2009 Spring MIP User Group Meetings

May 19, 2009 – Cleveland

May 20, 2009 – Pittsburgh

May 21, 2009 – Columbus

Today's Agenda

- **Welcome & Introductions**
- **Going Green – MIP's Paperless Capabilities**
  - Exporting, Attachments, Report Binder & Scheduler, EFT for AP and E-Req
- **Getting the Most out of the MIP Report Writer**
  - Combining Statements with Report Groups
  - Segment Substitution
  - Custom Columns
- **Form 990 GAP Analysis**
  - Are you ready for the changes
- **SD inSITE Report Portal**
  - How can this help you?
- **Sage Knowledge Sync**
  - Alerts for Nonprofits
- **Open Forum**
  - Q&A

Going Green

MIP's Paperless Capabilities

Going Green

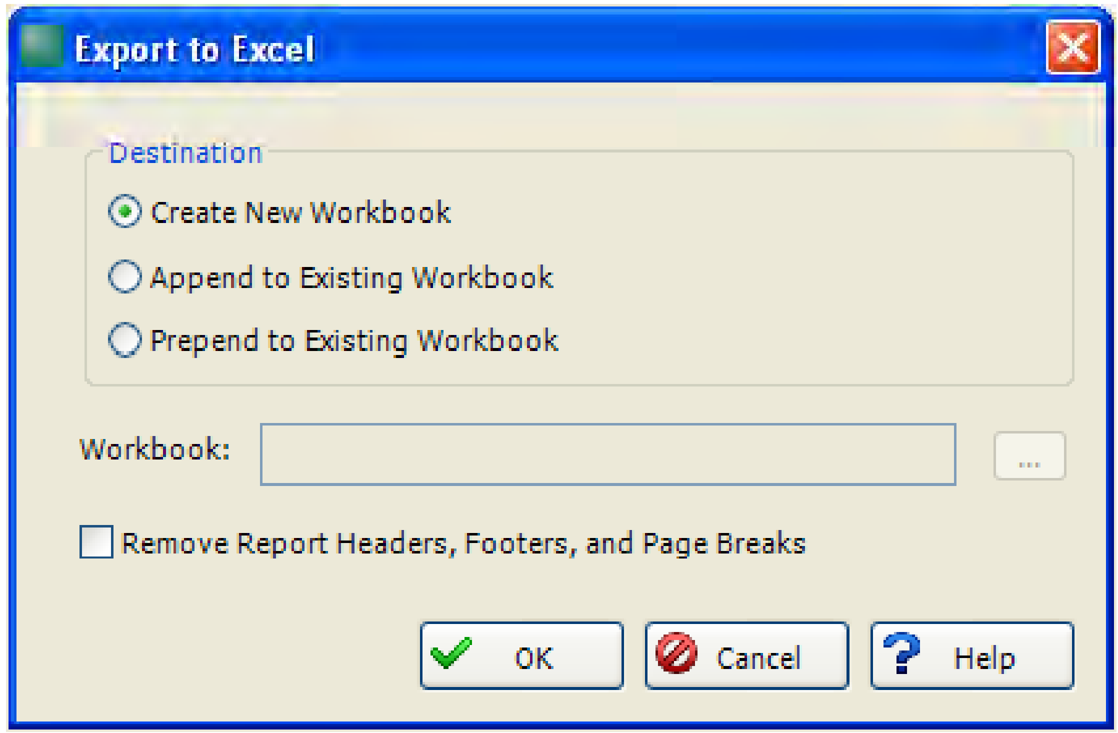
- Paperless and Going Green are the new BUZZ
- Did you know!?!
  That there are IRS regulations around a paperless office
  - Paperless audit
  - Retention of books (IRS 97-22)
- ROI on a paperless office is substantial
  - Cost of storage space, filing cabinets, file folders, personnel to file paperwork, and more!
- Win-Win as organizations want to save $$ and it is great for the environment

Going Green – MIP's Paperless Capabilities
Exporting with Data Import/Export Module

- Excel
  - Options to:

NEW WORKBOOK – Opens in an unsaved document
APPEND – Adds a new worksheet to the end of an existing excel file
PREPEND – Adds a new worksheet to the beginning of an existing excel file

REMOVE HEADERS, FOOTERS & PAGE BREAKS – Great for large volume of data with several pages

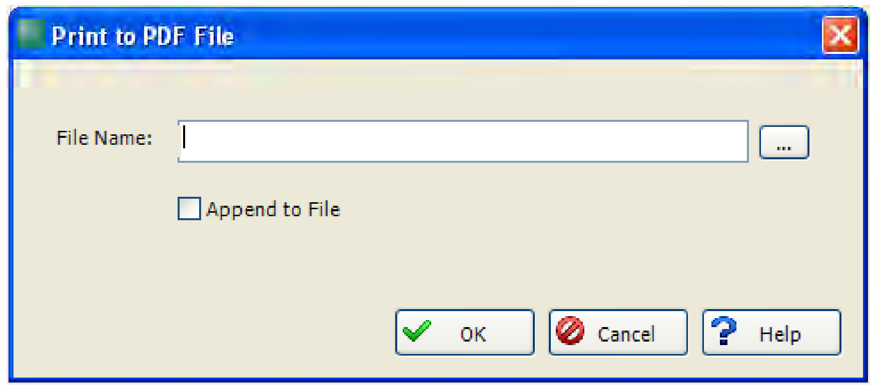


Going Green – MIP's Paperless Capabilities
Exporting with Data Import/Export Module

- PDF
  - Options to:

FILE NAME – Select an existing file to overwrite or type a new file name to create a new document

APPEND TO FILE – Adds report to the end of an existing PDF document



- Email
  - Attaches PDF to email
  - File not saved to any directory
  - Report name = PDF file name

Going Green – MIP's Paperless Capabilities
Exporting with Data Import/Export Module

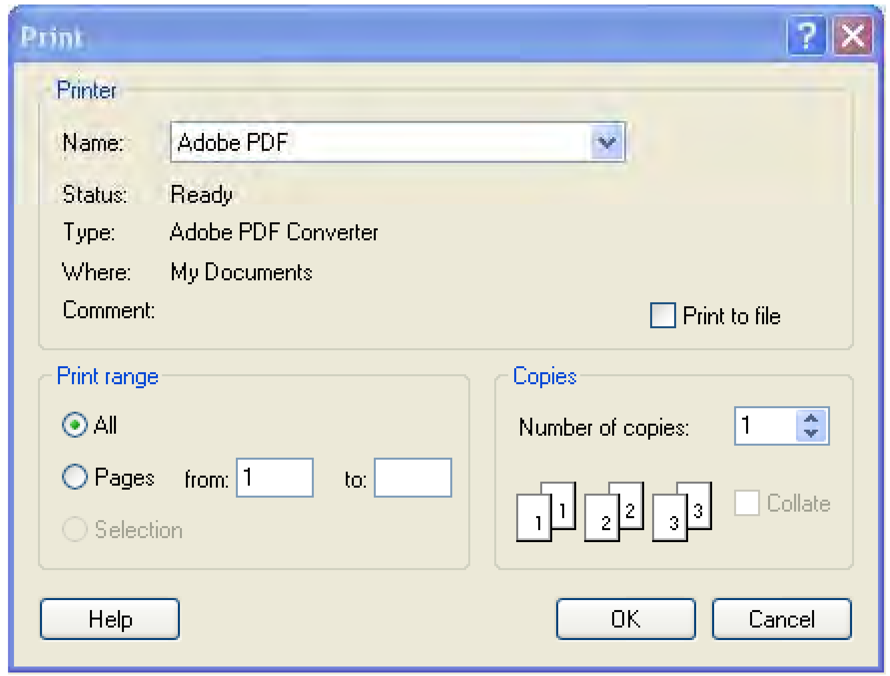
- Export to File
  - File types:

Software Version	File Extension
☆ Comma Separated Variable	*.CSV
HTML Document	*.HTM
Microsoft Access®	*.MDB
Microsoft Word®	*.DOC
♡ Microsoft Excel ®	*.XLS
Print Image	*.PRN
Word Processing Text	*.TXT
XML Document	*.XML

  - Benefits & disadvantages

Going Green – MIP's Paperless Capabilities
Other Exporting Options

- Install PDF Printer
  - Adobe Printer
  - Free options
  - How to's
  - Benefits & disadvantages



Going Green – MIP's Paperless Capabilities
Importing with Data Import/Export Module

- Import from File
  - Payroll Journal Entries
  - Fundraising Software
  - School Administration

```
REM, You can edit this path to identify t
FILE,SESSION, C:\MIP Share\Import\

CONTEXTIDPOSITION,1,6

FILETYPE,CSV

TRANSACTION_READ,3

DISCARDFIRSTNRECORDS,1

CONTEXT,SESSION,HEADER,HSESSN
SESSION_SESSIONNUMID,,AUTONUM
SESSION_STATUS,,BP
SESSION_DESCRIPTION,,Import payroll sess
SESSION_SESSIONDATE,3,,mm/dd/yy
SESSION_TRANSSOURCEID,,CD
ENDCONTEXT

CONTEXT,TRANSENTRY,HEADER,HDOC
TEDOC_SESSION
TEDOC_TRANSOURCE,,CD
TEDOC_DOCNUM
TEDOC_DESCRIPTION,,Import payroll doc
TEDOC_PLAYER_ID
TEDOC_DOCDATE,3,,mm/dd/yy
TEDOC_DUEDATE
TEDOC_MISCINFO
ENDCONTEXT

CONTEXT,TRANSENTRY,DETAIL,DDOC
TETRANS_SESSIONNUMID
TETRANS_DOCNUM
TETRANS_DESCRIPTION,2
```

Account	Description	Transaction Date	Type	Amount
1100001101	NET PR & TAXES	05/15/2005	CR	-202022
2117001101	SAM CLUB	05/15/2005	CR	-900
2100101101	GENERAL DEDUCTION	05/15/2005	CR	-3816.6
2100101101	UNITED WAY	05/15/2005	CR	-367.88
2115001101	401K	05/15/2005	CR	-10628.7
2110101101	HEALTH INSURANCE	05/15/2005	CR	-10692.5
2116001101	MEDICAL REIMBURSE	05/15/2005	CR	-3110.43
2116001101	DEPENDENT CARE RE	05/15/2005	CR	-2508.44
5.0001E+16	OTHER 3 EARNINGS	05/15/2005	DR	132.73
5.0001E+16	WAGES - ACCOUNTIN	05/15/2005	DR	163870.7
5.0001E+16	WAGES - ADMIN	05/15/2005	DR	37353.64
5.0001E+16	WAGES - IT	05/15/2005	DR	7916.12
5.1001E+16	EMPLOYER TAX EXPE	05/15/2005	DR	15652
5.0002E+16	ESP - EXTRA SERVICE	05/15/2005	DR	9121.71

Going Green – MIP's Paperless Capabilities
Attachments

- Attach to:
  - Transactions
  - Employee Files
  - Grant Admin
  - Vendor Files
  - Customer Files
  - Fixed Assets

- Linked vs. Encrypted

Going Green – MIP's Paperless Capabilities
Report Binder & Scheduler Module

- **Report Binder Improvements**
  - Print Binders on Demand
    - PDF, email, Excel, or ~~Printer~~
  - Reorder reports within your Binders
- **New Scheduler Options**
  - Print from the scheduler
    - PDF, Excel, or ~~Printer~~
  - Notifications can be sent via email
- **Groundwork laid for emailing reports**

Going Green

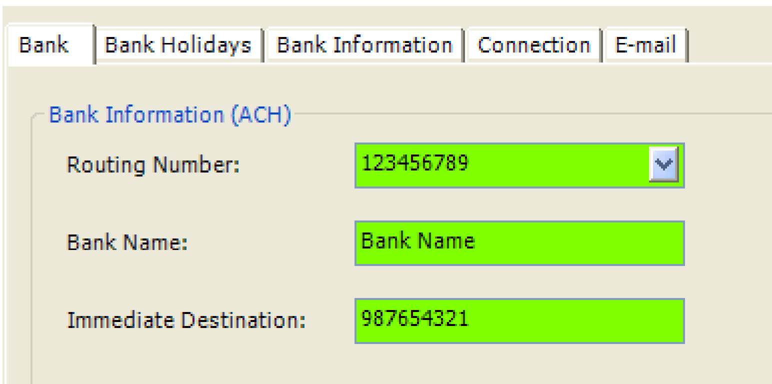
EFT for AP Module

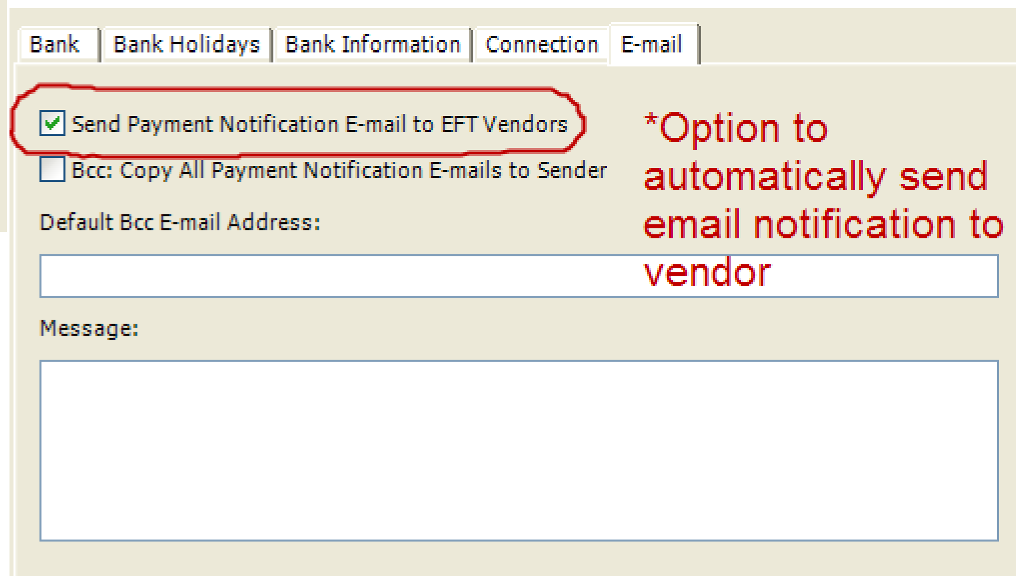
Going Green – MIP's Paperless Capabilities
EFT for AP Module

