



31st Annual User Group Meeting
June 4-7, 2018



All sessions and classes are located at the Boulders Conference Center and will begin at 9:00 am with an hour lunch break.

PCS is excited to announce the agenda for the upcoming 31st Annual User Group Meeting. Following is a brief description of the classes and general sessions that will be offered during the week of June 4th, 2018.

Monday, June 4, 2018

Spindustry – Microsoft Excel Training

Class time, 9:00 am to 4:00 pm

Spindustry is the leading provider of comprehensive Microsoft training services. In the one-day focused training, Spindustry will be providing instructor led hands on training for Microsoft Excel. Excel is used commonly across the business world and will benefit any participant. The morning session will be a beginner's class as outlined below.

Excel Beginning - Tips & Tricks to Create a Spreadsheet

This class has something for everyone. If you are new to Excel or looking for Tips & Tricks!

- Customize the Quick Access Toolbar, Pin documents, become familiar with the Ribbon
- Create, Save, Open and Print workbooks
- Learn tips to modify, navigate and edit a worksheet
- Work with formatting features to wrap text in a cell, center cells across a selection and clear formatting from cells
- Use the AutoFill Feature and the AutoFill SmartTags
- Work with multiple worksheets to insert, delete, rename and copy worksheets
- Work with large worksheets to keep the column headings always visible, print the column headings on multiple pages, sort a list of data
- Build a basic formula using cell references and create formulas using functions

The afternoon session will be for more advanced users as outlined below.

Excel Intermediate – Working with Formulas, Tables and Charts

- Formulas and Basic Functions
 - Building Formulas
 - Understanding the Order of Operation
 - Building Functions using AutoSum, Average, Max, Min
 - Absolute vs Relative Cell References
- Intermediate Formulas
 - Naming Ranges
 - Using Logical Functions – IF statement
 - Using Lookup Functions – VLOOKUP, MATCH
- Analyze data in a List
 - Sort, Filter and Subtotal
- Work with the Table Feature
 - build, sort and filter lists of information using the Table feature
 - Add data to a Table
 - Use the Total button
- Work with Pivot Tables
 - create a PivotTable report
 - Set Number Formats
 - Update a PivotTable
 - Add Slicers to a PivotTable

The instructor for the class will be Pamela Smith. Pamela comes with an in-depth knowledge of the Microsoft Office environment. Class size is limited, so please register early. **Cost for this class is \$200 per participant whether you attend one or both sessions.**



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Utilit-e Connect -Getting Started (2 ½ days)

All day Monday & Tuesday and Thursday morning

Class time, 9:00 am – 4:00 pm

This Getting Started class is an expansion on the former **Connect 101** class. This class is a subset of the training that would be provided to users when your utility first implemented **Utilit-e Connect**.

Participants will be educated on the screens of the Customer Service module, service order initiation and completion, as well as, Cashiering functionalities. Newer users have probably been given some internal training in these areas to get them started, but this would be an opportunity for them to hear the bigger picture of how these pieces fit together. Time permitting the class will also get into readings and a little of the delinquency processes and procedures. This class will be hands on and each participant will need to bring a laptop with Office 7 or higher.

This class will not go into any utility specific procedural steps. Should utilities want to pursue additional training or more utility specific training after this class, remote and/or onsite training can be scheduled.

Utilit-e Connect -General Service Orders

Class time, 9:00 am – 12:00 pm

General Service Orders (GSO's) provides an electronic means to communicate and monitor various work requests. These requests may originate from a customer via the phone, in person or through the Internet. GSO's are also a great tool to communicate and monitor internal efforts. Various utilities are utilizing GSO's to manage the following types of activities – tree trimming requests, high bill complaints, voltage checks, service upgrades, or letters of credit, etc. This session will not only show how to use GSO's, but it will also teach the user how to setup new GSO types tailored to fit the utility's needs.

Utilit-e Suite -PBI – Endless Possibilities

Class time, 9:00 am – 12:00 pm

The next generation of Business Intelligence is here. Come see your data in a new light! In this session we will give users a taste of the endless possibilities with Power BI. Create and share dashboards from pre-built parts. See your data in a high level visual, or drill down to the detailed column and rows that Power BI offers.

Utilit-e Connect -Balancing

Class time, 1:00 pm – 2:30 pm

This session is designed to provide you with tools and approaches to help you better attack balancing. You will get an in-depth view of two Business Intelligence workbooks that are available as a part of the core **Connect** solution. No additional BI license required.

- **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:** It's a spreadsheet that 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. It also has built in flexibility to run for multiple periods or just certain rates or revenue codes.



