

PRELIMINARY AGENDA

SCHOOL ERP PRO USER GROUP MEETING

WELCOME & INTRODUCTIONS

- Discuss next meeting date and hosting site
- Connecting, Collaborating, & Learning – Ongoing Education Offerings

GENERAL SESSION

- Tyler Connect 2023
- User Group Meetings and Importance of registering for tylertech.com
- Employee Access (*subject to change*)

PAYROLL & HUMAN RESOURCES SESSION

- What's New & Updated: v2022.3 – Desktop Version:
 - Workflow Configuration – Portal Default Settings - Good news! You can edit and/or add department information on the Employee Access tab when marking the Allow Editing of Dependents checkbox.
 - Employee Maintenance – Employee Access tab - The Time Off Viewer role stays selected once an employee registers in Employee Access.
 - Reports > Quarterly/Annual > Journal Distribution Detail - The report displays data for positions with correct posted journals.
 - Payroll Processing > Process Payroll - A warning message displays when processing payroll if employees have Negative Federal Contributions: The following employee(s) have negative employee contributions for the Federal Tax Deduction. Please take the appropriate action if needed to correct the negative contributions. Failure to do so could cause issues with W2 reporting.
- What's New & Updated: v2022.3 – Cloud version: Review Release Notes
- Overview:
 - Fiscal Year Rollover Preliminary Setups
 - Fiscal Year Rollover Gotchas
 - Cleaning House in New Year
 - Q & A's

LUNCH BREAK

FINANCE AND PURCHASING & PAYABLES SESSION

- What's New & Updated: v2022.3 – Desktop Version:
 - P/P - Vendors > Vendor Direct Deposit Setup - You can add a direct deposit vendor with the Deduction dropdown.
- What's New & Updated: v2022.3 – Cloud version: Review Release Notes
- Overview:
 - Fiscal Year Rollover Preliminary Setups
 - Tip on disabling Prior Year Email Alerts
 - Why can't you delete old account codes overview
 - Finding inactive account codes linked with detail – Run the Query overview
 - Copy Req/PO vs Exporting PO's
 - Managing year end encumbrances in P&P
 - Q & A's