

SDS Touch Base Tuesday Agenda

August 28, 2018

Presenter: Kim

1. Trending Topics:

- ✓ When using the Top Menu view, how to see the “Current Finance Month”
- ✓ Registering for courses and conferences
- ✓ How to mass assign accounts to users in the Security – Data Access Control section

2. Enhancements:

- ✓ Security Request & Approve assign Requesters by Location

3. Looking forward:

- Next Touch Base Tuesday will be **September 11, 2018**
Click here to register: <http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/>
- **Crystal Report Training + Two Online Courses** (Financial Reporting and How to Opt Payroll and Customizable Reports) Included with purchase.
 - September 19th from 9:00 – 12:00 CT

Click here to register today: <http://schooloffice.com/sdsservices/sdsreporttraining/>

- **Online Courses**
 - These self paced courses are great to learn or refresh yourself before the year begins on an area of the SDS system. Also, if you are new to the system these courses are perfect for you. If you register for five or more, you will receive a 10% discount. You can get with other users at your school to register for a group of courses today.
 - **Course offerings:**
 - Payroll Timeclock and E-Timesheets
 - Deduction / Benefit Setup
 - Employee Portal
 - Human Resource Center
 - Security
 - Financial Reporting
 - General Accounting Reports
 - Check Reconciliation
 - Accounts Receivable
 - Tips and Tricks (How to help with processing in the Finance area)

- How to Optimize Payroll and How to Use Custom Payroll Reports
- ACA Reporting
- W-2 Reporting
- 1099 Reporting
- Purchase Order Security Setup and Processing
- Employee Portal Processing (From the Employees View)
- Green Accounting
- Look & Browse
- Salary Schedule
- Budget Planning Assistant
- Using the Question and Answer Report Option
- Using "Budget Master" - 5 Areas
- Reoccurring Entry for A/P, Cash Receipts, Transactions + Associated Reports
- Administrative Utilities (Security excluded)
- Fixed Assets
- Accounts Payable
- Awarding of Days
- *Payroll Accrual
- *Fiscal Year Close

Click here to register: <http://schooloffice.com/sdsservices/sds-online-continuing-ed-courses-registration/>

- **Annual User Conference**
 - 09/06/18 - Residence Inn (DIA – Airport) 16490 East 40th Circle Aurora, CO 80011
 - 09/13/18 - Hyatt House Chicago/Oak Brook 210 W 22nd Street Oak Brook, IL 60523
 - 09/20/18 - I-Hotel & Conference Center 1900 South First Street Champaign, IL 61820
 - 09/20/18 - North Conejos Re 1- 17890 US 285 La Jara, CO 81140
 - 09/26/18 - Otsego Club & Resort 696 M-32 East Gaylord, MI 49734
 - 09/27/18 - Wexford-Missaukee ISD 9907 E. 13th Street Cadillac, MI 49601
 - 10/04/18 - LIVE WEBINAR ANNUAL CONFERENCE - 9:00 - 3:00PM

Click here to register: <http://schooloffice.com/2018-sds-user-conference-registration/>