

Kiosk Enhancement Release ME2-2021

Technical Document Process

CALENDAR ENHANCEMENTS

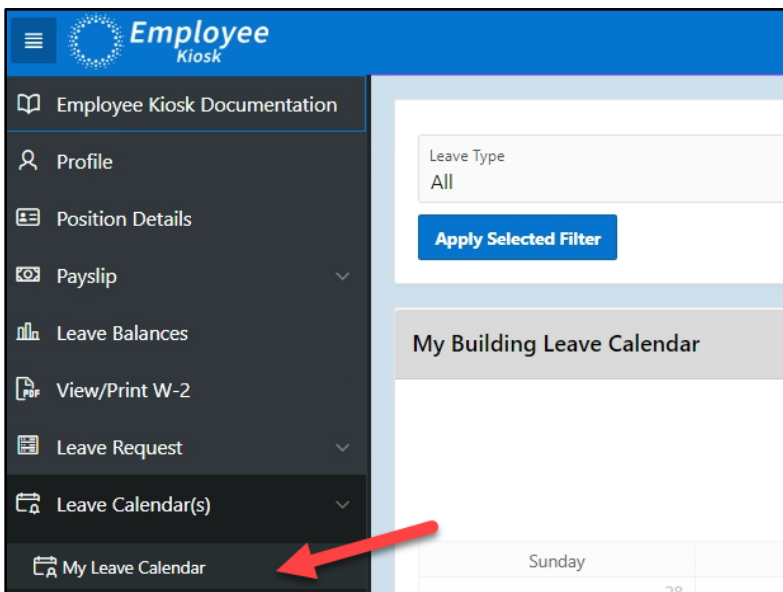
1. Calendar Date Range Option Added To Kiosk Calendars ME2-9

Description:

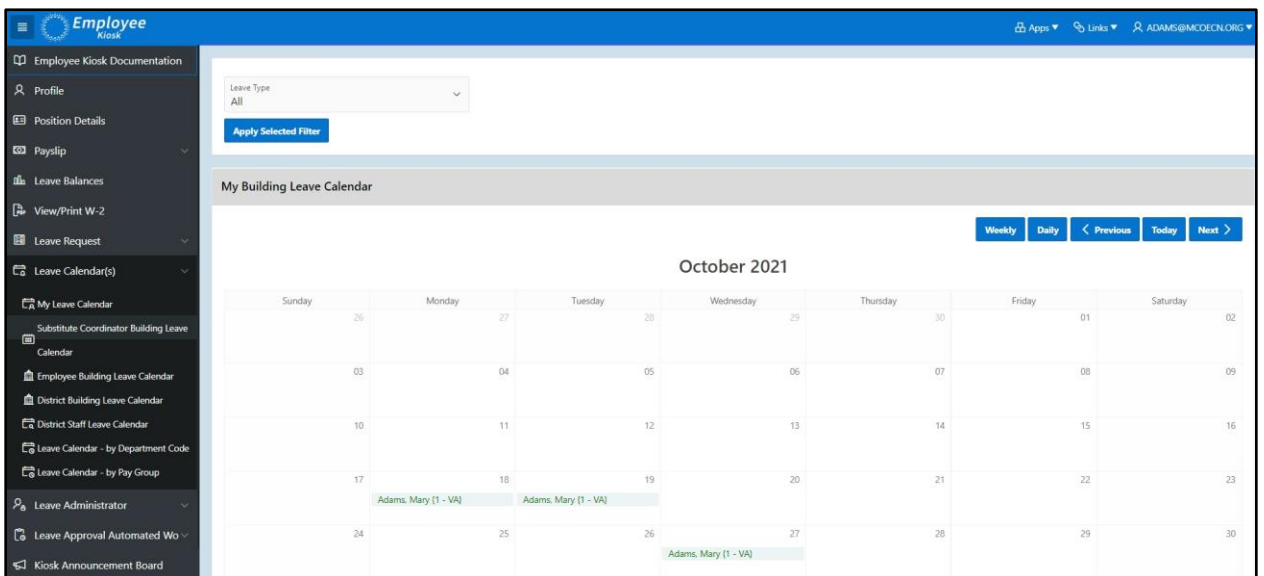
- Filters added to Calendars for start/end date at bottom of the screen
- Alphanumeric sorting is enabled

Location of the enhancement:

- Click on My Leave Calendar

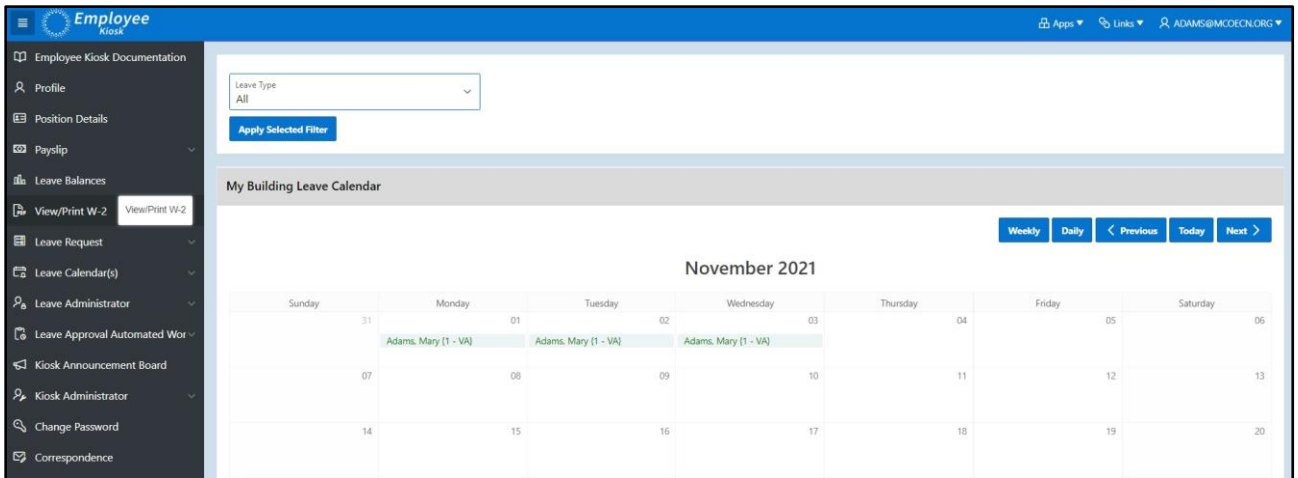


- Add Calendar Date Range Option (Dynamic HTML) To Kiosk Calendars
- Current Calendar:

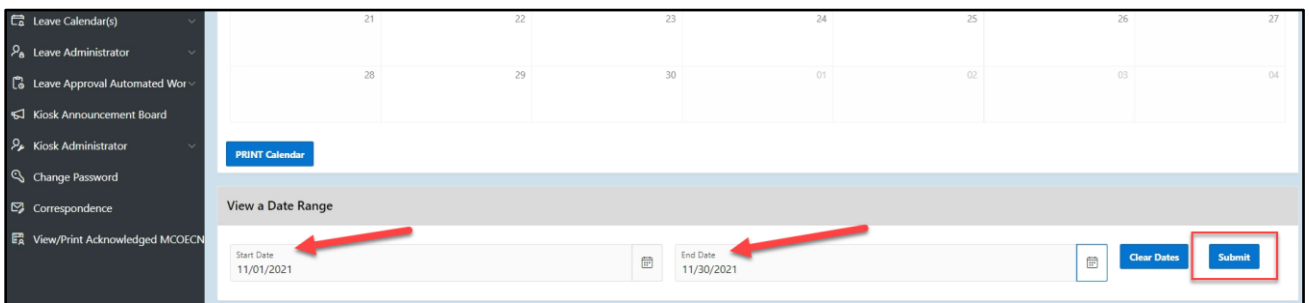


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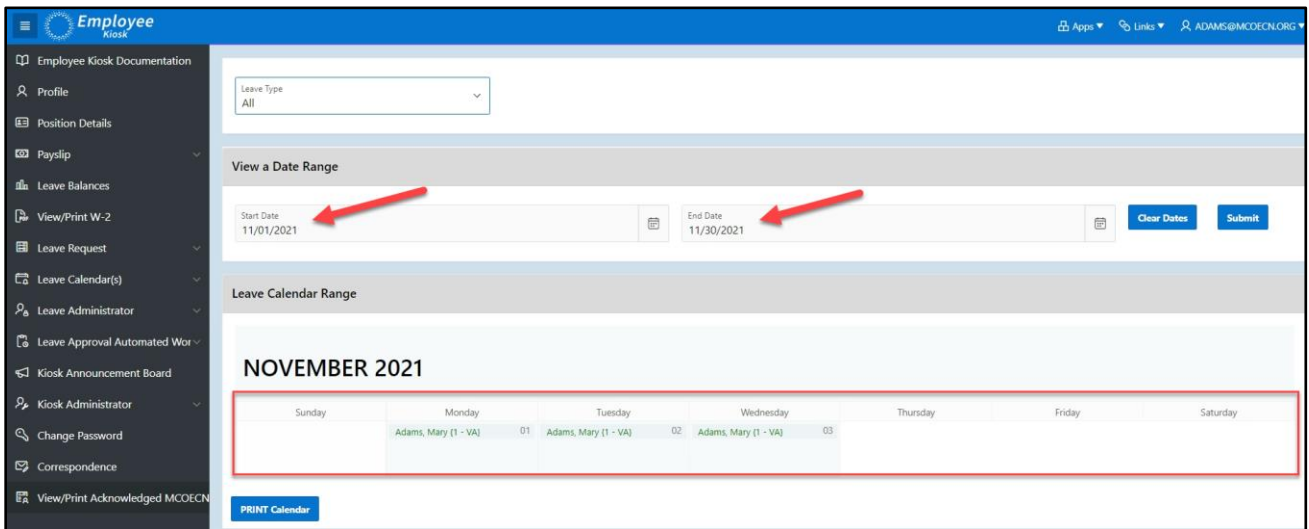
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- Enter the dates desired
- Click on Submit button