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Utilit-e Connect -Working Smarter Not Harder

Class time, 2:45 pm –4:00 pm

Sometimes when you are doing something do you say to yourself – “there’s gotta be a better way”. That’s always a good question. This session is designed to follow up on those thoughts. ***Utilit-e Connect*** has many features and functionalities and no one is using all of them. What that means – is there may be some existing features and functionalities that you and your utility could benefit by using.

This session is designed to help you learn more about what ***Connect*** has to offer. This session will expand on standard features and functionalities. Some functions you may be using today but not to their fullest extent. While others you may not be utilizing at all. Additionally, this session will explore available functionalities and enhanced features that may be of benefit to you and your utility. The purpose of this class is to expand your knowledge of ***Utilit-e Connect*** possibilities.

Utilit-e Insight – What’s New

Class time, 1:00 pm – 2:30 pm

A lot has been happening in the past year with enhancements and improvements to the ***Insight*** application. This session will look at those changes and discuss what’s next.

Utilit-e Insight – Preparing for an Audit

Class time, 2:45 pm – 4:00 pm

This session will talk about preparing for an audit and what is expected of you and the software. This will be an interactive session where we will be looking for examples of common things an auditor will ask for. The intent being, can we offer additional reports or suggestions on getting to the data you need.

Each day at 4:30 pm, a walking group will meet in the lobby of the conference center and take a hike! We will have a short route and a long route, so bring your walking shoes. Let’s take a break from work and enjoy the scenery!

Monday evening Welcome Reception

A welcome reception will be held at the Majestic Hills Grill at 6:30 pm. The Grill is in the lower level of the Boulders Conference Center. Everyone is invited to join the PCS staff and clients for food and refreshments.



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Tuesday, June 5, 2018

Utilit-e Insight – Getting Started with GL, AP, AR

Class time, 9:00 am to 12:00 pm

Utilit-e Insight getting started is a ½ -day class designed for new users of *Insight*. We will cover the General Ledger, Accounts Payable, and Accounts Receivable modules and if time permits Cash Manager will also be included. Key areas and processes such as AP check processing will be discussed.

Utilit-e Insight – Intro to Insight Web Apps

Class time, 1:00 pm to 4:00 pm

During this session we will present short demonstrations of our Employee Portal, Self-Time Entry, and the brand-new Requisitions module. We will also talk about and ask for your feedback on potential future enhancements. Those could include a tie-in to an attendance system from time entry, employee requests for things like time off and deduction changes that would be tied to payroll, a new look and feel for the Employee Portal, and how Requisitions may tie into Purchasing.

Utilit-e Suite – How Does Your Work Flow?

Class time, 9:00 am – 12:00 pm

Today's utility business must deal with evolving reporting requirements, legal and regulatory issues, competition from distributed energy sources, pressure to reduce the cost of doing business, and the ever-changing utility business.

To address these requirements the utility must reconsider and optimize the way they do business and change their processes to support evolving business requirements of the utility.

There is a new generation of applications being delivered by PCS. These applications provide secure access to data from inside and outside the walls of the business, available on desktop, laptop, tablet and phone, and do not require any special installation of software. These applications will also provide and incorporate a workflow engine.

As we have discussed in previous user meetings, workflow is the definition, execution and automation of business processes where tasks, information or documents are passed from one participant to another for action, according to a set of procedural rules.

This session will provide education on the workflow process, demonstration of an actual workflow, discuss current and future possibilities for workflow automation.

We will discuss:

- Workflow Management Systems (WFMS) and how they function.
- Business Process Management (BPM) and how to analyze business processes.
- Demonstrate how workflow functions in Purchase Requisitions.
- Discuss other manual workflows at utilities and discuss how to automate.

Participants in this session will experience a greater understanding of the value of workflow management systems and the need to analyze current business practices.

The result; if a utility can implement and automate just a few manual and paper processes, will ultimately reduce paper shuffle, increase collaboration, streamline operations, resulting in saving time and money. All of this by implementing and automating a few business practices.



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Utilit-e Connect – Touch & Discuss

Class time, 1:00 pm – 4:00 pm

Part of the effort of the UGM is to present high-level vision of what has been recently developed, is being developed or being considered for development. We haven't, however, circled back to talk more about it, let you touch and feel it and/or provide enough opportunity to ask more questions about how and why you might use it. We have several newer modules that we want to provide you those opportunities.

To facilitate that, this session will provide you opportunity for small groups, hands on interaction with the following features/functionality:

- Web Customer Service (Web CS)
- Mobile Service Orders (MSO)
- Outage Call Handling (OCH)
- New Statement Layout/Design
- Payment Possibilities &/or Questions
- Online/MCA/IVR

Each of these Touch & Discuss roundtables will be facilitated by a PCS area specialist.



