iVisions Accounting

Business Administration

Student Guide

COURSE PREREQUISITES

- None

COURSE OVERVIEW

This guide is for the person responsible for the administration of the iVisions Web Portal. From managing users, allowing Employee Self Service (ESS) and My Workflow access to customizing the portal, the guide reviews the most common administrative functions.

Notes Legend

NOTE TIP BEST PRACTICE WARNING

infinite visions
a tyler school solution

Revised: April 2019

This document applies to Infinite Visions Enterprise Edition Accounting version 2019.1 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.

Table of Contents

iVisions Overview

Section Topics

- About iVisions
- Navigate iVisions

Introduction

This section provides a general overview of the Business Administration functionality and introduces the SuperUser to the navigation tools available in iVisions ESS.

ABOUT IVISIONS

Overview

iVisions gives different groups of employees at a school district access to important Infinite Visions financial, payroll and human resources information in a secure, web-browser environment. Depending on the type of employee and their role at the district, user roles secure the level of access to the data. There is never a need to worry about sensitive information falling into the wrong hands.

From the perspective of a district employee, iVisions can present the following types of information:

- Important District Wide Announcements
- Employee Paycheck, W2, and Tax Withholding Forms
- Employee Profile and Demographic Data
- Online Benefits Enrollment (Additional License Required)
- Electronic Acceptance or Rejection of Employee Contracts
- Employee Leave Portal for Submitting Leave Requests
- Employee Expense Reimbursements (Additional License Required)

From the perspective of a school site or department administrator, iVisions provides access to all the above as well as options to:

- Initiate and approve workflow items like requisitions, purchase orders, ePARs, budget journal entries, invoices, time worked, and leave requests
- Run important financial reports to verify current expenditures and budget balances
- Create employee performance evaluations
- Process payments for receivables
- Review current staffing levels and vacancies

The iVisions Web Portal can be branded by uploading the district logo and by changing the color scheme to something in line with district colors to make it feel like a more organic part of the district website. Many districts create a link to iVisions directly from the primary district website.

This guide focuses on some of the important tools and set up tasks available to an iVisions Administrator.

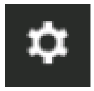
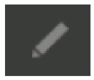
NAVIGATE IVISIONS

Overview

There are several icons found within iVisions. Each icon has a unique purpose. Let's explore each one.

ICONS

ACTIVITY FEED ICON	DESCRIPTION
	Click this icon to compose a new email message.
	Click this icon to check for notifications.
SuperUser Account	Click the Visit My Profile icon to work with the logged in User's Account.
PERSONA BAR MENU ICON	**DESCRIPTION**
	Click the DNN icon to view the current DNN version, Server Name, and to Logout of iVisions.
	Click the Content icon to open the Pages menu (Add, Edit, or Delete a Page) and access the Recycle Bin.
	Click the Manage icon to manage the following: • Add, Modify, and Delete Users • Add, Modify, and Delete Roles • Site Assets (File Manager) • Global Assets (Root File Manager) • Add Themes

ACTIVITY FEED ICON	DESCRIPTION
	Click the Settings icon to configure the following: • Site Settings (Add Logo) • Extensions (Install New Modules) • Servers (Add SMTP Port)
	Click the Edit icon to perform the following: • Add a module to a page • Add an existing module • Add, Edit, or Modify Pages

SECTION SUMMARY

In this section, we discussed the setup planning and considerations for employees and the district within the Portal.

In the next section, we discuss SuperUsers, Users, and Roles.

SECTION ASSESSMENT

1. List 3 of the many types of information an Employee can access within iVisions.
   a. ____
   b. ____
   c. ____

User Roles, Users, and SuperUsers

Section Topics

- Create a User Role
- Work with User and SuperUser Accounts

Introduction

When a user logs into the iVisions Employee Self Service portal, their assigned User Role defines what resources are available. User Role management allows the Administrator to assign like employees to the same User Role; thus making management of the District's portal simpler.

When adding new users, always assign them to the appropriate User Role.

It is common for users to be assigned multiple user roles.

CREATE A USER ROLE

Overview

iVisions gives different groups of employees access to important Infinite Visions financial, payroll and human resources information in a secure, web-browser environment. One of the first steps during the portal setup is determining what access to assign to each User Role.

By default, the Administrator role is assigned to all pages and modules.

Activity *(Required)*

Manage > Roles

In the following activity, we create an Admin Assistant role to assign to District Administrative Assistants who need access to the My Staff page.

Add a Role

1. Log into the portal as **host | host**
2. Hover over the **Manage** icon.
3. Click **Roles**.
4. Click **Create New Role**.
5. Complete the following fields:

FIELD NAME	VALUE
Role Name	Admin Assistant
Description	Assign to all Administrative Assistants

6. Click **Save**. The Role has been created successfully message displays.
7. Click the **x** to exit the Roles window.

Add a User to a Role

1. In the **Search Roles by Keyword** field in the **Roles** window, type “Admin Assistant” and click the **magnifying glass**.
2. Click the **Users in Role** icon.
3. In the **Begin typing to add a user to this role** field, type “Barb Wire.”
4. Click **+Add**. Barb appears in the Administrative Assistant role list.

WORK WITH USER AND SUPERUSER ACCOUNTS

Overview

When logged into iVisions as a SuperUser, rights are given to change portal settings in a manner no other employee or workflow user would ever have. The Host user is the most powerful of the users. Typically, only 1 Host level account is used for administering the web portal.

Activity *(Required)*

Manage > Users

Create a User

1. Hover over the **Manage** icon.
2. Click **Users**.
3. Click **Add User**.
4. Complete the following:

FIELD NAME	FIELD VALUE
First Name	District
Last Name	Administrator

FIELD NAME	FIELD VALUE
Username	DAdmin
Email Address	Administrator@ccsd.k12.iv.us
Authorized	On
Random Password	Off
Password	Passw0rd
Confirm Password	Passw0rd
Send an Email To New User	Unmarked

5. Click **Save.** The user created successfully message displays. The user appears in the User Grid.
6. Click the **x** to exit the Users window.

Activity *(Required)*

Manage > Users

In the previous activity, we created the District Admin User. In this activity, we turn the District Admin User into a SuperUser.

Create a SuperUser

1. In the Search Users field in the **Users** window, type "District Admin."
2. Click the **magnifying glass** to filter on the District Admin user.
3. From the **Ellipsis** dropdown, select *Make SuperUser*.
4. Click the **x** to exit the Users window.

USER ROLES, USERS, AND SUPERUSERS

Be careful! Deleting a User Role does not delete users assigned to the role.

The SuperUser account has its own menu on the left of the portal called a Persona Bar. The Persona Bar has special functions specific to the SuperUser accounts.

When the portal is initially set up, the SuperUser account password is defaulted to host. Tyler Deployment team will change the SuperUser password before any additional portal setup.

If the SuperUser password is forgotten, contact Infinite Visions Support for assistance with resetting the password.

It's important to remember when signed in as SuperUser; the portal does not display as a regular employee or workflow user would see it. The portal displays in design mode, the data an employee or workflow user sees is not visible. After making changes to the design of the portal, log out and log back in as a regular employee or workflow user to get a sense of how the changes have impacted what the user sees.

SECTION SUMMARY

In this section, we discussed the setup planning and considerations for employees and the district within the Portal. We also reviewed creating user roles, users, and superusers.

In the next section, we review the setup and configuration of pages and modules.

SECTION ASSESSMENT

1. List 3 of the many types of information an Employee can access within iVisions.
   a. ____
   b. ____
   c. ____The default SuperUser password is:
   a. host
   b. admin
   c. site admin

Pages and Modules

Section Topics

- Add a Page and Module
- Customize Portal
- Portal Alias
- SMTP Setup
- Upload Extensions
- Tyler Connection Manager

Introduction

As an administrator, customize the web portal by deleting and disabling pages no longer needed and by adding additional pages and modules as needed to display new information. Also, put the district touch on the page by uploading the district logo and applying district colors.

ADD A PAGE AND MODULE

Overview

Pages and/or modules are added to display information from Infinite Visions or other resources offered within iVisions or the Web.

Activity *(Required)*

Content > Pages

The following activity focuses on retrieving information from Infinite Visions.

Add a Page

SCENARIO: The district has just configured a new page in Human Resources called Compensation Statements. The page displays an employee's total value of their annual compensation including employer-paid benefits and value of their leave balances. The HR and Finance director understand this information can be made available in the iVisions ESS for employees to review. They have asked for the page to be set up under the Pay/Tax Information page.

1. Log into iVisions ESS as **Host| host**.
2. From the **Content** menu, select *Pages.*
3. Click **Add Page**.
4. In the **Name** field, type "Your Total Compensation." The Name field displays on the menu bar.
5. In the **Title** field, type "Total Compensation." The Title displays on the HTML tab.
6. Scroll down. Verify the **Display in Menu** switch is in the **On** position.

If the Title field is left blank, DNN9 will use a combination of the website name and the Name of the page as the title.

7. Click the **Permissions** tab.
8. In the **Begin typing to add a role** field, type “Employees.”
9. Click **+Add**. The role is added to the page.
10. Mark the **View** checkbox for the Employee role.
11. Click the **Advanced** tab. Then, click the **MORE** tab. Verify the **Disable Page** switch is in the **Off** position. This enables the page to be viewed in the portal.
12. Click **Add Page**.

To have a page visible for a specific time frame activate the Enable Scheduling option.

Move a Page

SCENARIO: Human Resources asked for the Your Total Compensation page to reside under the Pay/Tax Information menu. Move the Your Total Compensation page below the Direct Deposit page under the Pay/Tax Information menu.

1. Drag the **Your Total Compensation** page up to the **Pay/Tax Information** page.
2. Drop the **Your Total Compensation** page in the right pane under the **Direct Deposit** page.
3. Close the **Pages** window.