- **Electronic Funds Transfer ROI**
  - Paper payments cost approximately $2.50 each according to the Institute of Management and Administration (IOMA)
  - Cut payables costs by $2.00 per check (75%)
  - Reduce exposure to check fraud
  - Improve cash management

Going Green – MIP's Paperless Capabilities
EFT for AP Module

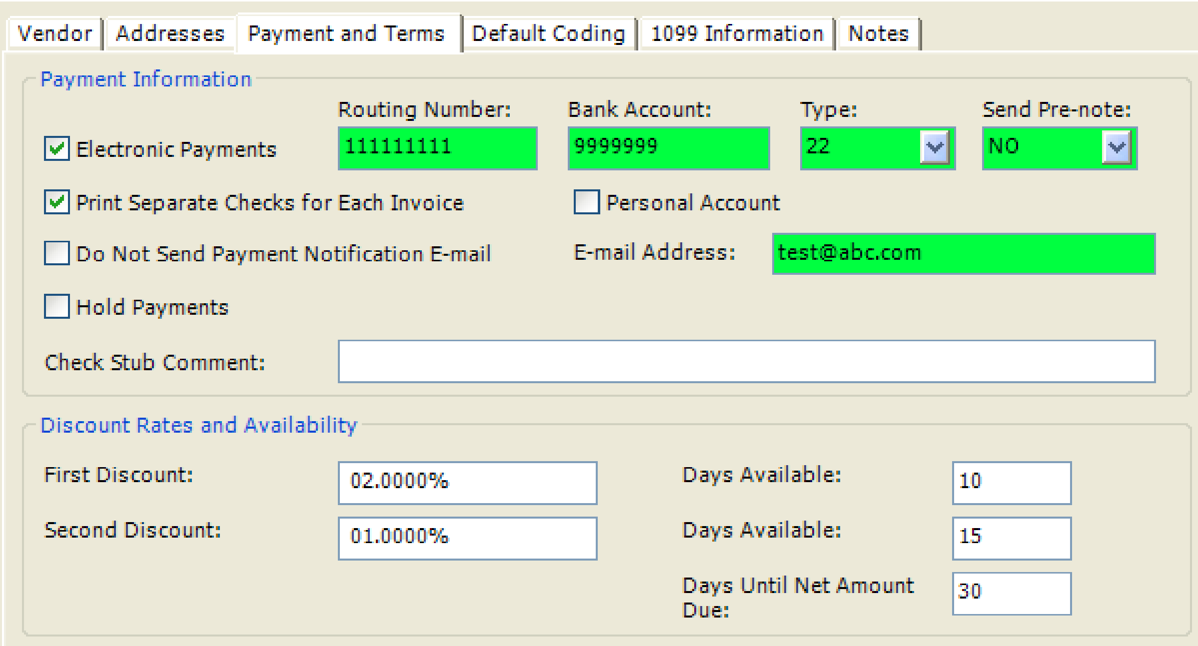
- Set-Up Organization banking information in Administration





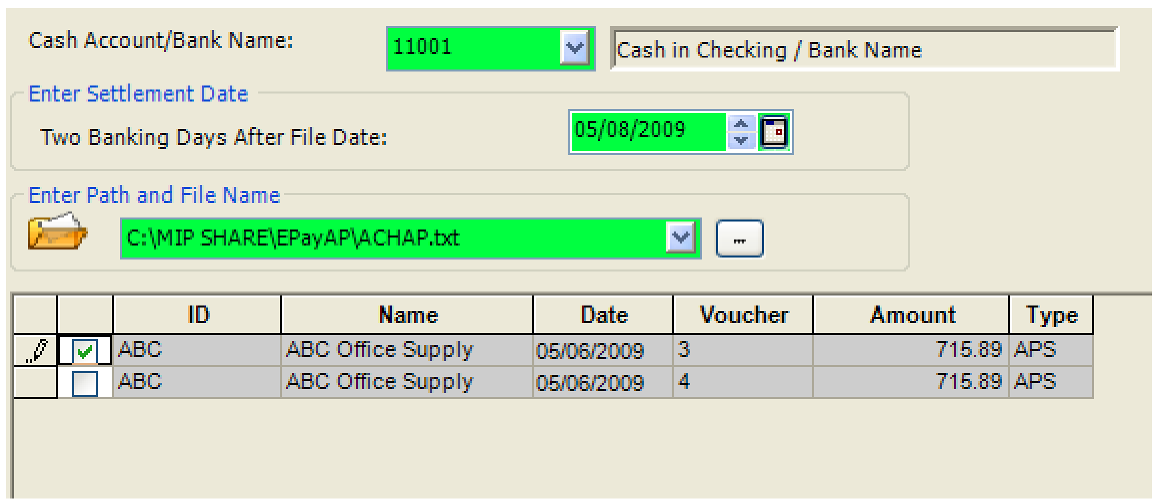
Going Green – MIP's Paperless Capabilities
EFT for AP Module

- Set up vendor banking information in vendor maintenance



Going Green – MIP's Paperless Capabilities
EFT for AP Module

- Select invoices to pay
- Pay selected invoices
- Create/Send Electronic Payments

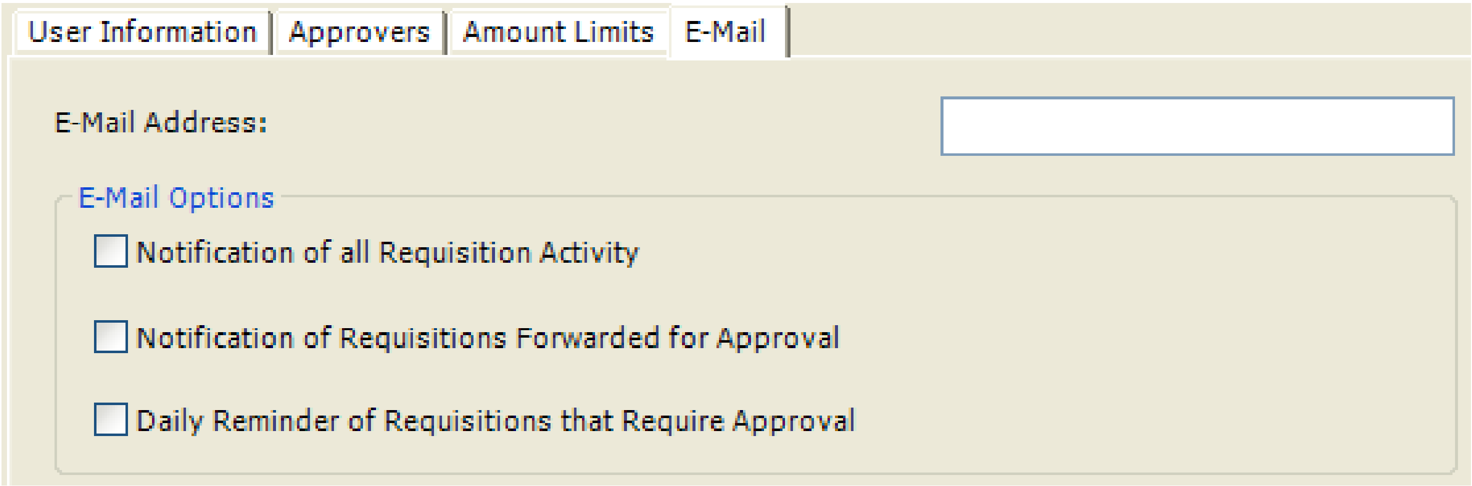


Going Green

E-Req Module

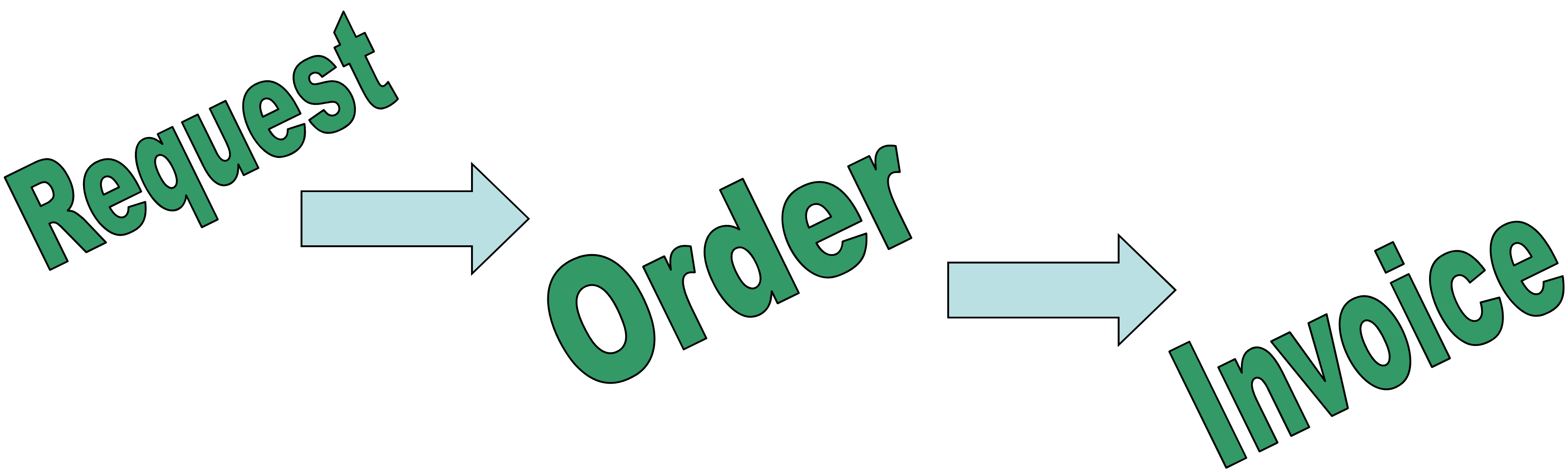
Going Green – MIP's Paperless Capabilities
E-Req Module

- No paper required
  - Expedite approvals
  - Email notification options



Going Green – MIP’s Paperless Capabilities
E-Req Module

- Streamline purchasing
  - E-Requisition to purchasing
  - Purchasing creates encumbrance
  - Encumbrance relieved in accounts payable



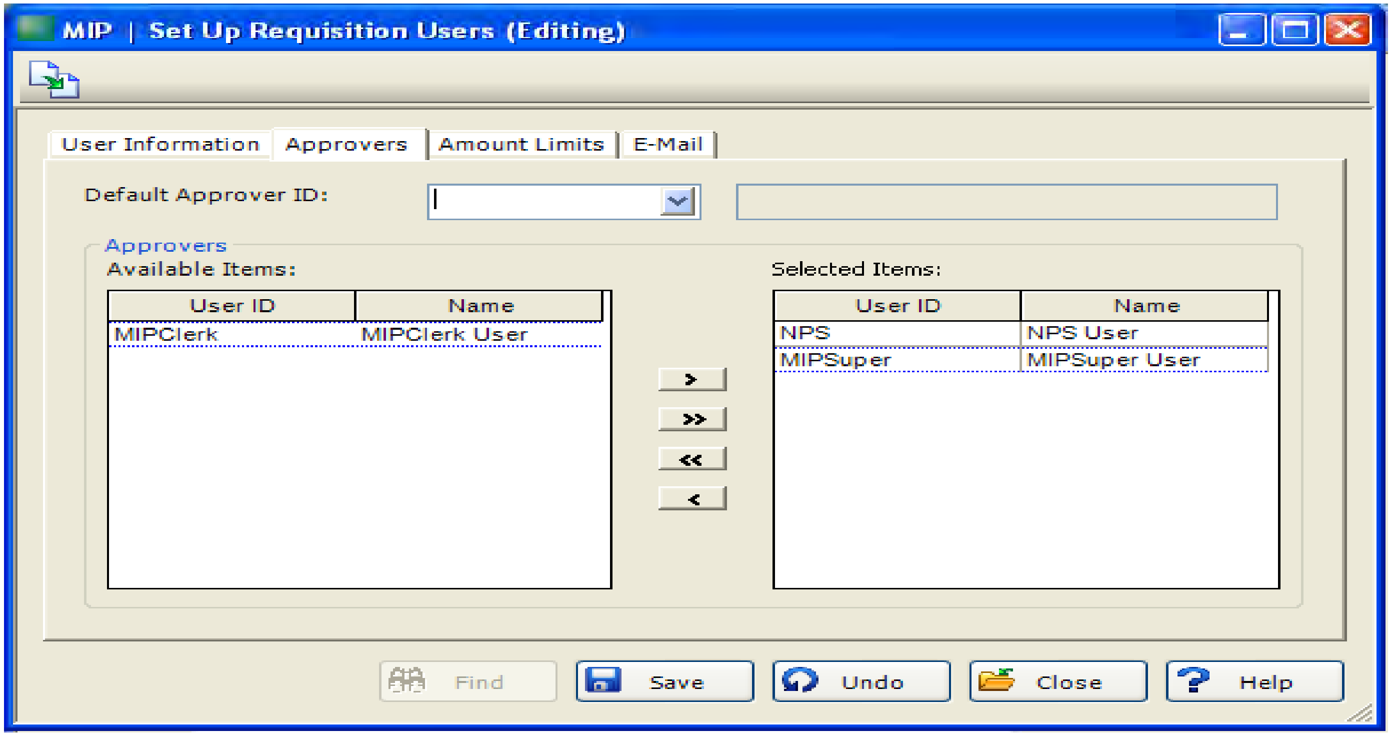
Going Green – MIP's Paperless Capabilities
E-Req Module