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Wednesday, June 6, 2018

General Session

The General Session will provide an overview of recent development efforts and the upcoming development roadmap. In addition, multiple focus topics will be presented. The focus topics for the morning will include:

- Outage Call Handling module & integration:
 - PCS will provide a demonstration of the Outage Call Handling interface. This allows customer service to enter an outage call into the system. If there is an OMS, PCS will forward the call to the OMS, if there is not an OMS, PCS will retain the call and allow Customer Service the ability to sort, filter and map the calls selected.
- CRC Offerings & Opportunities:
 - Dan Otteson from CRC will provide an overview of the services available from Cooperative Response Center (CRC) for after-hour call handling. In addition, CRC provides additional services including taking customer payments, and entering outage calls.
- Security Alert
- Tracking the Fleet:
 - A representative from Verizon will be providing an overview of Verizon Fleet Management Solutions. Utilities can now track where the fleet is in real-time including location, direction, speed, and other attributes. PCS will also be discussing integration plans to provide easy access from within the PCS Applications.
- Engaging Your Customers –
 - PCS and representatives from utilities will be providing ideas on how to educate, promote and interact with your customers.

Our vendor partners will be displaying their solutions all day, be sure to take time and visit their booths.



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Wednesday Afternoon Sessions

Class times, concurrent 1:00 pm – 4:00 pm

Utilit-e Connect Empowering Your Customer 24 x 7

All utilities goals and missions are to serve and provide customers what they need and want. Over the years, PCS has built many tools to help in doing that. The focus of this session is to help see all the possibilities and how you can utilize them to better serve your customers while improving on utility efficiencies. In the morning session, we will be talking about engaging your customers. This session focuses on what to engage them about and how both the customer and the utility can benefit.

Utilit-e Insight – Balancing; Hints & Tips; and Best Practices

This session will be packed with information on balancing the GL to the subsidiaries, hints and tips to make your life easier and best practices to use to keep all the modules in sync.

Is Your Data Safe? – Utilit-e Central and IT Services

This session will highlight the services provided by our System Administrators and will include, but not be limited to:

- Windows Server 2019 Release
- PCS Cloud Backup Service
- Managed Workplace RMM (remote monitoring & management service) New Security Monitoring
- Sophos New Endpoint Protection, more than just Antivirus
- SonicWall Firewall Security Management as a service, no longer have to buy firewalls outright
- Security Assessments
- Network Performance Monitor (NPM)
- Office 365 Suite

Wednesday evening, dinner will be held at the Boulders Conference Center following the day's activities. Refreshments start at 6:00 pm with dinner being served at 6:30 pm.

Entertainment: Brandon Aronson, Magician, Comedian and all around good guy!



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Thursday, June 7, 2018

Architects at Work – Designing the *Connect* Future

Class time, 9:00 am – 12:00 pm

This session is designed to get your ideas and feedback on PCS' future development projects. This is your opportunity to enlighten PCS with ideas you would like considered or incorporated into upcoming development efforts. Development in process and potential new development projects that will be demonstrated or discussed include:

- Next Round of Features & Enhancements
 - Online
 - MCA
 - MSO
- Amount Owed to Reconnect Visibility
- Verizon Fleet Integration
- And more...

***Utilit-e Insight* – Designing the *Insight* Future**

Bring your ideas. What can we do to make *Insight* work better for you? If we have 30 participants, we know we will have 30 different opinions. But that's ok, it's our job to try to give you the most bang for your buck. We will have a list of requested changes to work from but talk to your *Insight* staff before coming to the meeting and bring your list of requests and ideas.



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Thank you to our sponsoring vendor partners!



A registration form is included with this information or you can complete the form online at www.pcsc.com on the client area page.

Forms should be completed and returned to PCS by Thursday, May 31, 2018.

The cost of the meeting is included with the annual maintenance and support fees. The Spindustry Microsoft Excel class fees are listed on the registration form. Cost for this class is \$200 per participant whether you attend one or both sessions.

A continental breakfast will be provided Tuesday, Wednesday and Thursday morning. Lunch will be available Monday through Thursday. Dinner will be available Tuesday and Wednesday evening. All meals will be at the Boulders Conference Center complex. Feel free to choose the entire meal deal or any combination of meals. There are no refunds on the meal deal plans.

To reserve your hotel accommodations, call one of the hotels or bed & breakfasts listed below. There is a block of rooms held at both Boulders Inns.

Hotel	Boulders Inn, Majestic Hills	712-263-2200
Hotel	Boulders Inn, Oak Ridge	712-263-2833
B&B	Glidden House	712-263-2238
B&B	Providence Inn	712-263-5548
B&B	Hartwig House	712-263-4573

PCS staff will be available for individual appointments during the week as needed. Schedule an appointment with the PCS support staff to discuss software needs, implementing an upgrade, or to discuss general topics within the *Utilit-e Insight* or *Utilit-e Connect* applications. The IT system administrators will also be available to discuss hardware requirements and general system needs.



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