

Overview

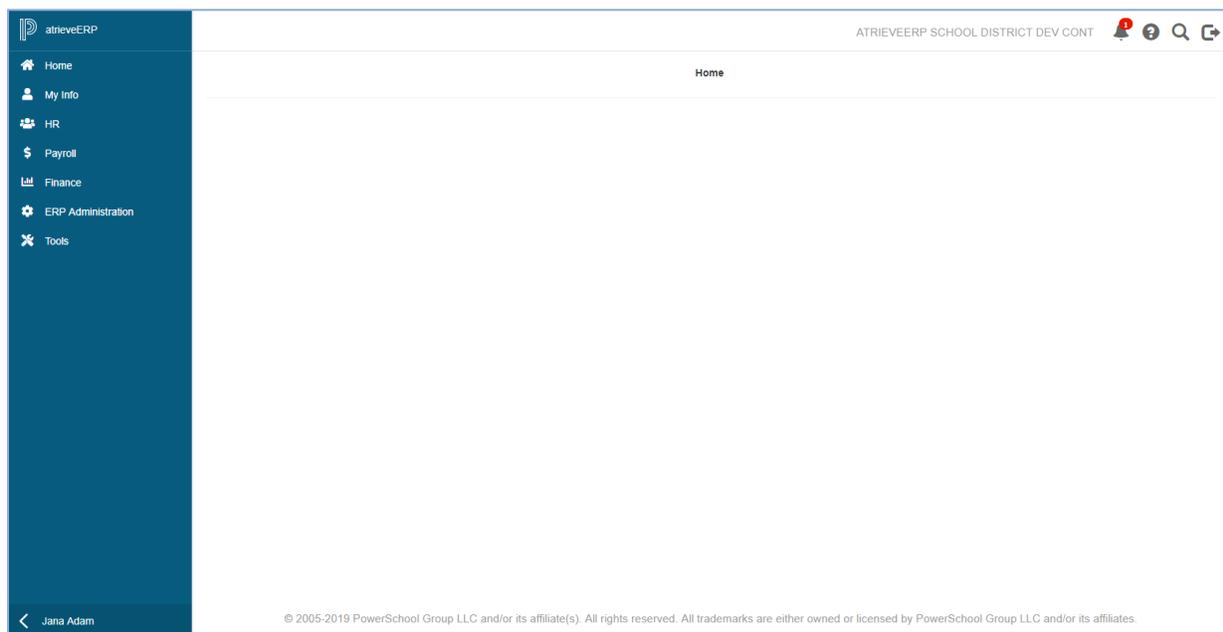
This document includes information about the new standardized menu and how menu items now map into the standard menu. Note that customization of the standard menu is prohibited, and there is limited customization capability for individual menu items. Menu item names previously customized by your district will be set to the new standard default values, so depending on the current level of menu customization at your district there may be a need for updated training and documentation once you upgrade to the Spring 2019 release.

This document can be used for branding purposes to update your district/divisions internal documentation, and as well may be used as a training tool to familiarize your users with the new menu structure.

Note: For branding purposes, if the images in this document meet your district's needs, you can right click on an image and choose 'Save Picture As' and save the image locally so that you may include in your own documentation.

New Standardized Menu Mapping

The new web portal page layout and standardized menu, available in the Spring release of 2019 replaces the existing portal. For detailed information about the web portal changes, refer to documentation available on the PowerSchool Community.



The navigation menu serves as the central point from which to navigate the pages of attrieveERP and includes the following standard links: Home, My Info, HR, Payroll, Finance, ERP Administration, and Tools. Menu items are further grouped under the Main menu into categories.

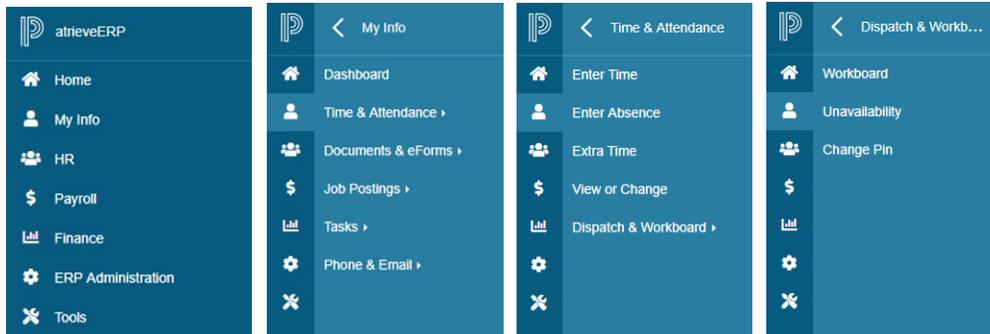
The menu items that display are based on the signed in user's Role. If the signed in user does not have access to any Finance functions, for example, then this menu item will not display. Your district controls the menu items that are available to each user when they sign in to the web portal. For more information about the new Menu Builder refer to documentation located on the PowerSchool Community.

