

Welcome to IMUC 2017!

This year's courses are designed with you in mind! For years, our clients have been asking us to deliver content with suggested "best practices" in mind. We agree! This year's courses are going to focus on global (portal) content, suggested best practice and best use case, more advanced courses and training sessions and less module-specific content.

There is something for everyone and we hope that this year's improved format and space allocation will be a hit for all attendees!

Don't forget to also sign up for the **Social Event** on Tuesday night which is always the hit event of the year! (...and don't forget to buy your spouse ticket in advance!) This year, we are having a Pub night which will be held at Merlin's Bar and Grill. There will be lots of great food and drinks so be ready to come, socialize and enjoy the best of Whistler.

Also, don't forget that we keep key staff on-hand in the **Ask an Expert** room to provide you with one-on-one help, tips and tricks when you have a few moments to spare!

Tuesday

8:45-9:45

Welcome and Annual Update including a high-level view of what you can expect to see and learn in this year's courses! You'll also get to meet the Millennium team and see what we've been busy working on!

10:00-11:00

R1: End User Training: Reporting Advanced Options

This course is going to focus on the end user experience and dive into those "Foundation Reports" and explore the cool ways you can work with baseline reports and review the data in an entirely new way. One of the challenges that end users often have is understanding just how versatile, dynamic and flexible the reports really are. The key is knowing how to work with those reports to summarize the results using the Advanced Options to answer a wide variety of questions. Baseline – or Foundation – reports are never one-size fits all and we want to train end users on how a little creative slicing and dicing can go a long way!

R2: Admin Training: Let's Eliminate those Shadow Systems! (part 1)

We all have them! – those pesky shadow systems where users are tracking data outside of Banner and storing it on various spreadsheets and tables. Sometimes it's because there is nowhere in Banner to store key data and other times the gap exists because you may not have the ability to access or edit those forms. Either way, they live on individual computers and are just not ideal. We know that you want to get rid of them to centralized the data entry, capture more accurate and meaningful data and, above all, allow for consistent and user friendly reporting. We're going to start with the newest member of the Admin family called the FAST Table Builder and show you how easy it is to migrate these data sources into FAST! Course #1 will cover the initial steps of creating your FAST Table, options to pre-populate that table with existing data, and create dynamic filter procedures that will ultimately make

your data entry reporting page seamless and user-friendly. If you're an application-level administrator, this is one you can't afford to miss!

R3: Budget and Forecasting: Budget Development and Position Planning

With so many new and exciting enhancements in the Budget world, we decided to break out each key area and offer dedicated courses to cover them all. Course #1 is going to focus on your core Budget Development processes from both a set-up (admin) and end user (centralized or de-centralized) perspective. We will also cover the new budget reporting in depth and show you some best practice solutions. We'll also introduce you to the newest member of the Budget and Forecasting family – Position Planning that allows you to input, track and maintain a position distribution list to track position, dollars, FTE data and even distribution of dollars over two or more orgns for split funding scenarios whether there is an incumbent tied to the position or not.

11:30-12:30

R1: End User Training: Pinned Reports and the Report Scheduler

There are some major changes this year to the security model concerning Pinned Reports. Because Pinned Reports are (we think!) one of the most powerful and most important feature in all of FAST, we want to be sure that end users and power users are aware of the key changes and how they will impact your use of Pinned Reports. We also want to be sure you know about the Report Scheduler and how to schedule your personal pinned reports to deliver right to your in-box on a personalized schedule that meets your needs.

R2: Admin Training: Let's eliminate those shadow systems (part2) – intro to the Data Entry Page Builder

Course #2 is going to use the new table that we built in Course #1 and run it through the Data Entry Page Builder to create a user-friendly custom data entry page where you can directly input, store and manage external data right in FAST. We'll cover the full process of how to create the page, include validated fields from the FAST data warehouse, layer on multiple security options and then make the report available to your end users.

R3: Budget and Forecasting: Budget Transfer, Admin and Posting to Banner

In this Budget and Forecasting course, we're going to dive into the in-year function of Budget Transfers and offer training on Budget Admin and that very scary process of posting to Banner! We will show you what's changed and offer several best practice suggestions on the latest features and functionality.

