


# Conference Agenda - Day 1

**Qualtrax User Conference** | September 23-25, 2014

The Inn at Virginia Tech and Skelton Conference Center in Blacksburg, VA

<b>TUESDAY, SEPTEMBER 23</b>	
7:30 AM – 8:30 AM : <b>Registration &amp; Continental Breakfast - Alumni Center, Ground Floor</b>	
8:30 AM – 10:00 AM - <b>ASSEMBLY HALL (Alumni Center, Ground Floor)</b>	
<b>May the Force Be with You: Qualtrax Organization Review</b>	
<p>During this time, the Qualtrax team will bring you up to speed on what is new in the organization and what you can be looking forward to in future releases. This is also a great time for you to hear directly from our product manager.</p>	
10:00 AM – 10:15 AM : Intermission	
10:15 AM – 11:00 AM: <b>Keynote</b>	
<b>Cloud City, Demystified: Rackspace Keynote</b> <i>New!</i>	
Thomas Weeks, Technical Community Evangelist	
<p>An educational session about our host provider and Fortune 100 company, Rackspace. Come learn about the Rackspace approach to fanatical support, cloud technology, compliance, and security.</p>	
11:00 AM - 11:30 AM: Intermission - Announcements and Move to Upstairs Conference Area	
11:30 AM – 12:30 PM: <b>Concurrent Sessions (Choose One) - UPSTAIRS CONFERENCE AREA</b>	
<b>THEATRE 1</b>	<b>Standards and Audits and Assessors, Oh My!*</b> <i>New!</i> <i>Susie Honza</i> <p>Are you getting ready for an upcoming audit? Learn how to use Qualtrax to prepare for and pass your audits. We will cover running and creating pertinent reports, using the header footer tool to ensure all procedures have the required information, using standards to prepare for audits, using the testing/training features, and utilizing the document compare module.</p>
	<b>Qualtrax University: Reporting*</b> <i>Patrick Hatcher</i> <p>We will review reporting capabilities and discuss which reports benefit you the most before and during an audit. You will learn about the creation of reports, scheduling report instances, and get guidance around using reports more effectively.</p>
	<i>[See next page for third option]</i>

\* Denotes a session that is offered again during the conference.

<b>THEATRE 3</b>	<p><b>Lost in Translation: Help, I'm New</b> <i>Jennifer Mecca</i></p> <p>Are you new to the product or lack the confidence that a power user has? If you don't quite speak the language, you've come to the right place. This is a great time to interact with other users and members of our team so you can walk away from this conference with a greater understanding of the software.</p>
12:30 PM – 1:30 PM : Lunch	
<b>THEATRE 1</b>	<p><b>Qualtrax University: Document Control*</b> <i>Susie Honza</i></p> <p>Are you new to Qualtrax? Need some refresher training on how to BEST use the Document Control features of Qualtrax? This is the session for you! Learn how to prep your documents before importing them, what options are available when importing documents, and how to manage document Custom Fields for reporting and searching.</p>
<b>THEATRE 2</b>	<p><b>Qualtrax University: Testing and Training*</b> <i>Patrick Hatcher</i></p> <p>Understand how the testing and training functionality helps you show employee proficiency to auditors and satisfy regulatory standards for document revisioning.</p>
<b>THEATRE 3</b>	<p><b>Customer Spotlight: J. Rettenmaier</b> <i>New!</i> <i>Paula Rumsey, QA Tech   "The Queen"</i></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: right;"> <p><b>J. RETTENMAIER USA LP</b></p> </div> <div style="text-align: center;">  </div> </div> <p>J. Rettenmaier USA LP creates cellulose fibers for food industries, products in our home, from medicines to vitamins to innovative plastics. Paula will be presenting how she uses Qualtrax for audit preparation. Come learn her strategies from "the Queen" herself.</p>
2:30 PM – 2:45 PM : Intermission	
2:45 PM – 3:45 PM: Concurrent Sessions (Choose One)	
<b>THEATRE 1</b>	<p><b>One Block at a Time: The Basics of Workflow Building* (Part 1 of 2)**</b> <i>Jennifer Mecca</i></p> <p>Come learn the basics and benefits of utilizing workflows in your system. Our team provides an overview of workflow creation and we will build a basic workflow together to prepare you for the additional ½ day of workflow training. Please stay for part 2 of this session.</p>
<b>THEATRE 2</b>	<p><b>Up! Up! And Away!: The Qualtrax Cloud*</b> <i>New!</i> <i>Jennifer Havens and Rodney Richard</i></p> <p>Come see the Qualtrax Cloud in action! You will learn new product changes as a result of the cloud, implementation differences, benefits to using the cloud, and review how you can implement it at your site.</p>
[See next page for third option]	

