

Getting to know atrieveERP 2022

Welcome to Team Horizon!

I would like to introduce you to atrieveERP. This is where all employees will access his/her pay vouchers and T4 slips. This is also where employees, with an assignment, will enter their own absences and will be able to see their absences from year to year.

As well, Sub Teachers and Sub Support Staff will use the Workboard to accept jobs that have been posted to the Workboard and can see the jobs they have accepted either through the Automated Dispatch System (ADS) or from the Workboard.

To get familiar with atrieveERP 2022 go to horizon.ab.ca

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



Select the blue P with Atrieve/SRB printed under it.



You are now at the sign in page (below). Use your computer login information to sign in.

Welcome to atrieveERP!

Username

Password

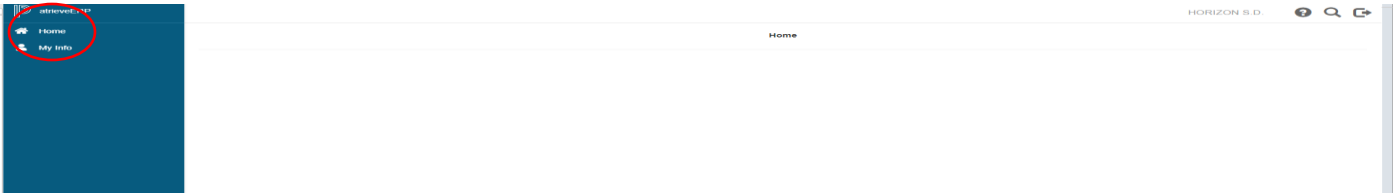
Remember My Login

Login

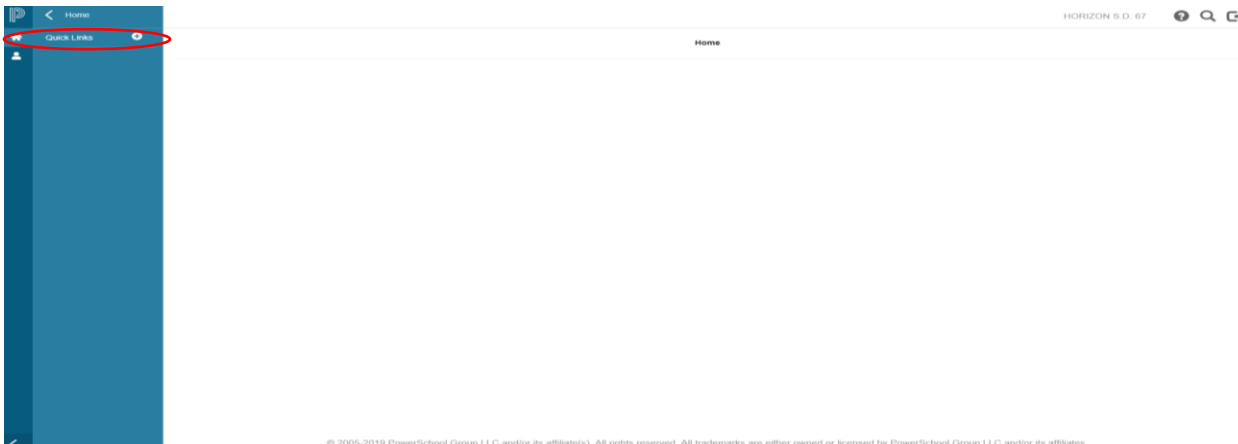


Getting to know atrieveERP 2022

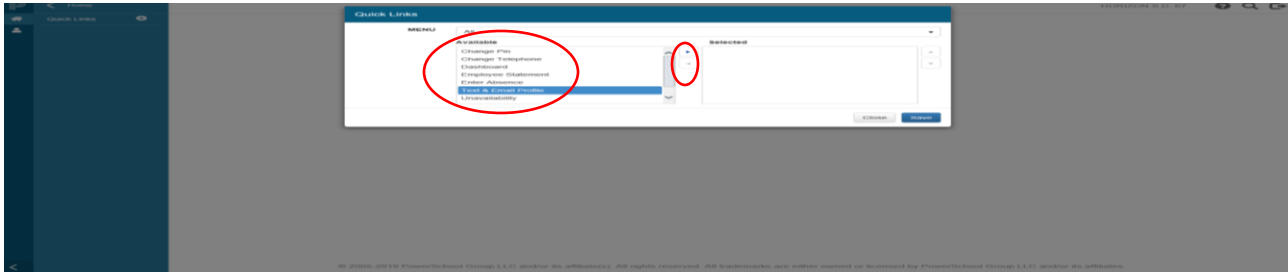
You are now in atrieveERP and will see Home and My Info on the left-hand side of the page.



