

Getting to know P atrieveERP

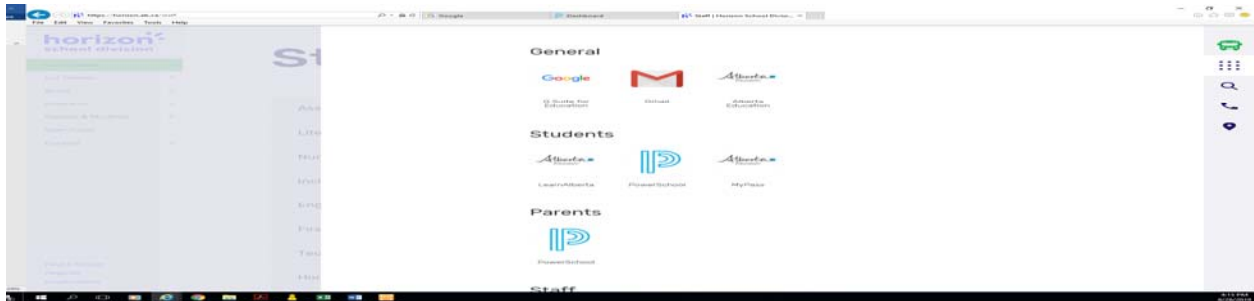
We have been using Atrieve for many years to access our pay vouchers and T4 slips and now we are expanding to use this tool as a way for Staff to enter his/her own absences and for Sub Teachers and Sub Assistants to look for and accept sub jobs electronically.

Let's go review all we can now do in Atrieve..... go to horizon.ab.ca

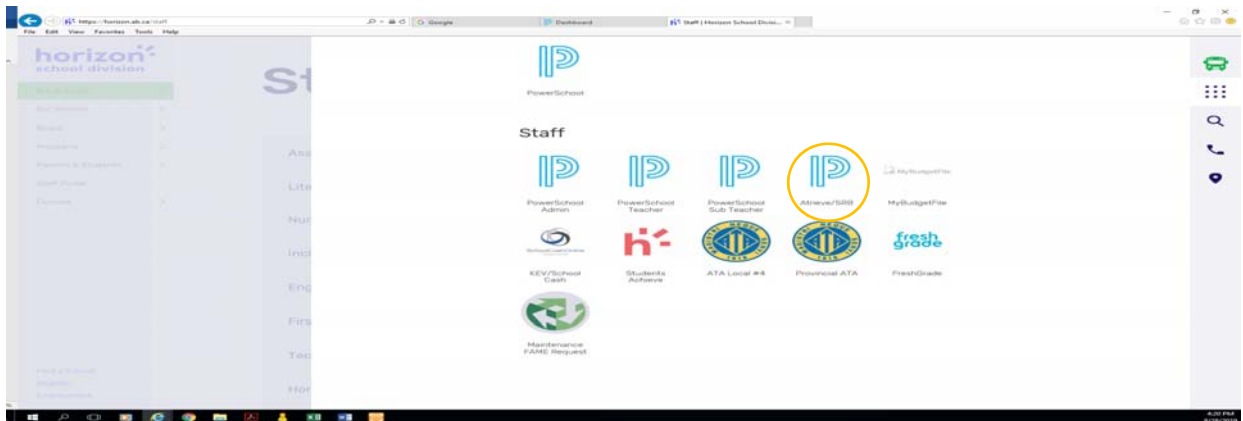
On the right hand side click on the waffle (9 dots)



