



Payroll / HR Spooktacular

Thursday, October 30, 2014



Santa Clara County
Office of Education

Santa Clara County  Office of Education

AccessPoint Tips & Techie Tools

October 30, 2014

Presenter Information

Chris Dea

Applications Systems Analyst

Santa Clara County Office of Education

Chris_Dea@sccoe.org

(408) 453-4336



Goals

- Access Point
 - Tips on creating service requests
 - Training
- Techie Tools
 - Software to help you get things done
 - Learn something new
- Have Fun!



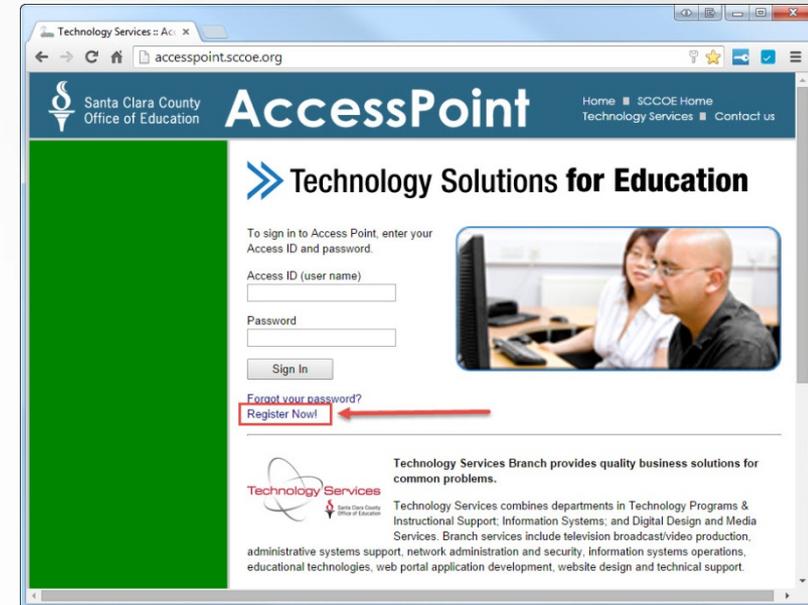
What is AccessPoint?

- Located at → accesspoint.sccoe.org
- Submit service requests (i.e. tickets) to get help when you have questions or problems related to QCC
- Sign up for QCC related training classes
- Access training documentation related to QCC



Registering for AccessPoint

- Go to:
accesspoint.sccoe.org
- Click **Register Now!**



Registering for AccessPoint (cont.)

» Create New Profile

Access ID: *

Password: *

re-enter Password: *

County: *

District: *

Site: *

Department:

First Name: *

Last Name: *

Job Title

Email: *

Telephone: * - -

Extension:

Fax: - -



Submitting a Service Request

- Login to your AccessPoint account
- Click **Service Request**

The screenshot shows the AccessPoint user interface. At the top, the Santa Clara County Office of Education logo is on the left, and the 'AccessPoint' title is in the center. On the right, there are links for 'Home' and 'Technology'. The left sidebar is green and contains the following sections:

- WELCOME, KERMIT**
 - Change my password
 - Sign out
- SYSTEMS**
 - Service Request** (highlighted with a red box and a red arrow pointing to it)
 - Report Center
 - WebMail
- RESOURCES**
 - Fiscal Year End
 - News and Bulletins
 - Training Materials

The main content area features a large blue double arrow icon followed by the text 'Welcome'. Below this is a paragraph: 'Welcome to AccessPoint, the customer service portal for the Technology Services Branch of the Santa Clara County Office of Education.' At the bottom, there is a 'Tweets' section with a 'Follow' button and a tweet from 'TSB @ SCCOE @TSBTRA' dated '26 Sep'.

Submitting a Service Request (cont.)

- Complete the Service Request form
- Click **Submit Request**

AccessPoint Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

[VIEW ALL TICKETS](#)

HELP DESK
SERVICE REQUEST

Type: QCC Category: Absence Tracking

Urgency: Standard High Critical

Description of Problem:
The ABT400 is not showing accruals in| October on some of my CI staff. Do you know why?
Thanks,
Kermit

[Submit Request](#) [Clear Form](#)

Attaching File to Service Request

- Attach file after clicking submit
- Click **Choose File**

Your information has been received

Service Request Number: 82223
Priority: Standard
Description: The ABT400 is not showing accruals in October on some of my C1 staff. Do you know why? Thanks, Kermit

Adding attachment:

1. Choose Attachment

i You can type the complete path of your attachment directly into the text box or click the browse button and search for your attachment.

Choose File No file chosen

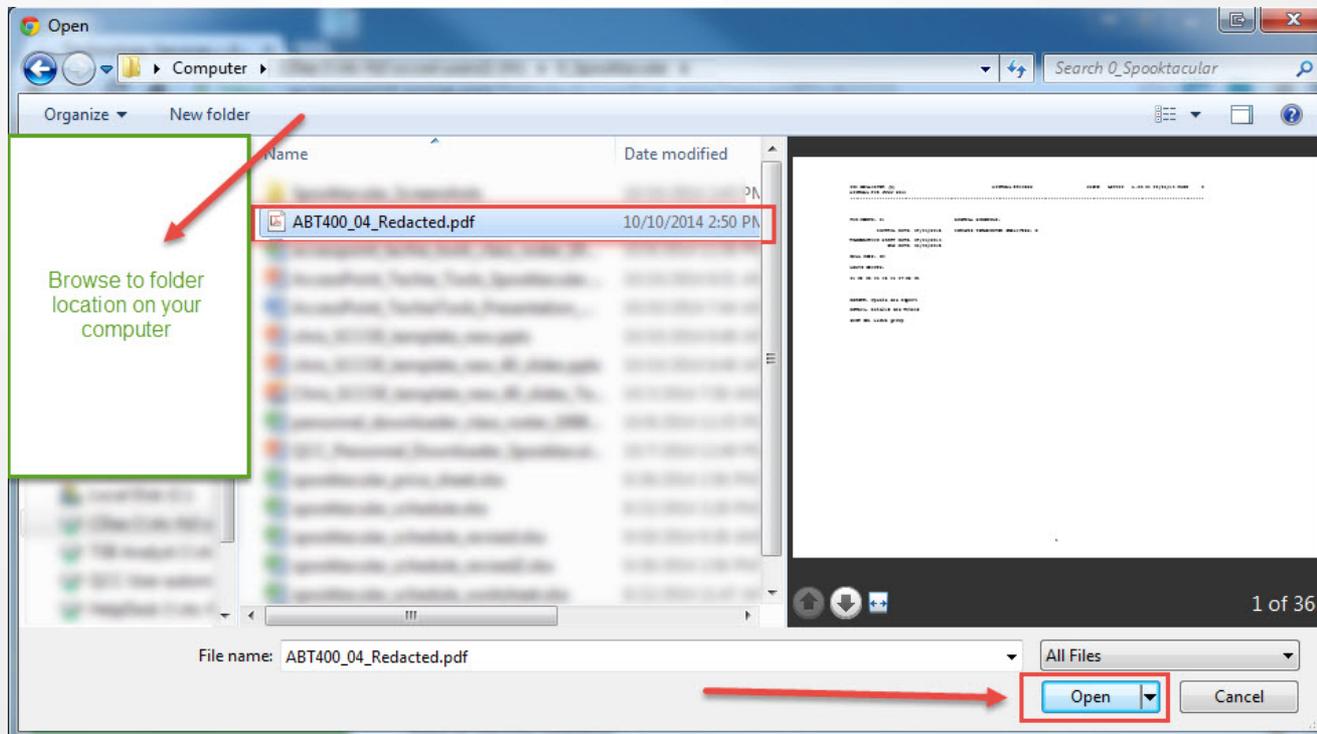
2. Attachment Details

	Size	Added On
--	------	----------

[Back to Service Requests](#)

Attaching File to Service Request (cont.)

- Browse to file
- Select the file on your computer and click **Open**



Attaching File to Service Request (cont.)

- Click **Add**

-The attachment will be put on request until you click Add button

Your information has been received

Service Request Number: 82223

Priority: Standard

Description: The ABT400 is not showing accruals in October on some of my C1 staff. Do you know why? Thanks, Kermit

Adding attachment:

1. Choose Attachment

 You can type the complete path of your attachment directly into the text box or click the browse button and search for your attachment.

Choose File

ABT400_04_Redacted.pdf

Add



2. Attachment Details

Size

Added On

[Back to Service Requests](#)



Attaching File to Service Request (cont.)

