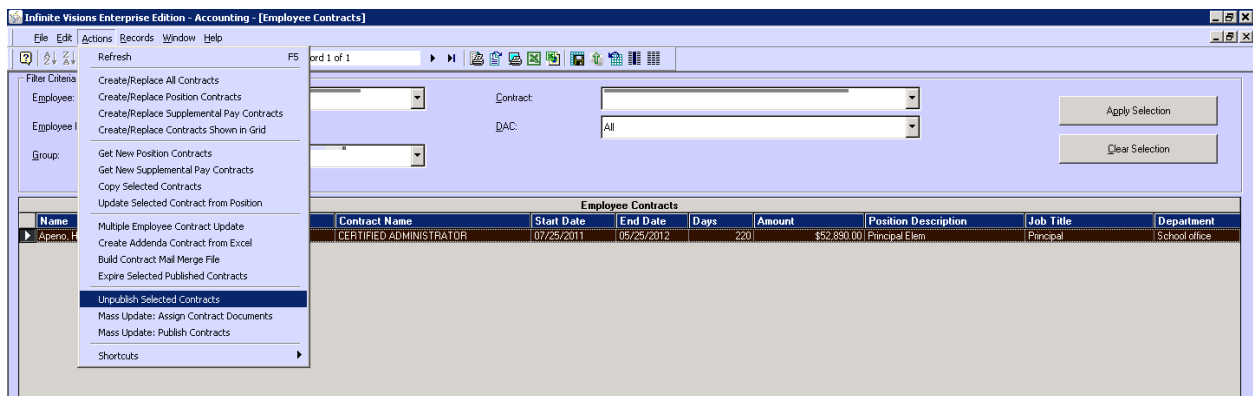


iVisions Web Portal - Republishing a Contract

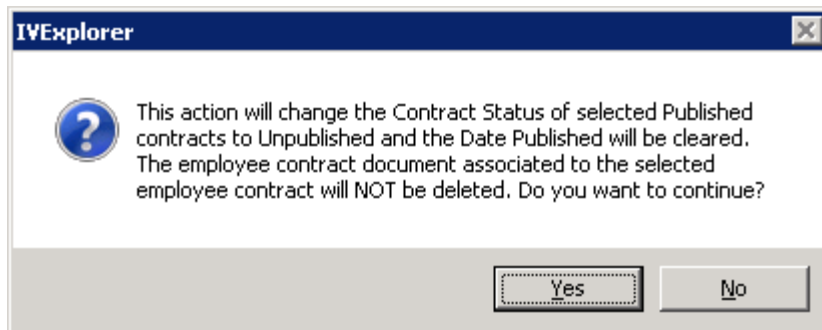
This document guides user through two common scenarios of revising a contract that was published on iVisions Web Portal.

Scenario number 1 – A contract was published to the portal, and we find an error. So we have to fix the contract.

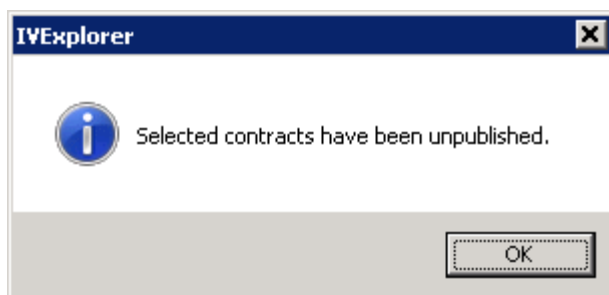
Find and filter on the contract in HR, Contracts, Employee Contracts. With your cursor on the record, go to Actions, and Unpublish.



You will receive the following informational warning, click Yes.



Then click OK.



You must open the Employee Contract Record and remove the Contract Document from the Select Contract Document field.

If you just have to make changes to the fields within the Employee Contract, make the necessary changes, and save the record.

You may have to change the position. Once you made changes to the position, save the position.

Back in Employee Contracts, use the Actions menu item entitled, Update Selected Contract from Position. This will update the contract record with any modified information from the position.

