IVISIONS WEB PORTRAL

(Online Workflow and Self Service Center)

Log in to IVISIONS under the Employee Resource Center on the Webpage using your district log in and password that you use for email and your regular desktop.

BUSINESS RESOURCES

Under Business Resources , click on Information Center- This page will give you business announcements, how to contact the District Service Center staff, Forms to use for business transactions that you can download, and popular links to district business you can log into.

EMPLOYEE RESOURCES

Under Employee Resources, click on Information Center- This page will give you important employment announcements, links to Health Care Providers that you can create a log in to look at your benefit status, and employee documents that you can download to use for employment transactions.

Now click on Compensation- and Pay Period- This will give you your current month check stub outlining all of your withholdings. At the top of the screen on the right hand side is a printer button that you can print this page if needed. In the pay date there is a drop down to pick a different month within this fiscal year (July to June) to chose a different pay stub. At the bottom of the check stub is a button called paycheck calculator. If you click on this button, then submit, you will view how each pay and benefit are entered. (you can change any of the fields. Don't worry, it will not mess up anything we have at district or change anything, it is just a play calculation) you can clear all of your withholdings or change what you want, then press calculate. It will give you a sample of what your paycheck would look like with different withholdings. (NOTE: The district is required to withhold the current retirement #1).

Now click on Compensation- and Calendar Year- This is a statement of withholdings and pay for the current fiscal year(school year July through June)

Now click on Compensation- and W'2- This will show you a copy of your W'2 that you can print out (after the first of the year these will be available)

Now click on Attendance- This page will show you the breakdown of your leave plans and what has been used and available. At the bottom of the screen will be any pending leave requests that have not yet been approved. Click on Add Request. This will be the new place for you to request leave (or the same as the old leave of absence form. Depending on your school or location, you will ask prior to leaving or have help from your secretary to fill out after you are gone. Please check with your secretary on how they will be handling leave in your building). Your name will appear. All the Red Arrow boxes must be filled in. Choose a leave plan. (note this is not what you have left, but merely the name of the leave plan that you are allowed each year). Units mean how many days you will be gone. Reason means why you will be gone. If it is sick leave, you could just put illness or you could put surgery, Dr.appointment etc. It is up to you. If it is bereavement, please list the relation. Example-mother, father, husband, etc. If it is professional development or curriculum, we need specific examples. IE SIOP, Reading First etc. and in the specific use it could be Testing etc. Activity leave, please list the actual activity you are attending. If you do not have an option available to you for the actual leave, please contact Andrea Martinez to get it set up for you. Then choose the dates you will be gone or were gone. Then chose the times of your works schedule you were gone. This is especially useful if it was for ½ day. In the notes to the supervisor, you can give reasons why it is necessary to have it approved or just beg and plead. Once finished, press submit. It will let you know what supervisor it was sent to. It will now appear in your pending requests. If a request is not yet approved and you need to change the date or leave plan, you can press the modify request and have it changed and resubmitted. If you want to cancel a request you have made, press cancel a request, choose the request you want to cancel and submit. It will go back to supervisor to be approved as cancelled.

Now click on Tax Withholding Forms- This page will give you all your W-4 forms. Click on Idaho Federal W-4, press BEGIN. This will bring in your worksheet with your information on it. You can use the worksheet above to calculate your allowances, or you can just mark the boxes below with the changes. You can print the form and sign it and bring it into the district or you can press submit and it will go to a queue with the payroll department for approval. It will ask you to verify, press ok and then enter the last 4 digits of your social to verify online signature approval. (PLEASE DO NOT START USING THIS UNTIL JANUARY 1ST)

Now click on Profile- and Contact Information. This is your current contact information. If it is incorrect, press MODIFY, make the changes necessary, enter your 4 digits of your social and submit. Review and press done. The requested changes will be listed. As payroll reviews, they will adjust and post the necessary changes to all your forms and insurance providers.

Now click on Profile- and Emergency contacts. If you do not have any emergency contacts listed, please enter atleast one emergency contact.

Now click on Profile- and Personal Information- This will be the area for all your Education and Home related info. Please review for accuracy. Because we are just working on ISEE we are just getting all this data in correct. You can send a quick email to Human Resources to add any information that is not correct.

Profile-documents are any documents that you have had scanned in at district- Ie certificates etc. Currently we have not scanned any documents in.

WORKFLOW

Most employees will have workflow. Exceptions (cooks, custodians and bus drivers)

Click on Workflow- verify this is your user id and choose connection group (should be the year we are in) press OK. You are now connected to our Visions Program for Accounting.

