

# Employee Web Portal User Guide

Concord Public Schools (CPS) and Concord-Carlisle Regional School District (CCRSD) are implementing a web-based application to provide you with employment information at your fingertips. The immediate focus is to make available via the portal the following components:

- Pay
- Attendance
- Forms
- Documents

This guide will explain how to self-register for access to the web portal and how to review your personal information within the portal. There is a web portal for each school district.\*

\*If you are a joint employee, you will need to self-register in both portals in order to view your pay information from both school districts. Your attendance information will be maintained in the CPS portal only.

## Registering to Access the Web Portal:

If you have not accessed the CPS or CCRSD web portals in the past, you will need to self-register for the one applicable to your employment (please register on both if you are a joint employee). To do so, open any Internet browser and enter one of the following addresses in the address bar:

CPS: <https://unifund.colonial.net/ConPSchPortal>

CCRSD: <https://unifund.colonial.net/ConCSchPortal>

This will bring you to the main page of the corresponding web portal. To register, click on the **Register** link at the top, right-hand corner of the page. This will open the **Preferred User Information** page shown below where you will create a user account for yourself:

The screenshot shows a web browser window with the address bar displaying "Home" and "Web site" options. The page title is "Preferred User Information". The main content area contains a form with the following fields:

- User Name:
- First Name:
- Last Name:
- Display Name:
- Email Address:

Below these fields is a section titled "Enter a password." with two fields:

- Password:
- Confirm Password:

A "Register" button is located at the bottom of the form. A note at the top of the form reads: "\*Note: Membership to this portal is Verified. Once your account information has been submitted, you will receive an email containing your unique Verification Code. The Verification Code will be required the first time you attempt to sign in to the portal environment. All fields marked with a red arrow are required." The footer of the page contains the text "Copyright 2002-2009 Unifund, LLC Terms of Use Privacy Statement".

Please use the following guidelines when creating your user account:

**User Name:** Enter your first initial plus your last name (i.e. jsmith for John Smith).

**First Name:** Enter your first name.

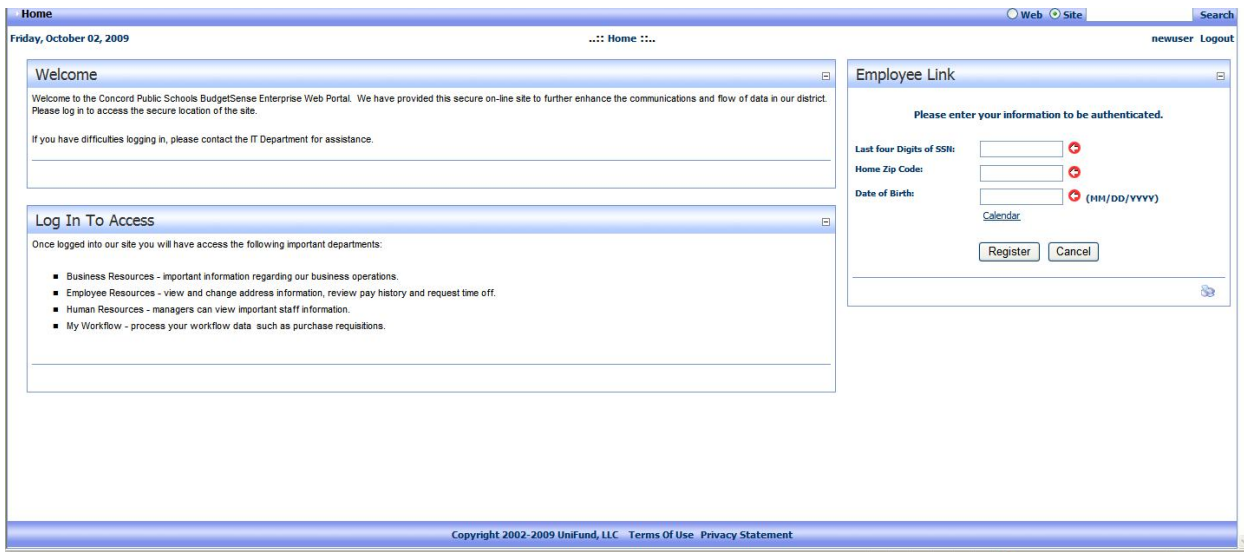
**Last Name:** Enter your last name.

