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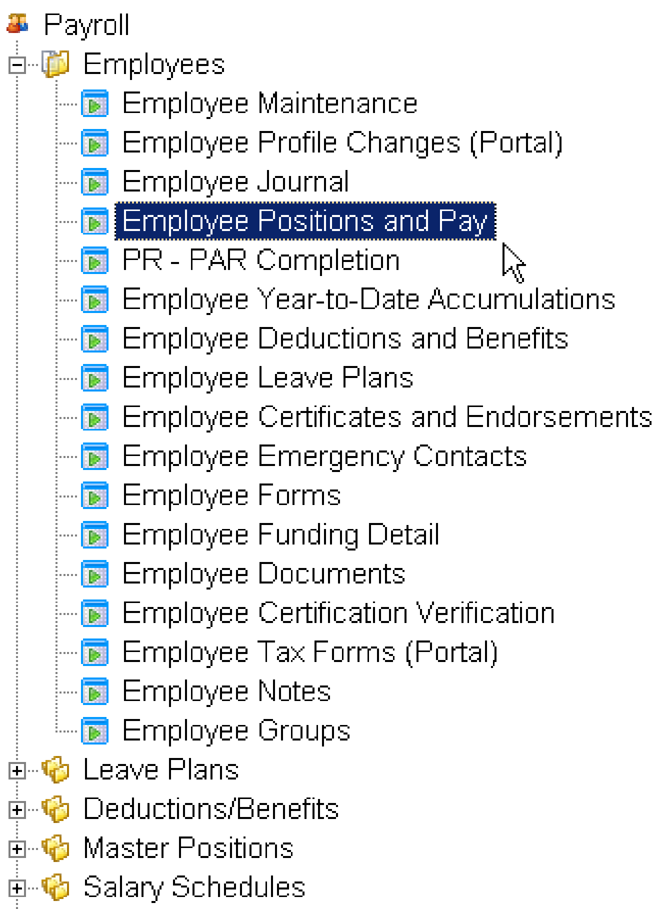
Overview of New Employee Positions and Pay Screen