My Info Menu

The My Info menu is where you will find programs and functions that are typically available to all employees. The following section includes a breakdown of all menu items that you may select to be included in the My Info menu. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

My Info > Time & Attendance

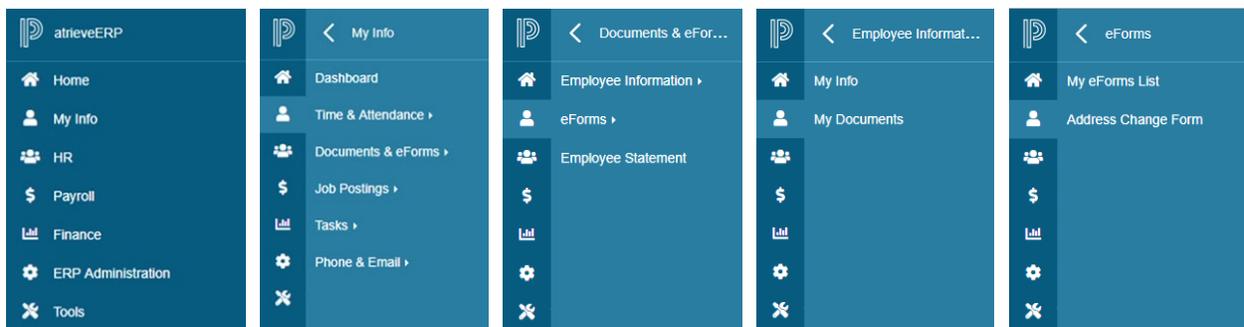
The Time & Attendance menu is where you will go to enter your time sheet, enter an absence or view the workboard.



My Info > Documents & eForms

The Documents & eForms menu is where you will go to access your statements for earnings, benefits and T4's, and where you may access your eForms and other Documents.

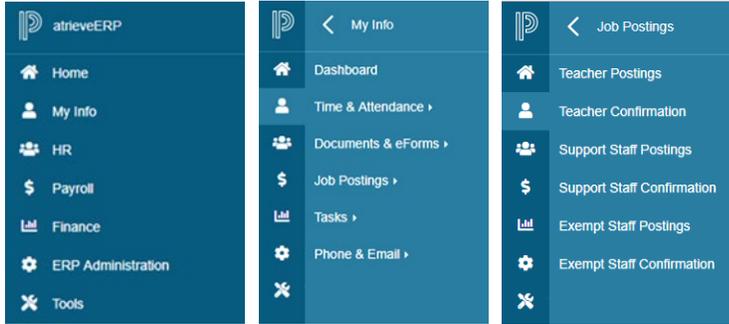
Note that the 'Address Change Form' below is just an example of a custom eform that your district may choose to add to this menu; you have the option to configure up to 10 employee specific eForms and have those display in this menu. The menu item names for these employee eForms are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.



My Info > Job Postings

The Job Postings menu is where you will go to view current postings and apply to positions. See the images below for a complete listing of menu items available for this category.

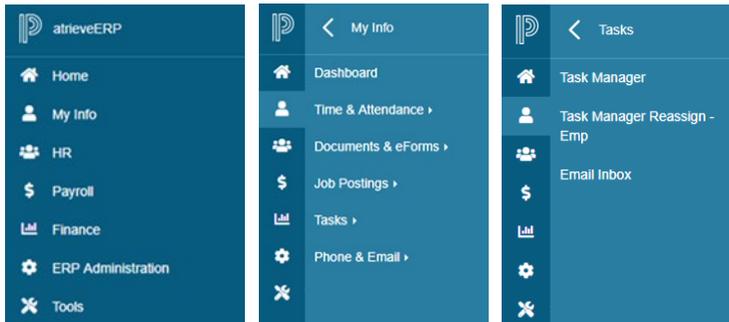
Note that the menu item names 'Exempt Staff Postings' and 'Exempt Staff Confirmation' are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.



My Info > Tasks

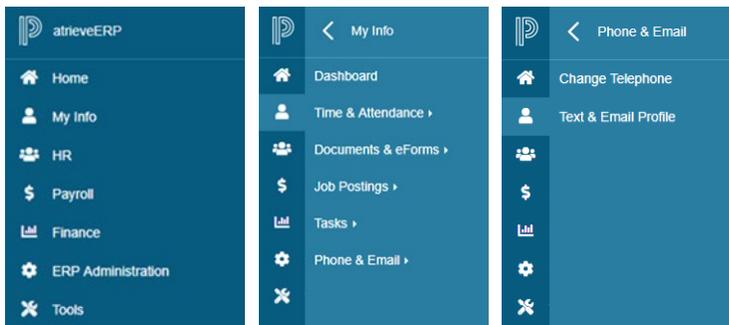
The Tasks menu is where you will go to access your tasks.

Note that you may also access your task list by clicking on the Task icon in the page header bar.



My Info > Phone & Email

The Phone & Email menu is where you will go to Change your Telephone, Text and Email Profile.

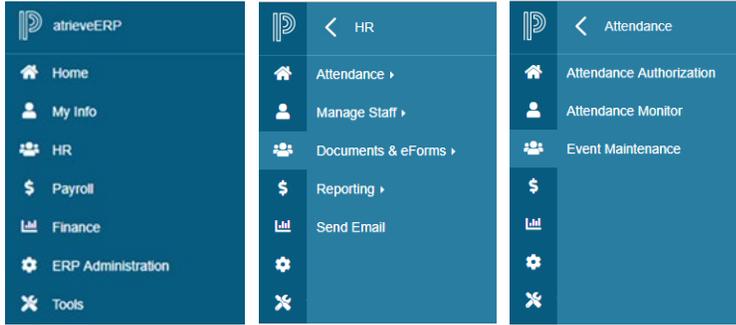


HR Menu

The HR menu is where you will find programs and functions that are typically available to Human Resources staff. The following section includes a breakdown of all menu items available in HR. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