**Display Name:** Enter the name you would like to display when you are logged into the portal.

**Email Address:** Enter the email address where you would like to receive email communications from the Web portal.

**Password:** Enter a string at least 7 characters in length.

Once you have entered the above information, click on the **Register** link at the bottom of the page. You will be sent an email with a link used to complete your employee registration. The link will bring you to a login page on the portal with your username and verification code already entered. Enter your password to log in. The following page will open:



The screenshot displays a web portal interface. At the top, there is a navigation bar with 'Home', 'Web', 'Site', and 'Search' options. The date 'Friday, October 02, 2009' is shown on the left, and 'newuser Logout' is on the right. The main content area is divided into three sections:

- Welcome:** A message stating 'Welcome to the Concord Public Schools BudgetSense Enterprise Web Portal. We have provided this secure on-line site to further enhance the communications and flow of data in our district. Please log in to access the secure location of the site.' It also includes a note: 'If you have difficulties logging in, please contact the IT Department for assistance.'
- Log In To Access:** A section titled 'Once logged into our site you will have access the following important departments:' with a bulleted list:
  - Business Resources - important information regarding our business operations.
  - Employee Resources - view and change address information, review pay history and request time off.
  - Human Resources - managers can view important staff information.
  - My Workflow - process your workflow data such as purchase requisitions.
- Employee Link:** A form titled 'Please enter your information to be authenticated.' with fields for 'Last four Digits of SSN:', 'Home Zip Code:', and 'Date of Birth:'. The 'Date of Birth' field includes a 'Calendar' link and a '(MM/DD/YYYY)' format indicator. Below the fields are 'Register' and 'Cancel' buttons.

At the bottom of the page, there is a footer with the text: 'Copyright 2002-2009 UniFund, LLC Terms Of Use Privacy Statement'.

Enter the requested personal information and click on the **Register** button. Your name and address will be displayed on the screen for you to verify. Once verified, your user account will be linked to your personal employee information so that you can access it through the portal.

Note: You will only have to go through this registration process once. When you log into your account in the future, you will automatically be linked with your personal employee information.

## **Logging into the Employee Web Portal:**

Open any Internet browser and enter one of the following addresses in the address bar:

CCRS: <https://unifund.colonial.net/ConCSchPortal>

CPS: <https://unifund.colonial.net/ConPSchPortal>

This will bring you to the main page of the corresponding web portal. We recommend that you bookmark the above addresses in your web browser for future reference.

Click on the **Login** link at the upper right hand corner of the screen. Enter your username and password and click on the **Submit** button. This will bring you to the **Welcome Page** of the portal.

## **Managing your User Profile in The Employee Web Portal:**

To update your user profile information, click on your name located on the upper right-hand corner of the screen. You can change your user information here. In addition, you can change your password from this screen. To do so, click on the **Manage Password** link and enter a new password. Your new password must be at least 7 characters in length. When you are done, click on **Change Password** at the bottom of the screen. You will receive a message at the top of the screen notifying you that your password has been successfully changed.

If you forget your password, you can have it emailed to you by clicking on the **Forgot Password?** link at the bottom of the **User Log In** screen. Enter

## **Navigating within The Employee Web Portal:**

There is a menu bar at the top of the screen with the following options:

- The **Employee Resources** menu gives you access to your personal employee information.
- **My Workflow** menu gives you access the business processing you are authorized for in BudgetSense. Not all users will see this menu item.

