

Session	Title	Description	M4	M3	Housing	Conference	ResLife	Process Building
Monday, October 12, 1130am	Welcome and State of the Union	All clients are invited to attend this session. Be introduced to new functionality in Mercury 4, from small changes (help icons on Dynamic Lists), to big new functions (scheduled reports and operations! APIs! Shibboleth!), to an entirely new Mercury Product (Mercury Conference). Learn about our development roadmap and what is coming in future versions of Mercury!	✓	✓	✓	✓	✓	✓
Monday, October 12, 130pm	New User Orientation	This session is designed to orient those of you who are new to Mercury to your available resources. The focus is on those team members who are primarily responsible for managing Mercury at your site, but we welcome anyone new who wants to meet RMS Staff and the User Exec Board, learn about training resources, or get some advice on which sessions are a fit for your role.	✓	✓	✓	✓		
Tuesday, October 13, 1130am	Set it and Forget it: Scheduled Tasks in Mercury	Clients have been asking for scheduled reports for a while, but we realized the next frontier would be scheduled operations, so we are delivering both in Mercury 4! This session is an overview of the new scheduling functionality and where it can be used in Mercury 4. Whether you want to schedule Fee Assessment to run daily or to send your roster to Public Safety every Friday at 5pm, this is the session for you!	✓		✓	✓	✓	✓
Tuesday, October 13, 130pm	I wish I had a place to put this info: Custom Entities are your new best friend	Remember when it was exciting to create a custom field to collect and track information about your residents? Take that feeling and multiple it by new Dynamic Lists, Operations, Easy Templates and more! This session will walk you through some examples of how you and other clients can use Custom Entities to pull even more information into Mercury, simplifying your work and maximizing your ability to report on related items.	✓		✓	✓		✓
Wednesday, October 14, 1130am	From 18 templates down to 3: Conditional Template Functionality	Over the years it's easy to accumulate dozens or hundreds of templates to accomplish a full year's cycle of business Processes. It's time to go on a template diet and learn how you can combine similar templates and eliminate long template cascades using new conditional template features. Hear from clients who simplified their template flows in Mercury 4!	✓		✓	✓		✓
Wednesday, October 14, 130pm	Visualizing Assignments - Why look at a list when you can look at a Calendar?	While we love the Flexibility of Dynamic Lists, we know that sometimes a visual method for reviewing and working with bookings is what you need. Our new Calendars for Bed Space Bookings and for Conferences allow you to look at your bookings in a whole new way!	✓		✓	✓		✓
Thursday, October 15, 9am	International Client Session	This session is directed at all of our international clients. We'll be discussing our development roadmap and new features, and answering your questions. This session is being hosted in lieu of our usual trip to the UK in November. We recommend all international clients participate in RMS World, but if you cannot, please attend this session.						
Thursday, October 15, 1130am	Integration Strategies - Interfaces, API's, and more	Mercury 4 opens up new opportunities for integrations across systems. When was the last time you reviewed your interfaces to determine if they're meeting your needs? In this session you'll learn about the new API feature and refreshed look of Interfaces in Mercury 4, as well as review existing integration options such as our pre-populate template data feature. Learn how clients are using these new features to improve communication with other offices, and leave energized to make improvements at your site. This session has a technical focus, but any attendee may leave with some new ideas for integrations you need.	✓		✓	✓		
Thursday, October 15, 130pm	Roundtable: Short Term and Long Term Effects of COVID-19 on Business Processes	It's safe to say that we are all experiencing change this year, and it is very likely that there will be long-term impacts of COVID-19 on business practices for years to come. Join the conversation about how your peers at other institutions are preparing for the coming year(s). Come prepared to listen and to share examples of the discussions and plans at your institution.	✓	✓	✓	✓	✓	
Thursday, October 15, 130pm	Roundtable: Gender Inclusive Housing	Come discuss best practices for managing gender-inclusive processes at your site. Learn how your peers are managing expectations and expanding options in this ever-evolving arena.	✓	✓	✓	✓	✓	✓
Thursday, October 15, 130pm	Roundtable: Inspections - Yay or Nay?	For some clients, Inspections are an essential business practice, seen as necessary to replace funds spent on facility upkeep. Other clients have dropped the practice, seeing it as a time-sink that costs more than it brings in. Join this discussion with clients on both sides of the aisle to learn more about the role inspections can play at your site.	✓	✓	✓		✓	✓