- File has now been attached to the request

Your information has been received

Service Request Number: 82223
Priority: Standard
Description: The ABT400 is not showing accruals in October on some of my C1 staff. Do you know why? Thanks, Kermit

Adding attachment:

1. Choose Attachment

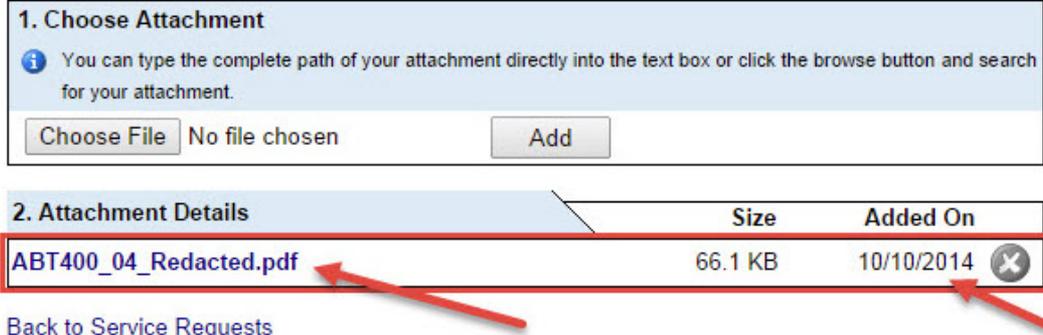
 You can type the complete path of your attachment directly into the text box or click the browse button and search for your attachment.

No file chosen

2. Attachment Details

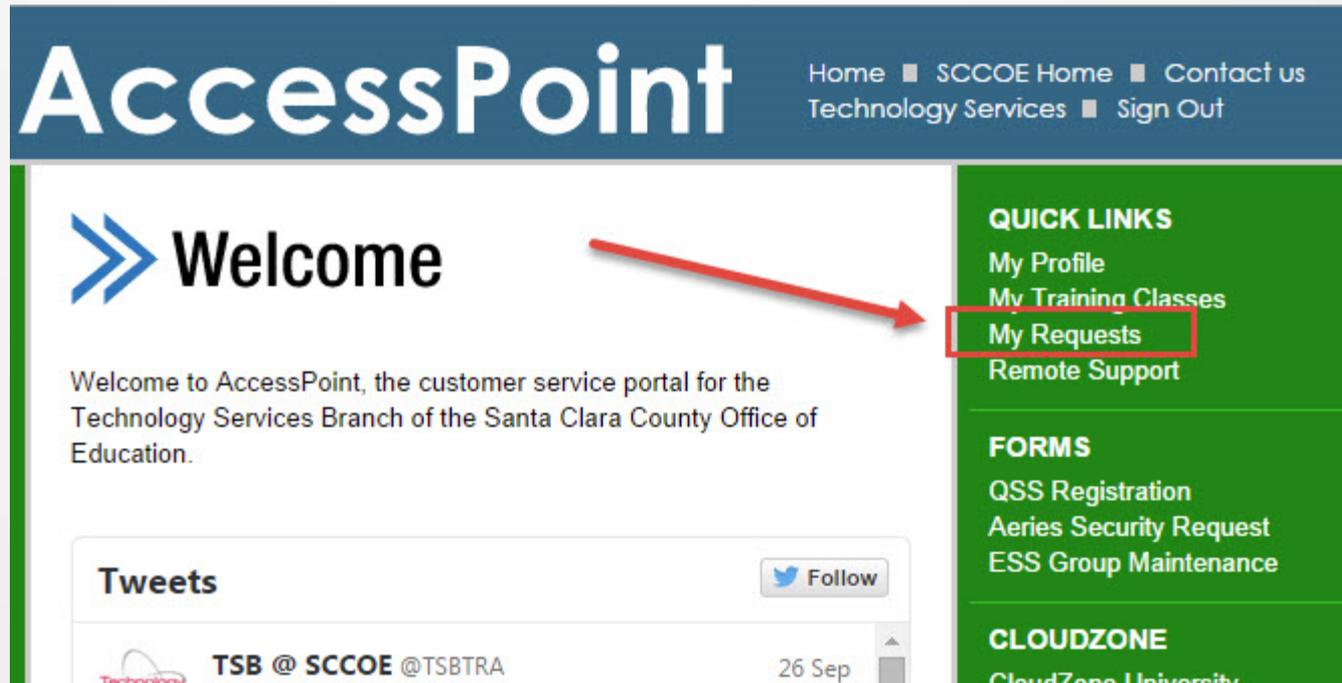
	Size	Added On
ABT400_04_Redacted.pdf	66.1 KB	10/10/2014 

[Back to Service Requests](#)



Adding to Existing Service Request

- While logged into AccessPoint, click the **My Requests** link



AccessPoint Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

» **Welcome**

Welcome to AccessPoint, the customer service portal for the Technology Services Branch of the Santa Clara County Office of Education.

QUICK LINKS
My Profile
My Training Classes
My Requests
Remote Support

FORMS
QSS Registration
Aeries Security Request
ESS Group Maintenance

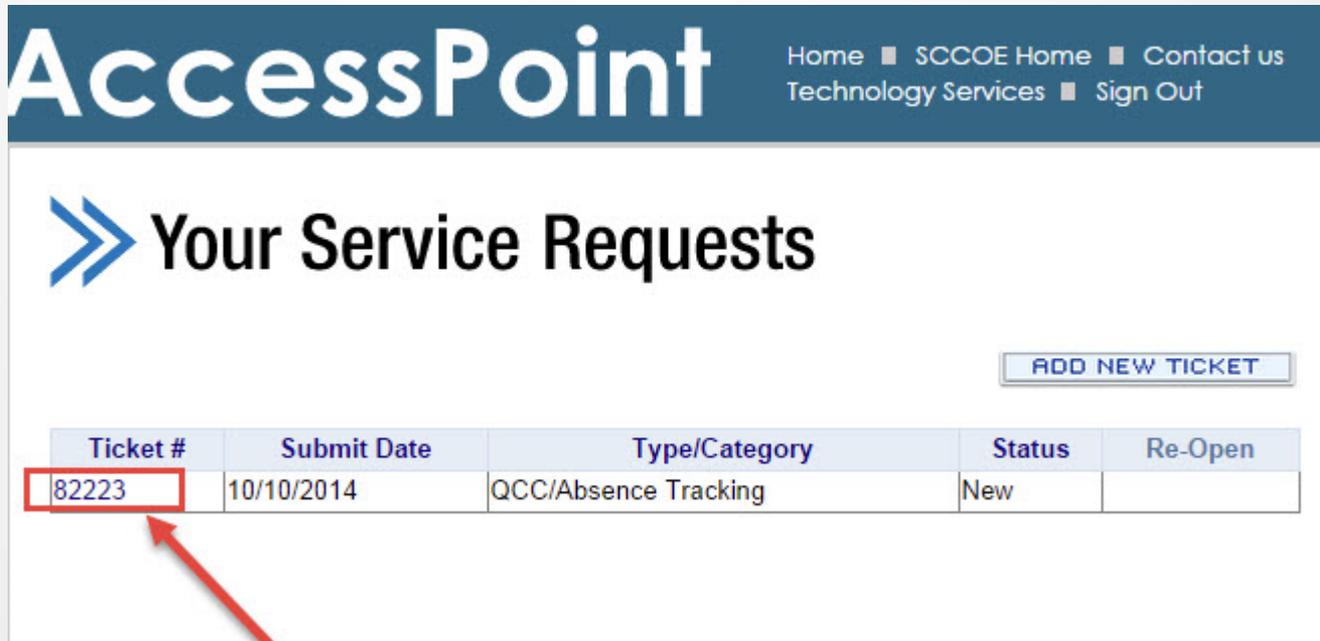
CLOUDZONE
CloudZone University

Tweets Follow

Technology TSB @ SCCOE @TSBTRA 26 Sep

Adding to Existing Service Request (cont.)

- Click the Service Request number



The screenshot shows the AccessPoint web interface. At the top, there is a navigation bar with the AccessPoint logo and links for Home, SCCOE Home, Contact us, Technology Services, and Sign Out. Below the navigation bar, the main heading is "Your Service Requests" with a blue double arrow icon. To the right of the heading is a button labeled "ADD NEW TICKET". Below the heading is a table with the following columns: Ticket #, Submit Date, Type/Category, Status, and Re-Open. The first row of the table contains the following data: Ticket # 82223, Submit Date 10/10/2014, Type/Category QCC/Absence Tracking, Status New, and Re-Open. The ticket number 82223 is highlighted with a red box, and a red arrow points to it from the bottom left.

Ticket #	Submit Date	Type/Category	Status	Re-Open
82223	10/10/2014	QCC/Absence Tracking	New	

Adding to Existing Service Request (cont.)

