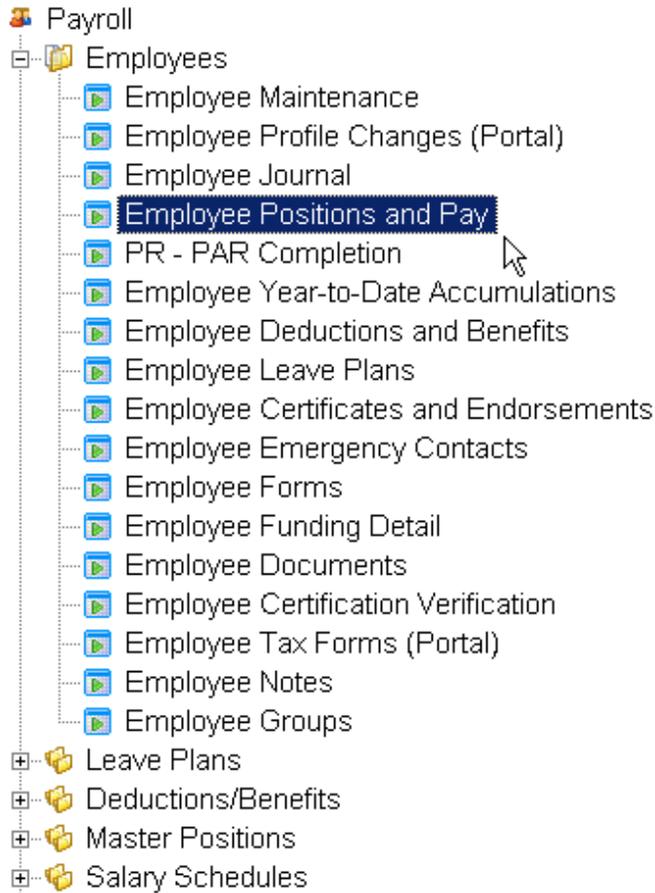




InfiniteVisions

Overview of New Employee Positions and Pay Screen

Before you begin setting up your new Payroll User Roles, let's take a look at the new Employee Positions and Pay screen. You'll then have a better understanding of the impact field-level security will have on your school district.



The new Employee Positions and Pay screen, replaces the following menu items:

- Position Inventory
- Employee Positions
- Employee Supplemental Pay
- Contract Assignment



InfiniteVisions

This creates one central location for maintaining positions and supplemental pays. Several Action menu items are also replaced in the process. Information is now organized into different tabs.

Information Tab: This tab is comprised mostly of information that used to be maintained in Position Inventory.

The screenshot shows the 'Edit Employee Pay' dialog box with the following fields and callouts:

- Employee Selection:** Employee ID: AS47897, Name: Asday, Claire, SSN: XXXXX-7897, Description: Teacher, Control Code: I-200-10097, ETE: 1.0000.
- Information Tab:** Pay Type: Position, DAC: Infinite Middle School, Position Type: Teacher, Position: [blank], State: [blank], Cert: [blank], Budget: \$0.00, Leave Factor: 1.0000, Leave Plan: [blank], Projection: \$45,500.00, Amount: \$31.60, Salary Schedule Projection: Certified FY0708 Row: Step 5] Column: [MA], Comments: Some comments about Claire entered here.
- Callouts:**
 - 'Assign Position action replaced by selecting Position here' points to the Position field.
 - 'Assign and Vacate Employee actions replaced by selecting or clearing Employee here' points to the Name field.
 - 'Assign Contract screen replaced by selecting Contract here' points to the Contract dropdown menu.

At the bottom, there are navigation buttons (Back, Forward), a checkbox for 'Close this dialog after update?', and OK, Cancel, and Help buttons.



InfiniteVisions

Pay Tab: The Pay tab contains many items that when altered, may impact the pay calculation for the position or supplemental. Notice that Funding is included here and is now an “editable” grid.