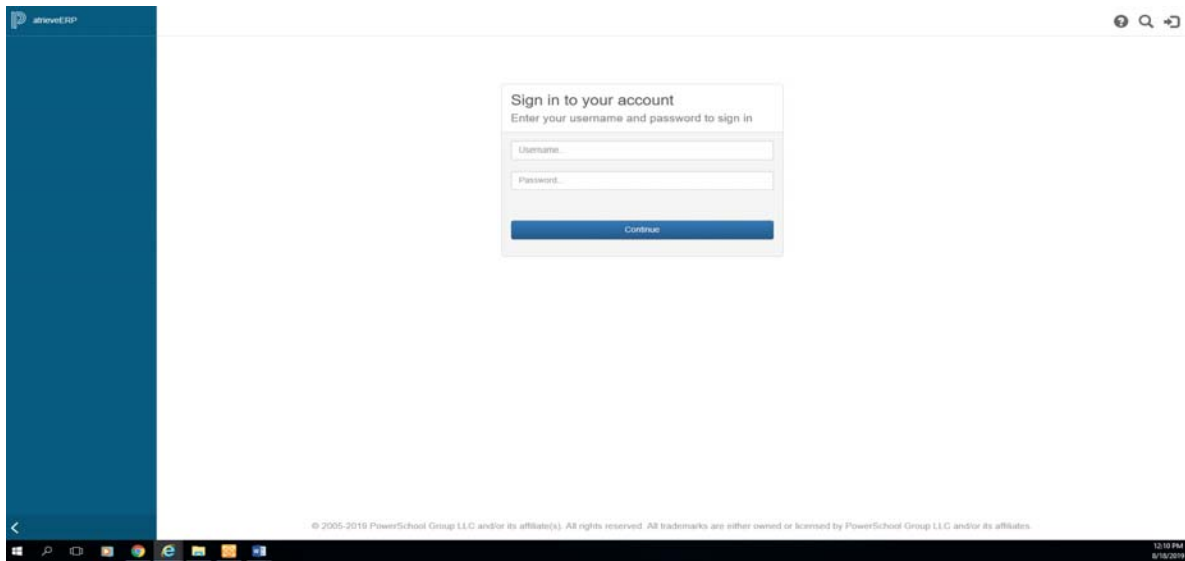
The next page will look like this.