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

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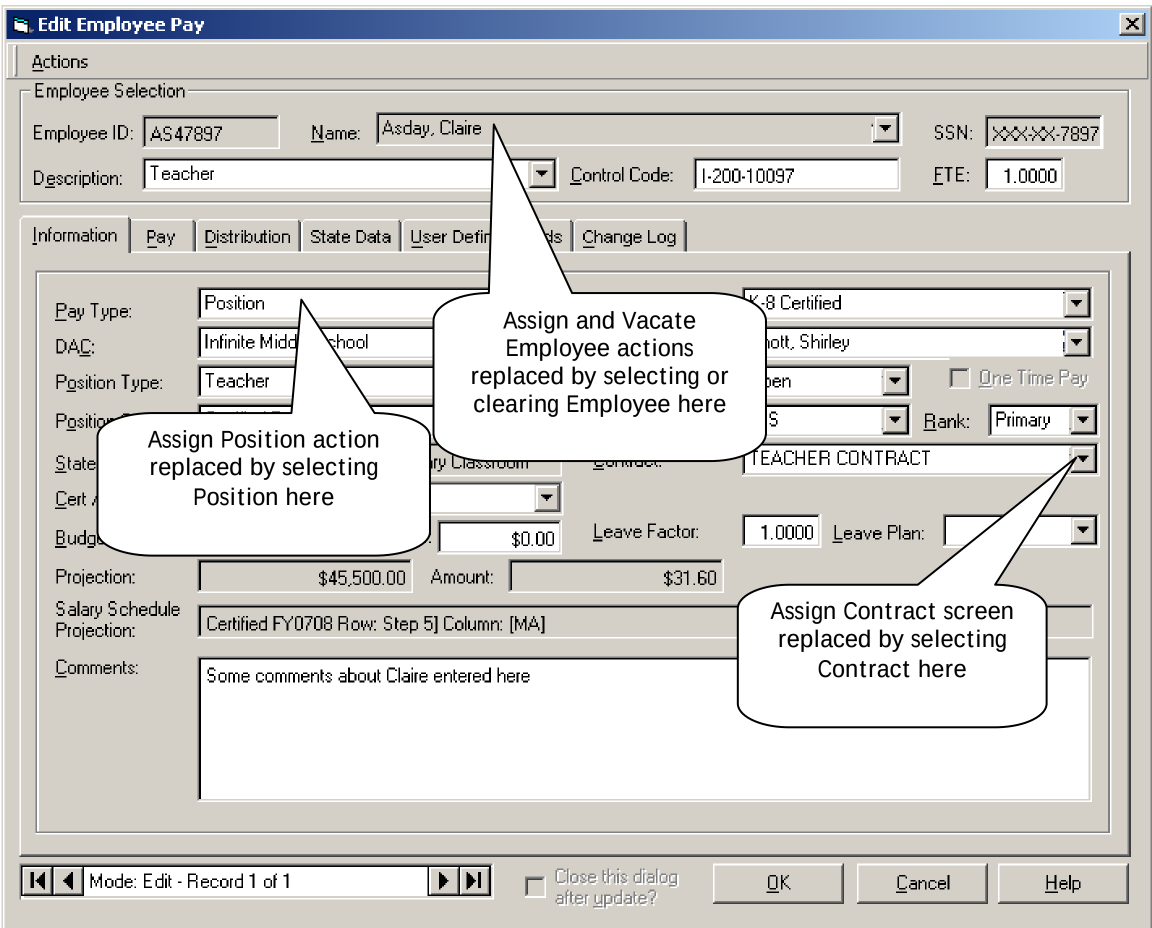
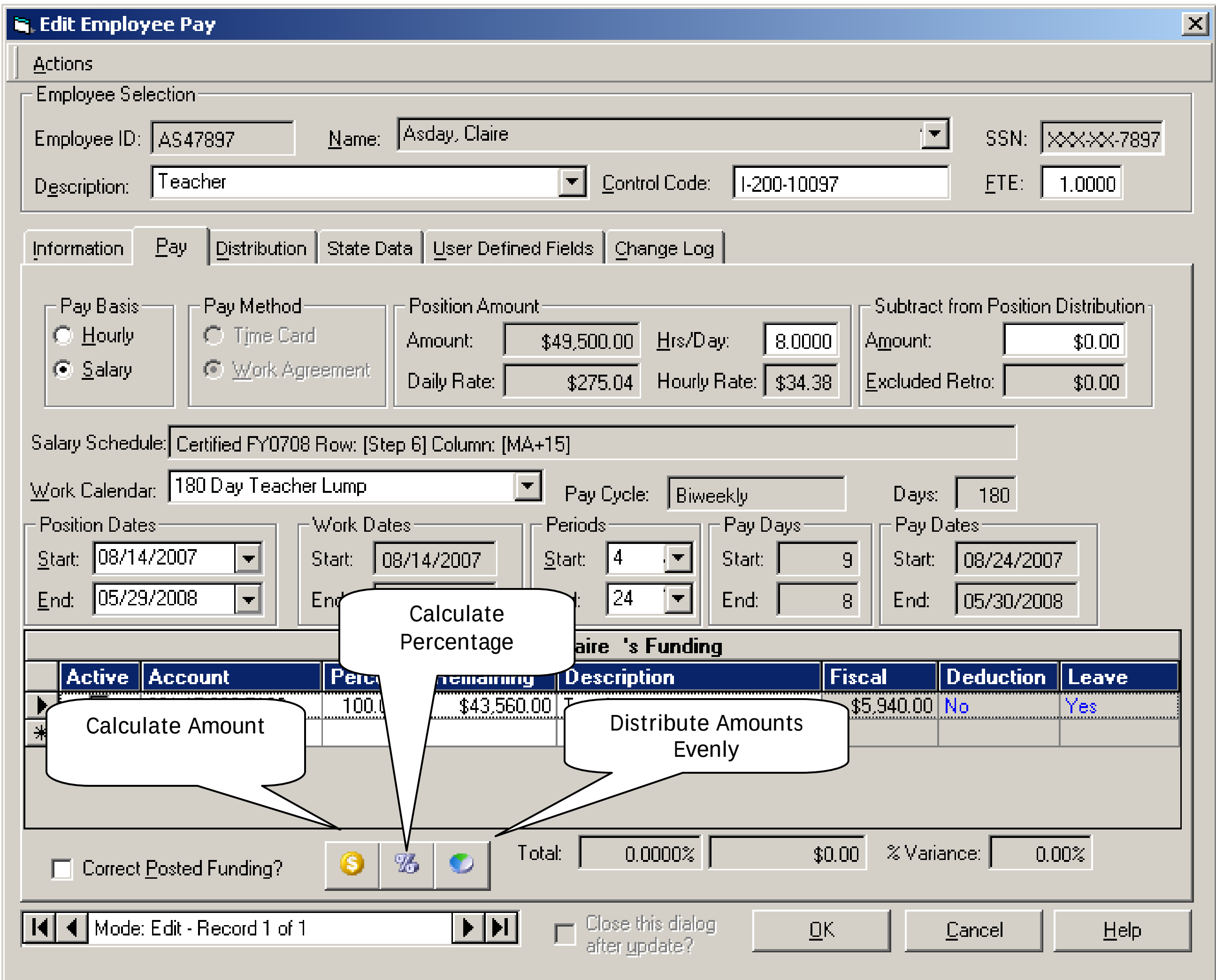
This creates one central location for maintaining positions and supplemental pays. Several Action menu items are also replaced in the process. Information is now organized into different tabs.

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



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.



