32nd Annual User Group Meeting
June 4-6, 2019

PCS is excited to announce the agenda for the upcoming 32nd 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, 2019.

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.

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!

Tuesday, June 4, 2019

Spindustry – Microsoft Excel Training
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

- o Build, sort and filter lists of information using the Table feature
  - o Add data to a Table
  - o Use the Total button
- Work with Pivot Tables
  - o Create a PivotTable report
  - o Set Number Formats
  - o Update a PivotTable
  - o 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.

Utilit-e Connect Getting Started
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 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 Insight 101
9:00 am to 12:00 pm
This session has been held in prior years but is always popular and worth repeating. It is intended for both users that are new to the ***Insight*** application as well as experienced users that may want to brush up on their knowledge or learn some forgotten hints. For example, do you know how to sort lookups? Do you remember how to make columns on the screen narrower and hide those you don't use? Several of the modules will be featured with an emphasis on the General Ledger, Accounts Payable, and Payroll.

Utilit-e Suite -Power BI – Endless Possibilities
1:00 pm – 2:30 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.

PCS Workflow Solutions
2:45 pm – 4:00 pm
Last year during the User meeting, PCS spent a full afternoon discussing the value of workflow, routing and tracking of information in the office and the benefits of automation. We just discussed the concept of workflow. This year, PCS will present the overall development in workflow including:

- The mechanics of workflow
- The three workflow rule sets (ad hoc, direct, and rules) and how they function
- The three solutions built and ready to implement: Employee Requisitions, Employee Time Off Request, General Workflow

As time permits, the group will discuss potential future workflows. With an actual workflow engine built and ready to implement, participants will be able to vote on future workflow development.

Building Blocks to the Enterprise
1:00 pm – 4:00 pm

This session will introduce the solutions provided by Central Service Association (CSA) that are now part of the PCS Enterprise. These solutions include: Orbit Meter Data Management, UtiliTrak GIS, UtiliStake Staking, UtiliSuite Outage. Participants will come away with an understanding how these modules build the utility enterprise and how current PCS applications will seamlessly integrate with them. Many utilities have some of these pieces of the enterprise puzzle in place. PCS and CSA can assist in completing this puzzle for the utility, even if parts of the solution are not provided by PCS or CSA. PCS encourage clients to have staff that are involved with metering, mapping, staking and outage to join us for the introduction presentation. This session will provide an overview of each solution with time allowed for questions.

Orbit MDM: Meter Data Management

The growth of automated metering infrastructure (AMI) has created tremendous opportunities within the utility world, but it has also created an abundance of sometimes overwhelming and often unusable data. **Orbit** MDM offers data storage for interval meter readings from a wide array of AMI vendors. It also offers reading validation, editing and estimating for anomalies like missed and out-of-range readings, and more. The base MDM system also provides billing determinates, including time-of-use and coincident peak information to *Utilit-e Connect* CIS for accurate and up to date billing information.

In addition, **Orbit** MDM provides advanced analytics that include time-of-use reports, editable midnight register reports, vacant meters with usage, meters with usage not assigned to accounts, daily reads by meter vendor, customer and location usage summaries. The advanced analytics option also offers meter audit reports like hi/low consumption anomalies, meter rating exceeded, multiple day bad meter reads, anomaly summary charts and more.

UtiliSuite: GIS

UtiliSuite is CSA's suite of GIS solutions for utilities and consists of four components: UtiliTrak®, UtiliCom UtiliStake and UtiliView. UtiliTrak and UtiliCom are standalone applications that enable a utility to map and model its network infrastructure whereas UtiliStake is an add-on application to UtiliTrak that enables a utility to integrate its staking process within a GIS environment. UtiliView is a standalone application that takes data from UtiliTrak and enables a utility to view its maps on an iPad or iPhone. A short overview of each module includes:

UtiliTrak GIS

UtiliTrak serves as the data warehouse for a utility's network infrastructure by storing in one location the data required for utilities to keep track of their infrastructure while providing the necessary interfaces by which that data is available for use by other applications.

UtiliStake

UtiliStake integrates a utility's staking process within UtiliTrak and keeps the network models in UtiliTrak up to date through the daily work process as staking jobs are stepped through their defined life cycle and completed. UtiliStake also integrates with work management systems so construction unit data maintained in a utility's work management system is available in UtiliStake.

