WASWUG 2011

HR/FINANCE TRACK
SESSION LISTING

SUNDAY

A/R Tips, Tricks and Enhancements
This session will cover commonly asked questions about A/R, as well as new features on the web.
Presenters: Catherine Carpenter
3/6/11
Track: Finance
Tags: Other FM Category

Account Code Clearance Options
This session will give an overview of how account clearance is setup and used throughout the system - from reporting to approvals.
Presenters: Andy Lind
3/6/11
Track: Finance
Tags: Account Management

Assignment Breakdown Screens
Features of the Assignment Breakdown Screens in Salary Negotiations and Employee Management will be explored and explained. We will talk about the functions of the buttons and how to copy account codes to or from the Payroll area. Participate in a group discussion on how districts update these fields most effectively. Come with your questions and share your experiences.
Presenters: Kathy McGough
3/6/11
Track: HR
Tags: Employee Management (EMS/SN, Fast Track)

Data Mining for Payroll/HR
Learn how to create and customize HR and Payroll reports using Data Mining. The presentation will include a demonstration of the tool and an explanation of the data available for reporting. Sample reports will formatting options.
*This session is also offered on Tuesday March 8th.
Presenters: Sally Malan
3/6/11
Track: HR
Tags: Data Mining - HR/Payroll

Employee Access: Implementation Considerations
As a 24-hour resource for employees, Employee Access provides information and tools. This session will help you implement, configure and maintain Employee Access for your employees. Take your district from ACCESS DENIED to "EMPLOYEE" ACCESS GRANTED
Presenters: Janet Dockter
3/6/11
Track: HR
Tags: employee access

Expense Reimbursents Online
In this session you will see a demonstration of how to enter an expense reimbursement in WESPaC online. You will learn how to enter it, where it is in the approval process and a history of past expense reimbursements.
Presenters: Gary Van Hee
3/6/11
Track: Finance
Tags: New FM Category

Fast Track Best Practices: ESD 112's Perspective from Pilot through Production
Learn tips, tricks, and tools for implementing and utilizing the Fast Track electronic application module. ESD 112 will share their experience with Fast Track from their days piloting the module through three years of utilization. Topics of discussion to include: Adapting Fast Track to meet your individual business practices, developing a work plan from implementation through production, and customizing your employment application to strengthen your candidate pool.
Presenters: Melissa Kreuder, Joseph Mathews
3/6/11
Track: HR
Tags: Employee Management (EMS/SN, Fast Track)

Financial Management Budgeting Tips & Tricks
Budgeting Tips & Tricks: This session's focus is on FM Budget Management's Budget Entry process for planning and adopting your budget.
*This session is also offered on Tuesday March 8th.
Presenters: Sean Schaeffer
3/6/11
Track: Finance
Tags: Budget

How to Maintain, Organize and Work with the WESPaC Chart of Accounts
How to maintain, organize, view, change, restrict access or any other questions you may have on the WESPaC Chart of Accounts. A litany of questions and answers for the functionality and power of the Chart of Accounts both in the PaC and Web versions of the WESPaC system.
Presenters: Shirley Kamm
3/6/11

Track: Finance
Tags: Account Management

Importing Fixed Assets into WESPaC
Are you wanting to utilize the Fixed Asset Module within WESPaC, but don't want to have to hand key in all of your exisiting fixed asset data? Come to this workshop and see how the new fixed asset import process works.
Presenters: Amy Weppler, Stewart Mhyre
3/6/11
Track: Finance
Tags: Financial Management

More Account Management Reporting - Using Summary and Detail Reporting - Using Summary and Detail Reporting Options
This overview will cover report modifications and optional settings available in both Summary and Detail Account Management Reporting. Summary report topics covered will include using field settings to auto-generate data, creating multiple year comparisons, ranges, and use of combination fields. Detail report topics will cover the use of Source Parameters Selections.
Presenters: Kathy Timmons
3/6/11
Track: Finance
Tags: Account Managment

Navigating the Budget "Process" Maze
Have you been confused and frustrated by what goes on to "Process" a budget under the "Budget Entry" button in WESPaC? Come hear how Sedro-Woolley has simplified "The Process". This simplified method and way of looking at "The Process" has been tested in other districts with great success.
Presenters: Stewart Mhyre, Steve Lidgard
3/6/11
Track: Finance
Tags: Budget

Now that you have WESPAC, How do you run a faster payroll?
Come and hear how Snohomish SD has changed since we've converted; what we've learned and what we've done to run a faster and accurate payroll!
Presenters: Jessica Torres
3/6/11
Track: HR
Tags: Payroll

Payroll Account Code Adjustments
Did an account code change on an employee that has been paid? WESPaC provides an adjustment area for this purpose. In just a few entries the payroll and benefits can be corrected to the new account or accounts. Do you track time and effort? If so, the is an awesome tool to correct the salaries and benefits as worked, without a JV. It can also keep your month and year to date expenditures current, as worked in the federal funds.