Activity *(Required)*

Pay/Tax Information > Your Total Compensation

The following activity focuses on adding a module to a page.

Add a Module to a Page

SCENARIO: The creation of the Total Compensation page is complete. Add the WMG Total Compensation module to the content pane.

1. Stay logged in as **host | host.**
2. Navigate to **Pay/Tax Information > Your Total Compensation**.
3. Click the **Edit** icon (pencil turns blue). The page refreshes into edit mode displaying various panes on the page.

4. Click **Add Module** option from the edit bar. The Add Module window displays with all installed modules.
5. In the **Search** field, start typing "WMG Total Compensation." The WMG Total Compensation module displays.
6. Click on the **WMG Total Compensation** module. The module hovers over the page.
7. Drag the **module** to any pane on the page.

> Position a module on a page by dragging and dropping the module or once positioned by selecting a pane from the Move menu.

8. From the **Move** menu, select *To Content Pane*. The module moves to the upper area of the page. If the To Content Pane option is step 7 was completed correctly and the module already resides in the content pane.
9. From the **Cog** menu, select *Settings.*
10. Click the **Permissions** tab.
11. From the **Select Role** dropdown, select *Employees*. Then, click **Add.** And, leave the **Inherit View permissions from Page** checkbox marked.
12. Click the **WMG Total Compensation Settings** tab.
13. From the **Please select a IVEE connection group** dropdown, select the *appropriate connection group*.
14. Click **Update** to close the window.

Most modules are not available for view by a SuperUser. To verify the module is configured and functioning properly log into iVisions as an employee.

Activity *(Required)*

Home

In the previous activity, a page and module were added to display Infinite Visions data.

The following activity walks through adding a link module to display useful information from other sources.

Add a Link Module

SCENARIO: The Superintendent would like a link to the Association of School Business Officials International website added to the Home page.

1. While still in **Edit** mode, click on the **Home** page.

2. Click **Add Module**.
3. In the **Search** field, type "*Link*." Click the **Link** module. The module hovers over the Home page.
4. Drag and drop the **Link** module in the two panes below the **Employee Link** module. The Link module aligns with the Employee Link module.
5. From the **Edit** menu, select *Add Link*.
6. Complete the following fields:

FIELD NAME	FIELD VALUE
Title	Association of School Business Officials International
Location	http://www. asbointl.org
Link	Mark Open Link in New Browser Window
Roles	Mark All Users

7. Click **Update**.

CUSTOMIZE PORTAL

Overview

One of the most important things the iVisions Web Portal Business Administrator can do is to brand the portal by adding the district logo and changing the skin colors to match the district colors.

Activity *(Required)*

Persona Bar >Settings > Site Settings

Uploading the district logo adds a personal touch to the page.

The following activity walks through the process of uploading the logo.

Upload a Site Logo

1. From the **Persona Bar**, hover over **Settings** and select *Site Settings*.
2. In the **Site Logo** window, click **Upload a File***.* The Open window displays.
3. Browse to *C:\Infinite Visions\File Attachments\iVisions* and double-click **TylerTech_ERP.jpeg**. The image appears in the Site Logo window.
4. Click **Save.** The Settings have been updated message displays.

For best results, Tyler suggests using an image size of 640 x 120.

Activity *(Required)*

Persona Bar > Manage > Themes

In addition to adding the district logo, change the portal appearance by applying a theme to match the district colors or to identify a specific area of the portal.

The following activity walks through the process of adding a theme.

Add a Theme

1. From the **Persona Bar**, hover over **Manage** and select *Themes*. The Themes window appears.
2. On the **iVisionsRed** theme, click **Preview**. The portal theme changes to Red.
3. Return to **Persona Bar > Manage** > **Themes**.
4. On the **iVisionsBlue** theme, click **Apply**. Click **Confirm** to apply the theme. The theme reverts to blue upon next login.

Only apply the following Themes to the iVisions ESS Portal:

- iVisionsBlack
- iVisionsBlue
- iVisionsGreen
- iVisionsOrange
- iVisionsRed
- iVisionsYellow

Activity *(Required)*

Persona Bar > Content > Pages

Occasionally, there may be a need to disable a page in the iVisions ESS Portal.

The following activity walks through disabling a page.

Disable a Page

1. From the **Persona Bar**, hover over **Content** and select *Pages*.
2. Click **Self Service**. The Self Service menu display.
3. Select *Coursework*.
4. Click the **Settings** icon. The Coursework settings page displays.
5. Toggle **Display in Menu** from On to Off.

6. Click **Save**. The Coursework page no longer displays in the Self Service menu.

PORTAL ALIAS

Overview

A portal alias is a combination of a domain name, and a folder entered as the URL to access a portal site. A portal can answer to an unlimited number of portal aliases. An alias maps a URL to a portal site.

Activity *(Required)*

Persona Bar >Settings > Site Settings > Site Behavior > SITE ALIASES

The following activity walks through the process of adding a Site Alias.

How to Add a Site Alias

1. Log into ESS as **host | host.**
2. Navigate to **Persona Bar >Settings > Site Settings > Site Behavior > SITE ALIASES**.
3. Click **+ Add Alias.** The SITE ALIASES window displays.
4. In the **Site Alias** field, enter the **URL**.
5. Click **Save** to exit the window. The URL appears in the Site Alias list.

SMTP SETUP

Persona Bar >Settings > Servers

Overview

For user registration and other iVisions emails to get to their appointed destination, an SMTP server must be specified. Specify a server in one of the following ways:

- Computer name (e.g., MAILSERVER)
- IP Address (e.g., 127.0.0.1)

- URL (e.g., smtpauth.earthlink.net)

Activity *(Required)*

The following activity walks through the process of adding a Site Alias.

Setup SMTP

1. Log into ESS as **host | host.**
2. Navigate to **Persona Bar >Settings > Servers > Server Settings**.
3. In the **SMTP Server and port field**, enter the **SMTP Server and Port** Information.
4. Click **Test SMTP Settings** to validate the connection.
5. Click **Save.** The Saved Successfully message displays.

UPLOAD FILE EXTENSIONS

Persona Bar > Settings > Security > More > MORE SECURITY SETTINGS

Overview

To allow the portal user or superuser to upload documents (other than the system defaults – jpg, jpeg, jpe, gif, bmp, png, doc, xls, ppt, pdf, txt, xml, xsl, css, zip) to the web portal, the allowable file extensions must be entered in the Allowable File Extensions field Persona Bar > Settings > Security > More > MORE SECURITY SETTINGS. After making the changes, click Save to save the changes.

SMTP SETUP

My Workflow

Overview

The Tyler Connection Manager utility is used to manage the IVEE Connection Group for most iVisions Web Portal modules.

This utility is available for Admin and Host users only.

Activity *(Required)*

The following activity walks through the process of adding a Site Alias.

Manage Portal Connections

1. On the Persona Bar, click **Edit**.
2. On the ESS menu bar, click **My Workflow**.
3. Click the **pencil** icon and select *Manage Portal Connections*.
4. To change the connection group for an iVisions module, select the applicable group from the **IVEE Connection Group** dropdown.
5. Click **Save.**

SECTION SUMMARY

In this section, we learned how to add pages, modules, and customize the ESS portal.

In the next section, we discuss the setup of Employee Self Service and Payroll/Tax information.

SECTION ASSESSMENT

1. A page must be added to a Module.
   a. True
   b. False
2. Tyler suggests using what size image for a logo?
   a. 120 x 640
   b. 640 x 120
   c. 600 x 100
3. Multiple email addresses can be added to the SuperUser Email field.
   a. True
   b. False
4. Only Themes beginning with _______ are used in the ESS portal.
   a. Granite
   b. iVisions
   c. ESS

Employee Self Service (ESS)

Section Topics

- Register and Link Employees to ESS
- Self Service
- Pay/Tax Information
- Work with Employee Benefits

Introduction

The iVisions Web Portal provides employee access to Payroll/Human Resources information anytime, anywhere.

REGISTER AND LINK EMPLOYEES TO ESS

Overview

On the iVisions home page, use the Tyler Employee Link module to give employees an easy way to register as a portal user. Once an employee is registered, the system creates a link back to the employee's record in Infinite Visions Payroll/HR > Employees > Employee Maintenance.

Activity *(Required)*

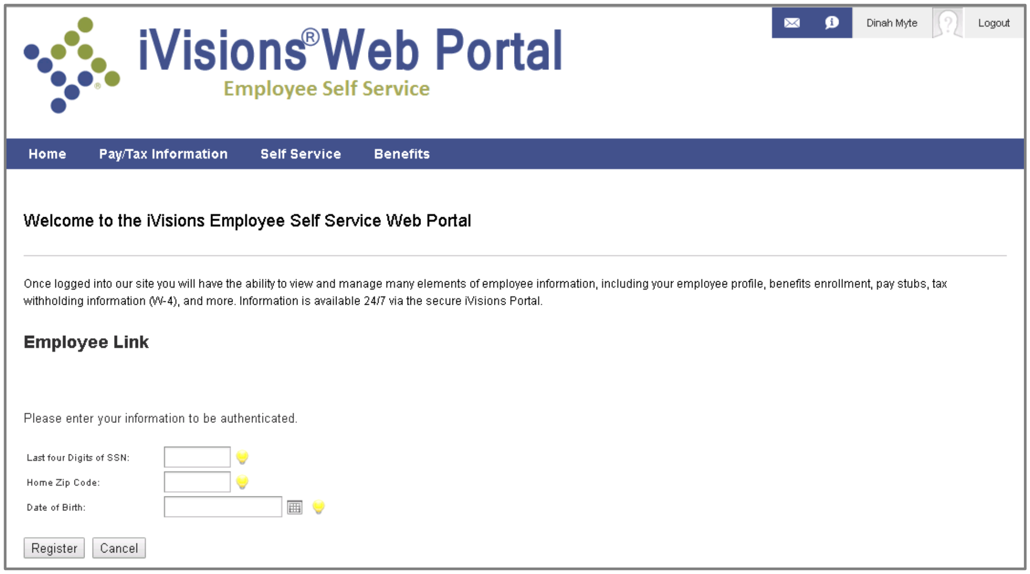
iVisions > Home Page

Register in the Portal

1. Log into the Portal using the following credentials:

FIELD NAME	FIELD VALUE
User Name	PLoafer
Password	Passw0rd

The first time a new employee visits iVisions and logs in with the credentials supplied by the district, the following message displays: "Please enter your information to be authenticated." (e.g., Last 4-digits of SSN, Home Zip Code, and Date of Birth).