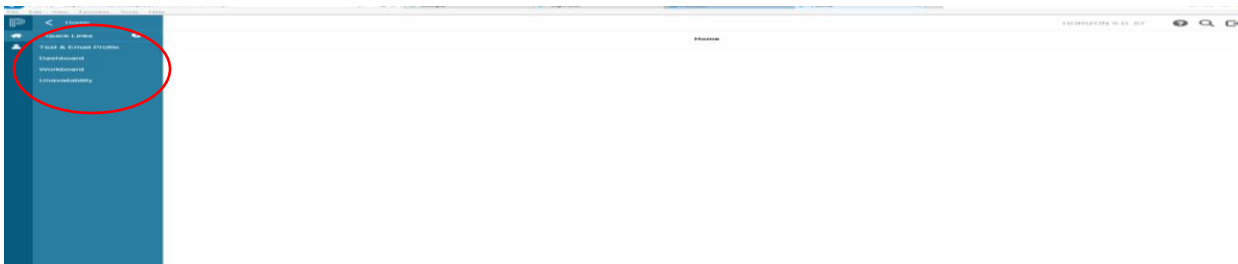
Click on the Home button and a quick links button will appear with a plus sign in a circle.



Click on the plus sign and a new window will appear. This window provides you with options that can be placed onto your quick links for easy access.



Just click on one option at a time and then click the arrow (between the boxes “Available” and “Selected”) and when you have placed all of the available options you would like then choose to save, this action can be reversed at any time. Picture of what it will look like, below.



Getting to know atrieveERP 2022

While you are here please note that these quick links allow you to:

Change your ADS 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 your 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)

See your 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)

See your 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 an 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)

Set up your 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)

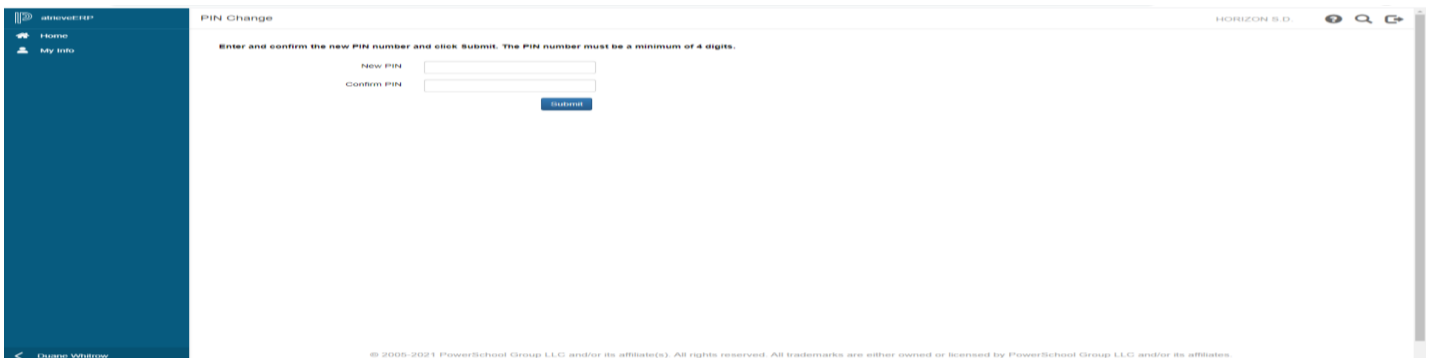
Indicate your Unavailability – If you are a sub and are going to be unavailable please let the system know the dates and times (more instruction below; can also be found by going to My Info, Time & Attendance, Dispatch & Workboard, Unavailability, but creating Quick Links is shorter)

Opt to 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)

See the 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)

Let's go through each one.

