

# Secretary Training October 1, 2014

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PRESENTED BY DDSD BUSINESS OFFICE

# Today's Overview

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Future Meetings

Google Doc's

Staff Web Portal Access

Running School Budget Reports

Account Code Structure

Special Revenue Funds

Closing: Next steps Feedback

# Future Meetings

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Training Goals

Training Calendar (Google Doc)

One on One Trainings (Google Doc)

# Google Doc's

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Login to District [Email](#)

Creating Documents

- Create
- Upload

Accessing Google Doc's

- My Drive
- Shared With Me

Sharing Documents

Navigation

# Staff Web Portal Access

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## What is the portal?

- The web portal is where staff can access their electronic pay check stubs, W2s, and leave balances. Secretaries and Admin have additional access for workflow.

## Accessing the Web portal

- All regular staff have been setup in the web portal, and can access it using their State ID.

## What is my State ID?

- Licensed employee's State ID numbers can be found on their Smart Find Express absence reporting card. We wanted a uniform login between the systems to reduce the confusion of multiple logins for users.
- Classified employees' will be receiving a similar card with their Name, State ID number, the web portal URL and a place to write in their password.
- Administrators have been notified and are aware of their State ID's already, because they use it to approve purchase requests.

# Running School Budget Reports

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Login to the web portal here

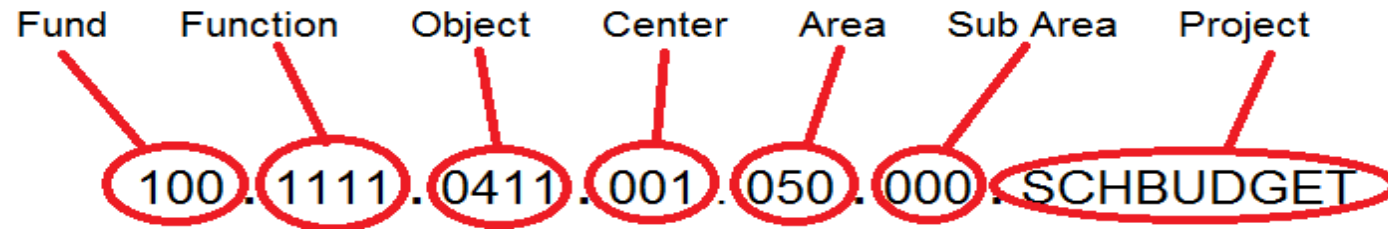
<https://visions.nwtoolbox.org/daviddouglas/Default.aspx>

## Overview

- Getting to the reports
- Entering date parameters
- Selecting detail levels
- Reading the Reports
  - (PO's) Purchase Orders: Purchase orders are how we get approval to obtain supplies and services.
  - Transactions: A transaction is an item that we have ordered, received, and paid an invoice to a vendor or a payment to an employee through payroll.
  - Encumbrances: An encumbrance is a open Purchase order or Payroll waiting to be processed.

# Account Code Structure

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Fund: Determines source of funds and any restrictions **REQUIRED**

Function: Describes program type **REQUIRED**

Object: Describes the type of expenditure **REQUIRED**

Center: Describes the school or facility **REQUIRED**

Area: Further describes program specifically **REQUIRED**

Sub Area: Describes specific district program **District Determines**

Project: Identifies special grants, budget or projects **District Determines**

# Next Steps/Questions?

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## Next Steps

- One On One Trainings Signup
- Future Trainings

## Feedback

- Survey (Survey Monkey)

## Questions ?