Edit Employee Pay

Employee Selection

Employee ID: AS47897 Name: Asday, Claire SSN: XXX-XX-7897
Description: Teacher Control Code: I-200-10097 ETE: 1.0000

Information Pay Distribution State Data User Defined Fields Change Log

Pay Basis: Hourly Salary
Pay Method: Time Card Work Agreement

Position Amount: Amount: \$49,500.00 Hrs/Day: 8.0000
Daily Rate: \$275.04 Hourly Rate: \$34.38

Subtract from Position Distribution: Amount: \$0.00
Excluded Retro: \$0.00

Salary Schedule: Certified FY0708 Row: [Step 6] Column: [MA+15]

Work Calendar: 180 Day Teacher Lump Pay Cycle: Biweekly Days: 180

Position Dates: Start: 08/14/2007 End: 05/29/2008
Work Dates: Start: 08/14/2007 End: []
Periods: Start: 4 End: 24
Pay Days: Start: 9 End: 8
Pay Dates: Start: 08/24/2007 End: 05/30/2008

Active	Account	Percentage	Remaining	Description	Fiscal	Deduction	Leave
*		100.00	\$43,560.00		\$5,940.00	No	Yes

Calculate Amount (points to Percentage column)
Calculate Percentage (points to Percentage column)
Distribute Amounts Evenly (points to Remaining column)

Correct Posted Funding? [Currency] [Percentage] [Globe] Total: 0.0000% \$0.00 % Variance: 0.00%

Mode: Edit - Record 1 of 1 [Close this dialog after update?] [OK] [Cancel] [Help]



InfiniteVisions

Distribution Tab: This tab shows calculated distribution as well as what has been “generated” in the payroll journal. Distribution is totaled at the bottom of each grid.

The screenshot shows the 'Edit Employee Pay' dialog box with the 'Distribution' tab selected. The 'Employee Selection' section includes fields for Employee ID (AS47897), Name (Asday, Claire), Description (Teacher), and Control Code (1-200). The 'Calculated Distribution' table shows data for periods 4.00 through 9.00, with columns for Amount, Status, Hours, System, Adjustment, Void, and Retro Pay. A callout points to this table: 'Displays the distribution that will result when Position/Pay records are generated'. Below it is a 'Pay Journal' table with the same columns. A callout points to it: 'Displays the actual generated distribution amounts'. A checkbox labeled 'Generate pay journal' is located between the two tables. A callout points to it: 'Allows user to regenerate pay without making changes to position/pay amounts'. Another callout points to the 'View and Maintain Journal Adjustments' link: 'View and Maintain Journal Adjustments'. The dialog also includes a 'Total' row and a 'Mode: Edit - Record 1 of 1' indicator.

State Data: This tab will contain any state-specific information for positions and supplemental pays.

The screenshot shows the 'Edit Employee Pay' dialog box with the 'State Data' tab selected. The 'Employee Selection' section includes fields for Employee ID (AS47897), Name (Asday, Claire), Description (Teacher), Control Code (1-200-10097), SSN (XXXXXX-7897), and ETE (1.000). The 'SDER Data' section includes a 'Grade Level' dropdown menu set to 'Elementary'. The dialog also includes a 'Total' row and a 'Mode: Edit - Record 1 of 1' indicator.



InfiniteVisions

User Defined Fields: This tab contains any user-defined fields that have been created for positions and supplemental pays.

Edit Employee Pay

Employee Selection

Employee ID: AS47897 Name: Asday, Claire SSN: XXXXX-7897

Description: Teacher Control Code: I-200-10097 ETE: 1.0000

Information Pay Distribution State Data **User Defined Fields** Change Log

Information

Anticipated End Date: / /

End Date Reason: None

Fund: 001

Bargaining Grp: Certified

Change Log: As information about the position or supplemental is modified, the system now tracks these changes on the Change Log tab.