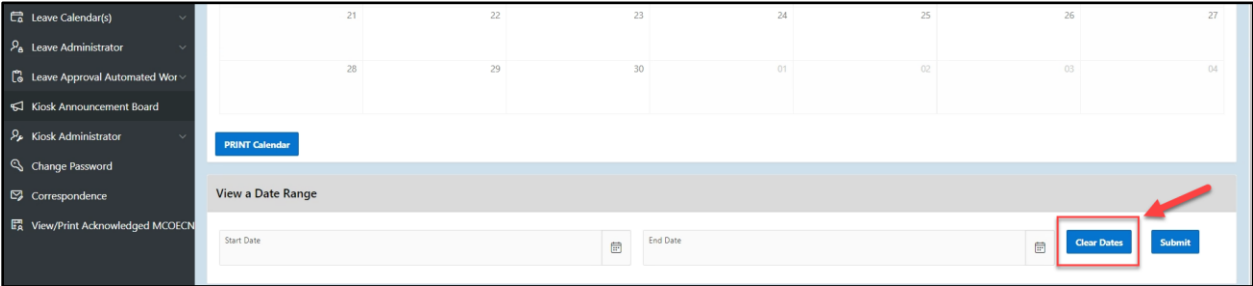


- Results of the filter:



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➤ Click on Clear Dates to reset the filter



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2. Filter by leave type will be added to all leave calendars ME2-18

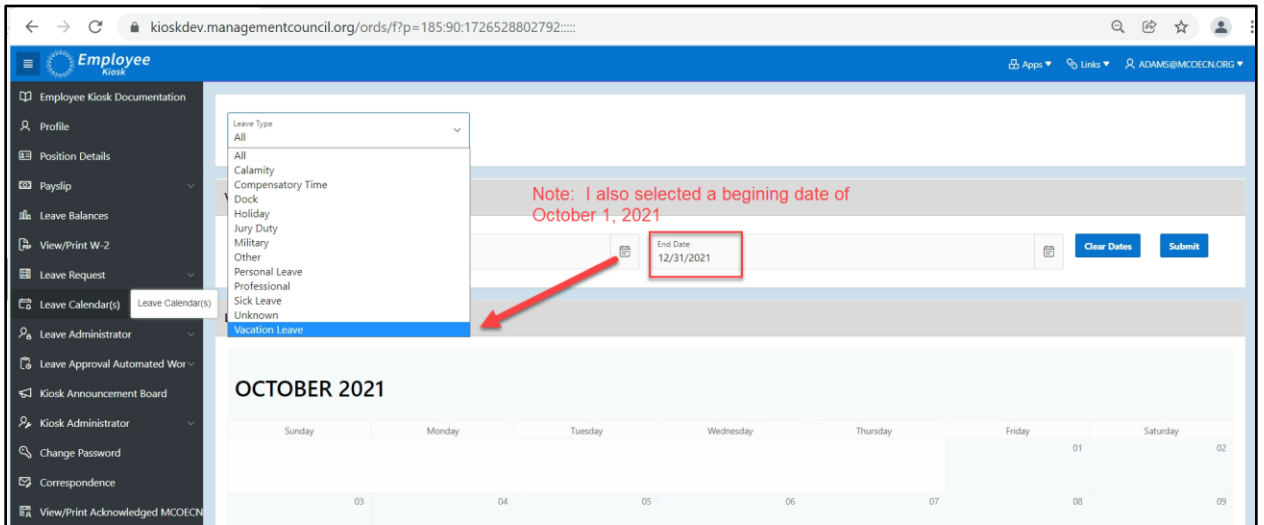
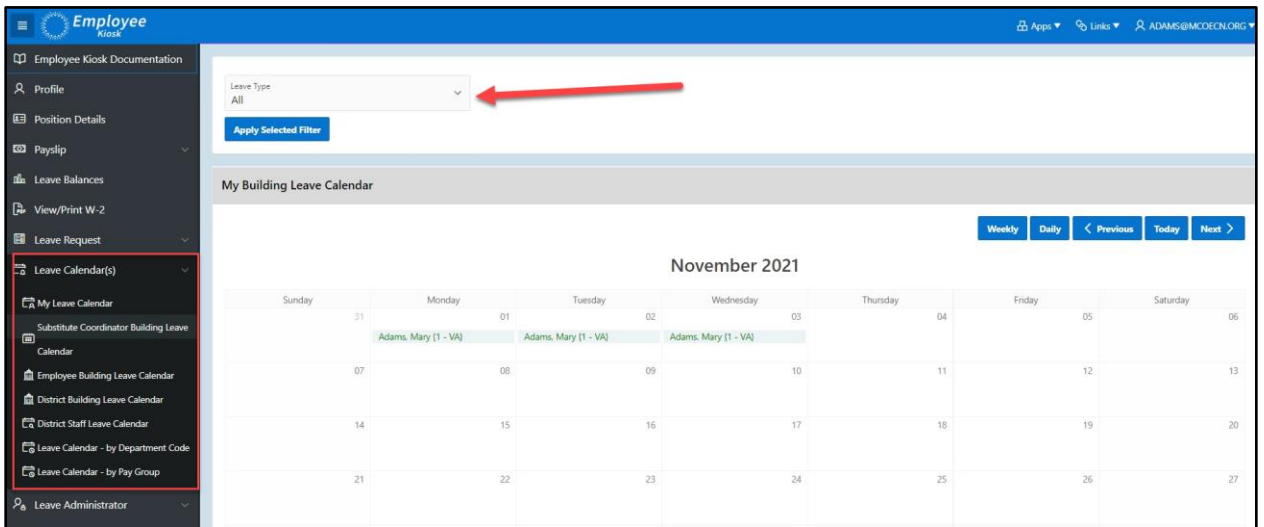
Description:

- Leave type filter added to the Filter Request screen for all calendars

Location of the enhancement:

- Click on My Calendar or as an admin click on Leave Calendars

The calendar will filter by the leave type you have selected and/or including the dates selected in the filters



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- Select the leave type to apply the filter
- Click on submit
- And based on the dates criteria the results will show on your screen:

Vacation Leave

View a Date Range

Start Date
10/01/2021

End Date
12/31/2021

Clear Dates

Submit

Leave Calendar Range

OCTOBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	Adams, Mary (1 - VA)	Adams, Mary (1 - VA)	19	20	21	22
24	25	26	Adams, Mary (1 - VA)	27	28	29
31						

NOVEMBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Adams, Mary (1 - VA)	01 Adams, Mary (1 - VA)	02 Adams, Mary (1 - VA)	03		

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LEAVE REQUEST ENHANCEMENTS

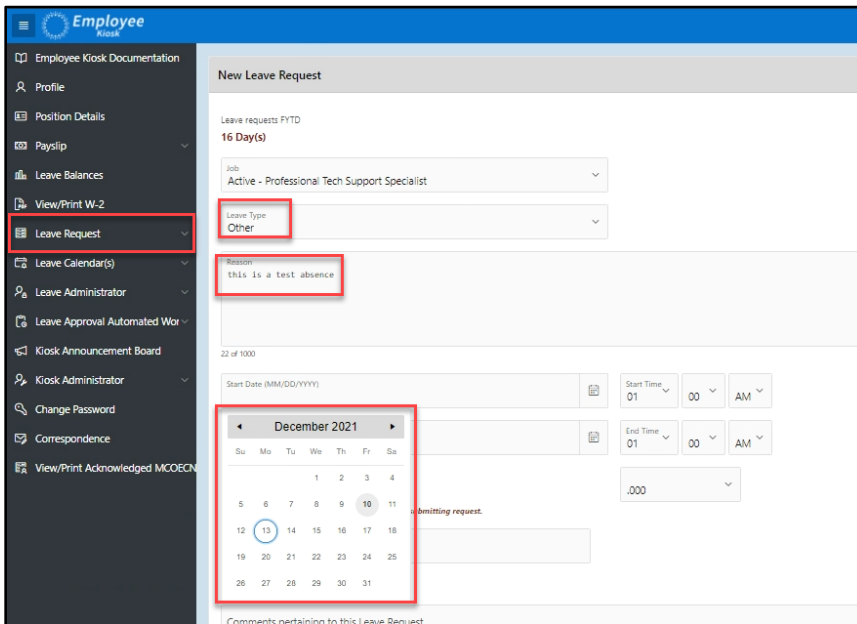
3. Leave Request date button default ME2-10

Description:

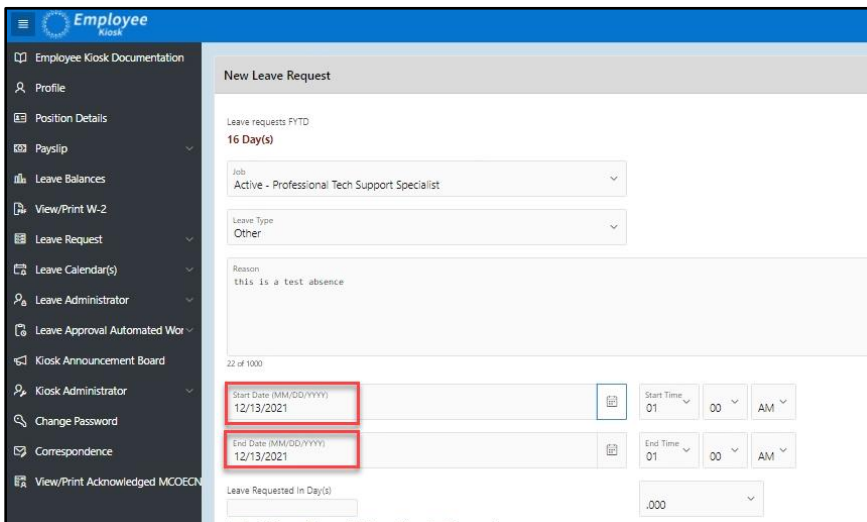
- End date is defaulted to the same date as the start date

Location of the enhancement:

- Click on Leave Request
- Click on new leave request
- enter leave type
- enter reason
- enter/select start date



- Once the date is selected the 'end date' is defaulted as well to the same day



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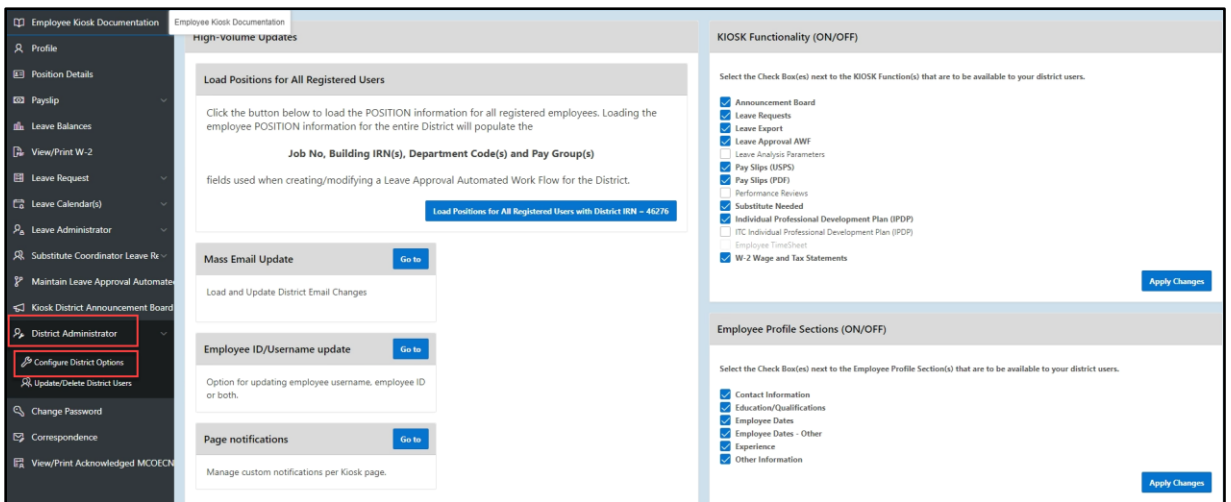
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4. District configuration % of staff leave threshold updated to accept threshold by building ME2-11

