2014 SMUG Conference Agenda
March 25, 26 & 27, 2014
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Tuesday, March 25th	
8:00-9:00	**Continental Breakfast/Registration/Vendor setup**
9:00-12:30	***Pre-Conference PowerON Class*** ***(Using Twitter Bootstrap in PowerON – Streamlining HTML post back form development by 50%)*** **By Mike Blumenthal, Technology Happens**
12:30-1:30	**Lunch (provided for those in class)**
1:00 – 5:00	**Vendor Fair and Registration**
1:30-5:00	***Pre-Conference ARCU Training*** **By Jason Bedsworth, CFS Consulting Group**
6:00 – 8:30	**Event – Spare Time Bowling – *Sponsored by* XPRESS DATA INC**

Wednesday, March 26th			
Morning			
8:00 – 9:00	**Registration and Continental Breakfast**		
9:15 – 10:00	***Meet and Greet – Welcome to MSUFCU*** **By April Clobes/Pat McPharlin, MSUFCU**		
10:15 – 11:00	***Security is for Suckers*** **By Jim Stickley, Trace Security**		
11:15 – 12:00	***Rediscover Episys*** **By Desiree Bobet , Symitar**		
12:00 – 1:00	**Lunch - Vendor Fair**		
Afternoon	**Track 1 – Room 167**	**Track 2 – Room 168**	**Track 3 – Room 169**
1:15 – 1:45	***DR Recovery for Windows Based Servers*** **By Phyllis Chappell, Symitar**	***Future of Mobile Banking*** **By Hannah Berthlot, Access Softek**	**Evolution of Document Management – Where Are You?** **By Yaves Graham, Imaging Office Systems**
2:00 – 2:30	***Advanced Technical Solutions using Java with PowerOn*** **By Scott Conaton, Chris Truckner, Keith Oberlin and Andy Wardell Michigan State Federal Credit Union**	***SMA Insights*** **By Cindy King, SMA Solutions**	***Log Management*** **By Scott Sturkie, ACI Defense**
2:45 – 3:00		***Sage Select Marketing*** **By Steve DeNolf, Sage Direct**	**Providing Self Service Options for your Members** **By Mark Christmas, Dovelink Business**
3:15 – 3:45	**Vendor Fair - Snacks**		
4:00 – 4:45	***Symform vs. SymformPDF*** **By Mike Blumenthal, Technology Happens**	***PowerOn Marketplace*** **By Kevin Walter, Symitar**	***Seizing the Business Lending Opportunity, why the time is right for Credit Unions and their Members*** **By Jonathan Rowe, PhD, nCino**
6:00-9:00	**Event – Hall of Fame Café - *Sponsored by DataMail, Member Driven Technologies, & MVi-Millennial Vision***		

Thursday, March 27th		
Morning	**Track 1 – Room 167**	**Track 2 – Room 168**
8:30 – 9:30	**Breakfast / Vendor Fair**	
9:45-10:30	*OpCon Roundtable* **By Stacy Darr , System Coordinator, Interra Credit Union** **RK Borden, VP Information Technology, Blackhawk Community CU** **Kail Neuman, Symitar** **Todd Dauchy, CTO for SMA**	*Future of Document Processing* **By Patrick Arthurs, IMS Integration**
10:45-11:30	*Security with S3* **By Denny Howell, VP Technology Solutions** **Alliance Catholic Credit Union**	*The Benefits and Options for Supporting Telecommuting* **By David Reiners, Adapt Telephony Services**
12:00 – 1:00	**Vendor Fair—Lunch**	
Afternoon	**Track 1 – Room 167**	**Track 2 – Room 168**
1:15 – 2:00	*Cards Roundtable* **By Duane Schweiss, Symitar**	*Testing 123 Presentation followed by a Roundtable* **By Amanda Campos & Sandy Potter, Symitar**
2:15 – 3:00	*PowerOn Roundtable* **By Mike Orozco, Programming Specialist** **Health Care Associates Credit Union**	

Session Description	*Speaker Bio*
Pre-Conference PowerOn Class **Using Twitter Bootstrap in PowerOn – Streamlining HTML post back form development by 50%** Twitter Bootstrap: We'll be discussing how Twitter Bootstrap, combined with HTML post back, can save you development time. We will be reviewing and creating a template for you to take back to your Credit Union for use immediately. Laptops with VPN access are suggested but not necessary. HTML knowledge and PowerOn 2 experience is preferred but not required. Come explore some different avenues of innovation for your Credit Union.	**Mike Blumenthal** – Technology Happens