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<b>THEATRE 3</b>	<p><b>Learning Lounge*</b> <i>Qualtrax Team</i></p> <p>Schedule time in the Learning Lounge to speak with a team member. Pre-conference sign-up requested.</p>
3:45 PM – 4:00 PM : Intermission	
4:00 PM – 5:15 PM: Concurrent Sessions (Choose One)	
<b>THEATRE 1</b>	<p><b>One Block at a Time: The Basics of Workflow Building* (Part 2 of 2)**</b> <i>Jennifer Mecca</i></p> <p>Come learn the basics and benefits of utilizing workflows in your system. Our team provides an overview of workflow creation and we will build a basic workflow together to prepare you for the additional ½ day of workflow training.</p>
<b>THEATRE 2</b>	<p><b>Qualtrax University: Using Templates* <i>New!</i></b> <i>Susie Honza</i></p> <p>Learn how to create, edit, and (more importantly) use templates to manage your documents in Qualtrax using the new Header Footer Updater. See how built in and custom Environment Variables are applied, and learn how and when you see those changes when editing documents.</p>
<b>THEATRE 3</b>	<p><b>50 First Dates: Panel Discussion* <i>New!</i></b> <i>Qualtrax Team</i></p> <p>Imagine speed dating, but done Qualtrax style. As you move from table to table, you'll learn all kinds of helpful information from both the Qualtrax team and customers.</p>
6:00 PM - 10:00 PM: Hahn Garden Dinner <i>New Location!</i>	
<p>Join us for a casual dinner at the beautiful Hahn Garden on Virginia Tech's campus! The garden is just a minute's drive from the Inn at Virginia Tech, or about 10-15 minutes walking. There will be live music, food, drinks, and (of course!) cornhole!! Not familiar with cornhole? Come on out and we'll show you how it's done. A hotel shuttle is available for those who need a ride.</p>	

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\*\* Required session for those attending additional half-day. Proficient workflow users exempt.

# Conference Agenda - Day 2

WEDNESDAY, SEPTEMBER 24	
7:30 AM – 8:00 AM : Continental Breakfast	
8:00 AM – 9:00 AM: Concurrent Sessions (Choose One)	
<b>THEATRE 1</b>	<p><b>One Block at a Time: The Basics of Workflow Building (Part 1 of 2)**</b>  <i>Jennifer Mecca</i></p> <p>Come learn the basics and benefits of utilizing workflows in your system. Our team provides an overview of workflow creation and we will build a basic workflow together to prepare you for the additional ½ day of workflow training. Please stay for part 2 of this session.</p>
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9:00 AM - 9:15 AM: Intermission	
9:15 AM – 10:00 AM: Concurrent Sessions (Choose One)	
<b>THEATRE 1</b>	<p><b>One Block at a Time: The Basics of Workflow Building (Part 2 of 2)**</b>  <i>Jennifer Mecca</i></p> <p>Come learn the basics and benefits of utilizing workflows in your system. Our team provides an overview of workflow creation and we will build a basic workflow together to prepare you for the additional ½ day of workflow training.</p>
<b>THEATRE 2</b>	<p><b>Customer Spotlight: Alpha Analytical</b> <i>New!</i>  <i>Rene Bennett, Quality System Specialist</i></p> <div style="text-align: right;">  </div> <p>Alpha Labs provides analytical testing worldwide and ranks 8th among the top environmental laboratories in the country. Rene Bennett will be sharing from her experiences with Qualtrax in an environmental testing lab environment.</p>
<b>THEATRE 3</b>	<p><b>Company Review of System: McKee Foods</b> <i>New!</i>  <i>Patrick Hatcher and Deanna Felton</i></p> <p>This session is tailored specifically for McKee Foods employees.</p>

