



**CITY OF DANIA BEACH
FINANCE DEPARTMENT
MEMORANDUM**

TO: Honorable Mayor Pat Flury
Honorable Vice-Mayor C.K. McElyea
Honorable Commissioner Anne Castro
Honorable Commissioner Water B. Duke, III
Honorable Commissioner Bobbie Grace

FROM: Robert Baldwin, City Manager

BY: Mark Bates, Finance Director

DATE: August 14, 2012

SUBJECT: Annual Conference – New World Systems

New World Systems is holding their National Users Conference this September in Chicago, IL. The Finance Department recommends Commission approval to allow the Assistant Finance Director and Controller to attend this annual conference.

Our Assistant Finance Director, Nicki Satterfield, a licensed CPA working with our City for 9 years, was instrumental in creating the new, on-line Water / Sewer payment process and customer account information access. Nicki is also leading the new wireless work-order system that will allow City field staff to receive and complete work assignments electronically, eliminating the past paper process and repeated trips to City Hall.

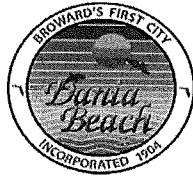
Our Controller, Cori Mayo, completed her undergraduate Accounting degree and her Master's degree while working with the City during the past 2 ½ years. Ms. Mayo is just now finishing her CPA exams has been instrumental in the setup of Payroll, Financials, and Misc Billings in the ERP system and also handles our City grants, asset accounting and financial reporting.

Attending the conference will allow Finance managers to learn from other government users what further and perhaps better opportunities are available in the expanding use of our New World Systems ERP system.

The following is a summary of the cost of the conference:

Estimated cost of the conference: \$3,906

Sufficient funding is available in the approved Finance Department budget to attend this conference.



**CITY OF DANIA BEACH
PRE-APPROVED CONFERENCE OR TRAINING AUTHORIZATION/RECONCILIATION**

EMPLOYEE: Nicki Satterfield DEPARTMENT: Finance
LOCATION: Chicago, IL TRIP/TRAINING DATE: September 23-25
PURPOSE: New World Systems User Conference 2012

Overnight Out of State Air Travel

TRAVEL EXPENSES ESTIMATED: (Policy #2002-10-1)

REGISTRATION (attach conference brochure)	\$ 945.00	(Includes 2 nights h without 2 nights lod
LODGING (# of nights <u>2</u>)	551.61	(Additional night
MEALS (per diem)	106.50	
OTHER INCIDENTAL EXPENSES:		
AIRFARE	300.00	
GAS/TOLLS (round trip)	-	
OTHER TRANSPORTATION (Shuttle/Taxi/Parking)	50.00	
SUPPLIES/MATERIALS	-	
TOTAL ESTIMATED EXPENSES:	\$ 1,953.11	

This seminar is required for: Certification General Training
 License Other X _____

Note any overnight or out of state travel events attended in the last 12 months:

GFOA Conference June 2012

Employee Signature: Nicki Satterfield

TRAVEL AUTHORIZATION:

Department Director

Mark Pitt 7/25
Finance Director

City Manager

If payment is made through City's credit card, please indicate "credit card" under "Date" Column

	Check Payee:	Amount:	Date:	RECONCILIATION	
				Actual	Differences
Registration:		-			
Lodging:					
Transportation:					
Traveler:					
Others:					
Account #:	001-1701-513-55-10	\$ -			

Name: Nicki Satterfield
Location: Chicago, IL
Purpose: New World Systems

M&IE

IRS Pub 1542 **\$71.00** (obtain from Per diem form on City's Intranet)
 Conference Hours

	Saturday Travel Day *9/22/2012	Sunday 1:00-4:50 *9/23/2012	Monday 8:20-5:00 9/24/2012	Tuesday 8:30-5:00 9/25/2012	Wednesday Travel Day *9/26/2012	Total Est Exps
Meal Provided:						
Per Diem	\$ 53.25	\$53.25	\$0.00	\$0.00	\$ 53.25	\$ 106.50
Lodging						-
Gas/Tolls/Parking						-
Conf Fees						-
Airfare/Car Rental						-
						\$ 106.50

*** Travel day**

per diem reductions

Breakfast (B) 15% **\$10.65**
 Lunch (L) 35% **\$24.85**
 Dinner (D) 50% **\$35.50**



