

Infinite Visions Enterprise Edition (IVEE)

Security

Student Guide

COURSE PREREQUISITES

- None

COURSE OVERVIEW

- The first layer of security for the infinite Visions Enterprise Edition Accounting software is setup in the Infinite Visions Administration application and is used to identify Entity, Connection Groups, Users, and basic module restrictions.
- The Security module within the Accounting application is used to further refine the level of access for users at the individual user level.

Notes Legend



NOTE



TIP



BEST PRACTICE



WARNING

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This document applies to Infinite Visions Enterprise Edition Accounting version 2017.4 software. The data used to illustrate the reports and windows may include names of individuals, companies, brands, and products. All these names are fictitious; any similarities to actual names are entirely coincidental. Further, any illustrations of report formats or window images are examples only and reflect how a typical customer would install and use the product.

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Table of Contents

P&P SECURITY OPTIONS	8
Overview.....	8
RESTRICTIONS	14
Overview.....	14
ASSIGNED ACCOUNTS.....	15
Overview.....	15
WH ACCESS	16
Overview.....	16
AVAILABLE DACS	17
Overview.....	17
BANK ACCOUNTS	18
Overview.....	18
GL SECURITY OPTIONS.....	19
Overview.....	19
ACCESS LOG	22
CHANGE LOG.....	23
Overview.....	23
ERROR LOG	23
Overview.....	23
WORKFLOW CONFIGURATION.....	25
DISTRIBUTED ACCOUNTABILITY CENTERS (DACs).....	25
Overview.....	25
DAC Information	25
PO Heading Information	28
PO Message Information.....	29
DAC Account Masks.....	30
School Interoperability Framework (SIF)	31
Copy Purchase Order Information.....	32
DAC ACCOUNTS.....	33
Overview.....	33

Assign by Individual Account Mask.....	33
Assign Individual Account.....	34
Overview.....	35
Alternate Approvers	37
APPROVER ACCOUNTS	38
Copy Approval Setup	39
REASSIGN APPROVER	40
TRANSACTION JOURNAL ENTRY APPROVERS	41
EMAIL SETTINGS.....	42
EMAIL ALERTS AND JOBS	44
Overview.....	44
Activate Email Alert	45
CHANGE LOG EMAIL ALERTS	45
Overview.....	45
Activate Change Log Email Alert.....	46
PORTAL DEFAULT SETTINGS.....	47
Overview.....	47
USER DEFINED FIELDS (UDFS).....	47
Overview.....	47
Define a User Defined Field	47
PAYROLL USER ROLES	49
Overview.....	49
Define Payroll User Role	49
Assign Payroll User Roles.....	55
HISTORY CONNECTION GROUPS	55
Overview.....	55
INVOICE APPROVERS.....	56
Overview.....	56
PROVISIONAL DATABASE.....	57
Overview.....	57
Create Provisional Database.....	58
LEAVE APPROVAL WORKFLOW	59
Overview.....	59
LEAVE APPROVAL APPROVERS.....	59

Overview.....	59
FTP TEMPLATE SETUP	60
Overview.....	60
USER DEFINED FORMS.....	61
Overview.....	61
Set Form Image.....	63
Set Allowed Groups	64
Set up Approvers	64
Publish User Defined Form	65
Email Employees.....	66
USER DEFINED FORMS APPROVAL	66
Overview.....	66
HR/PR USER DEFINED FORM COMPLETION	67
SECTION SUMMARY	68
 REPORTS.....	 69
CONNECTION GROUP LISTING	69
Overview.....	69
MODULE LISTING.....	70
USER ROLE LISTING.....	70
USER LISTING	72
 DAC FILTERING	 73
General Ledger	74



User Security

Section Topics

- [P&P Security Options](#)
- [HR/PR Security Options](#)
- [Restrictions](#)
- [Assigned Accounts](#)
- [WH Access](#)
- [Available DACs](#)
- [Bank Accounts](#)
- [GL Security Options](#)
- [Access Log](#)
- [Change Log](#)
- [Error Log](#)

Introduction

Initially, users are added in the Infinite Visions Administration application and then display in the Users grid in Infinite Visions > Security > User Security.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Show User Requisition Accounts	Select this command to create a report of accounts assigned to the selected user. Only accounts assigned to a Non-Central DAC with the Allow Req (Security > Workflow Configuration > DAC Accounts) checkbox marked are included. However, if a user is assigned to a Central site DAC, they have access to all accounts regardless if they are assigned accounts.
Copy Selected Records to Next Year	Select this command to copy selected user records and their security settings from the current year to the next fiscal year (if one exists). For more information, refer to the Help system.

The User Security menu item is used to further refine Infinite Visions Accounting access levels. In the Add/Edit User Security window, enable each user access to specific functions on each of the following tabs:

- P&P Security Options
- HR / PR Security Options
- Restrictions
- Assigned Accounts
- WH Access
- Available DACs
- Bank Accounts
- GL Security Options

P&P SECURITY OPTIONS

Security > User Security

Overview

On the P&P Security Options tab, mark the checkbox for each function to assign user access within the Purchasing & Payables module.

Edit User Security

User Information

User ID:

Name:

P&P Security Options

HR / PR Security Options

Restrictions

Assigned Accounts

WH Access

Available DACs

Bank Accounts

GL Security Options

PO Approval Limit:

Invoice Over PO Limit:

☐ Limit to expense accounts on requisitions and invoices

☐ Limit to user's own requisitions/invoices

☐ Allow signature printing on purchase orders

☐ Allow signature printing on checks

☐ Allow invoice payments without purchase orders

☐ Allow unpost of a voucher that has checks written

☐ Allow P&P Central Site user to override Req approvals

☐ Allow P&P Central Site user to override Invoice approvals

☐ Allow Req/PO Copy To Next Year

☐ Allow override of Maintain Budget Limit

☐ Allow Add Blanket PO Line

☐ Filter Req accounts by DAC (P&P Central Site Users)

☐ Allow Approver to edit account codes on WH Reqs

Override Signature

Signature Name:

☐ User is a Buyer

☐ Allow P-Card/EFT Payee

☐ Allow to post AP Vouchers

☐ Accept Proposed Vendor

☐ Allow editing of Vendor SSN

☐ Allow Exp Reimb. Entry for All Users in DAC

☐ Allow Receive All

☐ Allow Revenue accounts for AR Payments

☐ Limit User to only Revenue accounts for AR Payments

☐ Allow ICM Document Search

☐ Allow to edit account codes on Invoices

Staff View:

DAC:

Employee:

☐ Close this dialog after update?

Mode: Edit - Record 1 of 1

P&P Security Options tab

OPTION	DESCRIPTION
PO Approval Limit	Enter a dollar amount. This enables the user to approve purchase orders up to the amount entered.

OPTION	DESCRIPTION
Invoice Over PO Limit	<p>Enter a percentage to allow the user to enter an invoice for the total amount plus the extra percentage. If a percentage is entered, the system requires the invoice total plus any prior payments be less than the total purchase order amount plus the extra percentage.</p> <p>In the additional blank field, enter a maximum PO dollar amount the user can approve. For example, a user can be authorized to approve invoices up to 10% over the PO but not to exceed \$500. If the PO Approval Limit field is \$0.00, the percentage does not apply.</p>
Override Signature	From the dropdown, select the applicable user. The selected user signature is used as the PO signature for all POs regardless of the signature specified for the user's DAC.
Limit to expense accounts on requisitions and invoices	If marked, only expense accounts display in the Account dropdown for requisitions and invoices. If the checkbox is disabled, the system displays the accounts based on the accounts assigned to the user and DAC.
Limit to user's own requisitions/invoices	Mark the checkbox if the AP/WHS Control Panel should display only requisitions created by the user.
Allow signature printing on purchase orders	Mark the checkbox to enable the user to print signatures on checks.
Allow invoice payments without purchase orders	Mark the checkbox to enable the user to process an invoice payment without a purchase order.
Allow unpost of a voucher that has checks written	<p>Mark the checkbox to enable the user to unpost vouchers already posted to the General Ledger even if the voucher already has checks written.</p> <p>NOTE Assign this option with caution. A user with this capability can delete posted checks from the system.</p>
Allow P&P Central Site user to override Req approvals	<p>Mark the checkbox to enable the user to override the requisition approval process. If a Purchasing & Payables Site user selects a requisition and runs the Quick Approval command, the requisition is ready to be a PO. The Approval Log display all approvers who should have seen the requisition and the ID of the user who approved it.</p> <p>This option applies to both Accounts Payable and Payroll vouchers.</p>

OPTION	DESCRIPTION
Allow P&P Central Site user to override Invoice approvals	Mark the checkbox to enable the user to override/push approvals when another user is out.
Allow Req/PO Copy to Next Year	Mark the checkbox to allow the user access to the Copy Requisition/PO to Next Year command in Purchasing & Payables > Purchasing > Control Panel > Actions menu. If this option is disabled, the command is grayed out.
Allow override of maintain Budget Limit	Mark the checkbox to enable the user to override any budget limit restrictions (warning message) for purchase orders and requisitions.
Allow Add Blanket PO Line	Mark the checkbox to allow the user access to the Add Blanket PO Line command in the Add/Edit Invoice window in Purchasing & Payables > Payables > Invoice Processing > Actions menu.
Filter Req accts by DAC (P&P Central Site Users)	Mark the checkbox to restrict the accounts in the dropdown to the selected DAC when adding requisitions.
Allow Approver to edit account codes on WH Reqs	Mark the checkbox to enable an approver to edit account codes on warehouse and purchasing requisitions.
User is a Buyer	Mark the checkbox to designate the user as a buyer. All users with this checkbox marked display in the Buyer dropdown in Purchasing & Payables > Purchasing > Control Panel > Add/Edit Requisition.
Allow P-card/EFT Payee	Mark the checkbox to enable the user to select an alternate payee for invoices.
Allow to post AP Vouchers	Mark the checkbox to allow the user to access the Post and Unpost commands from the Actions menu. If not enabled, the Post and UnPost commands are grayed out.
Accept Proposed Vendor	Mark the checkbox to designate the user as someone who can accept proposed vendors during the requisition process. If disabled, the Accept Proposed Vendor command is grayed out from the Edit Requisitions window in Purchasing & Payables > Purchasing > Control Panel > Actions menu.
Allow editing of Vendor SSN	Mark the checkbox to enable the user to view and/or edit the vendor SSN in Purchasing & Payables > Vendors > Vendor Maintenance. If the checkbox is disabled, the user does not see SSN information. The system default is disabled.
Allow Exp Reimb Entry for All Users in DAC	Mark the checkbox to enable the user the ability to enter reimbursement requests for other users in the DAC. The default is disabled.

OPTION	DESCRIPTION
Allow Receive All	Mark the checkbox to enable the user access to the Receive All Remaining Items command in Purchasing & Payables > Purchase Order Receiving > Actions menu. If disabled, the command is grayed out. The default is disabled.
Allow Revenue Accounts for AR Payments	Mark the checkbox to allow revenue accounts assigned in Security > Workflow Configuration > DAC Accounts to be available for AR Payments in Receivables > Payments > Payment Processing.
Limit User to only Revenue accounts for AR Payments	Mark the checkbox to limit the user to only revenue accounts in Receivables > Payments > Payment Processing. This checkbox is only active if Allow Revenue Account for AR Payments is marked.
Allow TCM Document Search	If the district is using the Tyler Content Manager (TCM) application (separate license key required), mark the checkbox to enable the user to have access to the Document Search command in the Help menu. The checkbox is only active if the TCM URL is entered in General Ledger > Configuration > General Ledger Default Settings > Transparency tab.
Allow to edit account codes on Invoices	Mark the checkbox to enable a General Ledger site user to have access to the Show All Journal Entry Requests checkbox in the My Workflow > Journal Entry Approval window. This checkbox only displays if the Use Enhanced JE Approval Process checkbox is marked in General Ledger > Configuration > General Ledger Default Settings.
Allow override of Maintain Budget Limit	Mark the checkbox to enable the user to override any budget limit restrictions (warning message) for purchase orders and requisitions.
Staff View	This field is used ONLY with the IOS mobile App. From the dropdown, select the applicable option (My Staff, All Departments, None).
DAC	From the dropdown, select the DAC associated with the user. This is a required field.
Employee	If the district is using iVisions ESS and My Workflow and the user can approve requisitions, select the applicable employee. This selection links the employee to the DAC and enables the system to filter the requisitions for each user to approve.