iVisions Web Portal Welcome Page

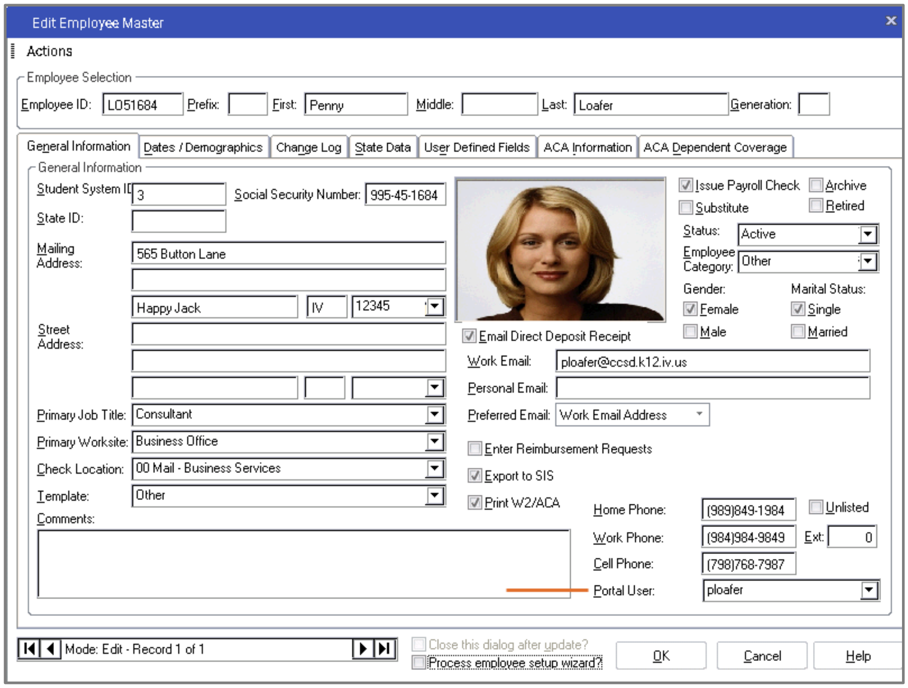
2. Enter PLoafer's authentication information:

FIELD NAME	FIELD VALUE
Last four digits of SSN	1684
Home Zip Code	12345
Date of Birth	7/11/1968

3. Click **Register**.

When the user clicks Register, the system validates the information entered against the records in IVEE > Payroll/HR > Employee Maintenance. If the information matches an employee record, it displays their name and address and a Link button for the employee to click if the information is correct. The employee is now registered and is assigned an iVisions user role (Employee).

4. Click **Link**.



Now, Penny Loafer's **Portal User** field on the General Information tab in IVEE > Payroll/HR > Employee Maintenance is automatically updated to display her portal username. Penny is now an authorized portal user.

Identify registered and unregistered users in Security > Workflow Configuration > Employee Portal Registration.

SELF SERVICE

Overview

The Self Service menu displays for all district employees who have registered. From the Self Service menu, employees can update their name and address information, review and accept/reject contracts, enter and submit time off requests, and more.

Logout of iVisions ESS as PLoafer and log in as OMoney/v.

Information Center

Self Service > Information Center

Use the Information Center to provide important announcements, links, and documents for Employees.

Profile

Self Service > Profile

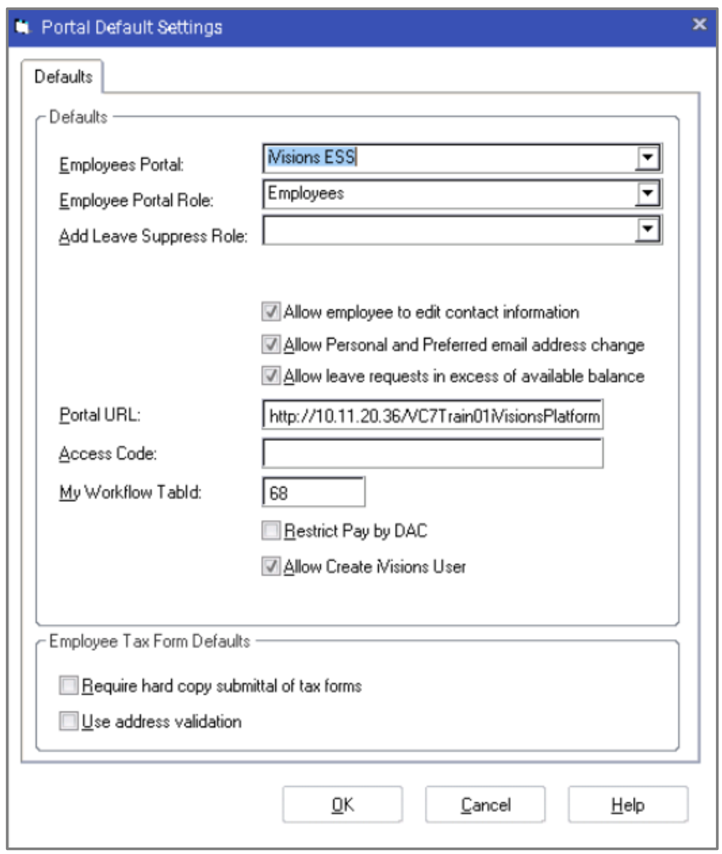
The Profile menu provides employee access to and the ability to update their personal contact information and emergency contact information.

Activity *(Required)*

If an entity allows employees to modify contact information, there is a couple of default set up items to review and mark as applicable. Follow the instructions outlined below:

Review Portal Default Settings

1. Log into Infinite Visions as **Omoney | v.**
2. Navigate to **IVEE > Security > Workflow Configuration > Portal Default Settings**. The Portal Default Settings window displays.



Portal Default Settings window

3. Verify the **Allow employee to edit contact information** checkbox is marked to allow employees to modify information (e.g., address, phone, etc.) in the portal.

4. Verify the **Allow Personal and Preferred email address change** checkbox is marked to allow employees to update their current email address and replace with a new address.

> If employees are allowed to modify their information (checkboxes marked), a Modify button displays at the bottom of the employee's Home page.

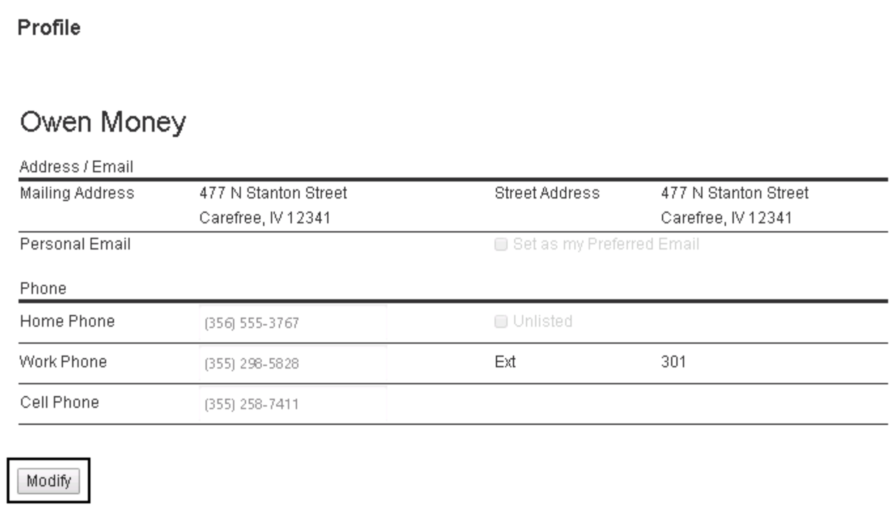
5. Click **OK** to exit the default settings.

Activity *(Required)*

After configuring the portal default settings, an employee can modify their contact information in the iVisions Web Portal following the steps below:

Personal Contact Information

1. Navigate back to **iVisions ESS > Self Service > Profile**. The employee Profile page displays.



Employee Profile

2. Click **Modify**. The Profile window displays.

3. Enter the last 4 digits of Owen's Social Security Number "**4464**".
4. Click **Submit**.
5. Change his **Employee Mailing Address** to "123 Green Road".
6. In the **Effective Date** field, type "8/6/20xx". This date is the effective date of the change. If the field is left blank, the system uses the current date by default.
7. Click **Submit**.

   Tyler suggest printing a copy for your records

8. Click **Return**. The change automatically routes to HR/Payroll without requiring any approvals.

Emergency Contact Information

Self Service > Profile

The Emergency Contacts grid, at the bottom of the Profile window, displays the current emergency contacts on file with the district. View, update, and delete existing contact information or add a new contact as necessary by clicking the magnifying glass next to the contact to edit. The Edit Emergency Contact window displays. After making changes, click Update Contact or if the contact is no longer valid, click Delete Contact.

Activity *(Required)*

It is important for the district to have accurate emergency contact information on file. Make sure to review, update, and add contacts as soon as things change. For training purposes, walk through adding a new emergency contact using the scenario outlined in the following activity.

