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Fiscal Year Processing Online Course

Don't miss out...sign up today!

WHO SHOULD TAKE THIS COURSE?

Any SDS user that is new or has worked in SDS for years that is in charge of the Fiscal Year Processing.

WHEN WILL THIS COURSE TAKE PLACE?

July 13th from 9:00–10:30 CT or you can purchase the online **video and manual** to view at anytime.

WHAT COMES WITH THE TRAINING?

You will receive full documentation that goes specifically with the course and is not available anywhere else and a video of it too.

LOCATION?

Online. You will receive the connection information and documentation for the course the day before the training, unless you choose to purchase the video + manual option. This you receive right away.

WHAT DOES THE SYLLABUS LOOK LIKE?

This Fiscal Year Processing Course involves both the Financial and Payroll systems. A new fiscal year is an extension of the prior fiscal year, and the SDS system streamlines this transition. The fiscal year change-over occurs with specific steps that need to be completed during the June payroll and financial processing with additional considerations and completion steps for July. [CLICK HERE TO VIEW THE SYLLABUS](#). It walks you through the progressive steps for a successful completion of the Fiscal Year Processing. You will receive full documentation that will step you through this course. At the end of the course there will be time for Q & A.

COST?

\$89/Person

REGISTER?

Click below to register:

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

Colorado Financial Data Pipeline Report

Yes, it is almost that time of year again to start working on the transmission to CDE for your financial records.

Once CDE has the pipeline process opened and you have moved the finance month from June 2017 to July 2017 you will be ready to start the transmission process. Please review the link below for information on the process to send your financial records to CDE through the data pipeline.

<http://help.schooloffice.com/financehelp/#!/Documents/processingthecoloradocdedataexchangethecoloradofinancedatapipeli.htm>



New School Year = Better Communication

Is your Employee Portal setup?

The Employee Portal allows your employees to request days off, update key personal information, receive Payroll Vouchers and W2's, update ACA Dependent information and much more.

If you have already set up the Employee Portal, there are some new features you may want to check out for an even better communication flow. If you haven't already set the Employee Portal, check out the link below for more information.

<http://help.schooloffice.com/financehelp/#!/Documents/settingupsecurityfortheemployeeportal.htm>

Name	Login	Security Group
ANDERSON, ALEAHA G.	974	_Request
MOERGEN, LOIS	aburk	
SURMAN, ROXANN	andersond	

New Login Screen

The new login screen options allows for new choices in how your menu and screen will display. To access the new login screen, the URL used to access the SDS system needs a small change. Simply add to the end of your URL is **login.aspx**.

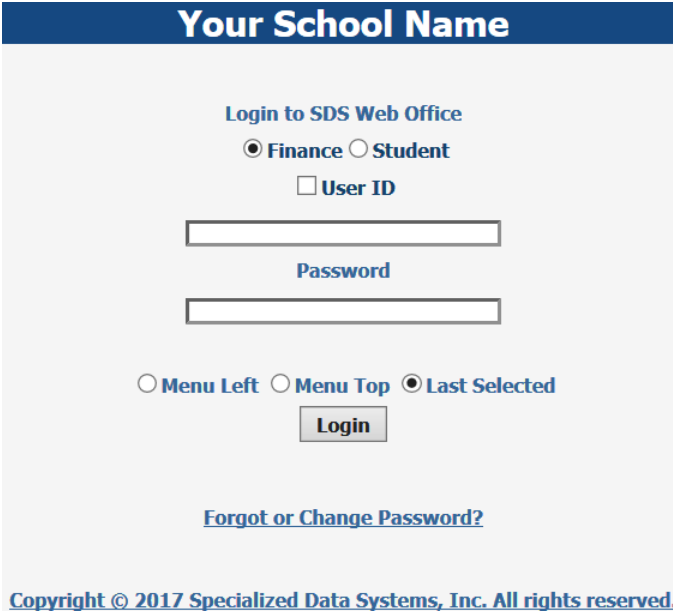
Your current URL will look like this.

