



Skills for use of CaseWare in Local Governments

Kelowna, BC
May 29, 2012



**Learn how to use CaseWare to produce
your Financial Statements and
management reports.**

WORKSHOP OBJECTIVES:

To provide insight to those with CaseWare experience on how best to utilize CaseWare in the municipal government environment to simplify the reporting processes and reduce the risks of error.

WHO SHOULD ATTEND:

This seminar was designed for those who have used CaseWare in public practice or another setting, but want to learn how to best utilize the tool to deal with municipal challenges like segmented disclosure.

BENEFITS OF ATTENDING:

By completion of this seminar, participants will understand how to improve the review process within CaseWare and to deal with complicated reporting issues including segmented reporting, Local Government Data Entry (LGDE) reports, Statistics Canada reports, and automating reporting when there is non-financial data that needs to be reported.

SPECIFIC TOPICS TO BE COVERED:

- Review automation features (Diagnostics, Issues, Milestones & Annotation)
- Consolidations / Segmented Reporting
- Advanced mapping/grouping
- Automating non-financial values
- Report creation considerations (create your own vs. CaseWare's templates)
- Automating hard to calculate values

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 is 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 automating 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 29, 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/casewareskills.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.