UtiliSuite Outage

Utility customers often consider the phone to be the most direct route to answers in an emergency, they can't tolerate to hear a busy signal — even in high-traffic moments. Make sure you have a solution that has the power to make those busy signals disappear.

Orbit IVR system helps you to pick up every customer call during activity spikes by routing customers to a highly efficient interactive voice response cloud platform. The system identifies the customers by their phone number and enables painless authentication. It then collects and feeds pertinent information to your outage management system.

As the Orbit Outage handles all outage-related needs, your contact center lines stay open to support more complex calls that require agents' attention. Come see the power of Orbit IVR and Outage…

Wednesday, June 5, 2019

General Session
Meet Central Service Association

PCS will begin the day with an introduction of the CSA team. This will include a presentation by CSA Chief Executive Officer, Tom Underwood. Mr. Underwood will provide a short history of CSA. Roger Smith, CSA Chief Business Development Officer and PCS Chief Operating Officer will provide an overview of CSA solutions available to PCS clients and the vision of the future project innovation.

Meet the Managers

This session will include a short overview by each Manager as to the focus of activities in their department, including new features, projects in process and an outline of what is on the schedule for the remainder of this year.

Angie Miller, Business Services

Marc Rowedder, Financial Applications

Carl Ladwig, Information Technology

Shelley Lee, Business Intelligence

Kim Ingerslev, Marketing

Promote the Utility's Products and Services
Becky Burk, Communications Coordinator, Appalachian Electric Cooperative

As Communications Coordinator for Appalachian Electric Cooperative, Becky's principal function is to provide content and craft key messages. Her favorite thing to do is telling stories that serve to connect people. Becky states, "Sometimes I tell these stories myself; other times, I write the stories and give 'em to others at our Co-op to tell." Examples include press releases for the local media, a quarterly section in the magazine published by their statewide association, print ads marketing their programs and services, and a monthly newsletter published for employees, retirees, and directors.

"I think a lot about stuff like how effective communication can boost member engagement and the importance of brand identity/management. I'm famous for asking questions and I'm known for my inclination to speak truth to power. I'm not above stealing other people's ideas—but only the really good ones." Becky will give great ideas for getting the message out to your members and customers.

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

Wednesday Afternoon Sessions

Concurrent 1:00 pm – 4:00 pm

Information Technology
The IT team will be reviewing activities related to the PCS hosting center and protecting your utility from Cyber Attack. The team will also be discussing disaster recovery, which will roll into

related topics for new services that will include a replication site. This site can be setup for cold, warm and hot operations.

CSA has several technologies that are now available to PCS clients including a device called Intrusion Detection System (IDS). An IDS has visibility into and analyses everything going across your network, searching for indications of malicious activity and compromise. These systems have been used in enterprises for many years now, but for small to midsize businesses it has traditionally been very difficult to justify the steep costs to purchase, deploy and maintain such a system in an ongoing basis.

The CSA team has integrated several technologies into an IDS sensor that can be deployed at a single office or across multiple locations. Our security team initially spends several weeks collecting and analysing data from your network. We then apply that data to the IDS system, tuning it specifically to your environment. Updates are regularly installed on the sensors from several CSA-vetted sources including the Department of Homeland Security.

The hosting center has implemented several major enhancements this year, IT professionals will want to understand these very important topics.

Utilit-e Insight

The first hour of Wednesday afternoon will be an overview of changes we've made to ***Insight*** over the past year. There was a heavy emphasis on payroll during the year; we will review and demonstration those, as well as some changes and enhancements to other modules. Here's a sample of other items we will show and tell:
- Ability to do a negative deduction in payroll
- Viewing a paper staking sheet directly from the work order screen
- Auditor reports, such as who created a batch and who posted it, and when
- Requisitions and Workflow; these also have their own sessions on Tue & Thu
- Payroll benefit adjustment screen
- CFC US Bank OneCard interface to AP
- Nelco tax forms (also part of Thursday morning roundtables)

The 2nd topic of the afternoon will be a 20-minute review/demonstration of our new "Meeting Registration" module.   This app allows you to scan registration cards on an iPhone/iPad, Android, or Windows device. It can be used for annual meetings, employee meetings, etc. The data is stored in a database.