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MEALS (per diem)	<u>106.50</u>	
OTHER INCIDENTAL EXPENSES:		
AIRFARE	<u>300.00</u>	
GAS/TOLLS (round trip)	<u>-</u>	
OTHER TRANSPORTATION (Shuttle/Taxi/Parking)	<u>50.00</u>	
SUPPLIES/MATERIALS	<u>-</u>	
TOTAL ESTIMATED EXPENSES:	\$ 1,953.11	

This seminar is required for: Certification General Training
 License Other X _____

Note any overnight or out of state travel events attended in the last 12 months:
Orlando - October 2011 - Time For Kids Grant
 Employee Signature: *Cori Mayo* 7/18/12

TRAVEL AUTHORIZATION:
 _____ *Mark B...* _____
 Department Director Finance Director City Manager

If payment is made through City's credit card, please indicate "credit card" under "Date" Column

	Check Payee:	Amount:	Date:	RECONCILIATION	
				Actual	Differences
Registration:		-			
Lodging:					
Transportation:					
Traveler:					
Others:					
Account #:	<u>001-1701-513-55-10</u>	\$ -			



2012
CHICAGO

NEW WORLD SYSTEMS * * * *

EXECUTIVE CUSTOMER CONFERENCE

WWW.NEWWORLDSYSTEMS.COM/2012CONFERENCE/PUBLICADMIN

SEPTEMBER 23-25



New World Systems[®]

MAXIMIZE YOUR TECHNOLOGY INVESTMENT

Learn how to increase efficiency and get the most out of your Logos solution investment at New World Systems' 2012 Executive Customer Conference. Join hundreds of your colleagues at the Sheraton Chicago Hotel & Towers in Chicago, Illinois for two-and-a-half days of educational software sessions, hands-on training, valuable networking, and face-to-face meetings with New World team members.

SESSIONS FOR EVERYONE IN YOUR ORGANIZATION

- More than 100 Educational Sessions to choose from for Finance, HR, Utility Management, Community Development, Technology and Executive topics
- Whether you are looking for a high-level overview or a more detailed discussion, introductory 100-level and advanced 200-level Logos.NET sessions ensure you get the most helpful information
- Attend Logos.NET technology sessions focused on new topics including Integration Services, Windows and SQL Server, System Administration, SSRS Reporting and the eSuite Environment
- Improve the use of your solutions and refine business processes during Best Practices sessions for FM, HR, UM, CD, and Business Analytics & Decision Support
- Learn about the latest solution enhancements, new software, and productivity tips & tricks during Product Overview sessions

HANDS-ON EXPERIENCE & TRAINING

- Choose from a variety of Hands-On Labs with 17 all-new lab sessions
- Explore Logos Decision Support and learn how to get more information from your software with improved reporting, analysis and trending
- Use FM, HR, CD and UM best practices techniques, practice effective reporting, and learn how to avoid common mistakes in a hands-on environment
- Get your questions answered and work through introductory and advanced SSRS reporting
- Sit down with New World Solution Architects and learn how to customize Logos.NET

CPE CERTIFICATION

- Choose from more than 25 educational sessions offering CPE credits
- Easily earn one CPE credit per session with topics including Finance, HR, Technology, Utility Management, SSRS Reporting and Decision Support



REGISTER TODAY

WWW.NEWWORLDSYSTEMS.COM/2012CONFERENCE/PUBLICADMIN



FOCUSED SUPPORT & NETWORKING

- Bring topics to discuss with more than 60 New World team members on site
- Sign up for One-on-One Consultations. Meet with New World Executive Management, Professional Services, Customer Support teams, and your Customer Care Manager, view a product demonstration or share ideas with New World's development team
- Attend customer-led presentations to hear how other New World users are taking advantage of software and technology
- Visit the Ask the Expert desk to get your questions answered by New World Subject Matter Experts covering the full suite of Logos solutions
- After busy days packed with sessions, join New World team members and colleagues for good food, entertainment and networking on Sunday evening during the Meet & Greet Welcome Dinner and Monday evening during the Peer-2-Peer Networking Event at Chicago's famous Navy Pier

NEED MORE JUSTIFICATION?