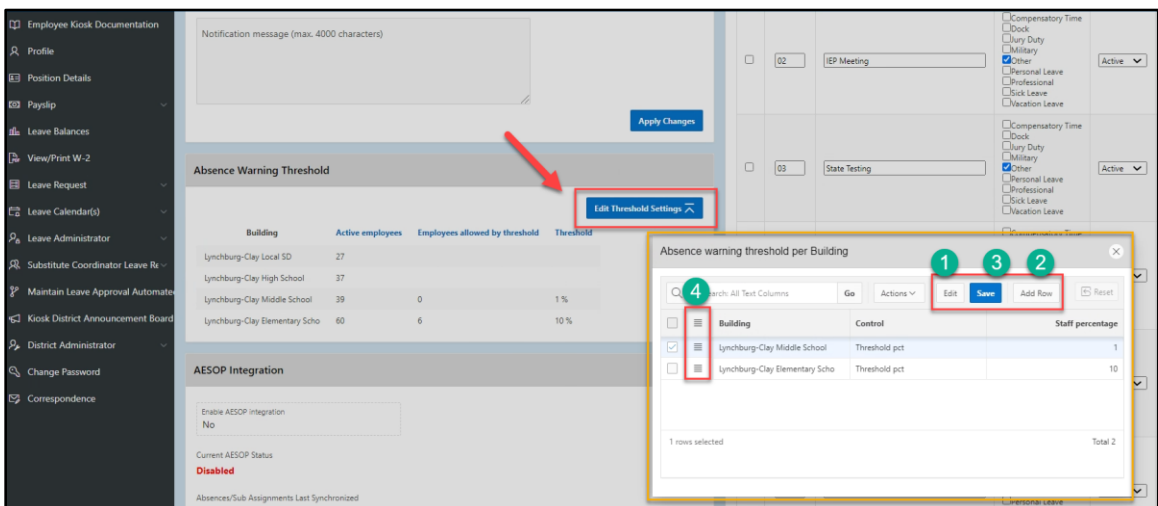
- Each building can be configured to have a % threshold for leave requests
- Once the percentage of the amount of active employees threshold is set up by building, then the Create Leave request option will have the control in place.
- The supervisor approval page will now show the Threshold Exceeded message once the threshold has been crossed.

Location of the enhancement:

- Click on District Administrator
- Click on District Options
- Scroll to the Absence Warning Threshold Section

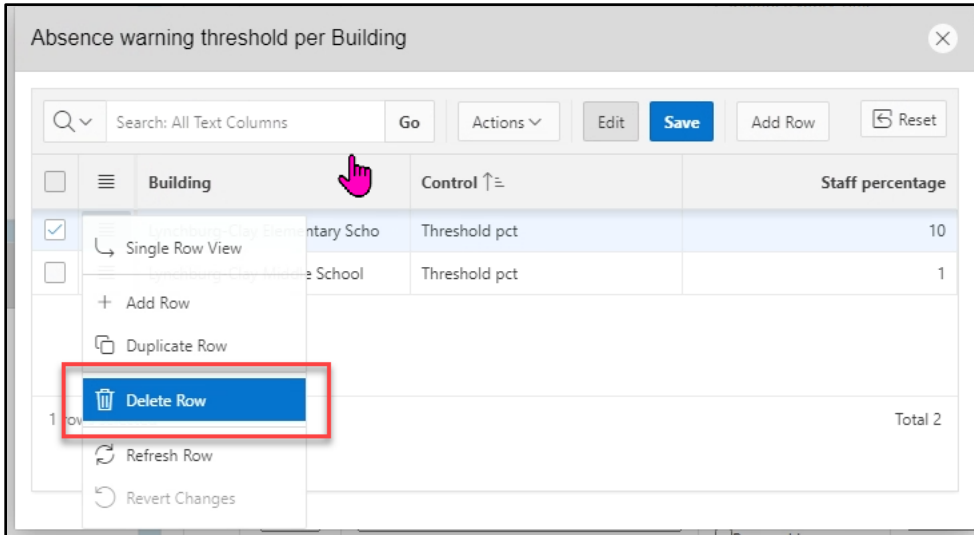


- To configure each building, the District Administrator will need to perform the 4 steps below.
- The edit button (1) is used to update the staff percentage once you click on the staff percentage for 1 building
- The add button (2) is used to add a building for which you want to include a percentage threshold. You will need to add a row, select a building, and enter the threshold percentage
- The save button (3) is used to save the information that was just entered for that building



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- The contextual menu (4) contains the delete



- This is what the message will look like before the Supervisor approves the leave.



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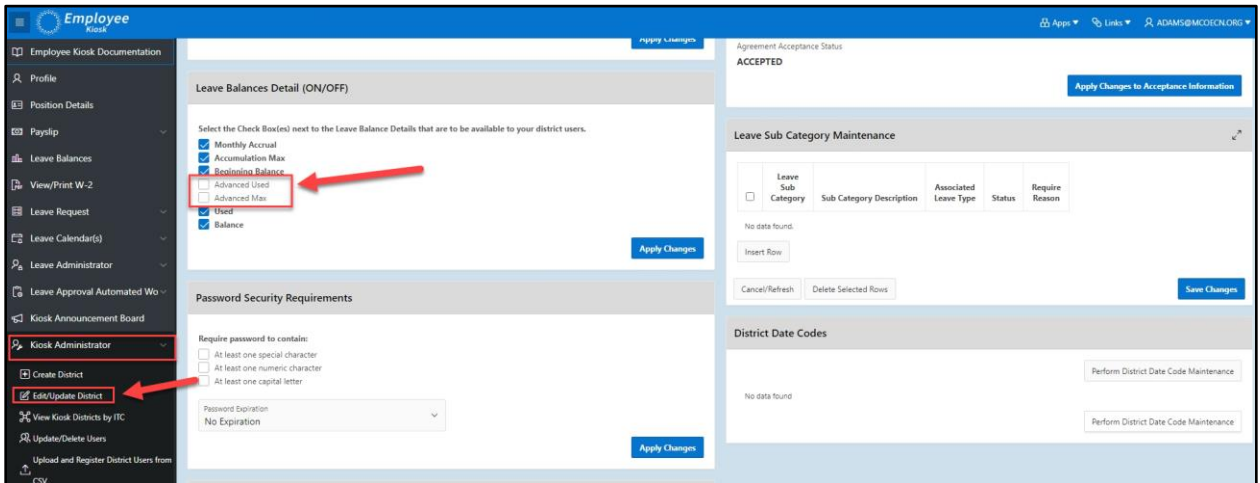
5. Advanced Used and Advanced Max fields to the leave balances in the Kiosk ME2-12

Description:

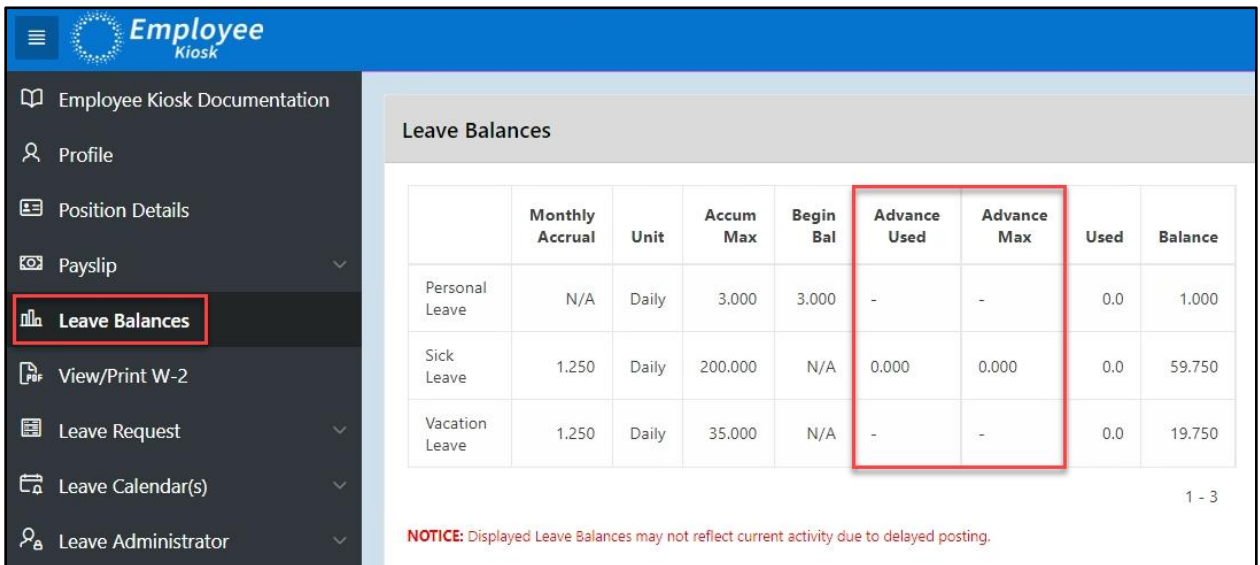
- These are fields that are in the USPS software. If the balance is 0 or null, it will display 0 on the screen.
- They will only be displayed on the Leave Balances screen if they are configured to do so.

Location of the enhancement:

- To Configure the Advanced Used & Advanced Max display fields
- Click on Kiosk Administrator
- Click on Edit/Update District
- Scroll to the Leave Balances Section



- To see the Advanced Used & Advanced Max amounts
- Click on Leave Balances



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6. Modifying Leave Requests for a Calamity Day ME2-13

Note: This feature will be available for “KIOSK only” districts

Description:

- Only can cancel days that are unprocessed
- If the day has been exported; then the employee needs to create a negative request to get the day back.