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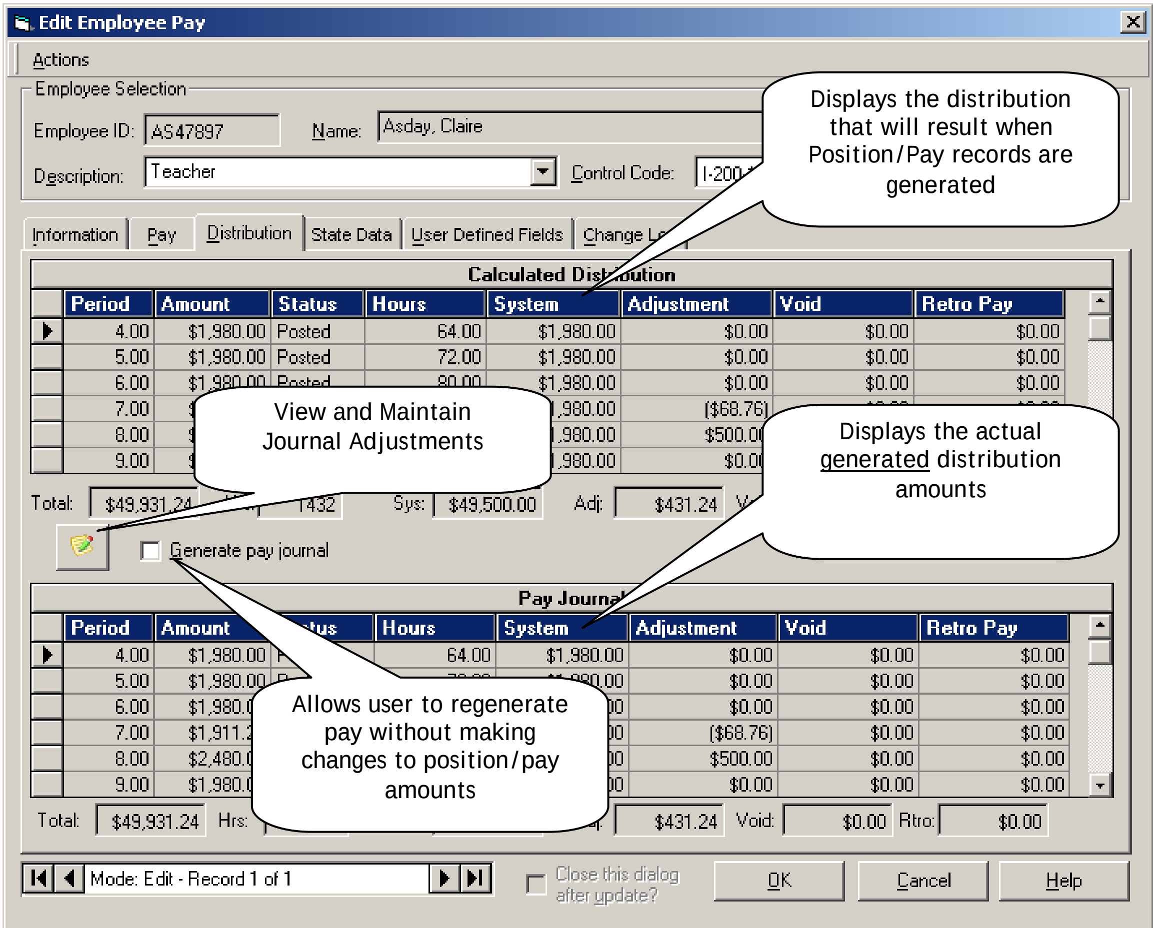
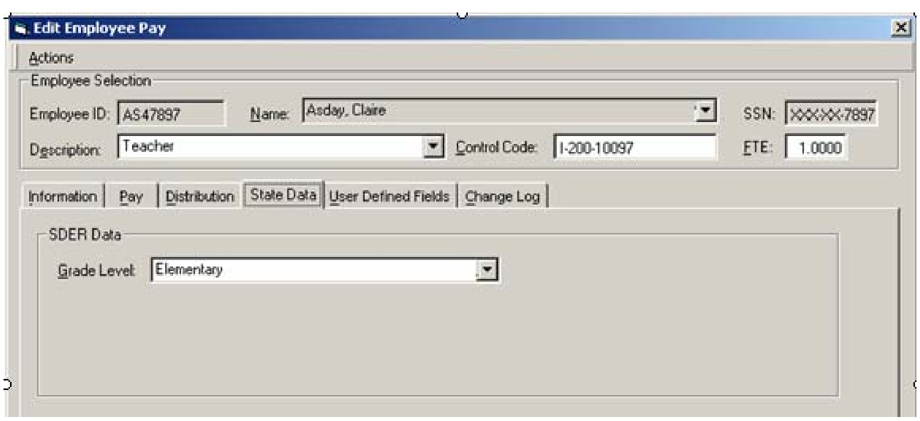
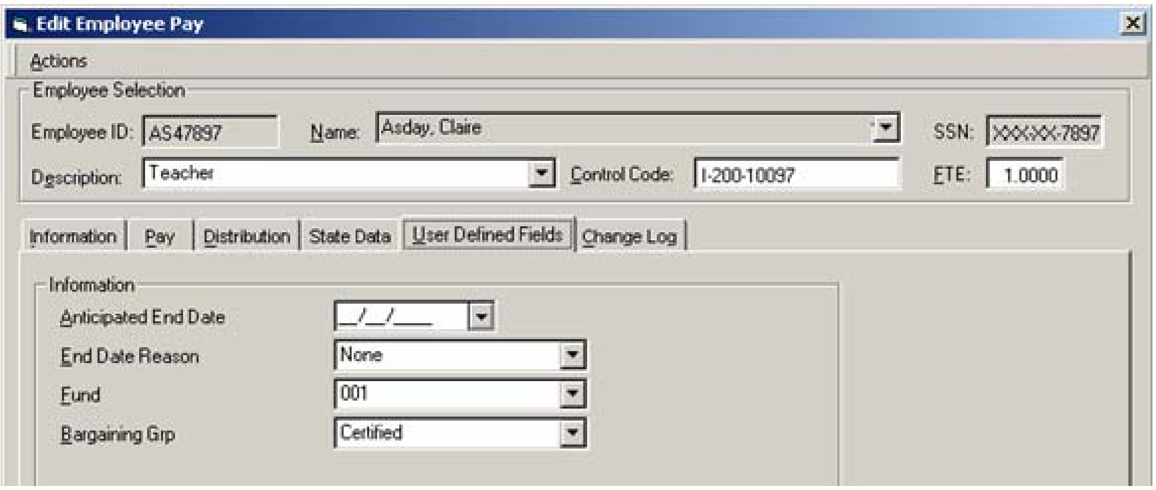
Distribution Tab: This tab shows calculated distribution as well as what has been "generated" in the payroll journal. Distribution is totaled at the bottom of each grid.