HR / PR SECURITY OPTIONS

Security > User Security

Overview

On the HR / PR Security Options tab, mark the checkbox for each function to assign user access within the Human Resources and Payroll module.

Edit User Security

User Information
User ID: sa
Name: sa

P&P Security Options | **HR / PR Security Options** | Restrictions | Assigned Accounts | WH Access | Available DACs | Bank Accounts | GL Security Options

Payroll User Role: Full Access
☐ HR UDF Permission
☐ PR UDF Permission
PAR Security Role: Full Access
☐ Allow user to skip PAR approver
☐ Show All DAC PARs
☐ Send PIN Email
Web Applicant User ID:
Default Group:
☐ Group Locked
☐ Attendance Clerk
☐ Allow Show All User Defined Forms Option
Trip Tracker User ID:
☐ Allow to post PR Vouchers
User Persona:


☐ Close this dialog after update?

Mode: Edit - Record 1 of 1

OK Cancel Help

- *HR / PR Security Options tab*

OPTION	DESCRIPTION
Payroll User Role	<p>From the dropdown, select the Payroll User Role with the level of access to assign to the user. A user must be assigned a Payroll User Role to access Payroll > Employees > Employee Maintenance and Payroll > Employees > Employee Deductions and Benefits. If a user does not have a Payroll User Role assigned, the following message “Cannot display this menu item until you are setup with a payroll user role in user Security” displays when trying to access the menu item.</p> <p>Payroll User Roles are defined Security > Workflow Configuration > Payroll User Roles and provide field level user security for the Employee Maintenance and Employee Positions and Pay window.</p>
HR UDF Permission	This option is no longer used. For more information about securing user defined fields on PARs, refer to Security > Workflow Configuration > PAR Security.
PR UDF Permission	This option is no longer used. For more information about securing user defined fields on PARS, refer to Security > Workflow Configuration > PAR Security.
PAR Security Role	<p>If the district is using PARs in iVisions, and is implementing field level security for PARs, from the dropdown, select the PAR Security Role for the user.</p> <p>PAR Security Roles are defined in Security > Workflow Configuration > PAR Security Roles.</p>
Allow user to skip PAR Approver	If the district is using PARs in iVisions Online Workflow, authorize a user to approve a PAR for other approvers. For example, if the Human Resources manager should have the ability to override the approval for all PARs in process. If marked, the Skip Approval button displays on the HR/PR PAR Completion window for the user in iVisions Online Workflow.
Show All DAC PARs	Mark the checkbox if a non-PR/HR Central Site user can view all PARs assigned to their DAC or just the PARs they enter in iVisions Online Workflow.
Web Applicant User ID	Access to Pay Change and Termination PARs is not controlled with this option. Non-PR/HR Central Site users still only see Pay Change and Termination PARS they entered.
	If applicable, enter WinOcular’s user ID for the user. This ID controls the type of WinOcular documents the user can review.
Default Group	From the dropdown, select a default employee group for the user. If a group is selected, it displays as the default in any Payroll or Human Resources window with the Group field visible.

OPTION	DESCRIPTION
Group Locked	If marked, the dropdown displays the selected Default Group and locks the field in all windows the employee can access. If the checkbox is disabled, the user can change their default group in each window or they can select their own default group using Set Preferences.
Attendance Clerk	<p>Mark the checkbox to enable the user to work with the leave plan request for the other users of their DAC. If marked, the attendance clerk can work with the following iVisions Workflow windows:</p> <ul style="list-style-type: none"> iVisions Online Workflow > My Workflow > Attendance (Approval window, Calendar View, Submit leave window) iVisions Online Workflow > My Workflow > HR > Attendance > Employee Leave Plans iVisions Online Workflow > My Workflow > HR > Attendance > Employee Leave Plan Requests iVisions Workflow > My Workflow > PR > Reports > General > Employee Leave Plan Reports <p> A user with Attendance Clerk marked cannot also be designated as a Supervisor. If they are, delete their Supervisor record before assigning a user as an Attendance Clerk.</p>
Allow Show All User Defined Forms Option	Mark the checkbox to enable the approver to view all submitted user defined forms regardless of status or current step in the approval process.
Trip Tracker User ID	This field is for Versatrans users only. Enter the ID. Incoming web requests reference the number for all encumbrance and invoice functions.
Allow to post PR vouchers	Mark the checkbox to enable the user to post PR vouchers. If the checkbox is disabled, the Post and Unpost commands are grayed out on the Actions menu in the Purchasing & Payables > Payables > Voucher Processing window.
User Persona	For iVisions Users. From the dropdown, select the applicable option. If the user has the Workflow User Only checkbox marked in Infinite Visions Administration > Users, this field defaults to General User and the field is locked.

RESTRICTIONS

Security > User Security

Overview

The Restrictions tab lists the Infinite Visions modules and identifies user access as noted below. To view the module listing, click in the white window.



The listing is read-only. Any changes to the module settings must be made in Infinite Visions Administration.

Restrictions tab

ICON	DESCRIPTION
	Denotes Full Access to the menu and/or menu items
	Denotes Read-Only access to the menu and/or menu items
	Denotes No Access to the menu and/or menu items

ASSIGNED ACCOUNTS

Security > User Security

Overview

On the Assigned Accounts tab restrict the user to working only with the accounts or account masks entered/selected in the Assigned Account Masks grid. The listed accounts are the only accounts the user can access in the Control Panel, Budget Journal Entry, Account Detail, Journal Detail (By Entry is locked if not GL site), and

GL Report Writer. If there are no accounts shown on this tab, there are no user level restrictions, just DAC restrictions.

The screenshot shows the 'Edit User Security' dialog box with the 'Assigned Accounts' tab selected. The 'User Information' section at the top shows 'User ID: sa' and 'Name: sa'. Below this is a row of tabs: 'P&P Security Options', 'HR / PR Security Options', 'Restrictions', 'Assigned Accounts' (selected), 'WH Access', 'Available DACs', 'Bank Accounts', and 'GL Security Options'. The main area is titled 'Assigned Account Masks' and contains a table with one row and one column labeled 'Account Mask'. Below the table is a 'Get User Accounts From:' dropdown menu with 'sa' selected and a 'Copy' button. At the bottom right, there is a checkbox 'Close this dialog after update?' and buttons for 'OK', 'Cancel', and 'Help'. The status bar at the very bottom shows 'Mode: Edit - Record 1 of 1'.

Assigned Accounts tab



Accounts can also be assigned by copying assigned accounts from another user. From the Get User Accounts From dropdown, select the user. Click Copy. A message displays stating the copied accounts replace all existing accounts.

WH ACCESS

Security > User Security

Overview

The WH Access tab is used to specify the warehouse location(s) from which the user can order. If a warehouse user, the list also specifies the warehouse(s) from which the user can ship. Add a location by clicking in a blank row in the Warehouse Locations grid. From the dropdown, select the warehouse.

Edit User Security

User Information

User ID: sa

Name: sa

P&P Security Options

HR / PR Security Options

Restrictions

Assigned Accounts

WH Access

Available DACs

Bank Accounts

GL Security Options

Warehouse Locations

Warehouse
▶ Athletic's
Food Service
Main
*

◀◀

Mode: Edit - Record 1 of 1

▶▶

☐ Close this dialog after update?

OK

Cancel

Help

WH Access tab

AVAILABLE DACS

Security > User Security

Overview

The Available DACs tab is used to associate the user to any additional DACs. If there are not any DACs selected, the user is only associated with the DAC identified on the [P&P Security Options](#) tab. Add a DAC to the DACs grid by clicking in a blank row. From the dropdown, select the DAC.

The screenshot shows the 'Edit User Security' window. At the top, there's a 'User Information' section with fields for 'User ID' (sa) and 'Name' (sa). Below this is a tabbed interface with several tabs: 'REP Security Options', 'HR / PR Security Options', 'Restrictions', 'Assigned Accounts', 'VH Access', 'Available DACs' (which is currently selected), 'Bank Accounts', and 'GL Security Options'. The 'Available DACs' tab displays a table with a single row containing 'DAC' and an asterisk '*'. At the bottom of the window, there's a status bar indicating 'Mode: Edit - Record 1 of 1' and three buttons: 'OK', 'Cancel', and 'Help'.

Available DACs tab

BANK ACCOUNTS

Security > User Security

Overview

The Bank Accounts tab is used to restrict user access to specific bank accounts in Check Manager, Deposit Manager, Bank Statements, and Bank Account Transfer Utility. The Bank Account dropdown for each of these items display only the accounts selected on this tab. If there are no bank accounts listed on in the Bank Accounts grid, the user has access to all bank accounts.

For each bank account, allow users the ability to print or void checks and assign to vouchers in Voucher Processing (Payroll and Accounts Payable) by marking the checkbox as applicable for the following:

- Expense
- Payroll
- PR Ded
- Manual
- AP Voucher
- PR Voucher

Edit User Security

User Information

User ID:

Name:

P&P Security Options
HR / PR Security Options
Restrictions
Assigned Accounts
WH Access
Available DACs
Bank Accounts
GL Security Options

Bank Accounts

Bank Account	Expense	Payroll	PR Ded.	Manual	AP Voucher	PR Voucher
▶ US Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
County Treasurer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unifund Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unifund Bank 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mode: Edit - Record 1 of 1

OK

Cancel

Help

☐ Close this dialog after update?

GL SECURITY OPTIONS

Overview

Edit User Security

User Information

User ID:

Name:

P&P Security Options | **HR / PR Security Options** | Restrictions | Assigned Accounts | WH Access | Available DACs | Bank Accounts | GL Security Options

☒ Allow posting of deposits to the general ledger
☒ Allow posting of AR deposits to the general ledger
☐ Allow editing of account numbers
☐ Allow Budget Importing to inactive accounts
☒ Allow reprinting of checks
☐ Allow JE Rollback
☒ Allow GL Approval Override

JE Enhanced Approval Options


☒ Allow User to Change JE Date
☒ Allow User to Change Account Codes and Account Code Descriptions
☒ Allow User to Change Amounts
☒ Allow User to Change Memo
☒ Allow User to Change Reference

☐ Close this dialog after update?

Mode: Edit - Record 1 of 1
OK
Cancel
Help

GL Security Options tab

OPTION	DESCRIPTION
Allow posting of deposits to the general ledger	Mark the checkbox to enable the user to post deposits to the general ledger. If not enabled, the user can create deposits, but not post them.
Allow posting of AR deposits to the general ledger	Mark the checkbox to enable the user to post accounts receivable deposits to the General Ledger. If not enabled, the Post and Un-Post commands are grayed out and not available to the user in Receivables > Payments > Deposit Processing > Actions menu.
Allow editing of account numbers	This option is available only for users in Iowa, Illinois, Rhode Island, and South Carolina. Mark the checkbox to allow the user to edit account numbers with transaction activity in General Ledger.

OPTION	DESCRIPTION
Allow Budget Importing to inactive accounts	Mark the checkbox to allow user access to the Import to Inactive Accounts checkbox (Import Criteria) on the General Ledger > Budgeting > Import/Export Utilities > Budget Import window.
Allow reprinting of checks	<div> Mark the checkbox to allow the user to reprint checks with a status of Printed and Not Printed in General Ledger > Banking > Check Manager. </div> <div>  Checks with a status of Void cannot be reprinted. </div>
Allow JE Rollback	This option available only to South Carolina users.
Allow GL Approval Override	Mark the checkbox to allow a General Ledger Site user to have access to the Show All Journal Entry Requests checkbox in the My Workflow > Journal Entry Approval window. This checkbox only displays if the Use Enhanced JE Approval Process checkbox is marked in General Ledger > Configuration > General Ledger Default Settings.

