



Pennsylvania User Forum Agenda

8:30 - 9:00 AM | Registration & Breakfast

- Breakfast and networking
- Registration and name tags

9:00 - 9:30 AM | Welcome, Introductions & Company Update

- Welcome and introductions
- Purpose and goals for the day
- Company update and presentation

9:30 - 11:00 AM | Reporting & Data Analysis

- Standard and custom reporting options
- Caselle miExcel / Excel Connector reporting and analysis
- Exporting and working with data
- Choosing the right reporting tool for your needs

11:00 - 11:30 AM | Getting the Most from the Support Portal

- Maintaining portal users
- Looking up and reviewing existing tickets
- Creating and managing support tickets
- Finding answers through the Knowledge Base

11:30 AM - 12:00 PM | Connect Tips & Tricks

- User and application options
- Report filters
- Checklist notifications
- Additional time-saving features

12:00 - 1:00 PM | Lunch & Caselle Online Preview

- Lunch
- Preview and demonstration of Caselle Online

1:00 - 2:00 PM | Utility Management: New Tools & Features

- New Form Designer
- Comparing existing and new forms/reports
- When and how to transition to the new Form Designer
- Exporting data
- Scheduling tasks and reports
- Meter reading interface

2:00 - 2:30 PM | Budgeting in Connect & miExcel / Excel Connector

- Budgeting directly within Connect
- Using miExcel / Excel Connector for budgeting and analysis

2:30 - 3:00 PM | Cash Receipting & Caselle Citizen Portal

- Overview of the new Citizen Portal
- Online utility payments and additional portal services
- Processing online payments
- Reconciling deposits and payment activity

3:00 - 4:00 PM | Open Q&A: Bring Your Questions

- Interactive session for questions about Connect, processes, reporting, workflows, and other topics