



Basics of CaseWare for Local Governments

Kelowna, BC
May 28, 2012



Learn how CaseWare can assist you in preparing annual financial statements and internal reports.

WORKSHOP OBJECTIVES:

To provide those with little or no CaseWare experience with the base level of knowledge required to begin using the product in their municipal government.

WHO SHOULD ATTEND:

This seminar was designed for those who have just purchased CaseWare but have not yet begun implementing or those who tried to implement and had problems. No real CaseWare experience or training.

BENEFITS OF ATTENDING:

By completion of this course, participants will have created a basic electronic audit binder complete with lead-sheets and work-papers. Further, they will have an understanding of the fundamental principles that ensure the efficient use of the product.

SPECIFIC TOPICS TO BE COVERED:

- Planning - using CaseWare to prepare for your auditor/council/board,
- Creating a new file,
- Importing balances,
- Grouping,
- Creating lead-sheets & adding supporting documentation,

Participants must bring a laptop with a full licensed copy of CaseWare Working Papers 2011 or better installed in order to participate in this course.

ABOUT THE WORKSHOP LEADER:

Jamie Black, Partner & Director of IT Services for F.H. Black & Company, provides consulting and training services to municipal governments and Government Business Enterprises throughout Canada and the U.S.

With more than 15 years experience implementing CaseWare, Jamie has encountered nearly every scenario possible. From implementing Working Papers to automate quarterly procurement reports for a territorial government to automating annual financial statements for a small county in Alberta, he is certain to have encountered concerns or questions similar to yours.

In addition to Jamie's CaseWare responsibilities, he is also a recognized seminar and webinar presenter for CaseWare, Intuit and Alan Salmon & Associates. Jamie is a Subject Matter Specialist in Management Accounting and Information Systems and Business Automation with the CGA, CMA and CA Societies in Manitoba, Saskatchewan and Alberta.

Workshop Location & Dates

May 28, 2012
Delta Grand Okanagan Resort
1310 Water Street
Kelowna, BC
8:30 a.m. – 4:30 p.m.

Accommodations

[Delta Grand Okanagan Resort](#)
Kelowna, BC
1-800-465-4651
Ask for GFOA BC Rate – from \$190/night

Registration Fees

Register here - <http://www.civicinfo.bc.ca/event/casewarebasics.asp>

\$400 + HST – members

\$360 + HST – 2nd participant from your municipality (limit of 2 per municipality)

Or register using PD points – 10 required for the 1st person/9 required for 2nd

Registration includes coffee, muffins & lunch.

A maximum of 16 people will be allowed in the course; a minimum of 12 people are required to proceed.

*This course provides 7 verifiable hours of training.
Check with your professional association to confirm that this qualifies for your personal CPD record.*