The following options display only if the Use Enhanced JE Approval Process checkbox is marked in General Ledger > Configuration > General Ledger Default Settings:

PROCESS	DESCRIPTION
Allow User to Change JE Date	Mark the checkbox to edit the G/L Date.
Allow User to Change Account Codes and Account Code Descriptions	Mark the checkbox to allow the user to select a different account from the Account dropdown and to change the account Description.
Allow User to Change Amounts	Mark the checkbox to allow the user to change the debit and/or Credit amounts.
Allow User to Change Memo	Mark the checkbox to allow the user to edit or change the Memo.
Allow User to Change Reference	Mark the checkbox to allow the user to select a different option from the Reference dropdown.



During the journal entry approval process, the user can make changes as allowed.

ACCESS LOG

Security > Access Log



Tyler suggests restricting Access Log access to the system administrator.

Overview

The Access Log grid is read-only and lists by user every attempt to access menu items in both IVEE and iVisions. The system logs a transaction consisting of the username, time and date, workstation name, menu item name, mode (read only, full access), status (access granted, or access denied), and the user's role name.



The Access Log is cleared during General Ledger Fiscal Year Rollover.

Filter Table

From Date: [Month] [Day] [Year]

To Date: [Month] [Day] [Year]

Size: [10] [20] [50] [100]

Apply Selection

Clear Selection


Access Date	Access Time	Module	User ID	Menu Item	Mode	Status	Computer Name	Workstation Name	Access Log
12-22-17	11:25:54 am	Security	sa	Security Log	Full Access	Access Granted	SA_MH012P1112	PIB0P0A012	Security
12-22-17	11:25:54 am	Security	sa	General Ledger Fiscal Year Rollover	Full Access	Access Denied	SA_MH012P1112	PIB0P0A012	Security
12-22-17	11:25:54 am	Security	sa	General Ledger Fiscal Year Rollover	Full Access	Access Denied	SA_MH012P1112	PIB0P0A012	Security
12-22-17	11:25:54 am	Security	sa	General Ledger Fiscal Year Rollover	Full Access	Access Denied	SA_MH012P1112	PIB0P0A012	Security
12-22-17	11:25:54 am	Security	sa	General Ledger Fiscal Year Rollover	Full Access	Access Denied	SA_MH012P1112	PIB0P0A012	Security

Access Log

FILTER CRITERIA	DESCRIPTION
From Date/To Date	Enter/select a date in each of the fields to specify a date range for the transactions to display in the grid.
User ID	To limit the display of transactions to a single user, select the user from the dropdown.

From the Actions menu, the following command is available:

COMMAND	DESCRIPTION
Delete Access Log	Filter the grid to display the transactions to delete. Select this command to permanently remove records from the Access Log.



This command is not active if the user belongs to a read-only group.

CHANGE LOG

Security > Change Log

Overview

The system automatically tracks any changes made in Employee Demographics, User Defined Fields, ACA Information, Deductions, Deduction/Leave Control, Position and Pay, Direct Deposit (Portal), Position Control, Garnishments, and Vendor information. Change Log entries are also generated with the use of the Employee Setup Wizard and Termination Wizard. Users making changes are prompted to enter a reason for change. The Change Log grid display all changes sorted by user ID.

Change Log

Filter Criteria: From [] To [] User ID [] Data Type [] Apply Selection Clear Selection

ID	User ID	Change Date	Data Type	Field Name	Old Value	New Value	Reason	Record ID	Primary Description	ID.2	ID.1	Data.2

Change Log

FILTER CRITERIA	DESCRIPTION
From Date/To Date	Enter/select a date in each of the fields to specify a date range for the transactions to display in the grid.
User ID	To limit the display of transactions to a single user, select the user from the dropdown.
Data Type	To limit the display to a specific data type, select the applicable option from the dropdown.

ERROR LOG

Security > Error Log

Overview

The Error Log displays a list of all error messages received by users. The ID can be used to look up detail information about the error.

[illegible]

Error Log

FILTER CRITERIA	DESCRIPTION
From Date/To Date	Enter/select a date in each of the fields to specify a date range for the transactions to display in the grid.
User ID	To limit the display of transactions to a single user, select the user from the dropdown.
Error ID	To limit the display to a specific ID, select the ID number from the dropdown.

Workflow Configuration

Section Topics

- Distributed Accountability Centers
 - [DAC Information](#)
 - [PO Heading Information](#)
 - [PO Message Information](#)
 - [DAC Account Masks](#)
 - [SIF](#)
- [Copy PO](#)
- [DAC Accounts](#)
- [Approvers](#)
- [Approver Accounts](#)
- [Copy Approval Setup](#)
- [Reassign Approver](#)
- [Transaction Journal Entry Approvers](#)
- [Email Settings](#)
- [Email Alerts and Jobs](#)
- [Portal Default Settings](#)
- [User Defined Fields](#)
- [Payroll User Roles](#)

Introduction

Prior to using the Infinite Visions Accounting application, there are many items within the Security module to configure. During this training, we'll focus on looking at several menu items affecting Infinite Visions workflow.

DISTRIBUTED ACCOUNTABILITY CENTERS (DACs)

Security > Workflow Configuration > Distributed Accountability Centers

Overview

To enable cost centers for budget control within the district, identify each as a Distributed Accountability Center (DAC) and set up basic information and purchase order information for each site/department.

It is the combination of the DAC information and user access which determines what each user can view and what functions they can perform.

Once the DAC information is entered, identify which accounts each DAC can use. Choose the DAC Account Masks tab to auto assign accounts to the DAC. Refer to the Help system for the DAC window to display which menu items are filtered by DAC.

From the Actions menu, the follow commands are available:

COMMAND	DESCRIPTION
Copy DAC Info	Select this command to copy the PO Heading and Message information and/or copy the approval setup from another DAC.
Update DAC Accounts by Mask	Select this command to update the DAC Account assignments for all DACs with account masks setup in DAC Configuration.

DAC Information





In order to define and use more than 1 DAC, the district must purchase a Distributed Accountability Centers module license. If the district does not have the license, only 1 DAC can be defined.

1. Right-click in the Distributed Accountability Centers grid and select *Add*. The Add Distributed Accountability Center window displays.

DAC Information tab

2. Enter the applicable information on each of the 5 tabs (DAC Information, PO Heading Information, PO Message Information, DAC Account Masks, SIF).

FIELD NAME	DESCRIPTION
DAC Information tab	
DAC Code	<p>Enter the number or name (up to 10 characters) to identify the DAC.</p> <p> Tyler suggests aligning the DAC codes with the location element from the Chart of Accounts.</p>
Description	Enter a description to identify the DAC.

FIELD NAME	DESCRIPTION
DAC Type	<p>DAC Type is also referred to as Central Site. DAC Type controls the software functions available to the DAC. For example, if the DAC is defined as the Purchasing & Payables Central Site, mark the Purchasing & Payables Site checkbox. If the site is the primary Warehouse site, mark Warehouse Site. If the DAC is not the central site for any of the DAC Types, do not mark the checkbox.</p> <p>The DAC Type provides special access for users tied to the DAC. For example:</p> <p>General Ledger Site – a user has access to the full Chart of Accounts unless specific accounts are assigned to the DAC.</p> <p>Purchasing and Payables Site – If marked, mark the Require Approval checkbox if requisitions entered at the Purchasing & Payables Central Site on behalf of another DAC are required to go through the DACs defined approval process. If disabled, requisitions require no approval.</p> <p>Warehouse Site – If marked, also mark the Require Approval checkbox if any Warehouse requisitions must route through the DACs defined approval process.</p> <p>Fixed Assets Site – If marked, the central site can view all assets while non-central site users can only view assets assigned to the user's DAC.</p> <div>  <p>To fully implement DACs in Fixed Assets, also assign each asset location to a DAC in Fixed Assets > Configuration > Locations.</p> </div>
Check Budget	Mark the checkbox if the system is to check budget balances as users for the DAC enter requisitions. The system budget checks based on the DAC selected on the requisition, not by the DAC assigned to the user.
Maintain Budget Limit	Mark the checkbox to not allow requisition processing if there is insufficient budget. The system does not process a detail line with an account over budget.
PO Limit	Enter an amount to set a dollar limit for the maximum purchase order amount members of the DAC can preview and print.

FIELD NAME	DESCRIPTION
Override Ranges (Minimum Number, Maximum Number, Next Value)	Enter values as applicable to assign specific purchase order number ranges to a DAC (Numbers also override requisition numbers) and to override the normal Next Value counter for purchase order requisitions and purchase orders set in Purchasing & Payables > Configuration > Purchasing and Payables Default Settings.

PO Heading Information

Add Distributed Accountability Center

DAC Information **PO Heading Information** **PO Message Information** **DAC Account Masks** **SIF**

PO Heading Information

Name:

Street:

City:

State: Zip:

Contact:

Phone: Extension: ☐ Suppress Printing?


Ship To:

Signature

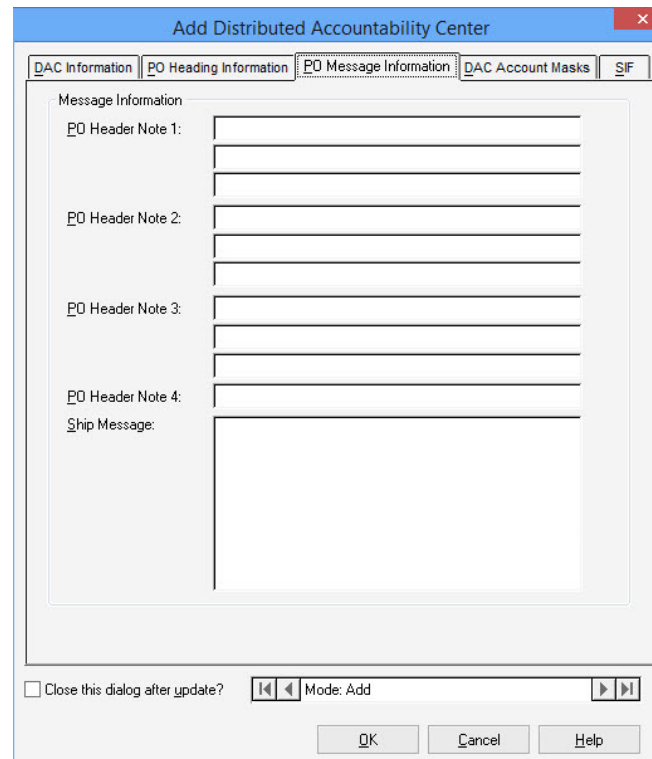
Signature Name:

☐ Close this dialog after update? Mode: Add

PO Heading Information tab

FIELD NAME	DESCRIPTION
PO Heading Information tab	
Suppress Printing?	Mark the checkbox if the name, address, and contact information should not print on purchase orders. For example, purchase orders already have this information printed on them.
Ship To	<p>From the dropdown select the applicable location. The selected location defaults for all requisitions created by the DAC. If needed, users can change the location when they enter requisitions.</p>  <p>If the user belongs to an AP Central Site DAC, the Ship To information does not default after the first requisition.</p>
Signature Name	From the dropdown, select the applicable signature to use on purchase orders for the DAC. Only signatures defined in General Ledger > Configuration > Signatures are available for selection.

PO Message Information



The screenshot shows a software window titled "Add Distributed Accountability Center". It has several tabs: "DAC Information", "PO Heading Information", "PO Message Information" (which is the active tab), "DAC Account Masks", and "SIF". Inside the "PO Message Information" tab, there is a section labeled "Message Information" containing five text input fields: "PO Header Note 1:", "PO Header Note 2:", "PO Header Note 3:", "PO Header Note 4:", and "Ship Message:". At the bottom of the window, there is a checkbox labeled "Close this dialog after update?", a "Mode: Add" dropdown menu, and three buttons: "OK", "Cancel", and "Help".

PO Message Information tab

FIELD NAME	DESCRIPTION
PO Message Information tab – PO Notes and Shipping Information	
PO Header Note 1, Note 2, and Note 3	Use these 3 fields to define up to 3 different messages to print on each purchase order. For example, send 2 copies of invoice, Mail Invoices to above address, or PO is void after 90 days.
PO Header Note 4	Enter a single-line message (up to 40 characters). The message prints at the top of any purchase order designated as a blanket PO.
Ship Message	Enter a message (up to 255 characters). The message prints on the Vendor and File copy of every purchase order.