1:45-2:45

R1: End User Training: Virtual Columns and MyDynamic Selections

This end user training course is going to take a look at some of the newer tools in FAST: Virtual Columns and MyDynamic Selections. These are both total game-changers and we want to show you just how powerful – yet easy to use – they can be! A little training goes a long way and we want to be sure you're aware of the cool new stuff and more importantly, are comfortable making use of it!

R2: Admin Best Practices: Pinned Reports, Scheduler, Security Updates and Dynamic Selections

This course will tackle several key administrative functions within FAST. Like all Admin courses, this one is module-neutral and we'll use examples from a variety of applications so you can see how the functions can and should relate to your workflow options. We're also going to explore the important new updates to pinned report security that will be crucial to understand moving forward. This course is designed to show you what's new, offer some best practice solutions and above all, show you – the administrators – how to manage the app centrally and show you just how much control you have on how your end users access, review and consume data in FAST.

R3: JV / WR / PCard Demo, Round Table

If you use any of the above apps frequently then we want to hear from you! We'd like to open the floor to you, the end users, and ask to hear about your experiences, discuss any gaps or pain points that you may have. Sharing ideas and tips is the best way to learn new and creative ways of doing things. We'll also have a few computers on-hand (or you can bring your own), for an open-lab where you can ask questions, get answers, see a short demo and discuss where we go next! Because there is no defined structure, you can certainly come and go as you like in this class once the material that matters to you has been discussed.

3:00-4:00

R1: Finance Round Table Discussion

We will do a demo on how to use some of the new stuff, but we want this time slot to really be dedicated to a dialogue about how you're making use of FAST Finance Reporting in the centralized areas of Finance, Accounting, Budgets, Research and more – plus those of you who have de-centralized the app to your academic units as a self-service Budget to Actuals tool. We want you to share your experiences with others and also hear what's working well, what you'd like to see next and design a Finance roadmap with your requests and needs in mind.

R2: Student Financial Aid Demo and Discussion – what have we done for the US schools and what are the needs in Canada

The latest addition to the FAST reporting family is the Financial Aid application. This ties in to Student Reporting and has so far been developed and made available to our American clients only. We want to show you what we've done and offer Canadian Financial Aid and/or Registrar's office staff the chance to come and discuss what needs FAST could potentially meet for your unique reporting challenges. Come to this course for a demo and also a round-table discussion.

R3: HR Round Table Discussion

We will do a demo on how to use some of the new stuff, but we want this time slot to really be dedicated to a dialogue about how you're making use of FAST HR in the centralized areas of HR, Payroll, HRIS, Faculty Tracking and more – plus those of you who have de-centralized the app to your academic units as a self-service tool. We want you to share your experiences with others and also hear what's working well, what you'd like to see next and design an HR roadmap with your requests and needs in mind.

Wednesday

8:30-9:30

Client Presentations – How clients have used FAST to be successful!

10:00-11:00

R1: Budget and Forecasting: In-Year Forecasting and Multi-Year Planning

In this third and final instalment, we are going to introduce you to our in-year tools for Forecasting as well as the future dated planning functionality that we refer to as Multi-Year Planning. We are going to demo each of the 5 baseline forecasting models so that you can begin to give some thought on which model will work best for your institution's budget and forecasting methodology. We are going to cover how to set-up your initial forecast and planning series, by fiscal year, how to load data to your series and cover some options on how and where end users can layer on their known changes to the approved budget. We'll also cover the reporting pieces in detail so that you can do more with your data once you have it!

R2: Admin Training: Report Level Administration including Virtual Columns, Restricted fields and other Admin enhancements

Report-Level Administration is a concept is often overlooked in FAST. Not because you don't care, but often because you are not aware! (Cool, that even rhymed!) We will discuss some best practice solutions for each function and show you can help your end users make the most of all your FAST reports and ensure that each and every report is aligned with your organization's business rules, language and above all, that your report content is relevant and useful!

