

TABLE OF CONTENTS

Creating Virtual Employee Code.....	2
Linking Subs to Employees.....	3
Moving Subs into a Payroll.....	6
Extracting Data.....	7

Creating Virtual Employee Code

Human Resources/Employee Information

At the top of the screen, click on CUSTOM FIELD

Update Record Custom Field Column Chooser Refresh

Display Order	Field Name	Data Type
1	Assigned Parking Space	Text
* 2	Virtual Employee	Check Box
*		

Click the BLUE +
Enter a field name and under the Data Type column select CHECK BOX
Click SAVE

Save Cancel

Design Custom Fields process was successful.

OK

Click OK

Now go to the employee. Do an update and click on Custom Fields.

You will see your new code listed. Click on the Box so a check mark will be entered. Click SAVE and CLOSE

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields

Field Name	Value
Assigned Parking Space	
Virtual Employee	<input checked="" type="checkbox"/>

Linking Subs to Employee

Click Human Resources/Daily Attendance

Double click on an employee

Click on the date the employee was out. Either on the big calendar or the little calendars to the left.

Click UPDATE

Update Save Save and Close Notes Search

Employee ID: 20 Employee Name: Personnel, Mary A Position Name: HR Clerk Fiscal Year: 2021

Full-Year Attendance Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Aug 30	Aug 31	Sep 1	Sep 2	Sep 3	Sep 4	Sep 5
Sep 6	Sep 7	Sep 8	Sep 9	Sep 10	Sep 11	Sep 12
Sep 13	Sep 14	Sep 15	Sep 16	Sep 17	Sep 18	Sep 19
Sep 20	Sep 21	Sep 22	Sep 23	Sep 24	Sep 25	Sep 26
Sep 27	Sep 28	Sep 29	Sep 30	Oct 1	Oct 2	Oct 3

September 2020
Su Mo Tu We Th Fr Sa
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

October 2020
Su Mo Tu We Th Fr Sa
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31

November 2020
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30

Add Edit Delete

Attendance Detail Attendance Totals

Then click on the Blue +

Add Absent

Employee ID: 20

Employee Name: Personnel, Mary A

Building: ADMINISTRATIVE CENTER

Attendance Code:

Attendance Type: Unit Taken

Donation Bank:

Substitute ID:

Substitute Name:

Reason:

Absent Type: Full Day

Start Date: 9/15/2020 End Date: 9/15/2020

Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Add Cancel

Attendance Code – Click on the Binoculars to select the type of time they took off.

Substitute Name – Click on the binoculars and find the sub

Reason – will automatically populate based on the Attendance Code but can be changed.

Absent type will default to full day, but you can click the drop down and select Partial day and put in the amount of the day they subbed.

Click ADD when done

You will be taken back to the calendar. Click SAVE and CLOSE.

Update Save Save and Close Notes Search

Employee ID: 20 Employee Name: Personnel, Mary A Position Name: HR Clerk Fiscal Year: 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Aug 30	Aug 31	Sep 1	Sep 2	Sep 3	Sep 4	Sep 5
Sep 6	Sep 7	Sep 8	Sep 9	Sep 10	Sep 11	Sep 12
Sep 13	Sep 14	Sep 15 JD	Sep 16	Sep 17	Sep 18	Sep 19
Sep 20	Sep 21	Sep 22	Sep 23	Sep 24	Sep 25	Sep 26
Sep 27	Sep 28	Sep 29	Sep 30	Oct 1	Oct 2	Oct 3

Attendance Detail Attendance Totals

Absent Date	Attendance Code	Attendance Type	Donation Bank Name	Attendance Units	Building Name	Substitute Name	Attendance Reason
09/15/2020	JD	Unit Taken		0.5000	ADMINISTRATIVE C...	Subteach, Jane E	JURY DUTY

VERIFYING YOUR DATA

Human Resources/Reports/Attendance Reports/Daily Attendance

If you want to see just one day's worth of work, enter the start and end dates as the same date.

Click RUN

Daily Attendance

This report provides a daily attendance listing by date range for selected employee(s)

