



Event Brochure

FORUM 2026

Education | Collaboration | Community
September 27-29 | Orlando, FL





Contents

Overview	3
Steering Committee	5
Schedule-at-a-glance	6
Registration	8
Accommodations	9
Keynote speaker	10
Networking events	11
Technology Showcase	13
Advantage Experience	14
Ask the Experts	15
Educational sessions by primary content area	16
Educational sessions details and descriptions	20
Build your schedule	48
Attendees from Forum 2025	49
Earning CPE credits at Forum 2026	50

Overview

CGI Forum is our premier annual event, bringing together CGI Advantage professionals from across the country to learn, connect, and grow. Through engaging sessions, meaningful networking, and shared experiences, Forum is built around three core pillars:

Education



Expand your knowledge through a wide range of sessions and one-on-one access to subject matter experts, helping you maximize the value of CGI Advantage.

Collaboration

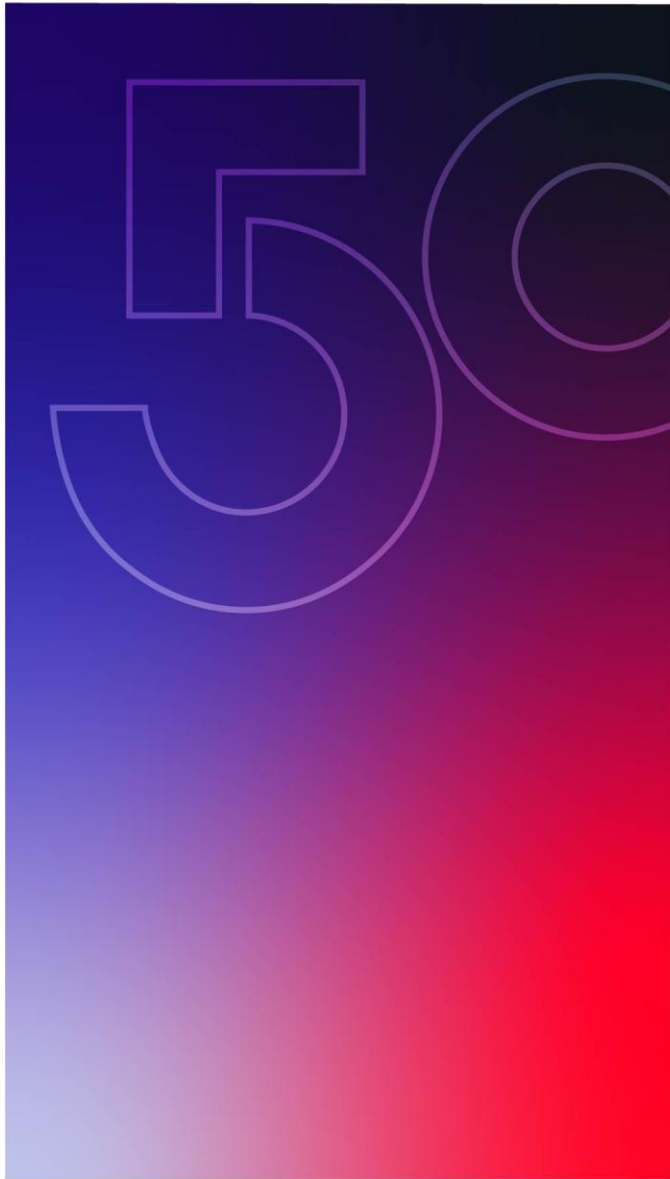


Connect with fellow users and CGI experts to exchange insights, explore innovative solutions, and learn from real-world experiences.

Community



Strengthen your network and build lasting relationships with fellow CGI Advantage users, fostering a connected community that supports shared growth and success.



A word from our Steering Committee Chair

“

As we work in Advantage each day, we all find ourselves thinking, ‘I wish Advantage could...’ The Forum is a great place to learn more about the product, including things you may not know and what’s coming next. The opportunity to interact with fellow users and CGI product teams is invaluable to you and your agency. And besides, it’s always a lot of fun!



Ed Quedens
City of Mesa, AZ
Steering Committee Chair

Meet the 2026 Steering Committee

Members of the CGI Advantage Steering Committee play a vital role in representing the user community and shaping the future of CGI Advantage.

Application/Administration Technical



Anna Haydon
Commonwealth of
Kentucky
2027



Ruth Schwartz
State of Michigan
2028

Budget



Paul Fagin
Harris County, TX
2026



Fei Person
Maricopa County, AZ
2028

Business Intelligence



Ed Quedens
City of Mesa, AZ
2026



Jacqueline Todd
State of Arizona
2027

Financial Management



Kimberly Allen
Olmsted County, MN
2026



Lisa Comer
State of West Virginia
2027



Kyle Schlenker
State of Colorado
2028

Human Resource Management



Alicia Mountjoy
State of Nevada
2026



Stephanie Burnham
State of Utah
2027



Yumeka Seabrooks
Los Angeles County
Office of Education
2028

Schedule-at-a-glance

Sunday, September 27

Registration	12:00 p.m.	8:00 p.m.
Ask the Experts	1:00 p.m.	3:00 p.m.
Showcase Reception	4:00 p.m.	6:00 p.m.
Welcome Reception	6:00 p.m.	8:00 p.m.



Monday, September 28

Registration	7:00 a.m.	5:30 p.m.
Breakfast	7:00 a.m.	8:00 a.m.
General session	8:00 a.m.	9:15 a.m.
Technology Showcase	9:15 a.m.	12:00 p.m.
Breakout session block 1	9:30 a.m.	10:30 a.m.
Networking break	10:30 a.m.	11:00 a.m.
Breakout session block 2	11:00 a.m.	12:00 p.m.
Users' Group Luncheon	12:15 p.m.	1:30 p.m.
Technology Showcase	1:30 p.m.	4:30 p.m.
Breakout session block 3	1:45 p.m.	2:45 p.m.
Networking break	2:45 p.m.	3:15 p.m.
Breakout session block 4	3:15 p.m.	4:15 p.m.
General session	4:30 p.m.	5:30 p.m.
Offsite Special Event	6:30 p.m.	11:00 p.m.

Schedule-at-a-glance (cont.)

Tuesday, September 29		
Registration	7:00 a.m.	6:00 p.m.
Breakfast	7:00 a.m.	8:00 a.m.
General session	8:00 a.m.	9:15 a.m.
Technology Showcase	9:15 a.m.	12:00 p.m.
Breakout session block 5	9:30 a.m.	10:30 a.m.
Networking break	10:30 a.m.	11:00 a.m.
Breakout session block 6	11:00 a.m.	12:00 p.m.
Networking Luncheon	12:15 p.m.	1:15 p.m.
Technology Showcase	1:15 p.m.	4:15 p.m.
Breakout session block 7	1:30 p.m.	2:30 p.m.
Breakout session block 8	2:45 p.m.	3:45 p.m.
Networking break	3:45 p.m.	4:15 p.m.
Breakout session block 9	4:15 p.m.	5:15 p.m.
Closing general session	5:30 p.m.	6:00 p.m.
CGI hosted regional dinners (optional)		



Registration

Client early bird rate **\$1,395 USD**
(if registered by Friday, July 31)

Client regular rate **\$1,595 USD**
(if registered after Friday, July 31)

CGI partner rate **\$1,595 USD**
(must register by Friday, July 31)

Optional registration add-ons

Special event guest pass **\$150 USD**

Allows attendance to the Special Event at Margaritaville and The Wizarding World of Harry Potter™ – Diagon Alley™. Guests must be 21 or older and are not permitted at any other Forum functions or meals. Maximum of one (1) guest per client attendee.

Contracted passes

Each maintenance-paying CGI Advantage client site is eligible to receive complimentary registration(s) per their CGI Advantage contract. Redemption details have been sent to your organization's primary contact.

For registration and payment inquiries, please contact Michelle Rives, Registration Manager at michelle.rives@cgi.com or call 804-384-7243.





Accommodations

CGI Forum 2026 will take place at Loews Sapphire Falls, located within the Universal Orlando complex. Loews Sapphire Falls is a chic, tropical island-themed hotel with [exclusive theme park benefits](#) at Universal Orlando Resort.

A block of rooms will be available at Loews Sapphire Falls for Forum attendees.

Two ways to make a reservation:

- 1) Call 1-866-360-7395 and refer to CGI Forum 2026
- 2) Visit the [CGI Forum reservation website](#)

Once your room reservation confirmation is received, a deposit of one night's room and tax will be charged to the credit card on your reservation.

Check-in: 4:00 p.m. Check-out: 11:00 a.m.

