Utilit-e Insight
Class Schedule
January 2016 – December 2016

This represents the 2016 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 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.pcsco.com.

*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 Insight -Employee Portal Time Entry

Our Employee Portal Time Entry system allows individual employees to enter their time through a web interface. These timesheets are routed through the system for approval and eventual upload into the *Insight* Payroll module. This webinar will walk through the complete process, from entry to submittal to approval to *Insight* upload. If you have been considering ways to improve your timesheet system, you should attend this webinar.

- **Prerequisite**: There are no prerequisites for this webinar.
- Tuesday, February 16, 2016 at 1:30 pm Central
- Anticipated webinar length is approximately 2 hours.

Utilit-e Insight -Accounts Payable ACH

One of our newest offerings in the *Insight* Accounts Payable module is the ability to create an ACH file rather than printing checks. This can also be taken a step further by having e-mail notifications sent to your vendors when an ACH file has been processed. In this webinar, we will walk through the process of setting up vendors to be paid via ACH and creating these files through AP. We will also take a look at the e-mail notification process and what the notifications can look like for the vendors involved. This webinar is recommended for any user responsible for the AP module, particularly those who have not yet implemented AP ACH but are interested in doing so.

- **Prerequisite**: There are no prerequisites for this webinar.
- Tuesday, April 19, 2016 at 1:30 pm Central
- Anticipated webinar length is approximately 45 minutes to 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 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.

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

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 11, 2016 at 1:30 pm Central
- Anticipated webinar length is approximately 2 hours.

Utilit-e Solutions- **Payroll – W-2 Forms & 1095 Forms**

The W-2 forms and 1095 forms webinar will be a review of the common once-a-year printing of paper W-2 forms, as well as a more in-depth look at creating electronic W-2's for submittal to either the Social Security Administration and/or your state department of revenue. We will also cover any changes to the W-2 that might be new for the 2016 tax year. We will also take a look at the newer process, instituted in 2015, of uploading ACA 1095 forms. This webinar is recommended for any user responsible for printing and submitting the W-2 and/or 1095 forms.

- **Prerequisite**: *Utilit-e Insight* – completed installation and implementation training.
- Tuesday, December 6, 2016 at 1:30 pm Central
- Anticipated webinar length is approximately 1 hour.

Utilit-e Insight- **Accounts Payable – 1099 Forms**

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 1099-MISC form from *Insight*.

- **Prerequisite**: *Utilit-e Insight* – completed installation and implementation training.
- December 7, 2016 at 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@pcsco.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 GoToWebinars 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.