<https://ssl12./sdsschooloffice.com/schoolname/sdsweboffice>

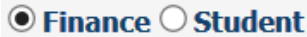
Add **/login.aspx** to the end of your URL.

<https://ssl12.schooloffice.com/schooloffice/sdsweboffice/login.aspx>

Your login screen will have a new look.



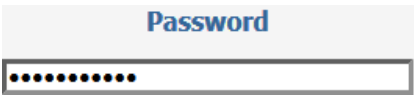
When you login to the new menu option, select either the Finance or Student program to login to.



This new view allows you the option of saving your User ID. To save your User ID, select the checkbox. Then enter your User ID.



Enter Your Password



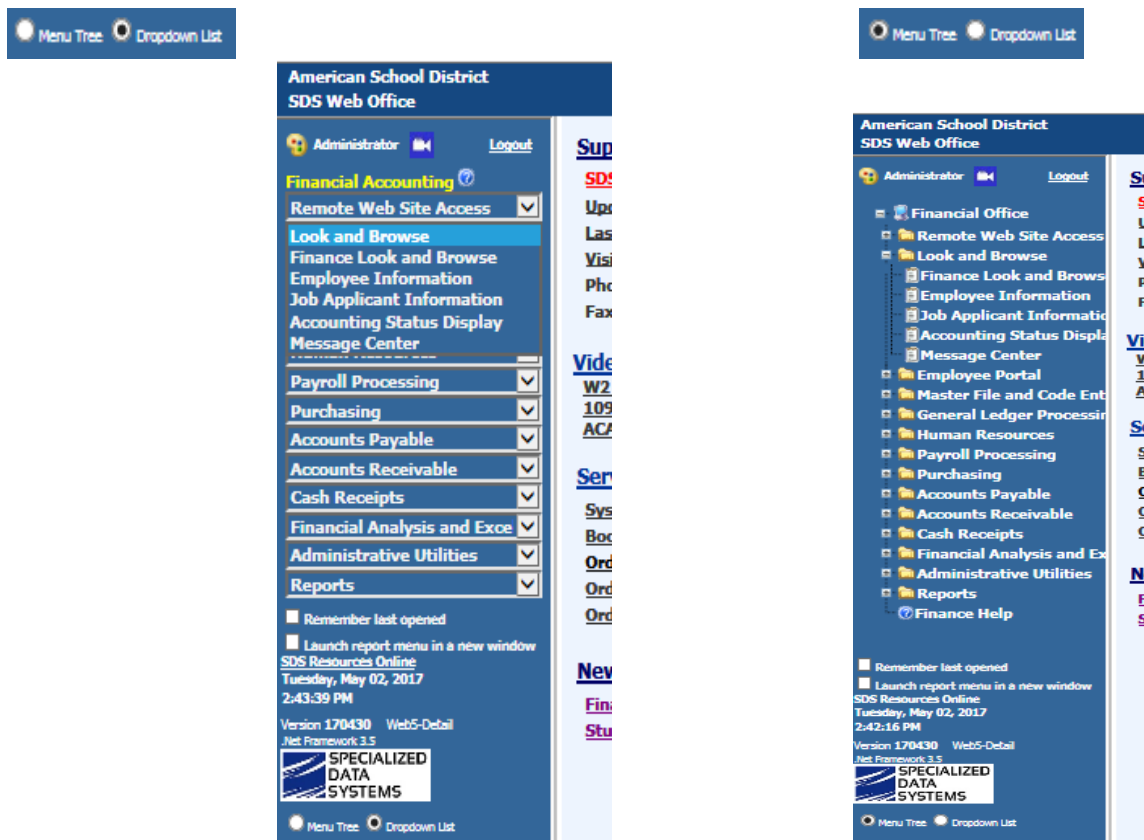
New Login Screen (cont'd)

Select the how you would like to view your menu

Menu Left Menu Top Last Selected

Menu Left

Menu Left will display your menu on the left side of your screen with two display choices located at the bottom of the screen, Menu Tree or Dropdown List.