Edit Employee Contract

Actions

Employee Selection

Employee ID: AP88828 Name: Apeno, Hal SSN: XXX-XX-8828

Employee Contract Information

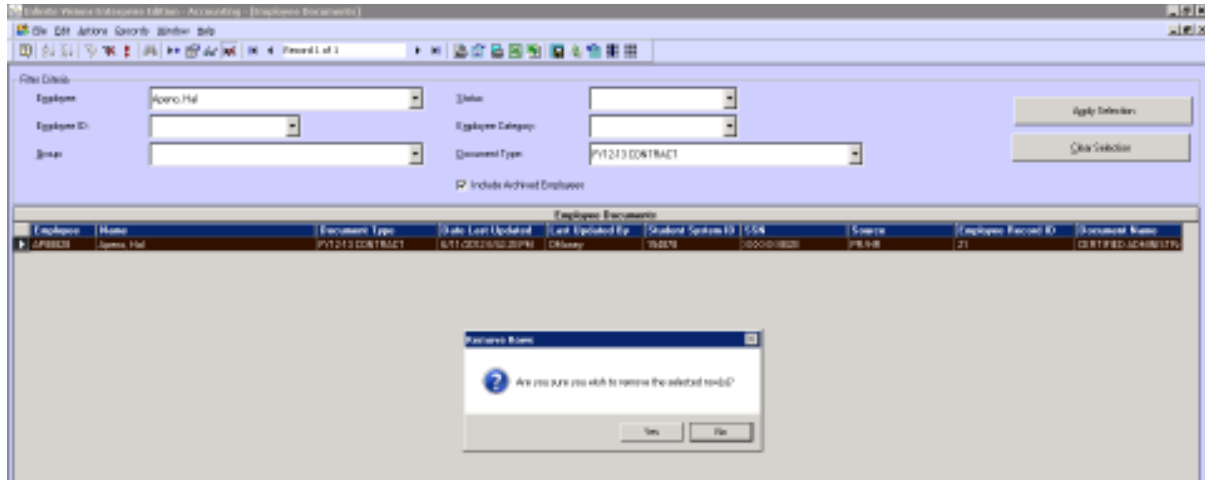
Contract: CERTIFIED ADMINISTRATOR Pay Type: Position
DAC: Capital City Elementary School Position Type: Principal
Department: School office
Description: Principal Elem Pay Basis: Salary
Start Date: 07/25/2011 Pay Method: Work Agreement
End Date: 05/25/2012 ETE: 1.0000 Days: 220.00 Hours Per Day: 8.0000
Amount: \$52,890.00 Hourly Rate: \$30.05 Daily Rate: \$240.41
Salary Schedule: Administrators Salary Row: [Min] Column: [Admin 1]
Link Type: Projection Select Contract Document: ID ADMINISTRATOR CONTRACT.PDF
☒ Is Current

Mode: Edit - Record 1 of 1 ☐ Close this dialog after update?

OK Cancel Help

And you will want to delete the contract document from the employee's portal. From Employee Contract, you can use the Shortcut to quickly get to Employee Documents.

Go to Actions, Shortcuts, Employee Documents. Then find, highlight and delete the document.

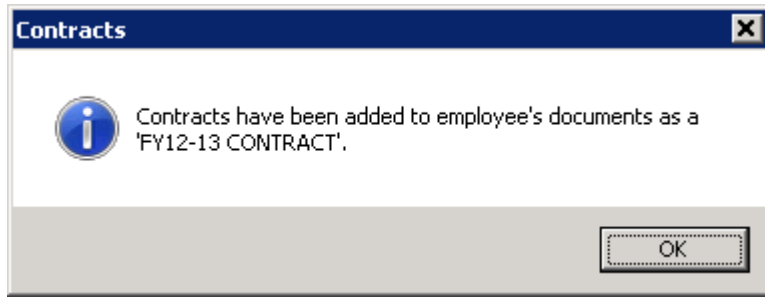


When you file close, you will be back in Employee Contracts.

