



**MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
TECHNOLOGY WORKSHOP
Polson – Kwa TaqNuk
Friday, November 16, 2018**

Room 1 – CHARLO ROOM

- 8:30 a.m. – 9:30 a.m. **Working with Excel Spreadsheets**
Denise Williams, MASBO
Focus will be on skills needed for the OPI-GEMS presentation
- 9:30 a.m. – 10:30 a.m. **Technology Tips**
Denise Williams, MASBO
Open discussion about best practices using technology and managing technology budgets
- 10:30 a.m. – Noon **OPI-GEMS Data Warehouse**
Brett Carter, Office of Public Instruction
What's in GEMS, and how to get it and use it

Noon – 1:30 p.m. Lunch on your own

Room 2 – MICHEL/VICTOR ROOM

- 8:30 a.m. – 12:30 p.m. **Tyler Technology User Group Training**

12:30 p.m. – 1:30 p.m. Lunch on your own

Room 2 – ALEXANDER ROOM

- 8:30 a.m. – 12:30 p.m. **Black Mountain Software User Group Training**
- 12:30 p.m. – 1:30 p.m. Lunch on your own**
- 1:30 p.m. – 2:30 p.m. **CyberSecurity**
TBD
- 2:30 p.m. – 4:00 p.m. **Google Forms and Google Q&A**
Mark Wilson, West Valley Schools
How to use Google Forms and open Q&A of how to function in the Google environment. Cindy Foley will share her way of managing electronic board packets.

Tyler Technologies User Group Training Agenda:

8:30 - Enhancements

- last 4 quarters of enhancements

8:55 - Dashboards

- Glimpse of the Future

9: 10 Provisional Database

- Refresh Databases

9:20 Break

9:25 - Imports from Excel

- Journal Entry Imports
- Requisition Import
- Invoice Import (both)
- Vendor Import
- Deposit Import
- Bank Statement Import
- Budget Import
 - New Accounts
- Position/Supplemental Import
 - Basic
 - Advanced
- Employee Year to Date Adjustments
- Employee Deduction Import (to change the amounts, percent or maximum}
- Employee Leave plan Import
- Fast Leave Entry
- Deduction and Benefit (Import deduction Line information)
- Email Import and Export jobs -

10:55 - Break

11:10 - AP Direct Deposit

- ACH file setting
 - Saving a template
 - Adding template to the P&P Default settings

11:30 - Cool Places

- Transaction Inquiry
 - Journal Detail
 - Account Detail
- Employee Funding Detail (Activate and Inactivate deduction and leave funding in mass)
- PR Expense Detail by Account Sherry
- PR Employee Journal

12:00 - Calendar Year End

- 1099 Processing
 - 1099 Edit Report
 - Import 1099 file (i.e. Student Activities database)
- W2 Processing
 - Payroll journal
 - Quarterly Accumulation
 - 941 form (What was paid to IRS) need to all match