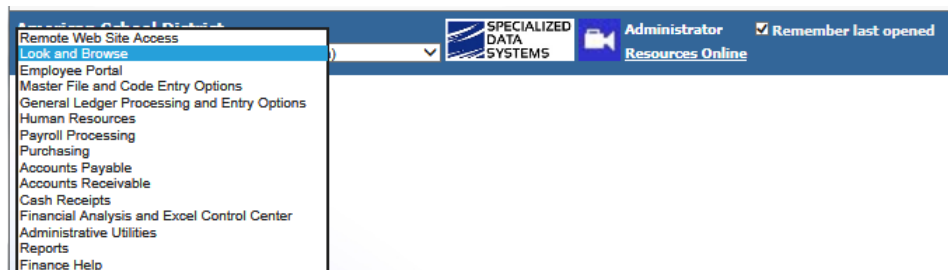


Menu Top

Menu Top will display your menu at the top of your screen. This view allows your working area to be larger by moving the menu from the left to the top.



Select from the first drop down the program you would like to work in.



New Menu Screen (Page Cont'd)

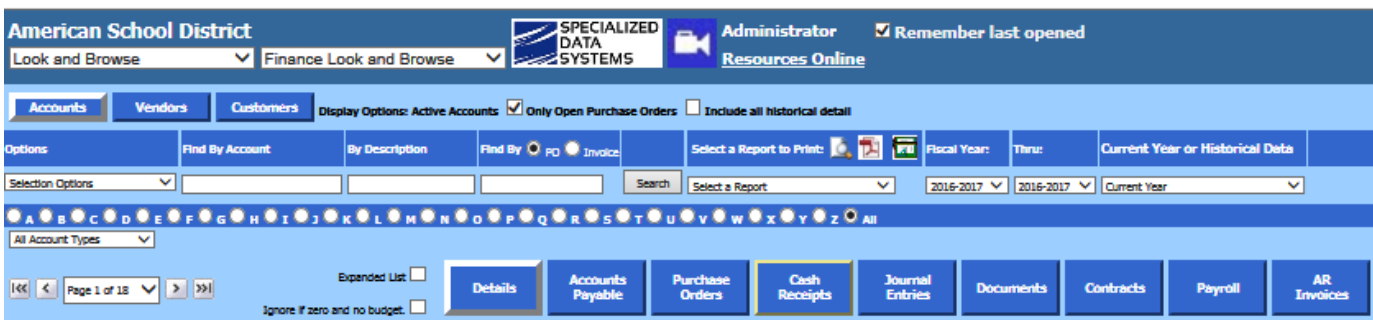
Select from the second drop down the program area you would like to work in.



Remember last opened



Select last opened, the program will remember what area of the program you were last in and log you back into that area. Simply continue where you left off.



The system will remember your last selection for 8 hours.

The memory is specific to the user. If multiple users access the same workstation during the day, each will be remembered for what they each individually selected.

