

## SDS Touch Base Tuesday Agenda

September 10, 2019

Presenter: Carla

### 1. Trending Topics:

- ✓ Adding New Account Codes
- ✓ State Codes (Fund, Function, Object)
- ✓ State Budget Form – Account Structure and the State Budget Form
- ✓ Resources Online: Password gods

### 2. Enhancements and News:

- ✓ Employee Count on Direct Deposit Report
- ✓ Emergency Contact Report
- ✓ Look and Browse-Detail Filter Option

### 3. Looking forward:

- ✓ **What's Coming – Stay Tuned to your Inbox:**
  - \*Use Coupon Code **FRIENDS10** for attending today to receive 10% off.
  - **FREE LIVE WEBINARS**
    - **New User Boot Camps –October 10, 2019 (9-12 CST) (Skipping September due to Annual Conferences)**  
Click the following to register: <https://schooloffice.com/newuserbootcamp/>
    - **Next Touch Base Tuesday will be September 24, 2019**  
**Click here to register:** <http://schooloffice.com/sdsservices/sds-free-monthly-user-touch-base-tuesdays/>
  - **ANNUAL EVENTS + SERVICES**
    - **SDS Annual User Conference Registration & Event Bundles**  
<https://www.sdsuniversity.com/courses/category/Events>
    - **Masterclass for Users that want the next level of training**  
<https://www.sdsuniversity.com/p/masterclass>
    - **New Online Courses & Course Bundles per Job Role**  
<https://www.sdsuniversity.com/>

## [SDS ANNUAL USER CONFERENCE \(WEBINAR\)](#)

- **LOCATIONS + DATES + TIMES (9:00 – 3:00) + DETAILS:**
  - Webinar
    - Online – September 27<sup>th</sup> – [Click here for event specific details](#)
- **WHO:** Any SDS user that would like to learn and connect with the SDS community.
- **TRAINERS:** SDS Expert Trainers
- **GET:**
  - Conference Manual, Live Q & A and Conference Recording (To watch at your own pace – Start, pause, replay at your own speed)
- **AGENDA:**

Below is a brief high level overview of what we will be covering.

  - Navigating the brand NEW SDS Website
  - Services
  - Menu Selections
  - Approval Process
  - GASB 84
  - Green Accounting
  - Accounts Payable
  - State Specific Reports
  - Customizable Reports
  - Financial Month and Auditor Control
  - Re-Classification
  - Teachers Retirement System (IL)
  - Control Center
  - Tips and Tricks
  - 2020 Enhancements - TRS
- **COST:**
  - Webinar Conference = \$269/person – **(Full day webinar, manual, recording and SDS completion certificate) – No Travel Costs**
  - \*[Event's bundles](#) (Annual Conference and Masterclass)
- **REGISTER:** Check out all our events and [event bundles](#) by visiting <https://www.sdsuniversity.com/>

## MASTERCLASS

- **DATE + TIME:** November 21<sup>st</sup> – 9:00 – 3:00 CT
- **LOCATION:** 200 E. Randolph Suite #5100 Chicago, IL 60601
- **WHO:**
  - Masterclass is for SDS users that have been using the system and would like to take their SDS knowledge to the next level. If you want to take your SDS knowledge beyond basic training and increase your job efficiency, then keep reading.
  - This class will be a small group of SDS power users. There are limited seats. This environment provides you with the opportunity to connect with other SDS users face-to-face.
  - Included in the day will be a continental breakfast to start our day, a group lunch to allow more time to connect, and an award ceremony to complete our Masterclass.
  - The date of this course is Thursday, November 21, which is the day before the Illinois School Board Officials Conference and the Chicago Magnificent Mile Light Festival. This is a perfect time to attend our Master Class and the School Board Conference and bring family and friends to enjoy the Light Festival. Join us for a fun weekend in the Windy City. <https://www.themagnificentmile.com/lights-festival/>
- **TRAINERS:** You will be trained by two expert SDS trainers and the **Founder & Head Programmer of SDS Terry Litz!** He will be making a guest appearance to show you amazing features in the system and to come by to say hello!
- **GET:** Masterclass Manual, Continental Breakfast, Goodies, Sit Down Group Lunch (Time to really get to know each other) and Completion Award. Trained by two expert trainers and founder of SDS.
- **AGENDA:**

Below is a brief overview of what we will be covering in Masterclass.

### Financial Report Design

- Storing Reports with Changes
- Using Report Examples
- Designing Special Columns
- Charting Values
- Creating Report Groups
- How to Control Report Totals

### Payroll

- Mass Change
- Fringe Benefit Distribution
- Insurance Benefit Distribution Without a Payroll
- Expense Reimbursements



#### Emailing Features

- Purchasing
- Direct deposit
- Using message center

#### Purchase Orders

- Approval Process – Special Features
- Purchasing Catalog Option

#### Green Accounting

- Ways to Upload Documents
  - What and How Can Documents be Loaded
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- **COST:**
    - \$599 – Masterclass Manual, Continental Breakfast, Goodies, Sit Down Group Lunch (Time to really get to know each other) and Completion Award. Trained by two expert trainers and **founder of SDS**.
    - [\\*Event's bundles](#) (Includes Annual Conference and Masterclass)
  - **REGISTER:** Check out all our events and [event bundles](#) by visiting <https://www.sdsuniversity.com/>