Presenters: Georgeanne Magruder
3/6/11
Track: HR
Tags: Payroll

Recognizing Potential Legal Issues
Provide true learning enjoyment and fulfillment to the Session Attendees while providing a knowledge base of free speech and free press (what can and cannot be said and printed) while recognizing the application of legal standards and restrictions to communication activities (written, oral, and electronic) as it relates to hiring practices from the interview process through termination.
Presenters: Scott Volyn
3/6/11
Track: HR
Tags: legal

Retirement Adjustments in WESPaC
When would retirement adjustments in WESPaC be used and how do the various fields affect the transmittal? Real life errors that may be encountered and how to fix them. How to keep WESPaC and WBET in sync.
Presenters: Mary Halloran
3/6/11
Track: HR
Tags: Retirement

Revenue, Expenditure and Balance Sheet Summary Reporting in WESPaC
This session for beginners will step through the process of building Account Management summary reports in WESPaC.
*This session is also offered on Tuesday March 8th.
Presenters: Tracy Green
3/6/11
Track: Finance
Tags: Account Management

The Top Ten HR Budget Troubleshooting Tips
Learn how to improve your HR budget process and to avoid the commonly reported HR budget issues. Benefit from the lessons of others as the most commonly reported issues and solutions are summarized.
*This session is also offered on Tuesday March 8th.
Presenters: Leslie Strickland
3/6/11
Track: HR
Tags: Budget

Top Ten EMS Tips: Employee Management
Be happy - Keep your Assignments clean and simple! This session will provide best practice information on the EMS\SN Assignment screen features and calculations. The effects of the Position, Calendar, and the Use FTE instead of Calc FTE to Calculate Payments and Do not use Calendar checkboxes will be reviewed.

Presenters: Lorie Bowne
3/6/11
Track: HR
Tags: Employee Management (EMS/SN, Fast Track)

Web Based Vendor Master
This presentation will provide you with a basic understanding of the Vendor Master module with respect to what's currently available via the Web. We'll focus on how to add and maintain vendors, as well as go over some reporting functions.
Presenters: Penny Brown
3/6/11
Track: Finance
Tags: Vendor Master

MONDAY

Administering Your VEBA Plan
Learn the ins and outs of administering your district's VEBA Plan to stay compliant with IRS and state regulations. Plus, learn how healthcare reform affects your VEBA Plan. The presentation will provide a quick VEBA Plan overview and walk you through a typical annual renewal process with a focus on recommended Policy/MOU language. Common funding sources will be covered along with a look at how school employees and retirees need and use this important benefit.
Presenters: Brian Riehs
3/7/11
Track: HR
Tags: Retirement

Advanced Payroll Setup/Processing
Going past the basic setup to utilize WESPaC features for efficient payroll processing. Exact topics to be determined. Please use the comments section to post any questions or processes you would like to hear about.
Presenters: Janice Daley
3/7/11
Track: HR
Tags: Payroll

AESOP and WESPaC Integration
Aesop can streamline payroll processes by extracting absence and substitute information from Aesop and uploading this information into worksheets in WESPaC. In this session you will see how to use the extracts from Aesop to bring over split accounting codes, unique pay amounts and more.
Presenters: Vicky Barnes
3/7/11
Track: HR
Tags: Payroll

An Introduction to Inventory
Whether you have a physical warehouse or just need to account for stacks of new books that pile up during the summer, the Inventory Module can help. This session will introduce you to the WESPaC Inventory module where you will see how it works and learn what it can and cannot do. Can the Inventory module help you? Come and find out!
*This session is offered again on March 8th.
Presenters: Warren Henke
3/7/11
Track: Finance
Tags: Other FM Category

Basic Payroll Setup/Processing
What do all the codes mean? What is Select, Calculate, Post-Verify, and Reporting? A walk through of what is required to run the payroll process. Designed for the new and soon-to-be new, WESPaC users along with those who want a review of the basics.
Presenters: Janice Daley
3/7/11
Track: HR
Tags: Payroll

Certification/Endorsement/Highly Qualified Subject Imports
Discussion and examples of the import process for the certification, endorsement, and highly qualified subject information in HR/Profile/Credits Tab/Certifications Area for district employees. Do's and Don'ts learned through the process.
Presenters: H. Rusty Allen
3/7/11
Track: HR
Tags: Other HR Category

DOUBLE SESSION: S275 Basics and Beyond
This session will include an overview of creating the Initial S275 report in WESPaC, making updates during the year and the final submission of the S275 report.
Presenters: Lynn Roediger
3/7/11
Track: HR
Tags: State Reporting