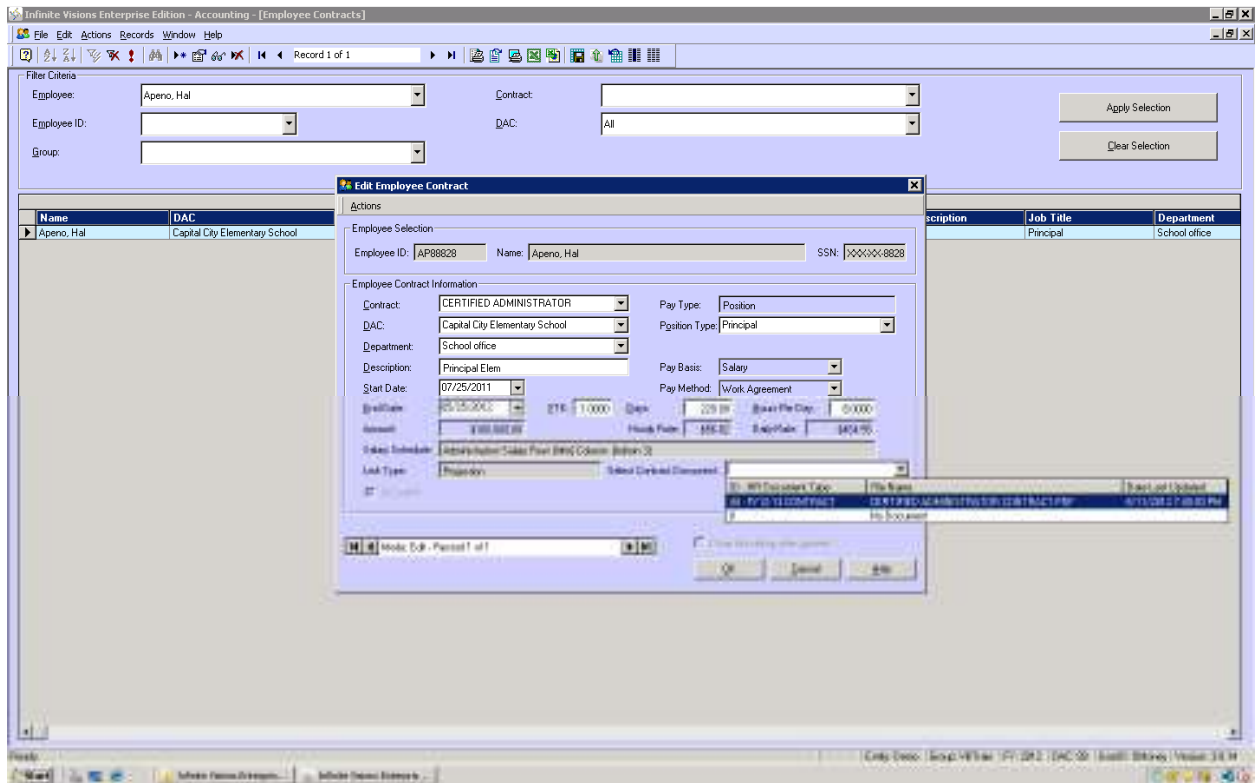
From Employee Contracts, use the Actions, Shortcuts, Print Contracts option to Append the contract to the Document Type. You may need to complete the following fields: Contract, Employee Name, Fiscal Year, Date, Comment, Append Contract To Employee Documents and select the Contract Documents.

A screenshot of the 'Contracts' dialog box. The dialog has a title bar 'Contracts' and a close button. It is divided into several sections: 'Selection Parameters' with dropdowns for Contract (CERTIFIED ADMINISTRATOR), Employee (Apeno, Hal), Employee ID, Status, Employee Category, and Group; 'Report Options' with a 'Sort By' dropdown (Last Name), a 'Group By Check Location' checkbox, a 'Check Location' dropdown, and a 'Leave Rate Start Date' dropdown (None); 'Print Information' with 'Fiscal Year' (2009-2010), 'Date' (None), a 'Comments' text field, and checkboxes for 'Print on Legal Paper', 'Mask SSN', and 'Attempt to keep "After Text" section with signatures'; 'Distribution Options' with a checked 'Append Contract to Employee Documents' checkbox, a 'Document Type' dropdown (FY12-13 CONTRACT), an 'Email Contract to Employee' checkbox, a 'CC Email' text field, an 'Include Comments' checkbox, and a 'Save Images' checkbox. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