Pre-Conference - ARCU Training This session will include an overview of the options for report development within ARCU including hands-on exercises using Report Builder. The content is applicable to those attendees that are new to ARCU or are new to conducting reporting development with Microsoft's Report Builder.	**Jason Bedsworth** – CFS Consulting Group Jason Bedsworth is the leader of the Business Intelligence practice at CFS Consulting Group, Inc. Jason has been in IT Consulting for over 20 years working with a variety of financial services and not-for-profit organizations. Jason has led the effort to develop the ARCU Connectors' framework that focuses on enabling Credit Unions to obtain both strategic and operational value from their business intelligence investments. This framework was recently deployed at American Airlines Credit Union, Michigan State University Federal Credit Union, Partners Federal Credit Union to name a few. In addition to integrating into ARCU, the Connectors come with standard and ad hoc reports (that are growing with each Credit Union deployment). Jason is based out of Chicago, IL and when not working enjoys life in the Chicago Suburbs with his wife (Louise) and 4 children.

Security is for Suckers In this session Jim Stickley discusses how organizations are facing a new type of cyber threat while assuming that being in compliance means they are secure. Taking a step back, Stickley will discuss how cyber-attacks have continued to evolve and what lead to the Target breach. Then learn how these past attacks are leading criminals in a new direction that will eventually lead to the complete and total failure of the social security identification used today. During this session, attendees will see firsthand how vulnerable general business including financial institutions are to the future of cyber-attacks. In addition, Stickley will show how organizations have shifted their focus from security to compliance and how that shift is leading to numerous cyber breeches throughout the world. Of course Stickley will also discuss what your organization can and should be doing to prepare for future attacks and how your employees can keep your organization from becoming the next cyber breech news story.	**Jim Stickley** – Trace Security As CTO, Vice President of Strategy & Solutions, and Co-Founder for TraceSecurity, Jim Stickley has been instrumental in directing the TraceSecurity strategy. Jim is responsible for developing and releasing multiple versions of the software used by hundreds of clients today. With over 20 years experience in the hi-technology industry, Jim is in charge of the guiding principles and structure of all TraceSecurity solutions including products and services. Stickley has been involved in thousands of security services for financial institutions, Fortune 100 corporations, healthcare facilities, legal firms, and insurance companies. Through the years Stickley has discovered numerous security vulnerabilities in products such as firewalls, PKI servers, online banking applications and PDA devices. He has been a consultant for the network stations FOXNEWS, CBS and NBC as well as the Associated Press. Stickley has been featured in numerous magazines and newspapers including Time Magazine, Business Week, Fortune Magazine, New York Times, PC Magazine, CSO Magazine and hundreds of other publications. He has also been showcased on numerous television shows including NBC's "Nightly News", CNN's "NewsNight", CNBC's "The Big Idea", Anderson Cooper's "Anderson" and is a frequent guest on NBC's "Today Show".
Rediscover the Power of Episys This is an info-packed, high level demonstration that includes highlights of current and previous releases that may have been overlooked, and will also include time and money saving tips for better system performance. Even long time users will learn from this presentation.	**Desiree Bobet** – Symitar Desiree Bobet is a Product Solutions Consultant at Symitar. She has been with the company for over 16 years and comes to us with 13 years of experience from her employment at various financial institutions.