You can add...

- **Notes**
 - You can add a note using the **Add notes** box and click **Submit**
- **Attachments**
 - You can attach a file using the **Choose File** and **Add** buttons

[VIEW ALL TICKETS](#) [ADD NEW TICKET](#)

HELP DESK
SERVICE REQUEST

SERVICE REQUEST INFO.

Service Request No: 82223

Category/Type: Absence Tracking/QCC
Date Submitted: 10/10/2014 2:44:49 PM
Full Description: The ABT400 is not showing accruals in October on some of my C1 staff. Do you know why? Thanks, Kermit
Priority: Standard
Status: New

HISTORY AND NOTES

Add notes:

10/10/2014 2:44:49 PM: New service request automatically assigned to *Application Support based on auto-assign rule.

ATTACHMENTS

Adding attachment:

1. Choose Attachment

You can type the complete path of your attachment directly into the text box or click the browse button and search for your attachment.

No file chosen

2. Attachment Details

	Size	Added On
ABT400_04_Redacted.pdf	66.1 KB	10/10/2014



What Should I Include on a Service Request?

- A detailed description
 - Help us help you
- “The devil is in the details...”
 - Be specific, when possible
 - Tell us what steps you tried
 - Did you see any errors?
 - What was your goal or what task were you trying to complete?

Some example requests

Description of Request:

Just sent in an email with an attachment. This is really weird. Never seen this before.

Description of Request:

Need to complete position rollover.

Description of Request:

the recalculate button is not working

More example requests

Description of Request:

When checking the "Primary" check box in Employee Maintenance , an error pops up stating "An exception has occurred in the program".

Screen shots are attached.

Description of Request:

I'm in the vault and I did a search and at the bottom it shows 8 matches. I understand there is supposed to be another box that shows the 8 matches and I am supposed to be able to click on them to bring up that person but I don't have that box. Is this a "setup" problem? How do I access the matches?

Description of Request:

Will running the PER804ST job (Reset Calendar Relationships) update work days on EA screens? I found an error on a calendar that was rolled into FY15 which is causing the salaries to calculate with more days than it should be. I've fixed the calendar but all of the positions still have the old (incorrect) number of work days.



Attach Supporting Files

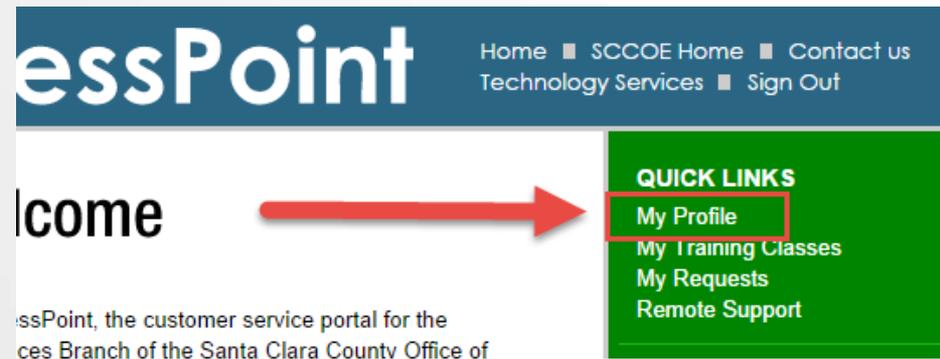
- Copy of report or documents related to your problem or request
- Screenshot(s) showing the problem
 - “A picture says a thousand words...”
 - Shows us exactly where a problem occurred and what happened



Updating your Access Point Profile

- Click **My Profile**

- Update information
- Click **Update** button



AccessPoint

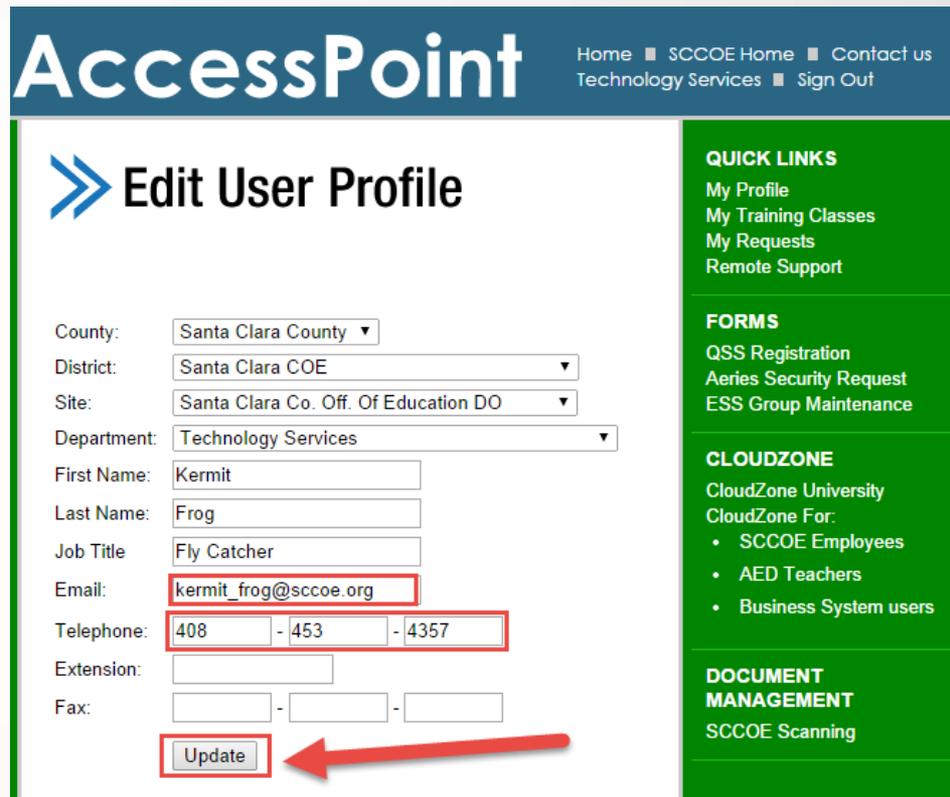
Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

Welcome

QUICK LINKS

- My Profile**
- My Training Classes
- My Requests
- Remote Support

AccessPoint, the customer service portal for the
Technology Services Branch of the Santa Clara County Office of Education



AccessPoint

Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

» Edit User Profile

QUICK LINKS

- My Profile
- My Training Classes
- My Requests
- Remote Support

FORMS

- QSS Registration
- Aeries Security Request
- ESS Group Maintenance

CLOUDZONE

- CloudZone University
- CloudZone For:
 - SCCOE Employees
 - AED Teachers
 - Business System users

DOCUMENT MANAGEMENT

- SCCOE Scanning

County:

District:

Site:

Department:

First Name:

Last Name:

Job Title:

Email:

Telephone: - -

Extension:

Fax: - -

Changing AccessPoint Password

- Click **Change my password**
- Change



Santa Clara County Office of Education

AccessPoint

WELCOME, KERMIT

- Change my password
- Sign out

SYSTEMS

- Service Request
- Report Center
- WebMail

» Welcome

Welcome to AccessPoint, the customer service Technology Services Branch of the Santa Clara Education.



AccessPoint

Home Techno

» Change Password

Enter your old password and then choose your new password. Click Submit when you're done.

Enter Old Password:

Choose a New Password:

Confirm New Password:

Training Classes

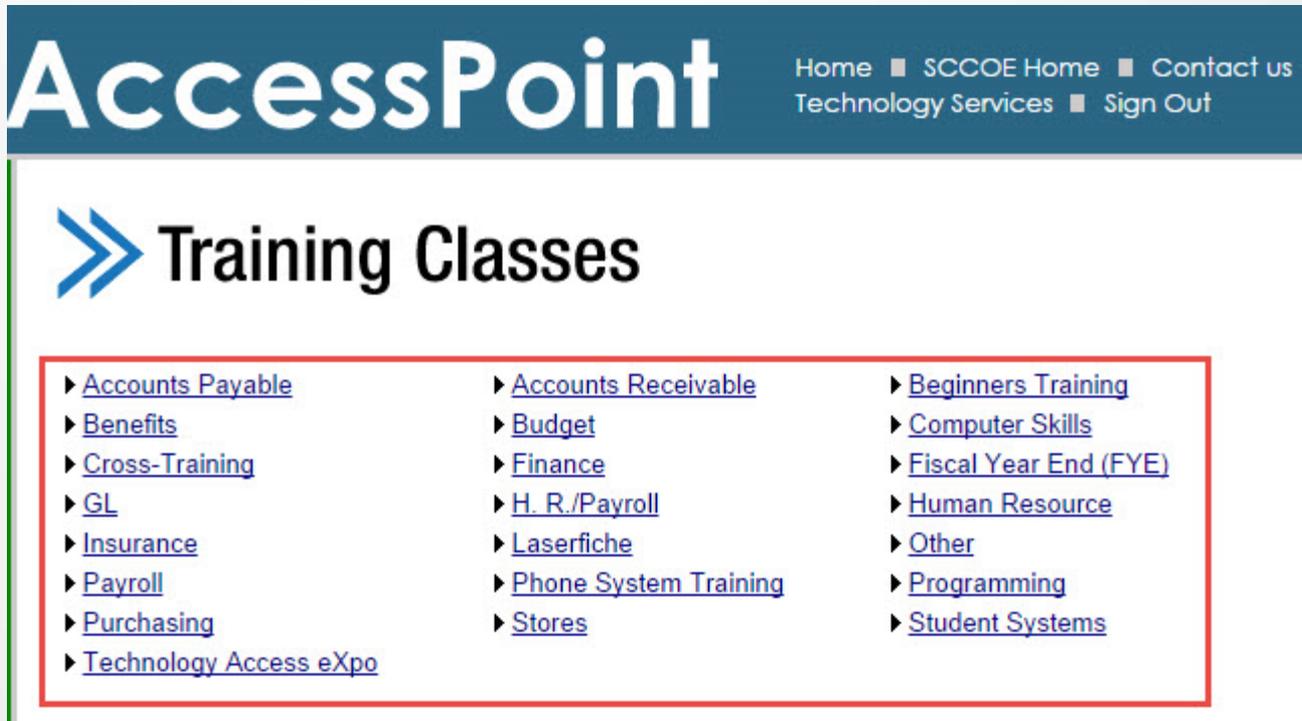
- While logged into AccessPoint, click **Training Classes**

The screenshot displays the AccessPoint website interface. On the left, a green sidebar contains a navigation menu with the following sections: 'Service Request Report Center WebMail', 'RESOURCES' (Fiscal Year End, News and Bulletins, Training Materials, Desktop Applications Training), 'TRAININGS' (Training Classes, Training Survey), and 'DOWNLOADS'. The 'Training Classes' link is highlighted with a red box, and a red arrow points to it from the right. The main content area shows the 'Technology Services Branch of the Santa Clara County Office of Education.' Below this is a 'Tweets' section with a 'Follow' button. Two tweets are visible: one from 'TSB @ SCCOE @TSBTRA' dated '26 Sep' with the text 'Please register for the HR\Payroll Spooktacular at bit.ly/tsbspooktacular Information and Fun!', and another from the same account dated '20 Jun' with the text 'Printing of Direct Deposit can be suppressed by pay location :)'. The 'Technology Services' logo is visible next to each tweet.



Training (cont.)

- Browse the various categories of training



The screenshot shows the AccessPoint website interface. At the top, the 'AccessPoint' logo is on the left, and navigation links for 'Home', 'SCCOE Home', 'Contact us', 'Technology Services', and 'Sign Out' are on the right. Below the header, a blue arrow icon points to the 'Training Classes' section. A red-bordered box contains a list of training categories, each preceded by a blue arrow icon.

AccessPoint Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

» Training Classes

- ▶ [Accounts Payable](#)
- ▶ [Accounts Receivable](#)
- ▶ [Beginners Training](#)
- ▶ [Benefits](#)
- ▶ [Budget](#)
- ▶ [Computer Skills](#)
- ▶ [Cross-Training](#)
- ▶ [Finance](#)
- ▶ [Fiscal Year End \(FYE\)](#)
- ▶ [GL](#)
- ▶ [H. R./Payroll](#)
- ▶ [Human Resource](#)
- ▶ [Insurance](#)
- ▶ [Laserfiche](#)
- ▶ [Other](#)
- ▶ [Payroll](#)
- ▶ [Phone System Training](#)
- ▶ [Programming](#)
- ▶ [Purchasing](#)
- ▶ [Stores](#)
- ▶ [Student Systems](#)
- ▶ [Technology Access eXpo](#)

Training (cont.)

- Pick a class and click **Register Now**

QCC Financial FYE (AP, PO & Non-Invoice AR)

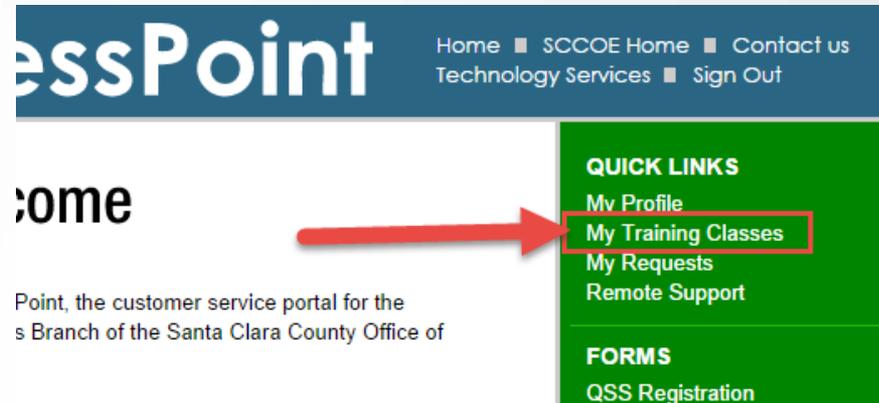
Category: Finance
Level: Int/Adv
Date: 5/8/2015
Time: 9:00 am - 12:00 pm
Location: San Jose Room
Register By:: 5/1/2015
Class Memo: This workshop is jointly trained by DBAS and TSB. It will focus on the fiscal year end processes and the use of QCC Finance programs to run fiscal year end processing for Accounts Payable, Purchase Orders and setting up non-Invoicing Accounts Receivable transactions.

[Register Now](#)



Managing your Training Classes

- Click **My Training Classes**



AccessPoint Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

Home

Point, the customer service portal for the
s Branch of the Santa Clara County Office of

QUICK LINKS
My Profile
My Training Classes
My Requests
Remote Support

FORMS
QSS Registration

- Click **Cancel**



AccessPoint Home ■ SCCOE Home ■ Contact us
Technology Services ■ Sign Out

» **My Training Classes**

Click on the title of the class for more details or to cancel your registration.

Title	Date	Time	Location	On Wait list	
QCC Personnel Downloader	01/14/2015	9:00 am - 2:00 pm	Los Gatos Lab, TSB	Yes	Cancel

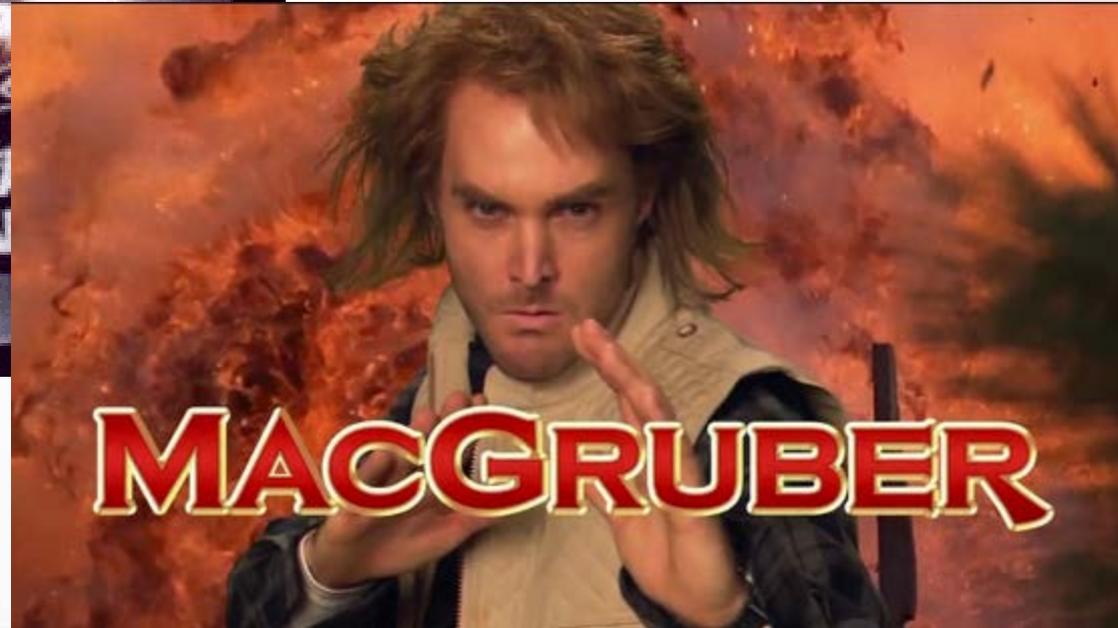
And now for something different...