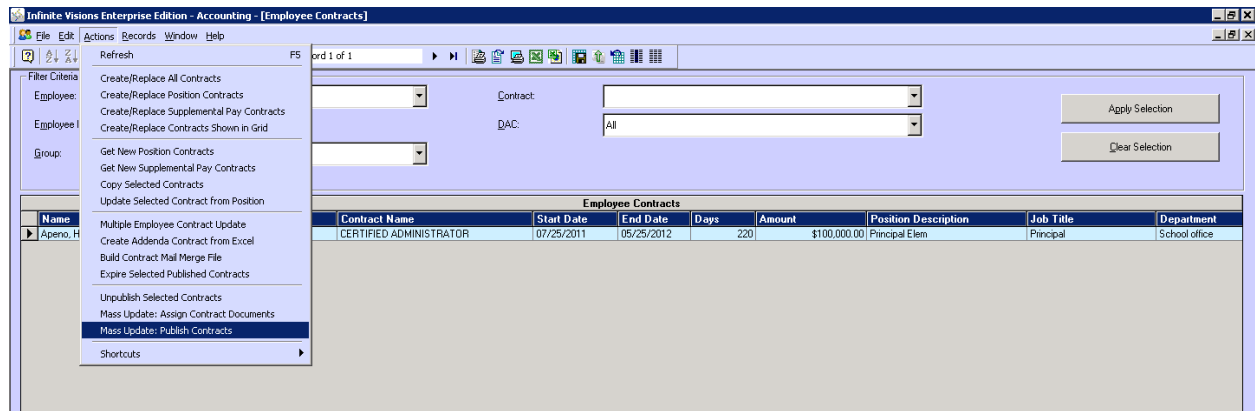
Click Ok.



In HR, Contracts, Employee Contracts and select the Contract Doc you just appended.



Click OK.



With cursor on the Employee Contract, go to Actions and Mass Update: Publish Contract.

Contract is now ready for employee to review.

Scenario 2

Employee rejects contract and you must republish revised contract.

Windows Web Site

Home Business Resources Employee Resources My Staff Home My Workflow

Monday, June 11, 2012

Employee Resources > Employee Contract Approval

Doris Ajar Logout

Actions- Employee Contract

Select: CERTIFIED-ADMINISTRATOR View

☐ I accept the CERTIFIED-ADMINISTRATOR

☒ I do NOT accept the CERTIFIED-ADMINISTRATOR

Comments:

Not Enough Money

Characters left: 204

Select a contract using the Contract drop down, then click the [View Contract](#) button to review the contract. You also have the option to save the contract to your hard drive. To [Accept](#) or [Reject](#) the selected contract, select the appropriate radio button, enter any comments concerning the contract (if desired), and then click the [Submit](#) button.

By clicking the [Submit](#) button, you are agreeing to or rejecting the terms and conditions of the selected contract.

Submit

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Infinite Visions Enterprise Edition - [Contract Status (Portal)]

File Export Window Help

Actions

Record 1 of 1

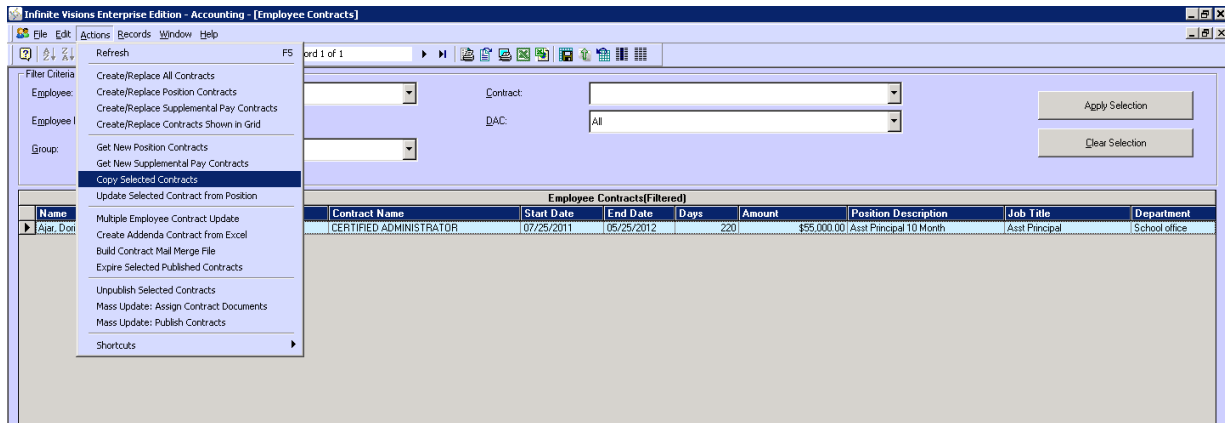
Filter Criteria

Employee: Ajar, Doris Employee ID: Contract Status: All Contract:

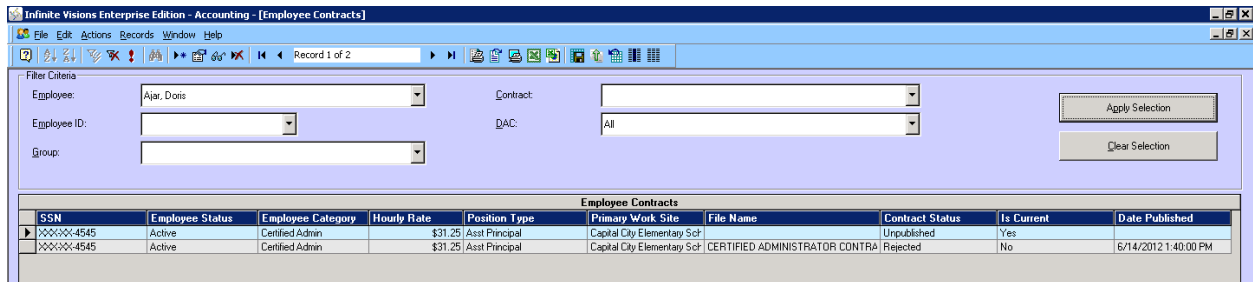
Contract Status									
Employee	Employee ID	Name	Position	Status	Date Published	Status Date	Start Date	End Date	Comments
48	AJ54545	Ajar, Doris	Asst Principal 10 Month	Rejected	6/11/2012 7:05:00 PM	6/11/2012 8:37:00 PM	7/25/2011	5/25/2012	Not Enough Money

If necessary, fix the position.

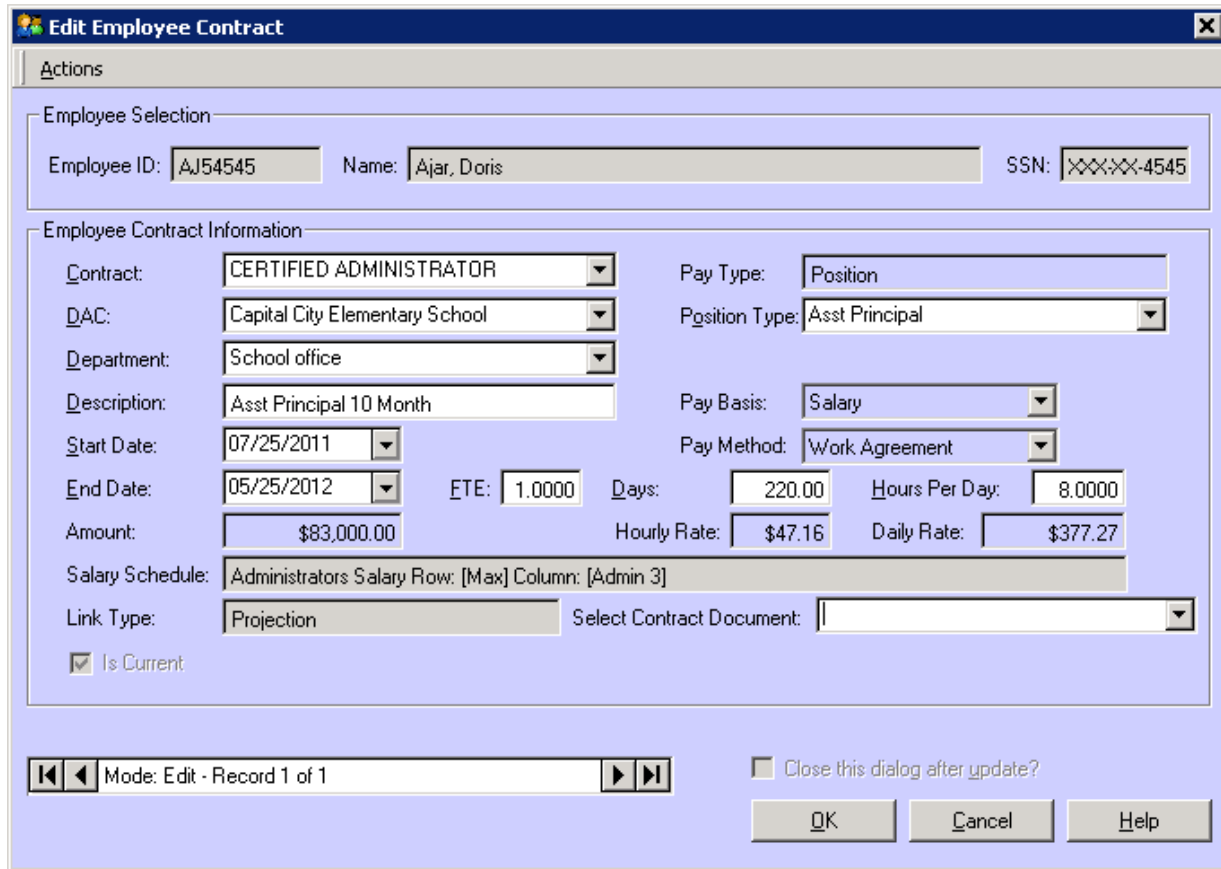
Go to Employee Contracts, Actions and Copy the Rejected Contract.