- Enhance or establish purchasing controls
  - Option to check against budget
  - Select purchaser type

Code	Description
ROO	Requestor Only
AP1	Approver Who Cannot Self-Approve
AP2	Approver Who Can Self-Approve
ADM	Requisition Administrator

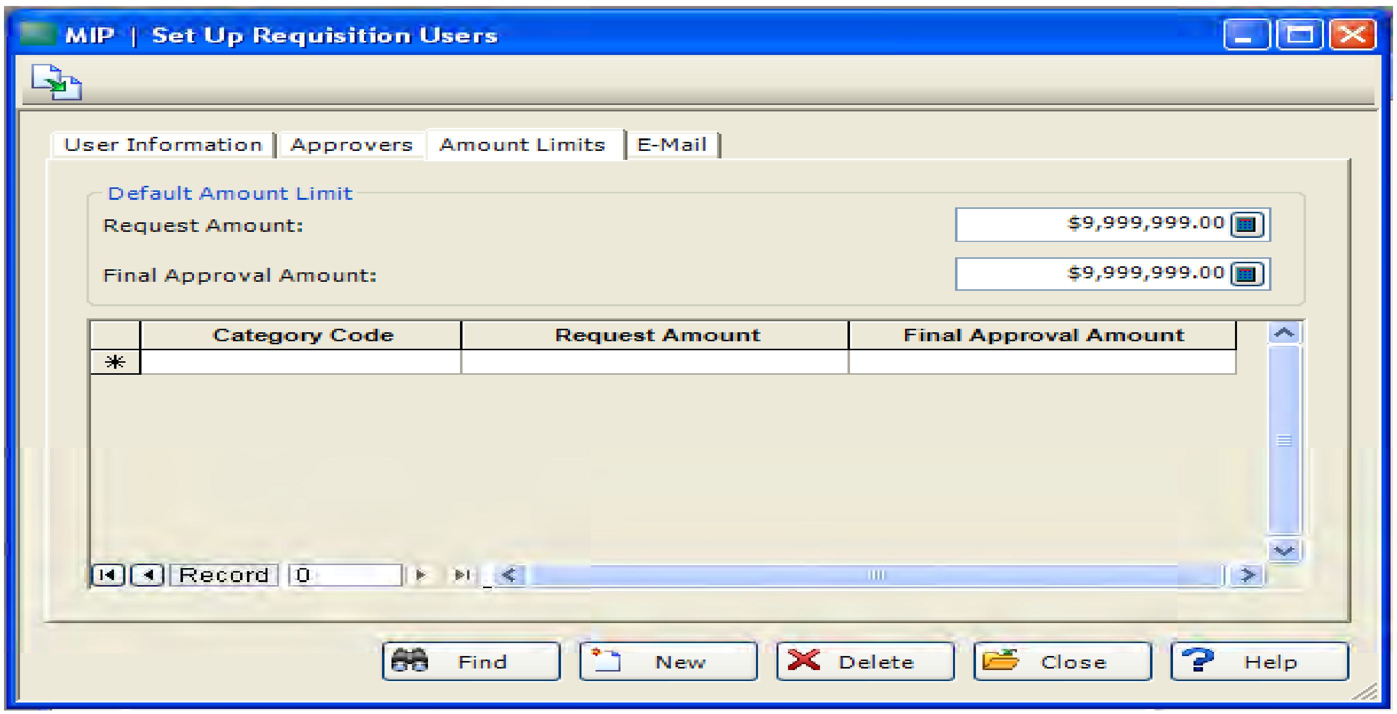
Going Green – MIP's Paperless Capabilities
E-Req Module

- Enhance or establish purchasing controls
  - Select approvers for purchasers



Going Green – MIP's Paperless Capabilities
E-Req Module

- Enhance or establish purchasing controls
  - Set purchase and approval limits



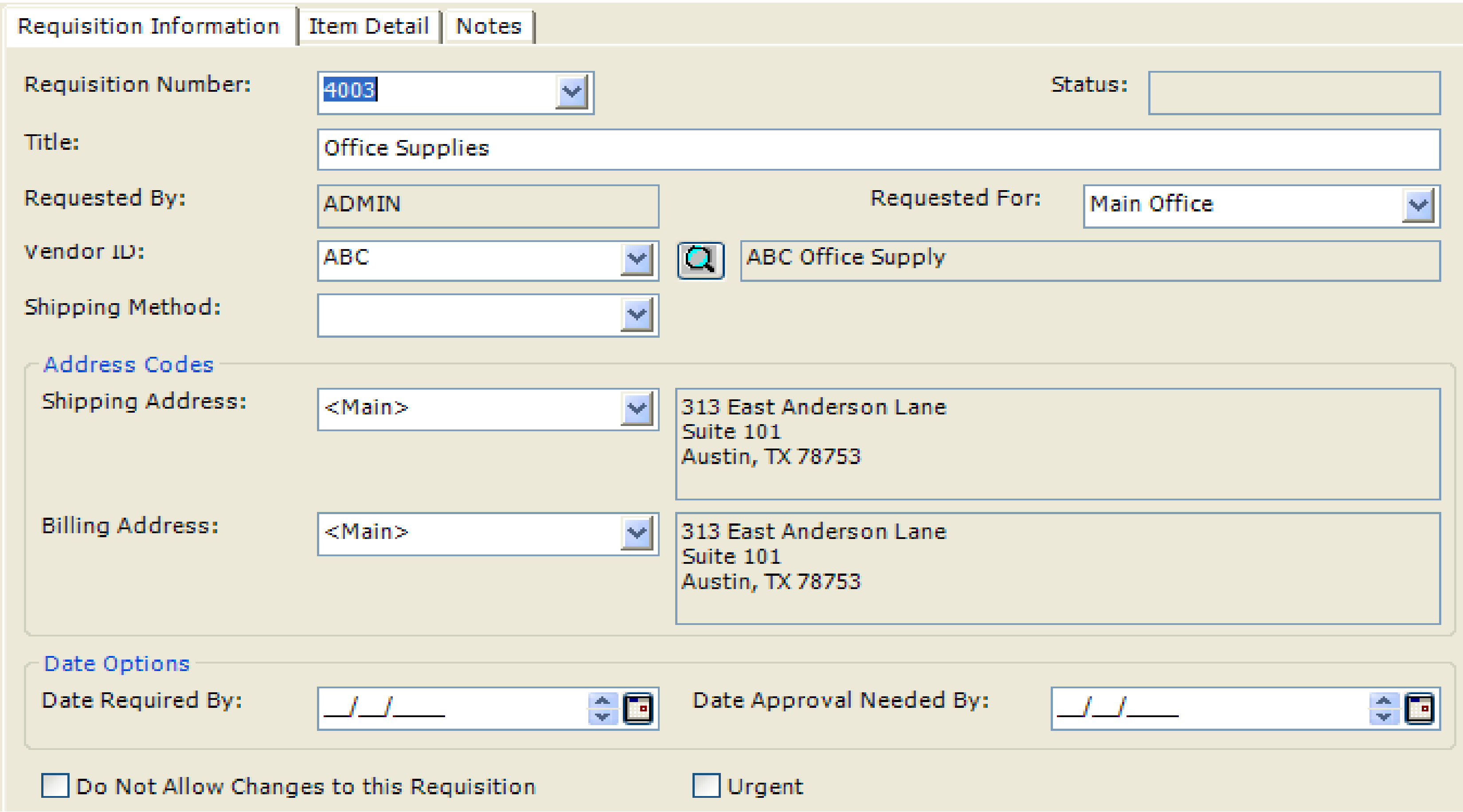
Going Green – MIP's Paperless Capabilities
E-Req Module

- Easy to use
  - Dashboard to review orders

	Requisition Number	Title	Status	Requested By	Requisition Total	Urgent	Current Owner	Vendor ID
+	1	Office Supplies	Completed Request	SiteMngr	117.50		SiteMngr	OFF07788
−	2	Office Supplies	Final Approval	SiteMngr	230.94		Purchasing	OFF07788

	Category Code	Item Code	Item Description	Purchase Unit	Quantity	Unit Price	Item Total	Item Status
	Consumablesupply		29592794 White Paper	BOX	10.00	22.50	225.00	Open
*	Consumablesupply		98579734 Black Bic Pens	BOX	2.00	2.97	5.94	Open

Going Green – MIP's Paperless Capabilities
E-Req Module



Going Green – MIP's Paperless Capabilities
E-Req Module

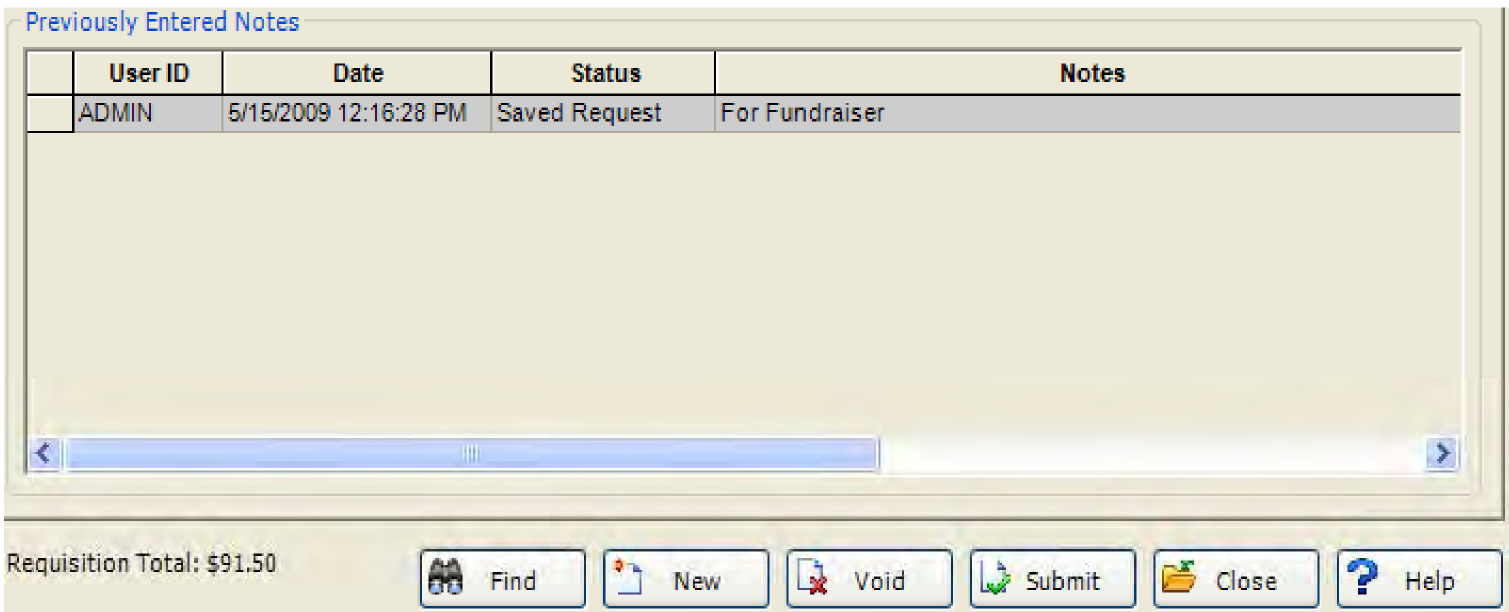
- Easy to use
  - Inventory Items
  - Distribution Codes

Requisition Information | Item Detail | Notes

	Category Code	Item Code	Item Description	GL Code	Distribution Code	Purchase Unit	Quantity	Unit Price	Item Total	PO/Shipping #	Item Status
	Office Products	G1022	Black ball point pens	57001	General	Boxes	6.00	15.25	91.50		
*											