Edit Employee Pay

Employee Selection

Employee ID: AS47897 Name: Asday, Claire SSN: XXXXX-7897

Description: Teacher Control Code: I-200-10097 ETE: 1.0000

Information Pay Distribution State Data User Defined Fields **Change Log**

Change Log						
Change Date	User ID	Reason	Field Name	Old Value	New Value	
10/18/2007 15:55	LCredit	Fixed position end date changed in error by Rick	End Date	05/23/2008	05/29/2008	
10/18/2007 15:55	LCredit	Fixed position end date changed in error by Rick	Next Year Amount	44741.67	45500	
10/18/2007 15:55	LCredit	Fixed position end date changed in error by Rick	Pay Change(Positi	48675	49500	
10/18/2007 15:55	LCredit	Fixed position end date changed in error by Rick	Position Days	177	180	
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructor	Assignment Status	Ready to Pay	Assigned by HR	
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructor	End Date	05/29/2008	05/23/2008	
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructor	Pay Change(Positi	49500	48675	
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructor	Position Days	180	177	
10/18/2007 15:43	RHilton	Corrected bad data entry	Budget	49500	49850	
10/18/2007 15:43	RHilton	Corrected bad data entry	State Code	207	215	
10/18/2007 15:43	RHilton	Corrected bad data entry	Supervisor	Knott, Shirley	False	



InfiniteVisions

Okay, now you've got a better understanding of the fields available on the new Employee Positions and Pay screen. Imagine now that every field on these tabs can be secured for each user by creating a Payroll User Role.

There are three levels of access that can be given to each field: Full Access, Read Only, or No Access.

Let's take a look at the information tab again, this time with some field-level security in place.

The screenshot shows the 'Edit Employee Positions and Pay' dialog box with the 'Information' tab selected. The dialog contains various fields for employee information and pay details. Three callout boxes highlight specific security settings:

- Fields set to "No Access":** Points to the 'Department' and 'Supervisor' fields, which are visible but their drop-down menus are hidden.
- Fields set to "Full Access":** Points to the 'Position Type' field, which is a standard active drop-down menu.
- Fields set to "Read Only":** Points to the 'Comments' field, which is a text area that is grayed out.

Other visible fields include Employee ID (AS47897), Name (Asday, Claire), SSN (XXX-XX-7897), Description (Teacher), Control Code (I-200-10097), ETE (1.0000), Pay Type (Position), DAC, Position Category, State Code (000), Cert / Class (Certified Non-Admin), Budget (\$49,500.00), Projection (\$61,875.00), Salary Schedule, and Projection. The bottom of the dialog shows 'Mode: Edit - Record 1 of 1' and buttons for OK, Cancel, and Help.

As you can see, for fields defined as "no access" the field name is displayed but the drop down or text box is hidden. Fields set to "read only" are grayed out, and "full access" fields function as normal.



InfiniteVisions

This same concept has also been applied to the Employee Maintenance screen for both the General Information tab, and the Dates/Demographics tab.

Employee Selection

Employee ID: AS47897 Prefix: First: Claire Middle: Last: Asday Generation:

General Information | Dates / Demographics | Change Log

General Information

Student System ID: Social Security Number: XXXX-7897

State ID:

Mailing Address: 1249 N South St

Carefree IV 12341

Street Address: 1249 N South St

Carefree IV 12341

Primary Job Title:

Comments:

Photo of a woman

Status: Employee Category: Gender: Marital Status:

Email Address: casday@ccsd.k12.iv.us

Check Location:

Home Phone: (355)-555-6789 Unlisted

Work Phone: (355)-636-2222 Ext: 555

Cell Phone: (355)-888-8777

Mode: Edit - Record 1 of 1

Close this dialog after update?

Process employee setup wizard?