The 3rd topic of the afternoon will be a discussion on future development items. PCS has a list of items we would like to do, but we'd like to hear what your software needs are. These could be as small as a new report, to a new feature in GL-AP-etc., to a brand-new module. Bring your ideas and suggestions.

Possible items to discuss include:
- Changes/improvements to budgeting process
- Human Resources module
- What processes to add to workflow
- More employee interaction through Employee Portal – deduction changes, etc.

Utilit-e Connect

This afternoon, come and get a taste of what's new within **Utilit-e Connect**.
The team will be demonstrating new features and functionalities developed and/or implemented this past year. In addition, we will delve into what's in the works for this upcoming year.

Introducing the following:

- Statement Redesign
- Visibility of Amount to Pay
- New Service Order Print
- OCH - Notification to Utility Staff
- Batch Processor Enhancements
- ARO Payments - Online & Payment Options Screen
- PSN - Card Maintenance
- Progress Removal - status update

New capabilities in design and/or development:

- Electronic Payments - Reconciling Issues
- Statement Redesign - Phase 2
- Net Metering - Additional Calc Rules
- **Utilit-e Online** Admin Portal
- **Utilit-e Online** - Usage Data Export
- Web CS - Additional Screens
- Progress Free Bill Calc
- PCS - CSA Integrations
- Plus, other ideas you may have

Wednesday evening

We will be traveling to Templeton, Iowa to tour the Templeton Rye Distillery. If you are not familiar with the folk lore of Templeton Rye, follow this link; http://www.templetonrye.com/ and check it out! Keith Kerkoff, distillery founder and friend, will be personally conducting our tour. After the tour, dinner will be served.

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

Thursday, June 6, 2019

Utility Operations, Putting Technology to Work   9:00 am – 12:00 pm

This session will role play different areas of technology and how it benefits the utility. Each part will be a short 15-20 presentation which will conclude with a response from the team on "Why is this important to the utility".

Presentation topics include:
1. BoardBook
2. Meeting Registration
3. Outage Call Handling to OMS or OCH not an OMS
4. MSO in operation
   a. Getting service orders, acting on the finishing and uploading and even reassigning an order.
5. How many ways can we allow a customer to pay
6. Helping the customer with Web CS tools including
   a. Member Services in the field
   b. Customer making a payment
   c. Review the account
   d. Creating an extension
   e. Creating an outage call
7. How can the customer help themselves?
   a. View their account with Online and MCA
   b. If I have been disconnected, how can I see what I need to pay to be reconnected
   c. How can I download my usage
   d. How can I see real-time demand
   e. Read out or possibly read in to a service
   f. Receive a message from the utility
8. Employee Self-service
   a. How can I is see my Payroll Record
   b. How can I request time off
   c. How can I enter my time
   d. How can I request to purchase something for the utility
   e. How can I be notified when a customer has paid to be reconnected
   f. How can I see work that has been put in my name
9. Managing my day with workflow
   a. Getting work that has been assigned by others to me
   b. Acting on work
   c. Creating a work flow and assigning to other people

Meet at the Round Table

Last year's *Connect* Touch & Discuss round table session was such a hit, this year it is being expanded to include *Insight*. 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. The purpose of this session is to let you touch and feel it and/or provide enough opportunity to ask more questions about how and why you might use it.

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

Connect

- ✓ Electronic Payments – Reconciling Issues
- ✓ Net Metering – Banked History
- ✓ *Utilit-e Online* /MCA
  - Admin Portal & Usage Data Export
- ✓ Outage Call Handling

- ✓ Statements Redesign
- ✓ Web CS
- ✓ Mobile Service Orders
- ✓ Payment Possibilities and /or Questions

Insight

- ✓ Time Off Requests
- ✓ Employee Portal & Time Entry
- ✓ Power BI
- ✓ Document Management (Search Express)

- ✓ Nelco Year-End filing
- ✓ Employee Requisitions
- ✓ Meeting Registration App
- ✓ Workflow

Please indicate your top six topics in order of preference on the included separate sheet (with 1 being your highest ranking).

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

Forms should be completed and returned to PCS by Friday, May 24, 2019.

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 Tuesday through Thursday. Dinner will be available Tuesday and Wednesday evening. All meals will be at the Boulders Conference Center complex, expect for Wednesday evening. 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

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.