Nightly room rate: \$259.00 + tax*

Reservation deadline: Friday, September 4

**Once the room block is full or the hotel reservation cut-off date has passed, rooms will be reserved on a space-available basis and may be subject to increased rates.*

Cancellations must be made at least 48 hours before arrival or the one-night deposit will be forfeited.

Tuesday, September 29 | 8:00 a.m. – 9:15 a.m.

General Session Keynote: Chris Barton

Bringing impossible ideas to life

Innovation doesn't begin with knowing what's possible—it begins with imagining what could be.

Technology and AI are rapidly reshaping what's possible—and creating new opportunities to rethink how we work, solve problems, and serve our communities. But meaningful innovation often starts with an idea that doesn't yet seem possible. Chris created Shazam after “experts” told him his idea was outlandish and couldn't be done. The vision was years ahead of its time—eight years before the introduction of iPhone apps.

In this inspiring and entertaining keynote, Chris shares the incredible story behind Shazam and challenges audiences to think differently about what's possible. Through jaw-dropping stories and a practical framework for innovation, attendees will learn how to:

- Look beyond what's familiar and imagine new possibilities
- Embrace emerging technology and AI as catalysts for innovation
- Apply a practical framework for turning bold ideas into meaningful change

Ready to think bigger? Join us at CGI Forum and discover what can happen when we stop asking, “*Is this possible?*” and start asking, “*How can we make it possible?*”



Networking events



Showcase Reception

Sunday | 4:00 p.m. – 6:00 p.m.

Don't miss the opportunity to chat with showcase partner vendors and CGI product experts. Get started on learning more about CGI Advantage and partner products and find the answers you've been looking for in this relaxed kick-off to CGI Forum 2026.



Welcome Reception

Sunday | 6:00 p.m. – 8:00 p.m.

Join us at our Welcome Reception for an evening full of food, drinks, activities, and conversation! It's the perfect opportunity to reconnect and get acquainted with fellow Advantage peers while kicking off the conference.



CGI Advantage Users' Group Luncheon

Monday | 12:15 p.m. – 1:30 p.m.

Enjoy Monday's lunch while networking with your fellow user community members and listen to remarks and important updates delivered by your Users' Group Steering Committee.

Networking events



Special Event at Universal

Monday | 6:30 p.m. – 11:00 p.m.

Enjoy dinner, drinks, live music, and laid-back island vibes at Margaritaville before we head to a private event at The Wizarding World of Harry Potter™ – Diagon Alley™ with exclusive after-hours access to explore the shops and establishments of Diagon Alley™.



Networking Luncheon

Tuesday | 12:15 p.m. – 1:15 p.m.

Take a break, enjoy lunch, and connect with fellow attendees. This buffet-style networking lunch offers open seating so you can gather with colleagues, reconnect with friends, or make new connections. Optional table topics featuring CGI Advantage modules will also be available for those looking to exchange ideas and best practices.



CGI hosted regional dinners *(optional)*

Tuesday | various times

At the conclusion of Forum, CGI teams will host client dinners at restaurants throughout the Orlando area, providing an opportunity to continue conversations and connect in a more informal setting. Additional details and invitations will be shared closer to the event.

Technology Showcase

The Technology Showcase is your destination to explore CGI Advantage, connect with subject matter experts, and gain practical insights through one-on-one conversations tailored to your needs.

The Showcase also features CGI's valued partners, leading solution providers who extend and enhance the CGI Advantage ecosystem. Learn how these partnerships strengthen our solution and how your organization can maximize the value of CGI Advantage.

This year's Technology Showcase will include:

- CGI Advantage EngageHub
- CGI Advantage Financial Management
- CGI Advantage Human Resource Management
- CGI Advantage Insight
- CGI Advantage Performance Budgeting
- CGI Advantage Procurement
- CGI Advantage Support Services
- CGI Advantage Technology and Innovation



CGI Advantage Experience

The Technology Showcase also features the CGI Advantage Experience, an interactive space to connect, engage, and explore.



Learning Lab

Visit the Advantage Learning Lab for hands-on, self-guided access to CGI Advantage 4 and its key features.



Collaboration Station

Stop by the Collaboration Station, hosted by the Steering Committee, to see what attendees are saying and share your favorite thing about CGI Advantage on the community wall.



Client Testimonial

Don't miss the Client Testimonial Station, your chance to share your experience working with CGI.



Ask the Experts

Start your CGI Forum experience with direct access to CGI's experts in an exclusive, interactive setting. During our Ask the Experts session, clients can schedule dedicated one-on-one meetings to discuss their most pressing questions, challenges, and ideas.

Whether you're looking for guidance on a specific "how do I...?" scenario, exploring new approaches, or seeking expert feedback, these sessions are designed to provide practical, actionable insights tailored to you.

Format: 25-minute one-on-one sessions with CGI subject matter experts

Availability: Limited spots during a 2-hour session block

Timing: Sunday, September 27 | 1:00–3:00 PM

Cost: Complimentary

Registration: Opens closer to the event

Don't miss this opportunity to engage directly with our experts and set the stage for a productive Forum experience.

Educational sessions

By primary content area





Budget

- 114 Performance Budgeting: Celebrating Progress, Showcasing Innovation, Shaping the Future
- 124 Workflow in Action: New Tools for Budget Routing in Performance Budgeting
- 133 Designer Reimagined: Smarter Guidance, Validation, and Formulas for Budget Entry
- 144 Connecting SBFS and HCM Position Control for Better Budget Decisions
- 253 Outcome-Based Budgeting in Action: Measures, EngageHub, and Better Funding Decisions
- 264 Capture the Moment: Using Request Snapshotting to Track Budget Change
- 276 Surviving Budget Season: How West Virginia Automated 90% of Its Budget Book **FH3** LEAVE NOTHING TO CHANCE
- 284 Hidden Helpers in Budgeting: Limits, Documentation Tabs, and Modeling Choices
- 294 Design Analytics That Explain the Budget Story in Performance Budgeting

Business Intelligence

- 126 Modernizing Enterprise Reporting with CGI Advantage Insight
- 136 Deep Dive into CGI Advantage Insight Administration
- 254 Future-Proof: Build, Ask and Embrace Intelligence
- 274 Beyond BI: CGI Advantage Insight as the Enterprise Data Platform

Financial

- 111 Budget Control Has Grown Up
- 121 Grantor Action Figures
- 141 Cost Allocation: What Is It Good For?
- 251 Performance Measurement with CGI Advantage Financial Management
- 261 Tax Year 2026 Updates: IRS Enhancements and the Move to IRIS
- 271 Invoicing: Let Me Count the Ways
- 281 ACFR Panel Discussion
- 291 Real Talk: Stories of New Feature Implementations

General Interest

- 135 From Access to Adoption: Staying Engaged in the new Client Collaboration Center
- 146 From ERP to Enterprise Intelligence: The Future of Government Data 
- 256 Agentic AI in CGI Advantage: From Assistance to Autonomous Action
- 266 CGI EngageHub in Action: Real Solutions from Real Clients
- 286 Prompting for Results: Unlocking Generative AI in Advantage
- 296 Client-Led Support: Building Effective Tier 1 Help Desks and Vendor Support

HR/Payroll

- 113 CGI Advantage HRM Product Direction: Shaping the Future of HR
- 123 Time Tracking and Leave Updates: Tools for Smarter, Compliant Work
- 132 Extending Advantage: Configurable Validations and Formulas
- 143 Predict, Preview, Pay: Payroll Tools in Action
- 252 Benefits Management Reimagined: New Features and Future Innovation
- 263 Performance Journey: Building a High-Performing Workforce
- 273 Position Management: From Budget Authorization to Workforce Visibility
- 283 HR and Payroll Panel: Insights, Ideas, and Open Discussion
- 293 Everyday Efficiencies: Tips, Tools and Troubleshooting





Procurement

- 112 Exciting Changes You Need to Know in Procurement, Grants, and Inventory
- 122 Now that the Purchase is Done, What's Next? Exploring the Post Award Phase
- 131 Show Me the Money: Grantor Process from Advertising to Reimbursement
- 142 Getting on the Same Page with Unified VSS
- 262 Inventory in Action: Connecting Procurement and Inventory Management
- 272 Becoming a Procurement Superstar with CGI Advantage Procurement
- 282 Payments: Let Me Count the Ways
- 292 Modernizing Government Procurement: Client Perspectives and Practical Strategies

Technology & Architecture

- 115 CGI Advantage Platform Product Direction: Strategic Innovations and What's Next
- 125 Operating CGI Advantage in the Cloud: Lessons, Best Practices, and Real-World Insights
- 134 Extending CGI Advantage with CGI EngageHub: Platform Overview
- 145 Designing CGI Advantage for High Availability and Continuous Operations
- 255 Modern Security Strategy in CGI Advantage: Balancing Access and Risk
- 265 Evolving CGI Advantage Architecture with Control Plane and Event-Driven Design
- 275 Unlocking Real-Time Integration with CGI Advantage Connect
- 285 What's New in CGI Advantage: Key Capabilities Driving Impact
- 295 Ask the Experts: CGI Advantage Strategy and Technology Panel

Educational sessions

Details and descriptions



Monday September 28 | 9:30 a.m. – 10:30 a.m. ET

111 Budget Control Has Grown Up

Monday | 9:30 a.m. – 10:30 a.m.

