infogix

Annual Conference

Chicago Marriott Downtown Magnificent Mile
Chicago, Illinois ◆ September 11-14, 2006

Evolving to Enterprise Controls

www.infogix.com/conference ◆

Learn how to Automate Controls Across Your Enterprise at Our 2006 Annual Conference

This year's theme, *Evolving to Enterprise Controls*, addresses the industry's desire for long-term strategies and approaches to automate information controls across the enterprise. Through two and a half days of thought provoking customer "best practice" panels and information packed breakouts, you can dive into the details of the issues that you care about most. This event serves executives, managers, and professionals who want to take control of their operational risk and regulatory compliance issues. And make the most of their Infogix investment.

Why You Should Attend

Last year's Conference was a huge success. And, we're setting our sights even higher this year! In 2006, you'll hear major product announcements and choose from four information packed breakout tracks. And much more.

➡ Learn best practices for automated controls from your peers and Infogix experts.

➡ Find out about standards for enterprise information controls and what they can do for you.

➡ Investigate organizational strategies for supporting controls.

➡ Hear how to apply controls to key industry standards.

➡ Discover success strategies for enterprise controls to assure accurate information and mitigate risks.

➡ Explore techniques and tactics you can use to ensure long-term controls implementation success.

The Infogix Annual Conference also gives you the opportunity to learn what's new – and what's coming soon – with our product roadmaps, and our company. If you care about automated controls – this event is for you!

Don't Delay – Register Today

Make your plans to attend now. This event will take place September 11-14, 2006, at the Chicago Marriott Downtown Magnificent Mile. And, as a valued Infogix customer, you can attend this event – a $795 value – at no cost.

The 11th Annual
Excellence in Information Integrity Award

September 13, 2006 ◇ 6:00 p.m. ◇ Chicago, Illinois

Join the Information Integrity Coalition as they recognize this year's EII Award winner – as well as companies that have achieved excellence in the following areas.

◈ Leadership.
◈ Quality Improvements.
◈ Profitability.
◈ Innovation.
◈ Improved Customer Satisfaction.

Get the Recognition You Deserve
For information on past winners and how to nominate or self-nominate a company for its commitment to ensuring the accuracy, consistency, and reliability of its information, please visit www.eiiaward.org

Monday, September 11, 2006

6:00 p.m. - 8:00 p.m.	Conference Welcome Reception and Registration

Tuesday, September 12, 2006

9:00 a.m. - 9:15 a.m.	Conference Opening and Welcome: Madhavan Nayar, Infogix
9:15 a.m. - 9:45 a.m.	Infogix Market Views: Rick Barkal, Infogix
9:45 a.m. - 10:30 a.m.	Information Integrity: Sumit Nijhawan, Infogix
10:30 a.m. - 11:00 a.m.	Break
11:00 a.m. - 11:45 a.m.	Product Direction and Roadmap: Rachel Narel, Infogix
11:45 a.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:00 p.m.	Concurrent Breakout Session 1
2:00 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:30 p.m.	Concurrent Breakout Session 2
3:30 p.m. - 4:00 p.m.	Break
4:00 p.m. - 5:00 p.m.	Concurrent Breakout Session 3
6:30 p.m. - 9:30 p.m.	Networking Event

Wednesday, September 13, 2006

9:00 a.m. - 10:15 a.m.	Customer "Best Practices" Panel
10:15 a.m. - 10:45 a.m.	Break
10:45 a.m. - 11:45 p.m.	Solution Strategy for Information Controls: Ramon Nayar, Infogix
11:45 a.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:00 p.m.	Concurrent Breakout Session 4
2:00 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:30 p.m.	Concurrent Breakout Session 5
3:30 p.m. - 4:00 p.m.	Break
4:00 p.m. - 5:00 p.m.	Concurrent Breakout Session 6
6:00 p.m. - 10:00 p.m.	EII Award Banquet