New World understands that many budgets are tight and obtaining approval for travel, even as beneficial as this, can be a challenge. In response to these difficult times, we have added more value to the 2012 Conference without raising the cost to attend. To help your organization be a part of this year's conference, we are offering a Justification Letter that may help you explain your need to attend.

VISIT THE CONFERENCE WEBSITE to download a Microsoft Word version of this letter, and customize it for your specific needs.

HOTEL INFORMATION

- **Sheraton Chicago Hotel & Towers**

301 East North Water Street - Chicago, IL 60611
Phone: 877-242-2558
www.sheratonchicago.com

- **Parking**

The Sheraton Chicago Hotel & Towers parking fee is \$37 for self-park and \$49 for valet, per day.

TRANSPORTATION

25-35 minutes to and from the airport

- **Taxi: \$25-\$45**

(per trip) from O'Hare International Airport (ORD) or Midway International Airport (MDW)

- **Train: \$2.25 One-Way** (www.transitchicago.com/maps/) "CTA"- Blue line or Orange Line

- **Shuttle: \$20-\$25** (AirportExpress.com or 888-284-3826) (per trip) from O'Hare International Airport (ORD) or Midway International Airport (MDW) departing every 10-20 minutes.

CONFERENCE COSTS

- **Package A: \$945**

Includes two (2) nights (Sunday & Monday Night) at the Sheraton Chicago Hotel & Towers, conference registration, meals and all conference activities

- **Package B: \$795** (Lodging not included)

Includes conference registration, meals and all conference activities.

- **Provided Meals**

SUNDAY: Dinner will be provided Sunday night at the Meet and Greet Welcome dinner

MONDAY: Full Breakfast and Lunch with Dinner provided at the Peer-2-Peer Networking event.

TUESDAY: Full Breakfast and Lunch will be provided.

- **Additional Nights**

New World will book the room for you. You will be responsible for the cost of the additional nights and will pay the hotel directly when you check out.

Additional night stay is **\$239.00 + 15.4% Tax** NOTE: there are limited rooms available. We will try to accommodate but will honor on a first come, first serve basis. Thank You.

CONFERENCE SESSIONS

- **September 23, Sunday:** 1:00 p.m. - 5:00 p.m.
- **September 24, Monday:** 8:00 a.m. - 5:00 p.m.
- **September 25, Tuesday:** 8:30 a.m. - 5:00 p.m.

Sunday, September 23, 2012

			MICHIGAN A	MICHIGAN B	BALLROOM X	BALLROOM VII	SUPERIOR A/B	ERIE	ONTARIO	
1:00 - 1:50 p	Demo Rooms: COLORADO MISSOURI	Introduction to eSuite	Introduction to eSuite	Introduction to SSRS		Financial Analysis Using Decision Support	HR / Payroll Best Practices	1st Time Attendee Orientation	iSERIES Q&A Lab	
2:00 - 2:50 p			Consultation Rooms: OHIO MISSISSIPPI ARKANSAS	FM Decision Support	HR Best Practices		UM Analysis Using Decision Support	Using Excel for FM Reporting	Understanding Your eSuite Environment	iSERIES Q&A Lab
3:00 - 3:50 p			Ask the Expert FOYER	UM Decision Support	Advanced SSRS Topics		System Administrator Refresher Training	CD Best Practices	HR / Payroll Analysis Using Decision Support	iSERIES Q&A Lab
4:00 - 4:50 p				HR Decision Support	CD Best Practices		Logos.NET Overview for IT Professionals	Advanced Budget Preparation	The NEW Logos.NET Support Center	iSERIES Q&A Lab
6:00 - 9:00 p			MEET & GREET / REGISTRATION ----- SHERATON BALLROOMS IV & V							