## **The Employee Resources Menu:**

Under the Employee Resources menu, you currently have access the following options:

- Information Center
- Compensation
  - Payroll Dates
  - Pay Period
  - Calendar Year
  - W2 Information
- Attendance
- Profile
  - Contact Information
  - Emergency Contacts
  - Personal Information

The following sections describe each menu item listed above. If you would like more detailed help for any of these modules, you can click on the blue question mark icon at the top, right-hand corner of the screen or use the following link:

<http://www.unifundonline.com/ClientCenter/WebSense/Welcome to WebSense.htm>

In the **Help Center**, click on the topic you are looking for under **Employee Resources**.

**Employee Resources/Information Center:**

The Information Center is the welcome area to the Employee Resources of the web portal. In this area you will find important information regarding attendance, compensation, benefits, forms, documents, and helpful links.

**Employee Resources/Compensation/Payroll Dates:**

The **Payroll Dates** option displays the payroll dates for the current fiscal year.

**Employee Resources/Compensation/Pay Period:**

The **Pay Period** option allows you to select any individual payroll that has been processed within this past fiscal year to pull up a snapshot of what your paycheck was for that pay date.

To view a specific pay date, click on the **Pay Date** field on the top, right-hand corner of the screen and select the pay date you wish to view. Click on the small printer icon at the bottom right-hand corner of the screen to print out the payroll data snapshot.

**Employee Resources/Compensation/Calendar Year:**

The **Calendar Year** option allows you to view your total calendar year-to-date accumulations for any of the calendar years available in BudgetSense.

To view your calendar year accumulations, enter the year you want to view in the **Year** field at the top of the statement and click on the **Show Statement** button. Your calendar year accumulations will appear on the screen. Click on the small printer icon to the bottom right corner of the screen to print out the calendar year accumulations.

**Employee Resources/Compensation/W2 Information:**

The **W2 Information** option allows you to view and print your current W2. To view your W2, click on **W2 Wages and Tax Statement**. Your current W2 will be opened as a PDF file. You can print a copy of your W2 from the PDF file.

**Employee Resources/Attendance:**

The **Attendance** module allows you to view your available leave plan balances and enter leave requests for your supervisor's approval and posting by the business office. Leave request functionality will be available in early 2010.

**Plan Summary Box**

On the **Attendance** screen, you will see a **Plan Summary** of your leave plans. The information available here includes the plan name, beginning balance, days earned according to the leave plan, days used, adjustments, available balance, requests pending approval and future scheduled leave.\*

\*Please note that requests pending approval and future scheduled leave will not be populated until the leave request feature is implemented.

If you wish to print the summary leave plan information, click on the small printer icon in the bottom right corner of the screen. If you wish to see the detailed transactions for a leave plan, click on the magnifying glass icon to the left of the plan.

**Employee Resources/Profile/Contact Information:**

The **Contact Information** option allows you to view the current demographic information that the HR department has on file for you. If you wish to print this information, click on the small printer icon located at the bottom right corner of the screen.

In addition, you can make changes to your contact information and submit them to the HR department for posting. To modify your information, click on the **Modify** button in the middle of the screen. You will be prompted to enter the last 4 digits of your social security number. Then you can edit the data in any of the contact information fields except for the first and last name fields. Click on the **Submit** button to submit your updated information to the HR department for posting. You will see your pending contact information updates in the **Requested Changes box**. Once HR posts your updates, you will receive a confirmation email.

**Employee Resources/Profile/Emergency Contacts:**

The **Emergency Contacts** screen displays your existing emergency contacts.

To add a new emergency contact, click the **Add New Contact** button. Fill in the fields and click on the **Submit** button to save that new contact record.

If any of your existing contacts need to be updated, click on the magnifying glass icon to the left of that record. You can update the information for this contact or delete this contact here.

**Employee Resources/Profile/Personal Information:**

The **Personal Information** option enables you to view various types of personnel-related data that the HR department is tracking. Click on the link for the information you would like to view. Changes cannot be made to the information in this section through the Employee web portal. If the information listed here is incorrect, please contact the HR department.