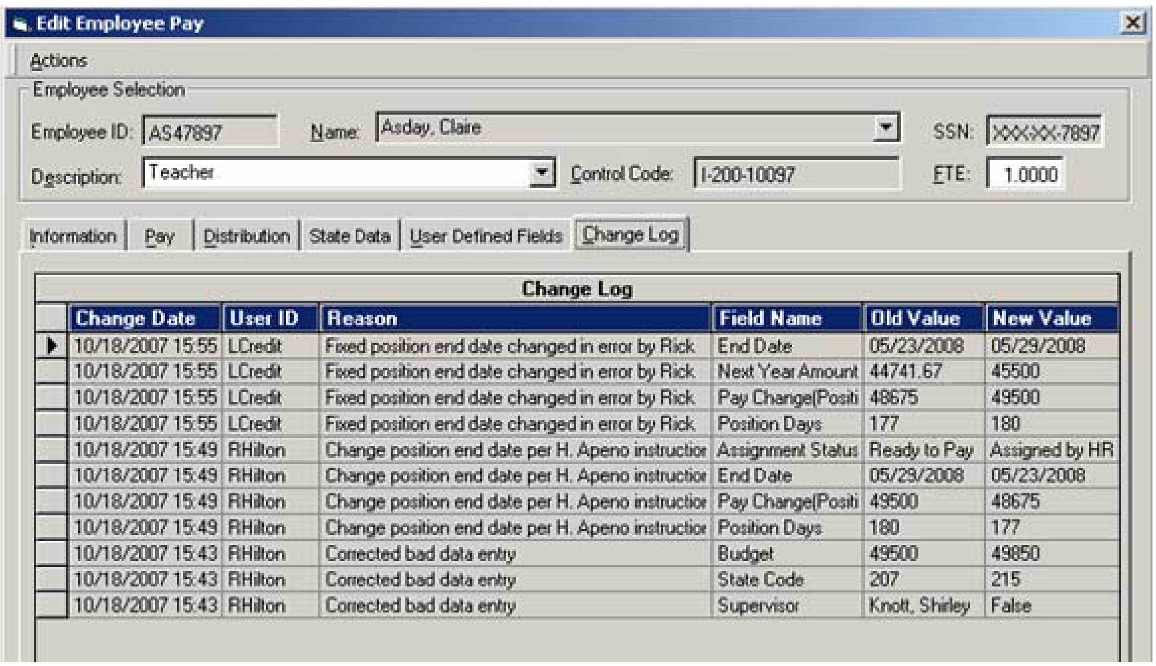
State Data: This tab will contain any state-specific information for positions and supplemental pays.