HR > Attendance

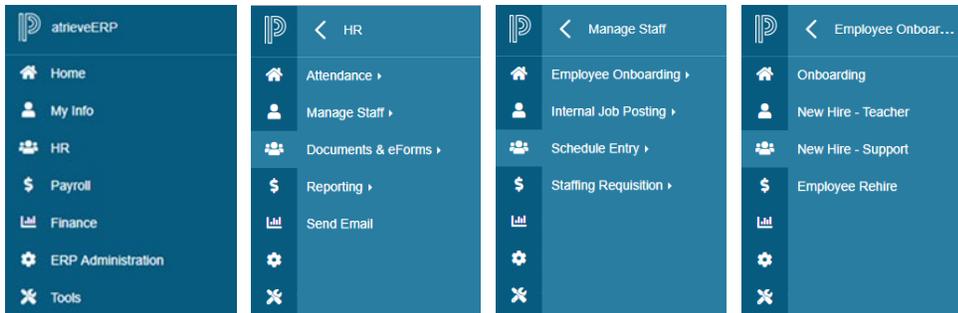
The Attendance category provides access to Attendance Authorization, Monitor and Event Maintenance.



HR > Manage Staff > Employee Onboarding

Manage Staff, Employee Onboarding is where you will go to onboard employees including managing the form package that is specific to the hire type.

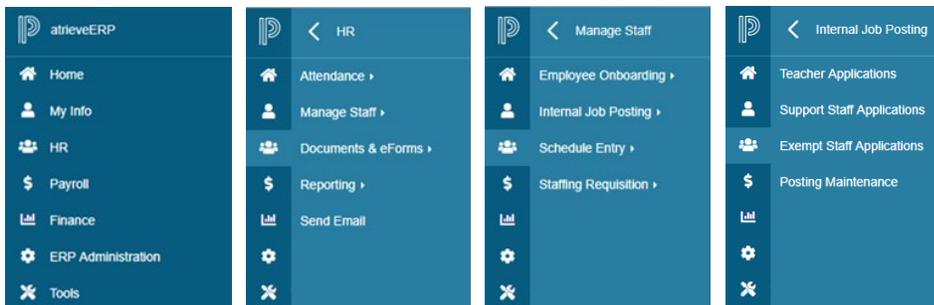
Note that the menu items 'New Hire – Teacher', 'New Hire - Support' and 'Employee Rehire' are district definable forms. The print screen below is just an example of what you may configure. The menu item names for these onboarding eForms are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.



HR > Manage Staff > Internal Job Posting

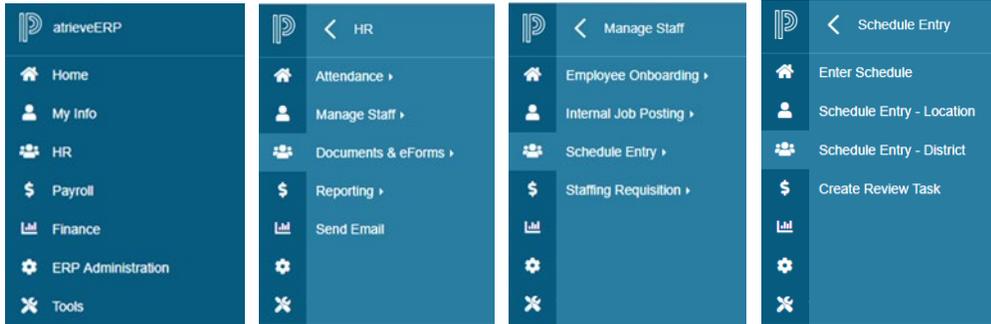
Manage Staff, Internal Job Posting is where you will go to manage postings and applications.

Note that the menu item names 'Exempt Staff Postings' and 'Exempt Staff Confirmation' are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.



