

Tyler Technologies, Inc.

SISFin




SISPortal User Guide

Portal User - Login

Navigate to <https://xxxxportal.com> (URL will be provided by your technology department) and select the SISFin Portal graphic. A link to this site may also be listed on the school district's website.

You must first log in to the portal. For first time users your user ID is your email address and password will be your employee ID in SISFin. See Payroll/Personnel department if you do not have this information.

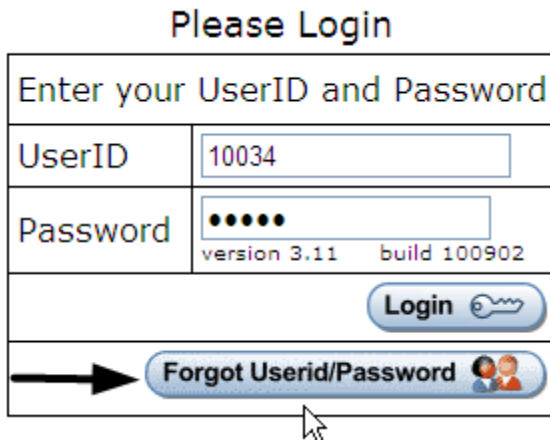
First Time Login

As soon as you log in for the first time, you will see a message explaining how to change your User ID and Password. If you choose not to change them, just click the  button.



Forgot Your User ID or Password?

Click on the button, Forgot Userid/Password and the information will be emailed to you. (Email addresses must be set up in the user's demographic record on the MISC tab.)



Portal Menu

Once you have logged in successfully, you will see the "Main Menu" screen.



The top portion of the menu contains HR related items.




The bottom portion of the menu is designated for other SISFin actions and or items.

Change UserID, Password


You can change your User ID and or Password anytime you are logged in by selecting “Change UserID, Password” from the Portal Menu.

View Personal and W4 Information

When viewing this screen, if you wish to make changes to your W4 withholdings, click on the icons provided for Federal IRS or State at the bottom of the page to print a blank W4 to be filled out and sent to Central Office.

Personal Information		
Name and Address	June R. Burton 123 Test Street Testy MO	
Phone Number		
Email Address	jburton@school.k12.mo.us	
Birth Date	10/25/1962	
Hire Date	9/30/2008	
	Federal W4	State W4
Marital Status	Married	Married - Spouse Works
Dependents	0	
Dependents State		0.0000
Personal State		0
Additional	25.00	15.00
Fixed	0.00	0.00
Fixed Percent	0.00	0.00
 click HERE to print/display IRS Form W4.		
 click HERE to print/display Missouri Form W4.		
 click HERE for the Social Security Administration web site.		

Submit Personal Info Changes

If you need to request an address, name or phone # change, click the  button and then click “Submit Personal Info Changes” link. Fill in the fields you wish to change and assign this request to a route for approval. Click the Submit button.

This does not actually change your information in SISFin. It is a request to have it changed. Keep in mind that some personal information cannot be changed until the proper legal documentation is provided.



Only fill out the information that is changing. Leave the rest of the fields blank.

The screenshot shows the SISPortal user interface. At the top left is a "Home" button. At the top right is a "Welcome, June R" message. Below the welcome message is a notification: "Legal documentation must be turned in to Central office before name changes will take in SISFin." Below this is a section titled "Current Personal Information" with the following details: Name and Address: June R Burton, 123 Test Street, Tasty MO; Phone Number: (blank); Email Address: jburton@school113.ms.us. Below this is a section titled "Enter Personal Information Changes" with the following fields: First Name, Middle Name, Last Name, Suffix, Address, City (pre-filled with "Inperial"), State (pre-filled with "MO"), Zip Code (pre-filled with "83352"), Phone (000) 000-0000, Email Address, Effective Date (mm/dd/yyyy) (pre-filled with "12 / 01 / 2010"), and Routing (pre-filled with "Personal changes"). A "Submit" button is at the bottom of the form.