Report Criteria

Attendance Code(s): All

Building(s): All

Employee Group(s): All

Employee(s): All

Primary Sort: Name

Secondary Sort: Name

Show Taken/Donated Units Only

Employee Status

Active On Leave

Inactive Retired

Temporary

Start Date: 09/23/2020

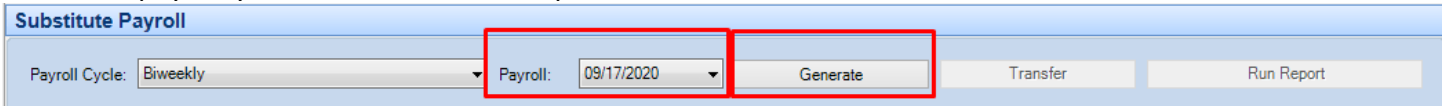
End Date: 09/23/2020 Prior Year

Shared Editable + [Print] [Close] [Export] Run Cancel

Moving Subs into Payroll

Go to Payroll/Substitute Payroll/Substitute Payroll

Select the payroll you want the subs to be paid in and click Generate

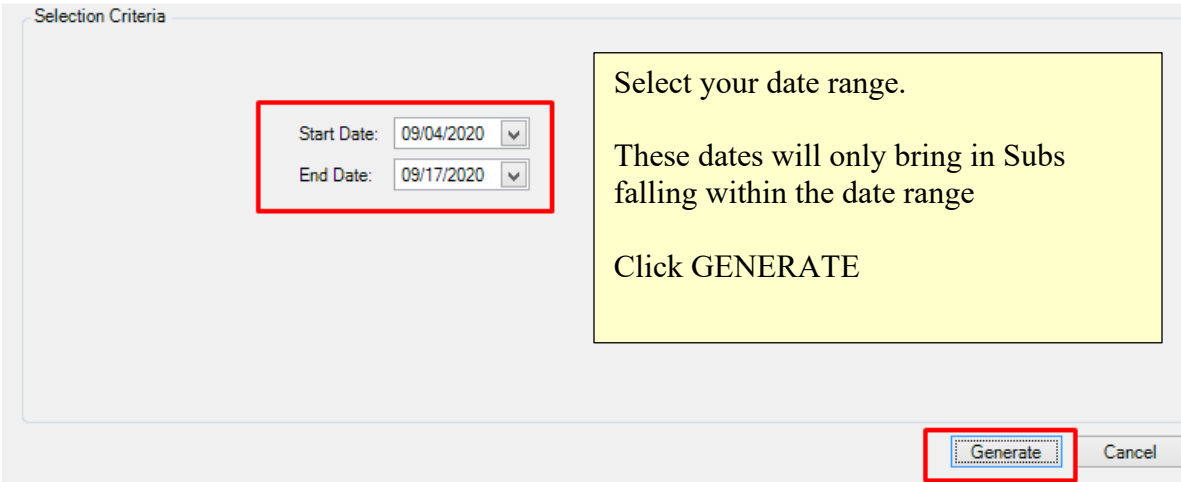


Substitute Payroll

Payroll Cycle: Biweekly Payroll: 09/17/2020 Generate Transfer Run Report

Generate Substitute Payroll

Generate the information needed to process the substitute payroll for the selected date range.

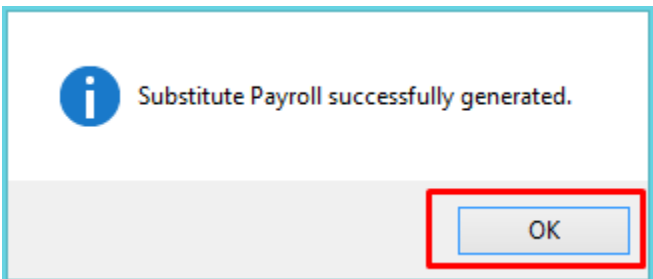


Selection Criteria

Start Date: 09/04/2020 End Date: 09/17/2020

Select your date range.
These dates will only bring in Subs falling within the date range
Click GENERATE

Generate Cancel

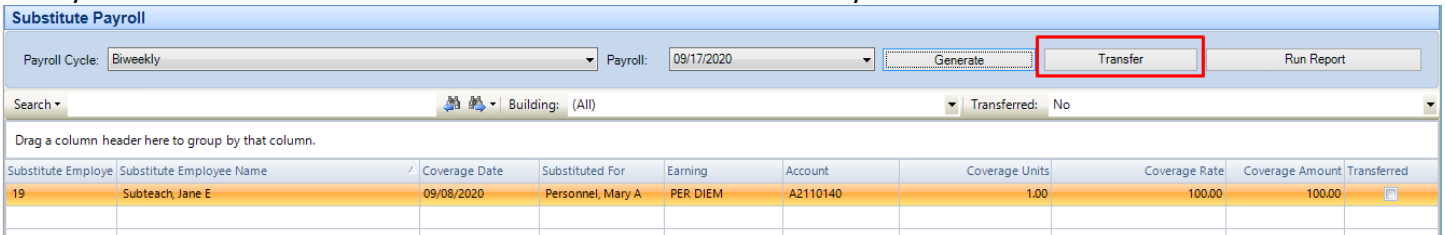


Substitute Payroll successfully generated.

OK

You will receive a confirmation.
Click OK

Now you need to click TRANSFER to move the records into the Payroll



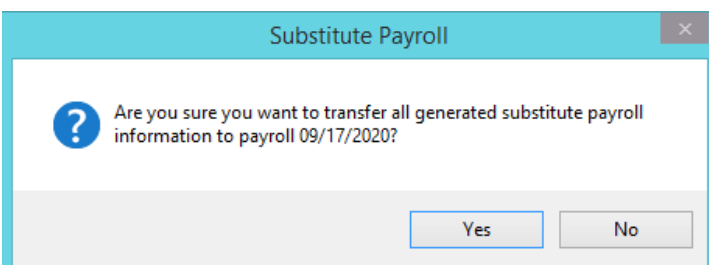
Substitute Payroll

Payroll Cycle: Biweekly Payroll: 09/17/2020 Generate Transfer Run Report

Search Building: (All) Transferred: No

Drag a column header here to group by that column.

Substitute Employee	Substitute Employee Name	Coverage Date	Substituted For	Earning	Account	Coverage Units	Coverage Rate	Coverage Amount	Transferred
19	Subteach, Jane E	09/08/2020	Personnel, Mary A	PER DIEM	A2110140	1.00	100.00	100.00	<input type="checkbox"/>



Substitute Payroll

Are you sure you want to transfer all generated substitute payroll information to payroll 09/17/2020?

Yes No

Once you click YES, the grid will be empty

Retrieving Data

1. You need to create 2 crystal reports and take to excel.
 - a. One to identify the virtual staff
 - b. One for identifying who was out on the day(s) in question
2. Then go to the Employee Information screen in Nvision and put the following fields in the grid and then export it

Name	Employee ID	Email	Building	Phone
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3. Do a Vlookup with the two crystal reports against the Nvision Employee Grid.
 - a. Those that come back with an employee number, you would remove from the Grid, leaving you with just those that were in the district.