

RG CONNECT 2018 | SESSION DESCRIPTIONS

ALL = All Audiences, BI = Business Intelligence, GP = Microsoft Dynamics GP, SI = Sage Intacct

BREAKFAST: 7:15 AM - 8:00 AM - Sponsored by eRequester

GENERAL SESSION: 8:00 - 9:15 AM (Rooms 404-405)

Welcome & Logistics by Gary Volland, Master of Ceremonies

Opening & Keynote by Marty Schillaci of The Resource Group & Aaron Harris of Sage Intacct

BREAKOUT SESSIONS: 9:30 - 10:15 AM

What's New in Dynamics GP Overview

Room 402 | Track: GP | Presenter: Tim Tobias

If it has been awhile since you've last updated Dynamics GP or you have not taken advantage of the newest features, attend this session to learn the top features of Dynamics GP from 2015 to 2018.

Reporting in Dynamics GP

Room 403 | Track: GP | Presenter: Kevin Kooiker

A look at the differences in various reporting tools available in Dynamics GP, including Report Writer, Smartlists, Smartlist Designer/Builder, Refreshable Excel Reports, Word Templates, and Navigation Lists.

Sage Intacct Roadmap

Room 406 | Track: SI | Presenter: Aaron Harris, Sage Intacct

Hear what's new from Sage Intacct as Aaron Harris, Senior Vice President, Head of Engineering and Technology talks about the future of this cloud solution.

Power BI with the BI360 Data Warehouse - Insights Without Manual Data Manipulation

Room 407 | Track: BI - ALL | Presenters: Tracy Rich, Solver & Filius Bonacci

What good is your data if not presented in a way that is meaningful or easily understood? How much precious time is lost on getting data prepared for reporting vs. analyzing the insights in the data? Learn how setting the correct foundation with the BI360 Data Warehouse combined with Power BI will significantly improve performance for data boards and data visualization. With the Foundation in place, see how someone without any prior knowledge will be able to quickly understand a report without explanation and be able to interact with the data to gain those additional insights.

BREAKOUT SESSIONS: 10:30 - 11:15 AM

Sage Intacct and Dynamics GP Help Desk Overview

Room 401 | Track: ALL | Presenters: Grace Wordsworth & David Mann

The Resource Group's Help Desk team is here to make sure that when you have talked to one of us, you leave with the feeling that you are the most important person we have served today. With this presentation, we'll show you some tips, tricks, and guidelines to make the help desk process effective, easier, and less stressful.

Explore Opportunities for Improved Efficiency with Self-Service Users and Workflow Capabilities

Room 402 | Track: GP | Presenter: Tim Tobias

This session will focus on advantages of the self-service user type as well as configuring and applying the expanded workflow functionality available in Dynamics GP.

Should I Upgrade Dynamics GP or Migrate to Sage Intacct?

Room 403 | Track: GP | Presenters: Gary Volland & Brady Curtis

In this session, we'll discuss the considerations for upgrading your Dynamics GP solution or migrating to Sage Intacct. We'll also provide a functional comparison of Dynamics GP and Sage Intacct as well as help you understand the migration journey and address your questions.

Best Practices in Period Closing in Sage Intacct

Room 406 | Track: SI | Presenter: Laura McDowell

Month-end closing can be a daunting and arduous chore. Thankfully, Sage Intacct's multi-ledger system, customizable journals, and rich reporting can greatly accelerate your month-end close. Come learn about best practices as well as tips and tricks to make your closing process in Sage Intacct something to look forward to!

Thank you Altec for sponsoring our delicious break snacks!

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BREAKOUT SESSIONS: 10:30 - 11:15 AM

Gain Insight, Time, and Greater Efficiency Using Sage Intacct Collaborate

Room 407 | Track: SI | Presenter: Todd Bowsby

Join us to learn how Sage Intacct Collaborate can help your organization through improved communications and process efficiencies. We'll provide an overview of what Sage Intacct Collaborate is and how it works while sharing real-world examples. Learn how you can leverage Sage Intacct Collaborate to help provide greater insight into your data, save valuable time through efficient communication, leverage permanently recorded conversations as historical references, and provide auditors a new level of understanding.

BI360 in the Cloud

Room 408 | Track: ALL | Presenter: Tracy Rich, Solver

Join this BI360 Session to learn more about how BI360 Cloud is revolutionizing the way companies enable world-class decisions. With BI360's complete, modern Web and Excel interfaces, BI360 gives your organization the ideal enterprise corporate performance management platform for better and faster decision-making for everything from strategy, forecasts, budgets, reports, and analysis, using comments and automated email updates so that everyone can collaborate seamlessly and stay in the loop, whether you choose to deploy on-premises or in the cloud.

SPONSOR EXPO: 11:15 AM - 12:15 PM (Rooms 404-405)

LUNCH: 12:15 - 1:15 PM (Rooms 404-405) - Sponsored by Binary Stream

BREAKOUT SESSIONS: 1:15 - 2:00 PM

Meet Your CAMs - How Can We Help You?

Room 401 | Track: ALL | Presenters: Kateri Garton & Romy Andrews

Your Customer Account Managers are an additional resource for you to work with at The Resource Group. During this session, you'll learn how to leverage your CAMs to help you get the most out of your Dynamics GP and Sage Intacct solutions. Topics to be covered include the benefits of regular check ins, why you should consider an Operational Review, and the value of an Unlimited Support Plan.

Management Reporter for Dynamics GP

Room 402 | Track: GP | Presenter: Kevin Kooiker

Learn interesting techniques for designing and distributing financial reports with Management Reporter.