View Leave Balance

This screen is only for viewing your leave balances. You will also see Leave detail of any type of leave you have used in the current fiscal year.

To make a Leave Request, click the  button and choose the link "Submit Leave Request" from the main menu.



Leave Balance					
Leave Name	Start Year	YTD Earned	YTD Used	YTD Docked	Balance
Vacation	0.00 hours	40.00 hours	0.00 hours	0.00 hours	40.00 hours
Personal	0.00 hours	14.00 hours	0.00 hours	0.00 hours	14.00 hours
Sick	0.00 hours	80.00 hours	0.00 hours	0.00 hours	80.00 hours
Prof Leave	0.00 hours	80.00 hours	8.00 hours	0.00 hours	72.00 hours

Leave Detail					
Transaction Date	Leave	Units	First Day	Last Day	Description
9/30/2009	Prof Leave	8.00 hours	10/20/2009	10/20/2009	

Submit Leave Request

When submitting a leave request all fields containing * are required.

The Duration field should be entered in either hours or days depending on your system setting in SISFin. If you track leave by hours, enter number of hours you are requesting to be absent. If you track your leave by days, enter the number of days you are requesting off.

Use the drop down menu to choose which type of leave you are using for this absence.

Choose the route this leave request must go through using the drop down provided.


If a substitute is required for that period, please place a check mark in the field provided.

The comments screen is anything you wish to convey to the approvers and or to



payroll. Example: Please call J. Smith in as my sub.
 Example: 2 PM daughter's doctor appt.


Using the drop down provided, choose which location you will be absent from. If you only work in one location, you will only see one option.

 Submit Leave Request * = required entry	
Name	June R Burton
From Date (mm/dd/yyyy)*	10 / 23 / 2009
To Date (mm/dd/yyyy)*	10 / 23 / 2009
Duration*	8
Type of Leave*	Sick
Leave Request Routing*	Leave - CO
Substitute Required	<input type="checkbox"/>
Comments	type comment here
Location	School Information Systems
<input type="button" value="Submit"/>	

View Leave Request Status

To view the status of your requests click the link provided on the main menu.


 View Leave Request Status								
Step	Status	Note	From Date	To Date	Duration	Location	Date Requested	
1	Approved		Tuesday, Oct 20 2009	Tuesday, Oct 20 2009	8:00		Sep 29, 2009	This request has been posted. Contact your supervisor if you want to cancel or change it.
2	Approved							
1	Pending		Friday, Oct 23 2009	Friday, Oct 23 2009	8:00		Oct 2, 2009	<input type="button" value="Cancel"/> 
2	Pending							

You may cancel a leave request anytime prior to it being posted in SISFin by clicking the  button. If leave has been posted please contact your



Payroll department to cancel.

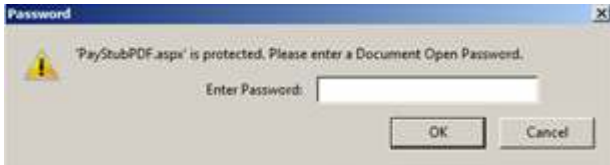
View Pay History

When viewing pay history, you have the ability to choose from which fiscal year using the “Year” drop down. If you want to print a pay stub, you must have adobe acrobat reader, (version 9 or higher) installed on the computer you are printing from. Click  button.



Pay History										Year: July 1, 2009 to June 30, 2010		Page 1 of 1	
Gross Pay	Fed Tax	State Tax	City Tax	OSDI	Medicare	PSRS	PEERS	Other	Ded	Net Pay	Date	Check #	
6,000.00	486.91	221.00	0.00	0.00	87.00	866.46	0.00	0.00	532.00	3,806.63	7/20/2009	212407	
6,000.00	486.91	221.00	0.00	0.00	87.00	866.46	0.00	0.00	532.00	3,806.63	8/20/2009	212415	
6,000.00	486.91	221.00	0.00	0.00	87.00	866.46	0.00	0.00	532.00	3,806.63	9/20/2009	212425	

For security purposes, you will be prompted for a password. Every user’s password is the last 4-digits of their social security number.