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



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



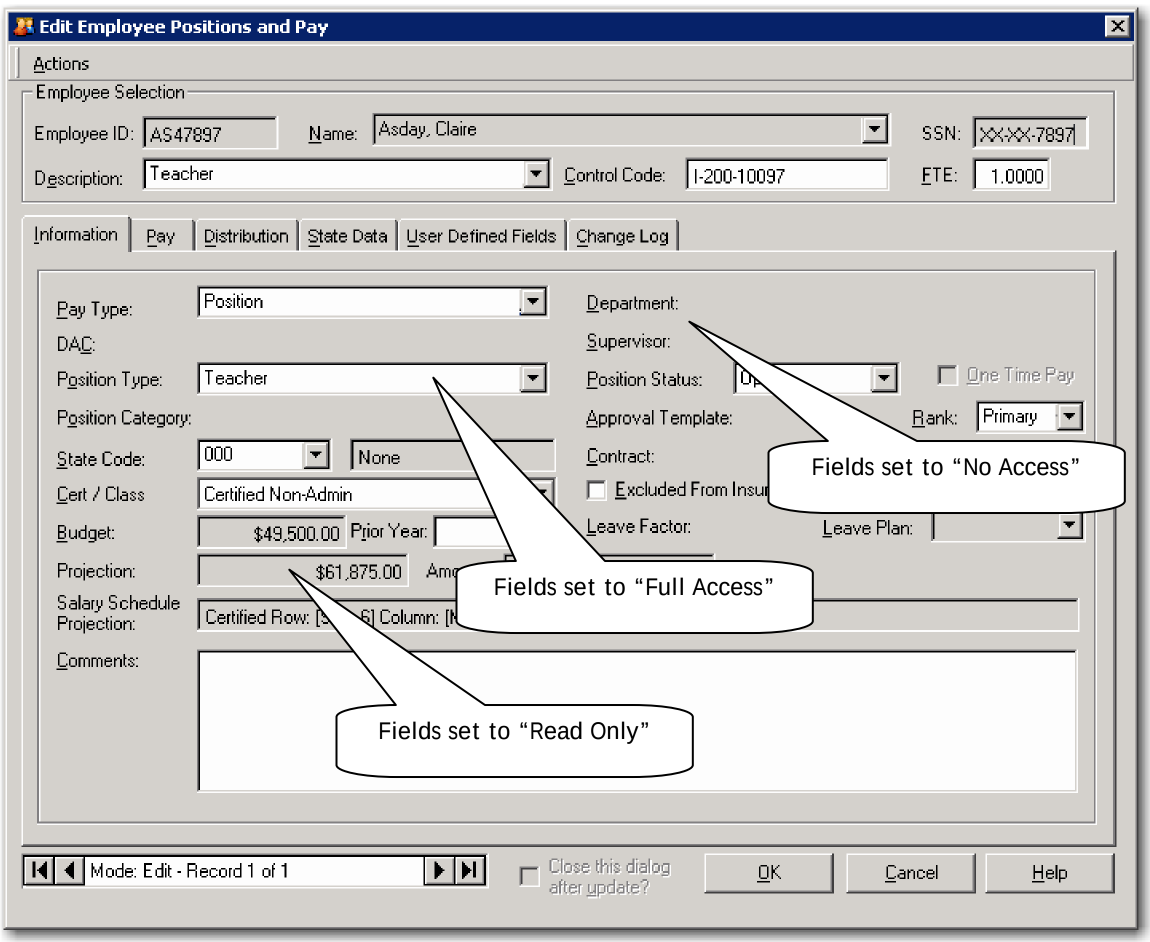
Change Log

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 instructior	Assignment Status	Ready to Pay	Assigned by HR
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructior	End Date	05/29/2008	05/23/2008
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructior	Pay Change(Positi	49500	48675
10/18/2007 15:49	RHilton	Change position end date per H. Apeno instructior	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

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.

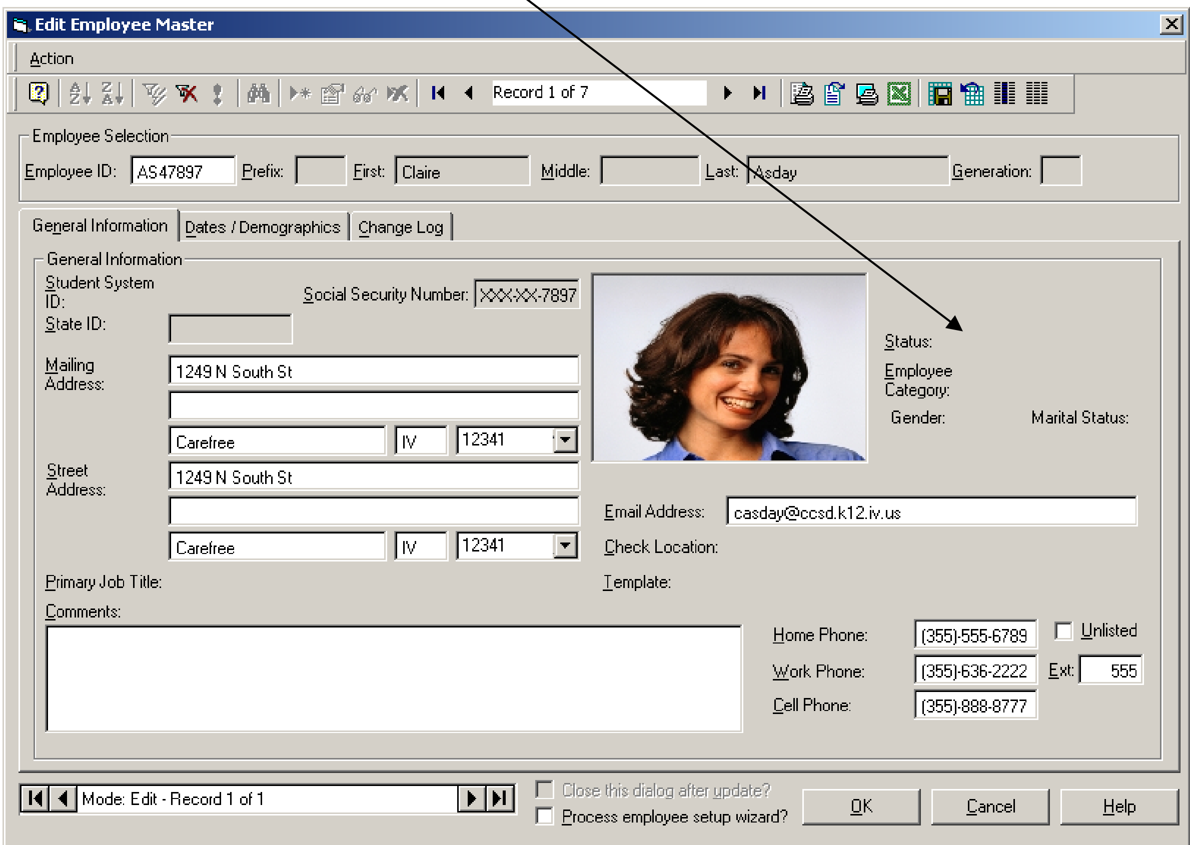
There are three levels of access that can be given to each field: Full Access, Read Only, or No Access.

