

NW Symitar Users' Conference
Hosted by: Numerica Credit Union
May 6 – 8, 2009

RSVP at www.ucreditu.com/rsvp

Dates: May 6 – 8th, 2008

Where: Numerica Credit Union (Wednesday Only)

14610 E Sprague, Spokane Valley 99216

Center Place (Thursday – Friday)

2426 N Discovery Pl, Spokane Valley 99216

CU Contact: KayCee Murray, kmurray@numericacu.com

Recommended Hotels:



Oxford Suites Spokane Valley

<http://www.oxfordsuitesspokanevalley.com/>

Rooms are \$93 a night and include hot continental breakfast. Also, includes free shuttle service to and from airport, Numerica, and Center Place. Ask for the Numerica rate. Room rate is good through April 6, 2009.

15015 E. Indiana Avenue

Spokane Valley, WA 99216

Toll Free: (866) 668-7848 or Phone: (509) 847-1000



Residence Inn by Marriott - Spokane East Valley

<http://www.marriott.com/hotels/travel/gegri-residence-inn-spokane-east-valley/>

All rooms are suites with full kitchen and separate areas for sleeping, working, eating and relaxing.

15915 E. Indiana Avenue

Spokane Valley, WA 99216

Phone: 509-892-9300

Recommended Airport:

Spokane International Airport (GEG) - service from Alaska/Horizon, Southwest, Delta, Frontier, Northwest, Skywest, United/United Express, and US Airways/American West.

Transportation:

- **Rental cars** available at the airport from Alamo, Avis, Budget, Dollar, Enterprise, Hertz, National & Thrifty
- **Shuttle service** available free from Oxford Suites or from Payless Airport Shuttle

Agenda

Wednesday, May 6, 2009

10:30 a.m. – 4:00 p.m.

10:30 AM – 11:00 AM	Registration
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Track 1

Track 2

11:00 AM – 1:00 PM	Management Discussion <i>Facilitated by: Tracey Scriven, Silver State Schools CU</i> Possible topics include: <ul style="list-style-type: none"> ▪ Management Challenges: project management, business analysis, policies and procedures, working with the board, budgeting, etc ▪ Creative cost cutting ideas ▪ Getting projects approved when budgets are shrinking <p style="color: red; font-weight: bold;">If you have specific management challenges you'd like to discuss, email Tracey at tscriven@silverstatecu.com.</p>	11:00 AM – 1:00 AM	HTML Post Back <i>Presented by: Ron Murray, Cutek</i> This class will explain how you can build HTML specfile interfaces in Episys, including display-only HTML specfiles, interactive "Postback" HTML specfiles and "blind-post" specfiles."
1:00 PM – 2:00 PM	LUNCH	1:00 PM – 2:00 PM	LUNCH
2:00 PM – 4:00 PM	Improving Bottom Line & Cutting Costs Through Vendor Management <i>Presented by: ORCC</i>	2:00 PM – 4:00 PM	HTML Post Back Continued <i>Presented by: Ron Murray, Cutek</i>
4:00 – 4:30	Numerica CU Tour	4:00 – 4:30	Numerica CU Tour

Cinco (or Seis) de Mayo Happy Hour & Golf
at Palenque's Mexican Restaurant / Trailhead Golf Course in Liberty Lake
 Sponsored by



Trailhead is an executive par 3 course with a driving range and putting green.

AGENDA

Thursday, May 7, 2009
8:30 a.m. – 4:30 p.m.

