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Register for the Next TWO FREE User Webinars!

All Webinars start at 9 AM Central Time

- 08/25/2016– Part 1: Contracts Updated – The Easy & Efficient Way
- 09/01/2016– Part 2: Update Deductions & Benefits– The Easy & Efficient Way

Simply click the link below to Register.

<http://schooloffice.com/sdsservices/sdsfreeuserwebinars/>

Easily Add New Employees to Look & Browse

Adding new employees to the Look & Browse, Employee Portal is easy! Simply run the SDS process to add them anytime you have a new employee. Only new employees will be added.

For more information, please see the section on Mass Create Look and Browse, Employee Portal Users in the link below:

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=application_access

After your Look & Browse / Employee Portal Users have been created, please see the instructions below for steps to print the information letter for your New Users.

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=employee_look_and_browse_letter



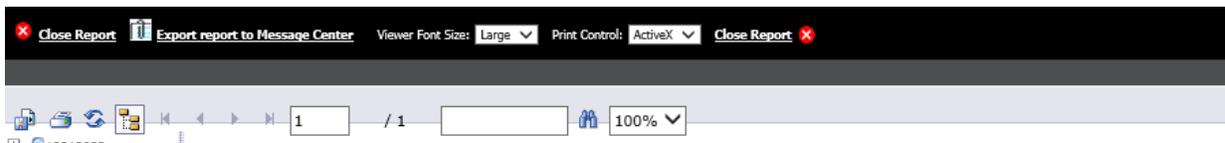
Taking a Step Forward with Checks and PO's



You're at the beginning of a new fiscal year, you're using a great system, and you want to take a step forward with using tools in SDS. What could you begin to do NOW that would add value to your data within the system?

Allow the SDS Web Office System to store the images of your checks and purchase orders with a simple added step to your Check and Purchase Order Printing Process.

When you have your Accounts Payable Checks or Purchase Orders displayed on the screen, print the forms as you would normally do with your processing steps. The previewed forms will then still be displayed on the screen. Select "Export Report to Message Center" at the top of the screen.



A new screen will display with fields that look similar to an email setup. Select "Send Now". After receiving a message that "Your report has been sent to the message center", make the checks and the purchase orders permanent.



Upon selection of the vendor or account, that a check or purchase order has been issued to, the PO Number and/or Check Number will be underlined. Click on that "link" and the image of the check or purchase order will be displayed.

Now that you will be a pro at this procedure, your next step going forward you may want to start adding/storing the invoice images to make your online data circle complete. For more information on Green Accounting (storing your invoice images within the system, exporting reports to message center, and using Look and Browse to see stored images), check out the link below from our help center:

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=green_accounting&SearchHighlight=green_accounting

New: Import Purchase Order Requests

Does your staff give you spreadsheets with their order requests? Do you attach them as a document, only to want to see them on the actual PO form?

There is a new P.O. import process available to easily import the XLSX file directly into the request. You can still attach any document needed, once the import process has been completed.

For more information on importing Purchase Order requests, select the below link:

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=import_purchase_orders

Two Ways to Update Contracts for New Year 2017

It's that time of year, once again, to input Teacher Contracts. SDS has two easy ways for you to accomplish this task.

First Option

Cloning Contracts

You may clone the previous years' contract. This process is simple. The only rule is that you **do not** have a Payroll open at the time of cloning.

1. Select Payroll Processing or Human Resources.
2. Select Employee, Contracts, Deductions/Benefits, etc.
3. Entry Views: Select Contracts (All fields).
4. Select the Employee.
5. Check this box Retain Values on Add
6. Select Add a Record
7. Adjust the information for the new contract
8. Make sure you enter the Fiscal Year for the new contract (e.g. 2017)
9. Select to save.