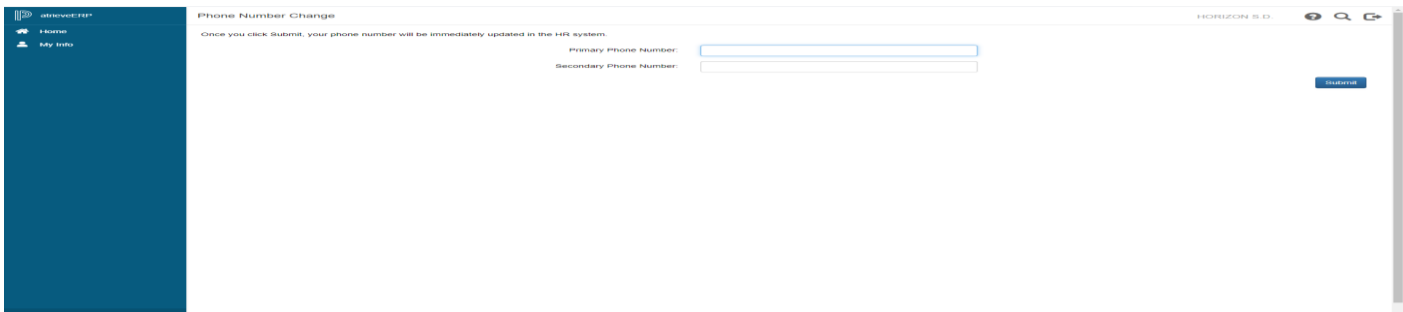
Go back to Home and under your quick links choose **Change Pin**.



The screenshot shows the 'PIN Change' page in the atrieveERP system. The page title is 'PIN Change' and it includes a sub-header: 'Enter and confirm the new PIN number and click Submit. The PIN number must be a minimum of 4 digits.' Below this, there are two input fields: 'New PIN' and 'Confirm PIN'. A blue 'Submit' button is located below the 'Confirm PIN' field. The left sidebar of the application is visible, showing navigation options like 'Home' and 'My Info'. The footer of the page contains the copyright information: '© 2005-2021 PowerSchool Group LLC and/or its affiliate(s). All rights reserved. All trademarks are either owned or licensed by PowerSchool Group LLC and/or its affiliates.'

Getting to know atrieveERP 2022

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



The screenshot shows a web browser window displaying the 'Phone Number Change' form. The browser's address bar shows 'atriveERP'. The page title is 'Phone Number Change'. A warning message reads: 'Once you click Submit, your phone number will be immediately updated in the HR system.' Below this, there are two input fields: 'Primary Phone Number' and 'Secondary Phone Number'. A 'Submit' button is located at the bottom right of the form area. The browser's address bar also shows 'HORIZON 5.13' and some navigation icons.

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

Getting to know atrieveERP 2022

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

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

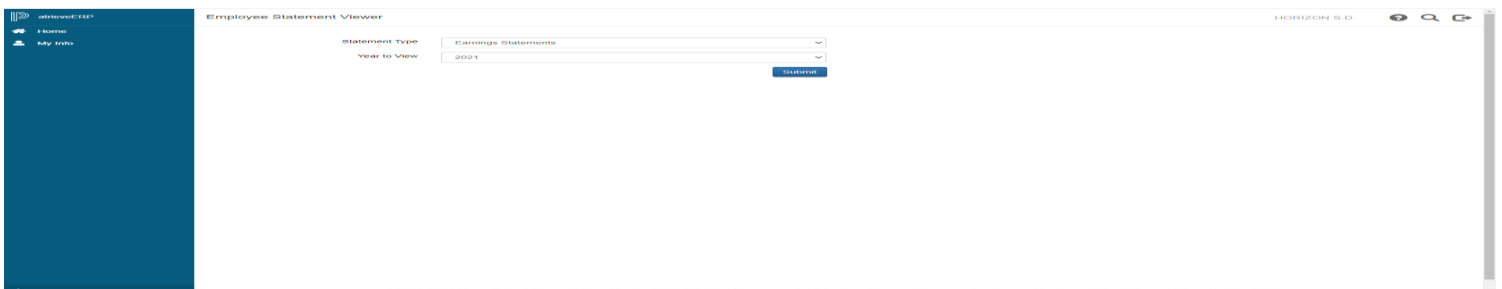
- Name, address, phone #
- A list of the assignments both current and those you have had
- Certificates
- Upcoming evaluations
- Absences

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.

Go back to Home and under your quick links choose **Employee Statement**



Here you find your monthly earning statements and your yearly T4 statements. Should you have questions about pay vouchers or T4 slips contact the Payroll Department.

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.