Techie Tools



Problem Solving Approach



Jugaad

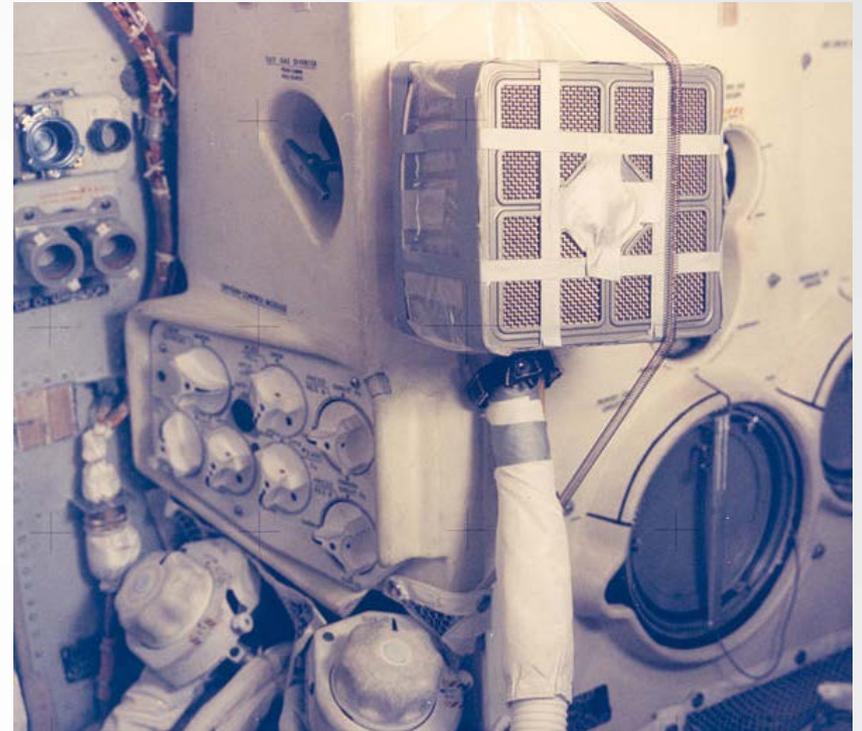
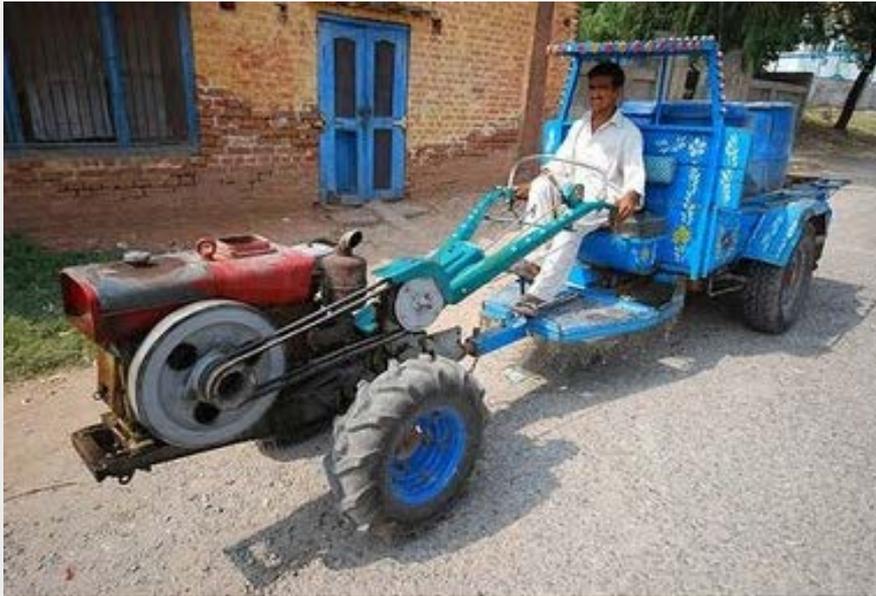
- Term originated in India

“...a habit of mind, born out of historical scarcity and an environment of uncertainty, which emphasizes ad hoc improvisation and flexibility as a way of getting things done....”

“...enables people to come up with quick, innovative and low-cost ways of solving problems, and to make something work even when conventional wisdom says it isn't possible...”

- Doing more, with less

Jugaad Examples



Public Service Announcement

- Check with your district IT dept. before installing any new programs
- When in doubt, ask
- No such thing as too careful



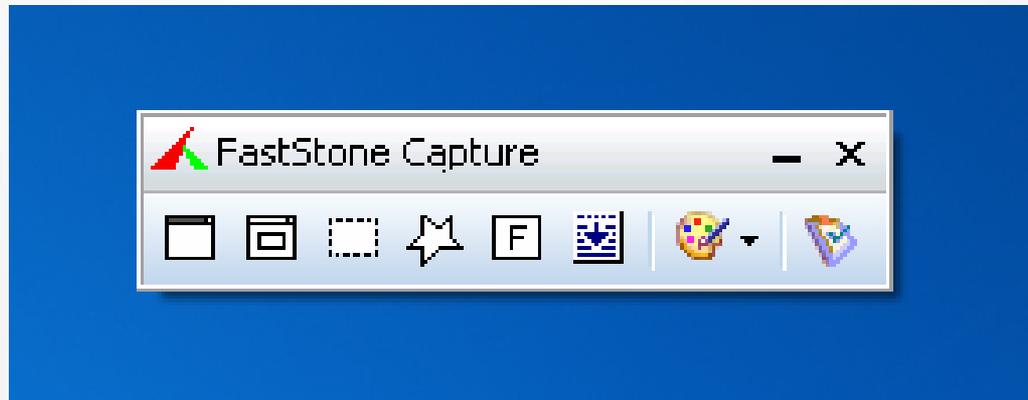
FastStone Capture

- Tool for taking screenshots
- Easy to use
- Good for capturing errors or problems when using programs or websites
- And...**FREE**



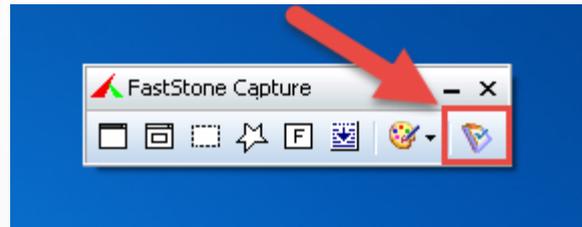
FastStone Capture – Set Up

- Just drop the program .exe file somewhere on your computer (**FSCapture.exe**)
- Navigate to the folder where you put the .exe and double-click to run it.
- FastStone will launch