Location of the enhancement:

- Click on Leave Admin
- Click on View/Print District Requests dropdown
- Click on View/Print District Cancelled & Rejected Request(s)

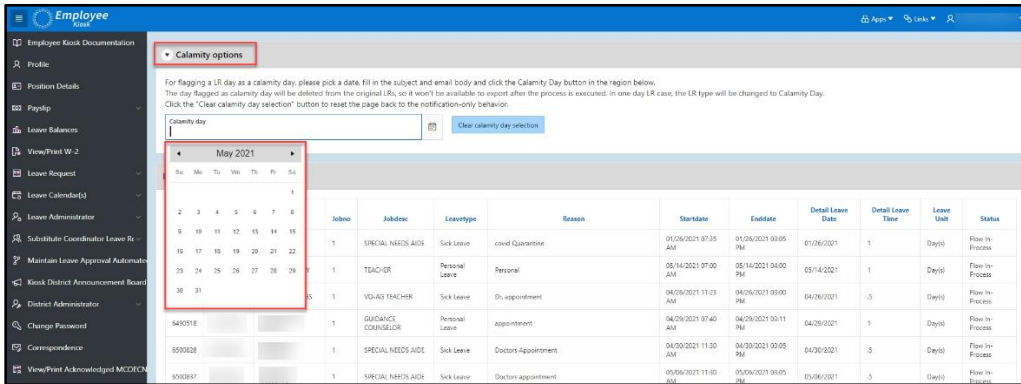
	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Leave Type	Sub Category	Job Desc	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed
Details					Nichole		Other	-	BUS DRIVER	02/14/2022 06:00 AM	02/14/2022 05:00 PM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Heather		Other	-	ASSISTANT TREASURER	02/14/2022 01:00 AM	02/14/2022 09:00 AM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Ira		Personal Leave	-	CUSTODIAN	02/14/2022 01:00 AM	02/14/2022 11:00 AM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Nichole		Other	-	Clinic Aide	01/20/2022 06:00 AM	01/20/2022 05:00 PM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Heather		Other	-	ASSISTANT TREASURER	01/03/2022 01:00 AM	01/03/2022 08:00 AM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Nichole		Other	-	BUS DRIVER	01/01/2022 06:00 AM	01/05/2022 05:00 PM	5.000	Day(s)	Flow Initiated Level 1	No
Details					Nichole		Other	-	BUS DRIVER	01/01/2022 06:00 AM	01/05/2022 05:00 PM	5.000	Day(s)	Flow Initiated Level 1	No
Details					Heather		Military	-	ASSISTANT TREASURER	12/09/2021 09:00 AM	12/09/2021 05:00 PM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Nichole		Other	-	BUS DRIVER	12/08/2021 06:00 AM	12/08/2021 05:00 PM	1.000	Day(s)	Flow Initiated Level 1	No
Details					Heather		Other	-	ASSISTANT TREASURER	12/08/2021 01:00 AM	12/15/2021 08:00 AM	8.000	Day(s)	Flow Initiated Level 1	No

- Scroll to the bottom of the page
- Click on 'Email Notification for filtered requests'

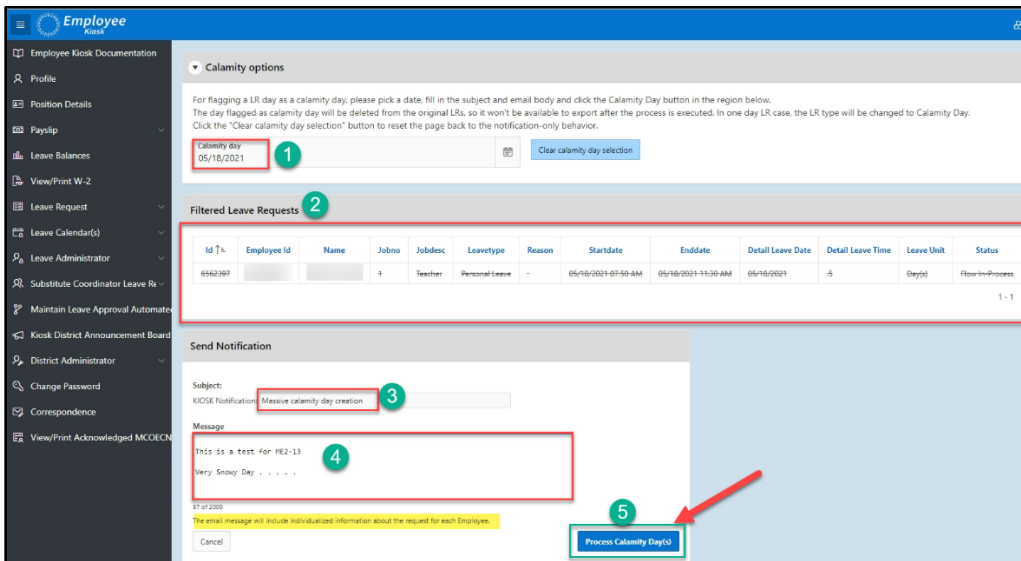
	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Leave Type	Sub Category	Job Desc	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Schedule Sub Last Name
Details					Brandy		Personal Leave	-	Aide	05/17/2021 07:55 AM	05/17/2021 03:10 PM	1.000	Day(s)	Flow In Process Level 3	Yes		
Details					Kathlyn		Personal Leave	-	Teacher	05/17/2021 07:56 AM	05/17/2021 03:10 PM	1.000	Day(s)	Flow In Process Level 3	Yes		
Details					Michael		Sick Leave	-	TEACHER	05/17/2021 07:30 AM	05/17/2021 03:00 PM	1.000	Day(s)	Flow Initiated Level 1	Yes		
Details					Jaye		Personal Leave	-	TEACHER	05/14/2021 08:00 AM	05/14/2021 03:00 PM	1.000	Day(s)	Flow In Process Level 3	Yes		
Details					Diane		Personal Leave	-	AIDE	05/14/2021 08:00 AM	05/14/2021 04:00 PM	1.000	Day(s)	Flow In Process Level 3	Yes		
Details					Angi		Personal Leave	-	PRE-SCHOOL TEACHER	05/14/2021 08:00 AM	05/14/2021 03:00 PM	1.000	Day(s)	Flow In Process Level 3	No		
Details					Marilyn		Personal Leave	-	TEACHER	05/14/2021 08:00 AM	05/14/2021 03:25 PM	1.000	Day(s)	Flow In Process Level 3	Yes	Diane Lyons	
Details					Derrick		Professional	-	VO-40 TEACHER	05/14/2021 07:45 AM	05/14/2021 11:47 AM	0.500	Day(s)	Flow In Process Level 3	No		
Details					Valerie		Personal Leave	-	SUBSTANCE COUNSELOR	05/14/2021 07:45 AM	05/14/2021 03:11 PM	1.000	Day(s)	Flow In Process Level 3	No		

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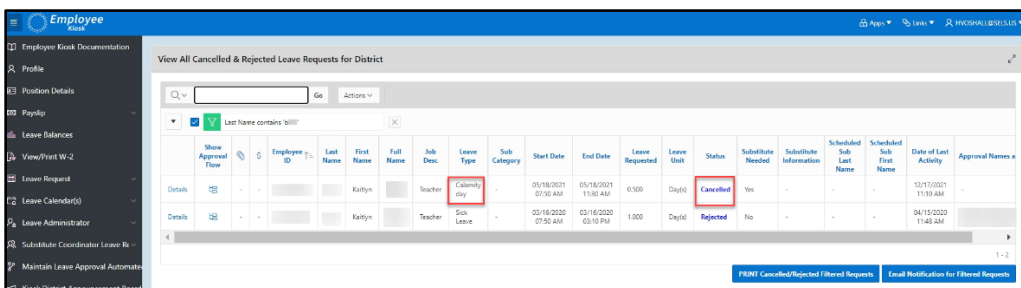
- At the top of the page, click on 'Calamity options'
- Click on the day you wish to mark as a calamity day



- Verify the date you selected and the staff affected are correct (#1 & #2)
- You may change the Subject line #3
- Enter a message for the notification #4
- Click on "Process Calamity Day" #5



- After it's processed; it will show cancelled for the employee.
- Click on View/Print District Requests dropdown
- Click on View/Print District Cancelled & Rejected Request(s) for a report



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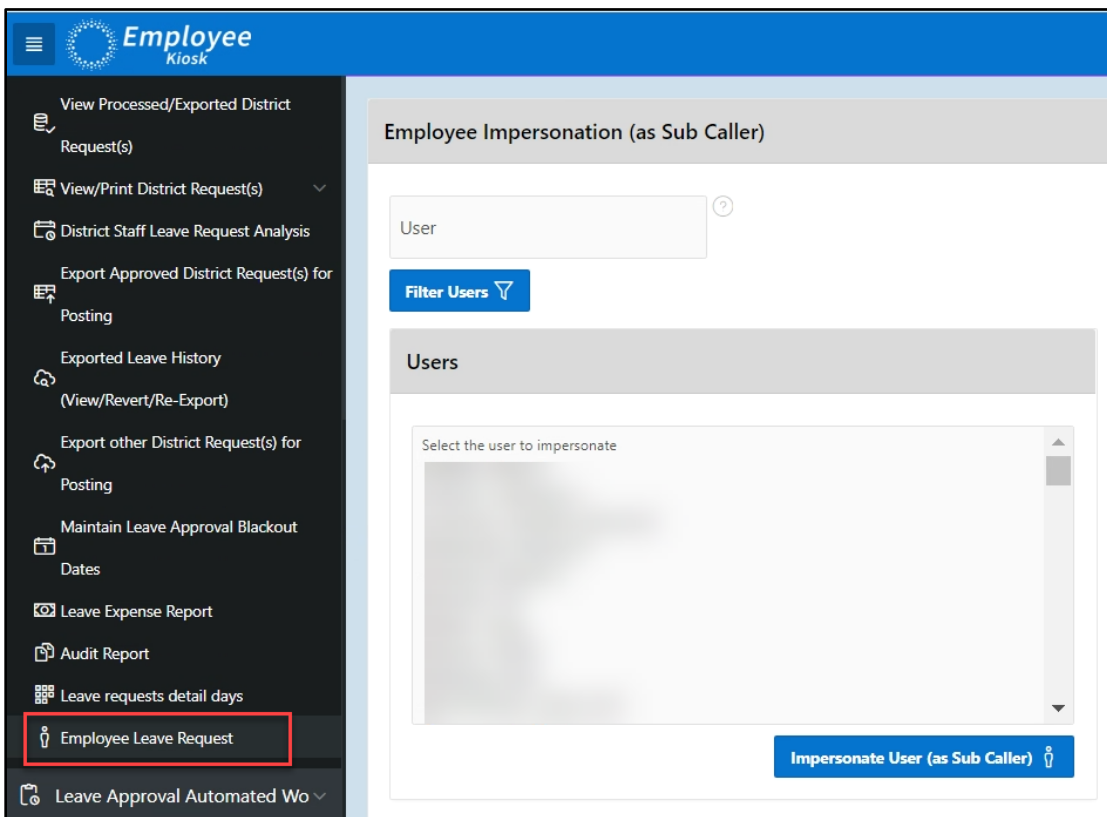
7. Leave Request sub caller or an administrator taking the call off ME2-14