The information entered on the PO Heading Information and PO Message Information tab can be copied from one DAC to another (See, Copy Purchase Order Information).

DAC Account Masks

On this tab, enter account masks. All accounts matching the account mask are automatically assigned to the DAC.



If DAC Account Masks is used to add masks, none of the other methods for assigning accounts to a DAC can be used.

Once DAC Account Masks are set up, new account codes added to the General Ledger through Account Code Input or automatically added through Payroll/Budgeting, the new accounts are automatically assigned to the DAC based on the defined masks.

DAC Account Masks tab

FIELD NAME	DESCRIPTION
DAC Account Masks tab	
Account Mask	Enter an account mask specifying the range of accounts the DAC can access.
AllowReqs	Mark the checkbox to allow the DAC to process requisitions using accounts identified by the mask.
AllowBudget	Mark the checkbox to allow the DAC to adjust the budget for the accounts identified by the mask.
Exclude	Mark the checkbox to prevent the system from automatically assigning accounts identified by the mask to the DAC when new accounts are added in General Ledger or Payroll/Budgeting.

School Interoperability Framework (SIF)

School Interoperability Framework enables diverse applications to interact and share data related to entities in the K-12 instructional and administrative environment. A typical use of SIF is to connect products from various vendors together within a single school. The fields on this tab are required.

SIF tab

FIELD NAME	DESCRIPTION
SIF tab	
Location Type	Identify the location by selecting Non-School or School.
Site Category	

Copy Purchase Order Information

Security > Workflow Configuration > Distributed Accountability Centers

To save time, PO Heading Information and PO Message Information can be copied from one DAC to another rather than having to re-enter the same information when setting up a new DAC or updating an existing DAC.

Follow the steps below to copy the information:

1. In the Distributed Accountability Centers grid, highlight the DAC to copy the PO Heading Information and PO Message Information to.
2. From the Actions menu, select **Copy PO Info**. The Copy DAC Info Selection Screen window displays.

3. From the **DAC** dropdown, select the DAC to copy information from.
4. Mark the **Copy PO** Info checkbox.
5. Click **OK**.



Any existing PO Heading and PO Message information for the highlighted DAC is replaced with the copied information.

6. Double-click the highlighted DAC and verify the information is accurate.

DAC ACCOUNTS

Security > Workflow Configuration > DAC Accounts

Overview

In Infinite Visions, there are 3 options to assign DAC Accounts:

Assign account masks as part of adding a DAC (See, DAC Account Masks).



Tyler suggests using this method.

Assign individual account

Assign by account mask using DAC Accounts

Assign by Individual Account Mask

This approach is probably most useful when a DAC is first set up or when new accounts should not automatically be added to the DAC. This option cannot be used for DACs with account masks specified as part of the DAC definition.

Follow the steps below to add assign DAC Accounts by mask:

1. From the Actions menu, select **Assign by Individual Account Mask**. The DAC Account Assignment window displays.

DAC Account Assignment window

2. In the **Account Mask** field, enter a mask specifying the range of accounts to assign to the DAC.
3. From the **DAC** dropdown, select the DAC to assign the account mask.
4. Mark the **Allow Requisitions** checkbox to allow the DAC to write requisitions against the accounts. The system default is marked.
5. Mark the **Allow Budget Adjustments** checkbox to allow the DAC to make adjustment to the budget for the accounts. The system default is marked.
6. To add another mask, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
7. Click **OK**.
8. Click **Yes** to proceed (Click **No**, to return to the DAC Account Assignment window to make changes). A progress bar displays during the process of assigning accounts and a message displays when the process is finished.
9. Click **OK** to return to the DAC Accounts grid.

Assign Individual Account

This option cannot be used for DACs with account masks specified as part of the DAC definition.

Follow the steps below to assign an individual DAC Account:

1. Click **Add** on the tool bar or right-click in the DAC Accounts grid and select **Add**. The Add DAC Account window displays.

Add DAC Account window

1. From the **Account** dropdown, select the account to assign to the DAC.
2. From the **DAC** dropdown, select the DAC to assign the account.
3. Mark the **Allow Requisitions** checkbox to allow requisitions to be written against the account. The system default is marked.
4. Mark the **Allow Budget Adjustments** checkbox to allow budget adjustments to be made for this account. The system default is marked.
5. To add another mask, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
6. Click **OK**.
7. Click **Yes** to proceed (Click **No**, to return to the DAC Account Assignment window to make changes). A progress bar displays during the process of assigning accounts and a message displays when the process is finished.
8. Click **OK** to return to the DAC Accounts grid.

APPROVERS

Security > Workflow Configuration > Approvers

Overview

The Approvers menu item is used to define an approver, sequence in the approval process, approval process, and alternate approvers.

The approvers grid displays all currently defined approvers. From the grid, add, edit, and delete approvers as needed.

DAC	Approver	Sequence	JE Approval	Hours Entry	P & P	Warehouse	Budget
Capital City Elementary School	cwood	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Capital City Elementary School	pabbott	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Approvers grid

Filter Criteria	Description
Approver	From the dropdown, select the name. Only the selected approver displays in the grid.
DAC	From the dropdown, select a DAC. Only the approvers associated to the DAC display in the grid.

From the Actions menu, the following command is available:

Command	Description
Mass Assign Alternate Approver	Select this command to mass assign an approver to all records in the grid.

Follow the steps below to add an approver:

1. Right-click in the Approvers grid and select *Add*. The Add Approver window displays.

Alternate Approver	From Date	To Date
*		

Add Approver window

2. From the **DAC** dropdown, select the DAC the approver is being set up for.
3. From the **Approver** dropdown, select the employee.
4. In the **Sequence** field, enter the sequence number for this user in the approval process.
5. Mark the checkbox for the approval process (**Hours Entry, P&P Req Approval, Warehouse Req Approval, Budget JE Approval, Exp Reimbursement Approval**), as applicable for the approver. The requisitions get routed based on the following:

APPROVAL PROCESS	DESCRIPTION
Hours Entry	DAC and sequence entered in the Security > Workflow Configuration > Approvers.
P&P Req Approval	Accounts and dollars specified in Security > Workflow Configuration > Approver Accounts and Sequence in Security > Workflow Configuration > Approvers window.
Warehouse Req Approval	Accounts and dollars specified in Security > Workflow Configuration > Approver Accounts and Sequence in Security > Workflow Configuration > Approvers window.
Budget JE Approval	Accounts specified in Security > Workflow Configuration > Approver Accounts and Sequence in Security > Workflow Configuration > Approvers window.
Exp Reimbursement Approval	

6. To add another approver, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
7. Click **OK**.

Alternate Approvers

Alternate Approvers can be defined for an approver as needed. A single approver or multiple approvers can be designated for any DAC/Approver combination. An alternate approver can be temporary (for a specific date range) or permanent.

When an alternate approver signs in, they see all the approver's items pending their approval. If an alternate approver approves an item, the Approval Log displays the approver's name in the Approver column and the alternate approver's name in the Approved by column.

Follow the steps below to add an alternate approver:

1. In the Approver's grid, double-click the approver to add alternates. The Edit Approver window displays.
2. In the Alternate Approver's grid, click in a blank field in the Alternate Approver column.
3. From the dropdown, select the employee to add as an alternate approver.



Only employees defined as a DAC approver display in the dropdown.

4. If the alternate approver is temporary, enter a date in the **From Date** and **To Date** field.



ALTERNATE APPROVERS

If the DAC is changed, the Alternate Approvers dropdown automatically reloads with DAC approvers.

If an approver record is edited and the DAC changed, the system does not check to see if any existing alternate approvers belong to the new DAC. The alternate remains listed in the grid.

The Hours Entry Approval process is not currently designed to use Alternate Approvers.

APPROVER ACCOUNTS

Security > Workflow Configuration > Approver Accounts



Before adding approver accounts, it is necessary to define approvers.

The Approver Accounts menu item is used to specify accounts the approver is authorized to approve for requisitions and budget journal entries.

Follow the steps below to add approver accounts:

1. Click **Add** on the tool bar. The Add Approver Accounts window displays.

Add Approver Accounts window

2. From the **Approver** dropdown, select the user ID of the approver the accounts are being added.
3. The **DAC** field automatically populates with the DAC selected for the approver in Security > Workflow Configuration > Approvers. If a change needs to be made to the DAC, it must be made in the Edit Approvers window.
4. In the **Account Mask** field, enter the account mask for the range of accounts the approver can approve.
5. In the **Threshold** field, enter a dollar amount. The amount identifies at what amount requisitions must be approved by the approver. For example, a department head can approve requisitions up to \$50 without having the approval of the principal. However, requisitions over \$50 must have the principal approval. The department head would have a threshold of \$0.00 and the threshold for the principal would be \$50.

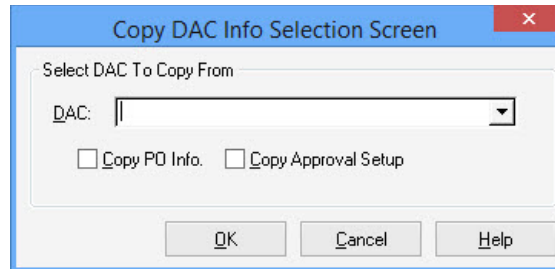
Copy Approval Setup

Security > Workflow Configuration > Distributed Accountability Centers

In Infinite Visions, the approval setup (Approvers and Approver Accounts) for 1 DAC can be copied to another DAC rather than having to define the setup again.

Follow the steps below to copy the approval setup:

1. In the Distributed Accountability Centers grid, highlight the DAC to copy the approval setup to.
2. From the Actions menu, select **Copy DAC Info**. The Copy DAC Info Selection Screen window displays.



Copy DAC Info Selection Screen window

3. From the **DAC** dropdown, select the DAC to copy information from.
4. Mark the **Copy Approval Setup** checkbox. This process does not copy any PAR Approver or PAR Approver Account setup.
5. Click **OK**. A warning message displays stating it is replacing the approval setup.
6. Click **OK** to proceed. The system copies the following information: Approver, Sequence, Checkbox Settings, Account Mask, and Threshold to the highlighted DAC. A message displays when complete.

REASSIGN APPROVER

Security > Workflow Configuration > Reassign Approver

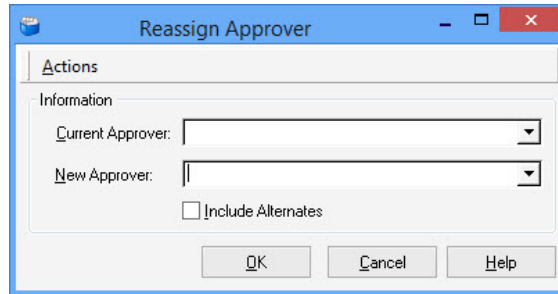
The Reassign Approver menu item is used to permanently assign another approver to take an original approver's place in the approval process (e.g., approver leaves the district).

Things to consider when reassigning approvers:

- Requisitions cannot be reassigned to an approver already part of the approval process.
- If the current approver is on an approval process for more than 1 DAC, the new approver is reassigned all requisitions for all DACs associated with the current approver.

From the Actions menu, the following command is available:

COMMAND	DESCRIPTION
Requisitions by Current Approver	Select this command to generate a list of requisitions assigned to the current approver. The report displays in the Report Viewer.



Reassign Approver window

Follow the steps below to reassign an approver:

1. From the **Current Approver** dropdown, select the applicable approver.
2. From the **New Approver** dropdown, select the approver to reassign the current approver's requisitions.
3. Mark the **Include Alternates** checkbox to also reassign any alternates assigned to the current approver to the new approver.
4. Click **OK**.