Monday, September 24, 2012

			MICHIGAN A	MICHIGAN B	BALLROOM X	BALLROOM VII	SUPERIOR A/B	ERIE	ONTARIO		
6:30 - 8:00 a			CONTINENTAL BREAKFAST ----- SHERATON BALLROOMS VIII & IX								
8:20 - 10:00 a	Opening Session										
			KEY ■ iSERIES Sessions ■ Open to All ■ .NET Sessions ■ Customer Led Sessions ■ Lab Sessions ■ Consultation/Product Demos ■ .NET Tech Sessions ■ Repeated Sessions (10:10)								
			FM — Financial Management CD — Community Development UM — Utility Management eSuite — eGov Application HR — Human Resources C — CPE Certified Class								
			GRAND VI								
10:10 - 11:00 a	Demo Rooms: COLORADO MISSOURI	Introduction to Decision Support	Introduction to eSuite	Introduction to SSRS	Asset Management Module Overview	UM Best Practices	Maintaining Your Environment	Applying for Grant Funds	iSERIES UM Overview		
11:10 - 12:00 n			Consultation Rooms: OHIO MISSISSIPPI ARKANSAS	FM Best Practices	UM Best Practices	Preparing for HR Next Gen	CD Analysis Using Decision Support	Performance Monitoring	iSERIES Migration Success Stories	iSERIES Q&A Lab	
12:00 n - 1:00 p			LUNCH ----- SHERATON BALLROOMS VIII & IX								
1:10 - 2:00 p			Ask the Expert FOYER	Technology Roadmap	CD Decision Support	Advanced SSRS Topics	Project Accounting Module Overview	UM General Ledger Reconciliation	Integration Services		iSERIES FM Overview
2:10 - 3:00 p		HR Next Gen Migration Success Stories	HR Best Practices	FM Best Practices	What's New in CD	Financial Analysis Using Decision Support	Best Practices in Windows/SQL		iSERIES Getting the Most Out of FM		
3:10 - 4:00 p		What's New in HR / Payroll	FM Decision Support	CD Best Practices	Technology Advisory Group	UM Analysis Using Decision Support	Directions in Logos.NET Documentation	Deploying Decision Support & Business Analytics	iSERIES Q&A Lab		
4:10 - 5:00 p		FM Dynamic Reports	UM Decision Support	FM Best Practices		iSERIES Migration to Logos.NET Planning	Technology for the Non-Technologist	OPEN TOPIC Forum	iSERIES Q&A Lab		
6:00 - 10:00 p			PEER TO PEER NETWORKING EVENT ----- NAVY PIER / OFF-SITE								

Tuesday, September 25, 2012

			MICHIGAN A	MICHIGAN B	BALLROOM X	BALLROOM VII	SUPERIOR A/B	MAYFAIR	ONTARIO		
7:00 - 8:15 a			CONTINENTAL BREAKFAST ----- SHERATON BALLROOMS VIII & IX								
8:30 - 9:00 a	Awards										
			GRAND VI								
9:10 - 10:00 a	Demo Rooms: COLORADO MISSOURI	Strategic Directions in Logos.NET	FM Dynamic Reports	Customizing Logos.NET	Strategic Directions in UM	CD Analysis Using Decision Support	Maintaining Your Environment	OPEN TOPIC Forum	iSERIES HR Overview		
10:10 - 11:00 a			Consultation Rooms: OHIO MISSISSIPPI ARKANSAS	FM Year End Best Practices	FM SSRS	eUtility Module Overview	HR / Payroll Analysis Using Decision Support	Leveraging Integration Technologies	Maximizing the Logos.NET Support Center	iSERIES Getting the Most Out of HR	
11:10 - 12:00 n			Ask the Expert FOYER	Preparing for & Installing Updates	HR Decision Support	UM Best Practices	Benefits Administrator & eBenefits Module Overview	Integrated Credit Card Processing & ePayments	Mobile Applications	OPEN TOPIC Forum	iSERIES Q&A Lab
12:00 n - 1:00 p			LUNCH ----- SHERATON BALLROOMS VIII & IX								
1:10 - 2:00 p		HR Year End Best Practices	FM Dynamic Reports	HR SSRS		Strategic Directions in CD	Logos.NET Overview for IT Professionals	OPEN TOPIC Forum	iSERIES Directions		
2:10 - 3:00 p		Ideas - The Software Suggestion Process	FM Year End Best Practice	HR Year End Best Practices		Position Budgeting Module Overview	CD Best Practices	OPEN TOPIC Forum	iSERIES Q&A Lab		
3:10 - 4:00 p		Customer for Life	Decision Support Advanced Techniques	CD Best Practices		iSERIES Migration to Logos.NET - Planning	Technology for the Non-Technologist	OPEN TOPIC Forum	iSERIES Q&A Lab		
4:10 - 5:00 p						Systems Administrator Refresher Training	Understanding Your eSuite Environment	OPEN TOPIC Forum	iSERIES Q&A Lab		