

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## **PERSONNEL TRAINING**

### ***Personnel Module***

*Names/Title/Email/When to Schedule*

Codes/Header Maintenance – 30 minutes  
Employee Maintenance – 30 minutes  
Inquiries/Reports/Charts – 45 minutes

### ***Employee Benefits***

*Names/Title/Email/When to Schedule*

Codes/Benefit Rate Maintenance – 1 hour  
Share Profiles/Share Loads – 30 minutes  
Employee/Dependent Maintenance – 45 minutes  
Longevity – 30 minutes  
Reports – 30 minutes  
Benefits Distribution Module – 1 hour

### ***Salary Lanes/Steps***

*Names/Title/Email/When to Schedule*

Salary Lane/Schedule Code Maintenance – 45 minutes  
Employee Maintenance – 45 minutes  
Salary Lanes/Steps Load – 45 minutes  
Schedules Mass Entry – 15 minutes  
Salary Lanes/Steps Reports – 30 minutes

### ***Registry of Educational Personnel (REP)***

*Names/Title/Email/When to Schedule*

Code Maintenance – 30 minutes  
Employee Maintenance – 30 minutes  
Professional Development Maintenance/Loading – 30 minutes  
Vacant Positions – 15 minutes  
MOECS Processing – 15 minutes  
Mass Changes – 15 minutes  
REP/Power School Comparison – 15 minutes  
Reports/Submission Processing – 45 minutes

### ***Affordable Care Act (ACA)***

*Names/Title/Email/When to Schedule*

Code Setups/Maintenance – 30 minutes  
Employee Maintenance – 30 minutes  
Reports – 30 minutes  
Create SETSEG Download Files – 30 minutes

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## **PERSONNEL TRAINING**

### ***Personnel Attendance Module***

***Names/Title/Email/When to Schedule***

Codes/Policy Maintenance – 1 hour

Balance Entry/Accruals – 30 minutes

Attendance Processing – 1 hour

Substitute Attendance Processing – 30 minutes

Reports/Inquiry – 30 minutes

ESTA Review – 30 minutes

Total Personnel Training Hours: 17.25 hours

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## **PAYROLL TRAINING**

### ***Payroll***

*Names/Title/Email/When to Schedule*

Payroll Overview – 15 minutes  
District Header – 15 minutes  
Code Maintenance & Listings – 15 minutes  
Pay Date Maintenance – 15 minutes  
Check Message & Listings – 15 minutes  
Employee Maintenance – 2 hours  
File Maintenance – Mass Changes – 15 minutes  
New Contract Processing – 30 minutes  
Contract Adjustments – 15 minutes  
Contract/Salary/Rate Changes – 15 minutes  
Payroll Entry – 2 hours  
Payroll Processing – 1 hour 30 minutes  
Payroll Inquiry – 30 minutes  
Payroll Adjustments – Voids/Manuals – 30 minutes  
Payroll Check Replacement – 15 minutes  
Reports – 45 minutes  
Third Party Pay – 15 minutes  
Check Reconciliation – 15 minutes  
Reclassify – 15 minutes  
QTD/YTD Adjustments – 15 minutes  
Payroll Uploads – 15 minutes  
ORS Processing – 1 hour 45 minutes  
Quarter Processing – 15 minutes  
W2 Processing – 15 minutes

Total Payroll Training Hours: 13.5 hours

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## **BUDGET/FINANCE TRAINING**

### ***Purchase Order Module***

*Names/Title/Email/When to Schedule*

Codes/Header Maintenance – 30 minutes  
P.O. Processing – 1 hour  
P.O. Receiver Processing – 30 minutes  
P.O. Inquiry/Listings – 30 minutes  
P.O. Authorization Maintenance – 1 hour