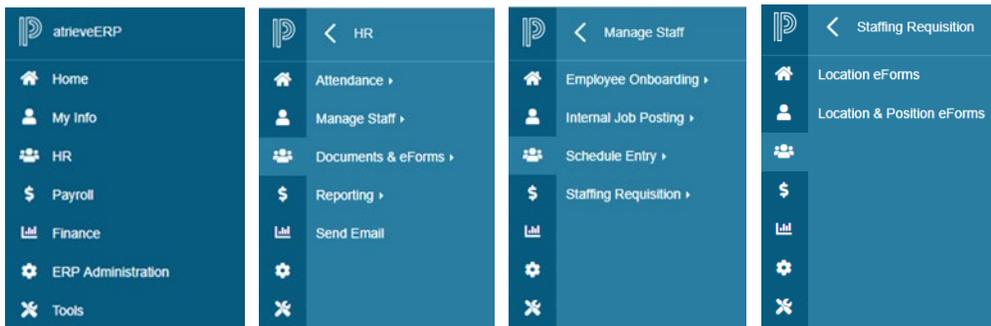
HR > Manage Staff > Schedule Entry

Manage Staff, Schedule Entry is where you will go to add or modify schedules



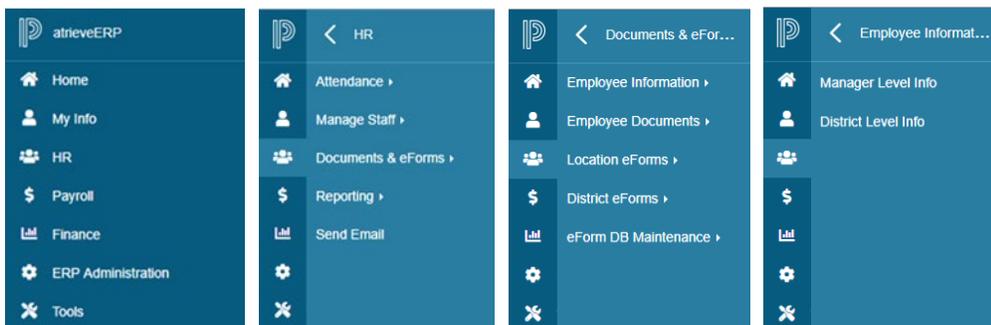
HR > Manage Staff > Staffing Requisition

Manage Staff, Staffing Requisition is where you will access Location and Position staffing requisition forms



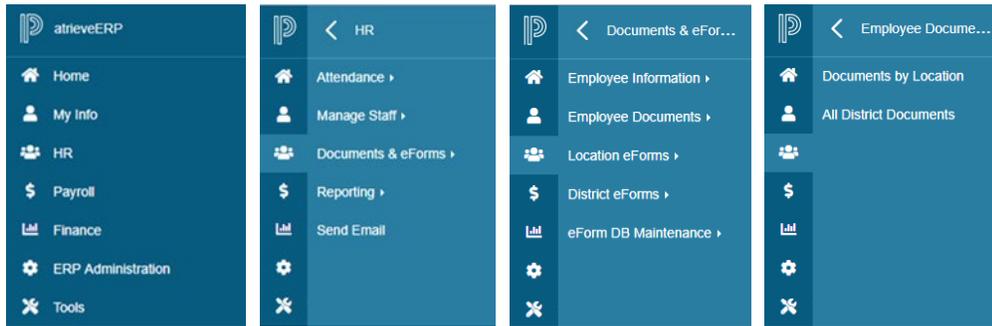
HR > Documents & eForms > Employee Information

Employee Information is where you will go to access manager or district level employee information.

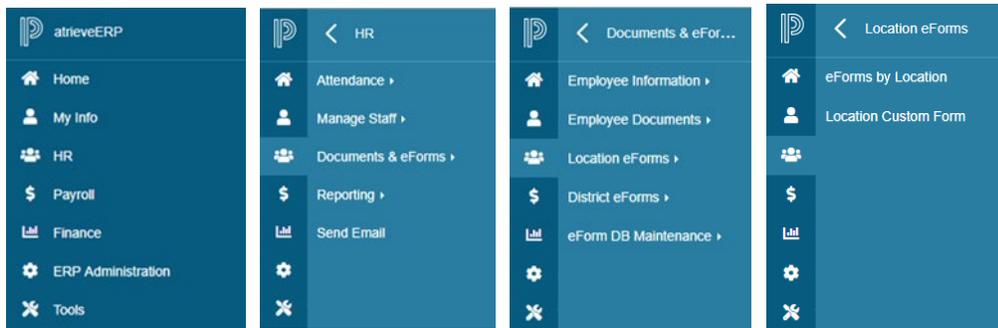


HR > Documents & eForms > Employee Documents

Employee Documents is where you will go to access location and district employee documents



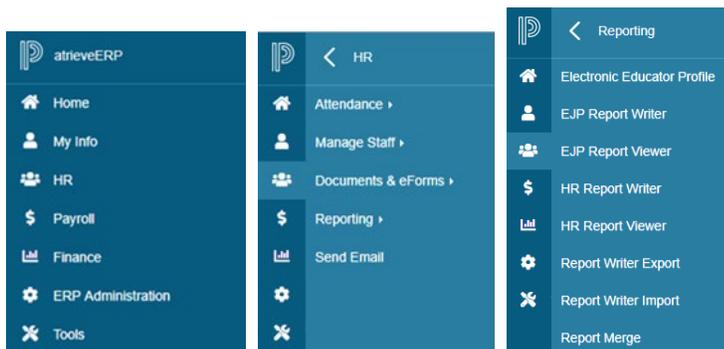
HR > Documents & eForms > Location eForms / District eForms / eForm DB Maintenance



HR > Reporting

Reporting is where you will go to access the different report viewers and report writers

Note that if you have different environments configured for HR reporting that the menu item names are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.

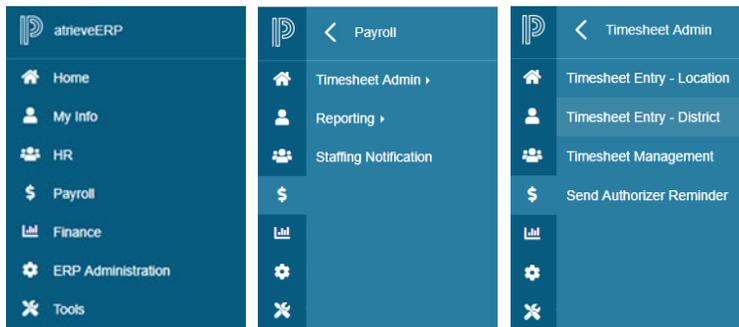


Payroll Menu

The Payroll menu is where you will find programs and functions that are typically available to Payroll staff. The following section includes a breakdown of all menu items available in Payroll. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