Add an Emergency Contact

SCENARIO: In reviewing his profile, Owen realized he has forgotten to add one of his closest friends as an emergency contact and wanted to take care of it immediately.

1. Below the Emergency Contacts grid, click **Add New Contact**.
2. In the **First Name** field, type "Del".
3. In the **Last Name** field, type "Monty".
4. In the **Pri Phone** field, type "5201234567". It is not necessary to type the hyphens (-) as the number is automatically formatted.

   First Name, Last Name, and Pri. Phone are required fields denoted with a yellow light bulb.

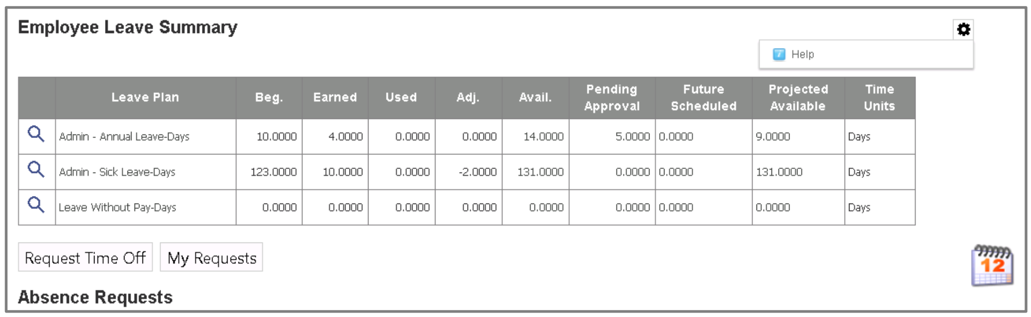
5. Click **Add Contact** to return to the original Profile window. The Emergency Contact grid is updated to display the newly added contact.

> An employee can update an existing contact by clicking the magnifying glass to the left of the contact name. The Edit Emergency Contact window displays. After making changes, click Update Contact. In the Edit window, click Delete to remove the contact.

Time Off

Self Service > Time Off

The Time Off resource displays the Employee Leave Summary for all applicable leave plans published to the web portal.



Employee Leave Summary

Help

	Leave Plan	Beg.	Earned	Used	Adj.	Avail.	Pending Approval	Future Scheduled	Projected Available	Time Units
	Admin - Annual Leave-Days	10.0000	4.0000	0.0000	0.0000	14.0000	5.0000	0.0000	9.0000	Days
	Admin - Sick Leave-Days	123.0000	10.0000	0.0000	-2.0000	131.0000	0.0000	0.0000	131.0000	Days
	Leave Without Pay-Days	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	Days

Request Time Off | My Requests

Absence Requests

Employee Leave Summary

From this window, employees can perform the following: Request Time Off and view My Requests. Request Time off displays the wizard to walk through the request process. My Requests allows an employee to view requests by filtering on Request Status (Denied, Pending, Processed, or Used). From this window, employees can delete a request and review the request approval log by clicking the appropriate icon to the right of the request.

From the Employee Leave Summary window, employees can click the magnifying glass next to the leave plan to view Detail Leave Plan information.

Also, an employee can click the calendar icon to view their leave requests on a weekly/monthly calendar. Easily identify Leave Taken and submitted Leave Requests by the color noted in the legend.

Let's look at the required Infinite Visions setup and the process for employees to submit/review time off requests in the web portal.

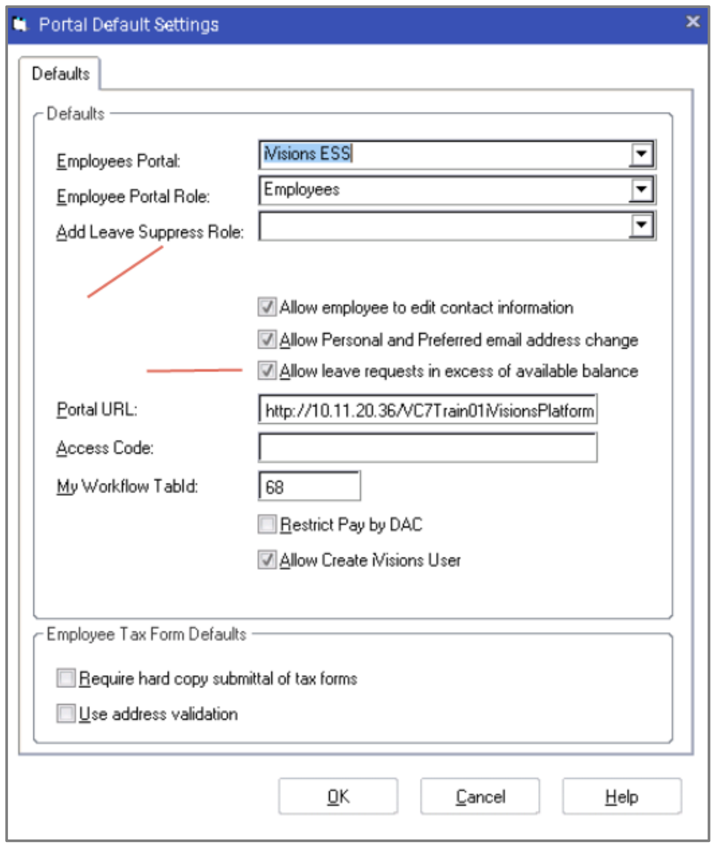
Submitting a time off request is easy. Using the Portal, employees can request leave from their computer or mobile devices at any time of the day or night.

Activity *(Required)*

Infinite Visions > Security > Workflow configuration > Portal Default Settings

There are a couple of default setup items to consider when allowing employees the ability to review leave plan information and submit time off requests in the web portal.

Review Portal Default Settings



Portal Default Settings

1. If applicable, from the **Add Leave Suppress Role** dropdown, select a user role. If selected, all employees with the assigned user role are restricted from submitting time off requests in the web portal.

   If a role is selected, the individual leave plan's Publish Type option is overwritten, and employees assigned the selected role are unable to submit requests. In iVisions > ESS > Self Service > Time Off, the Request Time Off button does not display in the Employee Leave Summary window.

Let's look at a couple of real-life scenarios where a group of employees should not submit requests.

SCENARIO A: The district has their employees entering time off through a time card interface system and does not want any employee to enter time off requests through iVisions Web Portal to prevent duplicate requests from being submitted.

In this scenario, select Employee from the Add Leave Suppress Role dropdown. All registered iVisions Web Portal users have this role assigned by default, so this is an effective way to prevent anyone from submitting a request through the portal.

SCENARIO B: The district has several different leave entry systems in place for different groups of employees. Certified personnel use a Sub Tracking Interface, Classified personnel use a Time Card Interface, and the district wants all other employees to submit time off request through the web portal.

In this scenario, create a new iVisions security role named Certified-Classified and assign the role to all certified and classified employees. If this role is selected from the Add Leave Suppress Role dropdown, employees assigned the role do not have access to the Request Time Off button in the Employee Leave Summary window.

2. Mark the **Allow leave requests in excess of available balance** checkbox if employees can request time off even if there is no available balance for the selected leave plan.
3. Click **OK** to save the settings.

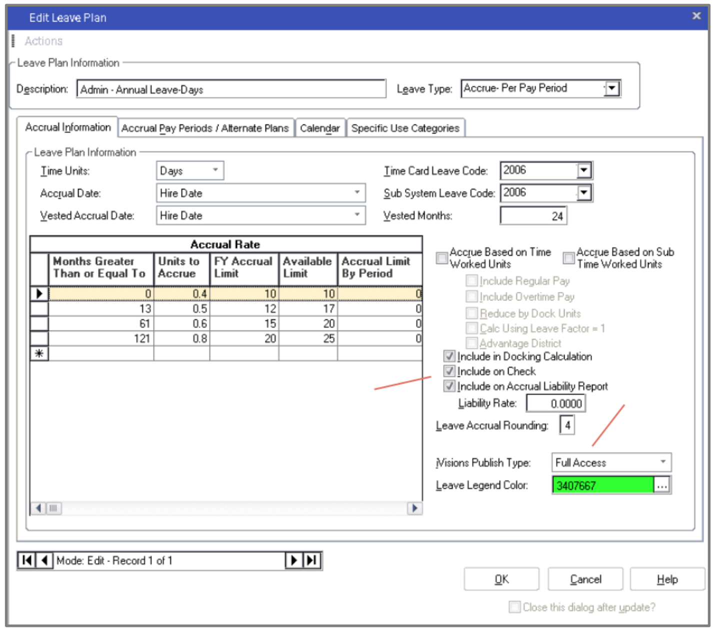
Publish Leave Plans to the Web Portal

Infinite Visions > Payroll/Human Resources > Leave Plans > Leave Plan Maintenance

For a leave plan to display in the Employee Leave Summary window, the leave plan must have the Include on Check checkbox marked and an iVisions Publish Type selected on the leave plan.

Follow the steps outlined below to publish the leave plan to the portal:

1. In the Leave Plans grid, double-click the **Admin - Annual Leave-Days** leave plan. The Edit Leave Plan window displays.



Edit Leave Plan window

2. From the **iVisions Publish Type** dropdown, note the following publish types:

   Full Access – Employees can review the leave plan information and submit time off requests.

   Read Only – Employees can only review the leave plan activity.

   Don't Show – The leave plan does not display in the Employee Leave Summary window.