DR Recovery for Windows Based Servers Core is only half the battle. Join us for a quick tour to explain Centurion's new offering that allows you to vault and restore all your windows based data. Physical or Virtual, even the ones you didn't purchase from JHA!	**Phyllis Chappell** – Symitar
Future of Mobile Banking Mobile banking's growth, widespread use, and impact on your bottom line is fueled by more than skyrocketing adoption rates. Join our discussion about technology trends, business-expanding features, and the implications of the mobile banking tipping point.	**Hannah Berthelot** – Access Softek Hannah Berthelot is an implementation manager for Access Softek. Her responsibilities include managing new installations and upgrades, conducting training, and improving internal processes. She has been with the company nearly a year and has already collaborated with over a dozen credit unions to bring Access Softek's mobile banking products to their members.
The Evolution of Document Management – Where Are You? This topic reviews the current state of the ever evolving world of document management, paper scanning , storage of records and electronic signatures. Specific discussions on why products like ApplicationXtender (formerly known as OTG), Docusign, IMM, Hyland Onbase and continue to be at the forefront of Credit Union implementations. Imaging Office Systems will also discuss why you may want to think twice before switching to a new document imaging system and if you are behind on scanning how you can quickly catch up.	**Yaves Graham** – Imaging Office Systems Yaves Graham, a Certified Document Imaging Architect for Imaging Office Systems, has been the in business for over 19 years. His expertise is in system integrations of document imaging systems with core processors, large scale scanning conversion projects, workflow and document imaging system installations. Previous to IOS he worked in back office operations for Teachers Credit Union for 5 years responsible for electronic services and accounting. IOS counts more than 100 Credit Unions as its customers.

Advanced Technical Solutions Using Java with PowerOn In this seminar we will discuss the advantages of using alternate technologies to enhance the user experience, and resolve business problems that could not be solved by PowerOn alone. We will discuss the advantages of using Java programming in-conjunction with PowerOn to fulfill business requirements, and increase technological capabilities. Throughout our presentation we will discuss some of our in-house solutions to the following problems: Email Control Management – Stay off the Blacklist! PDF Export + Documents to Synergy – Save paper, save money, and increase efficiency. Custom Card Creation – Embossed/Flatcard, Stock/Custom images, In-House processing.	**Scott Conaton** – Lead Programmer **Chris Truckner** – Computer Programmer **Keith Oberlin** – Business Systems Analyst **Andy Wardell** – Computer Programmer Michigan State Federal Credit Union
Real-Time Monitoring and Management - Breaking the mold of traditional IT Systems Management, Teller Productivity Management and Production Management, SMA Insights is a real-time single solution to help Credit Unions improve operations and systems availability. In this session you will learn how SMA Insights uses transactional data and advanced analytics to monitor all of your critical business applications and resources from a member perspective.	**Todd Dauchy** – SMA Solutions Todd Dauchy joined the SMA Solutions team as Chief Technology Officer in March 2012. Bringing nearly 25 years of information technology experience in the financial services sector with him, Todd is responsible for SMA's global product strategy and operations. He holds a Bachelor of Science degree in Business Administration from the University of Phoenix.
Log Management While reviewing the regulatory recommendations regarding log management, this open-discussion session will provide insight and examples of credit union solutions in place today.	**Scott Sturkie** – Account Executive, ACI Defense. ACI Defense is a leading information security provider to financial institutions across the country. Offering solutions for perimeter security, IT audits and encrypted email, among others, ACI Defense is capable of addressing the many security needs of financial services institutions. Mr. Sturkie joined ACI Defense as an Account Executive in 2008. He regularly attends security conferences and often presents information regarding Security Awareness for financial institutions.
Sage Select Marketing Put individual or selective marketing and promotional information right on the member's statement and incorporate into supportive posters, signs, handouts and follow-up mailings.	**Gary Sage** – Sage Select Marketing Gary Sage is the Business Development Manager at Sage Direct.
