



Dynamic Software for Your School

2017 User Conference Agenda

Specialized Data Systems, Inc.

Below is a brief overview of the SDS 2017 User Conference agenda. The conference is one day and takes place from 9:00 – 4:00. There will be a continental breakfast, lunch brought in for a working lunch and afternoon snacks. You will receive the slides of the conference, a manual of everything covered in the conference and SDS goodies to bring home.

We hope to see you at the user conference this year. We enjoy training you and getting the day to connect with each of you! Check out the agenda below and if you are interested in registering please visit <http://schooloffice.com/2017-sds-user-conference-registration/>

Session 1: 9:00 – 10:20

New Login Screen

Reports

Financial Reports

- Report Groups
 - Date Range Reporting
 - Date Range & Date Option
- Charting Reports
- Exporting reports to Excel

Q & A Reporting

Session 2: 10:40 – 12:00

Human Resources

Human Resources Control Center

- Awarding Attendance Days
- Employee YTD Adjustments
- Employee Distribution Adjustment
- Deductions & Benefits
- Employee Information Screen (New)

Payroll Processing

Customizable Reports



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State Reporting

The state reporting listed below will be covered only in the specific state user conference. All states will not be covered in each conference.

Colorado

- CDE HR reporting

Illinois

- EIS, TRS Annual Report

Michigan

- ORS Reporting

Wisconsin

- SAFR Report
- Annual Retirement Report



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Session 3: 1:00 – 2:20

General Ledger and Processing

Ledger Transaction Entry

- How to enter in a Cross Fund Entry
- How to enter in a Prior Year Entry

Check Reconciliation

- How to use Positive Pay
- How to post ledger transactions to check rec
- Import Cleared Checks

Voiding AP/Payroll Checks

- What happens when using the Void, Un-Void, Re-issue

Session 4: 2:40 – 4:00

Quick Tricks & Tips

This section will walk you through how to make the system work best for you.

Employee Portal

- Employee can preview demographics and request changes

Look & Browse

- Exporting Report to Message Center
- Preview AP checks, invoices

Accounts Payable

- Accounts Payable Distribution Adjustments

Finance Month & Auditor Control Options

- Move AP, JE, CR to a different Month
- Unlock a Journal Entry