3. Verify the **Include on Check** checkbox is marked.
4. Click **OK** to close the Edit Leave Plan window.

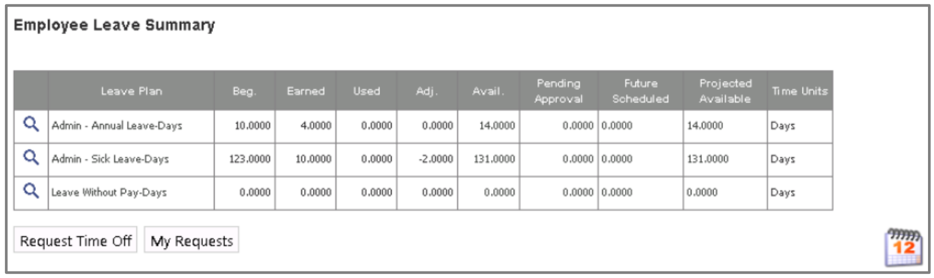
Activity *(Required)*

The following activity walks through the process of how an employee submits a time off request using the Request Time Off wizard.

Submit a Time Off Request

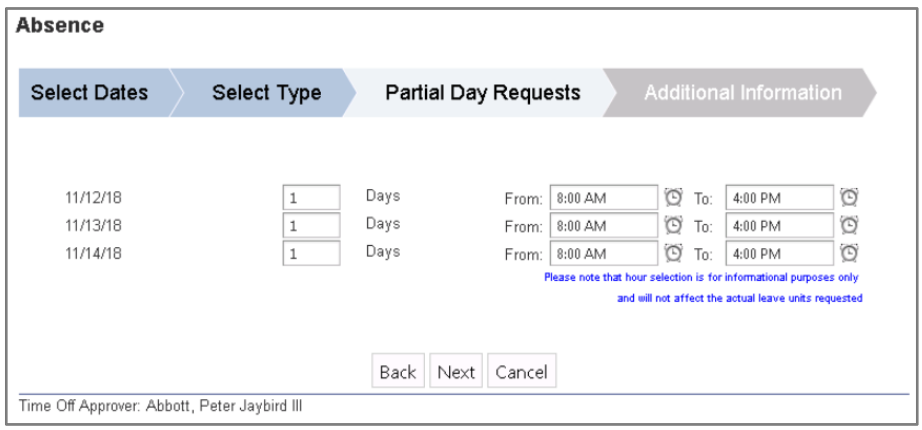
SCENARIO: Business Manager, Owen Money, needs to take a day off to learn how to install an infant car seat properly. He and his wife are expecting a new baby any day and his wife has been adamant about making sure he knows the proper way to take the car seat in and out of the car. She is quick to reference several studies stating 85% of car seats are installed improperly.

1. From the Self Service menu, select *Time Off*. The Employee Leave Summary window displays.



Employee Leave Summary window

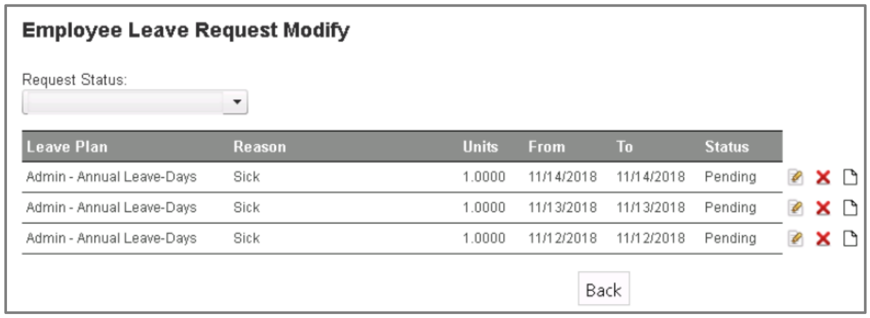
2. Click **Request Time Off**. The Select Dates tab displays. Use the leave plan calendar to select the date(s), as applicable.
3. Click **Next**. The Select Type tab displays. Select the applicable leave plan.
4. Click **Next**. The Partial Day Requests tab displays.



Partial Day Requests tab

5. Click Next. The Additional Information tab displays. In the **Reason** field, type “Sick.”
6. If required, from the **Specific Use** dropdown, select the applicable option. This field is only active if Specific Use Categories are defined for the leave plan in Payroll/HR > Leave Plans > Leave Plan Maintenance > Specific Use Categories tab.
7. In the **Note** field, type “Child’s Dr. Appointment.”
8. Click **Submit Request** to begin routing the request through the approval process (if defined) beginning with the Time Off Approver (as shown in the lower left corner). The Employee Leave Request Modify window displays.

The standard time off request routing is set to route from the employee submitting the request to the person who displays in the Supervisor field on their positions and pay record (IVEE > Payroll/Human Resources > Employees > Employee Positions and Pay).


Employee Leave Request Modify

Request Status:

Leave Plan	Reason	Units	From	To	Status
Admin - Annual Leave-Days	Sick	1.0000	11/14/2018	11/14/2018	Pending
Admin - Annual Leave-Days	Sick	1.0000	11/13/2018	11/13/2018	Pending
Admin - Annual Leave-Days	Sick	1.0000	11/12/2018	11/12/2018	Pending

Back

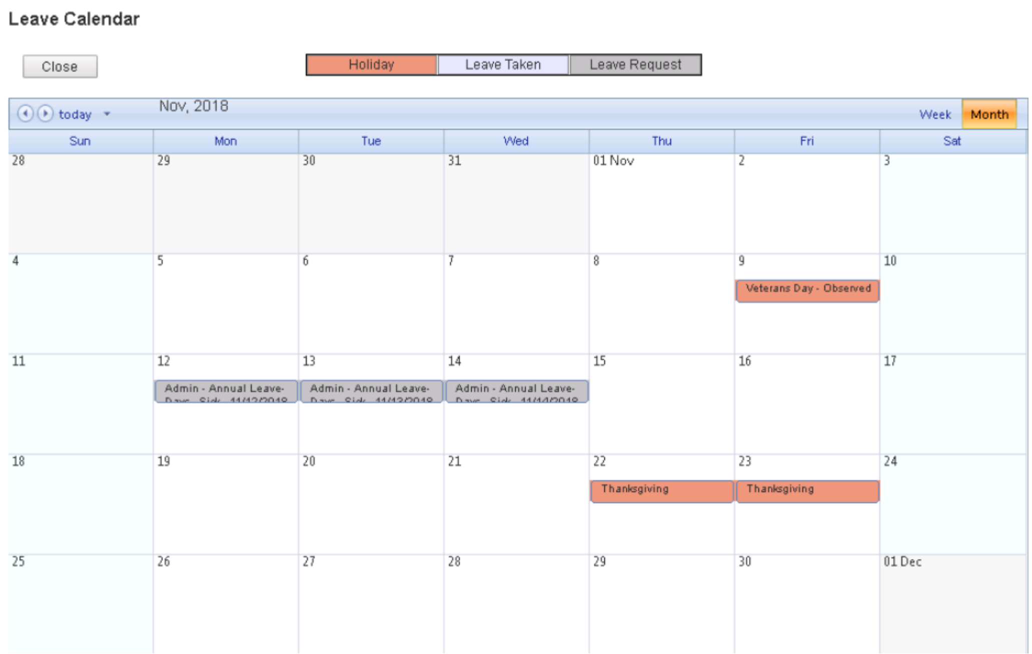
Employee Leave Request Modify window.

From the Request Status dropdown, employees can choose to display requests with a Denied, Pending, Processed, or Used status. Also, employees can cancel a pending request and review a requests approval log by clicking the appropriate icon next to the request.

9. Click **Back.** The Employee Leave Summary window displays.

On the Employee Leave Request Modify window, employees can review their request history by clicking My Requests. The Leave Requests window displays. An Employee can also review their leave request activity in a weekly or monthly calendar format.

10. Click the **Calendar** icon.



Leave Calendar

Holidays, Leave Taken, and Leave Requests display and are shaded as identified in the legend.

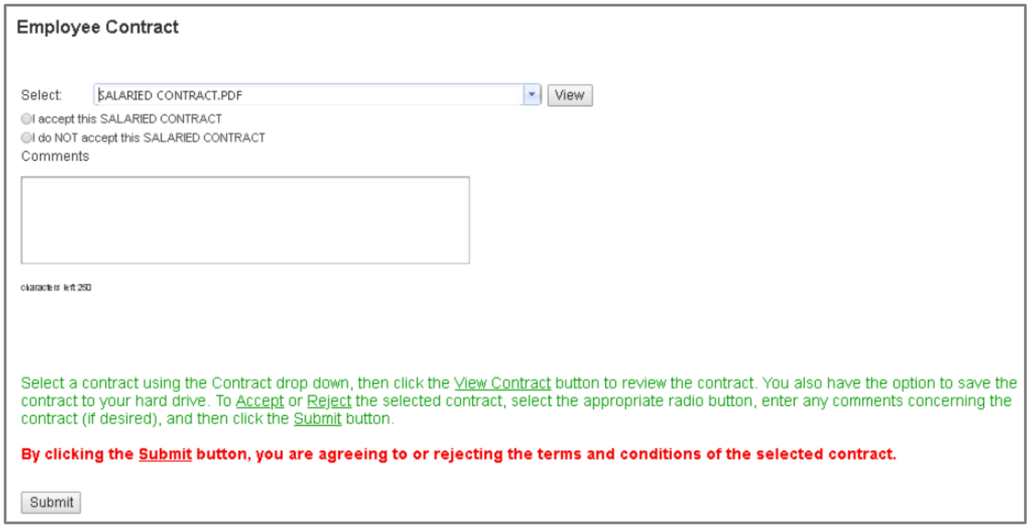
11. After reviewing the calendar, click **Close**. The Employee Leave Summary window displays.

Contract Acceptance

Self Service > Contract Acceptance

This menu item is only available if the district has purchased the Human Resources module (license key required).

Contract Acceptance shows the Employee Contract window displaying their contracts published to the portal. Employees can view a selected contract and accept/not accept a contract by following the steps below:



Employee Contract window

Activity *(Required)*

It is important for the district to have accurate emergency contact information on file. Make sure to review, update, and add contacts as soon as information changes. For training purposes, walk through adding a new emergency contact using the scenario outlined in the following activity.