Payroll > Timesheet Admin

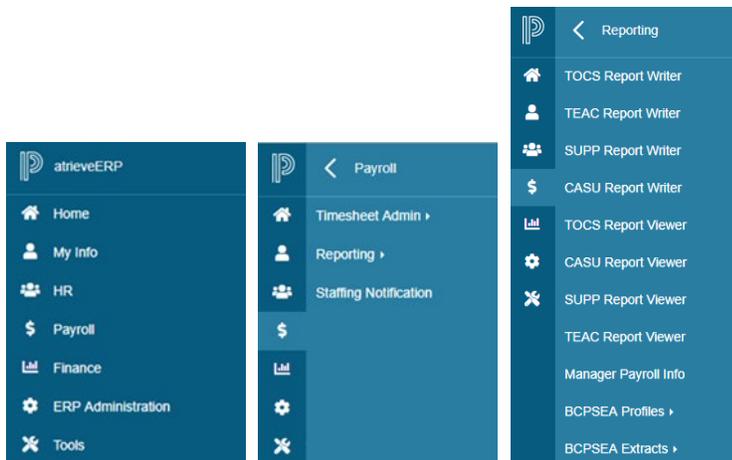
Timesheet Admin is where you will go to access Location and District timesheet management



Payroll > Reporting

Reporting is where you will go to access the different report viewers and report writers.

Note that if you have different environments configured for payroll reporting that the menu item names are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.

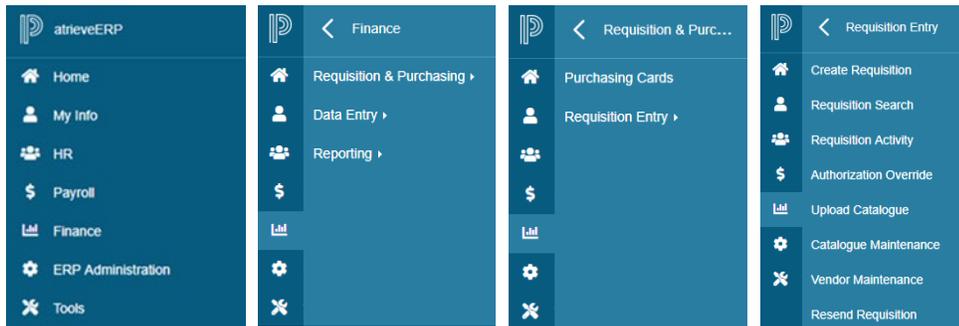


Finance Menu

The Finance menu is where you will find programs and functions that are typically available to Finance staff. The following section includes a breakdown of all menu items available in Finance. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

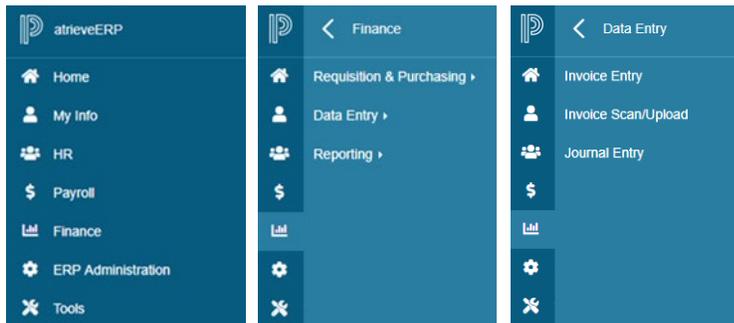
Finance > Requisition & Purchasing

Requisition & Purchasing is where you will go to access Purchasing Cards and Requisition Entry.



Finance > Data Entry

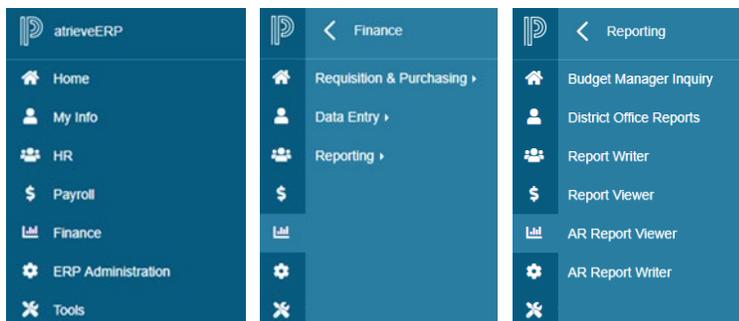
Data Entry is where you will go to access Invoice and Journal Entry



Finance > Reporting

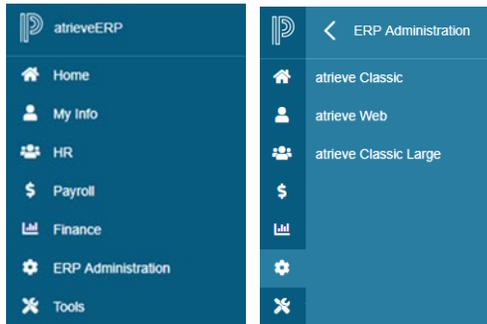
Reporting is where you will go to access the different report viewers and report writers.

Note that if you have different environments configured for finance reporting that the menu item names are customizable. For a complete listing of customizable menu item names refer to the Appendix below in this document.