The View Benefits and View Deductions links allow you the same options as View Pay History.

Each time you want leave the current screen, click the home button to return to the main menu.

Professional Development

The PD module within SISFin can be accessed from two different places - from



Proprietary and Confidential

Personnel → Employee → Professional Development, or from Personnel → Demographic Information → Choose Employee → View → Professional Development. This module stores information about classes/courses an employee has taken.

Note: The PD Module is strictly for record-keeping. Information stored there is NOT tied to anything else in SISFin. For example, recording a course in PD will not increase the employee step/column on the salary schedule.

 Add Professional Development Course Request

Course Date (mm/dd/yyyy)	<input type="text"/>
Course Number	<input type="text"/>
Course Description	<input type="text"/>
Course Type	Seminar <input type="button" value="v"/>
Institution	<input type="text"/>
Instructor	<input type="text"/>
Reimburse Amount	<input type="text"/>
Notes	<input type="text"/>
Approval Route	Select a Route... <input type="button" value="v"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

To make a request through the Portal, enter Course Date, Course Number, Course Description, Course Type (types are maintained in SISFin), Institution, Instructor, Reimburse Amount if applicable, add any notes and choose the appropriate approval route.

Requisitions

To create a new requisition click the “Requisitions” link provided from the main menu.

Select Vendor		Request New Vendor	Page 1 of 10
Name	Branch	Address	City State Zip
Select ✓ Ace Hardware		221 Main St	Arnold MO 63010
Select ✓ Adams, John C		6309 Beautiful Drive	Anywhere MO 689995555
Select ✓ Amazon Books		6309 Reading	School City MO 679997777
Select ✓ Ameren UE		6868 Electric Drive	Someplace MO 636994444
Select ✓ Ameren UE		kdjgfs	
Select ✓ Annuity One		123 Street	Town MO 641111111
Select ✓ Annuity Two Vendor		Railroad Ave	Russellville MO 65074
Select ✓ Baker, Crystal Y		65487 Road One	St. Louis MO 61441
Select ✓ Bakers Plays		100 Chauncy St	Boston MO 021111783
Select ✓ Bechman's Const. Co., Inc.		74633 Main St	Imperial MO 63062



Next select the button. This will take you to the “Vendor” tab automatically.

Existing Vendor:

You can type a few characters of the vendor’s name in the “Vendor Name” box and select the button. If more than one page of vendors for your search selection exists, use the navigation arrows in the top left corner to scroll through the pages.

Select the vendor using the button beside the vendor’s name.

New Vendor:


If this is a new vendor, select the button and fill in the required fields. This puts in a request for the addition of this new vendor.

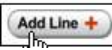
Name	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	Missouri
Zip Code	<input type="text"/>
<input type="button" value="Submit"/>	

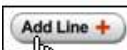
After vendor information is entered, this is the next screen, which permits updating of the fiscal year and addition of the location. You will only see one location unless you work for more than one location.



Name	NEW Vendor
Address	street address
City	City
State	Missouri
Zip Code	63114
Requisition Date	7/12/2010
Submit	<input type="checkbox"/>
Apply To	Current Fiscal Year
Location	--Select a Location--
Update ✓	

Click the  button, and the “Detail Lines” tab will open allowing you to begin adding lines for the requisition.

Click the  button to add a line item to your requisition. There is no limit to the number of lines you may add.

After selecting the  button the following screen will appear.


Catalog	ONLINE
Page Number	
Part Number	3883664a
Description	Description of line item
Notes	
Quantity	3
Unit	DOZ
Price	10.99
Room	--Select a Room--
Update ✓	



Fill out the appropriate fields with as much information as possible.