### ***Accounts Payable Module***

*Names/Title/Email/When to Schedule*

Vendor/Bank/Header Maintenance – 30 minutes  
Invoice Processing – 1 hour  
Check Processing – 1 hour  
Void/Replacement Checks/Check Reconciliation – 30 minutes  
Inquiries/Listings/Check Registers – 30 minutes  
1099 File Maintenance/Reports – 30 minutes

### ***Finance Module***

*Names/Title/Email/When to Schedule*

ASN/Dictionary/Header Maintenance – 1 hour  
Journal Processing – 30 minutes  
Month End/Year End Processing – 30 minutes  
Finance Reports – 30 minutes  
ASN/Journal Inquiries – 30 minutes  
Finance Sort/Filter and Charts - 30 minutes  
Financial Information Database (FID) – 3 hours  
– FID setup, inquiry, website submission

### ***Budgeting Module***

*Names/Title/Email/When to Schedule*

Budget Module Review/Setups – 1 hour  
Budgets #/Budget Maintenance – 30 minutes  
Budget Loads – 1 hour  
Budget Inquiry – 30 minutes

### ***Medicaid Outreach***

*Names/Title/Email/When to Schedule*

Loads/Maintenance – 30 minutes  
Listings/Reports – 30 minutes

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## **BUDGET/FINANCE TRAINING**

### ***Accounts Receivable Module***

***Names/Title/Email/When to Schedule***

Codes/ Header Maintenance – 30 minutes

Invoice Processing – 45 minutes

Invoice Print – 30 minutes

Cash Receipts Processing – 45 minutes

Reports/Inquiry – 30 minutes

Total Budget/Finance Training Hours: 20.5 hours

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## ***Food Service Module***

*Names/Title/Email/When to Schedule*

Building/Codes/Header Maintenance – 30 minutes

Daily Tally Processing – 1 hour

Inquiries/Listings/Reports – 30 minutes

Total Food Service Training Hours: 2 hours

## ***Fixed Assets Module***

*Names/Title/Email/When to Schedule*

Codes/Asset Maintenance – 1 hour

Inquiry/Reports – 45 minutes

Work File Processing (Invoice integration for Fixed Assets) – 1 hour

Depreciation – 30 minutes

Total Fixed Assets Training Hours: 3.25 hours

## ***Query/Ad Hoc Reporting***

*Names/Title/Email/When to Schedule*

Basic introduction to Query – 2 to 3 hours

Intermediate Query – 2 to 3 hours

(Using query capability for specific purposes like finance or personnel should be in separate training sessions.)

Total Query/Ad Hoc Training Hours: 4-6 hours

## ***Warehouse/Inventory Control Module***

*Names/Title/Email/When to Schedule*

Codes/Header/Item Maintenance – 1 hour

Requisition Processing / Authorizations – 1 hour

Packing Slip processing – 30 minutes

Inquiry/Reports – 1 hour

Warehouse Receivers – 30 minutes

Warehouse Adjustments – 1 hour

Requisition Receiver – 30 minutes

End of Year Processing – 30 minutes

Total Warehouse/Inventory Control Training Hours: 6 hours

# **SURVEY FOR SYSTEM TRAINING CORE BUSINESS SYSTEMS**

## ***General Systems Menu***

*Names/Title/Email/When to Schedule*

Recreate Form Overlay – 15 minutes  
District User Profile Maintenance – 15 minutes  
User Authorization Maintenance – 15 minutes  
Favorites Setup/Maintenance – 15 minutes  
User Security and Data Transfer Authorization – 30 minutes  
Employee Portal – 15 minutes  
Various commands/reports – 15 minutes  
Spooled file report utilities – 15 minutes  
Data Transfers – 15 minutes

Total General System Training Hours: 2.5 hours

## ***Gen3***

*Names/Title/Email/When to Schedule*

Interface Processing – 15 minutes  
Favorites – 15 minutes  
Core Business System Documentation – 15 minutes  
Reports Utility – 15 minutes

Total Gen3 Training Hours: 1 hour