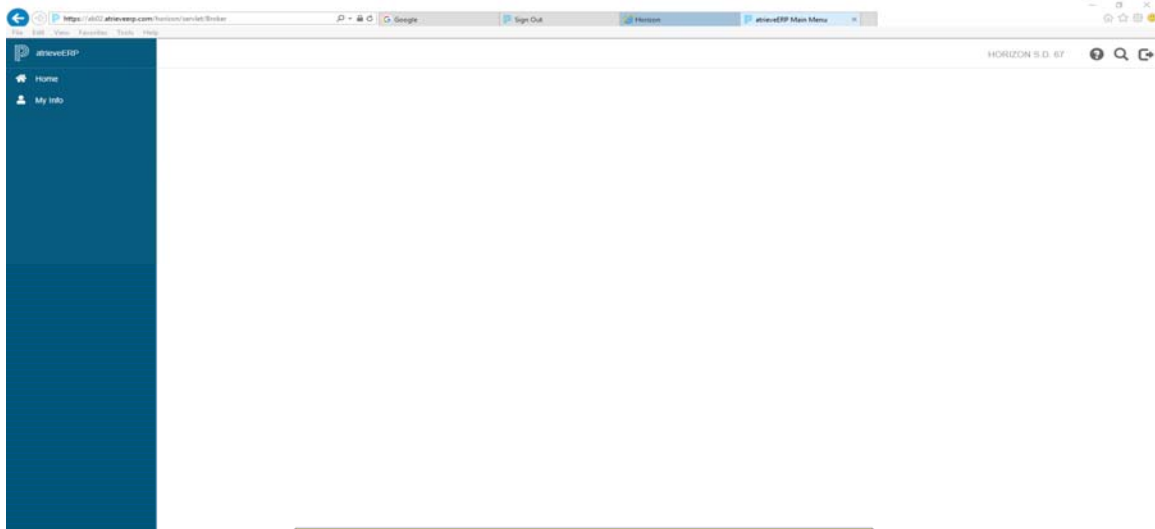
Scroll down until you see P Atrieve/SRB



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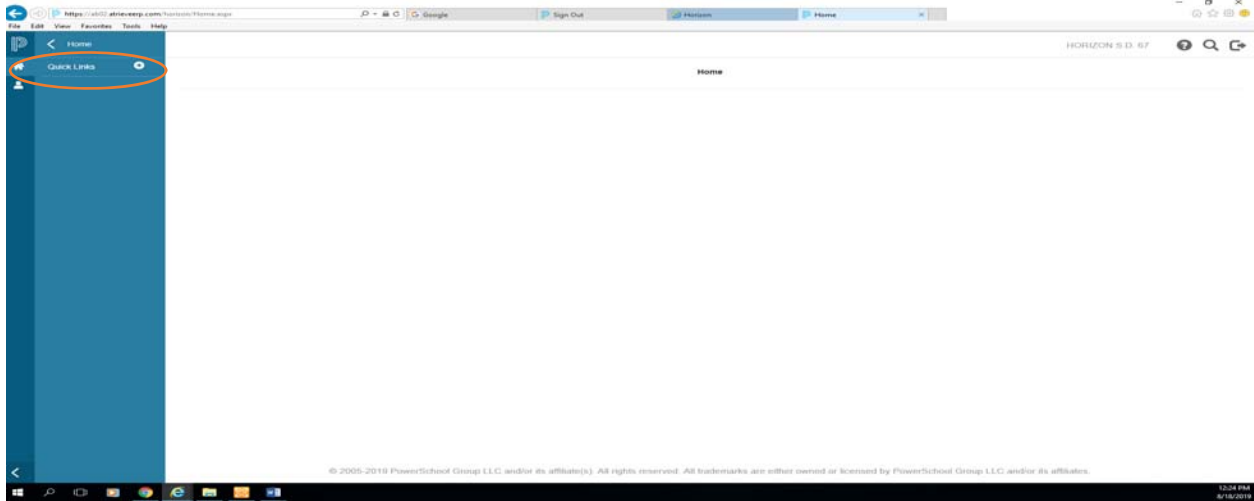


Once you are signed in a new window will open with P atrieveERP, Home, My Info and your name (at the bottom) on the left hand side of the screen (I cropped it out).



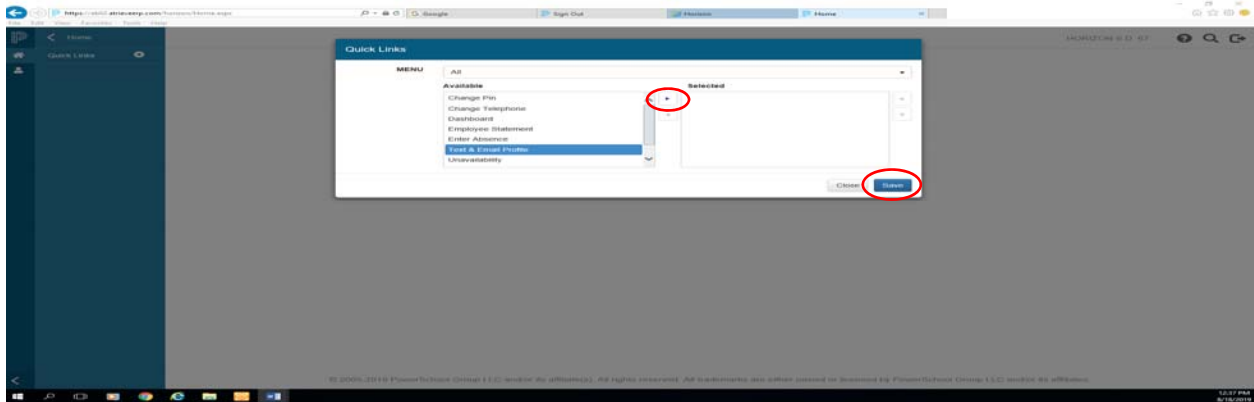
Click on the Home button and a quick links button will appear with a plus sign in a circle.

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Click on the plus sign and a new window will appear.

On the left hand side, under available, you can choose which options you would like to add to your quick links list. Just click on one option at a time and then click the arrow (between the boxes "Available" and "Selected") and choose save. Repeat this action to populate as many quick links as you like.



Your list will populate here.