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10:00 AM – 10:15 AM : Intermission	
10:15 AM – 11:00 AM: Concurrent Sessions (Choose One)	
<b>THEATRE 1</b>	<p><b>Qualtrax University: Reporting</b> <i>Patrick Hatcher</i></p> <p>We will review reporting capabilities and discuss which reports benefit you the most before and during an audit. You will learn about the creation of reports, scheduling report instances, and get guidance around using reports more effectively.</p>
<b>THEATRE 2</b>	<p><b>Houston, We Have a Problem</b> <i>New!</i> <i>Deanna Felton and Chris Hicks</i></p> <p>Learn how we support you today. See our ticket system and learn about the key items we are looking for to resolve tickets as quickly as we can with high quality. Follow our process and hear how we incorporate preventative actions into our definition of done. Understand how we integrate retrospectives and post mortems into our customer support process to provide you the best service possible.</p>
<b>THEATRE 3</b>	<p><b>Up! Up! And Away!: The Qualtrax Cloud</b> <i>New!</i> <i>Jennifer Havens and Rodney Richard</i></p> <p>Come see the Qualtrax Cloud in action! You will learn new product changes as a result of the cloud, implementation differences, benefits to using the cloud, and review how you can implement it at your site.</p>
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<b>THEATRE 1</b>	<p><b>Qualtrax University: Testing and Training*</b> <i>Susie Honza</i></p> <p>Understand how the testing and training functionality helps you show employee proficiency to auditors and satisfy regulatory standards for document revisioning.</p>
<b>THEATRE 2</b>	<p><b>Customer Spotlight: NSK, Ltd.</b> <i>New!</i> <b>Best Practices for Administrating Qualtrax</b> <i>Martin Conron, Management Representative for Quality - EIBU &amp; GS</i></p> <div style="text-align: right;">  </div> <p>Martin Conron, from NSK, Ltd. is joining us to provide a case study on the best practices for managing Qualtrax from an enterprise administrator's perspective.</p>
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12:30 PM – 1:30 PM : Lunch	
1:30 PM – 2:30 PM: Concurrent Sessions (Choose One)	
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<b>THEATRE 2</b>	<p><b>Customer Spotlight: Tarrant County Medical Examiner’s Office</b> <i>New!</i> <i>Dr. Susan Howe, Crime Lab Director</i></p> <div style="text-align: right;">  <p>TARRANT COUNTY MEDICAL EXAMINER</p> </div> <p>Dr. Susan Howe from Tarrant County, will present on the use of Qualtrax software to build and manage an ISO/IEC 17025 compliant management system in a forensic laboratory environment. Effective strategies will be presented for document management, document tree setup, electronic process management within Qualtrax workflows, and utilizing Qualtrax in communications with external assessors. The benefits gained through the use of Qualtrax Cloud hosting will also be discussed.</p>
<b>THEATRE 3</b>	<p><b>50 First Dates: Panel Discussion</b> <i>New!</i> <i>Qualtrax Team</i></p> <p>Imagine speed dating, but done Qualtrax style. As you move from table to table, you’ll learn all kinds of helpful information from both the Qualtrax team and customer presenters.</p>
2:30 PM – 2:45 PM : Intermission	
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<b>THEATRE 1</b>	<p><b>Customer Spotlight: ASCLD/LAB and Qualtrax</b> <i>New!</i> <i>John Neuner, Executive Director and Ken Vaughan, Product Manager</i></p> <div style="text-align: right;">  </div> <p>John Neuner, ASCLD/LAB’s Executive Director, will outline their partnership with Qualtrax and the impact the Accreditation Portal project brings to their lab customers. Ken Vaughan, Qualtrax Product Manager, will detail why this is so important for all Qualtrax customers, and particularly touch on the efficiencies and automation it brings for Forensics labs. <i>Spoiler Alert: You’ll love this session!</i></p>

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# Conference Agenda - Day 2

<b>THEATRE 2</b>	<p><b>A Whole New World</b> <i>New!</i> <i>Patrick Hatcher</i></p> <p>Come see what's new in Qualtrax since our last User Conference. Did you just recently upgrade your system or are you waiting to upgrade because you want to learn more about new features? This is a great session to learn about all the cool new features with a focus on the latest updates!</p>
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## 4:45 PM - 5:00 PM: Conference Conclusion

Thank you for joining us for this year's Qualtrax user conference. We're so glad you were able to join us. Please fill out a survey on your way out, even if you are staying for the additional half day of training:

**<https://qualtrax.wufoo.com/forms/2014-quc-survey/>**

If you are staying for additional training, we'll see you tomorrow. We hope to see you all again next time.

## 5:00 PM - 6:00 PM: Cocktail Reception

### **Cocktail Reception**

Join the Qualtrax team for drinks in the courtyard area of main floor of the hotel. We will move to an indoor ballroom if weather does not cooperate. Never fear! Drinks will be served one way or another.



**Additional User Training | September 25, 2013**  
The Inn at Virginia Tech and Skelton Conference Center in Blacksburg, VA

**THURSDAY, SEPTEMBER 25**

7:30 AM – 8:00 AM : **Continental Breakfast**

8:00 AM – 12:30 PM: **Concurrent Sessions (Choose One)**

*A break will be given from 10:30 AM – 10:45 AM.*

**Qualtrax University: Workflow Building Workshop**

This additional half day of comprehensive training is for users who would like additional time building workflows with the help of the Qualtrax team.

**Prerequisite:** A working knowledge of workflow creation or attendance at Workflow Sessions 1 & 2 (offered on Day 1 of the conference) is required.

12:30 PM – 1:30 PM : **Lunch & Travel**

Please fill out the additional training survey on your way out:

**<https://qualtrax.wufoo.com/forms/2014-quc-additional-training/>**

See you next time!