R3: Student Round Table Discussion and Demo: Dynamic Selections Demo and Discuss Retention Reporting

This one is all about *you*! If you're running FAST Student, then we want to talk to you. This loosely formatted Round Table is more of a brainstorming session and we want to hear about your experiences, challenges and victories using FAST Student Reporting. What's working well? What are your pain points? How are you solving Student reporting challenges in your Registrar's office and out in the de-centralized academic community? We are also going to demo a brand new feature called MyDynamic Selections and we'd like to discuss the growing topic of Student Retention Reporting; what does it mean to you and what do you need in FAST to accurately report on Student Retention at your university, college or department?

11:30-12:30

R1: Finance Training: Financial Statement Editor

This course will walk FAST Finance Reporting users through the use and functionality of the Financial Statement Editor. This is an advanced tool use mainly by power users who have a strong knowledge of the organization's Chart of Accounts. The Financial Statement Editor allows users to create grouped line items by FOAPAL where you can include and exclude any number of elements to display and aggregate exactly the data required for the Financial lead sheets.

Once the Statement has been created – using any number of grouped categories and line items – it can be saved as a Pinned Report and even scheduled using the Report Scheduler. This course will walk through all the basics and should be attended by advanced users of the Finance Reporting application.

R2: Admin Training: Dashboarding for Groups

Dashboards are brand new and better than ever! You have been asking for it and we have finally revamped the entire dashboarding toolset to give you more options, better graphs, more intuitive design and functionality and so much more! To make the best possible use of the enhancements to Dashboarding, we want to teach the administrators how to effectively manage groups and use the Group Dashboards to pre-populate your end users' dashboards with a variety of grids, graphs and charts. We will also show you how to customize the colour palette to anything you can imagine – even your school colours! This is a brand new design with so much more functionality; even if you've never used FAST Dashboards, now may be the time to start!

R3: End User Training: Welcome to the NEW FAST Dashboarding!

Dashboards are brand new and better than ever! You have been asking for it and we have finally revamped the entire dashboarding toolset to give you more options, better graphs, more intuitive design and functionality and so much more! The end user Dashboarding course is going to look at Dashboards, charts and graphs from your point of view – focusing on how to create and manage your own dashboards for a variety of workflow options and how to create charts and graphs to give you quick and easy access to not only the report data but drill-down to the detail right from your dashboards. We'll show you the new and improved Dashboarding tools and how to make the most of them in your favourite FAST apps!

1:45-2:45

R1: Intro to the new FLAC (Faculty Load and Compensation) Tools in FAST

Do you have challenges managing and reporting on Faculty FTE, Generated Credits, and Workload? Brand new in FAST! We now offer baseline reports and workflow options for tracking Faculty Load and Compensation. These reports reside in the student application but really “bridge the gap” between HR, Payroll, and Student. This functionality was designed to be used separately and/or in conjunction with Banner Faculty Load and Compensation. This is a hot topic these days and we want to show you what we’ve built, who it’s designed for and how to make use of it.

R2: Admin Training: Advanced Dashboarding for Groups

If you’re an administrator and you’re looking to take Dashboarding to the next level, then this is a course you won’t want to miss. Whether you’re using Dashboards now or not, you will want to explore the new possibilities in our brand new and improved toolset. The advanced course is going to show you how to go beyond the basics and really dive feet first into the good stuff!

R3: AR / Research Round Table Discussion and open lab for training, questions and more

If you use any of the above apps frequently then we want to hear from you! We’d like to open the floor to you, the end users, and ask to hear about your experiences, discuss any gaps or pain points that you may have. Sharing ideas and tips is the best way to learn new and creative ways of doing things. We’ll also have a few computers on-hand (or you can bring your own), for an open-lab where you can ask questions, get answers, see a short demo and discuss where we go next! Because there is no defined structure, you can certainly come and go as you like in this class once the material that matters to you has been discussed.

3:00-4:30

This session is going to wrap-up all the latest and greatest tools in the new FAST apps and tie it up nicely with a bow!

One of the activities we are working on in the availability of sending Texts to Employees and Students, and allowing them to text back! All of this would be logged in FAST for reference. Come and tell us how this could work for you, and any security or privacy issues that we need to know about!