Accept a Contract

1. From the From the **Select** dropdown, choose the applicable contract. Only contracts published to the portal are available for selection.
2. Click **View** to open/save the contract.
3. Choose *I accept this,* or *I do NOT accept this*, as applicable.
4. In the **Comments** field, enter any pertinent information (up to 250 characters) for Human Resources.
5. Click **Submit**.

> Once an employee submits their contract response, it is available for HR to review. HR reviews the status of all published contracts in IVEE > Human Resources > Contracts > Contract Status (Portal). For more information on contracts, refer to the Help system.

Documents

Self Service > Documents

The Documents menu item displays the Employee Documents window (For Tyler Content Manager [TCM] users, the TCM viewer displays). A list of documents appended to the employee maintenance record by Human Resources or Payroll displays. The list includes the Document Type, Date Last Updated, and Last Updated By employee initials. The employee can click View to open the document.

HR Information

Self Service > HR Information

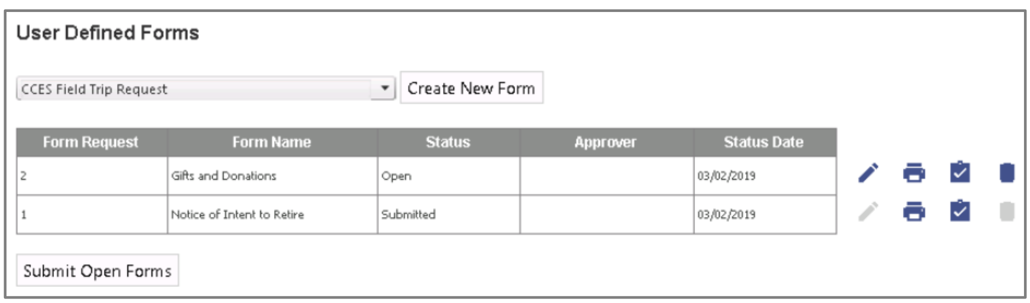
The HR Information menu item displays the Personal Information window. Employees can review a variety of information (e.g., certificates, endorsements, dependents, etc.) currently on file with Human Resources.

> If the district has not purchased the Human Resources module, the data grids are empty. Tyler suggests disabling the HR Information page, making it unavailable to employees.

User Defined Forms

Self Service > User Defined Forms

The User Defined Forms menu item displays the User Defined Forms window. From the dropdown, users can select a form to complete and submit to the district. Only user defined forms created in Infinite Visions and published to the portal are available for selection.



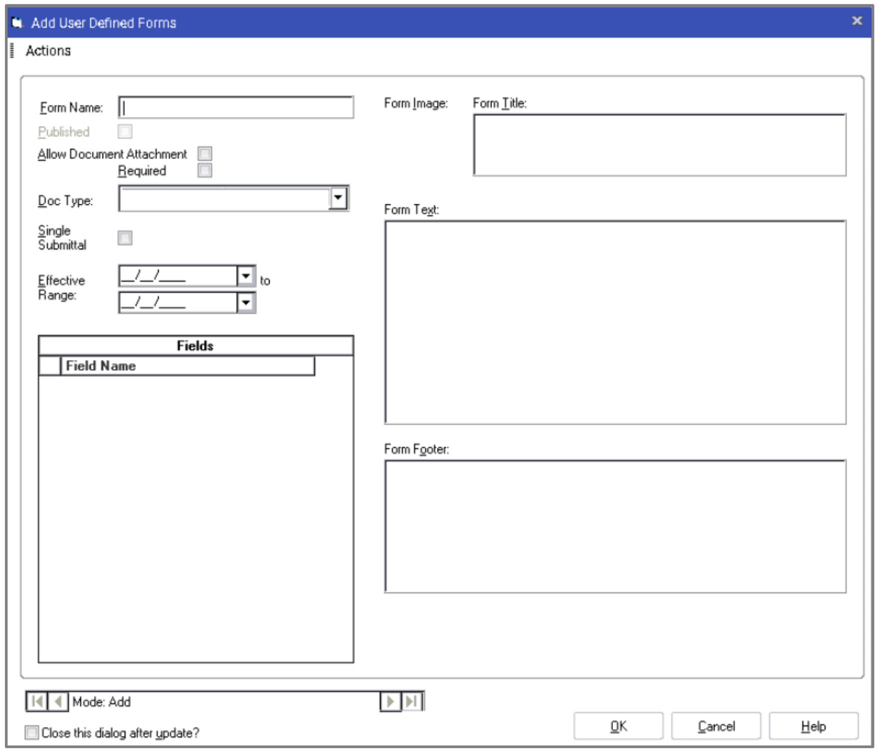
User Defined Forms window

Activity *(Required)*

It is important for the district to have accurate emergency contact information on file. Make sure to review, update, and add contacts as soon as things change. For training purposes, walk through adding a new emergency contact using the scenario outlined in the following activity.

Create a User Defined Form

1. Navigate to Infinite **Visions > Security > Workflow Configuration > User Defined Forms.**
2. Click **Add New Record** on the toolbar. The Add User Defined Forms window displays.



Add User Defined Forms window

3. Enter the following information:

FIELD NAME	FIELD VALUE
Form Name	Reserve a Lab
Form Title	Lab Reservation Form
Allow Document Attachment	Marked
Doc Type	Other
Single Submittal	Clear
Effective Range	N/A

FIELD NAME	FIELD VALUE
Form Text	Lab Requests must be submitted 5 working days in advance. Labs are expected to be monitored by a Teacher or ParaProfessional at all times. Take inventory each day.

For TCM users, the Doc Type dropdown displays the predefined TCM Document Codes.

4. Add the following fields:

DATA TYPE	FIELD NAME	REQUIRED	SORT ORDER	IVEE FIELD	VALUES
Drop Down	Site	Marked	1		CCES District HMS VHS
Text	Employee Name	Marked	2	Name	
Date	Reservation Start Date	Marked	3		
Date	Reservation End Date	Marked	4		
Text	Number of Laptops	Marked	5		
Drop down	Will printers be used?	Marked	6		No Yes
Drop down	Will printers be used?	Marked	6		No Yes
Drop down	Will projectors be used?	Marked	7		No Yes
Drop down	Will SmartBoard be used?	Marked	8		No Yes

When defining a user defined form, there are a few additional things to take into consideration (e.g., adding a form image, setting up approvers, and setting allowed groups). Follow the process below for adding these items to the user defined form.

5. From the **Actions** menu, select *Set Form Image*.
6. Navigate to **C:\Infinite Visions\File Attachments\iVisions\Computer Lab.jpg** and click **Open**. The image displays on the form.
7. From the Actions menu, select *Preview Form.* Review the form for grammar and typing errors. Then, **close** the preview window.

8. From the **Actions** menu, select *Setup Approvers.*
9. In the **Approval Type** box, select the *Neither* option.
10. From the **Approver** dropdown, select *Ester, Polly*.
11. In the **Rank** field, enter "1".
12. Mark the **Clear Approval Log on Return** checkbox.
13. Click **OK** to return to the Form window.
14. Click **OK** to return to the Forms grid.
15. Highlight the **Reserve a Lab** form in the grid.
16. From the **Actions** menu, select *Publish Selected Forms*.

> If a user defined form should no longer display in the portal, filter the grid to display the form. From the Actions menu, select UnPublish Selected Forms. The system clears the Published checkbox, and the form is no longer available in the web portal.

17. Navigate to **iVisions ESS > Self Service > User Defined Forms** to review the published form.

PAY/TAX INFORMATION

Overview

The Pay/Tax Information menu provides employee access to their pay information, tax forms, W-2, and direct deposit information.

Employee Pay

Pay/Tax > Employee Pay

The Employee Pay menu item used the Tyler Employee Pay module to display the employee check or direct deposit receipt issued through payroll and published (IVEE > Payroll > Payroll Processing > Publish Pay Information (Portal)) to the web portal.

For more information on publishing pay information to the portal, refer to the Help system or the Payroll Processing Training Guide.

Activity *(Required)*

The following activity walks through an employee reviewing and printing their earnings statement.

Review Employee Paycheck Information

SCENARIO: Owen Money, business manager at the school district, wants to go into iVisions and review his last paycheck for pay period #7.

1. From the **Pay/Tax Information** menu, select *Employee Pay*. The Payroll Earnings Statement for the latest pay period published by Payroll displays. If needed, select a different pay period from the Pay Date dropdown.
2. Click **Print Earnings Statement**. The Save popup bar displays.
3. Click **Open**, the Payroll Earnings Statement displays.

   At this time, employees are prompted for a password if an option displays in the Password field in Payroll > Payroll Processing > Publish Pay Information (Portal) window. For more information, refer to the Help system or the Payroll Processing Training Guide.

4. From the **File** menu, select *Print*. Close the document.

Paycheck Calculator

At the bottom of the Payroll Earnings Statement, there is a link to the Paycheck Calculator. The calculator is a third-party utility which allows employees to make changes to their current deduction or withholding amounts to see how the changes would affect their net pay before submitting the changes.

Activity *(Required)*

Review Employee Paycheck Information

SCENARIO: Owen Money, business manager at the school district, wants to go into iVisions and review his last paycheck for pay period #7.

1. On Owen's earnings statement, note the current Net Pay amount. Click **Paycheck Calculator**. A message displays.
2. Click **Submit**. The Paycheck Calculator displays.
3. From the **Federal Filing Status** dropdown, select *Married*.
4. In the **# of Federal Allowances** field, type "3".
5. Click **Calculate**. Note the new Net Pay of $19.
6. Click **Print Options** to view and select the applicable print option.
7. Close the Paycheck Calculator, the Employee Pay window displays.