Description:

- Allow a leave request to be entered for staff member by another staff member (sub caller or admin taking the call off). The users had this in AESOP, but want it in Kiosk instead. It is to include a notes section for who called in the request
- Only available for districts that are NOT integrated with Aesop
- Anyone with the following role would be allowed to do this:
 - Leave Administrator
 - Note: Functionality is NOT available to ITC staff

Location of the enhancement:

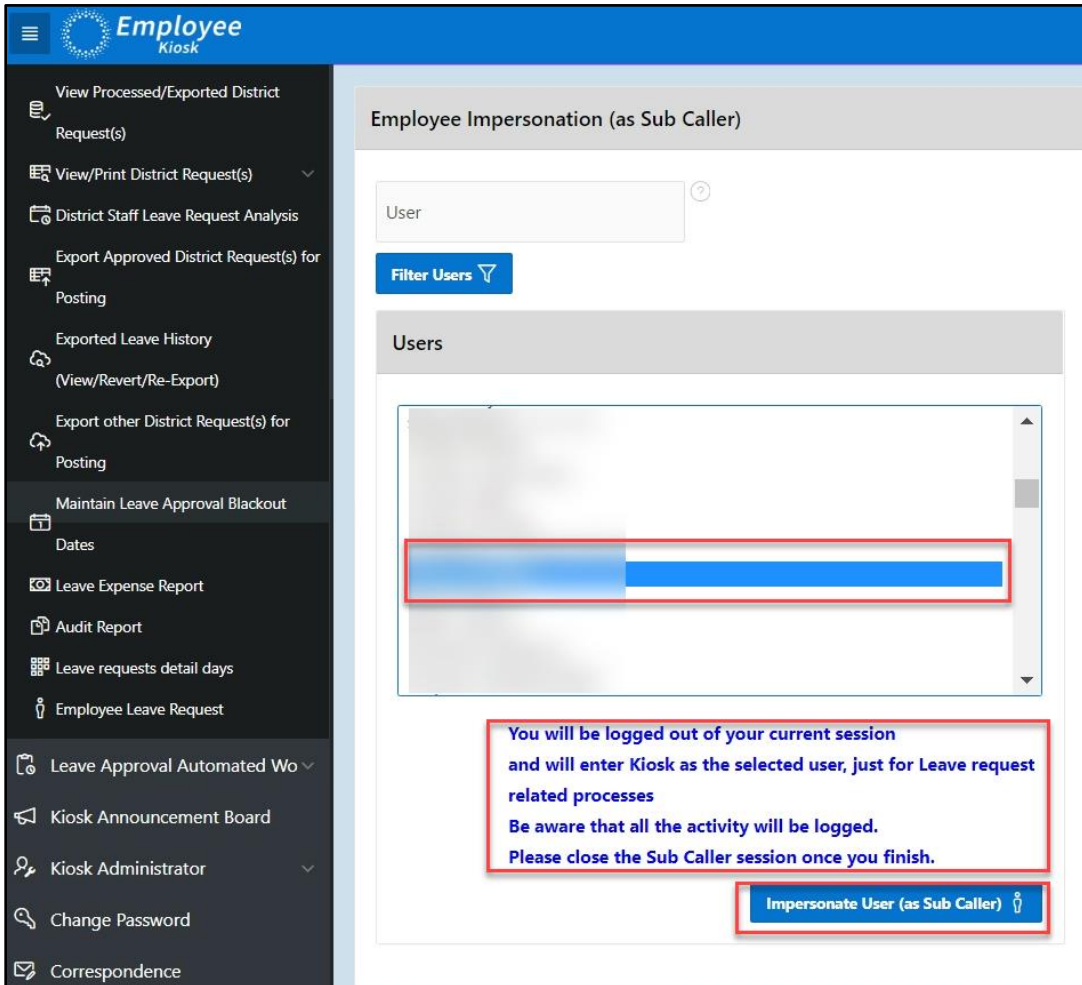
- Click on Leave Administrator dropdown
- Click on Employee Leave Request



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- Once you select a staff member, you get the below message, then click on the '*Impersonate User (as Sub Caller)*' button:

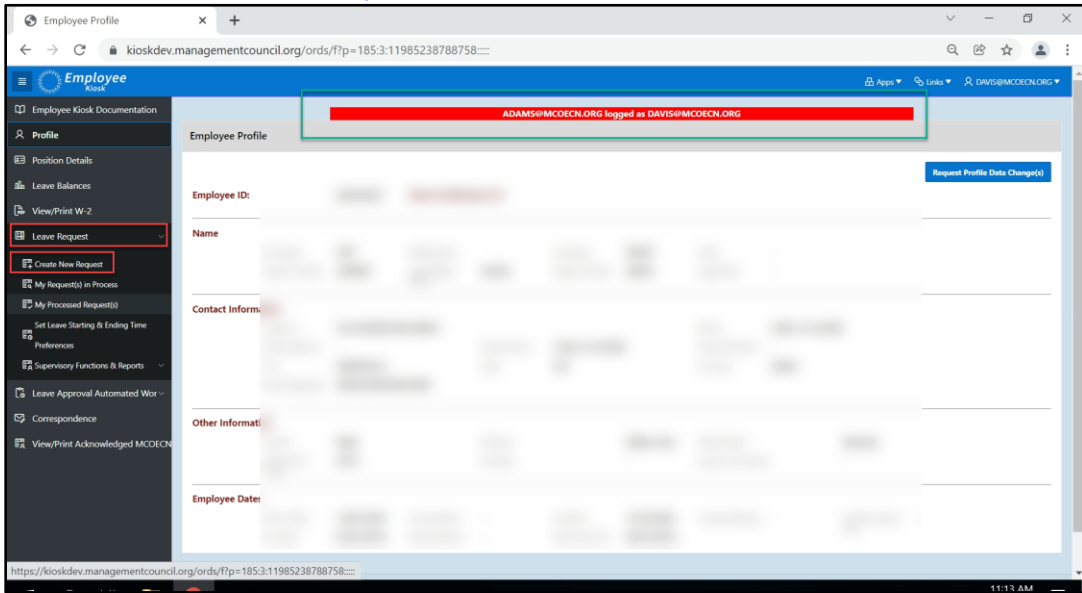


- As the Leave Administrator, you will see a notice at the top of the screen indicating that you are impersonating the user.

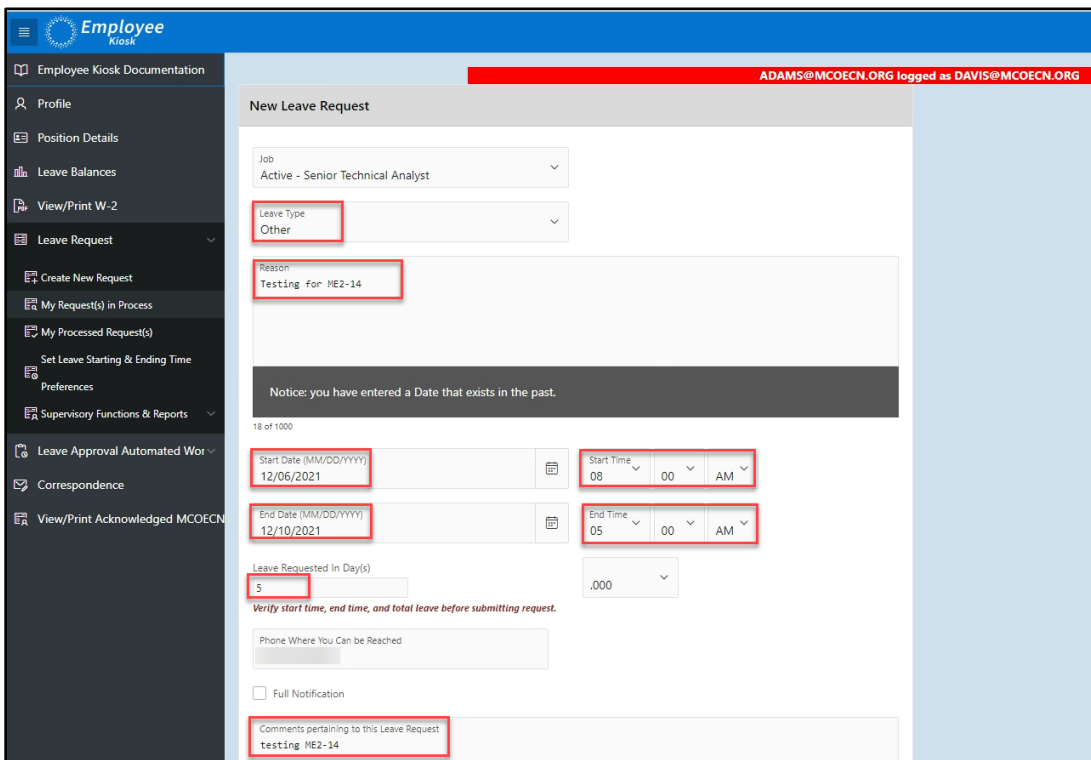


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- Click on Leave Request
- Click on Create New Leave Request