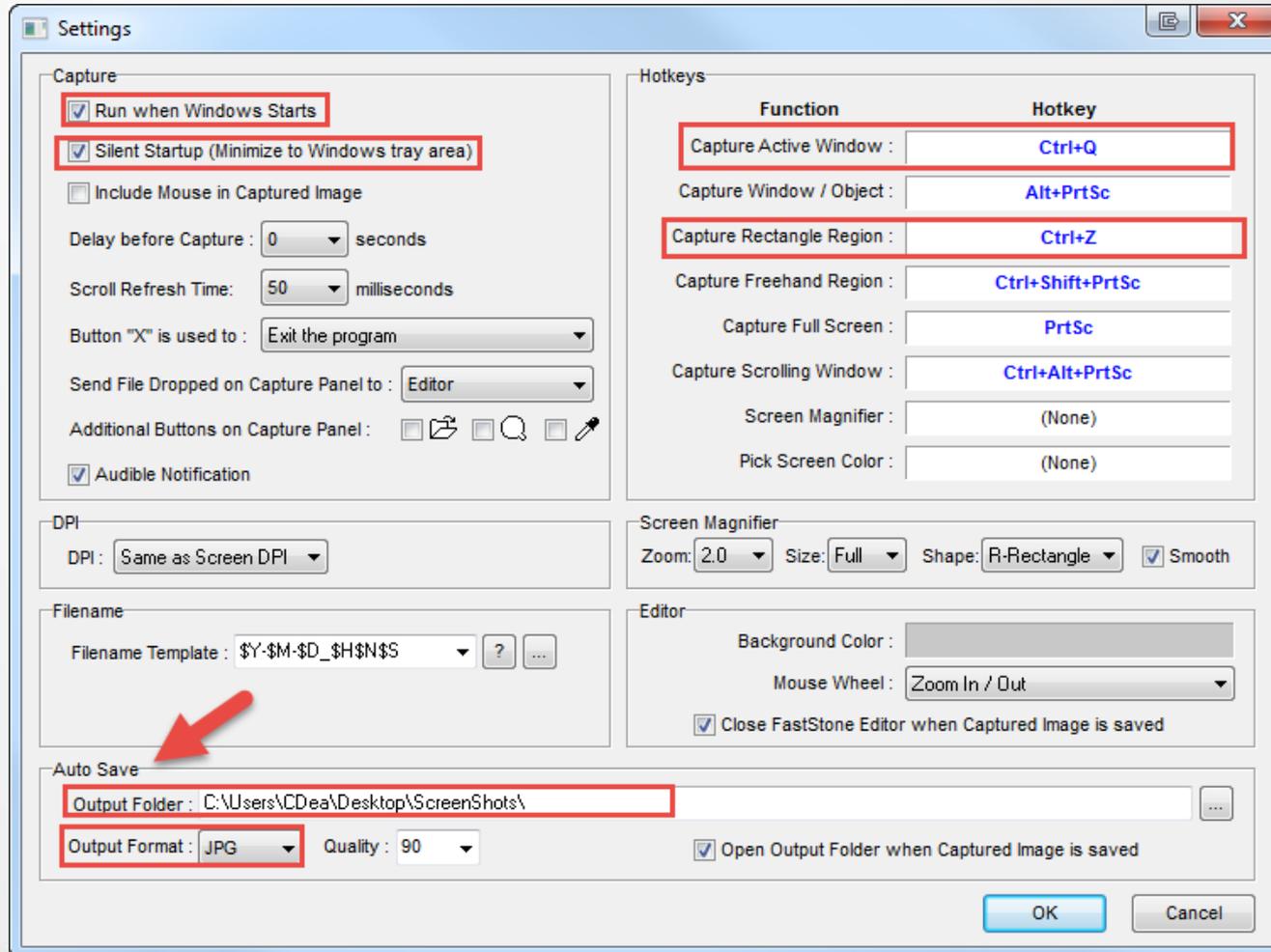
FastStone Capture – Set Up (cont.)

- Click the **Settings** button from the FastStone Capture toolbar



FastStone Capture – Set Up

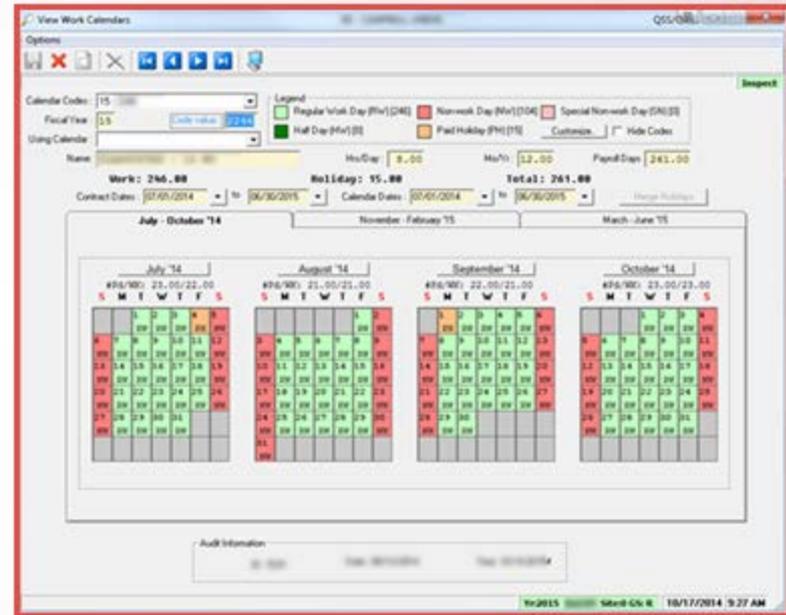
- Recommended settings



FastStone Capture – Capturing a Screen

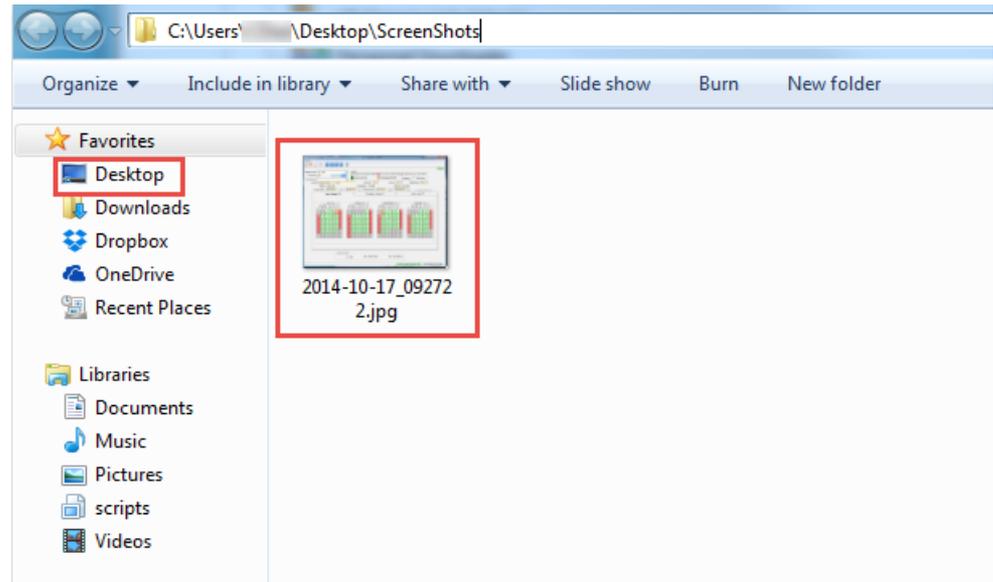
Example of capturing
active window

- Open program and click on the window that you want to focus on
- Press “CTRL+Z” (shortcut set to capture active window)
- Screenshot was automatically saved to “Screenshots” folder



FastStone Capture – Capturing a Screen (cont.)

- Browse to the folder where the screenshot was saved (“Screenshots” folder on Desktop)
- JPEG file will be in the folder
- Attach file to service request, email, use in documentation



Launchy

- “Launchy” is a free cross-platform utility designed to help you forget about your start menu, the icons on your desktop, and even your file manager. Launchy indexes the programs in your start menu and can launch your documents, project files, folders, and bookmarks with just a few keystrokes!”
- Allows you to launch programs or open files just using the keyboard