TRANSACTION JOURNAL ENTRY APPROVERS

Security > Workflow Configuration > Transaction Journal Entry Approvers

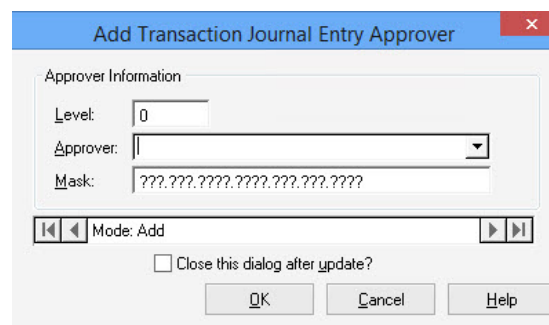
The Transaction Journal Entry Approvers menu is typically used for auditing purposes to set up a journal entry approval queue for adjusting journal entries. By default, adjusting journal entries are posted without requiring approval, however, set up an approval process, as needed.



A Transaction Journal Entry Approval queue is set up for the entire DAC not by individual DAC.

Follow the steps below to set up a transaction journal entry approval queue:

1. Right-click in the Transaction Journal Entry Approvers grid and select **Add**. The Add Transaction Journal Entry Approver window displays.



Add Transaction Journal Entry Approver window

2. In the **Level** field, enter the level for the approver. An approver can only be assigned 1 level; however, they can have multiple masks assigned to the same level.



Only the approver defined with the highest level can post a transaction journal entry.

3. From the **Approver** dropdown, select the name of the approver.
4. In the **Mask** field, enter the mask for the range of accounts the approver can approve.
5. To add another approver, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
6. Click **OK**.

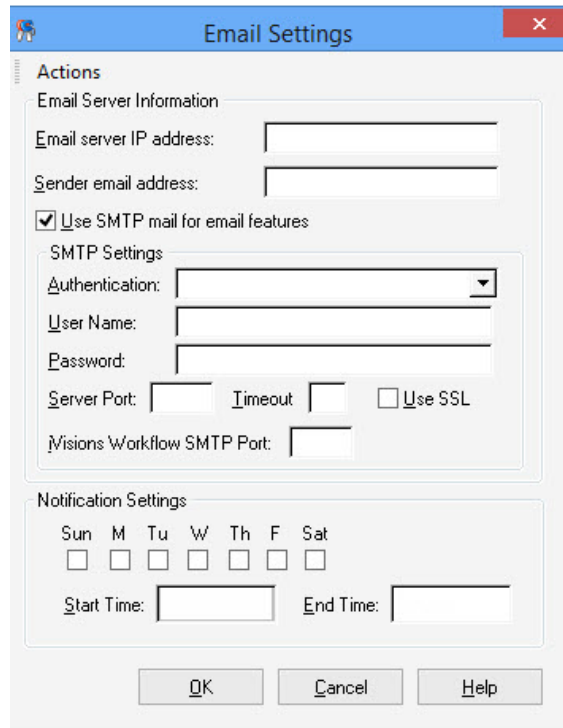
EMAIL SETTINGS

Security > Workflow Configuration > Email Settings

Email Settings is used to set up SMTP mail to use with the email features within the Infinite Visions Accounting application.




Tyler only supports Enterprise email systems.



The 'Email Settings' dialog box is titled 'Email Settings' with a close button (X) in the top right corner. It contains two main sections: 'Email Server Information' and 'Notification Settings'. Under 'Email Server Information', there are text boxes for 'Email server IP address:' and 'Sender email address:'. Below these is a checked checkbox labeled 'Use SMTP mail for email features'. This is followed by a 'SMTP Settings' section containing a dropdown for 'Authentication:', text boxes for 'User Name:' and 'Password:', and fields for 'Server Port:', 'Timeout', and 'Use SSL' (unchecked). There is also a 'Visions Workflow SMTP Port:' field. The 'Notification Settings' section includes a row of checkboxes for days of the week (Sun, M, Tu, W, Th, F, Sat) and two text boxes for 'Start Time:' and 'End Time:'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Email Settings window

From the Actions menu, the following commands are available (Use SMTP mail for email features checkbox must be marked):

COMMAND	DESCRIPTION
Test Email	Select this command to generate a test email
Create Alert Job	Select this command to create a job for the email alerts.
Create Report Server Job	Select this command to create a report server job. This command should only be run once per fiscal year.  TCM Users must select this command to reset the job configuration on the SQL Server.

FIELD	DESCRIPTION
Email server IP Address	Enter the server IP address (up to 255 characters) to use for back end email messages. This is a required field.

FIELD	DESCRIPTION
Sender email address	Enter a valid sender email address. Consider making this address system-wide, instead of an individual user. For example, set up an email address of AccountingAtDistrict or System Message.
Use SMTP mail for email features	Mark the checkbox to use SMTP mail for all email features.
SMTP Settings	Use these fields to select the authentication approach as well as other security settings such as Server Port, Timeout, Use SSL, and iVisions Online Workflow SMTP Port (only for those using iVisions Online Workflow and Gmail).
Notification Settings	Mark the checkbox for the day(s) of the week the alert is to run and enter a Start Time and End Time (military time).

EMAIL ALERTS AND JOBS

Security > Workflow Configuration > Email Alerts and Jobs

Overview

The Email Alerts and Jobs menu items is used to automatically email alerts to users under specific situations. SMTP email settings must be configured in Infinite Visions prior to setting up the alerts.



Email Alerts include users who only have access to the Administration application. The system uses the email address entered in the Preferred Email Address field in Payroll > Employees > Employee Maintenance.

The Email Alerts grid display all currently pre-defined email alerts. While some of the fields relating to an alert can be changed, many fields are read-only.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Create Export Job	Select this command to define an export job for the selected Info-Link report or entered SQL statement. The job runs, and exports data as defined. Data can be exported in comma or tab delimited format. In addition, data can be uploaded to an FTP site specified in the selected template (The Send to FTP checkbox and a template must be defined in Security > Workflow Configuration > FTP Template Setup).
Create Import Job	Select this command to define a job to import a file and update employee information.

Activate Email Alert

Follow the steps below to activate an alert:

1. In the grid, double-click the alert to activate. The Edit Email Alert window displays.
2. Mark the **Active** checkbox.
3. In the **Frequency** field, enter the number (# of times the alert is to be sent) as applicable.
4. From the **Units** dropdown, select the applicable (How often alert is to occur) option.
5. Click **OK**.

CHANGE LOG EMAIL ALERTS

Security > Workflow Configuration > Change Log Email Alerts

Overview

The Change Log Email Alerts menu item is used to define custom email alerts based on the Change Log. When changes are made to fields in Employee Maintenance, Employee Deductions, or Employee Positions and Pay are modified, the system writes records to the Change Log which triggers these alerts and sends them to the specified email addresses. For example, the HR Manager would like to be alerted any time there is a change made to an employee social security number.

The Change Log Email Alerts grid displays all currently defined email alerts.

Follow the steps below to add an alert:

1. Click **Add** on the tool bar or right-click in the grid and select *Add*. The Add Change Log Email Alert window displays.

Change Log Data Fields			
Field Name	Old Value	New Value	Reason

Add Change Log Email Alert window

2. In the **Name** field, enter a name for the alert. The name displays in the Subject line of the email message.
3. From the **Data Type** dropdown, choose the applicable option (*Employee, Position, Deduction, Funding Detail Vendor, or JE Approval*).
4. In the **Description** field, enter a description of the situation for the alert.
5. In the **Email Address** field, enter the email address of the person who is the recipient of the email.
6. Right-click in the Change Log Data Fields grid and select *Add*. The Add Change Log Email Detail window displays.

Add Change Log Email Detail window

7. From the Field Name dropdown, select the field to monitor.
8. Enter the information in the **Old Value**, **New Value**, and **Reason** field to further refine the email alert. If the fields are left blank, the system triggers the email whenever there is a change made to the selected field.
9. To add another detail line, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
10. Click **OK**.

Activate Change Log Email Alert

The Change Log Email Alerts must be activated before the system begins sending the email (See, Activate Email Alert).

PORTAL DEFAULT SETTINGS

Security > Workflow Configuration > Portal Default Settings

Overview

If the district is using the iVisions Web Portal, the Portal Default Settings menu item is used to define the interface defaults for Infinite Visions.

For detailed descriptions of each setting, refer to the Help system.

USER DEFINED FIELDS (UDFS)

Security > Workflow Configuration > User Defined Fields

Overview

The User Defined Fields menu item is used to define fields to track information not currently tracked in Infinite Visions. The User Defined Fields grid displays all currently defined UDFs. User Define Fields can be defined for the following items.

- Employee Maintenance – up to 20 UDFs
- Employee Evaluations – up to 10 UDFs
- Employee Positions – up to 10 UDFs
- Employee Supplemental Pay – up to 10 UDFs
- Asset Detail – up to 10 UDFs
- Vendor Maintenance – up to 10 UDFs
- Warehouse Items – up to 10 UDFs

From the Actions menu, the following command is available:

COMMAND	DESCRIPTION
Copy Field Definition	Select this command to copy an existing UDF field definition. The copy of the UDF display in the grid with Copy preceding the name (e.g., Copy of PAR name).

Define a User Defined Field

Follow the steps below to add User Define Fields:

1. Click **Add** on the tool bar or right-click in the User Defined Fields grid and select *Add*. The Add User Defined Field window displays.

Add User Defined Field window

2. From the **Type** dropdown, select the applicable option.
3. In the **Sequence** field, enter the number to identify the field display sequence.
4. In the **Name** field, enter a name (up to 50 characters) to identify the field. The name must be unique.
5. From the **Data Type** dropdown, select the applicable option (*Text*, *Date*, *Dropdown*).



Once a UDF is defined and data is entered, the Data Type field cannot be changed. In a situation where it is necessary to change the Data Type field, contact Tyler Technical Support for an evaluation of the best approach to handle the situation.

6. If the Data Type is *Dropdown*, in the Values window, enter the options to display in the dropdown.
7. Mark the **Required** checkbox if the field must be populated.
8. Beneath the PARs Only – Field Security Fields section, the **HR**, **PR**, and **All Other** dropdown field, select the access level for this field for HR, PR, and other users. If using PARs in Infinite Visions only, set the access levels for the different types of users by selecting the applicable option.

These fields work in conjunction with settings in Security > User Security > HR/PR Security Options tab where each user be defined as having Payroll or Human Resources UDF permission. If using PARs with iVisions Web Portal, these fields are not used.

If nothing is selected from the dropdown for each of these fields, the field cannot be accessed at all in the PARs window.

9. To add another UDF, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox and click **OK**.

PAYROLL USER ROLES

Security > Workflow Configuration > Payroll User Roles

Overview

The Payroll User Roles menu item is used to define Payroll User Roles with different access levels for the different types of users working in the Infinite Visions application. For each payroll user role, assign access to items on the following tabs:

- Emp Pay Security – Fields and Actions in Employee Positions and Pay
- Emp. Maint. Security – Dates/Demographics fields in Employee Maintenance
- Employee Maint. Actions
- HR Document Types
- Contact Types
- Misc

Define Payroll User Role

Follow the steps below to define a Payroll User Role.

1. Right-click in the PR User Roles grid and select *Add*. The Add User Role window displays.

Add User Role

User Role Information

Name:

Description:

Emp. Pay Security | Emp. Maint. Security | Emp. Maint. Actions | HR Document Types | Contact Types | Misc.