Primary content area: Financial

Other content area: Budget

Since the launch of CGI Advantage 4, budget control capabilities have evolved significantly through client-driven enhancements, community innovation, and real-world implementation experience. This session highlights the most valuable new features, emerging best practices, and creative approaches being used across the CGI Advantage community. Whether your goal is stronger governance, greater operational flexibility, or new ways to maximize the value of your investment, you'll leave with practical ideas and capabilities you can put to work right away.

Learning objectives

After attending this session, you should be able to:

- Identify key budget control enhancements introduced in CGI Advantage 4 feature releases and understand their practical applications
- Evaluate opportunities to improve budget oversight, streamline processes, and increase efficiency using existing CGI Advantage capabilities
- Apply real-world ideas and best practices to strengthen your organization's budget management process.

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Finance

Program Level: Intermediate

Prerequisites: Requires knowledge of budget transaction processing and year-end budget activities

Advanced Preparation: None

Delivery Method: Group Live

112 Exciting Changes You Need to Know in Procurement, Grants, and Inventory

Monday | 9:30 a.m. – 10:30 a.m.

Primary content area: Procurement

Stay ahead of evolving demands in public sector operations. This session highlights key enhancements across procurement, grants, and inventory designed to improve efficiency, strengthen compliance, and increase visibility. Learn what's changing, why it matters, and how to position your organization to take full advantage.

Learning objectives

After attending this session, you should be able to:

- Describe key enhancements across procurement, grants, and inventory, including their impact on day-to-day operations and compliance requirements
- Apply practical strategies to adopt these changes effectively, enabling better decision-making and stronger accountability across your organization

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 9:30 a.m. – 10:30 a.m. ET

113 CGI Advantage HRM Product Direction: Shaping the Future of HR **Monday | 9:30 a.m. – 10:30 a.m.** **Primary content area:** HR/Payroll

Join us for an engaging look at the evolving HR landscape and what it means for public sector organizations today and in the years ahead. We will share outcomes from last year's client poll, highlight the enhancements and innovations recently delivered in CGI Advantage Human Resource Management (HRM), and preview the capabilities planned for the future. Discover how your feedback and industry trends are helping shape CGI Advantage HRM!

Learning objectives

After attending this session, you should be able to:

- Identify key industry trends in HR
- Discuss the direction for CGI Advantage HRM
- Describe the new features in CGI Advantage HRM

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

114 Performance Budgeting: Celebrating Progress, Showcasing Innovation, Shaping the Future **Monday | 9:30 a.m. – 10:30 a.m.** **Primary content area:** Budget

Join us for a look at the past, present, and future of CGI Advantage Performance Budgeting. We'll review recently delivered features, preview upcoming enhancements, and share roadmap priorities influenced by client feedback and strategic product direction. Whether you're a long-time user or exploring new possibilities, you'll gain insight into how the solution continues to evolve and how future capabilities can support your budgeting goals.

Learning objectives

After attending this session, you should be able to:

- Summarize recent Performance Budgeting enhancements that sites can use now
- Identify roadmap items to monitor for future planning and adoption

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 9:30 a.m. – 10:30 a.m. ET

115 CGI Advantage Platform Product Direction: Strategic Innovations and What's Next

Monday | 9:30 a.m. – 10:30 a.m.

Primary content area: Technology & Architecture

Secondary content area: Artificial Intelligence

Get a forward-looking view of CGI Advantage and the strategic investments shaping the platform. This session highlights key priorities, innovation themes, and what sites should expect in the coming year. Participate in live voting to help influence future capabilities and align your plans for what's ahead.

Learning objectives

After attending this session, you should be able to:

- Identify the key strategic themes shaping the CGI Advantage roadmap
- Evaluate how upcoming capabilities align to site priorities and initiatives
- Analyze how planned roadmap enhancements support long-term modernization goals

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 11:00 a.m. – 12:00 p.m. ET

121 Grantor Action Figures
Monday | 11:00 a.m. – 12:00 p.m.
Primary content area: Financial

Whether you serve as a direct grantor or a pass-through grantor, grant management involves far more than awarding funds. From announcing opportunities and evaluating applications to post-award processing and grantor reporting, many powerful CGI Advantage Financial Management capabilities remain underused. This session showcases newer grant management tools and practical approaches. You'll also hear from peers who have navigated their own grant management journeys and can share lessons learned and successes.

Learning objectives

After attending this session, you should be able to:

- Recognize opportunities to improve grant management processes using CGI Advantage Financial functionality
- Evaluate newer grant management tools and approaches that support more effective grant oversight and reporting
- Apply lessons learned and best practices shared by peers to strengthen your grant management outcomes

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Finance

Program Level: Intermediate

Prerequisites: Requires knowledge of grant management fundamentals and familiarity with solicitation and evaluation activities

Advanced Preparation: None

Delivery Method: Group Live

122 Now that the Purchase is Done, What's Next? Exploring the Post Award Phase
Monday | 11:00 a.m. – 12:00 p.m.
Primary content area: Procurement
Secondary content area: Artificial Intelligence

Strengthen post-award contract management by mastering the processes that protect value and ensure compliance. This session explores critical activities including matching, bid deposits, retainage, liquidated damages, warranties, insurance tracking, claims management, and vendor performance evaluation. Learn how to standardize these practices within CGI Advantage to improve oversight, mitigate risk, and drive accountability throughout the contract lifecycle.

Learning objectives

After attending this session, you should be able to:

- Identify how to effectively manage key activities to reduce risk and ensure contract integrity
- Recall how to track claims, monitor vendor performance, and manage financial safeguards to drive better outcomes and enforce accountability throughout the contract lifecycle

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires a basic understanding of CGI Advantage Procurement and processes at your site

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 11:00 a.m. – 12:00 p.m. ET

123 Time Tracking and Leave Updates: Tools for Smarter, Compliant Work

Monday | 11:00 a.m. – 12:00 p.m.

Primary content area: **HR/Payroll**

Stay up to date with the latest time and leave updates in this focused session designed to boost your confidence and efficiency. Learn how new validations improve accuracy, reduce errors, and get a clear overview of donated leave enhancements for smooth, compliant handling. You'll also receive tips on clock usage to help you manage time tracking effectively.

Learning objectives

After attending this session, you should be able to:

- Identify new and recent CGI Advantage timesheet features
- Efficiently handle donated leave scenarios
- Recall features and benefits of the CGI Advantage time clock solution

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

124 Workflow in Action: New Tools for Budget Routing in Performance Budgeting

Monday | 11:00 a.m. – 12:00 p.m.

Primary content area: **Budget**

Experience an end-to-end budget request approval process powered by the latest workflow enhancements. We'll explore the setup and use of capabilities such as assign and complete actions, richer email notifications, and reject-back processing, then highlight how approvers can work more efficiently through inbox optimization and search-driven workflows. This session is ideal for organizations looking to streamline approvals, reduce manual follow-up, and strengthen accountability throughout the budget request lifecycle.

Learning objectives

After attending this session, you should be able to:

- Configure new workflow actions to support a collaborative budget request scenario
- Compare options for sending requests backward and resetting data during rework
- Design an approver experience using inbox settings, email content, and search-based workflow steps

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires experience configuring budget request layouts

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 11:00 a.m. – 12:00 p.m. ET

125 Operating CGI Advantage in the Cloud: Lessons, Best Practices, and Real-World Insights

Monday | 11:00 a.m. – 12:00 p.m.

Primary content area: [Technology & Architecture](#)

Running CGI Advantage in the cloud introduces new considerations for operations, performance, and support. This session brings together lessons learned and best practices from sites at different stages of cloud adoption. Learn how to improve reliability, streamline operations, and avoid common pitfalls, whether your site is planning a move or already operating in the cloud.

Learning objectives

After attending this session, you should be able to:

- Identify best practices for operating CGI Advantage effectively in the cloud
- Analyze common challenges and lessons learned from sites at different stages of adoption
- Apply practical insights to optimize their site's cloud strategy and operations

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Information Technology
Program Level: Overview
Prerequisites: None
Advanced Preparation: None
Delivery Method: Group Live

126 Modernizing Enterprise Reporting with CGI Advantage Insight

Monday | 11:00 a.m. – 12:00 p.m.

