



Utilit-e Connect

Webinar and Class Schedule

January 2016 – December 2016

This represents the 2016 training opportunities for *Utilit-e Connect*. 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 webinar and 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 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 Connect – Hints and Tips

This webinar is open to *Connect* users of all levels. Various hints and tips will be provided. It is hard to know what little tips and tricks users may or may not know. So some of this may be old hat to you but we fully expect each participant to learn at least a couple new ideas. Topics to be covered include: sequential look ups, keyboard shortcuts, windows shortcuts and more.

- **Prerequisite:** Knowledgeable in *Utilit-e Connect* basic functionalities including service orders (e.g., read-outs and read-ins)
- Thursday, January 21, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Business Intelligence-What is Business Intelligence?

Are you using BI today? If not, you need to attend this session. See what Business Intelligence is all about. In this session you will see a demonstration of BI workbooks for both *Utilit-e Insight* and *Utilit-e Connect*, and learn what BI can do for you. We will also talk about the BI implementation process.

- **Prerequisites:** none
- **Who should attend:** This session is geared towards clients interested in implementing BI or those that want to learn what it's all about.
- Wednesday February 10, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Connect – Correct Completed Service Order

This webinar will walk the user thru the Correct Completed Service Order wizard that allows the user to fix an incorrect connect date, disconnect date or reading.

- **Prerequisite:** Knowledgeable in *Utilit-e Connect* basic functionalities including service orders (e.g., read-outs and read-ins)
- Thursday, March 17, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Connect – Batch Processor

Batch Processor is designed to automate processes and reports without user intervention. This webinar will educate the user on how the Batch Processor may help each of their utilities by enabling several reports and processes ranging from daily balancing reports to billing processes and month end close to execute during off hours.

- **Prerequisite:** Knowledgeable in *Utilit-e Connect* basic functionalities
- Thursday, April 14, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Business Intelligence-Pivot Tables

Pivot tables are a powerful tool in excel to summarize and display data. This webinar will give you a better understanding of pivot tables. Learn some tricks for using, modifying or making new pivots.

- **Prerequisites:** BI
- Who should attend: BI users
- Wednesday, May 11, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Solutions System Manager

This webinar is intended for the primary manager(s) of the PCS software at your utility. Whether you are an *Insight* user or a *Connect* user, your user security rights or login and menu options can be controlled from within *System Manager*. During this webinar, we will go over the key components of the *System Manager* interface with a focus on user and period entry security settings.

- **Prerequisite:** *Utilit-e Insight* – completed installation and implementation training.
- Wednesday August 10, 2016 at 1:30 pm Central
- Anticipated class length is approximately 1 hour.

Utilit-e Connect – Delinquency -What Aren't You Using?

Learn more about what *Utilit-e Connect* has to offer in regards to Delinquency. This webinar will expound on standard features and functionalities. Some you may be using today but maybe not to their fullest extent and others you may not be utilizing at all. Additionally, this webinar will explore enhanced features and functionalities available that may be of benefit to you and your utility including extension, payment arrangements, return check letters, deposit letters and much more. The purpose of this session is to expand your training and knowledge of *Utilit-e Connect*.

- **Prerequisite:** Must be knowledgeable in *Utilit-e Connect* basic functionalities
- Tuesday, September 13, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 2 hours

Utilit-e Business Intelligence-Financial Statements

Take a detailed look at the comprehensive financial workbook that has been developed. See how quickly and easily the data is pulled together from the *Insight, Connect* and budget databases. Then to the next step – presenting that data in numerous formats for your board and internal accounting needs. The BI financials eliminates the need to compile data from several reports in preparation for board presentations. Discuss how recording monthly unbilled revenue can impact your monthly income statement presentation.

- **Prerequisites:** None
- Wednesday, September 21, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Connect – Balancing & More

This webinar will give you an in depth view of two Business Intelligence workbooks that are now being offered as a part of the core *Connect* solution.

Automated Month End Balancing spreadsheet:

With minimal input and the click of a button this workbook pulls in *Utilit-e Connect* beginning and ending balances, totals from the Revenue Summary, Other Cash Summary and Cashiering batches updated throughout the month. The spreadsheet also pulls in *Utilit-e Insight* data such as beginning balance, ending balance, and General Ledger entries. The automated Month End Balancing spreadsheet allows the user to quickly see if *Connect* and General Ledger are in balance.

Consumption Recap:

The Consumption Recap spreadsheet takes your paper Consumption Recap to the next level. The spreadsheet includes drill downs to view which accounts make up each amount shown on the consumption recap along with several charts and graphs. The report also has built in flexibility to run for multiple periods, or just certain rates or revenue codes.

Sign up to take a peek at these spreadsheets and the benefits they can provide to your utility.

- **Prerequisite:** Knowledgeable in *Utilit-e Connect* basic functionalities including service orders (e.g., read-outs and read-ins)
- Thursday, October 20, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Connect – Prepay

PCS will review the newest module in **Connect**. The Prepay module provides customers another way to manage their interaction with the utility. Plus it helps them see and manage their usage and payment schedule. Sign up and learn what features and capabilities are provided with the new Prepay module.

- Automated debt recovery management
- Automated daily billing
- Review payment methods including:
 - Customer Portal via the Internet,
 - Mobile Customer Access via a phone/tablet,
 - Walk in via Cashiering, and
 - Call in
- Customer notifications as balance gets low
- No True Up
- No Third Party

- **Prerequisite:** Knowledgeable in **Utilit-e Connect** basic functionalities including service orders (e.g., read-outs and read-ins)
- Thursday, November 17, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

Utilit-e Business Intelligence-What's new in Business Intelligence?

The BI team is continually developing new BI reports. This session will take a look at the new things we've been doing in BI.

- **Prerequisite:** None
- Wednesday, December 14, 2016 @ 1:30 pm Central
- Anticipated webinar length is approximately 1 hour

General Information

Registration Information:

For registration materials, contact Nikki Greve at 888-843-3106 or by e-mail at nikkig@pcsko.com. Deadline for registration is 10 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 GoToWebinar 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.

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.