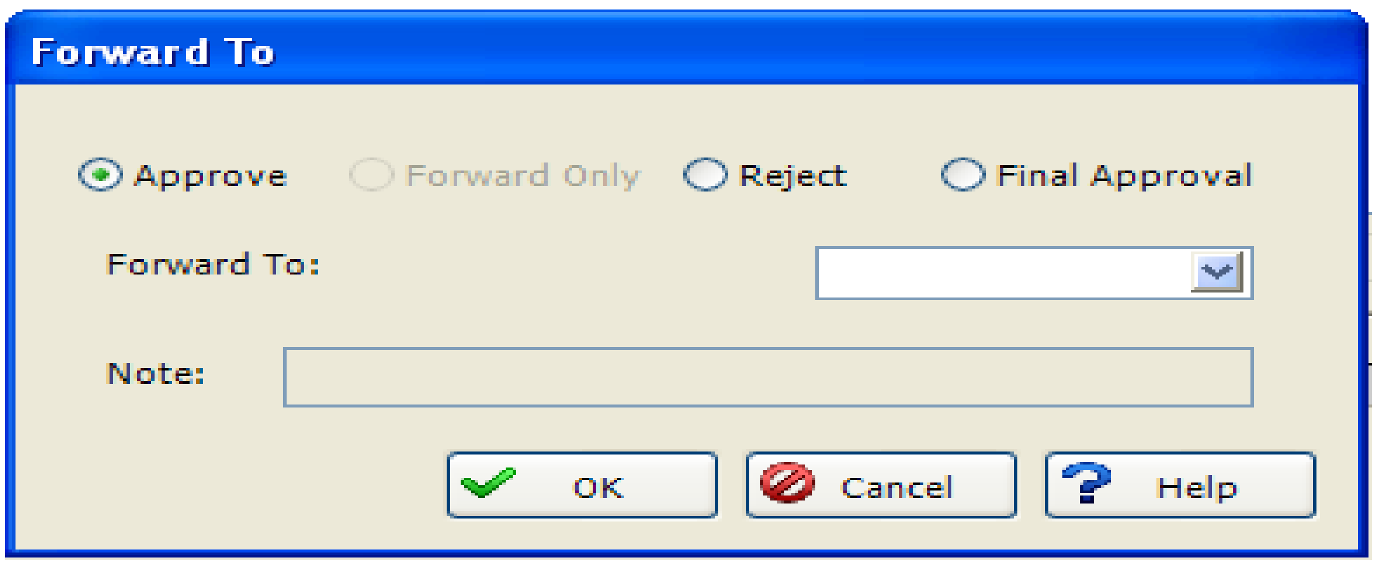
Going Green – MIP's Paperless Capabilities E-Req Module

- Easy to use
  - User Tracking
  - Notes by user



Going Green – MIP's Paperless Capabilities
E-Req Module

- Easy to use
  - Approve
  - Final Approve
  - Reject



Going Green – MIP's Paperless Capabilities Review

- Data Import & Export
- Attachments
- Report Binder & Scheduler
- Electronic Funds Transfer
- Electronic Requisitions

MIP Report Writer

Getting the Most out of the MIP Report Writer

1. Using **Combining Statements** with **Report Groups**

2. Using **Segment Substitution** on Reports

3. Using **Custom Columns with Date Overrides**

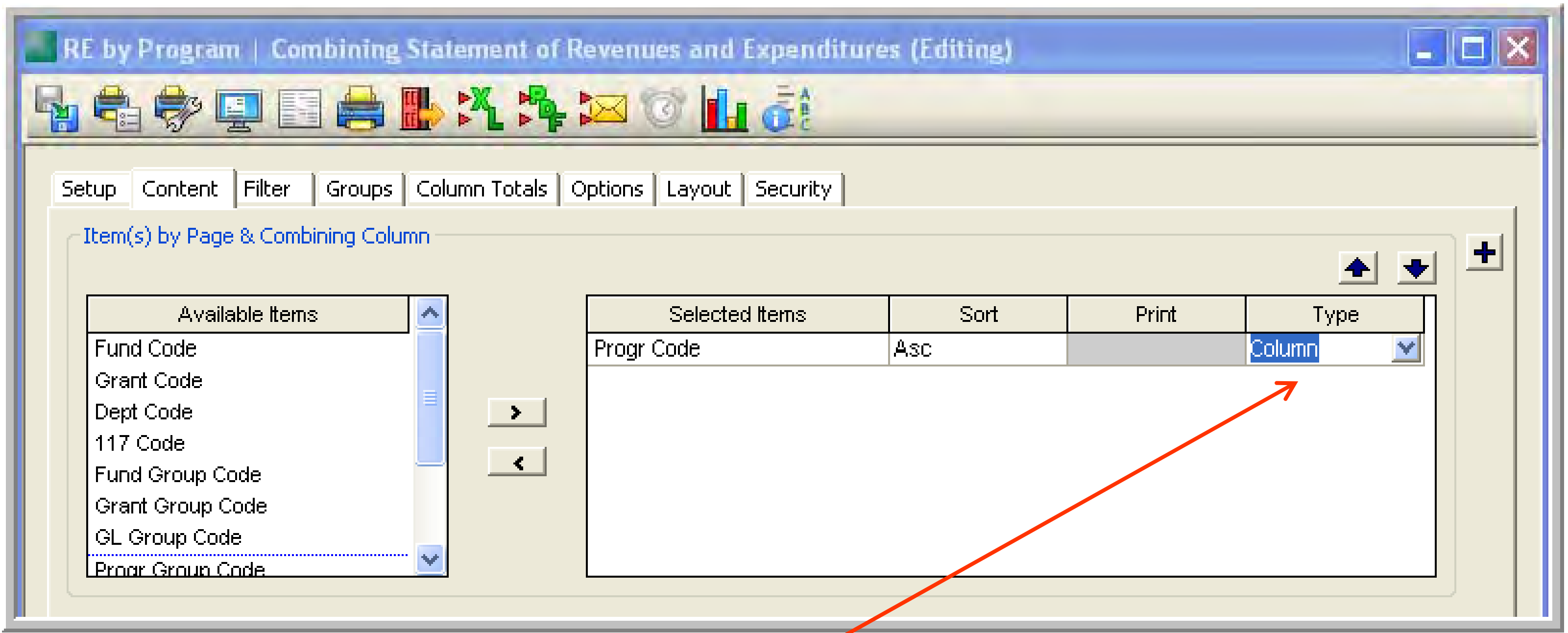
Getting the Most out of the MIP Report Writer - Combining Statements

- **Combining Statements** include:
  - Combining Balance Sheet
  - Combining Stmt of Revenue/Expense
  - Combining Stmt of Cash Flows
- Allow you to select a **segment** to use as a Column in your report
- Great when you want to analyze a dept, grant, function, etc. on **one sheet** of paper

Social Service Agency
Revenues & Expenditures
From 5/1/2009 Through 5/31/2009

	Health Care	Social Services	Subtotal Human Services	Food Services	Day Care	Total
Revenues						
State Grants Revenue	0.00	0.00	0.00	0.00	0.00	0.00
Federal Grants Revenue	763.15	0.00	763.15	0.00	0.00	763.15
Investment and Interest Revenue	0.00	7,666.52	7,666.52	0.00	0.00	7,666.52
Service Fees	231.60	972.05	1,203.65	0.00	4,291.70	17,617.25
Education Program Revenue	11,156.72	5,875.00	17,031.72	7,875.00	16,125.00	41,031.72
Community Training Revenue	28,833.53	2,074.48	30,908.01	1,457.12	10,141.61	42,506.74
Health Program Revenue	17,243.33	0.00	17,243.33	0.00	0.00	17,243.33
Finance Charge Revenue	12.00	18.00	30.00	42.00	78.00	150.00
Total Revenues	58,240.33	16,606.05	74,846.38	9,374.12	30,636.31	126,978.71
Expense						
Personnel Costs						
Salaries	6,796.47	9,212.53	16,009.00	869.51	18,967.16	35,845.67
Overtime Expense	191.08	258.02	449.10	0.00	506.48	955.58
Bonus Expense	24.00	36.00	60.00	84.00	156.00	300.00
Payroll Taxes	0.00	0.00	0.00	0.00	0.00	0.00
Social Security Taxes	434.69	589.46	1,024.15	59.11	1,217.02	2,300.28
Medicare Taxes	101.65	137.90	239.55	13.82	284.60	537.97
Federal Unemployment Taxes	0.00	0.00	0.00	0.00	0.00	0.00
State Unemployment Taxes	2.49	3.72	6.21	8.69	16.16	31.06
Worker's Comp Expenses	21.22	28.80	50.02	2.47	58.90	111.39
Health Insurance	316.77	432.69	749.46	116.41	967.53	1,833.40
Life Insurance Exp	0.62	0.88	1.50	0.10	1.74	3.34
Retirement Matching Exp	101.44	137.02	238.46	1.26	270.20	509.92
Other Employee Benefits	0.00	0.00	0.00	0.00	0.00	0.00
Total Personnel Costs	7,990.43	10,837.02	18,827.45	1,155.37	22,445.79	42,428.61
...ancy Cost...						

Combining Statements

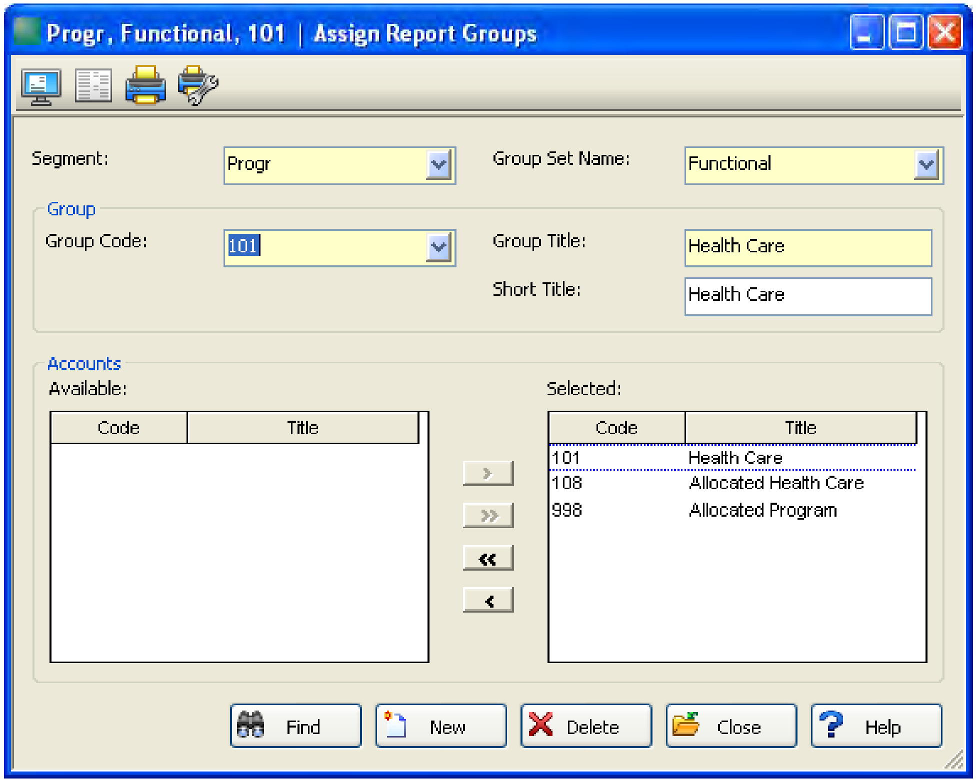


- Easy to set up using **Content tab**
- BUT:
  - Sometimes **too many columns** for one page
  - **Sort order** of columns not always the best

Too Many Columns? Use Report Groups

- Use **Report Groups** to create customized *groupings* of segments
  - This example shows a *grouping* of **Programs** by function (*Health Care*)

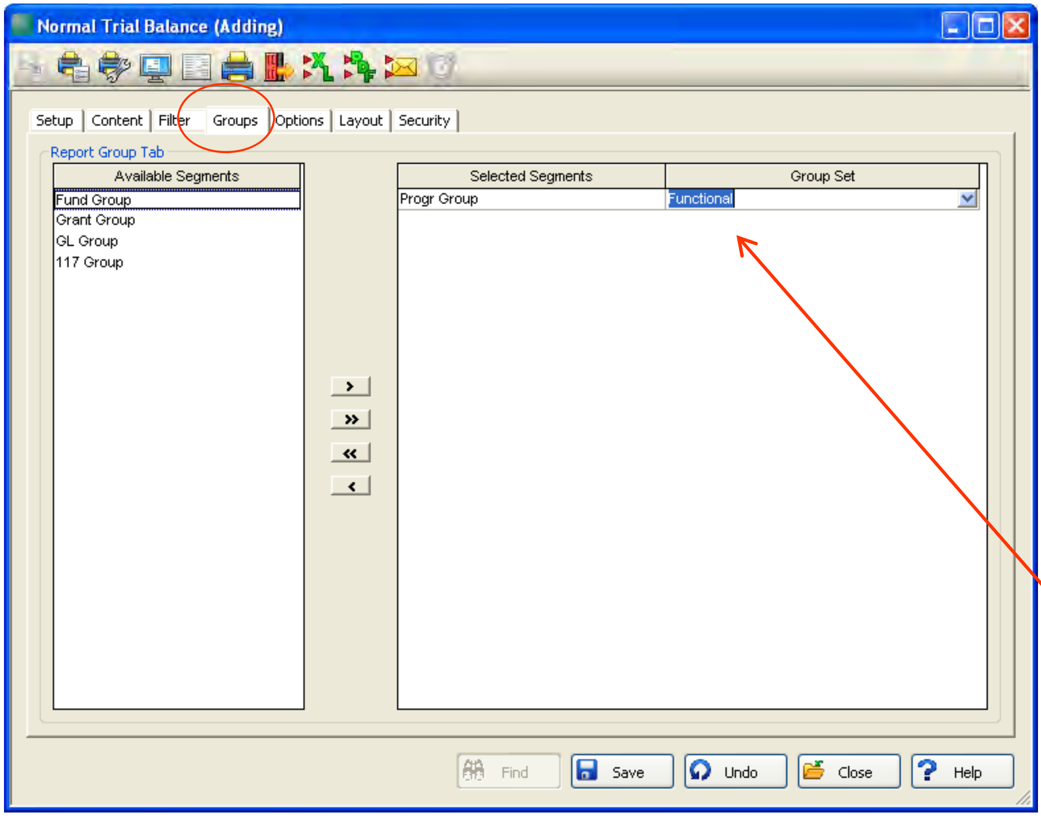
- Then, use this **Report Group Set** as a **Column** in your **Combining Report**