Primary content area: [Business Intelligence](#)

Enterprise reporting has evolved significantly over the last two decades, while the core business expectations of trust, reliability, governance, scalability, and fast access to insights, remain unchanged. This session explores the shift from traditional operational reporting to modern embedded analytics and interactive business intelligence. Learn how CGI Advantage Insight supports both trusted enterprise reporting and modern self-service, embedded, and near real-time analytics within a unified platform, helping organizations preserve existing investments while improving user experience, accessibility, and decision-making.

Learning objectives

After attending this session, you should be able to:

- Explain how Insight supports conventional enterprise reporting, including structured and paginated reports
- Describe how Insight delivers modern BI capabilities, including interactive dashboards, self-service analytics, and embedded reporting
- Recognize how traditional reporting and modern analytics coexist within one governed platform
- Identify opportunities to modernize user experiences while continuing to support established operational reporting needs

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Information Technology
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
Delivery Method: Group Live

Monday, September 28 | 1:45 p.m. – 2:45 p.m. ET

131 Show Me the Money: Grantor Process from Advertising to Reimbursement

Monday | 1:45 p.m. – 2:45 p.m.

Primary content area: Procurement

Discover how CGI Advantage Grantor and Vendor Self Service can help streamline and accelerate the grants lifecycle. This session explores capabilities that support the end-to-end process, from funding opportunity announcements and application review through award management and ongoing oversight. Learn how organizations are improving efficiency, increasing transparency, and enhancing grant tracking while leveraging the tools available within CGI Advantage to better manage grant programs and outcomes.

Learning objectives

After attending this session, you should be able to:

- Clearly articulate the full range of current features and how they support effective grant management within CGI Advantage
- Gain a structured understanding of the end-to-end Grantor lifecycle
- Identify key configurations and design considerations required to successfully deploy and optimize Grantor in your organization

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Advanced

Prerequisites: Requires an understanding of CGI Advantage Vendor Self Service and Grantor functionality

Advanced Preparation: None

Delivery Method: Group Live

132 Extending Advantage: Configurable Validations and Formulas

Monday | 1:45 p.m. – 2:45 p.m.

Primary content area: HR/Payroll

Other content area: Technology & Architecture

Discover how configurable validations and formulas empower your organization to tailor CGI Advantage to your unique business requirements without custom code changes. This session will provide an overview of how business driven rules and formulas can be configured to enhance data integrity, automate logic, and enforce organization-specific policies. Through real-world client use cases and practical examples, attendees will gain insight into the value of leveraging this capability to reduce dependency on custom development.

Learning objectives

After attending this session, you should be able to:

- Use configurable validations and formulas to support specific business rules
- Identify practical use cases for improving data quality and enforcing policy
- Apply best practices for implementing and maintaining configurable rules

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires working knowledge of CGI Advantage HRM processes and basic system configuration concepts

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 27 | 1:45 p.m. – 2:45 p.m. ET

133 Designer Reimagined: Smarter Guidance, Validation, and Formulas for Budget Entry

Monday | 1:45 p.m. – 2:45 p.m.

Primary content area: Budget

Secondary content area: Technology & Architecture

See how the Designer experience can improve both budget entry and configuration speed. This session will walk through new practical use cases for page design, configurable formulas, and configurable validations, showing how they work together to guide users, prevent errors, and automate repetitive decisions. This session is best for teams actively shaping request pages and data-entry behavior.

Learning objectives

After attending this session, you should be able to:

- Build or revise a page design to improve the budget entry experience
- Implement a validation or formula pattern reducing user error

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires familiarity with request page configuration in Designer

Advanced Preparation: None

Delivery Method: Group Live

134 Extending CGI Advantage with CGI EngageHub: Platform Overview **Monday | 1:45 p.m. – 2:45 p.m.**

Primary content area: Technology & Architecture

Secondary content area: Artificial Intelligence

CGI EngageHub enables sites to extend CGI Advantage with modern, user-facing applications and digital workflows. This session provides an overview of the EngageHub platform, including how applications are built, deployed, secured, and integrated with CGI Advantage. Learn how sites can use EngageHub to streamline processes, improve user experience, and expand the value of Advantage.

Learning objectives

After attending this session, you should be able to:

- Explain how EngageHub extends CGI Advantage with modern application capabilities
- Describe how EngageHub applications are built, deployed, secured, and integrated with CGI Advantage
- Identify use cases where EngageHub can improve processes and user experience at their site
- Evaluate how EngageHub fits into their site's overall application and integration strategy

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 1:45 p.m. – 2:45 p.m. ET

135 From Access to Adoption: Staying Engaged in the new Client Collaboration Center

Monday | 1:45 p.m. – 2:45 p.m.

Primary content area: General Interest

Secondary content area: Artificial Intelligence

Discover new ways to connect, collaborate, and grow within the CGI Advantage community through the new Client Collaboration Center (CCC). In this session, we'll highlight exciting opportunities to engage with fellow users, earn badges, compete for prizes, and build meaningful professional relationships. Learn how the CCC can enhance your experience, drive value for your site, and empower you to get more out of the Advantage ecosystem.

Learning objectives

After attending this session, you should be able to:

- Describe the purpose and key features of the CCC
- Identify the different ways to engage with the CGI Advantage community through the CCC
- Apply strategies for leveraging the CCC to drive greater value and engagement within your own site

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Business Management & Organization

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

136 Deep Dive into CGI Advantage Insight Administration

Monday | 1:45 p.m. – 2:45 p.m.

Primary content area: Business Intelligence

This administrator-focused session will show you how to manage security, governance, report scheduling, and monitor data lake readiness with confidence. Learn about the latest CGI Advantage Insight administrative capabilities that provide greater visibility into your environment, simplify day-to-day administration, and help ensure users have reliable access to trusted data.

Learning objectives

After attending this session, you should be able to:

- Describe the operational capabilities available to securely manage a CGI Advantage Insight environment
- Recognize how access controls and data governance support trusted enterprise reporting
- List the scheduling capabilities available to manage and automate reporting activities
- Gain visibility into data lake readiness and the operational transparency available to administrators

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Advanced

Prerequisites: Requires working knowledge of CGI Advantage Insight reporting and report administration concepts

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 3:15 p.m. – 4:15 p.m. ET

141 Cost Allocation: What Is It Good For?

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: [Financial](#)

Allocations, chargebacks, overhead, and labor additives are essential tools for distributing costs accurately and transparently, but approaches can vary widely across organizations. This session will demystify these key concepts and show how your peers are managing them in practice. Learn how agencies are handling these necessary tasks, what methods they are using, and what lessons they have learned along the way.

Learning objectives

After attending this session, you should be able to:

- Identify common methods for cost allocation management
- Compare approaches peers are using to improve cost distribution accuracy and transparency
- Apply lessons learned and practical strategies to strengthen cost allocation processes at your site

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Specialized Knowledge

Program Level: Intermediate

Prerequisites: Requires knowledge of cost allocation and internal costing processes

Advanced Preparation: None

Delivery Method: Group Live

142 Getting on the Same Page with Unified VSS

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: [Procurement](#)

Explore the transition from batch-based synchronization between CGI Advantage Vendor Self Service (VSS) and CGI Advantage Financial to a unified, shared database model. This session outlines the conversion approach from legacy integrations, key design considerations, and lessons learned from real implementations. Gain practical guidance on implementation strategy, data governance, and change management to eliminate latency, improve data integrity, and deliver a more seamless vendor management experience.

Learning objectives

After attending this session, you should be able to:

- Apply practical lessons on conversion strategy, data governance, and change management to successfully transition from legacy integrations with minimal disruption
- Explain how moving from synchronization jobs to a shared database model improves data accuracy, reduces latency, and simplifies system operations between VSS and Advantage Financial

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Advanced

Prerequisites: Requires an understanding of CGI Advantage Vendor Self Service and the functionality it offers

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 3:15 p.m. – 4:15 p.m. ET

143 Predict, Preview, Pay: Payroll Tools in Action

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: HR/Payroll

Take more control of your payroll processing with solutions that promote accuracy, flexibility, and informed decision-making. Join us as we walk through key features, including preliminary Payroll Accounting Management (PAM), payment by warrant functionality, and how each supports a smoother payroll experience. You'll also get a sneak peek at the updated paycheck calculator and leave with practical insights to help strengthen payroll management and improve operational confidence.