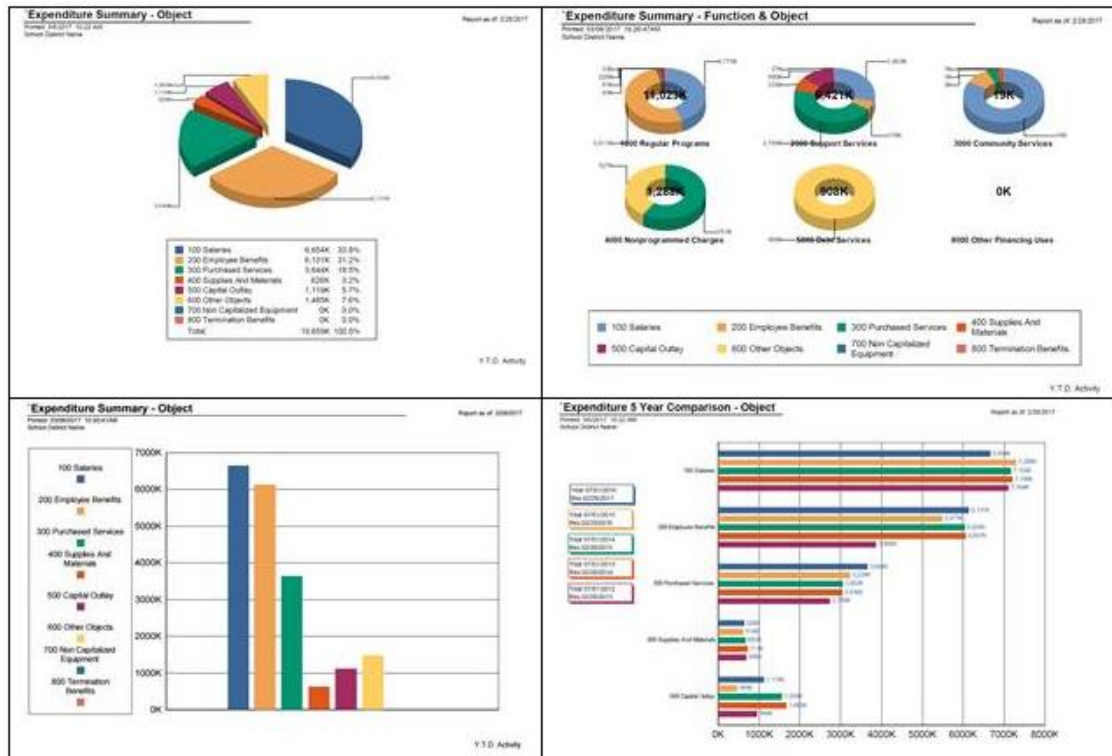
The program will return the user to their last menu selection. If a specific employee, account, or report is selected, that will not be retained. This helps you get back to what you were doing without the need of navigating the menu.

NOTE: Having schooloffice.com in the IE compatibility view list will interfere with some aspects of the new menu. Please check your IE compatibility view list, and remove schooloffice.com if applicable. You may have added schooloffice.com to your list for the ability to search in the Help Console. With the new Help Console in place, having schooloffice.com in the IE compatibility view list is no longer necessary.


Visualize Your Data with Simple Charting

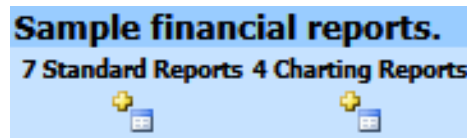
An Impressive yet Simple way to Present Your Information

Simple Charting is now part of your Financial Report Design Area. You can now graphically represent your districts financial information as part of your regular financial reports. The ability to add the charts is simple. The ability to visualize your financial position is far from simple.



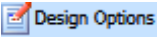
To run a financial report with charting follow the steps below:

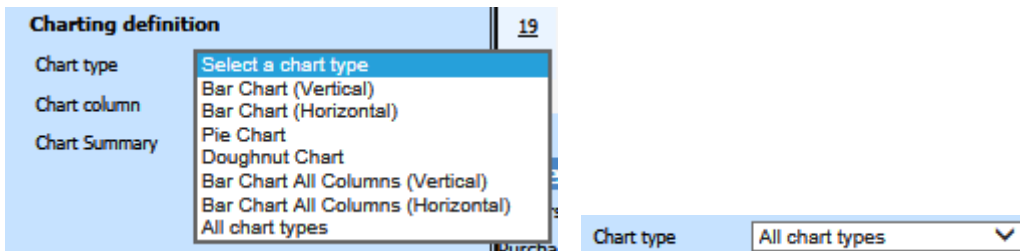
- Open Reports | Financial Reports.
- We have in place sample reports or select any report of your choosing.
- Activate the customization Design Option  Design Options at the top of the display.
- To activate the sample Charting Reports, select the button to load the sample reports, located at the bottom of the financial report design screen.