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Thursday, October 15, 130pm	Roundtable: InstaGrids in Real Life	Not sure how you can use InstaGrids? Join this round table to see some real examples of client-built InstaGrids and get ideas for how you can improve your processes using the new InstaGrid functions.	✓	✓	✓	✓		✓
Friday, October 16, 1130am	InstaGrids - They're not just queries, anymore	Mercury 4 includes numerous new uses for InstaGrids. In addition to being super flexible reports, your InstaGrid results view can now include links to run templates, operations (other InstaGrids!), reports, and dynamic lists. InstaGrids are the new Dynamic List, and you can make them do just about anything. Ever wish your Bed Space Booking list had more application fields on it? Or that you could drop a token in an email only to realize the data you need isn't available? InstaGrids are your new best friend.	✓		✓	✓		✓
Friday, October 16, 130pm	That thing you spent all summer preparing: Moving Time Slots	If you had asked us a year ago what the most common thing we'd have to help people with in 2020 would be, let's just say this wouldn't have been at the top of the list. But as the world has changed around us, we listened to your needs and built out our newest function, Moving Time Slots. Learn how you can allow your residents to sign up for move-in and move-out times with limits on the Community, Building, Floor, and even Suite and Room levels.	✓		✓			✓
Monday, October 19, 1130am	Can I just upload this spreadsheet? YES!	We were excited about Mercury 3's Batch Update feature, but anyone who has worked in our field knows how useful it would be to be able to batch upload data from a spreadsheet. The "Load and Apply Excel" Operation does just that. Select your file, indicate a unique identifier, and map your columns from Excel to fields in Mercury. Are you excited yet? Load and Apply Excel can be used to update existing records and to add new records. The possibilities are nearly endless!	✓		✓	✓	✓	✓
Monday, October 19, 130pm	Template Design - it's not just for Student-Facing processes	It's easy to spend hours crafting the perfect template process for your residents or attendees, but what about for your staff? Learn how to make simple adjustments to the Mercury Base templates to help your team with instructions and to save your team time by removing clicks and automating actions.	✓	✓	✓	✓	✓	✓
Tuesday, October 20, 1130am	Mercury Conference Overview	Learn about the full cycle of functions available in Mercury Conference, from taking Requests and sending quotes, to confirming a conference, making reservations, and booking rooms, dining, facilities, equipment, and more! This session is geared at clients who want to learn more about all of Mercury Conference, in particular if your conference team manages conferences from start to finish.	✓		✓	✓		
Tuesday, October 20, 130pm	Taking Your Template Design to the Next Level: Simplifying and Beautifying your Application Process	During this session we'll discuss how Northwestern University went from managing many nearly identical application templates with too much information to using a few simple templates to create blank applications with the correct application period and one simplified template to collect application information. The new templates used reduced wording and graphic icons for a more modern and streamlined user experience.	✓	✓	✓	✓		✓
Wednesday, October 21, 1130am	It's all about the Base: Filters and InstaGrids and New Menus, Oh my!	The Mercury Base navigation is ever-evolving. In this session we will review the new items that are available for you to download and use, as well as show off the new Menu Management feature that helps to keep everything organized. Whether you've kept the base set-up from your original upgrade or customized out the wazoo, this session is for you!	✓		✓	✓		✓
Wednesday, October 21, 130pm	Making Dynamic Lists Work for You	Dynamic Lists are more than just search results - they're interactive reports that act as the starting point for limitless business processes. Did you know you can "jump" from one list to another? This session explores the different list types and their relationship to each other, how you can customize your lists for different needs, and the new Mercury 4 feature that allows you to build Easy Filters for your Dynamic Lists.	✓	✓	✓	✓	✓	✓
Thursday, October 22, 1130am	The Future of Housing and Event Management	It may be hard to remember a time before Emotional Support Animals and Gender Inclusive Housing were everyday terms, but they're only a few years old. In this session, we want to hear your thoughts on what the "Next Big Things" are going to be. What new processes will you need to manage? What is fading into the past? Come with your ideas - we're listening!	✓	✓	✓	✓	✓	✓
Thursday, October 22, 130pm	Using DocuSign with Mercury	While Mercury has a robust contract feature, we know that some clients have a need to integrate directly with DocuSign. In this session, learn about the University of Alabama's experience blazing a trail with this new feature, and leave with the information on how you can pursue a DocuSign integration.	✓		✓	✓		

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Friday, October 23, 1130am	<b>Clear Communication Strategies for Your Entire Team</b>	Step up your communications to your residents with personalized communications. In this session, learn about pre-configuring email messages for use in multiple processes, how to use "Copy Settings From" to save time and keep messaging consistent, why Email Senders can help your whole team stay in touch with their residents, and how the Position function keeps the each team member focused on their residents.	✓	✓	✓	✓		✓
Friday, October 23, 130pm	<b>Let's Start at the Beginning... How to Approach Designing and Documenting a Process</b>	It's one thing to know how to build a template, but it's a whole other thing to understand how to build a process. This session covers how to plan out a process, from drawing it in crayon on a napkin to building it out, to testing and documenting (but not necessarily in that order!). Learn strategies for planning your template flow and Menu navigation and for maintaining your documentation as your process evolves, plus, as a bonus, learn some methods for building your documentation right into Mercury. New and seasoned users are sure to leave this session with a better path for constructing your own business solution. Future You will appreciate the effort!	✓	✓	✓	✓	✓	✓