ERP Administration Menu

The ERP Administration menu is where you will go to access atrieve Classic which includes the HR, Payroll and Finance core programs and functions, and atrieve Web for the new enhanced web version of atrieveFinance. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

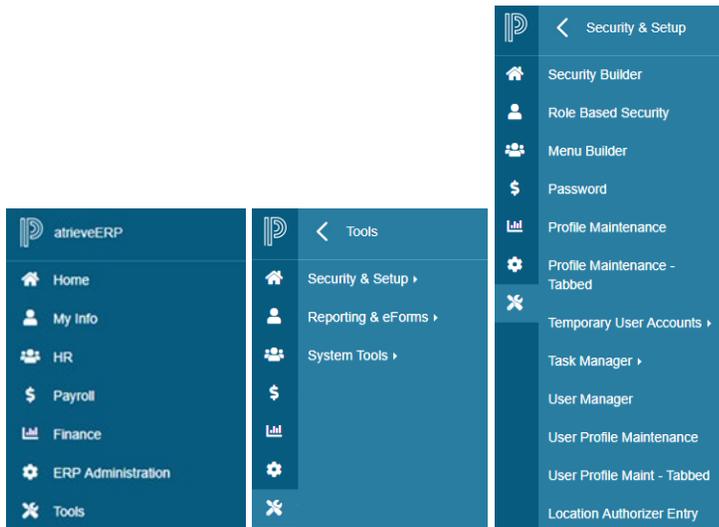


Tools Menu

The Tools menu is where you will find programs and functions that are typically available to **atrieveERP Specialists, Administrators or IT staff**. The following section includes a breakdown of all menu items available in Tools. Your district will control the menu items that display for each user, based on their Role, in Menu Builder.

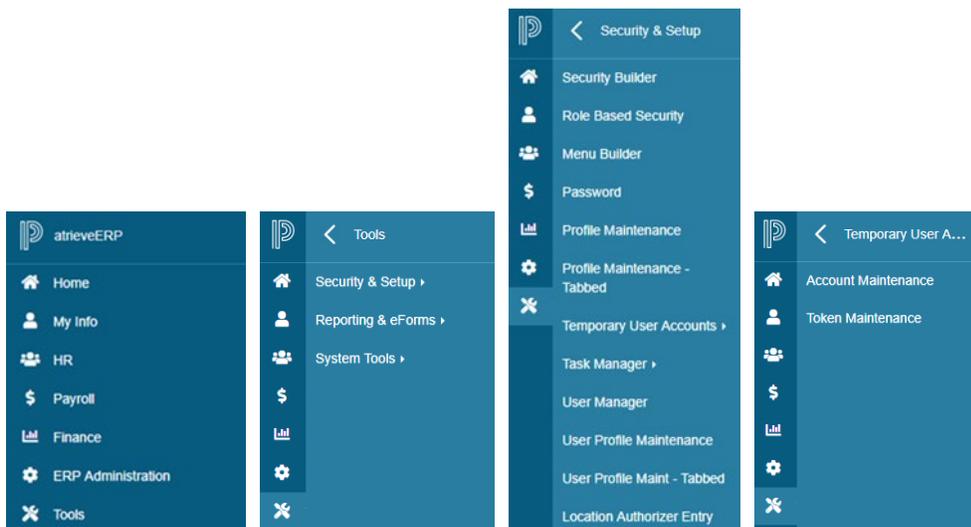
Tools > Security & Setup

Security & Setup is where you will go to access Security Builder, Role Based Security, and Menu Builder as well as User Manager and Profile Maintenance



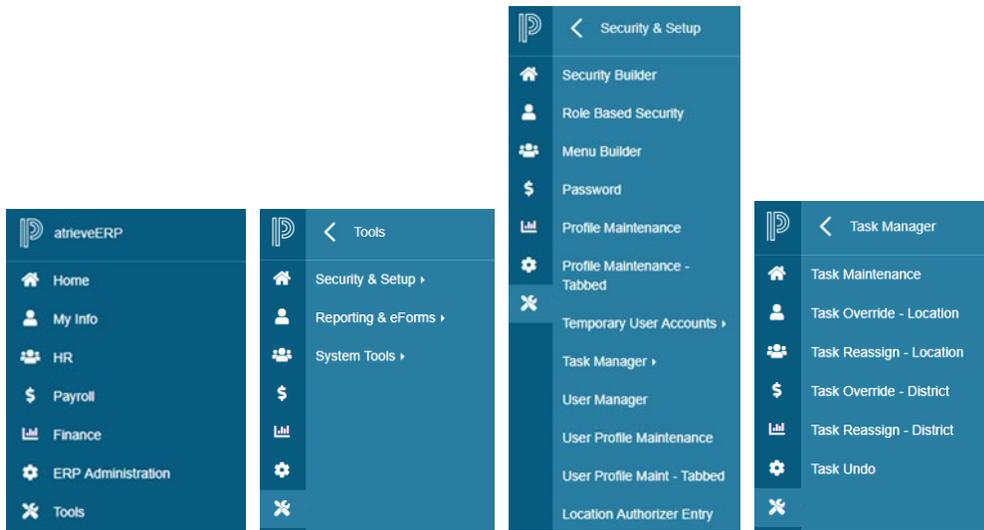
Tools > Security & Setup > Temporary User Accounts

Temporary User Accounts is where you will go to access Account and Token Maintenance