Visualize Your Data with Simple Charting

An Impressive yet Simple way to Present Your Information (cont'd)

- The title of the sample charting reports start with an accent mark
 - Example: 'Expenditure Summary – Object & Program
- Follow these steps and you will have a new way to visualize your districts financial information.
- Select a financial report
 - 'Expenditure Summary – Object & Program
- Activate the customization Design Option (if not already activated). 
- Select the type of chart you would like to review.

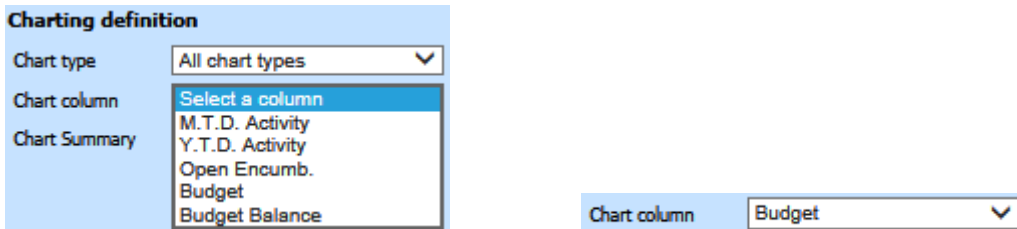


Charting definition 19

Chart type: Select a chart type
 Bar Chart (Vertical)
 Bar Chart (Horizontal)
 Pie Chart
 Doughnut Chart
 Bar Chart All Columns (Vertical)
 Bar Chart All Columns (Horizontal)
 All chart types

Chart type: All chart types

- Select the column on the report you would like to chart.



Charting definition

Chart type: All chart types

Chart column: Select a column
 M.T.D. Activity
 Y.T.D. Activity
 Open Encumb.
 Budget
 Budget Balance

Chart column: Budget

- Select your chart summary.



Charting definition

Chart type: All chart types

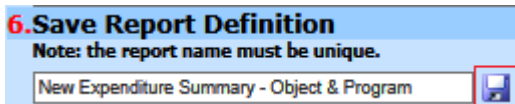
Chart column: Budget

Chart Summary: Object - (Expense)
 Object - (Expense) & Program

Chart Summary: Object - (Expense) & Pro

Note: Column and Summary options will vary with reports.

- Preview your report.
- You may save any sample report you like, under Save Report Definition, adjust the report name and save. Now the report is yours and will not be overwritten.



6. Save Report Definition

Note: the report name must be unique.

New Expenditure Summary - Object & Program

Note: Other sample reports start with an underscore; check them out!

Budget Additions and Changes

With one fiscal year quickly coming to an end and another begins, you may have a need to add new accounts, edit existing accounts, add new funds, and add new account dimensions for the new fiscal year.

Editing an Account

To edit an existing account number, access the account in the Budget Master, make the needed changes to the account dimensions and/or account description and save the entry. Any changes made to any of the dimension fields will automatically update the State Account Number when the record is saved.

Adding a new Account

When adding a new account, if the account uses a code that does not appear in the dropdown menu in the Budget Master, the new account dimension will need to be added first, then the account can be added. For more information on adding a new account dimension and/or adding a new account, see the links below for "Add an Account" and "State Codes".

Adding a new Fund

If a new fund needs to be added for the new fiscal year, the new fund code and any new account dimension codes will need to be added first, before adding the new fund accounts into the Budget Master. In addition to adding these new accounts, a ledger interface record will also need to be added for this new fund to designate the accounts that will be used during the auto-posting processes. For more information on adding a new fund code, adding new accounts, and adding a ledger interface record for this new fund, please see each of the 3 links below for instruction.

Add an account

<http://help.schooloffice.com/financehelp/#!/Documents/budgetmasterbasicfields.htm>

State Codes

<http://help.schooloffice.com/financehelp/#!/Documents/statecodesfundfunctionobject.htm>

Ledger Interface

<http://help.schooloffice.com/financehelp/#!/Documents/ledgerinterface.htm>