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While you are here please note that this is where you can:

Change Pin - for the Automated Dispatch System (can also be found by going to My Info, Time and Attendance, Dispatch & Workboard, but creating Quick Links is shorter)

Change Telephone – it will automatically populate your new phone number in our system (can also be found by going to My Info, Phone & Email, Change Telephone, but creating Quick Links is shorter)

Dashboard – this place is all about you, please check to make sure we have your correct email, phone# etc. if not, let either HR or Payroll know. (can also be found by going to My Info, Dashboard)

Employee Statement – your pay voucher and T4 statements are located here (can also be found by going to My Info, Documents & eForms, Employee Statement, but creating Quick Links is shorter)

Enter Absence – Teachers and Support employees are to enter their absences here (can also be found by going to My Info, Time & Attendance, Enter Absence, but creating Quick Links is shorter)

Text & Email Profile – All employees are to complete this action – please tell the system how you would like communication from the system regarding absences and dispatches (further explanation below; can also be found by going to My Info, Phone & Email, Change Telephone, but creating Quick Links is shorter)

Unavailability – If you are a sub and are going to be unavailable please let the system know the dates and times (more instruction below; can also be found by going to My Info, Time & Attendance, Dispatch & Workboard, Unavailability, but creating Quick Links is shorter)

View or Change – This is where subs can see their accepted jobs and teachers and support can see and /or make changes to their absences (can also be found by going to My Info, Time & Attendance, View or Change, but creating Quick Links is shorter)

Workboard – This is where subs see upcoming available job opportunities (more information below; can also be found by going to My Info, Time & Attendance, Dispatch & Workboard, Workboard, but creating Quick Links is shorter)

Now go back to Home and under your quick links choose **Text & Email Profile**

Subs: It is here (next picture) you tell the system how you would like to receive notification when you have been “requested” for a job. You decide, if you want to receive a text message or email when you have been requested. You decide what times of the day would you like to receive notification of being “requested” for a job (the system will not accept a 24 hour option (eg. 0000 to 0000) but you could indicate 23 hours and 59 minutes per day). You tell the system your cell number and your cell phone provider. If you prefer an email then enter your times of day and email address. Finally, choose submit to send yourself a test. You should receive a text or email (dependent on how you set it up) once you have submitted the test.

Please note that teachers and support staff can enter up to 5 “Requested” subs, so, if you sign in to your workboard and there is nothing listed there, someone else has gotten there before you.

Teachers and Support Employees: Here you tell the workboard how you would like to be notified when someone has picked up a job you have posted. Follow the set up procedures indicated for subs.

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Workboard Texting and Email Option Changes

Select texting and email notification options for when you are requested as a replacement. Then click the Submit button to save

Please ensure time is entered in 24 hour format

Text Message: Yes No Time Range - Start: End:

Cell Phone No 1:

Cell Phone 1 Provider:

Cell Phone No 2:

Cell Phone 2 Provider:

Email Message: Yes No Time Range - Start: End:

Email Address 1:

Email Address 2:

Send to Work Email: Yes No

Now go back to Home and under your quick links choose **Work Board**

Work Board: Summary

Here is a summary of the openings you are eligible to apply for.

ID No	Start Date	End Date	Subject(s) and Level(s)	First Day's Schedule Position(s)	Location(s)	Time(s)	Requested
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Subs: It is here that you will see employment opportunities for you to accept; jobs that do not have a requested sub identified, or that a requested sub cannot accept, will show up here. Please note that if you have jobs on your work board, that you are unable to accept, then click refuse option and let the system continue to look for coverage.

Now go back to Home and under your quick links choose **View or Change**

View / Change: Absence and Dispatch Listing

Instructions: Click on the ID Number To View, Close Or Cancel An Absence Or Dispatch.