Thursday, September 14, 2006

9:00 a.m. - 10:00 a.m.	Industry and General Tracks
10:00 a.m. - 10:30 a.m.	Break
10:30 a.m. - 11:30 a.m.	Industry and General Tracks
11:30 a.m. - 12:00 p.m.	Conference Closing

⭐ BREAKOUT TRACK 1 – BEST PRACTICES AND AUTOMATED CONTROLS

Organizations use automated controls in more parts of their business than ever. To support these efforts, companies are sharing controls best practices internally, sharing business justifications, and working to create centralized functions. This includes sharing the knowledge needed to build and maintain automated controls, perform risk assessments to identify control gaps, and develop best practices to build a central controls team. Presentations in this track will cover best practices in automated controls – including what has worked, as well as new approaches.

Auditor Perspectives on Infogix Balancing Rules
Roundtable Discussion

Tuesday, 1:00 p.m. - 2:00 p.m.

New laws such as SOX have led to greater scrutiny of automated controls by auditors. Join this roundtable discussion, facilitated by an IT Manager and a Financial Analyst, to discuss their experiences with auditors – and to share your own. Discussion topics will include: Auditor perspectives on Infogix balancing and control report format and content. Auditor requirements around standards for Infogix rule development, change control, and return codes. And, the cost savings when auditors review automated – instead of manual – controls.

• Sheryl Drexelius, Accounting Process Expert, Operational Disbursements, Finance, Wellpoint
• Sylvia Cange, Manager, Data Integrity Group, Conseco

Data Warehouse and Automated Information Controls Panel
Roundtable Discussion

Tuesday, 4:00 p.m. - 5:00 p.m.

This moderated roundtable discussion will begin with a set of questions to get the dialogue going, followed by a Q&A session on topics including:

• The increasing importance of trusted data warehouse information for compliance and audit.
• Automated information controls around the ETL process.

Roundtable discussion moderated by Mark Priebe, Solutions Consultant, Infogix, and featuring:

• James P. Gillum, ETL Team Manager, Citizens Financial Group
• Sheila Jeffrey, Vice President, Technical Data Architect, Wachovia

Enterprise Wide Controls, Audit, and Compliance, for Corporate Accounting and Finance
Ted Phillips, VP Corporate Finance and Accounting, Citizens Financial Group

Wednesday, 2:30 p.m. - 3:30 p.m.

Get a Corporate Accounting and Finance view of the value that using a financial information control structure provides. During this session, you'll find out about the benefits of using a standard, independent automated controls methodology to meet audit and compliance requirements. Implementing a standard tool to automate controls across your enterprise systems. And, the driving forces that make this a critical long-term business decision that both internal mandates and regulations such as Basel II and SOX require.

Best Practices and Automated Controls at American Express
Panel Discussion

Tuesday, 2:30 p.m. - 3:30 p.m.

Panel discussion on Best Practices and Automated Controls at American Express, featuring:

• Debra Kaczmarowski, Lead Business Systems Analyst – Global Corporate Technologies, American Express
• Michelle Gillespie, Project Manager – Global Corporate Technologies, American Express
• Joe Sworan, Project Manager – Global Corporate Technologies, American Express

Identifying Opportunities for Standard Controls
Donna Collins, Manager, Data Integrity, TSYS

Wednesday, 1:00 p.m. - 2:00 p.m.

This customer-led session will focus on how to identify repeatable control areas by targeting specific functional areas and how to identify the target audience for control output. You'll learn best practices that TSYS established to develop a centralized team and support standalone teams for standard controls across their worldwide client base. You'll also learn the business justifications used to enable this process.

Gleaning Metadata
Sheila Jeffrey, Vice President, Technical Data Architect, Wachovia

Wednesday, 4:00 p.m. - 5:00 p.m.

This session will use current Wachovia initiatives to show how you can reuse the analysis work and underlying metadata that are needed to establish and populate data management and control functions. You'll also see how you can use integrated metadata to document the data management and controls landscape. How you can use a centralized, federated, metadata repository to export utility definitions and parameters. And how you can expose and use the resulting knowledge for future projects, compliance, and audit documentation.

