



**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**
(see detailed agenda on next page)
- 12:30 p.m. – 1:30 p.m. Lunch on your own**

Room 3 – ALEXANDER ROOM

- 8:30 a.m. – 12:30 p.m. **Black Mountain Software User Group Training**
1. ESSA Reporting
 2. User Reports
 3. Importance of Project Report Codes
 4. Researching information in Accounting and Payroll
 5. Compensated Expenditure and Terms of Employment Reporting
 6. Preparing W2s and 1099s
- 12:30 p.m. – 1:30 p.m. Lunch on your own**
- 1:30 p.m. – 2:30 p.m. **CyberSecurity**
- 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