Learning objectives

After attending this session, you should be able to:

- Describe how the paycheck calculator can improve payroll accuracy and employee visibility
- Identify how preliminary PAM supports proactive payroll review and issue resolution
- Evaluate the benefits and processing considerations of payment by warrant within payroll operations

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Intermediate

Prerequisites: Requires basic knowledge of payroll processing concepts and CGI Advantage payroll functionality

Advanced Preparation: None

Delivery Method: Group Live

144 Connecting SBFS and HCM Position Control for Better Budget Decisions

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: Budget

Secondary content area: HR/Payroll

This session shows how stronger Human Resource system setup improves salary and benefits forecasting in Performance Budgeting. Through site examples, we will cover position practices that matter, including grouping logic, current-year cost visibility, and formula-driven mapping processes connecting budget and HR data. Attendees will see the process and supporting configuration that help keep forecasts accurate and actionable.

Learning objectives

After attending this session, you should be able to:

- Explain which HCM position-control practices most improve salary and benefits forecasting
- Assess grouping and mapping approaches that support more reliable budget planning

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires familiarity with salary and benefits forecasting and HCM position data

Advanced Preparation: None

Delivery Method: Group Live

Monday, September 28 | 3:15 p.m. – 4:15 p.m. ET

145 Designing CGI Advantage for High Availability and Continuous Operations

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: Technology & Architecture

System availability is critical to maintaining operations and public trust. Learn how CGI Advantage supports high availability through modern architecture and platform capabilities. Explore approaches that help sites reduce disruption and improve resilience.

Learning objectives

After attending this session, you should be able to:

- Differentiate between high availability and disaster recovery approaches
- Evaluate architectural strategies that improve system resilience and uptime
- Identify actions their site can take to reduce operational disruption

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires basic knowledge of CGI Advantage environments and system operations concepts

Advanced Preparation: None

Delivery Method: Group Live

146 From ERP to Enterprise Intelligence: The Future of Government Data

Monday | 3:15 p.m. – 4:15 p.m.

Primary content area: General Interest

Other content area: Technology & Architecture

Join CGI Advantage, the Texas Comptroller of Public Accounts, and Snowflake for a forward-looking conversation on the future of government data. Moderated by Sumit Shah, CGI's lead Product and Architecture SME for Advantage, this session will bring together Clarisse Roquemore's government fiscal perspective and Snowflake's state and local data industry perspective to explore how agencies can move beyond ERP as a system of record toward more connected, accessible, and actionable enterprise intelligence.

Learning objectives

After attending this session, you should be able to:

- Describe how ERP is evolving to support broader enterprise intelligence
- Identify opportunities to unlock greater value from CGI Advantage data
- Explore how modern data platforms can complement Advantage and enable better insights
- Consider how a strong data foundation can prepare agencies for AI and future innovation

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 9:30 a.m. – 10:30 a.m. ET

251 Performance Measurement with CGI Advantage Financial Management

Tuesday | 9:30 a.m. – 10:30 a.m.

Primary content area: [Financial](#)

Performance measurement is essential to demonstrating results and driving informed decision-making. While CGI Advantage Performance Budgeting provides robust tools for tracking goals and outcomes, organizations can also leverage capabilities within CGI Advantage Financial Management to capture, monitor, and report performance information. In this session, we'll explore these options and share practical approaches for extending performance tracking, documentation, and reporting across your organization.

Learning objectives

After attending this session, you should be able to:

- Identify Financial Management capabilities that support performance tracking, documentation, and reporting
- Compare approaches for capturing and monitoring progress toward performance goals

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

252 Benefits Management Reimagined: New Features and Future Innovation

Tuesday | 9:30 a.m. – 10:30 a.m.

Primary content area: [HR/Payroll](#)

Transform your benefits administration experience with CGI Advantage Human Resource Management (HRM). Join us to explore exciting new features, enhanced enrollment capabilities, and smarter integrations designed to simplify benefits administration. Get a firsthand look at upcoming innovations that make managing diverse benefit options easier, faster, and more intuitive than ever.

Learning objectives

After attending this session, you should be able to:

- Identify new CGI Advantage HRM features and enhancements
- Apply new capabilities to enhance the enrollment experience
- Recognize the value of enhanced third-party integrations

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 9:30 a.m. – 10:30 a.m. ET

253 Outcome-Based Budgeting in Action: Measures, EngageHub, and Better Funding Decisions
Tuesday | 9:30 a.m. – 10:30 a.m.
Primary content area: Budget

Want to connect funding requests to outcomes in a way decision-makers can actually use? This session walks through an end-to-end approach for defining performance measures, capturing them in the budget process, and simplifying participation with site-defined fields. We will focus on practical design choices making outcome-based budgeting easier to launch, explain, and report.

Learning objectives

After attending this session, you should be able to:

- Define a performance-measure approach that supports outcome-based budgeting
- Map where measure collection fits into the request process and user experience

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Computer Software & Applications
Program Level: Overview
Prerequisites: None
Advanced Preparation: None
Delivery Method: Group Live

254 Future-Proof: Build, Ask and Embrace Intelligence
Tuesday | 9:30 a.m. – 10:30 a.m.
Primary content area: Business Intelligence
Secondary content area: Artificial Intelligence

The future of Business Intelligence is no longer just dashboards and reports. Organizations are rapidly moving toward conversational analytics, AI-generated insights, predictive intelligence, and proactive business recommendations. The next generation of reporting platforms must be capable of evolving continuously alongside these emerging technologies. This session explores how CGI Advantage Insight is positioned to support the future of enterprise analytics through AI-ready architecture, intelligent reporting experiences, conversational BI capabilities, and scalable integration strategies. Learn how organizations can prepare for the next era of BI while maintaining the governance, trust, and enterprise reliability required for mission-critical analytics.

Learning objectives

After attending this session, you should be able to:

- Describe how CGI Advantage Insight is positioned to evolve with emerging AI and BI trends
- Recognize the platform foundation for future analytics innovation
- Prepare for changing analytics needs while preserving conventional reporting capabilities
- Explain the importance of balancing modernization with governance, reliability, and trust
- Describe how CGI Advantage Insight can support the journey toward the next generation of enterprise analytics

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Information Technology
Program Level: Intermediate
Prerequisites: Requires working knowledge of CGI Advantage Insight functionality and a general awareness of emerging AI capabilities
Advanced Preparation: None
Delivery Method: Group Live

Tuesday, September 29 | 9:30 a.m. – 10:30 a.m. ET

255 Modern Security Strategy in CGI Advantage: Balancing Access and Risk

Tuesday | 9:30 a.m. – 10:30 a.m.

Primary content area: Technology & Architecture

As security expectations continue to rise, sites must balance stronger controls with usability and operational efficiency. This session explores how CGI Advantage supports modern security strategies through SSO, passkeys, MFA enhancements, granular access controls, encryption, and Insight reporting. Learn how to reduce risk, improve governance, and prepare for what’s next on the security roadmap.

Learning objectives

After attending this session, you should be able to:

- Compare authentication options including SSO, passkeys, and MFA enhancements
- Analyze how component and row-level security support governance and risk reduction
- Identify opportunities to strengthen their site’s overall security posture

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires basic knowledge of CGI Advantage security concepts and user access management practices

Advanced Preparation: None

Delivery Method: Group Live

256 Agentic AI in CGI Advantage: From Assistance to Autonomous Action

Tuesday | 9:30 a.m. – 10:30 a.m.

Primary content area: General Interest

Other content area: Artificial Intelligence

Move beyond AI assistants and explore how agentic AI can plan, decide, and take action across business workflows. This session introduces the concept of AI agents within CGI Advantage, how they differ from traditional automation and generative AI experiences, and where they can deliver meaningful value today. We’ll ground the discussion in practical use cases, governance considerations, and the capabilities needed to safely operationalize agent-driven processes.

Learning objectives

After attending this session, you should be able to:

- Understand what agentic AI is and how it differs from generative AI and traditional automation
- Identify high-value use cases for AI agents within CGI Advantage processes
- Recognize the governance, security, and oversight considerations required for agent-driven execution
- Evaluate where agentic AI can realistically be introduced in the near term vs. longer-term roadmap

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires basic knowledge of AI concepts, workflow automation, and business process operations.

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 11:00 a.m. – 12:00 p.m. ET

261 Tax Year 2026 Updates: IRS Enhancements and the Move to IRIS Tuesday | 11:00 a.m. – 12:00 p.m. Primary content area: **Financial**

IRS-driven tax changes for tax year 2026 are bringing new requirements, system updates, and process considerations for organizations preparing and filing information returns. This session explores the tax enhancements being introduced in response to IRS changes, with a focus on how organizations can prepare for updated filing expectations, improve compliance readiness, and reduce year-end processing challenges. We will also introduce the IRS Information Returns Intake System (IRIS), including its role as the IRS's modernized intake platform for electronic information return filing, available through the Application-to-Application (A2A) submission methods.