BREAKOUT TRACK 2 – STANDARDS AND CONTROLS

Today, your company faces many industry standards. From general standards (such as COSO and COBIT), to industry specific standards (such as ACORD and SWIFT) you must continuously deal with how to adopt and conform to a variety of standards across your enterprise. Presentations in this track will look at different standards – and how controls affect, simplify, or drive standards adoption and compliance.

Implementing IT Governance Using COBIT, ITIL, ISO/IEC 17799, and Six Sigma
Peter Davis, Peter Davis+Associates

Tuesday, 2:30 p.m. - 3:30 p.m.
Tuesday, 4:00 p.m. - 5:00 p.m.

IT governance is an area of focus; however, you face seemingly conflicting advice and regulation. While you may want to adhere to a single framework or methodology, existing frameworks and methodologies have different characteristics that may make it advantageous for you to use them together. Although standards have different audiences, scopes, and structures, they are not antithetical. This session maps how you can accommodate different frameworks and methodologies – such as COBIT, ITIL, and ISO17799 – to effectively manage business processes and information systems.

Extending the Reach of Six Sigma with Automated Controls
Joe Dupree, Infogix

Wednesday, 2:30 p.m. - 3:30 p.m.

While every company adapts and applies Six Sigma differently, the goal is the same – to empower employees to make information driven decisions. To be effective, those decisions require timely and accurate information. That's why automating your information controls is just as important as running efficient processes. Because even in the most quality-driven Six Sigma process, if the information is wrong, the process has no value.

SWIFT Standards and Controls
Robert Widmark, Regional Manager, SWIFT

Wednesday, 1:00 p.m. - 2:00 p.m.

In this session, you will lean about SWIFT and its mission. You will also hear about changes in the financial world that new regulations such as SEPA, Giovannini, and MiFID create. Gain an understanding of the increased need for control due to automation of processes and translation between different protocols/standards. And, learn about the global payment climate, SWIFT's insight in global banking controls maturity, and contradictions with regards to risk and control.

> "The customer's view of the Infogix solutions is extremely informative, and allows the sharing and exchange of best practice ideas across industries. Excellent!"

✓ BREAKOUT TRACK 3 – PRODUCT PARTICULARS

For the technical user, this track has it all. Explore product details – and our latest technologies – with Infogix Product Development Group team members. Presentations in this track will discuss current and future Infogix product directions, new product capabilities, and ways that you can optimize your current controls implementations.

ControlsAssure™ Control Modules Overview

Nick Ranieri, Infogix

Tuesday, 1:00 p.m. - 2:00 p.m.

Find out about the innovative platform that Infogix is using to build and deploy our next generation of control solutions! This session will provide an in-depth discussion of four Controls**Assure** Control Modules – Summary Balancing, Duplicate Source, Time and Sequence, and Item Matching.

Enhancing ACR® Products

Vivian Saegesser, Infogix

Tuesday, 4:00 p.m. - 5:00 p.m.

Learn what new features and functionality **ACR**/Detail and **ACR**/Summary 3.4 have t Improved DB2 database extraction, expanded input source navigation, enhanced Ur security and an extensive Variable Cycle chapter makes release 3.4 easier to build c and more user friendly!

ControlsInsight™ Business Perspective

Chad Hughes, Infogix

Wednesday, 1:00 p.m. - 2:00 p.m.

Has management ever asked you to look up the status of the balancing controls that your company uses? Come see how Controls**Insight** can let all levels of management look into the results of controls – without knowing a thing about them. With Controls**Insight** they can do it themselves!

ControlsAssure Exception Management Solution

Rachael Narel, Infogix

Wednesday, 2:30 p.m. - 3:30 p.m.

Join us to learn about the newest Module in the Controls**Assure** platform! During this session, you'll learn how our new Controls**Assure** Exception Management Control Module can provide the routing, research, resolution, and reporting that you need for effective exception management.

New Product Development

Panel Discussion, Infogix

Wednesday, 4:00 p.m. - 5:00 p.m.