8:30 AM – 9:00 AM	Registration & Continental Breakfast
9:00 AM – 10:00 AM	Introductions and “What’s New at Your Credit Union?” This is your chance to meet the other attendees and find out what everyone is working on. Pose questions for projects you may need help on and share your expertise.
10:00 AM – 10:45 AM	Symitar Update <i>Presented by: Account Execs</i>
10:45 AM – 11:00 AM	BREAK
11:00 AM – 12:30 PM	IBM & Symitar: A Hardware Roadmap <i>Presented by: Brad Pietrazak, Symitar & IBM</i> This session will provide an overview of Symitar’s solution for Virtualized Episys environments. Scott will be describing benefits of a SAN environment and answers to all of your technical questions.
12:30 PM – 1:30 PM	LUNCH – Sponsored by ORCC 
1:30 PM – 2:15 PM	Solutions from CU So Cal Partners <i>Presented by: Ray Rounds & Rick Menjivar, CU So Cal Partners</i> Check out the latest developments and news from CU So Cal Partners. More details to come.
2:15 PM – 2:45 PM	Taking Advantage of Collateral Manager for Business Document Tracking <i>Presented by: Sherrie Arruda, Numerica Credit Union</i> Learn how Numerica implemented collateral manager to track documents in the Business Services department. Sherrie and Sharon will share the pieces IT was responsible for in implementation, how Numerica came to use Collateral Manager, and how it benefits the Business Services Department.
2:45 PM – 3:00 PM	BREAK
3:00 PM – 3:45 PM	Security Update <i>Presented By: Jim Stickley, Trace Security</i> Hear the latest in security news from our favorite security entertainer.
3:45 PM – 4:15 PM	Reducing Your Good Night Jobs <i>Presented by: Al Krabill, Watermark CU</i> Simplify your end of day processing by using fewer Goodnight jobs for month-end, quarter-end, year-end, and everything else. Learn why Watermark has turned reduced the number of goodnight jobs, what benefits they’ve seen, and how they implemented one goodnight job.




Happy Hour & Pizza at Players & Spectators

6:00 – 8:00

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AGENDA
Friday, May 8, 2009
8:30 a.m. – 3:00 p.m.

8:30 AM – 9:00 AM	Registration & Continental Breakfast
9:00 AM – 9:45 AM	<p>A Year Later with SMA <i>Presented by: Jim Buerer, Great Lakes CU</i> Last April Jim shared his experience in setting up and using the SMA's OpCon/xps to automate the computing environment. Jim's back to share his experiences of how the software is working after one year of use, what tasks have been automated, and what overall impact the credit union has seen from using SMA's OpCon/xps technology.</p>
9:45 AM – 10:30 AM	<p>Collections and Predictive Outbound Dialing <i>Presented by: James Burke-Frazier, Wescom Resource Group</i> Hear what Wescom CU has done to help speed up call times, shorten the promise to pay window and increase successful promise to pay cycles. Includes information on Predictive Dialing, Event Management, Leveraging Direct ACH ,Credit Card payments, and Loan Transfers</p>
10:30 – 10:45	BREAK
10:45 AM – 11:15 AM	<p>CU Technology Trends & Issues <i>Facilitated by: Geoff Cummins, Sno Falls CU</i> Share strategies, thoughts, and processes on some of the current IT trends and issues CUs are dealing with today in this round table discussion.</p>
11:15 AM – 12:00 PM	<p>Card/EFT Parameterization <i>Presented by: Mike Anderson, Mountain America CU</i> Learn how your credit union can benefit from parameterizing cards. Mountain America shares their reasons for moving to the card parameterization, how they implemented the change, and the overall impact of card parameterization.</p>
12:00 PM – 1:00 PM	<p>LUNCH – Sponsored by iPay Technologies</p> <div style="text-align: right;">  <p>iPay Technologies</p> </div>
1:00 PM – 1:30 PM	<p>Combo HELOC Loans <i>Presented By: KayCee Murray & Gerry Neff, Numerica CU</i> Interested in offering Combo Loans? There is much more involved that simply requesting Symitar to enable the feature. Find out what steps need to be taken in order to successfully offer combo loans. See how credit unions are using the Episys enhancement to provide a unique product to member.</p>
1:30 PM – 2:15 PM	<p>Online Bill Pay...Industry Statistics & Consumer Adoption <i>Presented By: iPay Technologies</i> Hear about industry statistics and consumer adoption of bill pay and the values of outsourcing your bill pay.</p>
2:15 PM – 3:00 PM	<p>Unique Uses <i>Facilitated by: Josh Marshall, University of Utah CU</i> Check out some of the cool things other CUs have been up to lately.</p> <p style="color: red;">Send your unique uses to jmarshall@uofucu.com.</p>