Absences Date Range: To

ID No	Start Date	End Date	Absence Reason	Replacing Employee(s)	Absence Units
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Dispatches Date Range: To

ID No	Start Date	End Date	Extra Time Type	Absent Employee	Absence Units
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Long Term Leave Requests

ID No	Start Date	End Date	Absence Reason
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Canceled / Denied Leave Requests - No Absence record

ID No	Start Date	End Date	Absence Reason
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Subs: It is here you will see a list of the jobs you have accepted. Please note that if you have received a phone call regarding a job and you do not see the job posted in your list it means one of the following: the job has not been entered, the absence is not approved, the employee has not entered the absence or the employee entered the absence and then started calling out to people for coverage and the system found someone to cover the job (this could lead to a double booking) or the employee no longer requires a sub; you need to contact the person that you spoke with and question why it is not in the system.

Teachers and Support Employees: Please note it is here you will see your absences, dispatches (if you also sub), long term leave requests and cancelled/ denied leave requests

Now go back to Home and under your quick links choose **Unavailability**

Unavailability: Add, Change and View History




 Enter your unavailability information then click Next.
 

Click on the calendar icon to select your dates from a pop-up calendar.

Choose the reason you are unavailable:

-----Choose A Reason----- v

Enter the date(s) you will be unavailable:

23-Oct-2018  To 23-Oct-2018 

Note: The weekly schedule you enter is assumed to repeat for each week within the date range.
Please enter the time in 24 hour format.

Week Day	Unavailable	Start Time	To	End Time
Monday	<input type="checkbox"/>	01:00	To	23:59
Tuesday	<input type="checkbox"/>	01:00	To	23:59
Wednesday	<input type="checkbox"/>	01:00	To	23:59
Thursday	<input type="checkbox"/>	01:00	To	23:59
Friday	<input type="checkbox"/>	01:00	To	23:59
Saturday	<input type="checkbox"/>	01:00	To	23:59
Sunday	<input type="checkbox"/>	01:00	To	23:59

Unavailability History For The Last 12 Months

Click on a start date below to delete an unavailability record.

Start Date	End Date	Reason	Mon	Tues	Wed	Thur	Fri	Sat	Sun

Subs and employees who also sub: Should you ever be temporarily unavailable or have a part time job that conflicts with subbing a whole school day, then it is here that you tell the system the times and days you are unavailable. Please note that even though we tell the system we are unavailable, if a school should print of an "all subs list" your name and phone number will still appear and in desperate moments you may receive a call from someone because, you are a sub of Horizon.

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Now go back to Home and under your quick links choose **Enter Absence**; please note that **this option is for teacher and support employees only**. If you are a sub and try to enter an absence you will be notified that this option is not available to you.



Now go back to Home and under your quick links choose **Dashboard**

Dashboard opens to My Employee Dashboard and is all about you:

- Name, address, phone #
- A list of the assignments you have had
- Certificates
- Upcoming evaluations
- Absences

As well, you will find links to some information we think may be important to you.

If your contact information is incorrect, please contact the HR Department and provide updated information.

The number beside your name is your employee number. The number below your contact information is your pin # for the ADS – initially these are both the same; please change your pin.

Now go back to Home and under your quick links choose **Change Pin**.



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Now go back to Home and under your quick links choose **Change Telephone**.



All Employees: It is here you change your telephone number and it will populate back to our system so we will always have your correct phone #.

Subs: It is also here, that you can tell the Automated Dispatch System (ADS) when or if you want to receive calls regarding same day dispatches and/ or cancellations. **It is very important that you listen carefully** to what the ADS is asking of you in the way of Employee or PIN #s and responses to the questions. The handy little pamphlet I sent out to you along with this guide is an important read and it has a place to record your employee # and PIN – keep it handy. It also indicates the reason response if you deny the job, cause the ADS will ask for that too.

The ADS is very persistent and when you think you can just not answer the questions and hang up, you will receive another call back...yep....you will and repeatedly until it has received the answers or you unplug or turn off your phone.

So, that being said, in this change telephone area you will notice that **you have options regarding the ADS call outs. You can choose:**

No, don't opt out – which means you are willing to receive calls morning and evening.

Opt out of all dispatches – which means you will not receive any calls from the ADS and will instead check your workboard often.

Opt out of same day dispatches – which means you will not receive calls at 6:00 a.m. in the morning

Or Opt out of future dispatches – which means you do not want to receive the 5:00 p.m. calls for future absences