You can easily find the copied contract by scrolling to the right and there you will see the Is Current field. The copied contract will have a Yes in the Is Current Field. The rejected contract will show Rejected in the Contract Status Field and will have a No entered in the Is Current field.



If necessary, manually edit the copied contract. If a position change was required, then you should also use the Actions menu item from the grid to Update Selected Contract from Position.



The dialog box is titled "Edit Employee Contract" and features a tabbed interface with the "Actions" tab selected. It is divided into two main sections: "Employee Selection" and "Employee Contract Information".

Employee Selection:

- Employee ID:
- Name:
- SSN:

Employee Contract Information:

Contract:	<input type="text" value="CERTIFIED ADMINISTRATOR"/>	Pay Type:	<input type="text" value="Position"/>
DAC:	<input type="text" value="Capital City Elementary School"/>	Position Type:	<input type="text" value="Asst Principal"/>
Department:	<input type="text" value="School office"/>	Pay Basis:	<input type="text" value="Salary"/>
Description:	<input type="text" value="Asst Principal 10 Month"/>	Pay Method:	<input type="text" value="Work Agreement"/>
Start Date:	<input type="text" value="07/25/2011"/>	ETE:	<input type="text" value="1.0000"/>
End Date:	<input type="text" value="05/25/2012"/>	Days:	<input type="text" value="220.00"/>
Amount:	<input type="text" value="\$83,000.00"/>	Hours Per Day:	<input type="text" value="8.0000"/>
		Hourly Rate:	<input type="text" value="\$47.16"/>
		Daily Rate:	<input type="text" value="\$377.27"/>
Salary Schedule:	<input type="text" value="Administrators Salary Row: [Max] Column: [Admin 3]"/>		
Link Type:	<input type="text" value="Projection"/>	Select Contract Document:	<input type="text"/>

☒ Is Current

Mode: Edit - Record 1 of 1

☐ Close this dialog after update?

OK Cancel Help

Append the Contract to the Contract Document.

In Employee Contracts, this can be done by using the Shortcut.

Go to Actions, Shortcuts, Print Contracts option from Employee Contracts.

You may need to complete the following fields: Contract, Employee Name, Fiscal Year, Date, Comment, Append Contract to Employee Documents and select the Contract Documents.

Contracts

Selection Parameters

Contract: CERTIFIED ADMINISTRATOR
Employee: Ajar, Doris
Employee ID:
Status:
Employee Category:
Group:

Report Options

Sort By: Last Name
☐ Group By Check Location
Check Location:
Leave Rate Start Date: (None)

Print Information

Fiscal Year: 2009-2010 Date: (None)
Comments:
☐ Print on Legal Paper ☒ Mask SSN
☒ Attempt to keep "After Text" section with signatures

Distribution Options


☒ Append Contract to Employee Documents
Document Type: FY 12-13 Revision 1 Contract
☐ Email Contract to Employee
CC Email:
☐ Include Comments