This panel discussion, moderated by Michael Mayer, Project Management Specialist, will feature Infogix lead developers and architects. During this discussion, you will gain expert insight into the technology and architecture of the latest Automated Information Control solutions from Infogix.

❗ BREAKOUT TRACK 4 – MITIGATING RISK

Companies apply all kinds of controls to mitigate or eliminate risk in their business processes. As part of these efforts, automated controls are taking a featured role in risk management – and in reducing the overall costs of risk initiatives. Presentations in this track will look at different operational processes, and how companies have implemented automated controls in those processes to mitigate risk and meet their goals.

Mitigating Risks in a Data Warehouse
James P. Gillum, ETL Team Manager, Citizens Financial Group
Tuesday, 1:00 p.m. - 2:00 p.m.

This customer-led session will discuss the value that automated controls can provide in ETL Hub process development. You'll find out how to use a Standard Methodology for Independent Automated Controls throughout your ETL data processes. You'll also learn how a Standard Methodology can provide value to internal process, application, and data owners. Enable visibility across all system data owners and platforms. Provide significant value to ETL process development owners, as well as all source system, business, and application data owners. And, ensure that the ETL Hub process meets the required control checks – before it provides or loads data to the target destination, data repositories, RDR, or other data mart information owners.

Mitigating Information Risk Across the Enterprise
Jim Jones, Perennius Ensemble
Wednesday, 1:00 p.m. - 2:00 p.m.

Learn organizational strategies for mitigating information risk with real time, batch, and end-to-end automated information controls.

Enterprise Wide Patriot Act Controls
Bill Scull, VP IT Loss Management and AML, Wachovia
Tuesday, 2:30 p.m. - 3:30 p.m.
Wednesday, 2:30 p.m. - 3:30 p.m.

This customer-led session will discuss how you can use automated controls to validate the accuracy of new account information – from the time of input on a host application, until its final destination in a database. You'll also learn how this type of automation can help you comply with regulations such as the Patriot Act.

"Great information I can take back to my company."

INDUSTRY AND GENERAL TRACKS

In addition to the preceding Breakout Session tracks, our 2006 Conference also gives you a choice of four innovative Industry tracks! These in-depth sessions will dive into the details of key industry issues. And provide ideas and solutions that you can put to use right away.

Insurance and Healthcare Track

Automating Manual Controls and Processes
Jennifer H. Strayer, Senior Programmer Analyst, WellPoint, Inc.
Thursday, 9:00 a.m. - 10:00 a.m.

This session will discuss the success of a balancing project at WellPoint. You'll learn about the life of the project – beginning with its origination. The research needed to automate each balancing step. And how Infogix controls helped automate a tedious monthly balancing task to meet an audit requirement. This session will also explain how much time this project saved. And how three production files can now balance data for more than 1,200 providers.

Insurance Trends and Automated Information Controls
Andy Whalen, Customer Unit Leader, Insurance and Healthcare, Infogix
Thursday, 10:30 a.m. - 11:30 a.m.

Insurance carriers have long realized the value of providing risk analysis for their customers. During this session, you will learn how forward thinking carriers have taken this finely tuned risk management skill set and turned it inward toward their own processes and information supply chains to reduce costs, while increasing efficiencies and customer satisfaction.

Financial Services Track

Importance of Standardizing on XML Standards
Roundtable Discussion
Thursday, 9:00 a.m. - 10:00 a.m.

During this session, you will learn about the importance of standardizing on XML, and how this can ease the deployment of automated controls. You'll also learn about efficiencies that SWIFT has realized, and practical examples that banks can realize, by using and adopting XML Standards such as Straight Through Processing-STP.

Roundtable discussion moderated by Dan Dopp, Managing Director, International Operations, Infogix, and featuring:

• Jim Jones, Perennius Ensemble
• Robert Widmark, Regional Manager, SWIFT

Customer Success Story: Infogix Automated Controls and Services Implementation
Stephanie Brockway, Webster Bank
Thursday, 10:30 a.m. - 11:30 a.m.