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



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.

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



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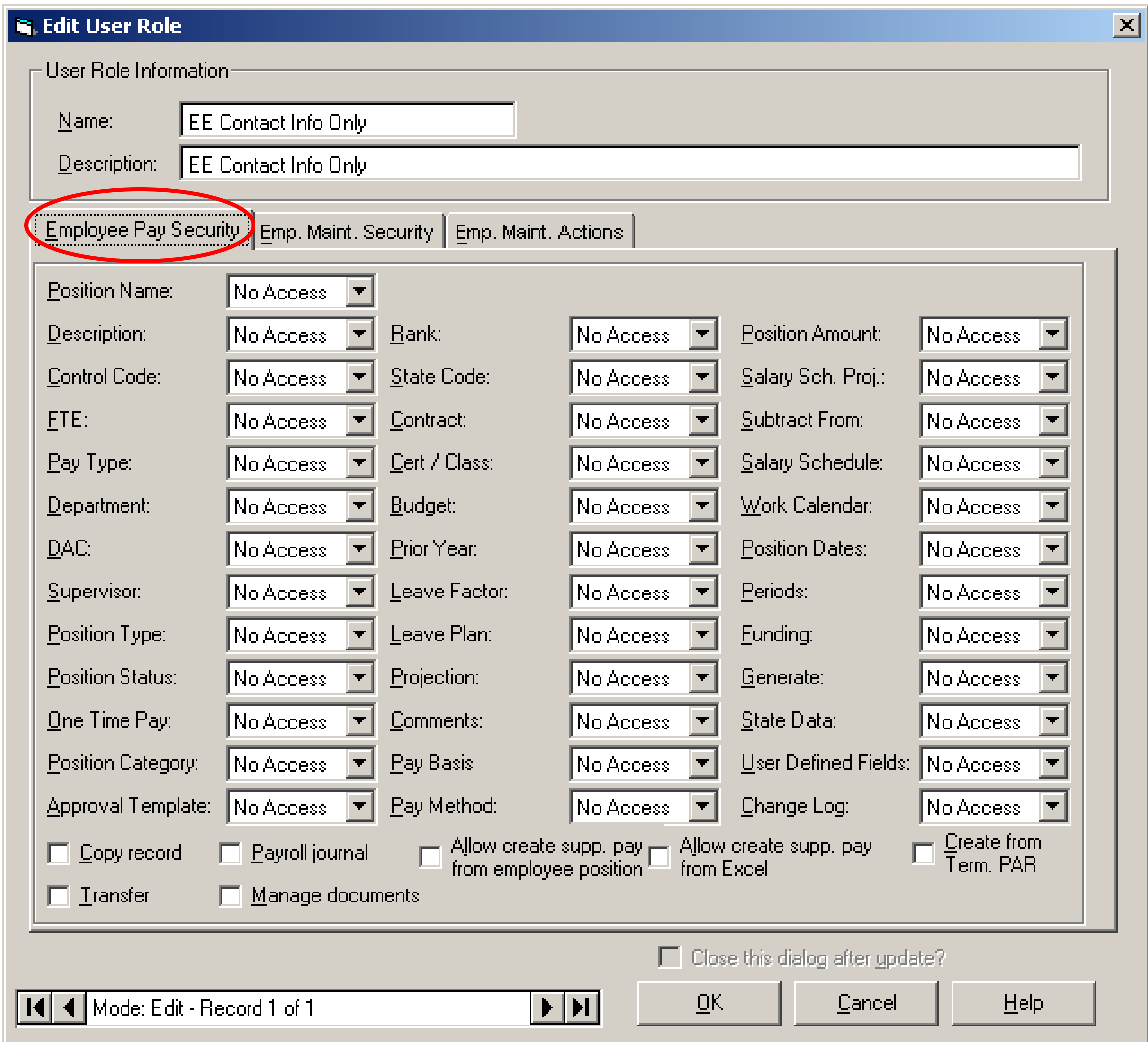
Setting up your Payroll User Roles

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.