Employee Info:	<input type="text" value="Full Access"/>	Rate - Time Entry:	<input type="text" value="Full Access"/>
Description:	<input type="text" value="Full Access"/>	Bank:	<input type="text" value="Full Access"/>
Control Code:	<input type="text" value="Full Access"/>	State Code:	<input type="text" value="Full Access"/>
ETE:	<input type="text" value="Full Access"/>	Contract:	<input type="text" value="Full Access"/>
Pay Type:	<input type="text" value="Full Access"/>	Cert / Class:	<input type="text" value="Full Access"/>
Department:	<input type="text" value="Full Access"/>	Budget:	<input type="text" value="Full Access"/>
DAC:	<input type="text" value="Full Access"/>	Prior Year:	<input type="text" value="Full Access"/>
Supervisor:	<input type="text" value="Full Access"/>	Leave Factor:	<input type="text" value="Full Access"/>
Position Type:	<input type="text" value="Full Access"/>	Leave Plan:	<input type="text" value="Full Access"/>
Position Status:	<input type="text" value="Full Access"/>	Projection:	<input type="text" value="Full Access"/>
One Time Pay:	<input type="text" value="Full Access"/>	Comments:	<input type="text" value="Full Access"/>
Position Category:	<input type="text" value="Full Access"/>	Pay Basis:	<input type="text" value="Full Access"/>
Approval Template:	<input type="text" value="Full Access"/>	Pay Method:	<input type="text" value="Full Access"/>
Exclude Insurance:	<input type="text" value="Full Access"/>	Pay Type - Position:	<input type="text" value="Full Access"/>
ICI Information:	<input type="text" value="Full Access"/>	Pay Type - Sup:	<input type="text" value="Full Access"/>

<input checked="" type="checkbox"/> Copy record	<input checked="" type="checkbox"/> Payroll journal	<input checked="" type="checkbox"/> Allow create supp. pay from employee position	<input checked="" type="checkbox"/> Allow create supp. pay from Excel	<input checked="" type="checkbox"/> Create from Term. PAR
<input checked="" type="checkbox"/> Transfer	<input checked="" type="checkbox"/> Manage documents	<input checked="" type="checkbox"/> Allow mass EE Deduction update	<input checked="" type="checkbox"/> Allow mass EE Position & Pay update	

☐ Close this dialog after update?

Mode: Add

OK Cancel Help

Add User Role window – Emp. Pay Security tab

2. On the **Emp. Pay Security** tab, from each field dropdown, select the level of user role access for the fields in Employee Positions and Pay. The default is Full Access. In addition, mark the checkbox for the command(s) a user with the assigned role can access from the Payroll > Employees > Employee Positions and Pay > Actions menu.
3. Choose the **Emp. Maint. Security** tab.

Add User Role

User Role Information

Name: Full Access

Description: Full Access

Emp. Pay Security | **Emp. Maint. Security** | Emp. Maint. Actions | HR Document Types | Contact Types | Misc.

Employee Name:	Full Access	Employee ID:	Full Access	User Defined Field:	Full Access
Social Security:	Full Access	Issue Pay Check:	Full Access	Archive:	Full Access
State ID:	Full Access	Substitute:	Full Access	Mailing Address:	Full Access
Street Address:	Full Access	Status:	Full Access	Category:	Full Access
Gender:	Full Access	Marital Status:	Full Access	Email Address:	Full Access
Check Location:	Full Access	Job Title:	Full Access	Template:	Full Access
Emp. Comments:	Full Access	Phone Numbers:	Full Access	Portal User:	Full Access
Birth Date:	Full Access	Hire Date:	Full Access	Probation Ends:	Full Access
Seniority Date:	Full Access	Tenure Date:	Full Access	Leave Accrual Date:	Full Access
Benefits Eligibility:	Full Access	Insurance Class:	Full Access	Termination:	Full Access
Rehire Date:	Full Access	Ethnicity:	Full Access	EEOC:	Full Access
Medicaid Class:	Full Access	Experience:	Full Access	Leave Bank:	Full Access
User Defined:	Full Access	Picture:	Full Access	Change Log:	Full Access
Primary Worksite:	Full Access	State Data:	Full Access	Last Paid Date:	Full Access
Bargaining Unit:	Full Access	Union Code:	Full Access	Expense Requests:	Full Access
Export to SIS:	Full Access	EE Transparency:	Full Access		

☐ Close this dialog after update?

Mode: Add

OK Cancel Help

Emp. Maint. Security tab

- Set the user role level of access to the Dates/Demographics fields in Payroll > Employees> Employee Maintenance.
- Choose the **Emp. Maint. Actions** tab.

Add User Role

User Role Information

Name: Full Access

Description: Full Access

Emp. Pay Security | Emp. Maint. Security | **Emp. Maint. Actions** | HR Document Types | Contact Types | Misc.

Certificates:	Full Access	Employee Criteria:	Full Access	YTD:	Full Access
Contracts:	Full Access	Evaluation:	Full Access	Position:	Full Access
Deductions:	Full Access	Emergency:	Full Access	PR Journal:	Full Access
Dependents:	Full Access	Language:	Full Access	Leave:	Full Access
Documents:	Full Access	Education:	Full Access	Misc. Tracking:	Full Access

☒ Allow employee forms ☒ Allow user to print labels ☒ Allow create iVisions user

☒ Allow use Termination Wizard

Emp. Maint. Actions tab

6. From each dropdown, select the user role access level for the Actions menu commands in Payroll > Employees > Employee Maintenance.
7. Choose the **HR Document Types** tab.

The screenshot shows the 'Add User Role' dialog box. The 'User Role Information' section has 'Name: Full Access' and 'Description: Full Access'. The 'HR Document Types' tab is selected, displaying a table with the following data:

HR Document Type	Access Level
Contract	
Fingerprinting	
I-9	
*	

The bottom of the dialog shows 'Mode: Add' and buttons for 'OK', 'Cancel', and 'Help'.

HR Document Types tab

8. Click in a blank row in the HR Document Types grid.
9. From the dropdown select the document type(s) the users with the assigned payroll user role can access. Only types defined in Human Resources > Configuration > HR Document Types are available for selection.



If there are no documents on this tab, users with this payroll user role cannot access any employee documents.

10. Choose the **Contact Types** tab.

Add User Role

User Role Information

Name: Full Access

Description: Full Access

Emp. Pay Security | Emp. Maint. Security | Emp. Maint. Actions | HR Document Types | **Contact Types** | Misc

Contact Type
*

Close this dialog after update?

Mode: Add

OK Cancel Help

Contact Types tab

11. Click in a blank row in the Contact Types grid.
12. From the dropdown, select the applicable contact type (s) users with the payroll user role can access. Only Employee Contact Types defined in Human Resources > Configuration > Employee Contact Types are available for selection.
13. Choose the **Misc** tab.

Misc tab

14. Mark the checkbox for each of the following as applicable:

OPTION	DESCRIPTION
Allow Delete Transactions	Mark the checkbox to enable users with the assigned user role to delete employee leave transactions.
Allow Rollup	Mark the checkbox to allow users with the assigned user role to roll up accrued records into 1.
Enable Payroll Notes	Mark the checkbox to enable users with the assigned user role to view the Notes field in the Process Payroll window and enable user to add notes.
Enable Right-click Menu for Employee Groups	Mark the checkbox to all users with the assigned user role to add groups on the fly in Payroll related grids using the shortcut menu.
ACA Employee and Dependent Tabs	From the dropdown select the applicable option (<i>Full Access, View Only, No Access</i>) to data on the tabs in Payroll > Employees > Employee Maintenance and Payroll > Employees > Employee Deduction & Benefits.

15. To add another payroll user role, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
16. Click **OK**.

Assign Payroll User Roles

Security > User Security

Follow the steps below to assign individual users a payroll user role.

1. In the grid, double-click the user record to assign a payroll user role. The Edit User Security window displays.
2. Choose the **HR/PR Security Options** tab.
3. From the **Payroll User Role** dropdown, select the role with the level of access to assign to the user.
4. Click **OK**.

HISTORY CONNECTION GROUPS

Security > Workflow Configuration > History Connection Groups

Overview

Infinite Visions enables the view of data across several previous fiscal years. The History Connection Groups menu item is used to identify the each of the connection groups to include.



All connection groups should reside on the same server.

Follow the steps below to add a history connection group:

1. Right-click in the History Connection Groups grid and select *Add*. The Add History Connection Group window displays.

A screenshot of the 'Add History Connection Group' dialog box. The window has a blue title bar with the text 'Add History Connection Group' and a red close button. The main area is titled 'History Connection Group Information' and contains several fields: 'Connection Group' (a dropdown menu), 'Notes' (a text box), and 'Fiscal Year' (a text box). Below these are five checkboxes: 'GL' (checked), 'PR/HR' (checked), 'Employee Evaluations' (checked), 'Tyler Pulse' (unchecked), and 'Tyler Transparency' (unchecked). At the bottom, there is a 'Mode' dropdown set to 'Add', a checkbox for 'Close this dialog after update?' (unchecked), and three buttons: 'OK', 'Cancel', and 'Help'.

Add History Connection Group window

2. From the **Connection Group** dropdown, select the applicable connection group.

3. In the **Notes** field, enter any pertinent information about the connection group.
4. In the **Fiscal Year** field, enter the fiscal year for the selected connection group. The year displays on the Employee Positions/Supplemental Pay/Position Archive grid in Payroll > Employee History > Employee Position History and the Employee Leave Plan grid in Payroll > Employee History > Employee Leave History.
5. Mark the **GL** checkbox.
6. Mark the **PR/HR** checkbox to allow access to the Employee Position History and Employee Leave History data in Payroll > Employee History. Default is marked.
7. Mark the **Employee Evaluations** checkbox to allow access to employee evaluation data. Default is marked.
8. Mark the **Tyler Pulse** checkbox to allow the connection group to retrieve data from multiple sources stored in Tyler Pulse.
9. Mark the **Tyler Transparency** checkbox to include data across fiscal years in Tyler Transparency Reporting (up to 3 prior year connection groups can be used).
10. To add another connection group, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
11. Click **OK**.

INVOICE APPROVERS

Security > Workflow Configuration > Invoice Approvers

Overview

If the district is using iVisions, use the Invoice Approvers menu item to define an approval queue for invoices. While the approval queue for invoices is set up in IVEE, the invoice approval takes place in iVisions.

The Invoice Approvers grid displays all currently defined invoice approvers.

Follow the steps below to define an invoice approval queue:

1. Right-click in the Invoice Approvers grid and select *Add*. The Add Invoice Approver window displays.

2. In the **Level** field, enter the number to identify the approvers sequence in the approval process (e.g., if the approver is the 2nd person in the process to approve the invoice, enter 2).
3. In the **Threshold** field, enter a dollar amount. The amount is the minimum total amount of the invoice requiring the approvers approval. Invoices meeting the Threshold amount or above are routed to the approver.
4. From the **Approver** dropdown, select the user being defined as an approver.
5. In the **Mask** field, enter digits, zeros, or leave the question marks as needed to specify the account(s) the approver is authorized to approve.
6. Click **OK** to add another approver. Otherwise, mark the **Close this dialog after update?** checkbox.
7. Click **OK**.

PROVISIONAL DATABASE

Security > Workflow Configuration > Create Provisional Database

Overview

The Create Provisional Database menu item is used to create a set of databases to use for testing and budgeting purposes.

From a testing standpoint, having the additional connection group provides the ability to run various procedures in a sandbox environment and measure their impact before they are performed in the live connection group. In addition, the provisional database provides the Tyler Support Representative an area where they can troubleshoot issues with no impact on the district's live data.

From a budgeting standpoint, use the provisional connection group for creating detailed payroll budget information to import into the district's live database. The benefit of budgeting in a provisional database is employee salary amounts and deductions/benefit contribution amounts can be adjusted without impacting the current data. Once budgeting is completed in payroll in the provisional database, import the full payroll detail back into the Position Budgeting area of the live connection group.

Prior to creating a provisional database, the following steps must be completed in the Infinite Visions Administration application.

1. From the View menu, select **Options**.

2. Mark the **Allow Provisional Database Creation** checkbox.
3. In the **Provisional Limit** field, in the Add/Edit Entity window, enter the number of provisional databases an entity can create.
4. Add a Connection Group for the database and mark the **Provisional** checkbox in the Add Connection Group window.



By default, only the user who creates the database has access. Make sure any other users who need access, have the new connection group selected.

Create Provisional Database

Follow the steps below to create a provisional database:

1. Log into Infinite Visions Accounting.
2. Select: **Security > Workflow Configuration > Create Provisional Database**. The Create Provisional Database window displays.



When the Create Provisional Database menu is selected, the system checks the number of provisional databases for the entity. If it exceeds the Provisional Limit, the user is unable to create a new provisional. If the name is the same, it overlays the existing provisional (if exists).