Learning objectives

After attending this session, you should be able to:

- Identify IRS-driven tax changes and updated filing requirements for tax year 2026
- Apply system enhancements and process updates to support information return filing and compliance readiness
- Describe the purpose and role of IRIS and A2A submission methods

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Specialized Knowledge

Program Level: Intermediate

Prerequisites: Requires basic knowledge of tax reporting processes and information return filing activities

Advanced Preparation: None

Delivery Method: Group Live

262 Inventory in Action: Connecting Procurement and Inventory Management Tuesday | 11:00 a.m. – 12:00 p.m. Primary content area: **Procurement**

Inventory capabilities within CGI Advantage are often underutilized. Join us to explore the full inventory lifecycle and its critical connection to procurement while discovering ways to improve efficiency, accuracy, and operational visibility. This session highlights both established and newly introduced features within CGI Advantage, demonstrating how to better align inventory management with purchasing processes. Learn practical approaches to improve visibility, reduce discrepancies, and streamline operations to drive stronger control and more informed decision-making across your supply chain.

Learning objectives

After attending this session, you should be able to:

- Leverage both existing and new CGI Advantage capabilities to reduce discrepancies, streamline workflows, and enable more data-driven inventory and purchasing decisions at your site
- Describe the inventory lifecycle from requisition through receipt, storage, and consumption

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 11:00 a.m. – 12:00 p.m. ET

263 Performance Journey: Building a High-Performing Workforce **Tuesday | 11:00 a.m. – 12:00 p.m.** **Primary content area:** HR/Payroll

Discover how CGI Advantage Performance Journey helps organizations modernize performance management with a unified approach that replaces paper-based processes and disconnected third-party solutions. This session will explore the complete employee performance lifecycle, including goal setting, 360-degree feedback, evaluations, and succession planning. Learn how Performance Journey can streamline processes, improve workforce visibility, and support the development of a more engaged and high performing organization.

Learning objectives

After attending this session, you should be able to:

- Describe the key capabilities of the Performance Journey module
- Explain the available administrative options and configuration settings
- Outline the succession planning process

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Intermediate

Prerequisites: Requires familiarity with performance management concepts and CGI Advantage HRM functionality

Advanced Preparation: None

Delivery Method: Group Live

264 Capture the Moment: Using Request Snapshotting to Track Budget Change **Tuesday | 11:00 a.m. – 12:00 p.m.** **Primary content area:** Budget

New request snapshotting makes it easier to preserve and compare budget requests over time. In this session, you will see how to capture snapshots at major stages or budget years, compare versions, and use reporting to explain what changed and when. This is a strong fit for sites needing clearer auditability, better communication, and faster answers during review.

Learning objectives

After attending this session, you will be able to:

- Create a snapshot strategy aligned to budget stages or years
- Compare snapshots to identify and explain changes in budget requests

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 11:00 a.m. – 12:00 p.m. ET

265 Evolving CGI Advantage Architecture with Control Plane and Event-Driven Design

Tuesday | 11:00 a.m. – 12:00 p.m.

Primary content area: **Technology & Architecture**

Modern platforms require flexibility, scalability, and real-time responsiveness. This session explores how control plane and event-driven architecture are evolving CGI Advantage to meet these needs and what this means for sites planning for the future.

Learning objectives

After attending this session, you should be able to:

- Explain how control plane and event-driven patterns support modern platform needs
- Analyze how these architectural approaches enable scalability and real-time processing

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Advanced

Prerequisites: Requires basic knowledge of CGI Advantage architecture concepts and system integration principles

Advanced Preparation: None

Delivery Method: Group Live

266 CGI EngageHub in Action: Real Solutions from Real Clients

Tuesday | 11:00 a.m. – 12:00 p.m.

Primary content area: **General Interest**

Secondary content area: Artificial Intelligence

See how organizations are using CGI EngageHub to deliver real business outcomes. In this client-led session, presenters will showcase applications they've built, the problems they set out to solve, and the impact they've achieved. The focus is on practical capabilities, lessons learned, and ideas others can apply in their own environments.

Learning objectives

After attending this session, you should be able to:

- Recall real-world use cases enabled by CGI EngageHub across different functional areas
- Describe how organizations are extending CGI Advantage to meet unique business needs
- Apply practical lessons from client experiences, including challenges and successes

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 1:30 p.m. – 2:30 p.m. ET

271 Invoicing: Let Me Count the Ways

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: Financial

Secondary content area: Artificial Intelligence

Vendor invoices come in many forms, channels, and formats, creating challenges for efficient and consistent processing. This session combines CGI Advantage capabilities with real-world implementation experiences to explore how organizations are managing invoice complexity. Learn how agencies are streamlining invoice processing, improving automation, and strengthening controls while accommodating a wide range of purchasing and payment scenarios.

Learning objectives

After attending this session, you should be able to:

- Recognize common challenges with processing vendor invoices from multiple sources and formats
- Explore system capabilities that improve invoice processing efficiency
- Compare implementation approaches used to strengthen invoice workflows and controls

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires a basic understanding of accounts payable and invoice processing concepts

Advanced Preparation: None

Delivery Method: Group Live

272 Becoming a Procurement Superstar with CGI Advantage Procurement

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: Procurement

Whether you're new to CGI Advantage Procurement or looking for a refresher on the latest capabilities, this session provides a guided tour of the end-to-end procurement lifecycle. Explore key functionality across the procurement process, discover enhancements introduced in recent feature releases, and revisit valuable capabilities that may be underutilized or not yet implemented. You'll leave with a better understanding of how to maximize the value of your procurement solution and identify opportunities for improvement.

Learning objectives

After attending this session, you should be able to:

- Describe the full procurement lifecycle within CGI Advantage
- Identify newly released features and underutilized functionality, with practical insight on how to adopt them to enhance performance, transparency, and user effectiveness

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 1:30 p.m. – 2:30 p.m. ET

273 Position Management: From Budget Authorization to Workforce Visibility

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: HR/Payroll

Secondary content area: Budget

Position management is more than creating and filling positions. Join us as we explore the full position lifecycle within CGI Advantage, beginning with upfront position budgeting and authorization, through configuration, tracking, and ongoing management. We will also demonstrate how reporting and visibility tools can help your organization monitor budgetary spend, track position status, and support other critical HR and operational decision-making.

Learning objectives

After attending this session, you should be able to:

- Describe the end-to-end position management lifecycle
- Identify tools and processes used to track position status, budget utilization, and workforce activity
- Utilize reporting capabilities to support HR operations

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Intermediate

Prerequisites: Requires familiarity with HR position management processes and basic CGI Advantage HRM functionality

Advanced Preparation: None

Delivery Method: Group Live

274 Beyond BI: CGI Advantage Insight as the Enterprise Data Platform

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: Business Intelligence

Other content area: Artificial Intelligence

Modern organizations need more than dashboards and reports. They need a scalable, governed, and connected enterprise data platform. This session explores how CGI Advantage Insight extends beyond traditional BI through a scalable data architecture and integrated data lake strategy that supports enterprise analytics, operational reporting, data integration, and future AI initiatives. Learn how organizations can centralize trusted data, enable unified analytics, and support enterprise-wide intelligence and digital transformation with a platform designed for scalability, interoperability, and long-term innovation.

Learning objectives

After attending this session, you should be able to:

- Describe how CGI Advantage Insight extends beyond BI as a scalable, governed, and connected enterprise data platform
- Recognize its support for enterprise data warehouse and data lake strategies
- Identify opportunities to centralize trusted data across enterprise sources
- Describe how the platform enables secure data sharing across multiple cloud platforms
- Explain how a unified data platform supports analytics, reporting, and AI initiatives

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Advanced

Prerequisites: Requires working knowledge of analytics platforms, data integration, and enterprise reporting concepts

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 1:30 p.m. – 2:30 p.m. ET

275 Unlocking Real-Time Integration with CGI Advantage Connect

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: Technology & Architecture

Sites are increasingly moving from file-based interfaces to real-time integration. This session introduces CGI Advantage Connect and demonstrates how it enables modern API-driven integration, improves responsiveness, and reduces reliance on custom interfaces. Learn where Connect fits within your integration strategy, explore common use cases, and gain practical insights for improving integration, reducing maintenance, and supporting more connected business processes.

