



Utilit-e Insight Class Schedule February 2010 – December 2010

This represents the 2010 training schedule for *Utilit-e Insight*. All training will be offered as Webinars via remote access, with the exception of the report writing classes. The webinars will be recorded, showing both audio and video. The video recording will be available on the PCS website the day following the webinar. This is beneficial as the video recording can be used as needed. By offering this training via Webinar, it will provide the utility with the opportunity to allow more of the staff to participate plus the added value of using the recorded session over and over. The registration fee for the training webinars is included with the Annual Support Agreement.

There are times when utilities have training needs that aren't specifically accommodated by the standard class offerings. PCS is willing and committed to help each utility with its training needs. In an effort to do so, PCS will work with any utility or group of utilities to devise specific classes tailored to the specific needs of a utility or group. Custom designed classes can be offered via Webinar, onsite, or at PCS based on what best fits the needs of the utility or group. Such training classes are handled as a request card.

Webinar schedules, outlines, and registration forms are posted on the PCS website at www.pcsc.com.

Utilit-e Solutions – Excel Report Writing Workshop

The Excel Report Writing Workshop is designed to be an hour session offered remotely multiple times a year. The agenda, or focus topic(s) for each session, will be driven by user submissions, items the support team has identified as areas where people are struggling, and/or features or functionalities to add to the report writer's repertoire.

- **Prerequisite:** *Utilit-e Connect* or *Utilit-e Insight* Report Writing using Microsoft Excel class which includes, "Where's the Data" at PCS.
- Tuesday, January 19, 2010.
- Wednesday, March 17, 2010.
- Tuesday, May 18, 2010.
- Wednesday, September 22, 2010.
- Thursday, November 18, 2010.
- Anticipated class length is approximately 1 hour.

Utilit-e Insight Accounts Payable and Payroll Void Check Process

- This webinar will demonstrate how to void an Accounts Payable check both during the process of writing checks as well as after checks have been kept. Participants will see how to write a new check, and how to clear the AP voucher if no check is to be written. A discussion on how to manage voided payroll checks will also take place.
- Prerequisite: *Utilit-e Insight* – completed installation and implementation training.
- Wednesday, February 17, 2010.
- Anticipated webinar length is approximately 1 ½ hours.

Utilit-e Insight Unclaimed Property

This webinar will be an overview of the Unclaimed Property module and its uses that include writing an unclaimed property check, processing un-cashed checks, the voiding of outstanding AP, PR, or CC checks and sending those amounts to Unclaimed. Also included will be the capability to apply amounts

in Unclaimed to billing accounts and to mark items in Unclaimed as Sent to State. The process of applying service charge amounts to existing unclaimed remaining dollars will also be covered.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training and Capital Credits module completed installation, implementation and training.
- Wednesday, April 21, 2010.
- Anticipated class length is approximately 2 hours.

Utilit-e Insight Reconciling Inventory Variance Account

During this webinar the instructor will demonstrate and explain how to reconcile the inventory variance account. This account is used during the purchase order receiving and AP voucher processes. When the invoice amount is different than the receipt amount, this account can be affected.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training.
- Tuesday, May 11, 2010.
- Anticipated class length is approximately 1 hour.

Utilit-e Insight Employee Portal

PCS will demonstrate the new employee portal that is being developed in 2010. There are two pieces that are in the works at this point. One is an employee information area, where an employee can sign in to a website and see their check history, deduction and benefit information, withholding exemptions, etc. A second piece is an employee time entry system where an employee can enter their time, submit it to their supervisor for approval, and then have it uploaded to the Payroll time entry screen.

- **Prerequisite:** No prerequisites for this webinar.
- Thursday, July 22, 2010.
- Anticipated class length is approximately 2 hours.

Utilit-e Insight What's New

Attend this webinar for a full review of the enhancements that have been added to the *Utilit-e Insight* application during 2009 and 2010. Start taking advantage of the enhancements!

- **Prerequisite:** There are no prerequisites for this webinar.
- Wednesday, August 11, 2010.
- Anticipated class length is approximately 2 hours.

Utilit-e Insight Capital Credits Retirement Process

This webinar will go through the Capital Credits Retirement Process. The main focus will be on the general retirement, but time will also be spent discussing how to handle an estate retirement. *Utilit-e Insight* Capital Credits offers options for sending retirement amounts to the *Utilit-e Connect* billing application rather than producing a retirement check and these options will be discussed.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training and Capital Credits module completed installation, implementation and training.
- Tuesday, October 12, 2010.
- Anticipated class length is approximately 2 hours.

Utilit-e Insight Inventory – Physical Inventory

The procedures required for counting and processing Physical Inventory, including the adjusting entries made to the General Ledger will be covered during this webinar. The instructor will cover how to setup and enter the original count, as well as entering a re-count on certain items.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training.
- Tuesday, November 9, 2010.
- Anticipated class length is approximately 1 hour.

Utilit-e Insight Payroll – W-2's and 1099's

This process can change from year to year due to IRS changes and form changes. The goal of this webinar will be to update the participants on new features and review the processes that need to be completed in order to properly produce the W-2 and 1099-MISC forms from *Insight*.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training.
- Thursday, December 16, 2010.
- Anticipated class length is approximately 2 hours.

General Information

Registration Information:

For registration materials, contact Dana Ingerslev at 888-843-3106 or by e-mail at danai@pcsko.com. Deadline for registration is 30 days prior to the webinar. PCS reserves the right to cancel any webinar due to low participation.

Payment:

The Annual Support Agreements provide the opportunity for clients to attend training webinars remotely via the Internet using Live Meeting and attendance at the Annual User Group Meeting at no additional charge. The published webinars are on the PCS website. Implementation training is not included.

Microsoft Excel training is not included with the Annual Support Agreements. Payment for the Microsoft Excel training must be received two weeks prior to the training class.

Cancellation Policy:

Cancellations must be received one week prior to training when held at the PCS office. Webinars must be cancelled one day prior to the scheduled training.

Failure to Cancel:

Registrants failing to cancel prior to the start of the event are subject to a \$25 cancellation fee. Fee assessment will be on a case-by-case basis in the event of unavoidable personal or business related emergencies.

All requests for refunds must be sent in writing by fax, letter or e-mail to Dana Ingerslev.

Substitutions:

Substitutions for a prepaid registration may be made at anytime up to the beginning of the event. When making a substitution, please specify class and person for whom the substitution is being made.

Class Materials:

PCS will provide one copy of all materials needed for class. The PCS training materials will be accessible via the PCS website and clients will have the ability to download and print as many copies as needed before or after the training classes.