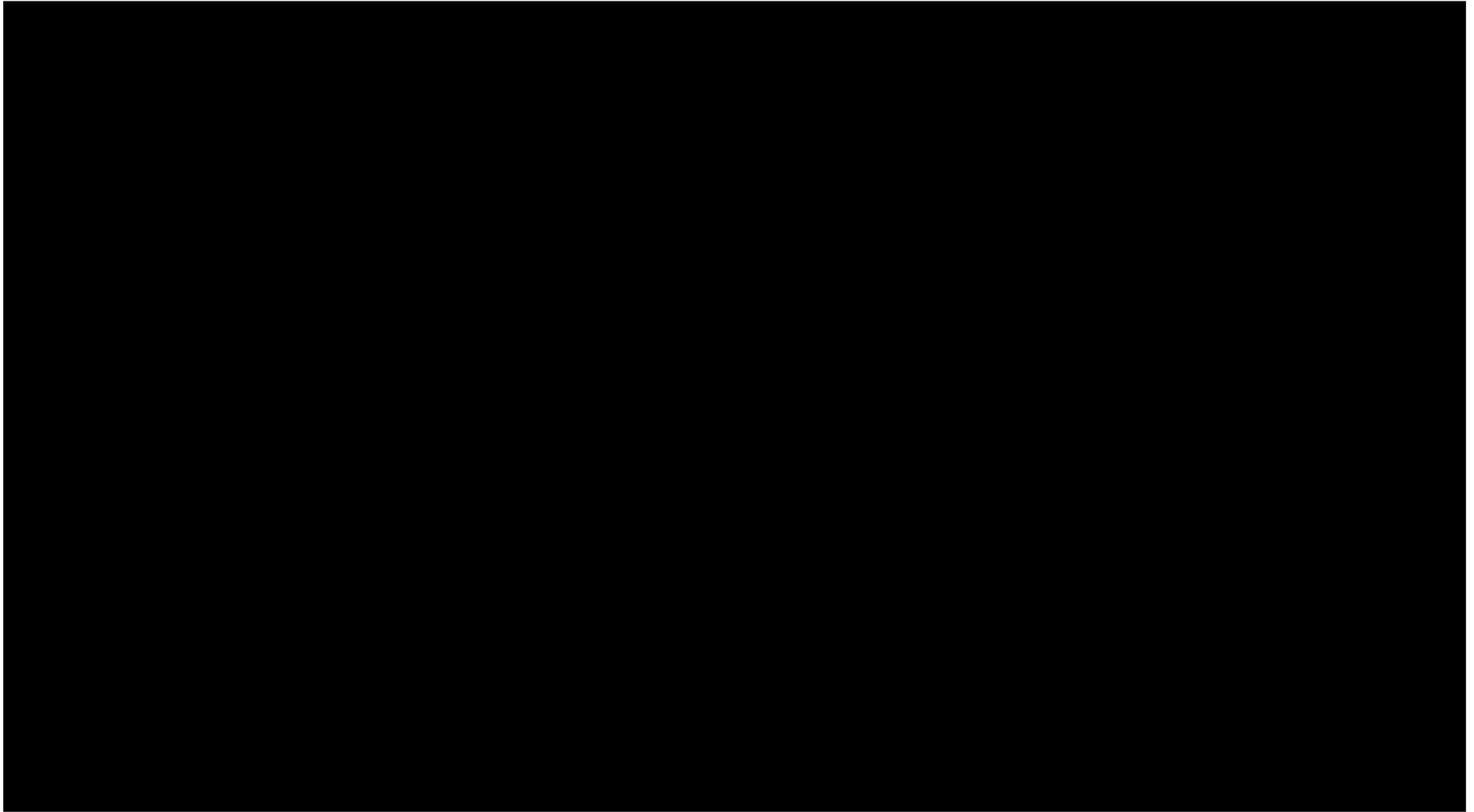
Launchy in action



Wunderlist

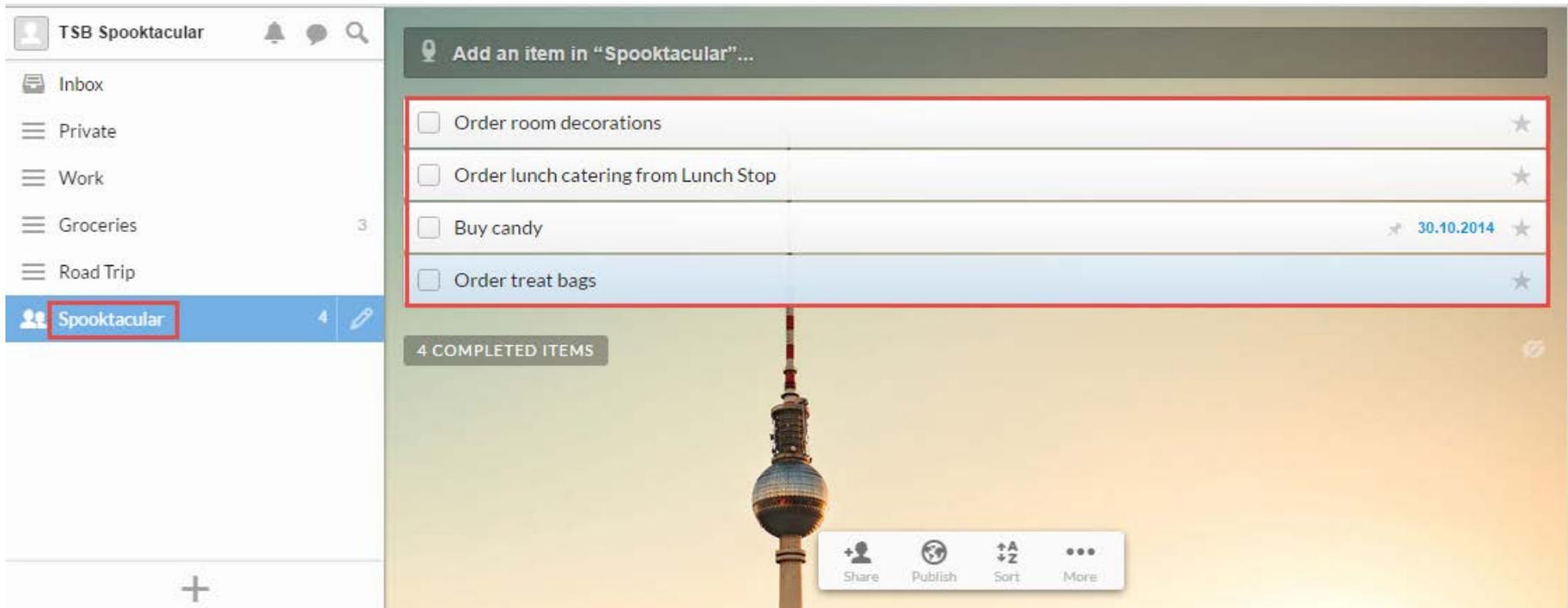
- An to-do list manager
- Allows to you create lists, update them, and have changes synchronize across all devices (web, iPhone, Android, Mac)
- Share lists with co-workers, family, friends

Wunderlist Video



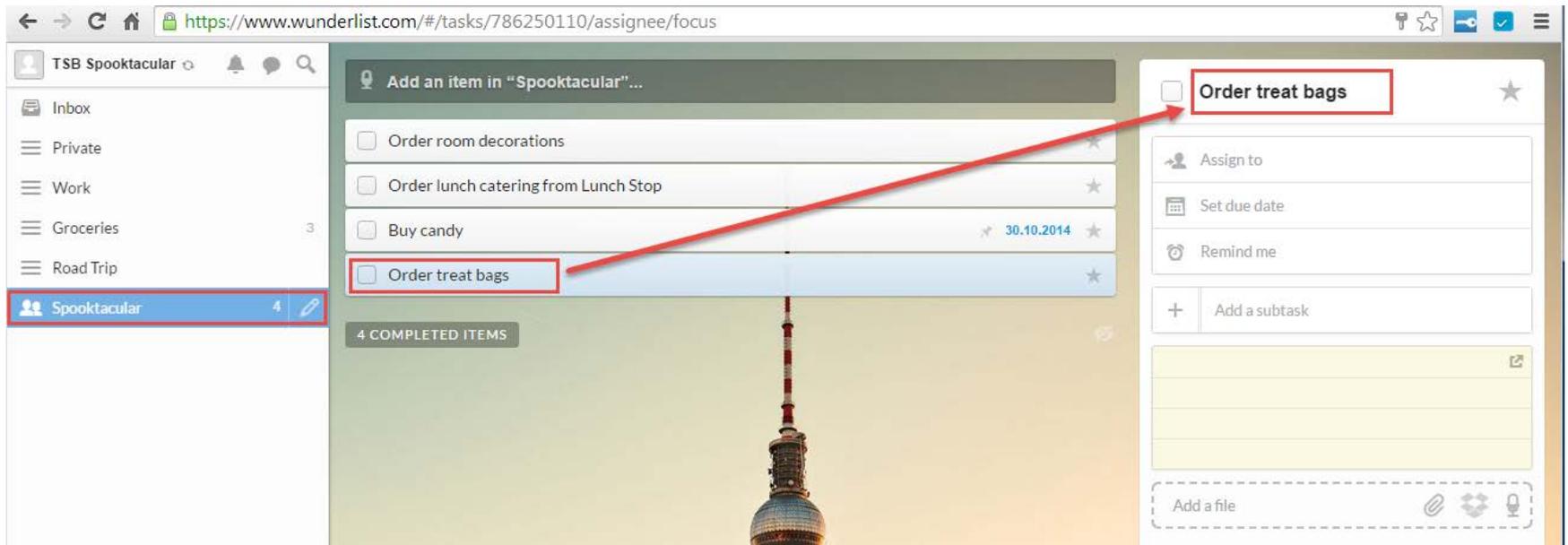
Wunderlist

- Main window (web)