3. In the **Name** field, enter a name for the connection group. The name cannot contain spaces. If spaces are found, a validation message displays.
4. Enter the information as applicable in the **Fiscal Year, Description, FY Database, and Base Database** fields.
5. Mark the **Reset Payroll** checkbox to delete the payroll and deduction journals for the provisional database along with resetting funding Paid-to-Date to zero, work calendars, and Payroll steps to zero.
6. Mark the **Clear Documents** checkbox to delete all document attachments for the provisional database.
7. Click **Next**.
8. In the **Database** field, enter a name for the state database.
9. Click **Next**. Verify the information.
10. To make any changes, click **Back**. Otherwise, click **Next** to begin creating the provisional database.
11. Click **Next**.
12. Click **Finish**.

LEAVE APPROVAL WORKFLOW

Security > Workflow Configuration > Leave Approval Workflow

Overview

If the district is using the iVisions Web Portal and the leave request process requires multiple leave approvers, use the Leave Approval Workflows menu item to define a workflow for each of the different types of leave requests. For example, consider different workflows for classified and certified sick leave or for jury duty.



Leave Approval Workflows must be in place prior to adding Leave Approval Approvers and they must be assigned to the appropriate leave plan in Payroll/Human Resources > Employees > Employee Leave Plans.

Follow the steps below to add a leave approval workflow:

1. Right-click in the Leave Approval Workflows grid and select *Add*. The Add Leave Approval Workflow window displays.
2. In the **Workflow Name** field, enter a name for the workflow.
3. In the **Description** field, enter a description to identify the workflow. The description can be the same as the Workflow Name.
4. Click **OK** to add another workflow. Otherwise, mark the **Close this dialog after update?** checkbox.
5. Click **OK**.

LEAVE APPROVAL APPROVERS

Security > Workflow Configuration > Leave Approval Approvers

Overview

The Leave Approval Approvers menu item is used to create a record for each person authorized to approve leave.

Follow the steps below to add a leave approver:

1. Right-click in the Leave Approval Approvers grid and select *Add*. The Add Leave Approval Approvers window displays.

Add Leave Approval Approvers window

2. From the **Workflow Name** dropdown, select the Workflow to assign to the approver. Only workflows defined in Leave Approval Workflow display in the dropdown.
3. From the **Approver** dropdown, select the applicable approver. Only approvers defined in Approvers display in the dropdown.
4. In the **Sequence** field, enter the number to identify the approver's sequence in the approval workflow (e.g., if they are the 3rd person in the process, type "3").
5. In the **Threshold** field, enter the minimum number of submitted leave request hours/days required to display in the approver's approval queue.
6. To add another workflow, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
7. Click **OK**.

FTP TEMPLATE SETUP

Security > Workflow Configuration > FTP Template Setup

Overview

The FTP Template Setup menu items is used to define the templates for use with the Create Export Job command in Security > Workflow Configuration > Email Alerts and Jobs. Refer to the Help system for additional information.

USER DEFINED FORMS

Security > Workflow Configuration > User Defined Forms



This is for districts using the iVisions Employee Self Service (ESS) module.

Overview

The User Defined Forms menu item is used to define customized forms to publish to the portal for employee access.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Publish Selected Forms	Select this command to publish the forms in the grid to the portal.
UnPublish Selected Forms	Select this command to unpublish forms in the grid. Unpublished forms are not accessible in the portal.
Email Employees	Select this command to create an email to send to employees regarding the form highlighted in the grid.
Display All Form Data	Select this command to display a grid of all completed form data for the form highlighted in the grid.
Export Selected Forms	Select this command to export form data for the form highlighted in the grid. Data is exported in an XML file and saved to the specified folder. The export file does not contain employee groups, approval setup, or document attachment type.
Import Forms	Select this command to import form data from an XML file.

From the Add/Edit User Defined Forms window, the following commands are available:

COMMAND	DESCRIPTION
Set Form Image	Select this command to browse to and select an image (e.g., logo) to add to the form.
Clear Form Image	Select this command to clear the current image.
Set Allowed Groups	Select this command to specify group(s) who can access the form.
Setup Approvers	Select this command to define an approval process for the form.

COMMAND	DESCRIPTION
Preview Form	Select this command to view the form in the report viewer. Tyler suggests reviewing the form for accuracy prior to publishing to the portal. This command is not active until the form is saved.

Follow the steps below to add a user defined form:

1. Click **Add** on the tool bar or right-click in the User Defined Forms grid and select *Add*. The Add User Defined Forms window displays.

Add User Defined Form window

2. In the **Form Name** field, enter a name to identify the form. The name displays in the User Defined Forms grid.
3. Mark the **Allow Document Attachment** checkbox to allow a user to attach a document when submitting the form.



If the form has a document attached, the Attachment column in the User Defined Forms grid is automatically updated to display as marked. To open the attachment, select Actions > View Attachment.

4. Mark the **Required** checkbox if an attachment is required with the form.

5. Mark the **Single Submittal** checkbox to allow employees to only submit a form once (unless form has been returned to them). If an employee submits a form more than once, they receive a message.
6. In the **Effective Range** date fields, enter the date(s) as applicable for the form. Employees are not allowed to submit/edit a form before the entered start date or after the end date. Both date fields are not required.
7. From the **Doc Type** dropdown, select the applicable document type. Only types defined in Human Resources > Configuration > HR Document Types display in the dropdown.



Tyler Content Manager (TCM) Users Only: The Document Type dropdown displays predefined TCM Document Codes.

8. In the **Form Title** field, enter a title to display at the top of the form.
9. In the **Form Text** field, enter the text (e.g., instructions) to display in the body of the form.
10. In the **Fields** window, right-click and select *Add*. The Add User Defined Field window displays. For more information on adding UDFs, refer to user defined fields (UDFs). The new fields display beneath the body text.
11. To add another field, click **OK**. Otherwise, mark the **Close this dialog after update?** checkbox.
12. Click **OK**.
13. Click **OK**.



Tyler Content Manager (TCM) Users Only: If the system detects an error when saving a user defined form or attachment, a message displays stating the form was not saved.

Set Form Image

On any form, an image (e.g., logo) can be added. The image display on the form to the left of the form title.

Follow the steps below to add an image:

1. From the Add/Edit User Defined Forms window, select **Actions > Set Form Image**. The Select File window displays.
2. Browse to and select the image to add to the form. Click **Open**. The image displays beneath the Form Image heading.
3. Click **OK**.

Set Allowed Groups

If needed, form access in the iVisions Web Portal can be restricted to a specific group of employees.

Follow the steps below to allow group access:

1. From the Add/Edit User Defined Forms window, select **Actions > Set Allowed Groups**. The Allowed Groups window displays.
2. Click in the blank row. From the dropdown, select the applicable group. Only groups defined in Human Resources > Configuration > Groups display in the dropdown.
3. Click **OK**.

Set up Approvers

If needed, an approval process can be set up for any of the defined forms.

Follow the steps below to define an approval process:

1. In the User Defined Forms grid, double-click the form to define the approval process for. The Edit User Defined Form window displays.
2. From the Actions menu, select **Setup Approvers**. The user Defined Form Approvers window displays.

Approvers	
Approver	Rank
*	

User Defined Forms Approver window

3. Mark the **Use Supervisor Approval** checkbox to route the form to the employee supervisor for approval. If marked, it is not necessary to define any additional approvers.

4. Choose the **Approval Type** (*HR, PR, Both, Neither*) as applicable. If HR or PR (default) is selected, the form routes to HR/PR for completion (to update employee information. Forms routed to HR/PR display in Infinite Visions > My Workflow > HR/PR User Defined Form Completion. (See,)) If Neither is marked, the form displays an approved status and remains in the My Workflow > User Defined Forms Approval window.
5. Mark the **Clear Approval Log on Return** checkbox to clear the approval log when a form is returned to the employee.
6. In the Approvers grid, click in a blank row. From the dropdown, select an approver (Only approvers defined in Security > Workflow Configuration > Approvers display).
7. In the **Rank** field, enter the number representing the routing order of the approver in the approval process.



Multiple approvers can be assigned the same rank. The form is routed to the approvers at the same time. Once 1 of the approvers approves the form, it continues through the approval process.

8. Click **OK** to return to the Add/Edit User Defined Forms window.
9. Click **OK** to return to the User Defined Forms grid.

Publish User Defined Form

After defining a form, it is necessary to publish the form for employees to have access to the form(s) in iVisions ESS > Self Service > User Defined Forms.

Follow the steps below to publish a form:

1. Filter the User Defined Forms grid to display on the form(s) to publish.
2. From the Actions menu, select **Publish Selected Forms**. The grid automatically refreshes and displays all forms. The Published column is updated to display as marked for the published forms. Employees can now access the forms in the web portal.



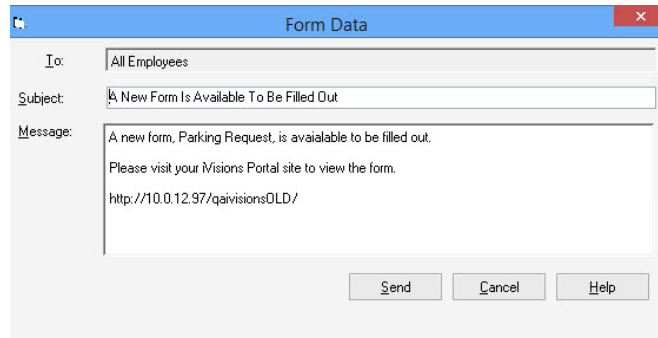
Unpublish a form by filtering the grid to display only the form(s) to unpublish. From the Actions menu, select UnPublish Selected Forms. The system clears the Published checkbox and removes the forms from the portal.

Email Employees

The Email Employees command is used to create an email to send to all employees or to the group(s) of employees assigned to the selected form.

Follow the steps below to email employees:

1. In the User Defined Forms grid, highlight the form.
2. From the Actions menu, select **Email Employees**. The Form Data window displays.

The image shows a 'Form Data' window with a blue title bar. It contains three input fields: 'To:' with 'All Employees' entered, 'Subject:' with 'A New Form Is Available To Be Filled Out' entered, and 'Message:' with a multi-line text area containing 'A new form, Parking Request, is available to be filled out. Please visit your iVisions Portal site to view the form. http://10.0.12.97/qavisionsOLD/'. At the bottom right are three buttons: 'Send', 'Cancel', and 'Help'.

Form Data window



By default, the email To field populates with All Employees or the group(s) assigned the form.

3. Review the **Subject** and **Message** fields. Change as needed.
4. Click **Send**. If the email is being sent to All Employees, a warning message displays.
5. Click **Yes** to continue.
6. Click **OK** to acknowledge message.

USER DEFINED FORMS APPROVAL

Infinite Visions > My Workflow > User Defined Forms Approval

Overview

The User Defined Forms Approval menu item displays submitted forms waiting for the approver to view and approve.

An approver can mark the Show All Forms checkbox to display all forms in the grid regardless of status or position in the approval queue. Only users with the Allow Show All Forms checkbox marked on the HR / PR Security Options tab in Security > User Security have access to the checkbox.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Return Selected to Employee	Select this command to return the selected form to the employee.
Return Selected to Prior Approver	Select this command to return the selected form to the prior approver.
Print/View Form	Select this command to print/view the selected form.
View Attachment	Select this command to view the document attached to the form. A message displays a message regarding printing approval log.
View Approval Log	Select this command to view the complete approval log for the form.
Approve Selected	Select this command to approve the form(s) in the grid with the Process checkbox marked and then route to the next approver. After the last approver has approved the form, it is ready for HR/PR Completion.

HR/PR USER DEFINED FORM COMPLETION

Infinite Visions/iVisions Online Workflow > My Workflow > HR/PR – User Defined Form Completion

The User Defined Forms Approval grid displays forms submitted employees through the web portal awaiting Human Resources or Payroll completion.

An approver can mark the Show All Forms checkbox to display all forms in the grid regardless of status or position in the approval queue. Only users with the Allow Show All Forms checkbox marked on the HR / PR Security Options tab in Security > User Security have access to the checkbox.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Mark Complete	Select this command to mark the form(s) in the grid with the Process checkbox marked as complete and remove the form from the grid. An email (User Defined Forms Completed) is automatically sent to each employee notifying them the form is completed. The email alert must be active. (See, Email Alerts and Jobs).
Undo Completion	Select this command to undo the completion of the forms in the grid marked Process. The form status is updated to display submitted.