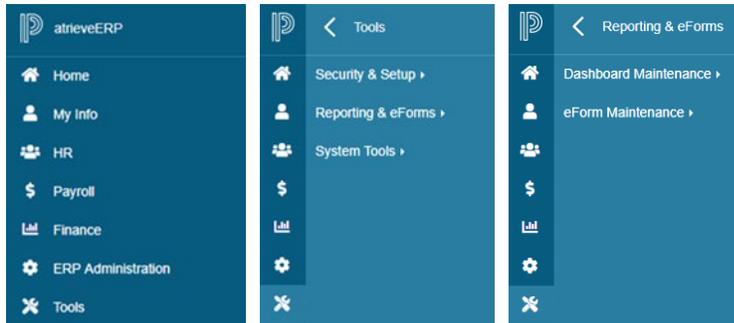
Tools > Security & Setup > Task Manager

Temporary User Accounts is where you will go to access Task Maintenance, and Override and Reassign functions



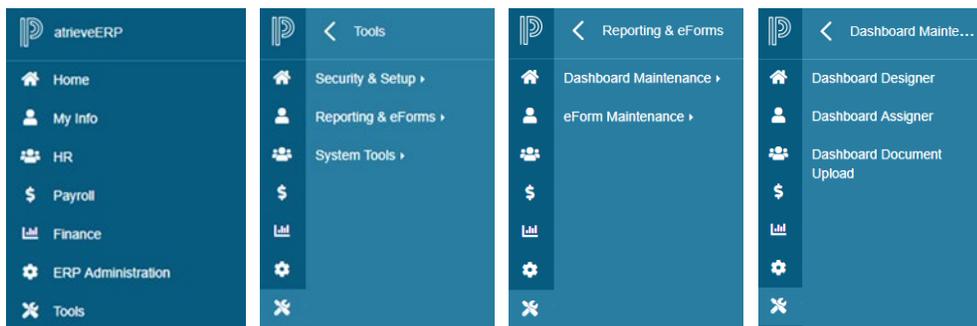
Tools > Security & Setup > Reporting & eForms

Reporting & eForms is where you will go to access Dashboard or eForm Maintenance programs

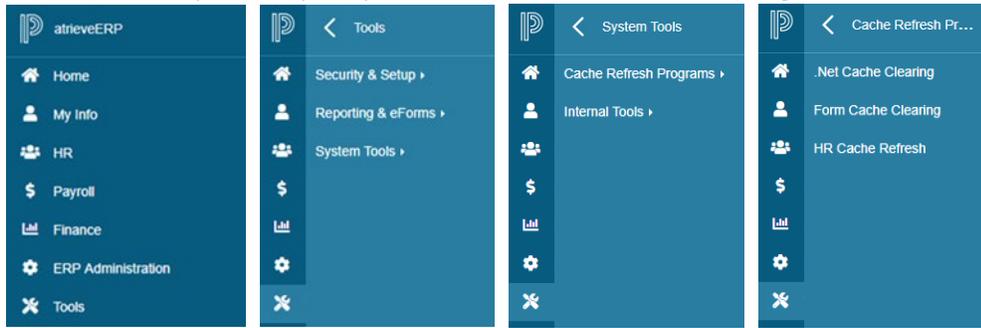


Tools > Security & Setup > Reporting & eForms > Dashboard Maintenance

Dashboard Maintenance is where you will go to access the Dashboard Designer and Assigner

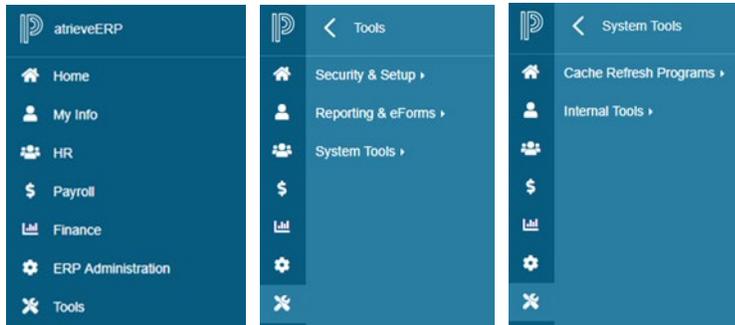


Tools > Security & Setup > System Tools > Cache Refresh Programs



Tools > Security & Setup > System Tools > Internal Tools

Menu Items located in Internal Tools are typically used by internal atrieveERP team members only and **should not be used or added to district menus**, without first consulting with an atrieveERP team member.



Appendix

The following table is a listing of menu items where the menu item display name may be customized.

Important: If you have customized the display name for any of the menu items listed below, when the migration from Security Builder to Menu Builder completes, your custom display names WILL be preserved.

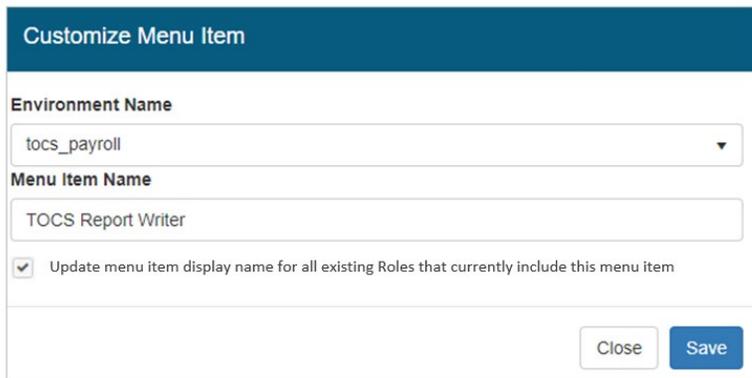
But, if you have created menu groups in Security Builder rather than customizing the menu item display name directly, these groupings will NOT be mapped into the new standardized menu. You will need to update the display name for those menu items so as to ensure that they are intuitive for your end users.