☐ Save Images

OK Cancel Help

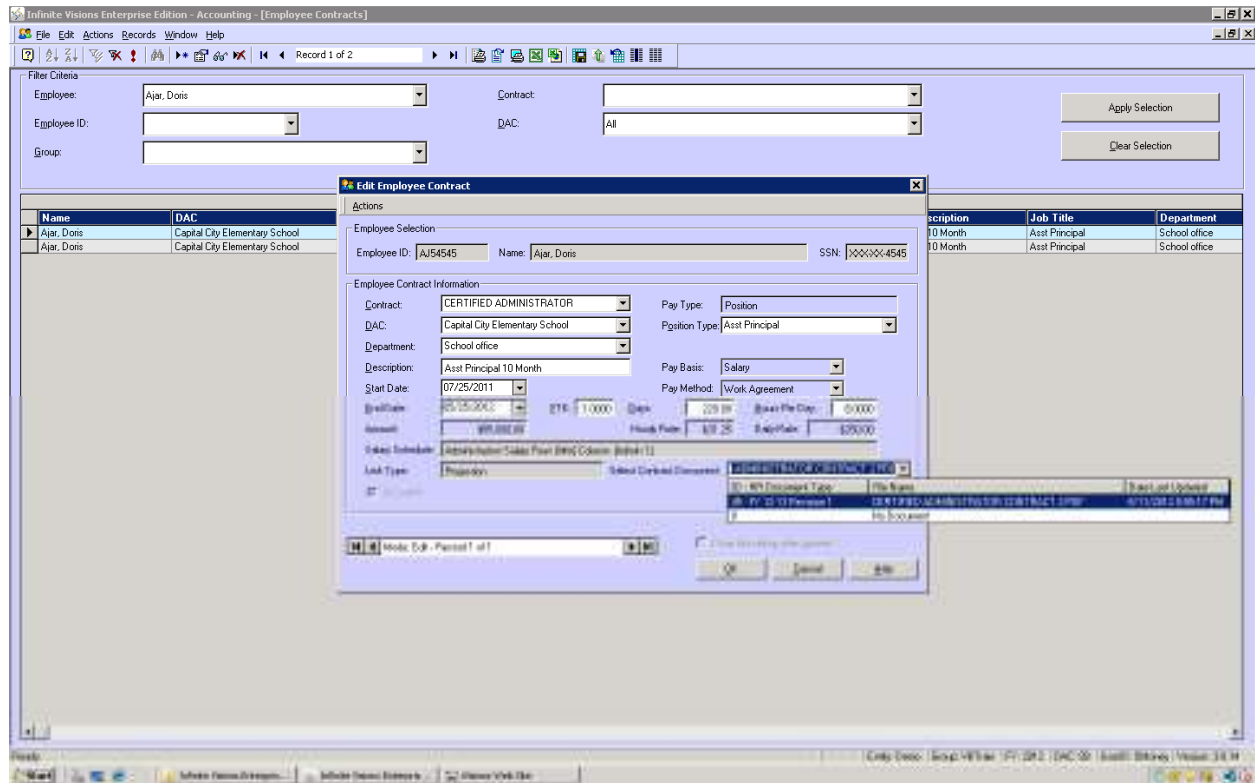
Click Ok.

Contracts

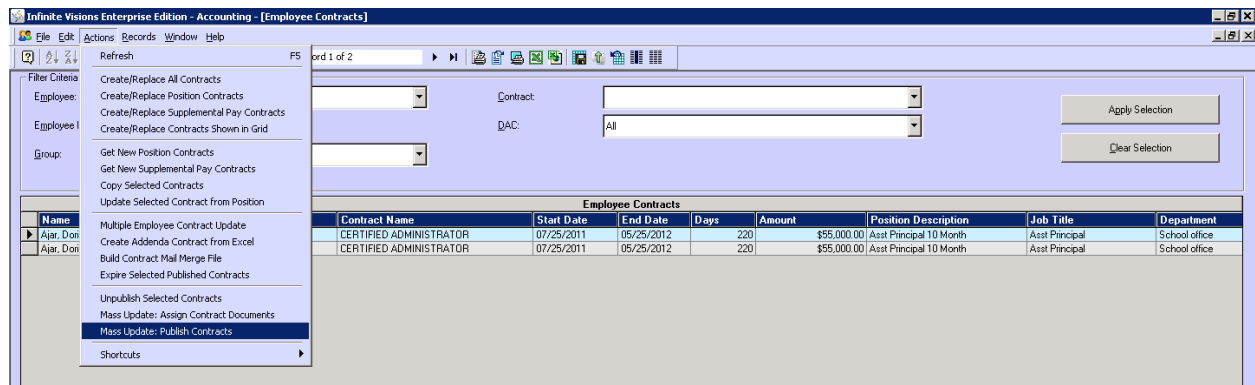
 Contracts have been added to employee's documents as a 'FY12-13 CONTRACT'.

OK

If you used the shortcut, then when you close out of the Print Contract you should be back into: HR, Contracts, Employee Contracts. Open the Contract and select the Contract Doc you just appended.



Click OK.



With cursor on the Employee Contract, go to Actions and Mass Update: Publish Contract.

Note: Employee will have access to view both the Rejected Contract and the Newly Published Contract.