Adding Report Groups

- Use **Reports→Assign Report Groups**
- Pick the **segment** you wish to group
- Give an overall descriptive name to the **Group Set**
  - e.g. Functional, Federal, BoD, etc.
- Create groups by giving each an **ID Code and Title**
- Use the "**mover**" buttons to select the items (segment codes) that comprise each group

Report Groups

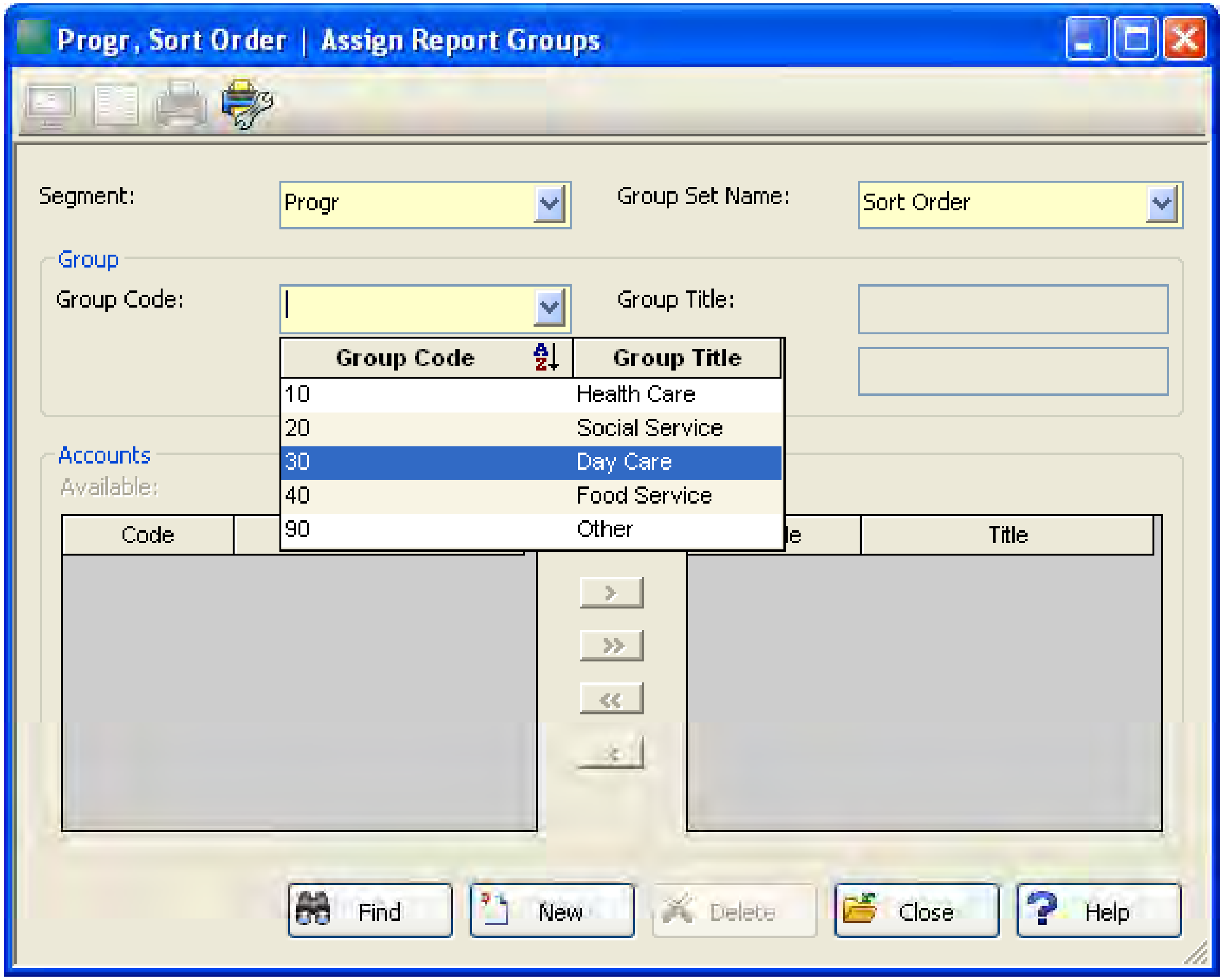


- Once created, **Report Groups** can be added to **many** financial reports
  - Not just Financial Stmts, but TB, GL, Journals, etc.
- Use the **Groups tab** in the Report Writer, and select the **Group Set** name

Column Order Inconvenient? Use Report Groups!

- If column order is sub-optimal, use **Report Groups** to *revise the order in which the columns appear*
- Set up a **new Report Group** (call it "Sort Order")
- Use a **NUMERIC Code** for each Column (in the order you wish it to appear)
  - Suggest 10, 20, 30, etc. to leave room for future items
- Assign **one or more segments** to each Group ID
- Use the **Group Set** (rather than Segment Code), in the **Combining Report**
  - Can also use this **to exclude** columns you wish to omit (e.g. *N/A*)

Sample “Sort Order” Report Group



Getting the Most out of the MIP Report Writer - Segment Substitution

- Segment Substitution allows you **to replace GL detail** with a **different segment** on a Financial Statement
  - On Financial Statements ONLY
  - Set up through Financial Stmt Formats
- For example:
  - On a **Balance Sheet**, break down Fund Balance by Fund or Restrictions Code
  - On a **Rev/Expense Stmt**, break down an area of Revenue or Expense by department or other segment

Getting the Most out of the MIP Report Writer - Segment Substitution

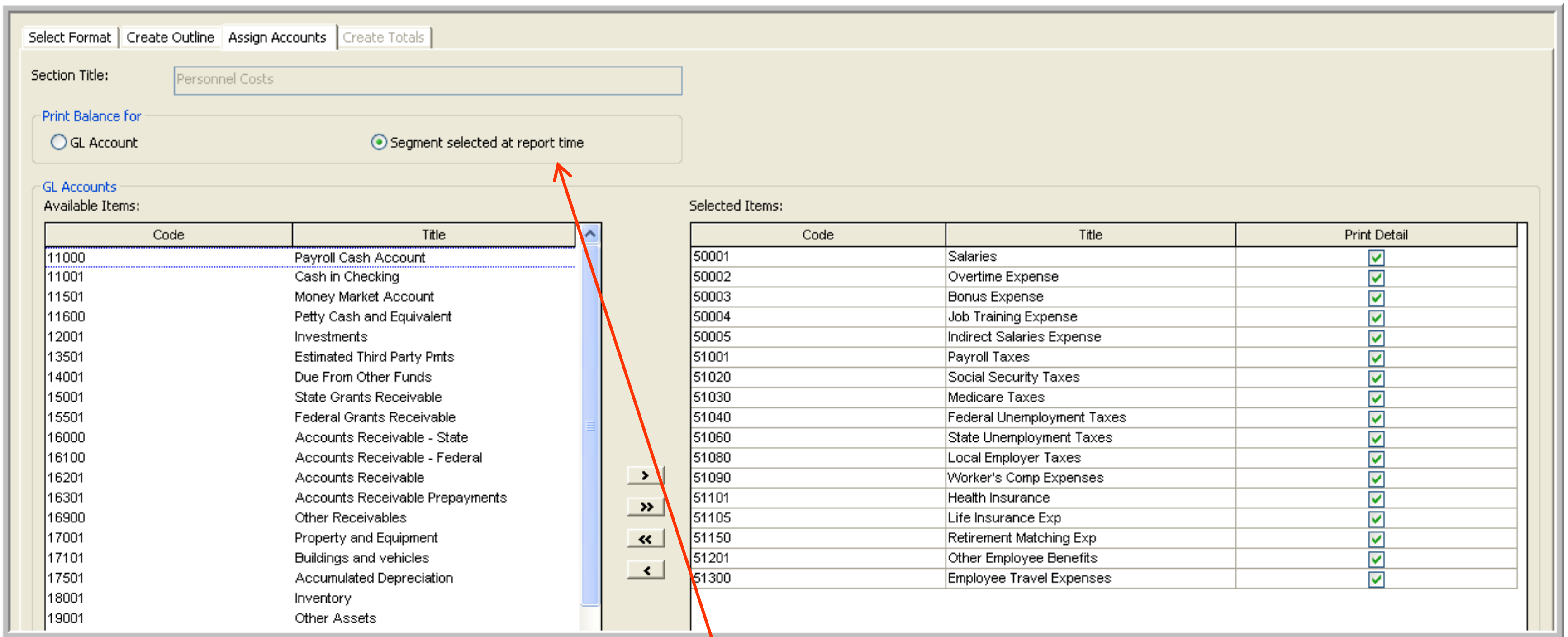
Discussion:

- A “normal” Revenue Expense report will show **multiple GL accounts** under *Personnel* category

- Suppose you would like to keep the **same GL assignments**, but see overall *Personnel* costs broken down by **Program** (rather than GL account)

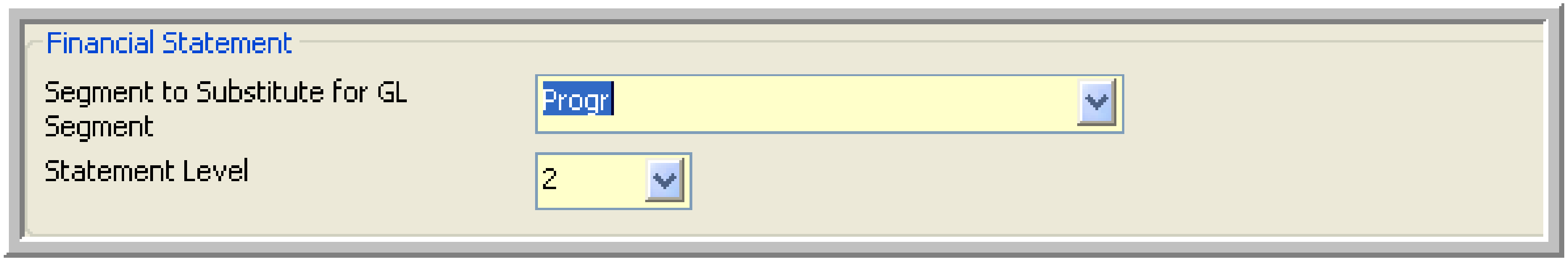
Expense	
Personnel Costs	
Salaries	213,318.68
Overtime Expense	5,733.48
Bonus Expense	1,800.00
Payroll Taxes	0.00
Social Security Taxes	13,023.20
Medicare Taxes	3,202.39
Federal Unemployment Taxes	0.00
State Unemployment Taxes	588.08
Worker's Comp Expenses	663.96
Health Insurance	10,769.00
Life Insurance Exp	19.84
Retirement Matching Exp	3,059.52
Other Employee Benefits	23.48
Total Personnel Costs	252,201.63

Segment Substitution Example



- Set up Financial Stmt as usual, with multiple GL accts assigned to *Personnel*
- Click **ON: Segment Selected at Report Time**

Segment Substitution Example



- In **Report Writer**, under **Options tab**, select **Program** as the *Segment to Substitute*

Segment Substitution Example

Expense		
Personnel Costs		
Health Care	47,724.14	47,835.13
Social Service	64,701.99	68,095.05
Food Service	6,335.68	6,665.73
Day Care	107,089.60	112,704.22
Development Office	0.00	0.00
Pooled Program	26,350.22	0.00
Total Personnel Costs	252,201.63	235,300.13

- Now the costs in this area (*Personnel*) only are broken down by **Program code** rather than GL
- Note that **same costs are included**; (same **GLs)** but with more meaningful breakdown
  - Rest of report stays the **same**
  - **Budget** follows Program breakdown

Getting the Most Out of the Report Writer – Custom Columns for Grant Periods

Issue:

- Assume that **grant period** is different than **fiscal year**

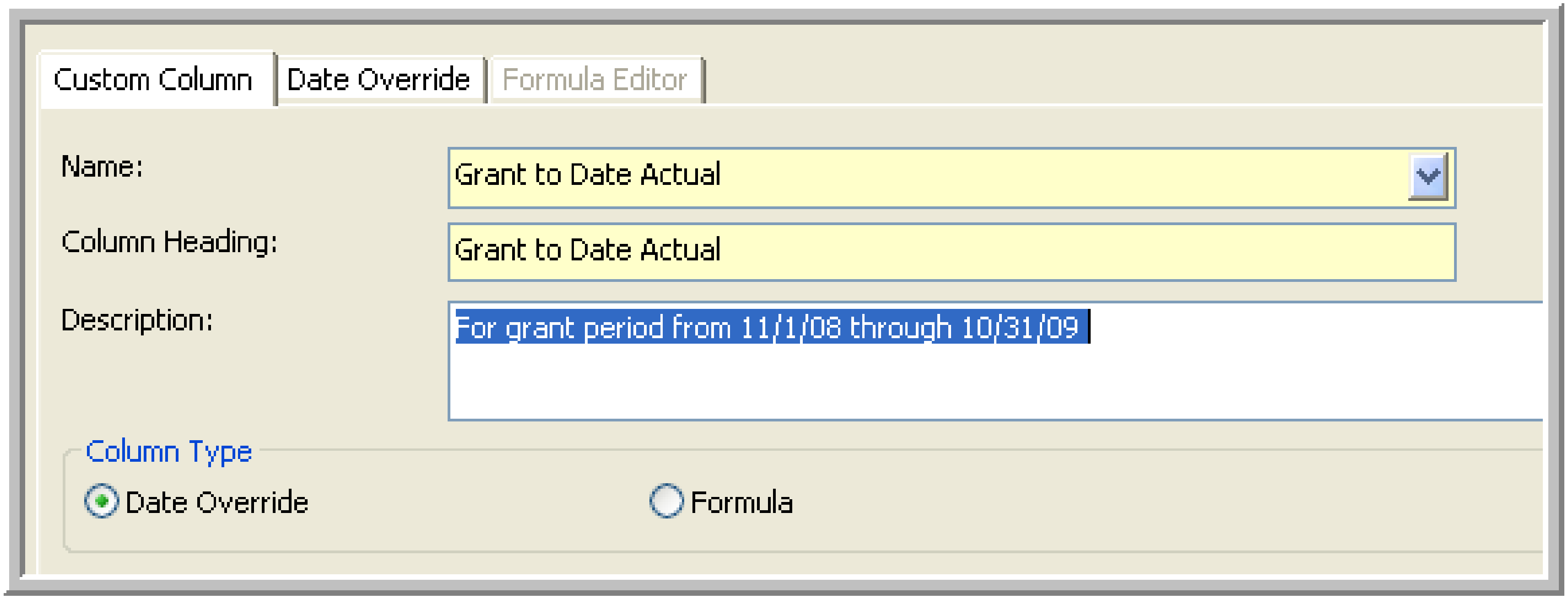
How to get **Fiscal YTD** and **Grant to Date** on SAME report??

