Illinois Infinite Visions User Group Meeting for October 4th, 2018
Finance and Purchasing/Payables Session

Welcome & Introductions 10:00 a.m. – 10:30 a.m.
- Save the Date for: Tyler Connect 2019 Conf. on April 7th – 10th, 2019 in Dallas, TX
- Selection on Next Meeting Date & Hosting Site for 2019
- User Center Design – Seeking Volunteers!
- Reminder: Tyler website for User Group Meetings: https://www.tylertech.com/the-tyler-experience/events/user-group-meetings
- Reminder: Tyler website for Trainings: www.tylertech.com/IVTrainingSchedule
- Items marked with a red asterisk* Denotes topic on agenda from client’s survey results

*Learning Tips & Tricks on: 10:30 a.m. – 11:00 a.m.
- Difference between highlighting a portion of the text versus using the % syntax
- Learn to Use the decimal to replace question mark logic in account code filter, ex. 001.???.???.5410 = 001…5410
- Learn how to filter by Date Range in grids
- Update: Grids: preserving leading zero’s in grid when exporting to excel, Sum of Grid View Amounts, Expand Head Row Col. Height

Finance and Purchasing & Payables Session 11:00 a.m. – 12:00 p.m.
Presented by Cassandra Knight, Tyler Technologies
- iVisions Dashboards for Financials
- Have you ever wanted your internal forms to be in Visions? Let’s learn how to create User Defined Forms.

Luncheon 12:00 p.m. – 12:45 p.m.

Finance and Purchasing & Payables Session 12:45 p.m. – 2:00 p.m.
- What’s New: G/L Default Settings – Trans. Begin Date no longer needs to be changed for posting Beg. Fund Balances
- Enabling Budget Notes in Budget Columns and available in Account Level Budgeting, Budget Input, Budget Export/Import and Budget Copy Utility
- Grid Listings can be viewed with 2 new fields, Last Run On and User Id
- Unlocking the Append Notes on an Invoice in Invoice Processing by clicking on the
- What’s the Post/Refund Credit utility? Let’s find out!
- What’s New: Freight Vendor
- Q & A’s

*Breakout Sessions - Open Discussion 2:00 p.m. – 3:00 p.m.
- *Bring your Topics

Adjournment 3:00 p.m.

Your feedback is important to us. Please access our brief post-meeting survey at Tylertech.com/UGIV