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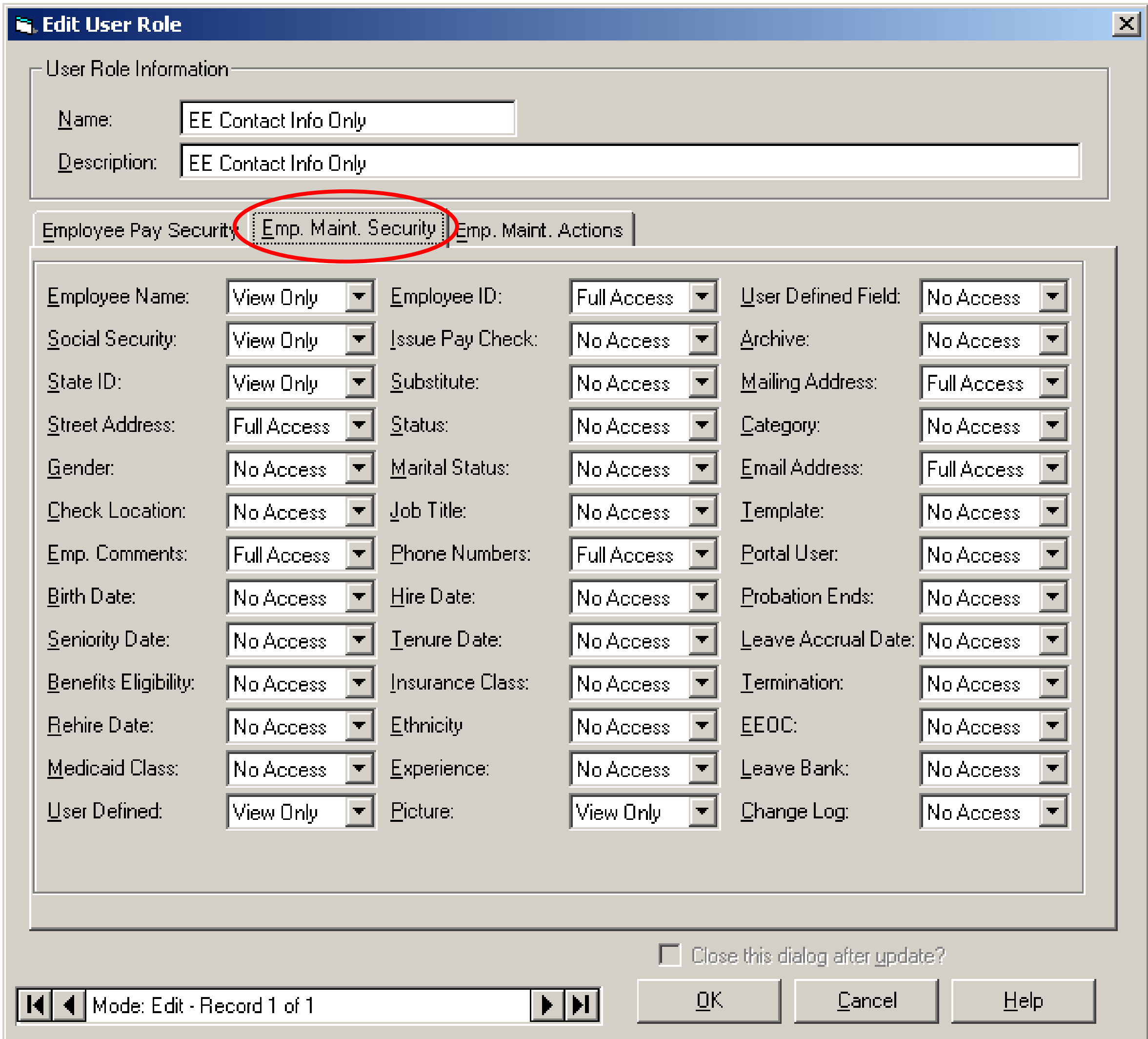
5.) When finished, click the Emp Maint. Security tab. Repeat this process for the fields in Employee Maintenance.