Example 1: In Security Builder you have customized the display name for a Report Writer to 'Warehouse Reports'. When the migration completes the menu item in the new Menu Builder and standardized menu will be 'Warehouse Reports'

Example 2: In Security Builder you have added a Menu group labelled 'Warehouse' and in that group you have the menu item 'Report Writer' (which is the standard unedited name). When the migration completes the menu item in the new Menu Builder and standardized menu will be 'Report Writer'.

To update this menu item, you will do the following:

1. Navigate to Menu Builder
2. Edit a Role that includes the menu item to be updated
3. Locate the menu item in the menu item tree and click the edit icon next to the name
4. On the Customize Menu Item popup enter the new name and click save and the menu item name will be saved for the selected Role only. Or, to have the change apply to all Roles that currently include the menu item, click the option to update all.



List of Customizable Menu Item Display Names

Menu Path	Menu Item Name
My Info > Documents & eForms > eForms	Employee Web Page 01
My Info > Documents & eForms > eForms	Employee Web Page 02
My Info > Documents & eForms > eForms	Employee Web Page 03
My Info > Documents & eForms > eForms	Employee Web Page 04

My Info > Documents & eForms > eForms	Employee Web Page 05
My Info > Documents & eForms > eForms	Employee Web Page 06
My Info > Documents & eForms > eForms	Employee Web Page 07
My Info > Documents & eForms > eForms	Employee Web Page 08
My Info > Documents & eForms > eForms	Employee Web Page 09
My Info > Documents & eForms > eForms	Employee Web Page 10
My Info > Job Postings	Support Staff Postings
My Info > Job Postings	Support Staff Confirmation
My Info > Job Postings	Support Staff Posting 2
My Info > Job Postings	Support Staff Confirmation 2
HR > Manage Staff > Employee Onboarding	Employee Additions 01
HR > Manage Staff > Employee Onboarding	Employee Additions 02
HR > Manage Staff > Employee Onboarding	Employee Additions 03
HR > Manage Staff > Employee Onboarding	Employee Additions 04
HR > Manage Staff > Employee Onboarding	Employee Additions 05
HR > Manage Staff > Employee Onboarding	Employee Additions 06
HR > Manage Staff > Employee Onboarding	Employee Additions 07
HR > Manage Staff > Employee Onboarding	Employee Additions 08
HR > Manage Staff > Employee Onboarding	Employee Additions 09
HR > Manage Staff > Employee Onboarding	Employee Additions 10
HR > Manage Staff > Employee Onboarding	Employee Changes 01
HR > Manage Staff > Employee Onboarding	Employee Changes 02
HR > Manage Staff > Employee Onboarding	Employee Changes 03
HR > Manage Staff > Employee Onboarding	Employee Changes 04
HR > Manage Staff > Employee Onboarding	Employee Changes 05
HR > Manage Staff > Employee Onboarding	Employee Changes 06
HR > Manage Staff > Employee Onboarding	Employee Changes 07
HR > Manage Staff > Employee Onboarding	Employee Changes 08
HR > Manage Staff > Employee Onboarding	Employee Changes 09
HR > Manage Staff > Employee Onboarding	Employee Changes 10
HR > Manage Staff > Internal Job Posting	Support Staff Applications
HR > Manage Staff > Internal Job Posting	Support Staff Applications 2
HR > Documents & eForms > Location eForms	Location Web Page 01
HR > Documents & eForms > Location eForms	Location Web Page 02
HR > Documents & eForms > Location eForms	Location Web Page 03
HR > Documents & eForms > Location eForms	Location Web Page 04
HR > Documents & eForms > Location eForms	Location Web Page 05
HR > Documents & eForms > Location eForms	Location Web Page 06
HR > Documents & eForms > Location eForms	Location Web Page 07
HR > Documents & eForms > Location eForms	Location Web Page 08
HR > Documents & eForms > Location eForms	Location Web Page 09

HR > Documents & eForms > Location eForms	Location Web Page 10
HR > Documents & eForms > District eForms	District Web Page 01
HR > Documents & eForms > District eForms	District Web Page 02
HR > Documents & eForms > District eForms	District Web Page 03
HR > Documents & eForms > District eForms	District Web Page 04
HR > Documents & eForms > District eForms	District Web Page 05
HR > Documents & eForms > District eForms	District Web Page 06
HR > Documents & eForms > District eForms	District Web Page 07
HR > Documents & eForms > District eForms	District Web Page 08
HR > Documents & eForms > District eForms	District Web Page 09
HR > Documents & eForms > District eForms	District Web Page 10
HR > Documents & eForms > eForm DB Maintenance	Final Form 01 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 02 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 03 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 04 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 05 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 06 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 07 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 08 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 09 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 10 Maintenance
HR > Reporting	HR Report Writer
HR > Reporting	HR Report Viewer
Payroll > Reporting	Report Writer
Payroll > Reporting	Report Viewer
Payroll > Reporting	Manager Payroll Info
Finance > Reporting	Report Writer
Finance > Reporting	Report Viewer
Finance > Reporting	AR Report Writer
Finance > Reporting	AR Report Viewer