The unit drop down box is populated by the SISFin accounting system. If your unit is not represented see the accounting department.



If your room name or number is shown in the drop down menu in the “Room” field, choose it. If not, you are not using this feature at this time.

Click the  button and continue to add as many lines as you need.

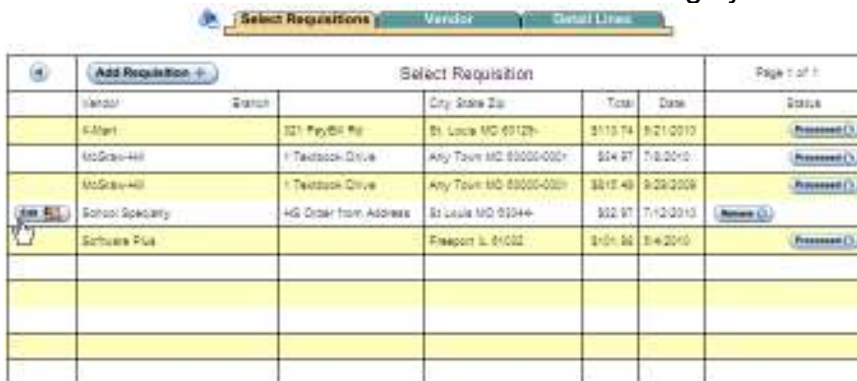
To submit this requisition click the . To add more lines items to this requisition, click .

Once submitted, the requisition is in SISFin waiting to be approved and added to a Purchase Order.






Requisition List

When a user clicks on the “Requisitions” link, they will see the requisitions they have entered, and the Status of those requisitions.




If a requisition’s status is blank then the requisition has been created in the Portal but not submitted to the actual SISFin Accounting system.






The screenshot shows a table with the following columns: Vendor, Search, Select Requisition, City, State, Zip, Total, Date, and Status. The table contains several rows of requisition data, each with a corresponding status button (e.g., Processed, Edit, Remove).

Vendor	Search	Select Requisition	City	State	Zip	Total	Date	Status
E-Merit		321 Payroll Pk	St. Louis	MO	63128	\$113.74	8/21/2012	
McGraw-Hill		1 Textbook Drive	Any Town	MO	63000-0000	\$54.97	7/8/2010	
McGraw-Hill		1 Textbook Drive	Any Town	MO	63000-0000	\$812.48	9/29/2008	
School Specialty		482 Order from Address	St Louis	MO	63344	\$22.97	7/12/2013	
Software Plus			Freeport	IL	61032	\$101.55	8/4/2010	

Select Edit then click the Submit button. The status column should now show for that requisition.

If an  button is present, the requisition has not been processed yet and can still be edited or removed. To make a change to the requisition select the  button. To remove the requisition, select the  button.

If a requisition has been turned into a Purchase Order the status will show as  and cannot be edited or removed from within the portal. You will need to contact Accounting if changes are required.

If a requisition status shows  the requisition has been rejected and will not be processed. You can remove this listing from your screen by selecting the  button.



Submitted means you have successfully entered the requisition and it now resides in SISFin awaiting approval.

To see the status of your requisitions, log in to the SISPortal and click Requisition link. The last column is the “Status” column.

 Requisitions Maintenance

Select Requisitions
Vendor
Detail Lines

Add Requisition +		Select Requisition					Page 1 of 1	
Vendor	Branch		City State Zip	Total	Date		Status	
McGraw-Hill		1 Textbook Drive	Any Town MO 63000-0001	\$815.45	9/29/2009		Processed	
 Pearson Education		8888 This Way	Anywhere MO 68999-5555	\$312.36	3/22/2010		Submitted	
 Software Plus		6580 E. Republic	Springfield MO 65807	\$129.99	3/23/2010		Submitted	

*****If your district has also purchased the Inventory module, please see the Inventory Manual posted on our support portal.*

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