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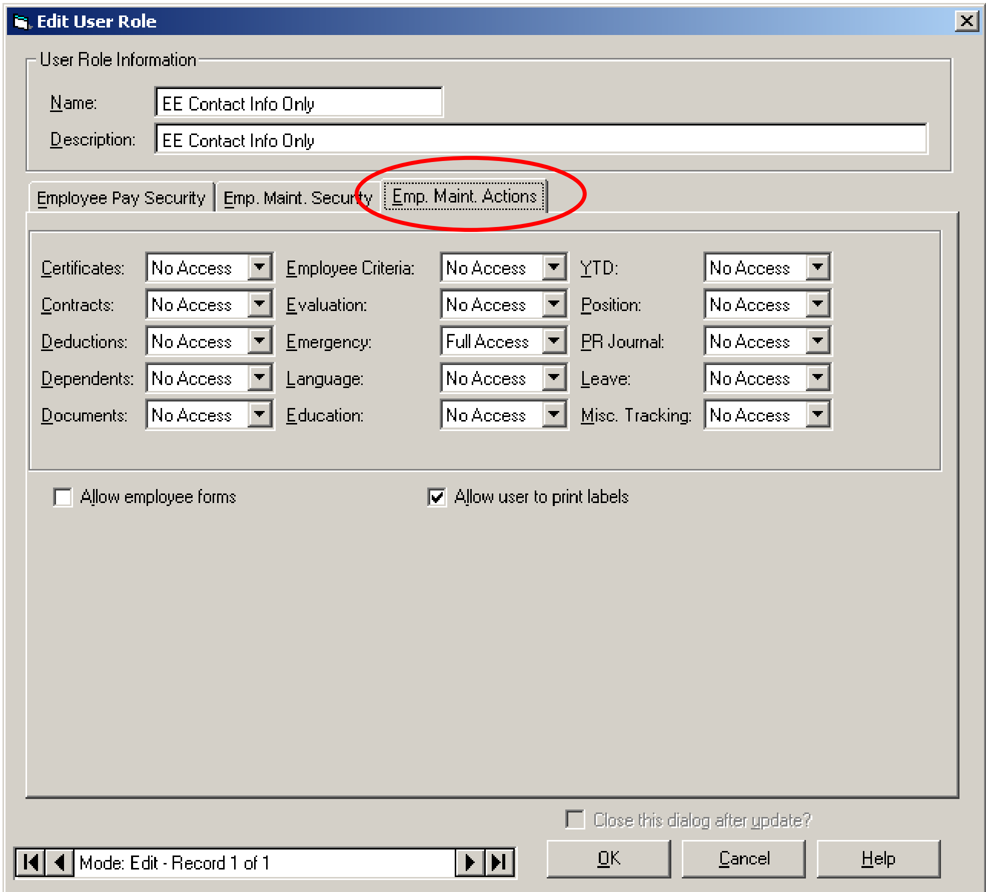
6.) Now click the Emp Maint. Actions tab. Set the level of access you want to the Action menu items available on the Employee Maintenance screen.

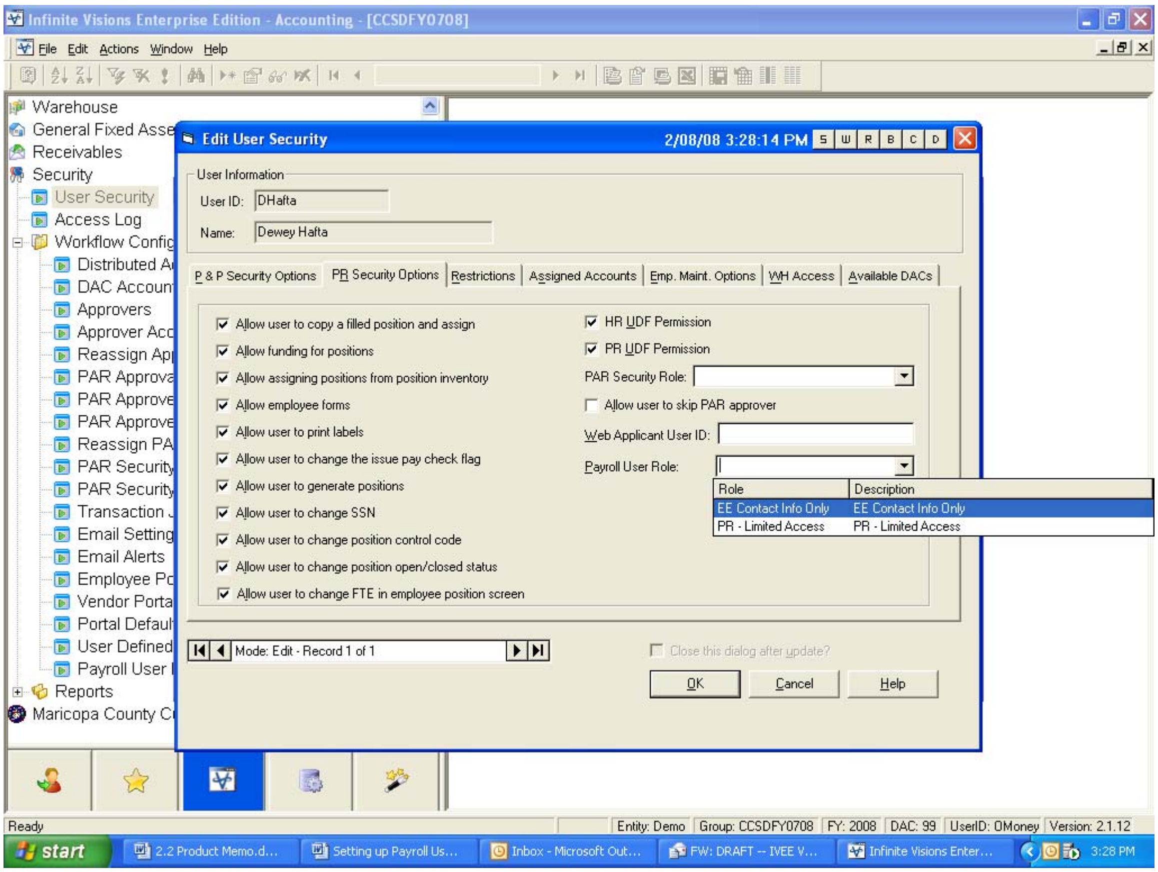


7.) When finished, click OK to save your changes. Now just repeat steps 2 – 7 for the other Payroll User Roles you wish to create.

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!