Learning objectives

After attending this session, you should be able to:

- Explain how CGI Advantage Connect supports real-time, API-driven integration
- Compare when to use Connect versus other integration approaches
- Identify initial use cases where their site can adopt real-time integration

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

276 Surviving Budget Season: How West Virginia Automated 90% of Its Budget Book

Tuesday | 1:30 p.m. – 2:30 p.m.

Primary content area: Budget

Budget season has a fixed deadline, but everything else keeps moving — more data, more agency requests, more approvals, and less time to ensure quality. In this client-led session, the West Virginia team and F.H. Black & Company share how they connected CGI Advantage ERP data to an automated publishing process, automating more than 90% of the budget book. The result was not just speed: a significant last-minute change was absorbed without panic, the team finished hours ahead of deadline, and they produced the most accurate budget bill in more than a decade. Just as importantly, West Virginia maintained ownership of the process. Join us for practical, transferable lessons on turning budget production from an annual survival exercise into a controlled, repeatable process your team owns.

Learning objectives

After attending this session, you should be able to:

- Identify risks associated with manual budget book production
- Describe how ERP data and automated publishing streamline budget production
- Evaluate practices that support in-house ownership of automation
- Apply a control-first approach to prioritize automation opportunities

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 2:45 p.m. – 3:45 p.m. ET

281 ACFR Panel Discussion

Tuesday | 2:45 p.m. – 3:45 p.m.

Primary content area: **Financial**

The pace of GASB change shows no signs of slowing. From Statements 83 through 105 to upcoming guidance on Infrastructure Assets, Going Concern Uncertainties and Severe Financial Stress, and Revenue and Expense Recognition, finance organizations continue to face complex implementation decisions. Join fellow ACFR practitioners for an interactive discussion of real-world experiences, lessons learned, and practical implementation strategies. Hear what worked, what didn't, and what participants would do differently if given the opportunity. Whether you're preparing for future guidance or refining existing processes, this session will provide insights and ideas you can apply within your own organization.

Learning objectives

After attending this session, you should be able to:

- Identify key implementation challenges associated with upcoming GASB guidance
- Compare practical approaches peers have used to address implementation and reporting requirements
- Apply best practices to improve future GASB implementation efforts within your site

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Specialized Knowledge

Program Level: Advanced

Prerequisites: Requires familiarity with annual reporting preparation processes and government accounting standards

Advanced Preparation: None

Delivery Method: Group Live

282 Payments: Let Me Count the Ways

Tuesday | 2:45 p.m. – 3:45 p.m.

Primary content area: **Procurement**

Demystify payment innovations in public sector finance by exploring the differences between p-card, virtual card, and instant card solutions. This session highlights when and how to use each method to improve control, speed, and transparency in procure-to-pay operations. Learn practical approaches to implementing these tools within CGI Advantage Financial, including integration considerations, policy alignment, and operational best practices to drive efficiency and strengthen financial oversight.

Learning objectives

After attending this session, you should be able to:

- Describe the different payment methods within CGI Advantage
- Identify configurations, features and business cases associated with each payment type method

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires familiarity with payment processing methods and procure-to-pay concepts

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 2:45 p.m. – 3:45 p.m. ET

283 HR and Payroll Panel: Insights, Ideas, and Open Discussion **Tuesday | 2:45 p.m. – 3:45 p.m.** **Primary content area:** HR/Payroll

This interactive session turns the traditional conference format on its head by making the audience the panel—yes, this is back by popular demand! This session brings attendees together to share their expertise in HR, payroll, and time and leave. Let's talk experiences, discuss challenges, exchange practical ideas, and learn from peers in an open and collaborative environment. Whether you are looking for new perspectives, proven approaches, or simply a lively discussion, this session is your opportunity to connect and contribute.

Learning objectives

After attending this session, you should be able to:

- Identify common HR, payroll, and timesheet challenges and evaluate practical approaches discussed by peers
- Apply ideas and best practices shared by other organizations to improve internal processes and collaboration
- Leverage insights gained through community discussion to support more informed decision-making and operational improvements

Additional information

Participants will earn 1.0 CPE credit
 Field of Study: Personnel/HR
 Program Level: Basic
 Prerequisites: None
 Advanced Preparation: None
 Delivery Method: Group Live

284 Hidden Helpers in Budgeting: Limits, Documentation Tabs, and Modeling Choices **Tuesday | 2:45 p.m. – 3:45 p.m.** **Primary content area:** Budget

Some of the most practical budgeting tools are also the easiest to overlook. This session highlights budget limits, documentation tab patterns, and form-building approaches that can improve guidance and control without major redesign. You will see where each feature fits in the process, how sites configure it, and what tradeoffs to weigh before adoption.

Learning objectives

After attending this session, you should be able to:

- Identify use cases for budget limits and documentation tab instruction and entry patterns
- Evaluate the benefits and tradeoffs of using modeling to build budget forms

Additional information

Participants will earn 1.0 CPE credit
 Field of Study: Computer Software & Applications
 Program Level: Basic
 Prerequisites: None
 Advanced Preparation: None
 Delivery Method: Group Live

Tuesday, September 29 | 2:45 p.m. – 3:45 p.m. ET

285 What's New in CGI Advantage: Key Capabilities Driving Impact

Tuesday | 2:45 p.m. – 3:45 p.m.

Primary content area: Technology & Architecture

Secondary content area: Artificial Intelligence

Explore the latest CGI Advantage capabilities delivered over the past year and learn how organizations are using them to improve efficiency, usability, and control. This session highlights key innovations across the platform, demonstrates practical use cases, and explores the business value these enhancements can deliver. Whether you're looking to optimize existing processes or take advantage of newly released functionality, you'll gain insights to help maximize the value of your CGI Advantage investment.

Learning objectives

After attending this session, you should be able to:

- Identify key capabilities delivered in recent CGI Advantage feature sets
- Analyze how new features improve efficiency, usability, and control
- Determine which capabilities are most relevant to their site's priorities

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Overview

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

286 Prompting for Results: Unlocking Generative AI in Advantage

Tuesday | 2:45 p.m. – 3:45 p.m.

Primary content area: General Interest

Secondary content area: Artificial Intelligence

Generative AI is only as effective as the prompts behind it. This session focuses on practical prompt strategies that unlock real value across CGI Advantage features like transaction summary, file to transaction, and smart analysis. Attendees will learn how to structure prompts, refine outputs, and apply repeatable techniques to improve accuracy, consistency, and usefulness.

Learning objectives

After attending this session, you should be able to:

- Apply practical prompt patterns to improve accuracy and relevance of AI outputs
- Explain how prompting impacts results across key CGI Advantage AI features
- Apply techniques for refining, iterating, and validating AI-generated outputs
- Identify common prompting pitfalls and how to avoid them

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Information Technology

Program Level: Intermediate

Prerequisites: Requires basic familiarity with generative AI concepts and CGI Advantage functionality

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 4:15 p.m. – 5:15 p.m. ET

291 Real Talk: Stories of New Feature Implementations

Tuesday | 4:15 p.m. – 5:15 p.m.

Primary content area: [Financial](#)

Grab a front row seat for our late-night talk show session as guests share how they planned for, implemented, and adopted new CGI Advantage Financial Management features to improve efficiency and make better use of time and resources. Through candid stories, practical insights, and lessons learned, guests will discuss what worked, the challenges they encountered, and what they would do differently. Discover how these enhancements delivered measurable improvements to day-to-day operations and gain ideas you can apply within your organization.

Learning objectives

After attending this session, you should be able to:

- Identify strategies for planning and implementing new functionality
- Apply peer insights and practical approaches to support process improvements within your own organization

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

292 Modernizing Government Procurement: Client Perspectives and Practical Strategies

Tuesday | 4:15 p.m. – 5:15 p.m.

Primary content area: [Procurement](#)

Join a dynamic, client-led panel exploring how government organizations are modernizing procurement to better serve agencies and vendors. Hear firsthand perspectives on balancing centralized and decentralized models, improving customer service to internal stakeholders, and strengthening vendor communication strategies. Panelists will share practical approaches, lessons learned, and actionable insights to enhance transparency, efficiency, and collaboration across the procurement lifecycle.

Learning objectives

After attending this session, you should be able to:

- Compare centralized and decentralized procurement approaches and their impact on service delivery and governance
- Identify strategies to improve customer service to internal agencies and vendors

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires a basic understanding of CGI Advantage Procurement and processes at your site

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 4:15 p.m. – 5:15 p.m. ET

293 Everyday Efficiencies: Tips, Tools and Troubleshooting

Tuesday | 4:15 p.m. – 5:15 p.m.

Primary content area: HR/Payroll

Explore practical tips, tools, and techniques designed to improve efficiency and simplify everyday system processes. This session will cover additional address and paycheck routing options, the Timesheet Adjustment (TADJ) wizard, and common troubleshooting approaches to help users navigate challenges more effectively. Gain useful insights and best practices that support smoother processing, quicker issue resolution, and increased confidence using the system.