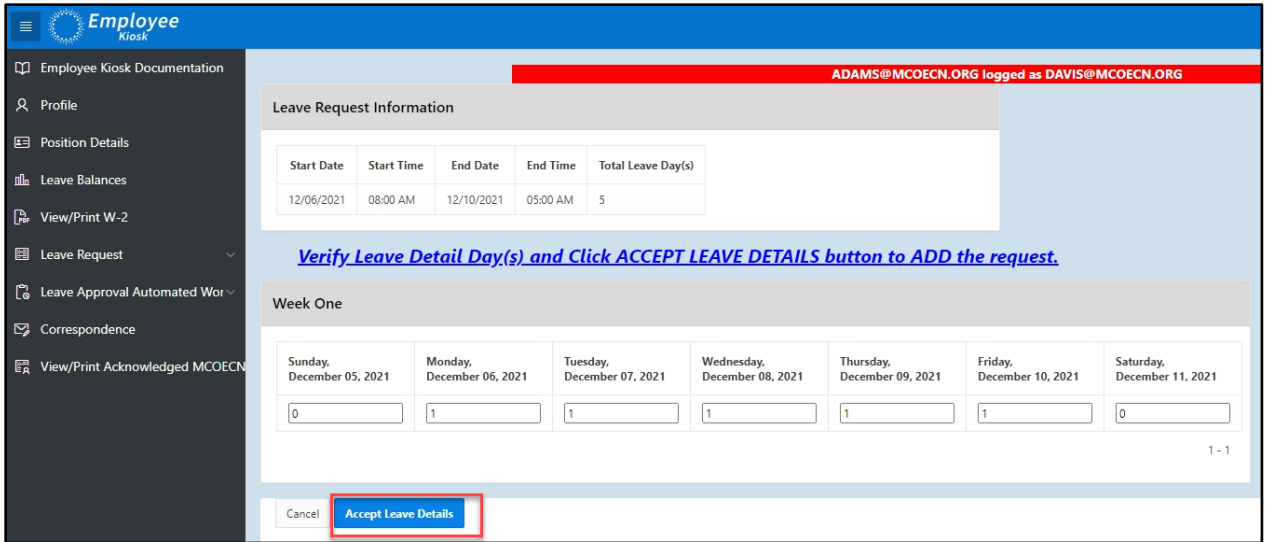
- Enter all pertinent information for the leave
- Click on submit



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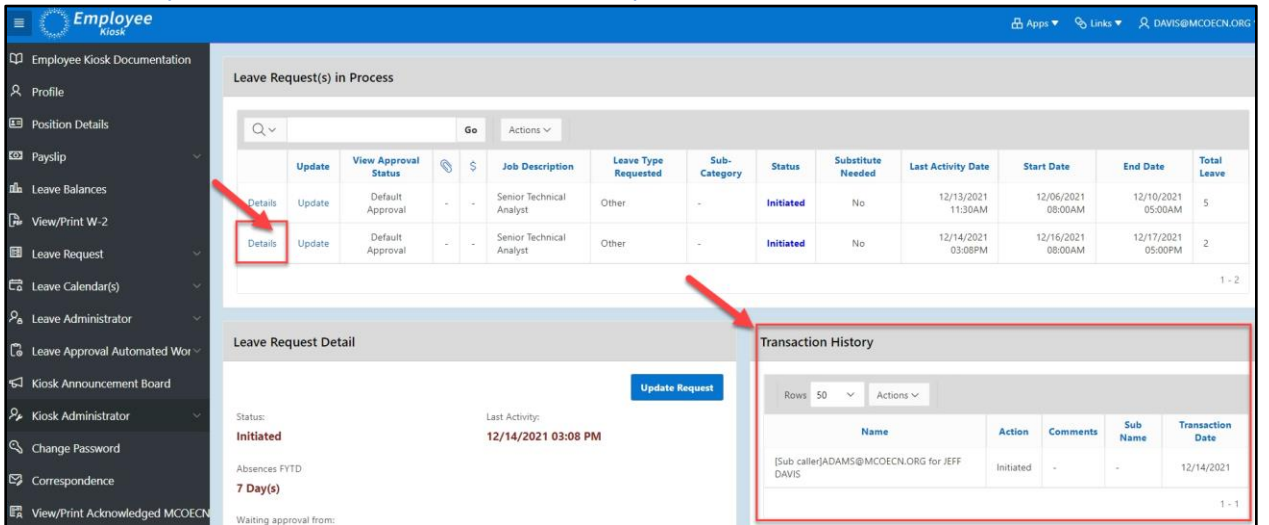
- Click on the Accept Leave Details Button



- ******To return to your Leave Administrator account, you will need to **logout** of the user's account



- The request will show "initiated" in the users account.
- Click on details to see the Transaction History
- This is where you will see who entered the Leave Request for Jeff Davis



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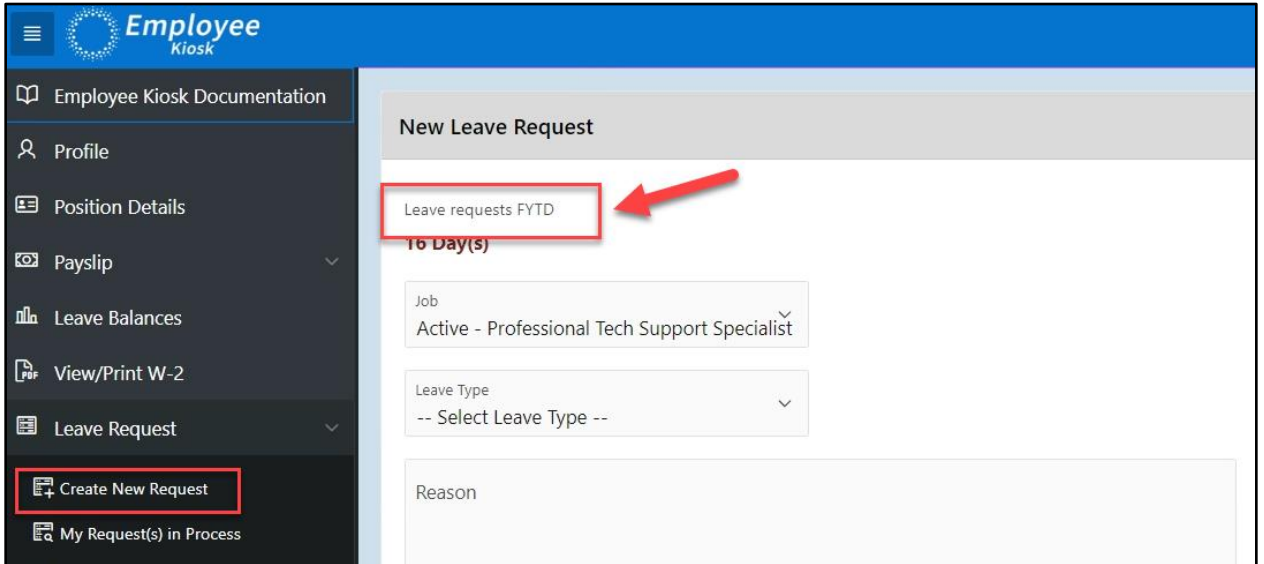
8. Leave requests FYTD ME2-24

Description:

- Change the title of the display from “Absences FYTD” → “Leave Requests FYTD”
- NOTE: only shows this information if the employee actually has Leave Requests for the current Fiscal Year

Location of the enhancement:

- Click on Leave Request drop down
- Click on Create New Request



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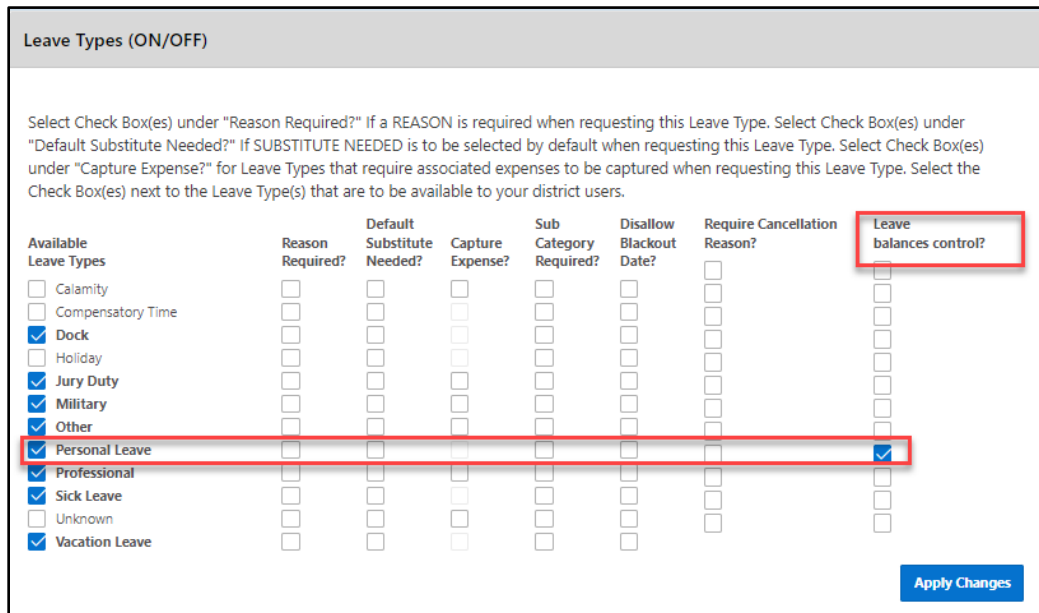
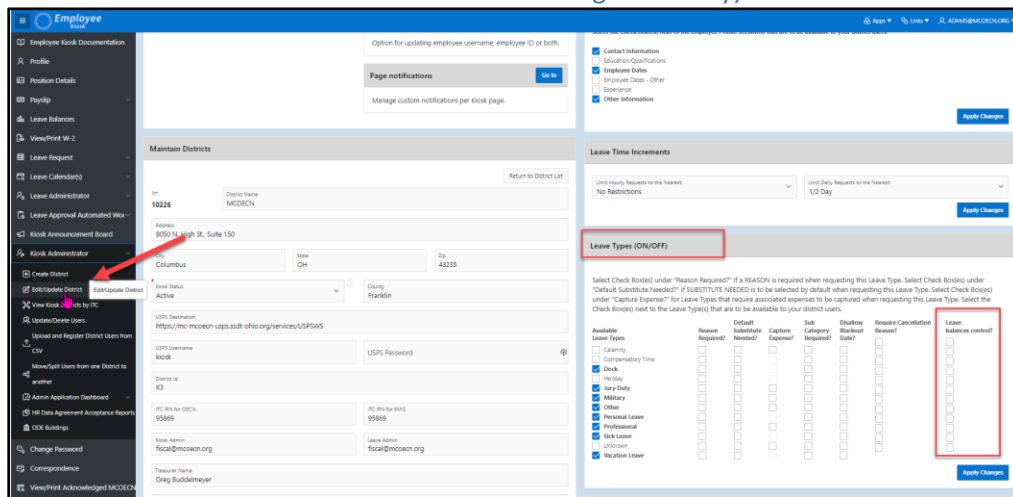
9. Prevent a leave request from going through if there is insufficient leave balance to cover the request ME2-26

Description:

- Prevent a leave request from being entered if there is not enough leave to cover the number of days being requested.
- **Important:** Must configure the restriction under leave information request section for each leave type.
- Kiosk Administrator Role can configure this option.