- When writing a report, can modify the dates in the Setup tab to be either Fiscal Year **OR** Grant Period (not **both**)

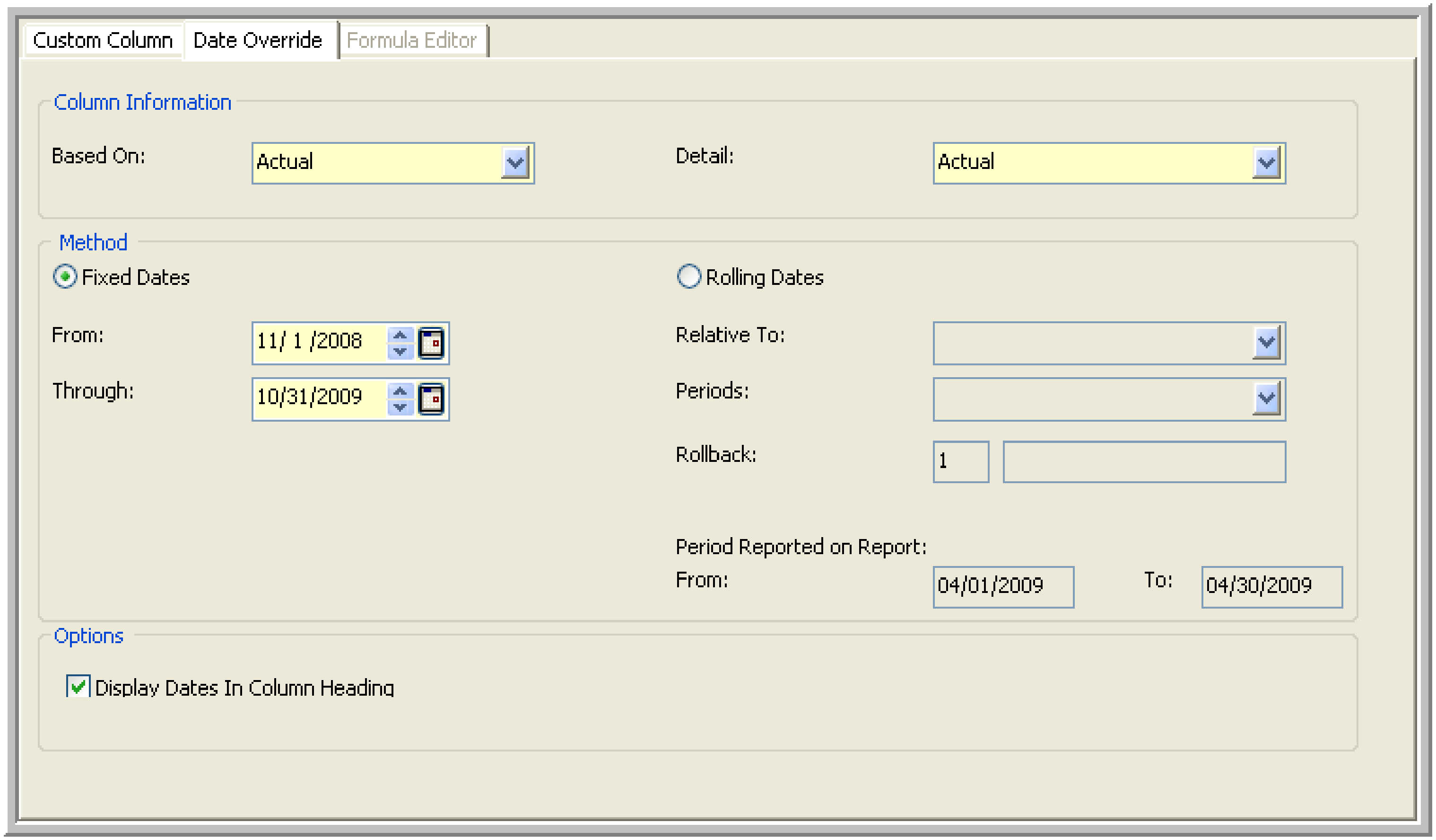
- Use **Custom Columns with Date Override** on the report

Custom Columns with Date Override

- Select **Custom Columns**, enter Column Name and Description
- Choose **Date Override:**



Set Up Custom Column with Fixed Dates:



Set up another column for **Grant to Date Budget Amount**

Custom Columns for Grant Periods

- Add **both Columns** to report in Report Writer
- Report shows **Fiscal YTD and Grant to Date** on same report:

Selected Columns	Sort	Show Total	Width	Wrap	Repeat Column
⊟ Title		☐	2.00	☑	☐
Financial Statement Sect	Asc	☐		☑	☐
Current Period Actual	None	☐	1.00	☑	☐
Current Year Actual	None	☐	1.00	☑	☐
Total Budget - Original	None	☐	1.00	☑	☐
Grant to Date Actual	None	☐	1.00	☑	☐
Grant to Date Budget	None	☐	1.00	☑	☐

Social Service Agency

Statement of Revenues and Expenditures - Detail

From 5/1/2009 Through 5/31/2009

	Current Period Actual	Current Year Actual	Total Budget - Original	Grant to Date Actual (11/1/2008 - 5/31/2009)	Total Grant Budget (11/1/2008 - 10/31/2009)
Operating Revenue					
Grant Revenue	763.15	46,135.35	99,528.76	97,263.47	85,383.40
Program Revenue	47,576.86	215,167.58	411,727.18	339,915.42	261,800.27
Investment Income	7,666.52	7,666.52	22,979.77	5,179.02	9,681.85
Other Income	1,153.15	1,862.95	5,054.76	2,528.30	3,266.36
Total Operating Revenue	57,159.68	270,832.40	539,290.47	444,886.21	360,131.88
Total Revenue	[illegible]	[illegible]	[illegible]	444,886.21	

990 Gap Analysis

990 Update and Product Presentation

990 Gap Analysis Product Goals

- Educate clients and their Board about the new form and requirements
- Organize the Gap Analysis Process for our Clients
- Reduce the time required by Schneider Downs staff to answer questions and manage the preparation process
- Assist clients in developing data, process and procedures before year end

2008 Form 990: Transition Relief

Use of redesigned Form 990 may be transitioned for smaller exempt organizations as follows:

Year	Form 990-N	Form 990-EZ	Form 990
2008	Gross receipts normally less than $25,000	Gross receipts are greater than $25,000 and less than $1 million AND assets are less than $2.5 million	Gross receipts greater than or equal to $1 million OR assets greater than or equal to $2.5 million
2009	Gross receipts normally less than $25,000	Gross receipts are greater than $25,000 and less than $500,000 AND assets are less than $1.25 million	Gross receipts greater than or equal to $500,000 OR assets greater than or equal to $1.25 million
2010	Gross receipts normally less than $50,000	Gross receipts are greater than $50,000 and less than $200,000 AND assets are less than $500,000	Gross receipts greater than or equal to $200,000 OR assets greater than or equal to $500,000

2008 Form EZ: Includes Schedules A, B, C, E, G, L, N

990 Gap Analysis – The Process

1. Most Recent Tax Return data from ProSystem fx Tax or paper tax returns
2. Process prior year tax data through the SD Gap Analysis Programs
3. Generate
   - Gap Analysis Spreadsheet
   - Required Action by Priority Code
   - Sequence Report by Form and Schedule with Action Codes
4. Compile 2008 Form 990 Gap Analysis Report
5. Review with Client

5 Part Gap Analysis Report - Contents

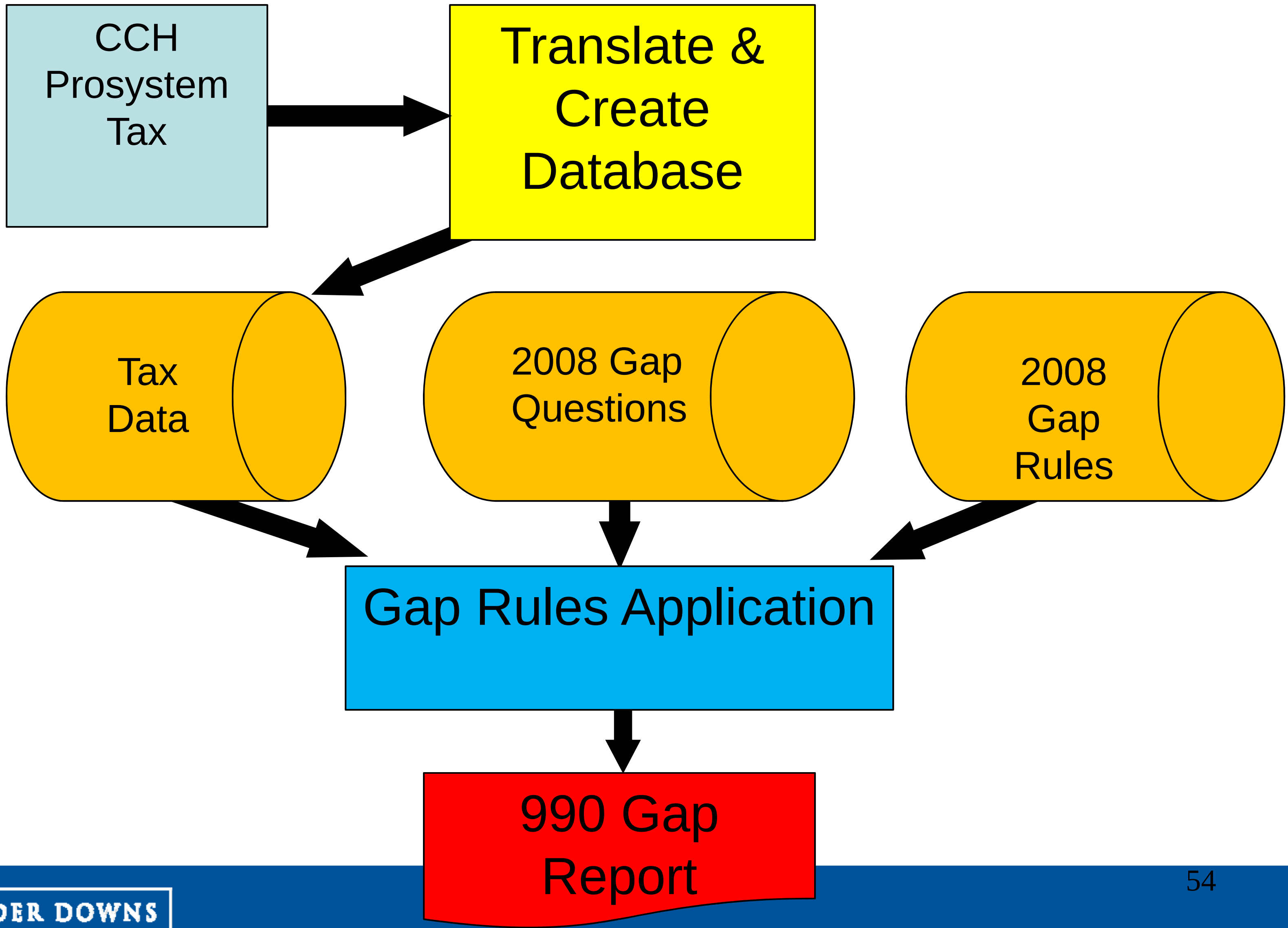
- Redesigned Form 990 Overview
- Discussion of Key Areas of the Redesigned Form 990
- Identification of Gaps in the Core Form
- Identification of Required Activity on Related Schedules
- Summary Plan of Action Steps to Consider

2008 Form 990 GAP Analysis
Prepared on behalf of

Table of Contents

Form 990	Return of Organization Exempt from Income Tax
Schedule A	Public Charity Status and Public Support
Schedule B	Schedule of Contributors
Schedule C	Political Campaign and Lobbying Activities
Schedule D	Supplemental Financial Statements
Schedule F	Statement of Activities Outside the U.S.
Schedule G	Supplemental Information Regarding Fundraising and Gaming Activities
Schedule I	Grants & Other Assistance to Organizations, Governments and Individuals in the U.S.
Schedule J	Compensation Information
Schedule K	Supplemental Information on Tax Exempt Bonds
Schedule L	Transactions with Interested Persons
Schedule M	Non-Cash Contributions
Schedule N	Liquidation, Termination, Dissolution or Significant Disposition of Assets
Schedule O	Supplemental Information to Form 990
Schedule R	Related Organizations & Unrelated Partnerships
Form W-2G	Certain Gambling Winnings
Form W-2	Wage and Tax Statement
Form 1099-MISC	Miscellaneous Income
Form 8886-T	Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction
Form 8282	Donee Information Return
Form 1098-C	Contributions of Motor Vehicles, Boats & Airplanes
Form 4720	Return of Certain Excise Taxes Under Chapters 41 and 42 of the Internal Revenue Code

990 Gap Analysis – The Automation



Rules Table

Example:

					GAP	
SD – ID#	**Sheet**	**Box**	**Operand**	**Value**	**Yes**	**No**
XXX-03.01.00	1	66	=	3		X

Using the data from tax year 2006, if the value in box 66 of Sheet 1 is equal to “3”, this is not a gap issue.