Calendar Year Pay History

Pay/Tax Information > Calendar Year Pay History

The Calendar Year Pay History page uses the Tyler Calendar Year Pay History module to display pay accumulations up through the last pay period processed and published to the portal. Change the year as necessary and then click Show Statement to update the totals. Click the printer icon to print the statement.

Total Compensation

Pay/Tax Information > Total Compensation

If the district is using the Human Resources application, compensation statements can be set up, and the Tyler Total Compensation module can be used to display total annual comp (pay, benefits, leave balances, etc.) for an employee. Compensation reporting is set up in IVEE > HR > Reports > Compensation Statements. For more information about compensation statements, refer to the Human Resources Training Guide or the Help system.

Employee Tax Forms

Pay/Tax Information > Employee Tax Forms

The Employee Tax Forms page displays the employee's current elections and allows employees to update their Federal and State Tax forms. Forms are an editable PDF file. The employee's current name and address information are pulled directly from the employee's record in Payroll/HR Employees > Employee Maintenance. Changes impacting tax calculations (e.g., allowances, marital status, etc.) are submitted to Payroll (display in IVEE > Payroll > Employees > Employee Tax Forms Portal) to review and approve.

Employee W2

Pay/Tax Information > Employee W2

The Employee W2 page allows employees access to their current W2

Activity *(Required)*

The Employee W2 page allows employees access to their current W2 form if it has been marked to show in portal and payroll has run the command to update records to show in the portal (Infinite Visions > Payroll > Reports > Quarterly/Annual > W2-Processing).

Make Changes to Tax Withholding Forms

SCENARIO: Owen Money and his wife are now the proud parents of a bouncing baby girl they have named Lotta Money. It's now time for Owen to update his tax withholding information to add a new dependent through iVisions.

1. Stay logged into ESS as **Omoney | v**.
2. From the **Pay/Tax Information** menu, select *Employee Tax Forms*. This page displays the employee's current election.
3. Click **Fill out Tax Forms**. The Employee Resource Center displays.
4. Click **Let me Choose**.
5. Click **Federal – W4**.
6. Change Owens's filing status to *Married*.
7. Choose *No*.
8. Click **Next**.
9. Type or select "1" for lines A, B, D.
10. Type "0" for all other fields.
11. In the **Total number allowances you are claiming** field, type "3".
12. In the **Additional amount** field, type "$25.00".
13. Click **Next**.
14. Mark the **Acknowledge** checkbox.
15. Type the last 4 digits ("4644") of Owen's SSN.
16. Click **Submit**.

> If employees are not allowed to change their tax forms through the web portal and must submit a printed PDF form with their changes, be sure to mark the Require hard copy submittal of tax form checkbox in IVEE > Security > Workflow Configuration > Portal Default Settings.

Direct Deposit

Pay/Tax Information > Direct Deposit

The Direct Deposit resource allows employees to review any current direct deposit setup. From this window, submit new direct deposit requests. Until the request is approved/rejected pending changes cannot be edited. Once a DD request is submitted, payroll is notified by email and approves/rejects requests as appropriate.

Tyler suggests reviewing and implementing the iVisions ESS Direct Deposit Setup Best Practices defined in Appendix B.

Employees are notified by email if their request is approved. Email alerts must be active (Infinite Visions > Security > Workflow Configuration > Email Alerts and Jobs).

WORK WITH BENEFITS

Overview

The Benefits Enrollment module is a separately licensed module. Employees can complete their annual benefits enrollment through iVisions web portal. Separate training is provided if the district has purchased the Benefits Enrollment module.

HR Benefits Enrollment

Benefits > HR Benefits Enrollment

This menu is only visible with the Benefits Enrollment module.

HR Enrollment Detail

Benefits > HR Enrollment Detail

This menu is only visible with the Benefits Enrollment module.

HR Employee Beneficiaries

Benefits > HR Employee Beneficiaries

The HR Employee Beneficiaries menu allows an employee to add/change beneficiary information for applicable leave plans. Changes can be made throughout the year.

SECTION SUMMARY

In this section, we learned how employees access and modify information in Employee Self Service.

In the next section, we review working with modules found in My Workflow.

SECTION ASSESSMENT

1. What field in Employee Maintenance is updated once an Employee has successfully registered in the Portal?
   a. Hire Date
   b. Portal User
2. An Entity can allow an employee to edit their Personal Contact Information. This access is granted by marking the Allow employee to edit contact information checkbox found in what Workflow Configuration menu?
   a. Employee Portal Registration
   b. Portal Default Settings
   c. PAR Security
3. Employees can only view their leave information.
   a. True
   b. False
4. Before an Employee filling out a User Defined Form, the form must be Published.
   a. True
   b. False

My Workflow

Section Topics

- iVisions
- Secure Access

Introduction

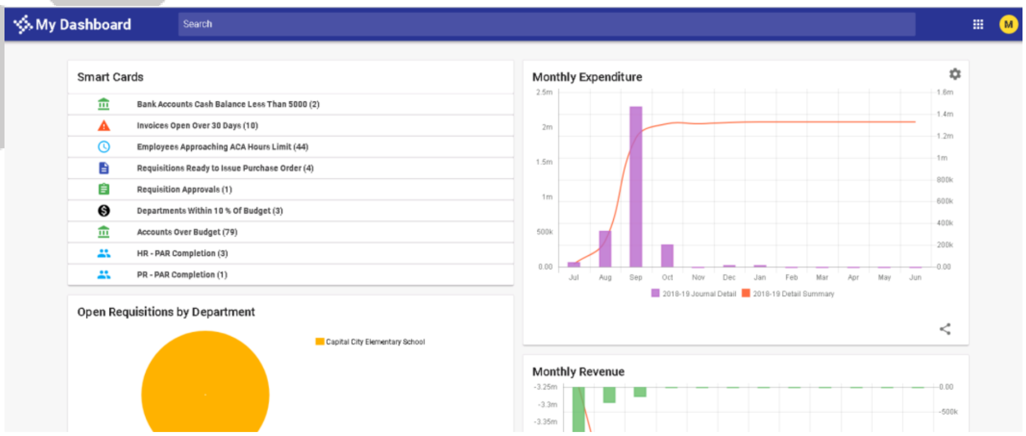
Employees who are part of a predefined approval process access iVisions for items such as invoices, purchase requisitions, purchase orders, journal entries, hours entry, ePARs and user defined forms by clicking the My Workflow menu within ESS.

From the My Dashboard page, a user has access to the Omni Search Bar, Tiles, Smart Cards, Smart Charts, their Profile, and the 9-Box. This section takes a closer look at My Workflow in iVisions.

IVISIONS

Overview

The ESS My Workflow menu item launches the My Dashboard page.



Each iVisions user is assigned a Persona in Infinite Visions > Security > User Security. The assigned persona determines what Tiles, Smart Cards, and Smart Charts display on a user's My Dashboard page.

The assigned User Role determines the applications available within the 9-Box in the Administration module.

For more information about iVisions refer to the iVisions My Dashboard guide.

SECURE ACCESS

Overview

There are 3 key elements to setting up and securing access to My Workflow in the iVisions Web Portal. First, a workflow user is assigned to the special iVisions Workflow user role. Second, decide what workflow items users need to access, and update their user roles in Infinite Visions Administration > User Roles. The user role access setup in Administration carries over to iVisions. All employees needing access to My Workflow in iVisions ESS must also have a user account defined in IVEE > Administration > Users and a User Security record configured in IVEE > Security > User Security.

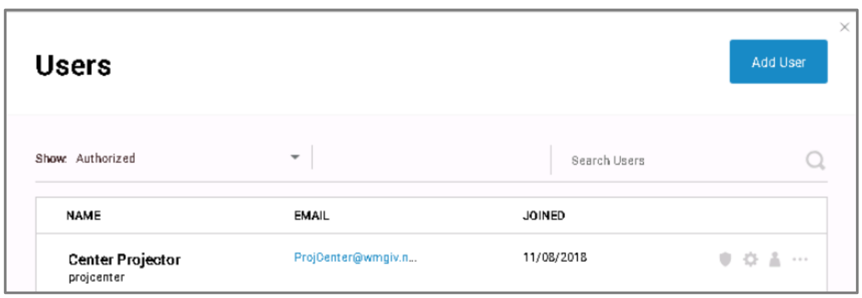
Activity *(Required)*

Manage > Users

Assign Workflow Role in iVisions ESS

SCENARIO: Summer Camp, a teacher at the Infinite Middle School, has just been promoted to principal. In her new role, she is responsible for originating and approving requisitions, ePARs, and budget adjustment. As the iVisions Administrator, assign her the iVisions Workflow user role and update her current IVEE Administration user role to give her access to the menu items she needs.

1. Log into iVisions ESS as **Host | Host**.
2. From the **Manage** menu, select *Users*. The Users window displays.



Users window

3. In the **Search Users** field, type “Summer.” Summer Camp’s user record displays.
4. Click the **User Roles** icon.
5. In the **Begin typing to add a role to this user** field, type “Workflow.”
6. Click **+Add**.
7. Clear the **Send Email** checkbox.

Activity *(Required)*

Administration > Users

Update Administration User Role

SCENARIO: As the Administrator, complete the assigning of security rights for Summer Camp by updating her User Role in the Administration module.

1. Log into IVEE Administration using **Omoney | v**.
2. Expand **Entities**.
3. Expand the Entity Name.
4. Click **Users**.
5. Double-click **Scamp**. The Edit User window displays. Note her current user role of Teacher.
6. From the **Default User Role** dropdown, select *Principal*.
7. Click **OK** to save the change.
8. From the **File** Menu, select *Close* to exit Administration.
9. Navigate to **IVEE > Security > User Security**.
10. Double-click **Scamp**. The Edit User Security window displays.
11. Verify the **Employee** field displays Summer Camp's name.
12. Log into iVisions ESS as **Scamp | v**.
13. Click **My Workflow.**

SECTION SUMMARY

In this section, we reviewed the security setup for My Workflow users including giving access to the Workflow Role in iVisions, adding the user to Administration, and assigning the user a User Role.