During this session, you will hear a customer success story that shows the value of implementing enterprise wide controls. Learn about Webster Bank's success with conversions, the process of incubating controls into applications, how they benefited from Infogix services, and obtained management support.

Telecommunications Track

FAB
Tracy Miller, Customer Unit Leader, Telecommunications, Infogix
Thursday, 10:30 a.m. - 11:30 a.m.

Abstract coming soon.

Product Particulars

ControlsAssure™ Control Modules Overview
Nick Ranieri, Infogix
Thursday, 9:00 a.m. - 10:00 a.m.

Find out about the innovative platform that Infogix is using to build and deploy our next generation of control solutions! This session will provide an in-depth discussion of four Controls**Assure** Control Modules – Summary Balancing, Duplicate Source, Time and Sequence, and Item Matching.

Welcome Reception

This is your first chance to meet other Conference attendees in a relaxed and informal setting. After you check in, please join us on the ninth floor Pool Deck to pick up your Conference registration materials, and to enjoy complimentary cocktails and hors d'oeuvres – and lots of fun!

Interactive Product Showcase

Visit an exciting new Product Showcase to get up to speed on the latest Infogix products and solutions. The Showcase will be open throughout the Conference, so please stop by to see:

➡ What's new in the latest releases of **ACR/**Detail®, **ACR/**Summary®, Controls**Assure**™, and more.

➡ On-site Product experts.

➡ A brand new exception management solution from Infogix!

Best Practice Panels

Learn "best practices" from industry experts – and your peers. Enjoy information packed panel discussions to learn how you can:

➡ Deploy automated controls at the enterprise level.

➡ Get management "buy in" for controls.

➡ Create a "Center of Excellence."

"It seems to get better every year. Always fun and informative."

infogix
Annual Conference

Register Now to Attend the 2006 Infogix Annual Conference

Our 2006 Annual Conference is the "don't miss" event of the year for Infogix customers! Join us in Chicago to focus on the control automation challenges that affect you most. And to network with Infogix customers who have hundreds of years of combined experience facing the same issues as you.

Your paid registration provides full access to this innovative two-and-a-half day event – including information packed breakout tracks and a new product showcase. All Conference ticket holders will also enjoy complimentary breakfast, lunch, and light refreshments throughout this event.

Registration Cost

Tickets to attend this Conference cost $795 each. However, as a valued Infogix customer, you can attend this event for free!

Cancellations and Substitutions Policy

All cancellations and substitutions must be in writing. Substitutions can be made at any time for no charge. Please send cancellations and substitutions to conference@infogix.com or fax +1.630.505.1812.

Don't Delay – Register to Attend Today

This event allows you to explore all of the latest Infogix solutions. Take advantage of expert- and user-led breakout sessions. And learn the long-term strategies and approaches that you'll need to automate information controls across your enterprise.

To secure your spot at this event, visit **www.infogix.com/conference** today. We look forward to seeing you in Chicago!

Hotel Information

This event will take place at the Chicago Marriott Downtown Magnificent Mile in Chicago, Illinois. Soaring 46 stories into the downtown Chicago skyline amid the world-famous shops and restaurants on Michigan Avenue, the Chicago Marriott Downtown Magnificent Mile puts you in the middle of it all. It's also just minutes away from Navy Pier, world-class attractions such as The Art Institute of Chicago, the Shedd Aquarium, the Field Museum, and the shores of Lake Michigan.

A limited number of rooms are reserved for attendees at the Chicago Marriott Downtown Magnificent Mile. Mention that you are attending the Infogix Annual Conference to receive the discounted group rate of $229 per night, plus taxes, single or double occupancy. **To receive this group rate, you must make your room reservation by August 9, 2006.**

The hotel will accept reservation requests received after 5:00 p.m. on this date on a space and rate availability basis, so please make your hotel reservations as soon as possible. To reserve your room, please contact:

Chicago Marriott Downtown Magnificent Mile
540 North Michigan Avenue
Chicago, Illinois 60611 USA
1-800-228-9290