990 Gap Analysis Report

2008 990 Form					GAP						
SD 990 ID No	Section	Page	Question	Description	Yes	No	Priority Code	Action Code	Responsible Party	Action Due Date	Notes
COR.03.01.00	Part IV	3	1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?		X	A	C			
COR.03.01b				Is the organization a 509(a)(3) supporting organization?	X		A	C			
COR.03.03	Part IV	3	3	Did the organization engage in direct or indirect political campaign activities on behalf of, or in opposition to, candidates for public office?	X		B	PR			
COR.03.04.00	Part IV	3	4	501(c)(3) organizations: Did the organization engage in lobbying activities?	X		B	PR			
COR.03.04.01	Part IV	3	4	501(c)(3) organizations. Did the organization engage in lobbying activities?	X		B	PR			
COR.03.05.00	Part IV	3	5	Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax?		X	A	C			
COR.03.06.01	Part IV	3	6	Did the organization maintain any donor-advised funds?		X	A	D			
COR.03.06.02	Part IV	3	6	Did the organization maintain any accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts?	X		B	D			
COR.03.07	Part IV	3	7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures?	X		A	D			
COR.03.08	Part IV	3	8	Did the organization maintain collections of works of art, historical treasures, or other similar assets?	X		B	D			

PRIORITY CODES

A – Action Prior XX/XX/XX

B – Action During Tax Year

C – Action After XX/XX/XX

ACTION CODES

C – Compliance

D – Data/Information Gathering

P – Policy Making

PR – Processes and Procedures

SCHNEIDER DOWNS

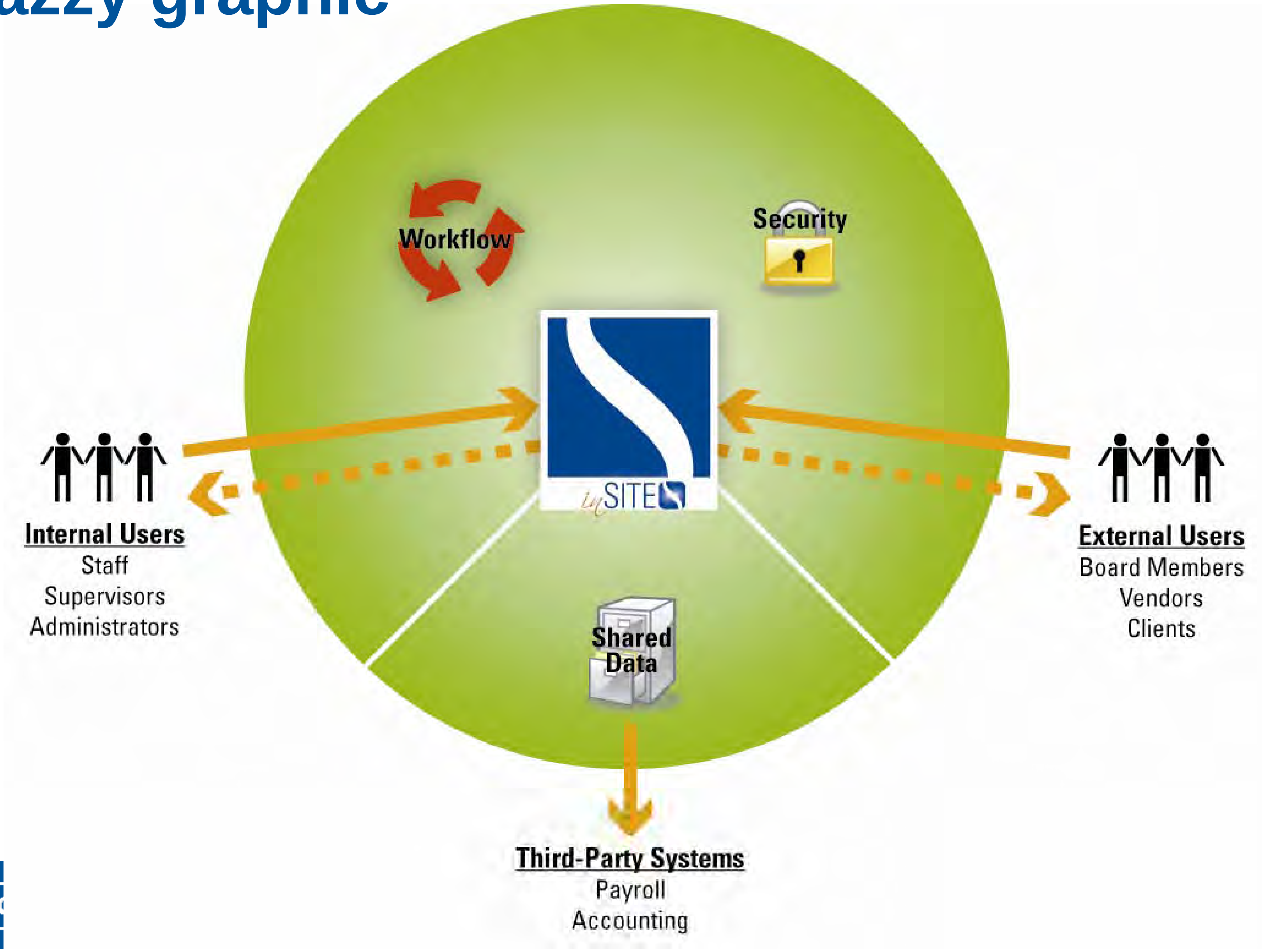
SD inSITE Report Portal

How can this help you?

What is inSITE?

- **Web based application hosted by Schneider Downs**
  - Eliminate the complexity of software
- **Easily exports data to other systems**
  - Payroll
  - Expenses
  - Payables for purchase orders & payables
  - ABRA, ADP, Ceridian, Paychex, MIP, MAS500, etc…
- **Web portal for communications**
  - Provides a common place for getting data in and out of an organization
  - Data from inSITE can easily be exported to other system

Snazzy graphic



What is inSITE?

“Quite simply, SD inSITE is a secure technology that allows organizations to get information in, get information out and share information with employees, management, board members, customers and vendors.”

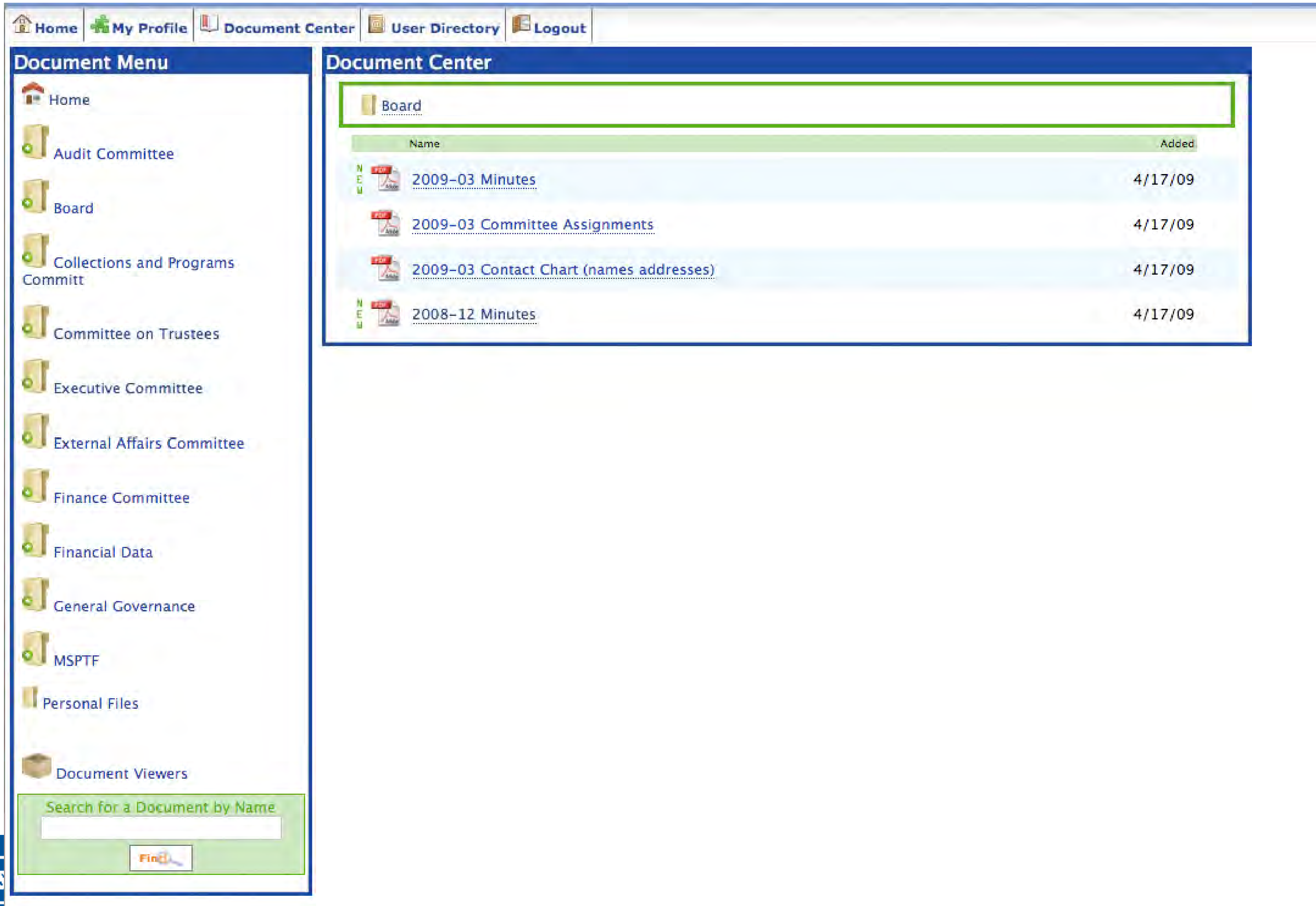
The Document Portal

- Developed originally for Schneider Downs
- Allows for the secure distribution of documents
- Easily manage access, expiration of documents
- Reportable
  - Unviewed documents
  - Document access by user

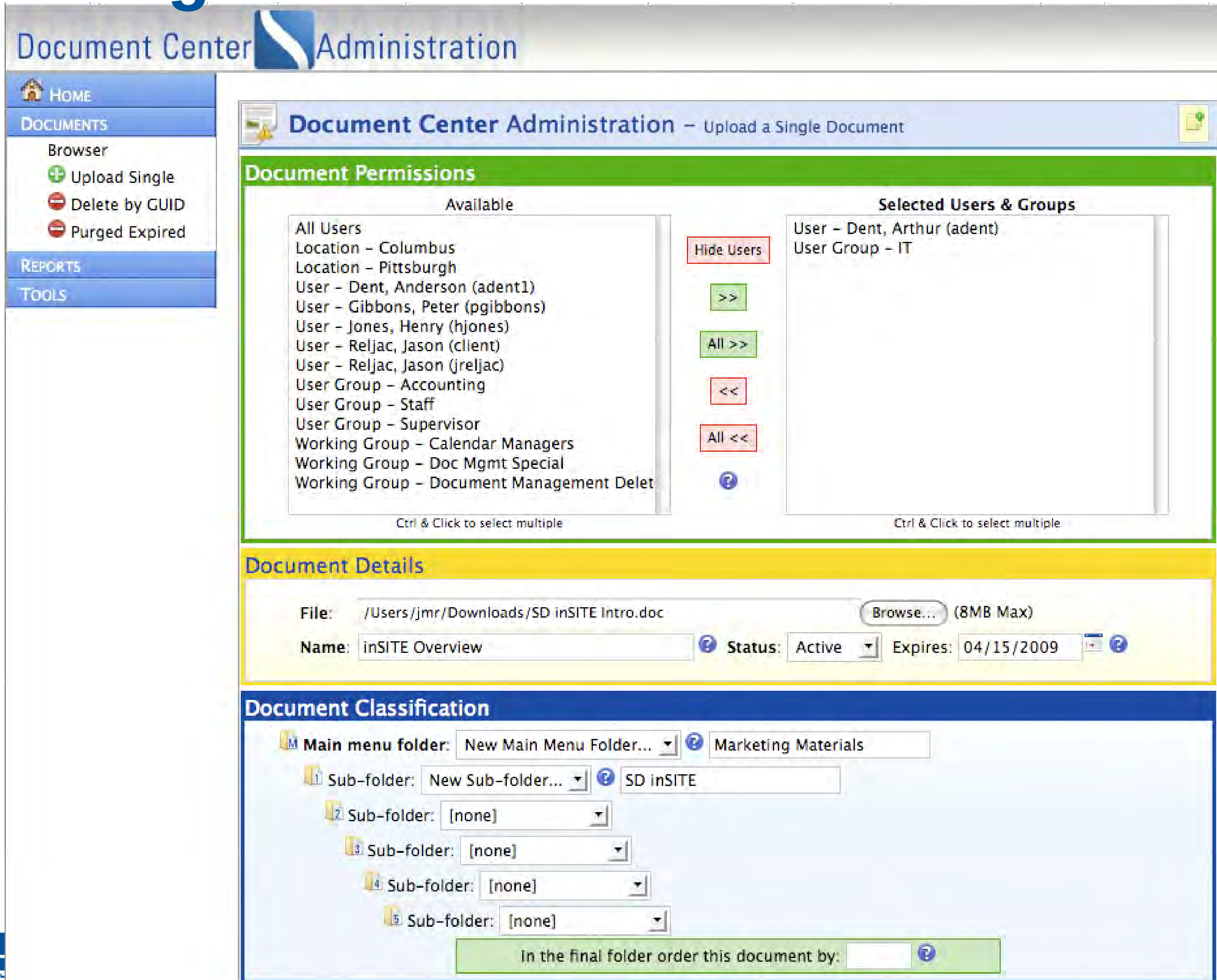
The Document Portal

- Tax documents that need reviewed
  - 990
- Financial reports
- Personnel reports
- Board related materials
  - Meeting agendas
  - Meeting minutes
  - Calendar of meetings and events
  - Organizational documents – by-laws, etc…