COMMAND	DESCRIPTION
Add Payroll Note	Select this command to add a payroll note to the form(s) in the grid with the Process checkbox marked. The payroll note is available to view in the Payroll Processing grid. The user must have a payroll user role assigned with the Enable Payroll Notes checkbox marked on the Misc tab in Security > Workflow Configuration > Payroll User Roles.
Assign to Employee Group	Select this command to assign an employee group to a single employee or group of employees' in the grid with the Process checkbox marked. Only groups defined in HR/PR > Configuration > groups display for selection.
Print/View Form	Select this command to print/view the selected form.
View Attachment	Select this command to view the document attached to the form. A message displays asking if the approval log is to print on the form.
Save Attachment to Employee Record	For TCM users, select this command to save a form attachment to TCM. Otherwise, select this command to save the attachment to employee documents.
Save Form to Employee Record	For TCM users, select this command to save the completed form (.pdf) to TCM. Otherwise, select this command to save the completed form to Employee Documents.
View Approval Log	Select this command to view the complete approval log for the form.

SECTION SUMMARY

Replace this text with a summary of key points learned in this section.

Reports

Section Topics

- [Connection Group Listing](#)
- [Module Listing](#)
- [User Role Listing](#)
- [User Listing](#)

Introduction

The Reports menu item within the Security module provides the following reports:

- Connection Group Listing
- Module Listing
- User Role Listing
- User Listing

CONNECTION GROUP LISTING

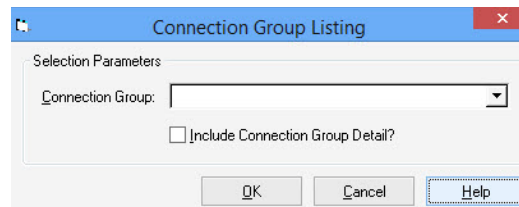
Security > Reports > Connection Group Listing

Overview

The Connection Group Listing displays a list of all databases (for the entity currently logged into) defined in the Infinite Visions Administration application.

Follow the steps below to generate a connection group listing:

1. Click the **Connection Group Listing** menu item. The Connection Group Listing window displays.



Connection Group Listing window

2. From the **Connection Group** dropdown, select the applicable option.
3. Mark the **Include Connection Group Detail?** checkbox to include the following information in the listing:

- Database name
- IP address
- Server

If the checkbox is not marked, only the database name displays in the list.

4. Click **OK**. The report displays in the report viewer. For a report example, see [Appendix A](#).

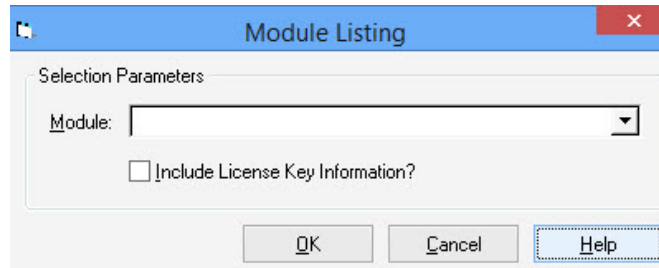
MODULE LISTING

Security > Reports

The Module Listing report is used to print the names of the modules (for the entity currently logged into) in your Infinite Visions Accounting application.

Follow the steps below to generate the module listing:

1. Click the **Module Listing** menu item. The Module Listing window displays.



Module Listing window

2. From the **Module** dropdown, select the applicable module. To print a listing of all modules, leave the field blank.
3. Mark the **Include License Key Information?** checkbox to display the License Key on the listing.
4. Click **OK**. The listing displays in the report viewer. To view a report example, see [Appendix A](#).

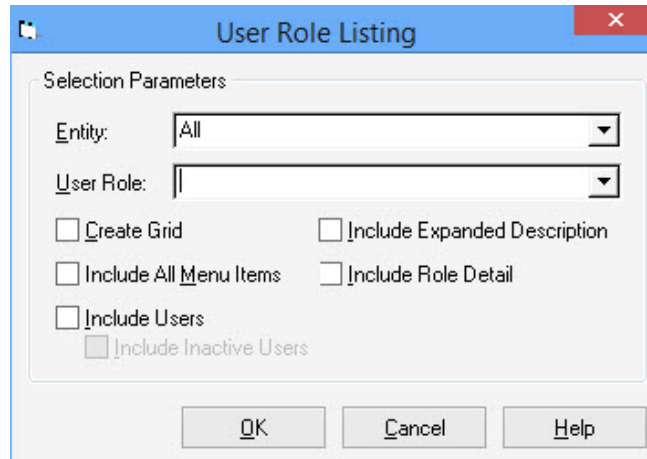
USER ROLE LISTING

Security > Reports

The User Role Listing report is used to print the user roles defined in the Infinite Visions Administration application.

Follow the steps below to generate the user role listing:

1. Click the **User Role Listing** menu item. The User Role Listing window displays.



The image shows a 'User Role Listing' dialog box with a blue title bar and a red close button. Inside, there's a 'Selection Parameters' section. It contains two dropdown menus: 'Entity' (set to 'All') and 'User Role' (empty). Below these are five checkboxes: 'Create Grid', 'Include Expanded Description', 'Include All Menu Items', 'Include Role Detail', and 'Include Users'. The 'Include Users' checkbox is checked, and it has a sub-checkbox 'Include Inactive Users' which is also checked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

User Role Listing window

2. From the **Entity** dropdown, select the applicable entity. Default is All.
3. From the **User Role** dropdown, select the applicable role. To print all user roles for the entity currently logged into, leave the field blank.
4. Mark the **Create Grid** checkbox to display grid lines on the report.
5. Mark the **Include All Menu Items** checkbox to list all menu items the user role can access.
6. Mark the **Include Users?** checkbox to display a list of names assigned to each user role. If marked, the Include Inactive Users checkbox becomes active and is marked by default. Clear the **Include Inactive** checkbox as needed.
7. Mark the **Include Expanded Description** checkbox to display a brief description of the menu item.
8. Mark the **Include Role Detail?** checkbox to include user role access information (e.g., access level, menu item).
9. Click **OK**. The listing displays in the report viewer. To view a report example, see [Appendix A](#).

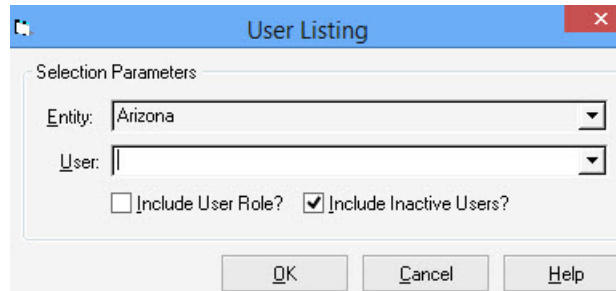
USER LISTING

Security > Reports

The User Listing report is used to print the users defined in the Infinite Visions Administration application.

Follow the steps below to generate the user listing:

1. Click the **User Listing** menu item. The User Listing window displays.

A screenshot of the 'User Listing' window. The window has a blue title bar with the text 'User Listing' and a red close button. Below the title bar is a 'Selection Parameters' section. It contains two dropdown menus: 'Entity' with 'Arizona' selected, and 'User' which is currently blank. Below these are two checkboxes: 'Include User Role?' which is unchecked, and 'Include Inactive Users?' which is checked. At the bottom of the window are three buttons: 'OK', 'Cancel', and 'Help'.

User Listing window

2. From the **User** dropdown, select a user name. To list all users for the entity, leave the field blank.
3. Mark the **Include User Role?** checkbox to display the user role assigned to the user. **Include Inactive Users?** is marked by default. Clear as needed.
4. Click **OK**. The listing displays in the report viewer. To view a report example, see [Appendix A](#).

DAC Filtering

Introduction

The section lists the menu items filtered for DACs.

In both Accounts Payable and Warehouse, the Central site does not see the DAC requisitions in the control panel, create PO, and print requisitions areas until they are approved.

Purchasing and Payables

- Control Panel**
- Create Purchase Orders
- Approve Requisitions
- Purchase Order Revisions (Using PO Revision Approval)
- Purchase Order Receiving
- Invoice Processing
- All Reports

Accounts Receivable

- Control Panel
- Invoice Processing
- Recurring Invoices
- Payment Processing
- Invoice Lines
- Payment Lines
- Printing Invoices
- Posting Invoices
- All Reports

Warehouse

- Warehouse Control Panel
- Approve Requisitions
- View Transactions
- All Reports

General Ledger

- Budget Journal Entries (Accounts filtered to DAC assigned accounts)
- Budget Input and Budget Input Using Definition (Set in the budget column definition. Applies to non-journal columns only)
- Journal Detail (By Entry view is locked if user's DAC does not include GL site)
- Account Detail**
- GL Report Writer (3 reports) – Selection of accounts to include on report is open. Filtering is only applied when in previewing or printing reports.
- Cash Balances Report (If user is a DAC user, the report is limited to only those codes assigned to the DAC user)
- Revenue and Expenditure Budget Balance Report
- Budget Control Group Report

Appendix A

Overview

This appendix displays example of the Security reports.

CONNECTION GROUP LISTING

Capital City School District #1

Connection Group Listing

Fiscal Year: 2010-2011

Group: LCDBFY1011 ☒ Include Detail?

Group Name	Fiscal Year	Description
LCDBFY1011	2011	LCDBFY1011

Connection Name	Server Name	Database Name:
LCDB_AZFY1011	WMAZT1DEVSQL2008	LCDB_AZFY1011
LCDBBase	WMAZT1DEVSQL2008	LCDBBase
LCDBFY0910	WMAZT1DEVSQL2008	LCDBFY0910
LCDBFY1011	WMAZT1DEVSQL2008	LCDBFY1011
LCDBFY1112	WMAZT1DEVSQL2008	LCDBFY1112

End of Report

MODULE LISTING

Capital City School District #1		
Module Listing		
Fiscal Year: 2010-2011		
Module: AP		<input checked="" type="checkbox"/> Include License Information?
Module Name	Description	License Key:
AP	Purchasing & Payables	AP-12616704
End of Report		

USER ROLE LISTING

Capital City School District #1			
User Role Listing			
Fiscal Year: 2010-2011			
User Role:	<input checked="" type="checkbox"/> Include Users?	<input checked="" type="checkbox"/> Include Role Detail?	<input checked="" type="checkbox"/> Include Expanded Description?
Entry: Demo			<input type="checkbox"/> Include Inactive Users?
Role Name	Description		
Accounting Manager	Accounting Manager		
User ID	Name		
Module	Menu	Menu Item	Type of Access
Purchasing & Payables	Purchasing	Control Panel	Read Only
		Description:	Use this option to create, edit, and view purchase requisitions and work with purchase orders.
		Actions:	Return a requisition Revise a purchase order Void, close or open a purchase order Copy Requisition PO Display purchase order history Print preview a requisition or purchase order Print PO Pay History Display the Approval Log Manage Documents attached to POs
		Purchase Requisitions	Read Only
		Description:	Displays the requisitions awaiting your approval. In addition, the Actions menu of this screen enables you to perform the following tasks:
			Check budget Check vendor alerts Show vendor alerts in grid View the requisition Return the requisition to the originator Return the requisition to the prior approver Approve Requisition Quick Approval
		Print Requisitions	Read Only
		Description:	Use this screen to select the requisitions you want to print, along with the number of copies and some options available for printing. Use the Save Settings option on the Actions menu to have these settings default each time you print requisitions.
		Purchase Order Approval	Read Only
		Description:	Use this screen to convert purchase requisitions to purchase orders. Options on the Actions menu enable you to:
			Check available budget Check for vendor alerts Show Vendor Alerts in Grid View selected requisitions Return the requisition to the Originator Return the requisition to the Prior Approver Create a PO from the requisition
		Print Purchase Orders	Read Only
		Description:	Print Purchase Orders:
			Select the purchase orders you want to print or email, along with

Printed: 03/25/2011 9:10:23 AM Report: rptVUserRoleListing 2.8.05 Page: 1