Learning objectives

After attending this session, you should be able to:

- Describe how additional address and paycheck routing options support user flexibility and processing needs
- Identify how the TADJ wizard can streamline adjustment and time-related processes
- Apply basic troubleshooting techniques to efficiently resolve common system issues

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Personnel/HR

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group Live

294 Design Analytics That Explain the Budget Story in Performance Budgeting

Tuesday | 4:15 p.m. – 5:15 p.m.

Primary content area: Budget

Secondary content area: Business Intelligence

Strong analytics do more than display numbers; they explain decisions. This session focuses on designing CGI Advantage Performance Budgeting analytics to answer common budget questions, compare scenarios, and highlight trends over time. We will cover the data design choice, and presentation techniques that help analysts and leaders move from raw data to action.

Learning objectives

After attending this session, you should be able to:

- Translate a budget business question into an effective analytic design
- Apply layout and visualization practices that make analytics easier to interpret

Additional information

Participants will earn 1.0 CPE credit

Field of Study: Computer Software & Applications

Program Level: Intermediate

Prerequisites: Requires familiarity with Performance Budgeting data structures and reporting concepts

Advanced Preparation: None

Delivery Method: Group Live

Tuesday, September 29 | 4:15 p.m. – 5:15 p.m. ET

295 Ask the Experts: CGI Advantage Strategy and Technology Panel **Tuesday | 4:15 p.m. – 5:15 p.m.**

Primary content area: Technology & Architecture

Secondary content area: Artificial Intelligence

Join an interactive panel of CGI Advantage experts to discuss strategy, architecture, and real-world challenges. Bring your questions and engage directly with product and technical leaders. Whether you are planning future initiatives, evaluating new capabilities, or addressing operational challenges, you'll gain practical guidance and expert perspectives to support informed decision making at your organization.

Learning objectives

After attending this session, you should be able to:

- Formulate questions related to CGI Advantage strategy, architecture, and operations
- Evaluate expert insights to inform site-specific planning and decision-making
- Identify practical approaches to address challenges discussed during the session

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Information Technology
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
Delivery Method: Group Live

296 Client-Led Support: Building Effective Tier 1 Help Desks and Vendor Support **Tuesday | 4:15 p.m. – 5:15 p.m.**

Primary content area: General Interest

This session brings together members of the CGI Advantage community to share real-world approaches to delivering effective Tier 1 help desk services. Join us for an interactive discussion on how clients structure their support models, leverage tools, and implement processes to support both end users and Vendor Self Service (VSS). Through peer exchange and practical insights, we'll explore what's working, identify common challenges, and begin shaping a set of best practices to strengthen support across the community.

Learning objectives

After attending this session, you should be able to:

- Describe common Tier 1 support models used by CGI Advantage clients for end-user and vendor support
- Identify tools, technologies, and processes that improve help desk efficiency and support quality
- Apply peer insights and emerging best practices to strengthen support operations

Additional information

Participants will earn 1.0 CPE credit
Field of Study: Business Management & Organization
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
Delivery Method: Group Live

Build your schedule

Session block 1 | Monday, September 28 | 9:30 a.m. – 10:30 a.m. ET

Session number	Session title

Session block 2 | Monday, September 28 | 11:00 a.m. – 12:00 p.m. ET

Session number	Session title

Session block 3 | Monday, September 28 | 1:45 p.m. – 2:45 p.m. ET

Session number	Session title

Session block 4 | Monday, September 28 | 3:15 p.m. – 4:15 p.m. ET

Session number	Session title

Session block 5 | Tuesday, September 29 | 9:30 a.m. – 10:30 a.m. ET

Session number	Session title

Session block 6 | Tuesday, September 29 | 11:00 a.m. – 12:00 p.m. ET

Session number	Session title

Session block 7 | Tuesday, September 29 | 1:30 p.m. – 2:30 p.m. ET

Session number	Session title

Session block 8 | Tuesday, September 29 | 2:45 p.m. – 3:45 p.m. ET

Session number	Session title

Session block 9 | Tuesday, September 29 | 4:15 p.m. – 5:15 p.m. ET

Session number	Session title

Attendees from Forum 2025

Alabama, State of
Anaheim, City of (CA)
Anne Arundel County Public Schools (MD)
Arizona, State of
Austin, City of (TX)
California State Payroll System
Cincinnati, City of (OH)
Cleveland, City of (OH)
Cobb County (GA)
Colorado Division of Parks and Wildlife
Colorado, State of
Columbus Consolidated Gov't. (GA)
Dallas, City of (TX)
Fulton County (GA)
Harris County (TX)
Honolulu, City and County of (HI)
Illinois State Office of the Comptroller
Iowa, State of
Kent County (MI)
Kentucky, Commonwealth of
Los Angeles County (CA)

Los Angeles County Office of Education (LACOE)
Maine, State of
Maricopa, County of (AZ)
Massachusetts, Commonwealth of
Mecklenburg County (NC)
Mesa, City of (AZ)
Michigan, State of
Modesto, City of (CA)
Montana DOT
Nevada, State of
Norfolk, City of (VA)
Ocean County (NJ)
Olmsted County (MN)
Orange County (FL)
Palm Beach County (FL)
Prince William County Public Schools (VA)
Rockville, City of (MD)
San Diego County (CA)
Southwest Florida Water Mgmt. District (FL)
Springfield, City of (IL)

Texas Comptroller
Tulare County (CA)
Utah, State of
Ventura, County of (CA)
Volusia County (FL)
West Virginia, State of
Wyoming, State of





Earning CPE credits at Forum 2026

Continuing Professional Education (CPE) credits can be earned by participating in eligible CGI Forum sessions. CPE credits are awarded based on instructional time in accordance with NASBA standards. The number of credits available for each session is indicated in the session description. Participants must meet NASBA attendance requirements to receive credit. No partial credit will be granted.

CGI is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.



NASBA National Registry of CPE Sponsors

150 Fourth Avenue North, Suite 700

Nashville, TN 37219

866.627.2286

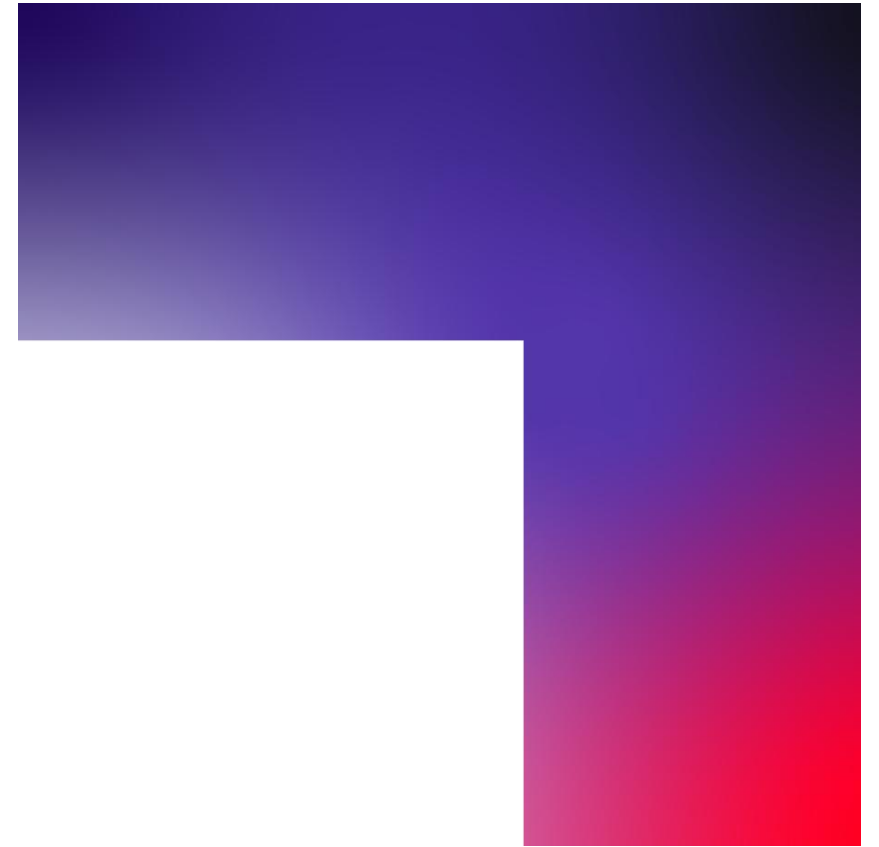
cpe@nasba.org

Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-focused to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

cgi.com



CGI