Viewing Documents



Adding a Document

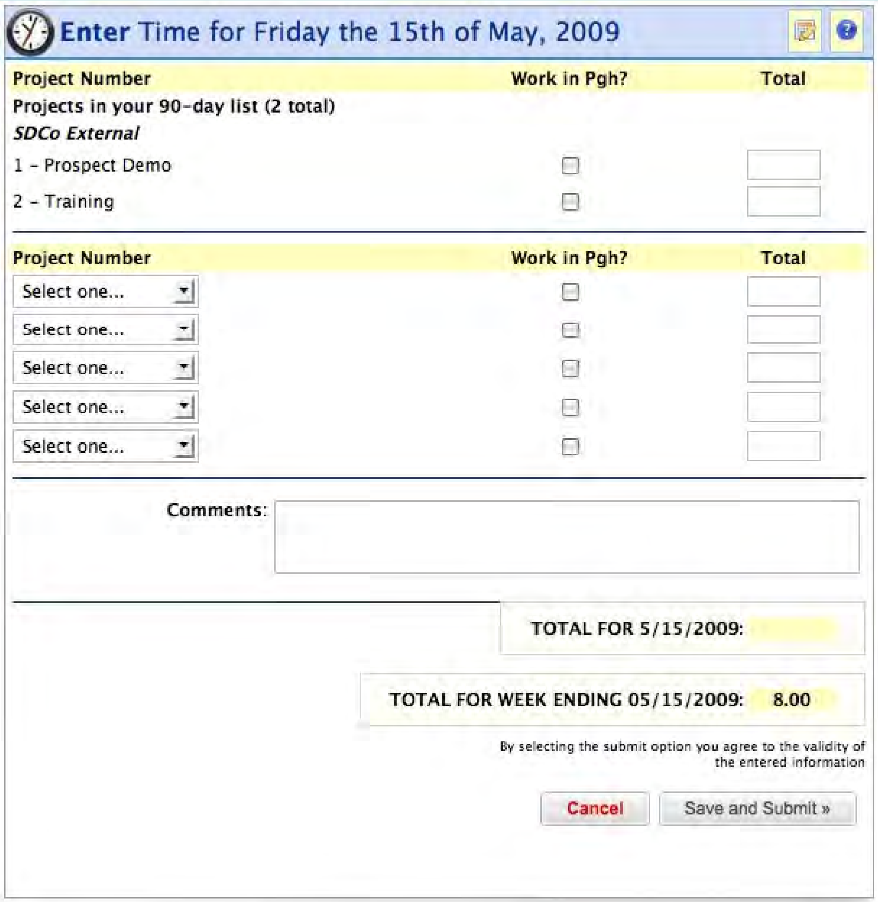


It is a fit for your organization if:

- Uses a time consuming or paper driven process for the secure distribution of reports to board members or company management
- Makes use of an antiquated paper process for employee evaluations
- Tracks hours worked against multiple projects/programs/grants
- Has multiple locations or a mobile workforce
- Tells you getting time and expenses is painful

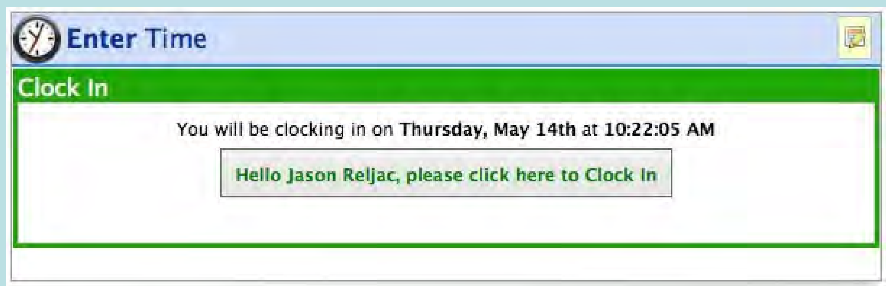
Time Entry Options

Time Entry for Project/Grant Users



Basic Time Entry

Time Clock



What is offered

- **Time Entry**
  - Time Clock
  - Time in by Shift
  - Time in Block
  - Time in by Project
  - Time in for Clients
  - Payroll Entry
  - Single Time Entry
- Time Export
- Time Approval
  - By Detail
  - By Summary
  - For Client Time
- Expense Reporting
  - Expense Entry
  - Expense Approval
- inSITE Reports
- Tickler
- Employee PTO
  - Request
  - Approval
- Inventory Requisition
- Client Database
- **Document Portal**
- inSITE Reviews
- inSITE Administration
- Work in Progress Calendar

Questions?

Sage Knowledge Sync

Alerts for Nonprofits

Sage KnowledgeSync

Alerts for Nonprofits

Sage KnowledgeSync allows you to monitor critical time sensitive information within an application, identifies conditions that require your attention ***and*** response and notifies you about them.

www.sageknowledgesync.com

SAGE KNOWLEDGESYNC by Vineyardsoft Corporation

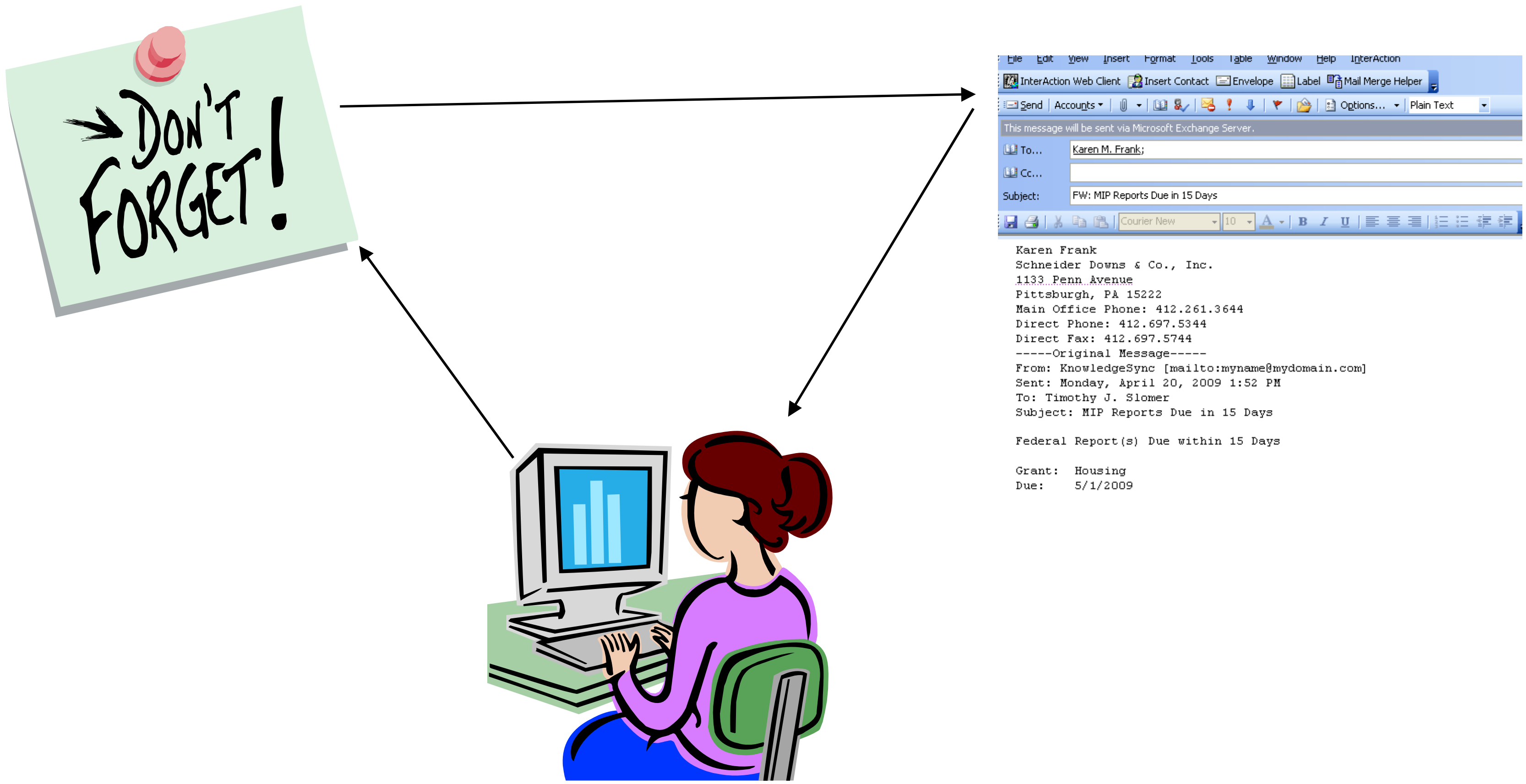
Sage KnowledgeSync
Alerts for Nonprofits

- *Action*: Uses a rules-based engine to perform advanced data analysis and execute pre-determined procedural workflow as a response to these actions.

- *Result*: Organizations increase their daily operational efficiency, improve their management of transactional “exceptions”, and reduce “data latency”.

Sage KnowledgeSync

Alerts for Nonprofits



Sage KnowledgeSync
Alerts for Nonprofits

- Possible Applications:
  - When you are approaching 95% of your total budget
  - When a change is made to vendor information from another software package (Andar, Rainbow, Donor Perfect, Razors Edge)
  - When an employee is approaching their anniversary date
  - When a grant report is coming due
  - Operating System Monitoring
  - You need to generate a report on a schedule

Sage KnowledgeSync
Alerts for Nonprofits

You Can Get Alerts in the Form Of:

- ✓ Email
- ✓ Pager/PDA
- ✓ Screen Pop
- ✓ Fax
- ✓ Cell Phone
- ✓ Web – Dash Board Alerts

Sage KnowledgeSync
Alerts for Nonprofits- Pricing

License Type	License Cost	Annual M & S
Enterprise Edition One Connection Alerts	$1,799	$399
Add Reports Module	$499	$99
Add Workflow Module	$999	$199
Enterprise Edition Full Feature One Connection (Includes Alerts, Reports and Workflow)	$3,295	$650
Upgrade One Connection	$1,999	$399
Enterprise Edition Full Feature Unlimited Connections (Includes Alerts, Reports and Workflow for unlimited applications/ databases. Upgrading to 4 connections puts you at unlimited)	$8,695	$1,700
Client Access License (Optional) (allows remote administration of the KnowledgeSync server)	$495	$99

Sage Insights

The Road Ahead

News from Insights

GETTING BACK TO THE BASICS

- Updating the 990 Form
- Updating the Drill Down Functionality
- Improving the Grant Management Module
- Employee E-mail
- GASB Improvements
- Payroll Module Enhancements
- Ideascope
- Version 10.2 fixes 200+ defects

Schneider Downs Help Desk

- 1-866-999-SDCO (7326)
- All calls are tracked
- Priority assignment
  - Low
  - Normal
  - High
  - Emergency – Consultant call back within an hour
- Wait time is reduced
  - No more tracking down a consultant yourself
- Almost 100% live coverage of phone line

Schneider Downs Insights

Please consider subscribing to Schneider Downs News:

- News and Insights
- Automobile
- Construction
- Manufacturing
- **Nonprofit**
- State and Local Tax (SALT)
- OnPoint Newsletter
- International Financial Reporting Standards (IFRS)

Visit: https://www.schneiderdowns.com/subscribe

Open Forum

Thank You for Attending!

Schneider Downs Consulting

1133 Penn Avenue
Pittsburgh, PA 15222
412.261.3644

41 S. High Street, Suite 2100
Columbus, OH 43215
614.621.4060

www.schneiderdowns.com