DOUBLE SESSION: WESPaC Fiscal Budget Overview
Overview of the Fiscal Budget Planning/Process. Two Budget Checklists; one for processing in the Original Budget and one for processing in Budget Planning Records.
Presenters: Stephanie Zarifes
3/7/11
Track: Finance
Tags: Budget

Employee Access from the Ground Up
Have you been waiting to implement Employee Access until the time was right? Come learn what you can do with EA and how to get it set up for your district to use when you are ready.
Presenters: Mandy Bledsoe
3/7/11
Track: HR
Tags: Employee Management (EMS/SN, Fast Track)

Insurance Tracking Open Enrollment
Now your employees can enroll for benefits on-line and eliminate paper enrollment forms. In this session you will learn about how to set up this feature, and how to approve and process open enrollment transactions in WESPaC. See how easy the enrollment process is for your employees and how much time it will save your payroll department.
Presenters: Sandy Marshall
3/7/11
Track: HR
Tags: Insurance (Set-Up, Tracking)

Introduction to Insurance Tracking
Are you new to Insurance Tracking, or not yet using it, but interested in the possibility? Come to this introduction for an overview of the Insurance Tracking Process, as well as demonstrations of initial setup and routine maintenance.
Presenters: Penny Brown
3/7/11
Track: HR
Tags: Insurance (Set-Up, Tracking)

It's All About the Relationship!
Review the Equity Summary Account Managment(ESAM) feature set's purpose and functionality.
*This session is also offered on Tuesday March 8th.
Presenters: Sean Schaeffer
3/7/11
Track: Finance
Tags: Audit & Control

More Account Management Reporting - Using Summary and Detail Reporting Options
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Tags: Account Management

Payroll Based Accounts Payable Scenarios
AP Invoices generated by the payroll process can often cause confusion with the AP Staff. A single payroll transaction has the potential of creating five separate invoices. What are these invoices, what should you do with them, and why are they necessary? This presentation will show you what is happening behind the scenes so you understand the how, what, and why of these mysterious payroll generated invoices.
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Presenters: Warren Henke
3/7/11
Track: Finance
Tags: Financial Mangement

The Glue That Keeps Human Resources and Payroll Together
This session will give you the opportunity to find out how districts have organized their workflow and processes to achieve efficiency. Come and learn how good checks and balances have helped to ensure both offices are informed and clear about their tasks. Note: Cinda Wilkey, WSIPC will facilitate.
Presenters: Cinda Wilkey, Kelly Nybo, Debbie Leighton
3/7/11
Track: HR
Tags: HR Workflow (Organization)

The Power of Sequences
This session will explain sequences and their powerful role in helping you customize the way you sort Account Management reports.
*This session is also offered on Tuesday March 8th.
Presenters: Tracy Green
3/7/11
Track: Finance
Tags: Account Management

Time Off Approval Process - Employee Access
This session will overview how to setup Org Charts for Time Off approvals and the actual approval process. We will also explore how an employee can view their time off information via Employee Access.
Presenters: Andy Lind
3/7/11
Track: HR
Tags: employee access

Tips & Tricks for Implementing AP ACH
Are you worried you might miss a step in implementing AP ACH (direct deposit payments to vendors)? Unsure of how to approach the implementation, or if it will even work for your school district? Come to this session for tips & tricks, as well as a basic outline of the process for implementing AP ACH.
Presenters: Becky Lee
3/7/11

Track: Finance
Tags: Other FM Category

True Time Tips and Scenarios
See the various ways clients are using the remote time entry system. Learn the key points needed to have a successful True Time implementation.
Presenters: Leslie Strickland
3/7/11
Track: HR
Tags: True Time

Use Microsoft Access to Enhance Your WESPaC Reporting Capability
Introduction to Microsoft Access to enhance your WESPaC reporting capability. Learn how to import spreadsheets to Access, create queries, and export to Excel. Use Access to: - combine and customize data from multiple WESPaC reports - find duplicate records - find unmatched records on multiple reports
Presenters: Gloria Behringer
3/7/11
Track: HR
Tags: Data Mining - HR/Payroll

WESPaC Online Requisition Approval Process
This course will look at online requisition approvals, how to add special approvals, view automatic approvals by account code approval sequencing.
Presenters: Sandi Masterman
3/7/11
Track: Finance
Tags: Purchase Orders

What's New in School District Accounting (Beginner/Intermediate)
An overview of new, changing, and upcoming state school district accounting rules and guidance. Topics will include the 2010 and 2011 Legislative sessions, with information to date, as well as Federal reporting requirements and changes.
Presenters: Daniel Lunghofer
3/7/11
Track: Finance
Tags: Other FM Category

Year End Overview
This session will provide an overview of the functionality of the fiscal year end process.
Presenters: Amanda Matz
3/7/11
Track: Finance
Tags: Year End

