AGENDA

Yuma County Infinite Visions User Group Meeting for September 20th, 2018
Finance & Personnel Agenda

Welcome & Introductions 9:30 a.m. – 10:00 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
- Reminder: Tyler website for User Groups: https://www.tylertech.com/the-tyler-experience/events/user-group-meetings
- Reminder: Tyler website for Trainings incl. SDER: www.tylertech.com/IVTrainingSchedule
- Items marked with a red asterisk* *Denotes topic on agenda from client's survey results*

*Learning Tips & Tricks incl. Updates: 10:00 a.m. – 10:30 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 ???.??.???.5410 = ...5410
- Update: Grids: preserving leading zero's in grid when exporting to excel, Sum of Grid View Amounts, Expand Head Row Col. Height

*AFR Reporting & Overview 10:30 a.m. – 12:00 p.m.

- *Presented by Tracy McLaughlin, Itinerant Business Manager from MCESA*
- *Access ADEConnect directly in Infinite Visions/iVisions – Setup overview (Arizona State Reporting guide, pages 46-50)
- Q & A's

Luncheon 12:00 p.m. – 12:45 p.m.

Finance & Purchasing/ Payables Session 12:45 p.m. – 2:30 p.m.

- Unlocking the Append Notes on an Invoice in Invoice Processing by clicking on the
- Voucher Processing – Difference of 3 Way Quantity Match -vs- PO/Invoice Dollar Match and selecting the Select All Matched Invoices from the Actions menu
- What's the Post/Refund Credit utility? Let's find out!
- What's New: Freight Vendor
- What's New: Enabling Budget Notes in Budget Columns
- Clearing your Encumbrances in P/P *(parked from last meeting)*
- Q & A's

Adjournment 2:30 p.m.

Your feedback is important to us. Please access our brief post-meeting survey at Tylertech.com/UGIV or by scanning the QR code below.

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