Providing Self Service Options for your Members As your members become more technology savvy, get ahead of the curve with robust solutions that provide members with self-service options. These members thrive on self-service and expect them from their financial institution. This has been the buzz now for several years, "how can we better serve these "tech dependent" and "tech savvy" members?" Join us as we explore various concepts utilizing online methods, mobile apps, and remote unmanned micro-branches. You will see how you can utilize PowerOn® with sophisticated .NET and JAVA programs to streamline daily operations while better serving all your members.	**Mark Christmas** - DoveLink Mark Christmas is the President/CEO of DoveLink Business, based in Atlanta Georgia. Mark attended GA Institute of Technology, ultimately receiving his Bachelor's degree in Computer Science from Southern Polytechnic State University. Mark has served as a software engineer for 30+ years developing on a series of platforms for Fortune 100 companies, as well as working in the Financial or Credit Union industry for the past 14 years. Taking inspiration from his background Mark developed "Mosaic Silhouette" technology using unmanned Micro-Branches to provide full service for your members, while simultaneously being connected to the core system, and furthermore allowing you to customize the design and functionality for each unit.

Symform vs. Symform PDF Symform vs. SymformPDF: Do we convert to SymformPDF? This will be a point-counter-point discussion open to all participants whether to convert to SymformPDF.	**Mike Blumenthal** – Technology Happens
PowerOn Marketplace • Update of the new marketplace which includes vendor submissions and paid solutions • How the paid solutions are charged, and credited to the submitters • How submissions are supported, either by submitter, or by Symitar • Client solution requests	**Kevin Walter** – Symitar Kevin is the PowerOn Marketplace Product Manager for Symitar. Kevin has been with Symitar for 4 months, and has over 18 year's credit union software experience. 12 of those years were spent as a developer and manager at MSUFCU, and most recently, 4 years with Cutek as a consultant and developer. Kevin's responsibilities with Symitar include managing the Marketplace, and working with credit unions, and vendors, to review and implement submissions.
Seizing the Business Lending Opportunity, Why the Time is Right for Credit Unions and their Members Three trends have been evolving over the past ten years that have resulted in the significant opportunity for credit unions to enter and/or expand business lending efforts. These trends include the decrease in commercial loan growth amongst banking institutions, a significant increase in busi-ness loan growth by credit unions, and an overall increase in business loan demand in the U.S. economy in spite of the economic downturn in 2008. • From March 2010-March 2012, total loans by banks declined by $500 billion. • In comparison, from March 2010-March 2012, total loans by Credit Unions increased by $11 billion. In large part banks are losing the commercial lending market share due to frustrated business borrowers, inefficient lending processes, and lengthy loan closing times. Whereas credit un-ions are uniquely positioned to strengthen member relationships and value through business lending, increase loan volume and wallet share, and offset the slower demand for consumer credit, all while further supporting their local communities. Making this opportunity even more substantial is the fact only .5% of credit unions are anywhere near the current 12.75% business loans to asset lending cap. A number of case studies have been compiled to illustrate the business lending opportunity and best practices. Northwest Federal Credit Union (NWFCU) is headquartered in Herndon, VA and has an asset size of $2.5 billion with 7 branches and 308 employees. NWFCU serves 129,000 mem-bers and in 2013 received the approval to become an SBA lender. Over the past four years NWFCU has been able to expand commercial lending efforts, and offer another product and service to their members, which has become the biggest source of loan growth and the most profitable type of loan for NWFCU.	**Jonathan Rowe, PhD** – nCino Jonathan Rowe is the Director of Research and Marketing at nCino and has been studying and analyzing the financial ser-vice industry for ten years including previously as a professor at the University of North Carolina Wilmington's, Cameron School of Business. He has presented his business lending research and analysis to over thirty Credit Unions, has co-authored fourteen articles and whitepapers on these topics, and his doctoral research involved business lending practices in Asia Pacific countries. As director of research and marketing at nCino he is responsible for all analyzing and tracking busi-ness lending statistics and trends, and is also responsible for the nCino brand, media, and strategic marketing efforts includ-ing nCino University.
