



2020 Report Training Conference Agenda

GENERAL ACCOUNTING REPORTS

Getting Started

- Selecting a Report
- Activate Sort Definition Area
- Report Parameters
- Export a Report
- Name and Save a Sort
- Share a Sort
- Delete a Sort

View and Export

- Creating a Quick View
- Activate Sort Definition Area
- Export a Report
- Name and Save your Sort
- Share a Sort
- Delete a Sort

FINANCIAL ACCOUNTING REPORTS

Screen Overview

Financial Report Overview

Financial Report Settings

- Report Formats
- Account Type to Include
- Activity Date Settings
- Report Columns
- Subtotal Definition

Financial Reports Design Option

- Activity Date Settings – Dates Used to Tabulate Report Values
- Report Columns – Other Column Considerations

Finance Report Groups

Date Range Reporting

Additional Standard Reports

Charting Reports

Exporting Reports to Excel

HOW TO OPTIMIZE PAYROLL AND USE CUSTOMIZABLE PAYROLL REPORTS

How to Change Deduction-Benefit Descriptions and/or Deduction-Benefit Codes

- Send a Copy of Your Database
- Run a Deduction Master List
- Changing Deduction-Benefit Descriptions
- Changing Deduction-Benefit Codes

What Codes?

What Order?

Old Code

New Code

Open Payroll Screen-Naming Payout Category

Gross Pay Entry and Adjustments

- Gross Pay Entry and Adjustment Time Card Entry Screen: Add Pay
- Enter Time Card Information Pulled from Employee Demographics
- Editing the Time Entries
- Eliminate a Time Card
- Who options:
- Automatic Evaluation
- Assigning Overtime Pay

Compute Payroll

- Timing Codes
- Naming the Timing Codes
- Show/Hide Deduction and/or Benefit List
- Evaluate & Show Pre-compute Test
- Special Settings
- Show Payroll Information
- Show Payroll Calculation History

Accessing External Websites from SDS

Customizable Reports

CRYSTAL REPORTING

Getting Started

- Introduction to Report Production
- What is Crystal Reports?
- Reporting Capabilities in SDS
- Standard Reports, Quick/Flash Reporting
- Quick View of a SDS Standard Report
- Steps to creating a Basic Customization
- Steps before Creating a Report
- Becoming Familiar with your SDS Database
- Hints to making Reporting Simple

How to Generate a New SDS Report

- Create a Blank SDS Report
- Customize a SDS Standard Report
- You will learn how to open up a SDS standard report, modify it, save it and run it through SDS.
- How to Customize a Standard SDS Report
 - Employee Master List
 - Checks
 - Purchase Orders
 - Financial Reports Custom Trick
- What to think about before Customizing a Report
- Hands on Exercise

Tools

- In this section you will learn more advanced features to apply to your already created SDS Report.
- Grouping and Section Expert
- Linking
- Formula Creation
- Total/Count Fields
- Parameter Field (How to add Date Ranges to a report)

**Please note this agenda is tentative. We may adjust the agenda slightly if new topics come up to teach or inform you of what's happening at the time of the conference.*