In the next section, we review the setup and configuration of pages and modules.

SECTION ASSESSMENT

1. List the 3 key elements to setting up and securing access to My Workflow in the iVisions Web Portal.
   a. ___________________________
   b. ___________________________
   c. ___________________________
2. The My Workflow menu displays on the iVisions ESS menu bar when a user is assigned the Workflow user role in iVisions.
   a. True
   b. False

Appendix A | IVEE/IVISIONS INTEGRATION

INFINITE VISIONS TO IVISIONS

To enable the utilities in the iVisions Web Portal, review the following areas in Infinite Visions and complete the necessary steps as applicable.

PORTAL DEFAULT SETTINGS

IVEE > Security > Workflow Configuration > Portal Default Settings

Use the Portal Defaults window to establish the iVisions server and portal roles for employees. Also, establish default settings for time off requests and tax forms.

EMPLOYEE PORTAL REGISTRATION

IVEE > Security > Workflow Configuration > Employee Portal Registration

Use the Employee Portal Registration window to manage employee portal registration records. The grid can be used to display unlinked portal records (no matching employee name in Infinite Visions).

EMPLOYEE MAINTENANCE

IVEE > Payroll/Human Resources > Employees > Employee Maintenance

To allow employee access to the portal, be sure to populate the Portal User field on the General Information tab of the employee record. If this field is populated, the system automatically creates a link for the user on the Employee Portal Registration window in Security. If an employee is no longer to access the portal, delete the contents of the Portal User field.

PUBLISH PAY INFORMATION (PORTAL)

IVEE > Payroll > Payroll Processing > Publish Pay Information (Portal)

Use this window to select the pay periods for pay information (including direct deposit information) to publish to the web portal.

MASS UPDATE PUBLISH CONTRACTS

IVEE > Human Resources > Contracts > Employee Contracts

Use this window to select the employee contract records to publish to the portal. During the publishing process, there is an option to send an email notification to the employee(s) notifying them their contract is published. In the web portal, employees can review a published contract and accept/reject a contract.

INSURANCE TRACKING CONFIGURATION

IVEE > Human Resources > Insurance Tracking > Configuration

If the district is using the iVisions Benefits Enrollment module, there are several configuration items to review. Each of these areas is addressed in detail during Benefits Enrollment training.

IVISIONS TO INFINITE VISIONS

To complete the process of information submitted through the iVisions Web Portal, review the following areas in Infinite Visions and complete the process as needed.

EMPLOYEE TAX FORMS

IVEE > Payroll/Human Resources > Employees > Employee Tax Forms (Portal)

This window displays tax forms submitted by employees through the web portal. Select Show Attachments from the Actions menu to open the form.

EMPLOYEE PROFILE CHANGES

IVEE > Payroll/Human Resources > Employees > Employee Profile Changes (Portal)

This window displays profile changes submitted by employees through the web portal. From this window, changes are reviewed, posted, or denied.

EMPLOYEE LEAVE PLAN REQUESTS

IVEE > Payroll/Human Resources > Attendance > Employee Leave Plan Requests (Portal)

This window displays time off requests submitted by employees through the web portal. From this window, requests are reviewed, posted, or denied.

CONTRACT STATUS

IVEE > Human Resources > Contracts > Contract Status (Portal)

This window displays contracts published to the web portal and their status. From this window, email employees and print Contract and Acceptance Report as needed.

MY WORKFLOW

BUDGET JOURNAL ENTRY

IVEE > General Ledger > Journal Adjustments > Budget Journal Entry

This window displays journal entries routed through the approval queue ready for review. From this window, approve and post entries.

BUDGET ADJUSTMENT ENTRY

IVEE > General Ledger > Budgeting > Budget Utilities > Budget Adjustment Entry

This window displays budget adjustments routed through the approval queue ready for review. From this window, approve and post entries.

The only My Workflow utility requiring additional setup in Infinite Visions is ePARS. The setup is covered in the ePARS training class. Also, set up approval queues for purchasing requisitions and warehouse requisitions. Approvers and their assigned accounts are defined in Security > Workflow Configuration.

Appendix B | DIRECT DEPOSIT BEST PRACTICES

DIRECT DEPOSIT BEST PRACTICES

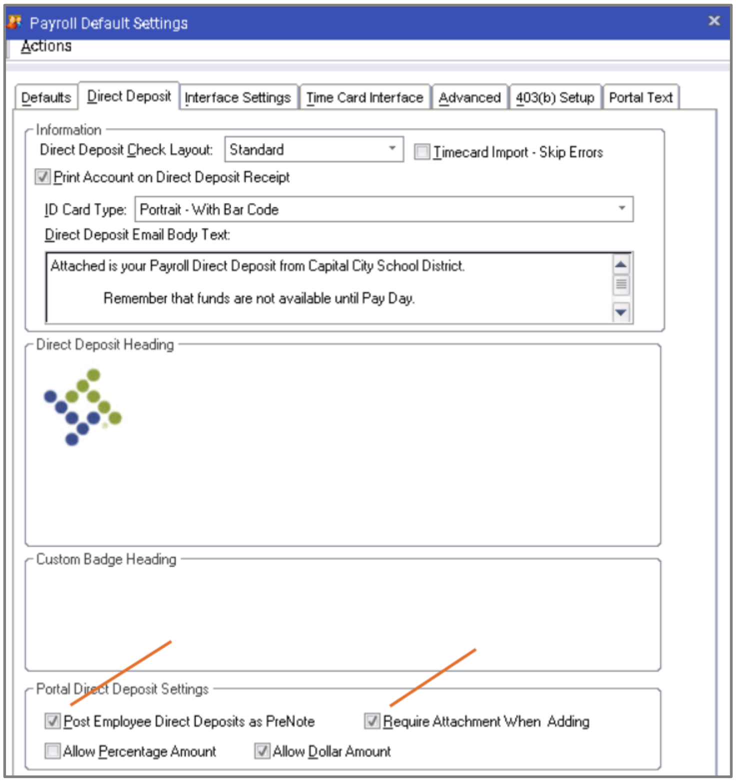
This Appendix describes the Best Practices suggested by Tyler for processing Direct Deposit requests in the iVisions ESS portal.

Tyler suggests requiring Prenotes for all Employee Direct Deposit additions and changes, and a voided check or bank letter with the bank's routing number and bank account number be attached to the Direct Deposit submission.

PAYROLL DEFAULT SETTINGS

Payroll > Configuration > Payroll Default Settings > Direct Deposit tab

1. Mark the following checkboxes in the **Portal Direct Deposit Settings**:
    a. Post Employee Direct Deposits as PreNote
    b. Require Attachment When Adding



Portal Direct Deposit Settings

IVISIONS ESS DIRECT DEPOSIT PAGE

Tyler suggests adding a banner on the Direct Deposit ESS page notifying employees they will receive an email verification notice regarding the direct deposit addition or change.

Tyler suggests enforcing a policy where the employee follows up with the Payroll Department to verbally confirm their Direct Deposit addition or change.

Note: Do not post the District's Contact Name and Phone Number on the Direct Deposit page within iVisions ESS. However, include the information in the confirmation email.

Example of iVisions ESS Direct Deposit Page w/o Contact Information

EMPLOYEE DIRECT DEPOSIT REVIEW

1. Navigate to **Payroll > Employees > Employee Direct Deposit (PORTAL).**
2. Mark the **Select** checkbox for the appropriate Employee(s).
3. From the **Actions** menu, select the *View Attachment* command. Verify the attachment is either a **voided check** or **bank letter**.

Note: Scammers are good at creating checks, and bank letters and they look authentic!

Tyler suggests before posting the attachment to the Employee's Documents, send an email to the employee confirming the Direct Deposit addition or change is valid, and a follow-up phone call to the Payroll Supervisor is required.

Subject: Confirmation of your Direct Deposit Change Request – RESPONSE REQUIRED

BODY:

Attention EMPLOYEE NAME:

We have received your request to change your Direct Deposit information through the employee portal. We have implemented new security measures and are asking for a verbal confirmation before your request is processed.

Please use a CUSD phone line to contact the Payroll Coordinator listed below and confirm your change request. For your protection, your request will not be processed until we receive your verbal confirmation.
Also, If you did not make this request please respond immediately by contacting:

Payroll Clerk
123-456-7890

Example of Direct Deposit Authorization Email

If the employee does not contact the payroll supervisor, email or call the employee again or until the employee provides confirmation or denial of the direct deposit request. Do not post the record until confirmation or denial is received from the employee.

EMPLOYEE DIRECT DEPOSIT CONFIRMATION/DENIAL

If the employee confirms entering the Direct Deposit addition or change use the following process to accept the Direct Deposit:

1. Navigate to **Payroll > Employees > Employee Direct Deposit (PORTAL)**.
2. Mark the **Select** checkbox for the Employee's record.
3. From the Actions menu, select *Check Routing Numbers.* The system verifies the routing number is in Infinite Visions. If the routing number is not in Infinite Visions, click **Yes** to the message to add the routing number. Click **OK** to the verified message.
4. With the **Select** checkbox marked on the Employee's record, from the Actions menu select **Save Attachment to Employee Docs**.
5. Then, from the **Actions** menu, select **Approve Selected Direct Deposits**.

If the employee denies entering the Direct Deposit addition or change use the following process to deny the Direct Deposit:

1. Navigate to **Payroll > Employees > Employee Direct Deposit (PORTAL).**
2. Mark the **Select** checkbox for the Employee's record.
3. From the Actions menu, select *Deny Selected Direct Deposits.*