OK Cancel Help

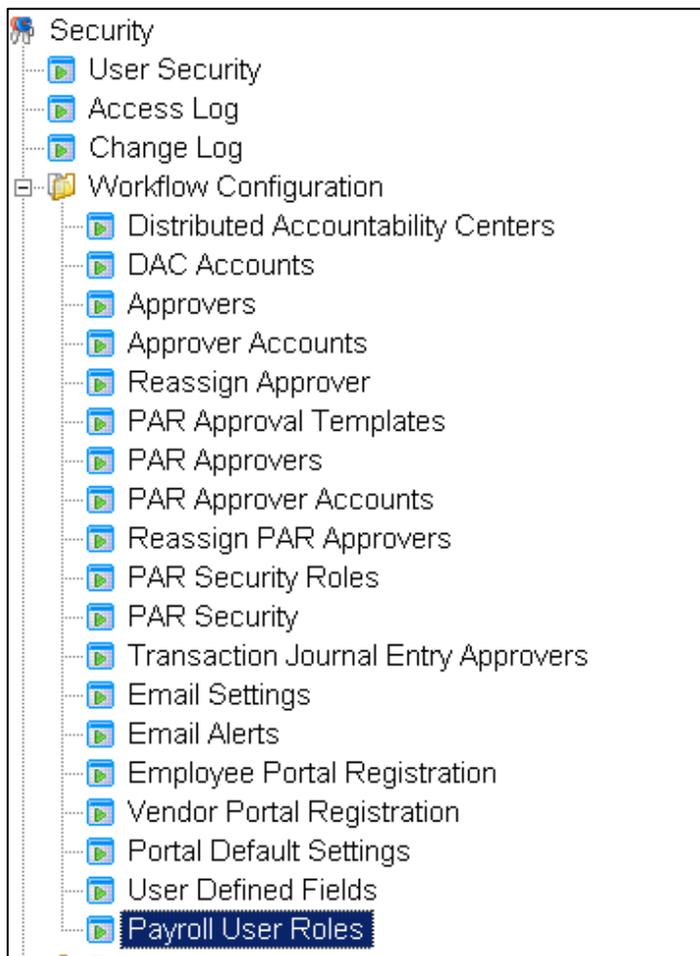


InfiniteVisions

Setting up your Payroll User Roles

Now that you've got the big picture of what you have to look forward to with the 2.2 release, let's create those Payroll User Roles. The person who will be creating the roles will need access to the Security Module.

- 1.) Open Infinite Visions Enterprise Edition (version 2.1.12 or later) and go to Security | Workflow Configuration | Payroll User Roles.





- 2.) Click the Add records button and the following screen will be displayed:

- 3.) Enter a name and description for your role (for example, Payroll Supervisor, HR clerk, or PR – Limited access). Use whatever makes sense to you.
- 4.) Next, set the access you want for each field on the Employee Pay Security tab. Specific Action menu items can be secured by checking or unchecking the boxes at the bottom of the screen.



- 5.) When finished, click the Emp Maint. Security tab. Repeat this process for the fields in Employee Maintenance.

Edit User Role

User Role Information

Name: EE Contact Info Only
Description: EE Contact Info Only

Employee Pay Security | **Emp. Maint. Security** | Emp. Maint. Actions

Employee Name:	View Only	Employee ID:	Full Access	User Defined Field:	No Access
Social Security:	View Only	Issue Pay Check:	No Access	Archive:	No Access
State ID:	View Only	Substitute:	No Access	Mailing Address:	Full Access
Street Address:	Full Access	Status:	No Access	Category:	No Access
Gender:	No Access	Marital Status:	No Access	Email Address:	Full Access
Check Location:	No Access	Job Title:	No Access	Template:	No Access
Emp. Comments:	Full Access	Phone Numbers:	Full Access	Portal User:	No Access
Birth Date:	No Access	Hire Date:	No Access	Probation Ends:	No Access
Seniority Date:	No Access	Tenure Date:	No Access	Leave Accrual Date:	No Access
Benefits Eligibility:	No Access	Insurance Class:	No Access	Termination:	No Access
Rehire Date:	No Access	Ethnicity:	No Access	EEOC:	No Access
Medicaid Class:	No Access	Experience:	No Access	Leave Bank:	No Access
User Defined:	View Only	Picture:	View Only	Change Log:	No Access

Close this dialog after update?

Mode: Edit - Record 1 of 1

OK Cancel Help



- 6.) Now click the Emp Maint. Actions tab. Set the level of access you want to the Action menu items available on the Employee Maintenance screen.

The screenshot shows the 'Edit User Role' dialog box. The 'User Role Information' section contains 'Name: EE Contact Info Only' and 'Description: EE Contact Info Only'. The 'Employee Pay Security' tab is selected, and the 'Emp. Maint. Actions' sub-tab is circled in red. Below this, there is a grid of access levels for various modules:

Certificates:	No Access	Employee Criteria:	No Access	YTD:	No Access
Contracts:	No Access	Evaluation:	No Access	Position:	No Access
Deductions:	No Access	Emergency:	Full Access	PR Journal:	No Access
Dependents:	No Access	Language:	No Access	Leave:	No Access
Documents:	No Access	Education:	No Access	Misc. Tracking:	No Access

At the bottom, there are two checkboxes: Allow employee forms and Allow user to print labels. The dialog also has a 'Close this dialog after update?' checkbox and buttons for 'OK', 'Cancel', and 'Help'.