Using Recent System Tools and Reviewing the GP Upgrade Process with Post Upgrade Tasks

Room 403 | Track: GP | Presenter: Kayla Schilling & Michael Krasivsky

In this session, learn why you should upgrade Dynamics GP in order to implement the latest features, such as Odata, Power BI, and Web Client. We'll provide you with an overview of the Dynamics GP upgrade process, and best practices for IT Professionals to perform after an upgrade.

Report Writer in Sage Intacct

Room 406 | Track: SI | Presenter: Grace Wordsworth

The financial report writer in Sage Intacct is one of its most valuable tools. Please join us as we walk through how to effectively use and leverage the report writer to provide your company with optimal visibility.

Explore, Examine, and Reveal the Power of Sage Intacct Projects

Room 407 | Track: SI | Presenter: Todd Bowsby

Join us as we explore the various facets of the Projects series of modules within Sage Intacct. We'll take an overview look at the project and task records, review Gantt Charts, resource searching and scheduling, and examine various reporting and dashboarding options related specifically to projects. Finally, we'll reveal Top Secret functionality you can begin using immediately that will help your organization become more efficient in its use of Sage Intacct Projects.

Budgeting & Forecasting: How to Enable World-Class Decisions with BI360

Room 408 | Track: BI | Presenters: Tracy Rich, Solver & Filius Bonacci

BI360's Planning module provides your organization with a complete data entry interface to capture strategies, goals, budgets, forecasts, and what-if scenario models. Available for both cloud and on-premises deployment, the BI360 solution comes with workflow to help you manage it all - and without the typical long implementation and high software cost of legacy planning solutions. BI360 replaces manual budget processes that can be very cumbersome to maintain and automates and streamlines your budget process with integrations to both Dynamics GP and Sage Intacct. Join this BI360 session to learn more about how we can help your organization make world-class decisions.

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SPONSORS BREAKOUT SESSIONS: 2:15 - 3:00 PM

Supply Chain on Steroids—Supercharge Your Dynamics GP System!

Room 401 | Track: ALL | Presenter: Janice Phelps, Blue Moon

Wikipedia defines supply chain as “system of organizations, people, activities, information, and resources involved in moving a product or service from supplier to customer”. Does this apply to you? If so, the faster you move those products, the faster you can get them from supplier to customer. And, when you do all of that by leveraging your information systems rather than by adding people, your systems help you process more transactions faster and easier. Learn how Blue Moon’s products can take your system to a super-charged level!

Dynamics GP in the Cloud with Office 365 – Be a Hero in Your Organization While Liberating Your IT Staff.

Room 402 | Track: GP | Presenter: Steve Tanner, Data Resolution

Dynamics GP is better than ever. New tools are available for sharing your GP data, but how can you take better advantage of them? Join us to learn how you can get more out of your day with Dynamics GP in the Cloud augmented with Office 365. Learn about case studies and best practices you can use to be a true hero in your organization while liberating your IT staff.

Go Digital with DocLink for Dynamics GP

Room 403 | Track: GP | Presenter: Scott Hall, Altec

Are you a CFO, Accounting Manager, AP Clerk, HR Manager or IT? What would it mean if you could spend less time touching documents, yet gain improved efficiency, visibility and control? Go digital with DocLink document management and workflow solution and you can eliminate the paper-based bottlenecks. Find out how DocLink allows users to fully utilize and enhance their Dynamics GP to automate any document-intensive process and go digital in AP, AR, Sales Order, Contracts, HR or any department across the entire enterprise.

Rapidly Deploy Cost Containment Measures

Room 406 | Track: ALL | Presenter: Ben Litjen & Eric Osborne, eRequester

Dive in and see how spend management software can assist you in rapidly deploying cost containment measures. Explore spend management system benefits that can help you save time, save money and spend wisely—simplify cost containment with visibility, controls and savings.

Solving Enterprise Grade Business Challenges in Dynamics GP

Room 407 | Track: GP | Presenter: Bernie Macht, Binary Stream

SMB companies have complex business problems to solve, just like large organizations. But their budgets cannot handle Tier 1 enterprise ERP systems. In this session, Binary Stream will discuss how a variety of complex accounting and business processes that can swamp smaller companies can be automated, streamlined and improved within an SMB budget.

Making Automated Sales Tax Easy

Room 408 | Track: ALL | Presenter: Cameron Murphy & Paul Weese, Avalara

Cutting-edge technologies and superior processing logic help manage the most complicated tax issues, such as situs, nexus, tax tiers, tax holidays, exemption certificate management, and product taxability rules. Attend Avalara’s session to explore an opportunity to improve processes and reduce tax compliance risk with sales tax automation. By attending this session, you’ll learn how Avalara enhances sales tax functionality, how exemption certificates work and why they are important, and finally, how easy it is to manage and report on tax with Avalara.

GENERAL SESSIONS: 3:15 - 4:30 PM

Sage Intacct Tips and Tricks

Room 406 | TRACK: SI | Presenter: Laura McDowell & Grace Wordsworth

Want to be more efficient and effective in Sage Intacct? Over the years, our experienced Sage Intacct consultants have learned and developed helpful methods to improve your day-to-day operations in Sage Intacct. Come join us to gain tools that you can use to develop more streamlined processes!

Tips and Tricks for Microsoft Dynamics GP

Rooms 404-405 | TRACK: GP | Presenter: The Resource Group

Join The Resource Group team as we provide you with tips and tricks to better use your Dynamics GP solution.

BI360 Tips and Tricks

Room 403 | TRACK: BI | Presenter: Solver

Learn valuable tips and tricks to better use BI360.

CLOSING & PRIZE DRAWING (Rooms 404-405) by Marty Schillaci
HAPPY HOUR 4:30 - 5:30 PM (Foyer or Patio)- Sponsored by Data Resolution