My Workflow will be the area where you will approve any requisition you have created to make a p.o. (depending on funding and each locations allowance, you may have capability to enter your own requisitions, please check with secretary first)

Purchasing and Payables- This area will allow you to make p.o. requisitions, look up vendors currently in our district and print reports of your requests or funds.

Press Purchasing and go to the Control Panel. This area will display all the p.o.'s that you have requested. (press the apply button to see any p.o.s that you have entered. To create a new requisition press ADD NEW. Leave the requisition date same. Start typing a vendor (because this is web based it works like google search and finds as you type) Use the drop down to pick where you would like the material to be shipped. Enter your name as the requester or use the drop down to choose it. If there is anything you want to tell the vendor (example: call before sending or this is our discount number) put it in the p.o. notes. Order via: means if you are going to send by mail, fax or email. Project: choose from the drop down list. Type in when you need order delivered or required. The order type is always purchase order. Internal notes are something you want to tell the district office. Like change the address etc. Now press ADD DETAIL. Type in a description of what you are getting. (This should be close to what you would like it to display in your inventory, don't make it too wordy but enough for board to know exactly what you are getting) Example: just don't type Supplies, but also don't go into a narrative of why you need it. Unit Price is how much per item. If you are going to Walmart for a variety of items, just type the total amount of p.o. Then type quantity in the box. The account number for most of you will already be filled in. Or use the drop down to pick the correct account. There is no tax. Add freight if they are charging it. Mark the box, *close this screen after save,* if you don't have any more line items to add to the requisition and press save. If you are done making requisitions for the day, mark the box *close screen after save* and press save (Otherwise you will have to press close to get out of these area to get to the previous screens). Your requisition will now show up in your display. If you decide later you want to delete this requisition, you can highlight the line by clicking on the line and pressing the **BIG RED X, or** you can change some of the items, quantities, price or account code by highlighting the line and pressing the paper and pencil tool next to the BIG RED X. Change any necessary requisition details and press edit detail to change the quantities or price or description. Then press Save again. You have now created a requisition, but it won't get anywhere unless you approve and send it off to your secretary.

Go back to the MY WORKFLOW area. You should see **Purchase Requisitions** in bold with a parenthesis around a number. This means you have that number of requisitions to approve. Click on the words Purchase Requisitions. You can use the magnifying glass to relook at the p.o. and approve it from there, or you can just put a check mark in the box and push approve. Your p.o. will now be sitting on your secretary's desk to review and submit to the administrator of the program for approval.

Now let's go back to Purchasing and Payables and press Vendors and Vendor maintenance. Press the box APPLY. And it will bring up all the vendors in our system. Notice that we have 3322 vendors currently. By clicking any of the headers of the columns, they will sort in alphabetical order, for example click on the column header order state. It will list all of the vendors by State. I think Idaho vendor begin on page 15.(the board is asking that we try and buy local or at least Idaho if not you will have to submit a quote sheet with 3 quotes of why not) You can also drag and move columns and move lines to fit more items on one page. You can export these all to excel by pressing **Export to** Excel and pressing open.

Now let's look at report options. There are 2 reports for most employees. Vendors/Purchase orders and Purchase Orders by account. Press Vendors/Purchase Orders. Let's just leave everything as the pre populated fields ***except*** for change the requester to your name and mark the button for the Report Type: *Vendor PO Totals* and then press the button SHOW REPORT. Most of the reports will not come up until you have entered your own purchase orders into IVISIONS yourself. You then can choose different Report Types; until you see the report you want. Now press Purchase Orders by Account. You will only need to press the button Show Report. To make it more fine tuned put your account code in place of the question mark. For example Shannon Brown's construction accounts, just type 306 in the appropriate place ie. (???.???.????.???.306.???) and everything for his program would come up. Once again most of the reports will not come up until you have entered your own purchase orders into IVISIONS yourself.

Now let's look at Inventory……..Press the field called Fixed Assets. Press Reports. And then Inventory Forms (vocational teachers will have to have office print for them) Choose your Site (note, Acequia is Acequia New and Heyburn Is Heyburn New). Leave **the dash** in building. Choose <u>your name</u> for the room. Press Show Report. Please review all your inventory and mark on the paper any additions or deletions and turn into office before April 1st. Disposition of Fixed asset forms are on the business resources tab under forms.

Principals and secretaries will have additional tabs in workflow to approve leave. And they will have a Staff Info tab to look at staff they are assigned to in their buildings. At no time should any staff member have a tab called Administration. Anyone who has these additional tabs needs to let us know immediately.