

SDS Touch Base Tuesday Agenda

April 27, 2021

Presenter: Kim w/ Guest Sherri

1. Enhancements and News:

- ✓ Security entry views enhancement: Ability to control Check Reconciliation Groups
- ✓ SDS Web Office Settings: Purchasing – Confirmation email attachment File Name Option
- ✓ Reports Added/Updated
 - i. Check Reconciliation Report:
 - 1. Cash Accounts printed in order
 - ii. Payroll Processing | State/Federal Reporting:
 - 1. District Information: District Name/ Legal Name
 - a. 941, 1099 forms and Indiana and Michigan state reporting
 - iii. General Accounting Reports | Employee Master and Attendance:
 - 1. Employee Attendance w/Sub Information
 - a. Lists employee, absences, and who subbed for him/her and total hours
 - 2. Contract Retroactive Pay Report:
 - a. Updated title and added description
 - 3. Employee Open Contract Report-Distribution Report:
 - a. Added the step and lane fields (show/hide option) to print after the description of the contract
 - 4. Employee Document List:
 - a. Lists all employees who have a document attached to master record
 - b. Does NOT print the document, lists description and original file name
 - iv. General Accounting Reports | Vendor and Order For:
 - 1. Vendor Document List
 - a. Lists all vendors who have a document attached to master record
 - b. Does NOT print the document, lists description and original file name

2. Trending Topics:

- ✓ Employee Master: How to enter/update an Employee Certificate
- ✓ What is needed to prepare, when using Accounts Payable, Purchase Orders, Attendance or Employee Expense Reimbursement Approval processes?
- ✓ How to Setup Security Groups?
- ✓ State of Illinois: SDS Gemini Roll Out - a review of what's coming

3. Looking forward:

- ✓ **May 6, 2021** - TRS Gemini Client Webinar - [Click Here to Register](#)

- ✓ **Annual Conferences (REGISTER TODAY, EVENT PACKAGE SAVE 20%)**
 - June 3rd – Kick Off Conference
 - September 9th – Joint Annual Conference – Day One (Includes All States)
 - September 10th – State Specific Annual Conference – Day Two (Time slots for each state to cover state reporting)
 - October 7th – SDS Reporting Conference
 - November 18th – Masterclass
 - REGISTER = [Click Here to Register Today](#)

- ✓ **Sales**
 - May 19 - 21, 2021 - 68th Annual Colorado ASBO, Westminster, CO – In person
 - June 9 - 11, 2021 - 70th Annual Illinois ASBO conference Schaumburg, IL – In person
 - November 19-21, 2021 - IASB-IASA-IASBO Joint Annual Conference Chicago, IL