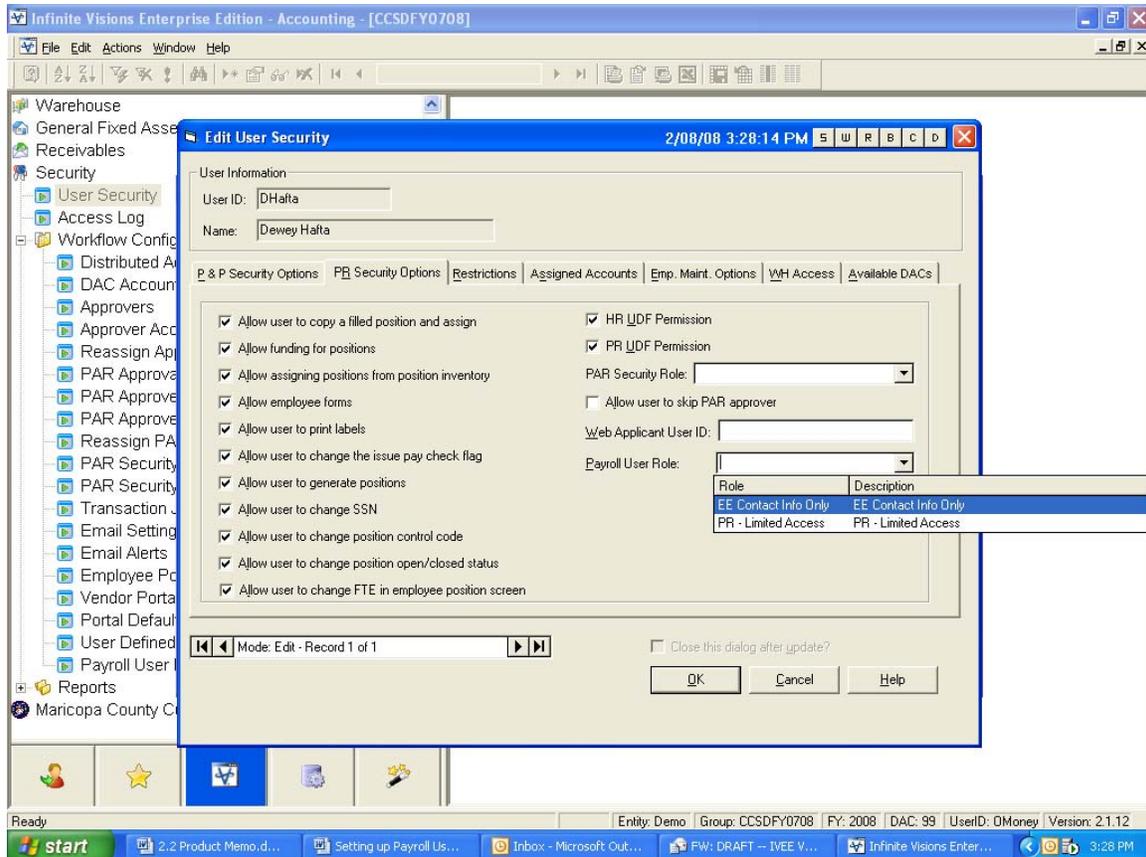
- 7.) When finished, click OK to save your changes. Now just repeat steps 2 – 7 for the other Payroll User Roles you wish to create.



Assigning Payroll User Roles to Users

We're almost finished. The last thing to do is assign the newly created roles to your Payroll/HR and Business Office staff.

- 1.) Go to: Security | User Security | Edit User Record



- 2.) On the PR Security Options tab, select the appropriate role from the drop down list. Repeat this process for all applicable users.

Congratulations! You've successfully created and assigned your new Payroll User Roles. When these new features become active with the release of version 2.2, you're security set up will already be complete and ready to go!