TUESDAY

An Introduction to Inventory
Whether you have a physical warehouse or just need to account for stacks of new books that pile up during the summer, the Inventory Module can help. This session will introduce you to the WESPaC Inventory module where you will see how it works and learn what it can and cannot do. Can the Inventory module help you? Come and find out!
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Presenters: Sally Malan
3/8/11
Track: HR
Tags: Data Mining - HR/Payroll

DOUBLE SESSION: Crystal Reports for HR
This session will cover: Connecting a Crystal Report to your database that you got from SharePoint or the Customer Portal. Using the WESPaC Quick Pick Viewer and the new WEB Viewer. What to do when you get Crystal Reports Error Messages. Learning how to link the tables when you create new Crystal Report. How to find the more than 100 Example HR and Financial Crystal reports that are already available. Looking at example HR and Financial Crystal reports that might help you. Simple Crystal Reports that you can create in less than an hour. What other types of reporting are available? What training is available? Using the on "Line User Forum" to find answers to Crystal Reports questions. How to join a local "Crystal Reports User Forum" in your area. Subscribing to the "Crystal Reports Tips & Tricks" News Letter. Answering your questions.
Presenters: Cordell Vail
3/8/11
Track: HR
Tags: New HR Category

e-Commerce Setup & Web Requisition Entry
Wanting to set up e-commerce for your district? Wondering how entering an e-commerce Requisition looks? Apprehensive about the process of using e-commerce to convert a Requisition to a Purchase Order? Visit this beginner class on how to set up e-commerce for your district and enter Requisitions through the Skyward Web Interface. Examine the setup portion of KCDA and Office Depot sites. Watch the process of entering a requisition and see the purchase order being electronically sent to the vendor. See how easy and efficient e-commerce can be!

Presenters: Jeanne Lejon
3/8/11
Track: Finance
Tags: E-Commerce

Fast Track How to Course
This session will take you through the steps to implement Fast Track at a School District level. We'll cover Setup options and daily processing tasks and roles. We'll cover some of the most common questions regarding processing applications, and ideas for how to structure screening and interview teams.
Presenters: Barb Couilliard
3/8/11
Track: HR
Tags: Fast Track

Financial Management Budgeting Tips & Tricks
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Payroll Tips and Tricks
In this session you will learn how to solve and avoid some common payroll problems. Learn some tips and tricks that will help you troubleshoot issues on your

own and keep your payroll process running smoothly. This session will cover resetting worksheets, selecting payroll, payroll locks, the payroll calculate and more.
Presenters: Sandy Marshall
3/8/11
Track: HR
Tags: Payroll

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Supplement Your Retirement with DCP
Does your financial plan for retirement include a supplemental savings program? Administered by the Department of Retirement Systems, DCP provides an easy an excellent means of enhancing your financial future. Information will also be provided on fund options, managing your account, and eligible distributions.
Presenters: Jim Mendoza
3/8/11
Track: HR
Tags: Retirement

The Power of Sequences
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Track: HR
Tags: Budget

True Time
True Time is a system within Skyward that lets an employee report their own work hours. You will be learning how the system is used, how to set-up the system and how it is imported the hours into Payroll. True Time is a paperless system; the

whole system is electronic and is access through Employee Access. Come see the demonstration of the program and see if it might work for your school district.
Presenters: Kelley Nybo
3/8/11
Track: HR
Tags: True Time

U.S. Bank Electronic Expense Reporting
This session will cover the basic steps of using the U.S. Bank Procurement card system. We go through the reconciliation process, learn how to track expenses and demonstrate the ease of use using the U.S. Bank Electronic Expense Reporting Systems. Purchases are put into an online account, enabling users to submit accurate expense reporting. U.S. Bank Expense Management is easy to use because it delivers its services directly to employees via the internet and does not require information technology (IT) resources or time-consuming traning
Presenters: Becky Brown
3/8/11
Track: Finance
Tags: Procurement Cards

Understanding Your Pension - SERS/TRS Plan 2 & 3
Wherever you are in your career, it's never too early or too late to start thinking about retirement. This presentation is designed to give you a broad overview of your state administered pension plan. Among the topics covered in this presentation:
* A discussion of the Defined Benefit plan
* A discussion of the Plan 3 Defined Contribution plan
* Retirement eligibility
* How to calculate the defined benefit
* Post-retirement employment
Presenters: Jim Mendoza
3/8/11
Track: HR
Tags: Retirement

Using the Web to Enter and Approve Hiring Requests
Make your hiring process more efficient by allowing selected employees to enter and approve new hire and replacement position requests on the Web. See step-by-step instructions for the Position Request application including the ability to move the requests to Fast Track.
Presenters: Donna Christopher
3/8/11
Track: HR
Tags: New HR Category