To Configure restriction for each leave type:

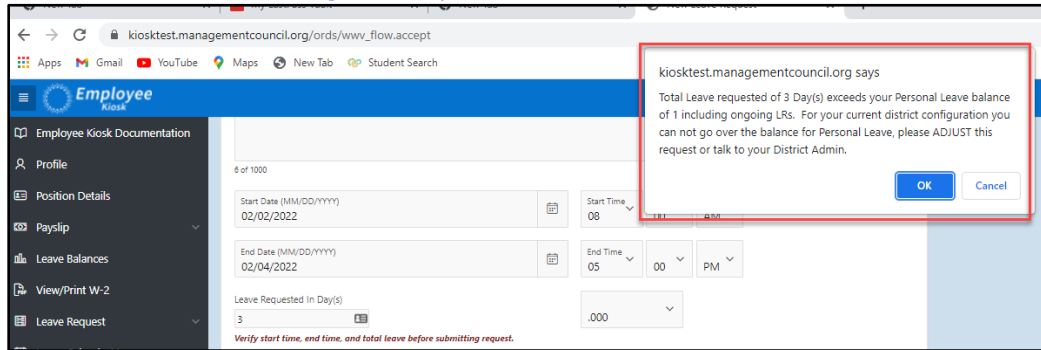
- Click on Edit/Update District
- Scroll down to the Leave Types Configuration Box
- If you wish to enable the Leave Balance Control; click on the box for each Leave Type (Make sure to count to the correct row since the boxes don't align correctly)



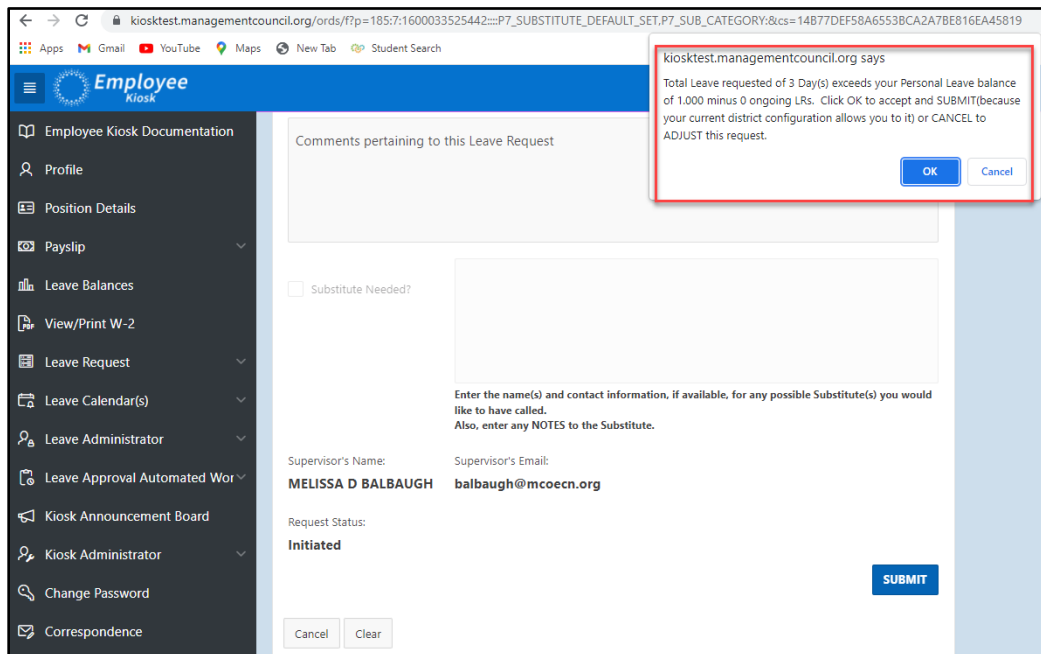
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- When an employee enters an absence and it goes over the number of days left in their balance; they will receive an error message. Example is listed below:



- If the district does not enforce this restriction, the user will get the following message:



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REPORTS/NOTIFICATIONS

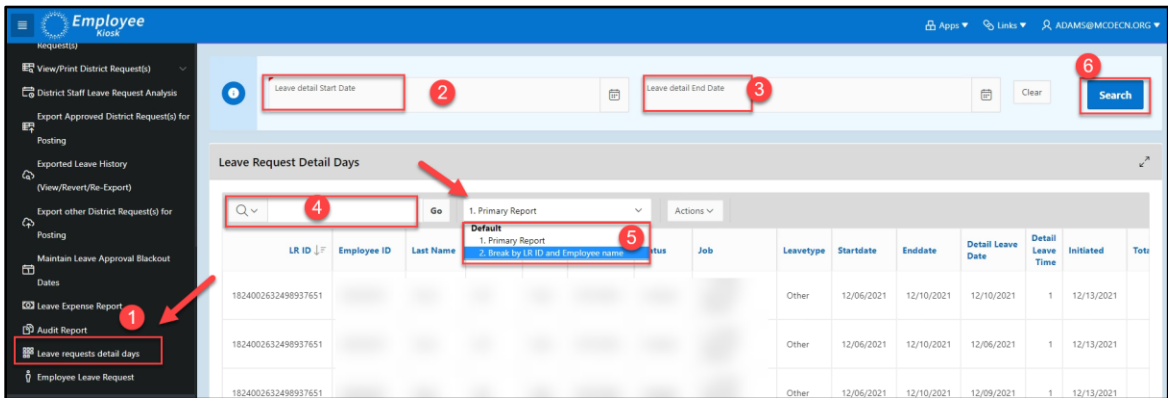
10. New Report, Date Range on Multiple Day LR ME2-15

Description:

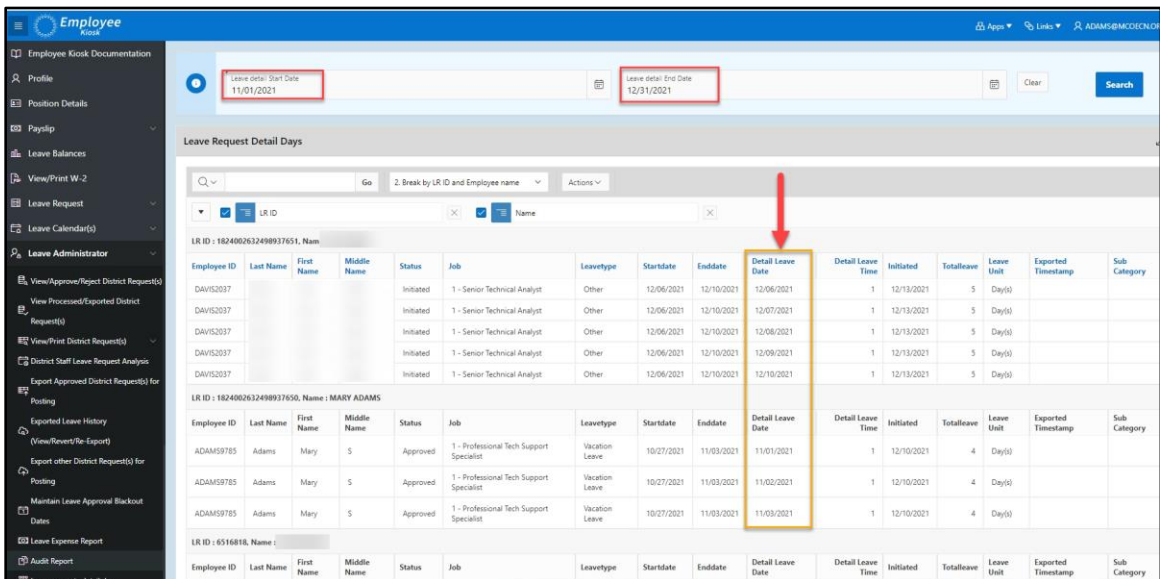
- Leave Request Detail days run by the Leave Administrator can be run by the following option "Break by LR ID and Employee Name"
- This report will show each day of a multiple day request individually when filtering for a day within the multi-day request.

Location of the enhancement:

- Leave Administrator
- Click on Leave Requests Detail Days
- Choose dates if you would like to limit the date range
- If you would like to filter for one staff member, select the correct person
- Click on search



- Each day is listed separately even if it was in a range of dates.
- Notice in the example below that the report for Mary shows 3 days listed, but 4 days of total leave, that is because we selected the date range of November 1--December 31. The 4th day of the leave was in October and not part of the first date range filter.



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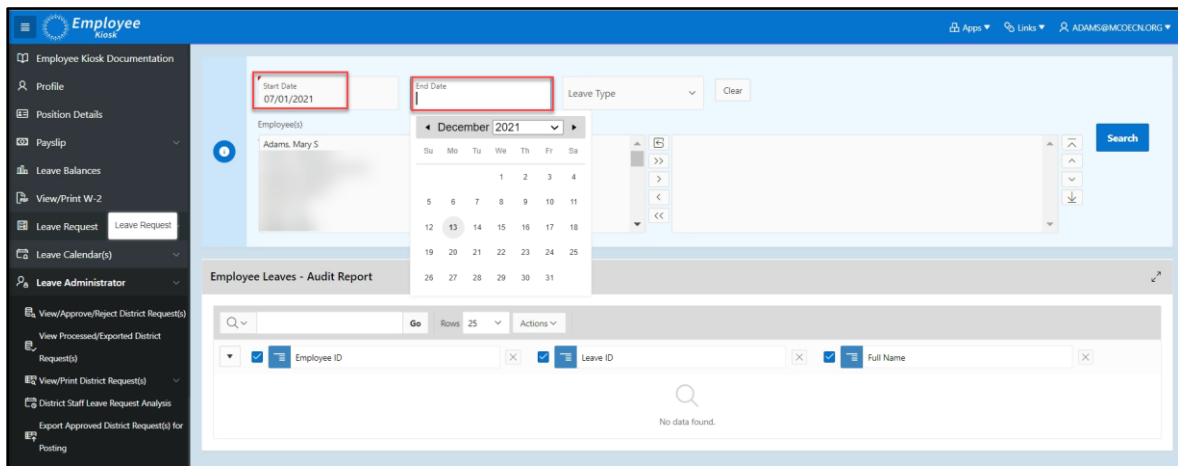
11. Customized Leave Request report for Auditors – ME2-19

Description:

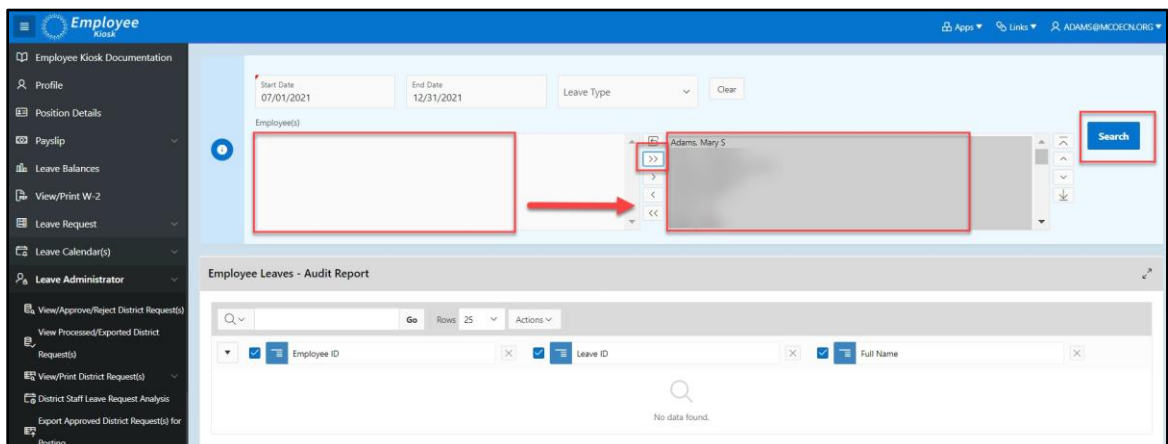
- Only Leave Administrators can print the Audit Report.
- You can print a select group of people to go into the report
- For exported information about the employees, it also includes the transaction history name, action, sub name, transdate
- Reports affected:
 - i. Employee Leaves
 - ii. Approved & Exported Leave Request(s)
 - iii. Employee Leaves-Audit Report

Location of the enhancement:

- Leave Administrator
- Click on Audit Report
- Employee Leaves-Audit Report
- Enter start/end dates
- Click on search



- Select employees
- Click on the double arrow to move the list to the right side screen
- Then click on the Search button



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Status	Job	Start Date	End Date	Requested Date	Reason	Substitute Information	Last Activity	Date Expired	Sub Category	Total Leave	Transaction History ID	Transaction History Name	Transaction History Action	Transaction History Sub Name	Transaction History Translate
Approved	T - Professional Tech Support Specialist	08/30/2021	09/10/2021	03/02/2021	Vacation			03/02/2021		10	2068158		Flow In/Out		03/02/2021
Approved	T - Professional Tech Support Specialist	08/30/2021	09/10/2021	03/02/2021	Vacation			03/02/2021		10	2068158		Flow In/Out		03/02/2021
Approved	T - Professional Tech Support Specialist	08/30/2021	09/10/2021	03/02/2021	Vacation			03/02/2021		10	2067731		Approved		03/02/2021
Approved	T - Professional Tech Support Specialist	08/30/2021	09/10/2021	03/02/2021	Vacation			03/02/2021		10	2067731		Approved		03/02/2021
Approved	T - Professional Tech Support Specialist	10/18/2021	10/18/2021	12/10/2021				12/10/2021		2	1824050433489837688		Flow In/Out		12/10/2021
Approved	T - Professional Tech Support Specialist	10/18/2021	10/18/2021	12/10/2021				12/10/2021		2	1824050433489837688		Flow In/Out		12/10/2021
Approved	T - Professional Tech Support Specialist	10/18/2021	10/18/2021	12/10/2021				12/10/2021		2	1824050433489837688		Approved		12/10/2021
Approved	T - Professional Tech Support Specialist	10/18/2021	10/18/2021	12/10/2021				12/10/2021		2	1824050433489837688		Approved		12/10/2021
Approved	T - Professional Tech Support Specialist	10/27/2021	11/03/2021	12/10/2021				12/10/2021		4	1824050433489837687		Flow In/Out		12/10/2021
Approved	T - Professional Tech Support Specialist	10/27/2021	11/03/2021	12/10/2021				12/10/2021		4	1824050433489837687		Flow In/Out		12/10/2021
Approved	T - Professional Tech Support Specialist	10/27/2021	11/03/2021	12/10/2021				12/10/2021		4	1824050433489837689		Approved		12/10/2021
Approved	T - Professional Tech Support Specialist	10/27/2021	11/03/2021	12/10/2021				12/10/2021		4	1824050433489837689		Approved		12/10/2021

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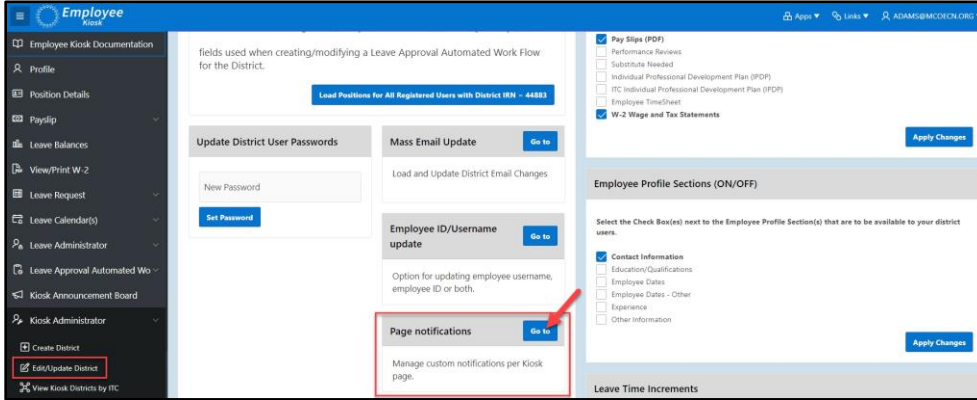
12. Add notifications per district prior to Leave Request creation ME2-16

Description:

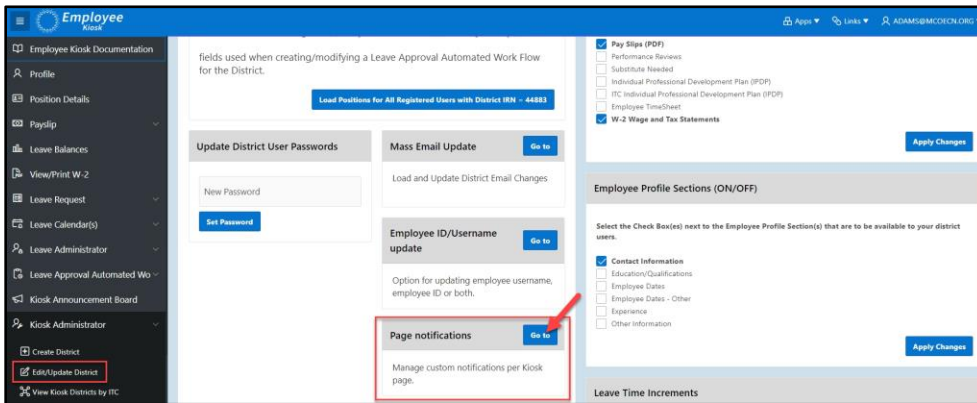
- Notification message (per district) to display prior to an employee creating a leave request
- Use the Interactive Grid found in Kiosk where you can assign a notification to any kiosk page
- Kiosk Admins can set this up for their districts

Location of the enhancement:

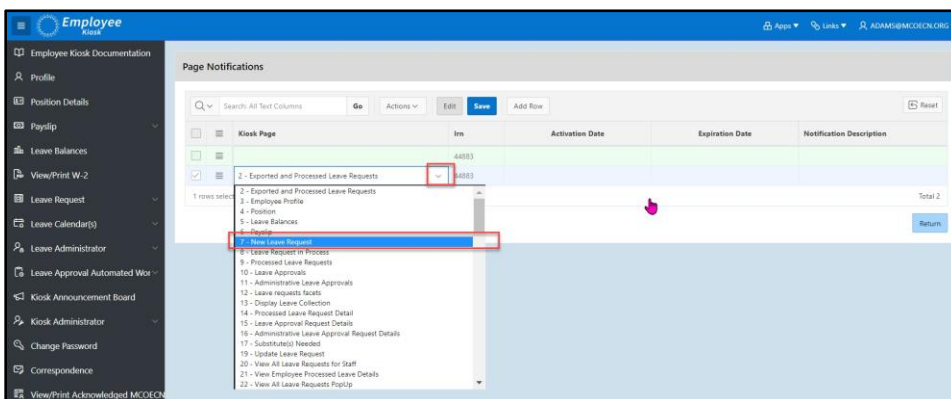
- Click on Edit/Update District
- Scroll down to Page Notifications
- Click on the 'Go to' button



- Click on the gridlines (waffle)
- Click on '+ Add row'

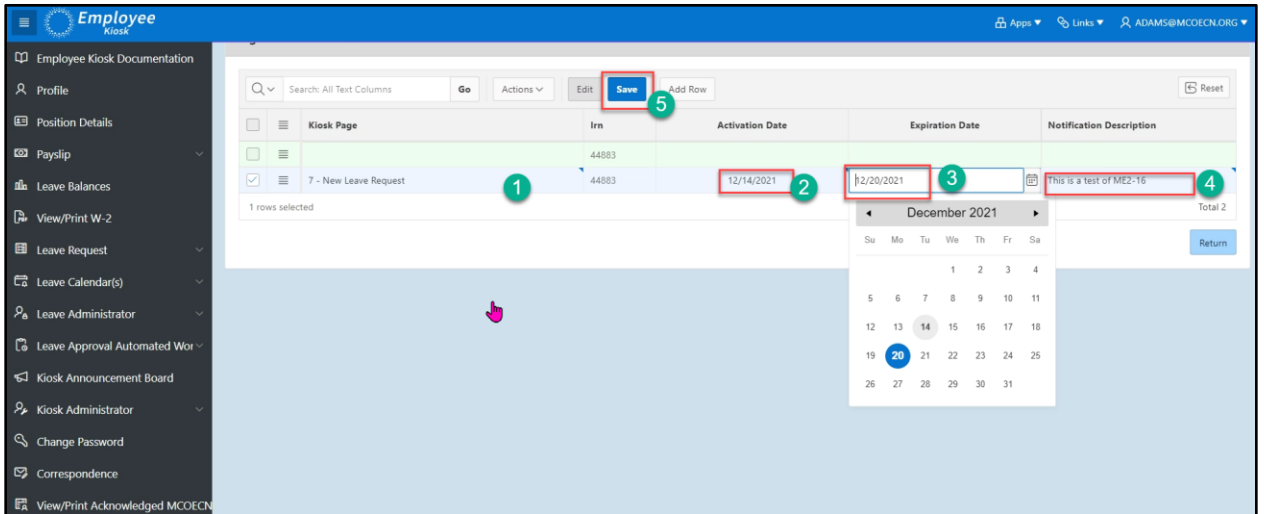


- Select the page you want to add a notification to from the drop down



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- Enter the dates that the notification should be in effect.
- Enter the message in the 'Notification Description' column
- Click on save when finished



- The message will appear on the screen you selected