Getting to know atrieveERP 2022

The screenshot shows the 'Absence Entry: Absence Information' page in the atrieveERP system. On the left is a dark blue sidebar with 'Home' and 'My Info' links. The main content area has a white background with a blue header. The form includes a dropdown menu for 'Absence Reason' with the text 'Choose A Reason', radio buttons for 'Absence Type' (selected: 'single day', unselected: 'range of days'), and a date field for 'Absence Date' set to '14-Jul-2021'. A 'Print' button is located in the top right corner. At the bottom, there is a small copyright notice: '© 2005-2021 PowerSchool Group LLC and/or its affiliate(s). All rights reserved. All trademarks are either owned or licensed by PowerSchool Group LLC and/or its affiliates.'

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

The screenshot shows the 'Text & Email Option Changes' page. It is divided into two sections: 'Text' and 'Email'. The 'Text' section includes a 'Text Message' dropdown set to 'Yes', 'Start Time' and 'End Time' fields with '(24 Hour Format HH:MM)' instructions, and two 'Cell Phone' fields with provider dropdown menus. The 'Email' section includes an 'Email Message' dropdown set to 'Yes', 'Start Time' and 'End Time' fields with '(24 Hour Format HH:MM)' instructions, two 'Email Address' fields, and a 'Send to Work Email' dropdown set to 'Yes'. A 'Submit & Send Test' button is at the bottom right. The same copyright notice as the previous screenshot is at the bottom.

Subs: It is here (picture above) 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.

Getting to know atrieveERP 2022

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

Enter the date(s) you will be unavailable:
14-Jul-2021 To 14-Jul-2021

Note:
The weekly schedule you enter is assessed by request 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 | Tue | 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.

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, Click Or Cancel An Absence Or Dispatch.

Absences
Date Range: 14-Jun-2021 To 15-Jul-2022
Refresh Absences

| ID No. | Start Date | End Date | Absence Reason | Replacing Employee(s) | Absence Units |
|--------|------------|----------|----------------|-----------------------|---------------|
|--------|------------|----------|----------------|-----------------------|---------------|

Dispatches
Date Range: 14-Jun-2021 To 15-Jul-2022
Refresh Dispatches

| ID No. | Start Date | End Date | Extra Time Type | Absent Employee | Absence Units |
|--------|------------|----------|-----------------|-----------------|---------------|
|--------|------------|----------|-----------------|-----------------|---------------|

Long Term Leave Requests

| ID No. | Start Date | End Date | Absence Reason |
|--------|------------|----------|----------------|
|--------|------------|----------|----------------|

Cancelled / Denied Leave Requests - No Absence record

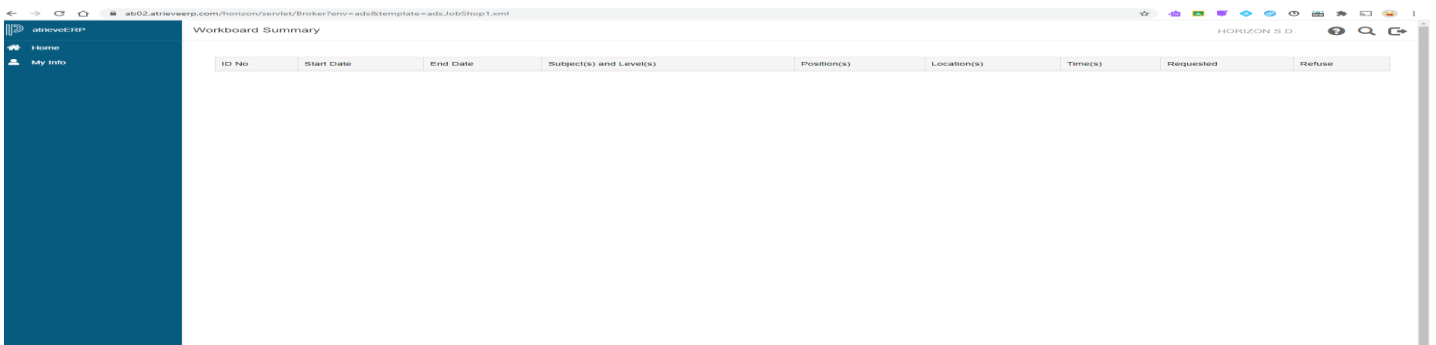
| ID No. | Start Date | End Date | Absence Reason |
|--------|------------|----------|----------------|
|--------|------------|----------|----------------|

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

Getting to know atrieveERP 2022

Finally, go back to home and choose **Work Board**



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.

I hope this information was useful in getting you familiar with atrieveERP.

If you have any questions, feel free to contact the HR Department.

Have a great day!