - Chris Wayne, Joe Patterson, and Glen August	Pfahl 102
10:30am - 11:50am	Utility Round Table - Joe Patterson	Pfahl 102
1:00pm - 2:20pm	"Free for All" Lab - Chris Wayne, Joe Patterson, Glen August, and Randy Demidovich	Pfahl 230 
Tuesday		
9:30am - 10:50am	Tips and Tricks for Utility - Randy Demidovich and Glen August	Pfahl 102
11:00am - 11:50am	Change Management - Joe Patterson and Matthew Snider	Pfahl 102
1:00pm - 2:50pm	Best Practices for Utility - Joe Patterson and Matthew Snider	Pfahl 102
2:30pm - 3:20pm	User Defined Reports (UDR)/Authority Report Writer (ARW) Lab - Glen August and Randy Demidovich	Pfahl 230 
3:30pm - 4:50pm	Free for All (continued) Lab - Chris Wayne, Joe Patterson, Glen August, and Randy Demidovich	Pfahl 230 

Utility Sessions

Utility Year in Review/Roadmap 2017

Review of software changes in Authority Utility in 2017. New functionality will be discussed and demonstrated by Civica CMI Utility Development staff.

Utility Round Table

Open forum for discussion with users, Civica CMI developers, and Civica CMI Project and Support Staff. Bring your ideas and feedback to this session for direct interaction with the Civica CMI utility group.

Tips and Tricks for Utility

Learn tips and tricks in Authority Utility and UTYX that will help you in your day-to-day operations.

Change Management

How to prepare yourself and your staff for technical and process changes, embracing change and how to be successful with change.

Best Practices for Utility

Review of common utility processes such as cash handling, proofing, data integrity, and billing and reading systems. Learn how to be more productive and effective in your office.

Utility Labs

"Free For All" Lab

UTYX and Authority -- This session is a hands on opportunity to interact and use the utility software packages guided by Civica CMI staff. Test out and try any process on test data in both UTYX and Authority Utility. Come to this session with questions and processes you would like to try.

User Defined Reports (UDR)/Authority Report Writer (ARW) Lab

Learn to create your own reports in Authority Utility and your own User Defined Reports in UTYX.

Conference Notes

Please remember these following important points about the 2017 Civica CMI User Conference:

- You are responsible for making your own reservations at The Blackwell Inn.
- All content in this program is subject to change and despite our best efforts, the program may contain errors.
- Your feedback is exceptionally valuable to us. Our goal at Civica CMI is to serve our clients with excellence; to do that, we need to know what your thoughts are. Before leaving the conference, please take the time to complete a conference survey and return it to the registration area (at which time you'll be given a swag bag).
- If you have any questions about registration, please contact Oddie Sumlin at 937-836-4499, ext. 3117 or via email at Sumlino@civicacmi.com. If you have general questions about the conference, please contact Lynn Mitchell at 937-836-4499, ext. 3180 or via email at mitchellL@civicacmi.com.

Have social media accounts? Feel free to hashtag the conference using:

#2017BetterTogether

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