PowerOn Roundtable During the powerOn round table we will discuss how you can use powerOn to stream line process and glean the most out of the symitar system. I will be asking everyone how you use powerOn, as well as what are some of the wonderful things you have been able to accomplish with it for your credit unions.	**Michael Orozco** - Programming Specialist Health Care Associates Credit Union Michael started in the credit union industry in 1998 as a teller, before this he was a Chef/Cook and served four years in the Air Force. While at Community First Credit Union, he held several positions before he entered into the tech industry, including FRS, loan officer, branch supervisor, indirect supervisor and part time programmer. Between 2001 and 2006 Michael ran the IT department as IT manager. Michael served as CIO for NuMark credit union from 2006 to 2011. For the past

	three years, Michael has been a programming specialist at HealthCare Associates credit union, during these three years Michael has learned both JavaScript and jquery to bring more functionality to HTML post back powerOns.
The Future of Document Processing Save BIG with Make A Statement! Learn how Make A Statement allows credit unions to save drastically on both print and eDocuments. The Make A Statement product organizes statements, tax forms and notices within one flexible web based tool. Watch how you can take control of marketing and quickly test changes to your statement marketing campaigns. In addition to statement and tax form processing, Make A Statement is a powerful notice processing engine that combines multiple different notice types into single notices, saving on printing and postage costs (also providing the option to household your print notices to save on postage). Step outside the printer provided processing box and experience the future of document processing	**Patrick Arthurs** - IMS Integration Patrick Arthurs has been developing solutions for credit unions for 13 years. With a Bachelor's degree in Computer Engineering and a Master's in Computer Science, he started out as an application developer at a small credit union. He became VP of IT and from there went on to help found IMS Integration. Patrick is an Irish immigrant with a love for travel and sports.
Security Trends in 2014 and How to Combat them!	**David Hobbs** – Senior Security Architect with Radware
The Benefits and Options for Supporting Telecommuting An expert from Adapt delivers tips and tactics for supporting your remote credit union employees. Remote workers can help your credit union lower its costs, improve employee retention if their family relocates and aid in faster recovery during and following a disaster	**Chris Adomaitis** - Adapt Telephony Services Chris Adomaitis is a Senior Sales Engineer with Adapt Telephony Services. Since 2000, he has designed, implemented and diagnosed complex and evolving contact center infrastructures for credit unions and other organizations that win by moving faster, adding more value for members and out-innovating the competition. Chris answers technical questions, offers demonstrations and works in concert with Adapt's account managers and sales representatives. He has devoted extensive time migrating legacy technology to VoIP. Chris has attended both Wayne State University and Western Michigan University. Chrism@teamadapt.com
Cards Roundtable The PPS Roundtable session will include a high-level overview of the Symitar PPS solution for credit, debit and ATM processing as well as the latest updates on EMV chip card support, new fraud services, cardholder rewards and the PPS 24x7 member support service. Session will conclude with any questions from the credit union participates.	**Duane Schweiss** - Symitar Duane is a sales executive for Symitar Payment Processing Solutions. He has worked in the Payment Industry for 22 years, the last 8 years with Symitar, providing in-house credit, debit and ATM processing solutions to the Episys client base.
Testing 123 Presentation followed by Roundtable During Testing 1, 2, 3: Three Strategies for Successful Release Testing, we will explore the new and improved *For Clients* portal, learn where you can access Symitar tools to aid you with testing, and explore three testing strategies that will get you from testing the new release to loading the new release into production. This presentation will be followed by a Beta round table to facilitate open discussion and answer any questions you have on our Alpha and Beta testing opportunities.	**Amanda Campos** - Symitar Amanda Campos works on the Software Acceptance Management Team (SAM) as Application Analyst. She came to Symitar 10 years ago after three years with a financial institution.
OpCon Roundtable If you use OpCon come around the table to ask your questions of others that use it too! Also share your experiences, tips and challenges. It's an informal session that will go wherever you want the discussion to go.	**Stacey Darr** - Systems Coordinator Interra Credit Union **RK Borden** - VP Information Technology Blackhawk Community CU **Kail Neuman** – Symitar **Todd Dauchy** - CTO of SMA