Second Option

Creating Contracts from Salary Schedule

If you use the salary schedule within SDS, there is an option to create contracts from Salary Schedule

1. After setting up the new Salary Schedule, select the option to Create Employee Contracts.



2. Make sure the correct salary schedule is being used at the top of the screen.
3. Select "Copy the Employee Contracts From" and make sure the correct Contract group is displayed. The number of active contracts for this contract group will be displayed.
4. Select if the employees in this group will move down a step. Select the contract start date on the calendar and the contract end date on the calendar.
5. Select the number of payments.
6. Enter the correct fiscal year for the new contracts that will be created.
7. Select the button to create new contracts. At this time the system will assign a control number to the new contracts. This number can be used if the contracts as a group need to be deleted.

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Peach Crisp

Ingredients:

- 6 Peaches, peeled, pitted, sliced
- ½ tsp almond extract
- 1 cup all-purpose flour
- 1 cup white sugar
- ¼ cup brown sugar
- ½ tsp ground cinnamon
- ¼ tsp salt
- ½ cup butter



Directions:

1. Preheat oven to 375 degrees and grease an 8" square baking dish.
2. Place peaches in bottom of dish and sprinkle with almond extract.
3. In a bowl, combine the flour, sugar, brown sugar, cinnamon, and salt. Cut the butter into the flour mixture with a pastry cutter until the mixture resembles crumbs
4. Sprinkle the flour mixture in an even layer over the top of the peaches, and bake in the preheated oven for about 45 minutes, until the peaches are bubbling and the topping is browned.

Courtesy of AllRecipes.com



Setup the Employee Portal for More Effective Communication

In SDS Web Financial Office you have an area of the system called Employee Portal, where you can send Payroll Vouchers and W2's to the employees, among other amazing features to effectively communicate with your staff.

Many of you have already setup the Employee Portal and are taking advantage of what it has to offer. However, there are some features that you may not be aware of. Please review the documentation in the link below to learn how to setup the Employee Portal in your system if you haven't already and how it can help you manage information flowing from the business office to the staff and back to the business office.

Click below to access the instructions:

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=employee_portal

Awarding New Days to Employees for Sick Leave, Personal Leave, and Vacation Days

Awarding days is easy with the Human Resource Control Center. Days may be added to all employees or in groups set up in the Employee Demographics area. You are able to rollover days from different categories, for example Personal days to Sick days. When the option is used to setup the groups these groups can also be used to award new days or hours on a per payroll basis or yearly basis.

Human Resource Control Center

Processing Options

- Data selection definition
- Award Attendance Days
 - Sick Days
 - Personal Leave
 - Vacation
 - Other Reason_1
 - Other Reason_2
 - Other Reason_3
 - Other Reason_4
 - Other Reason_5
 - Other Reason_6
 - Other Reason_7

Apply Sick Days Policy or Manually Adjust

Award Area:	Value to Award	Transfer Available To	Clear/Zero Value	Roll Next to Current	Display All Selection Formula
<input type="radio"/> Next Year <input checked="" type="radio"/> Current	5 +	Select Award to Area	Clear Awards	<input type="checkbox"/>	<input type="checkbox"/>

Employee Number	Employee Name	Award Next YR	RolFrnd	Awarded	Prior to Current	Current	Available
1192	Ackerman, Dawn	0	10	5	0	0	15
1212	Adamson, Glenn	0	15	5	0	0	20
1190	Adamson, Phyllis	0	12	5	0	0	17
1002	Baker, Mary F.	0	10	5	0	0	15
1197	Bassnett, Shawn R.	0	7	5	0	0	12
1166	Braaten, Leeanne	0	7	5	0	0	12
1208	Campbell, Katherin M.	0	0	5	0	0	5
1008	Cardenas, Emma R.	0	0	5	0	0	5
1134	Carman, Jelyne C.	0	0	5	0	0	5
1009	Caranza, Ronalds M.	0	0	5	0	0	5

See the link below for more information on awarding days:

http://help.schooloffice.com/helpconsole/SDSFinanceHelp/default.aspx?pageid=awarding_new_days_to_employees_for_sick_leave_personal_leave_and_vacation_days