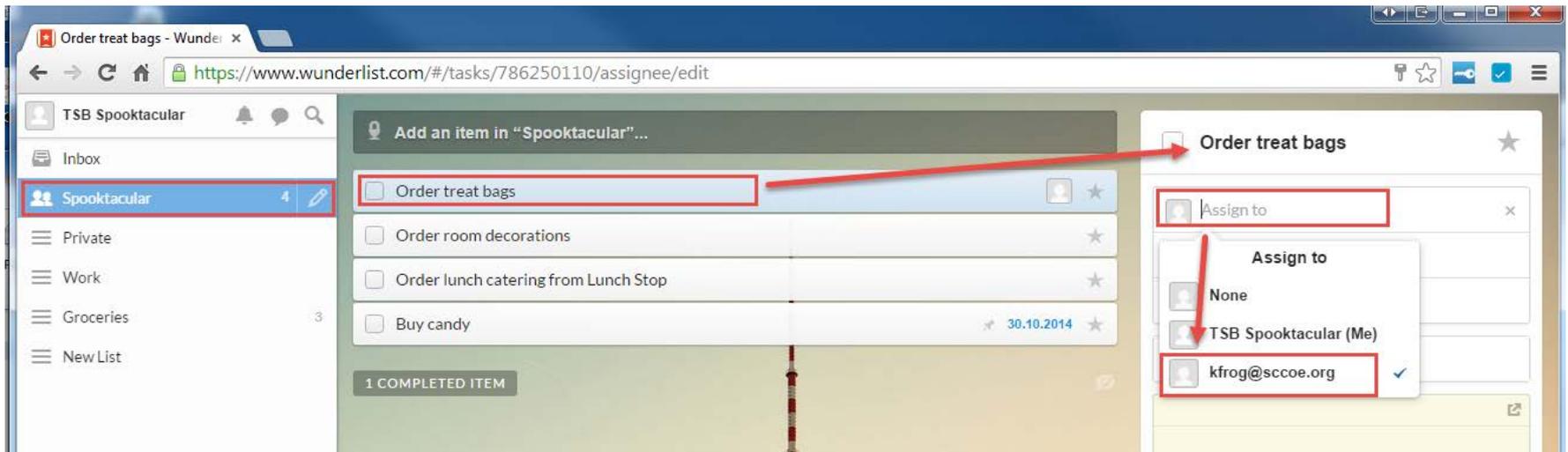
Wunderlist – list management

- Double-click an items/task to edit it



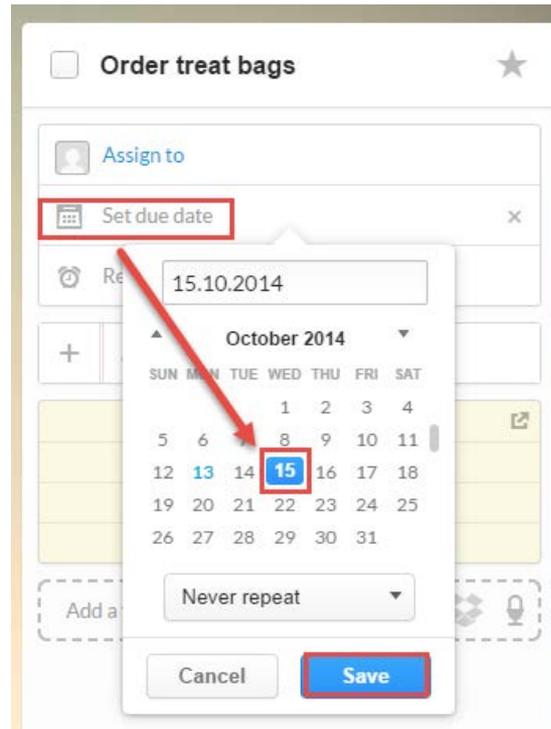
Wunderlist – list management

- Assign tasks to people



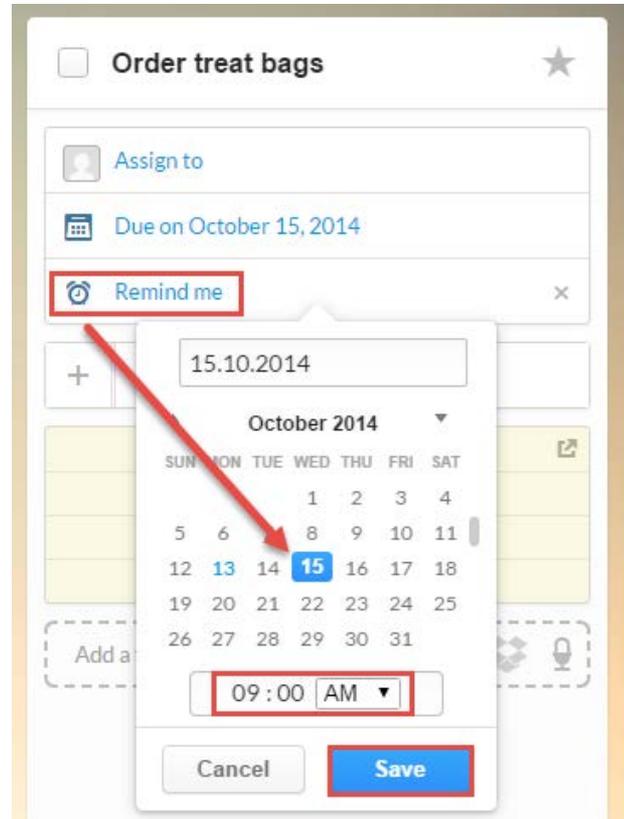
Wunderlist – list management (cont.)

- Set a due date for a task



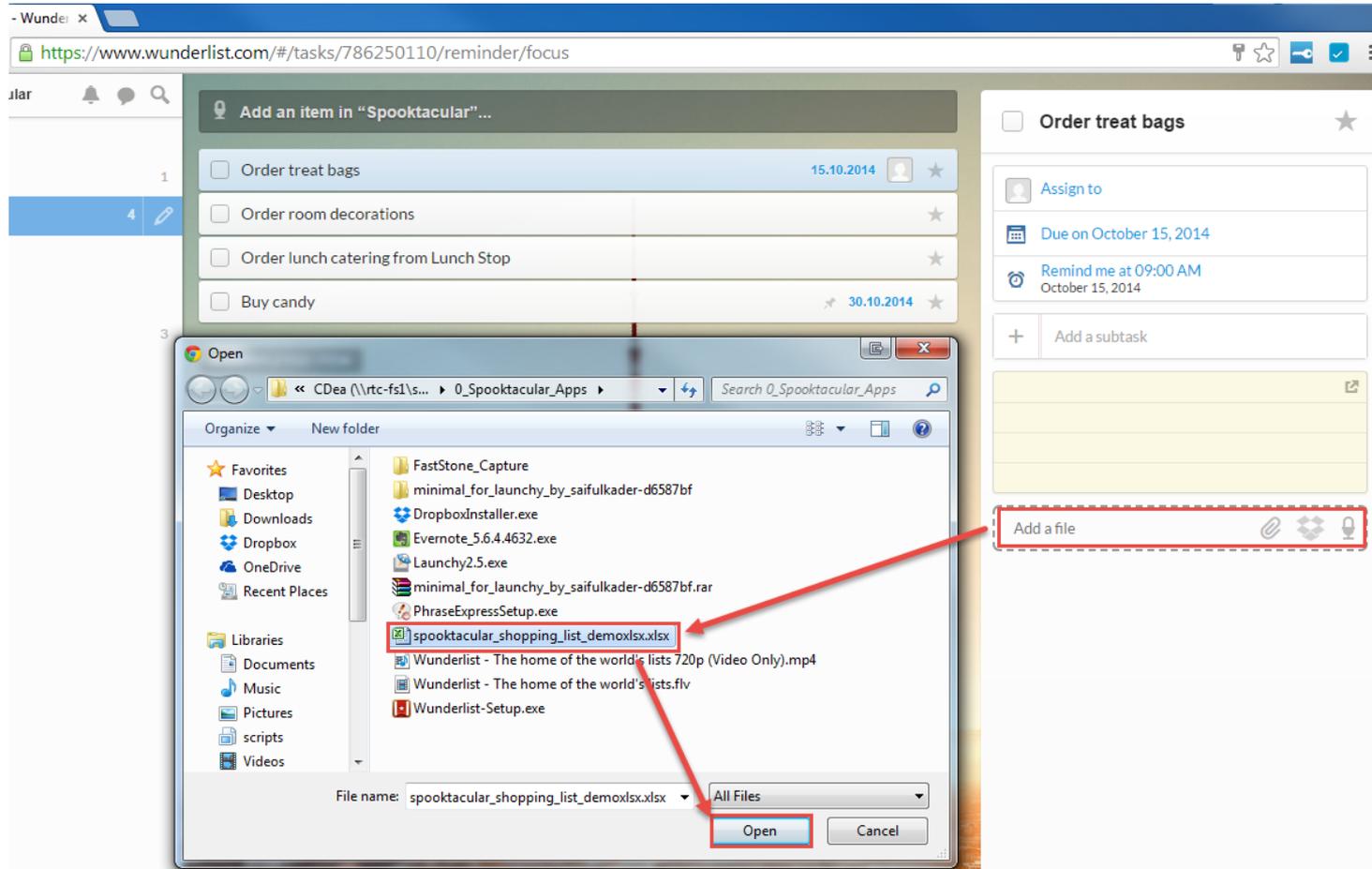
Wunderlist – list management (cont.)

- Set a reminder



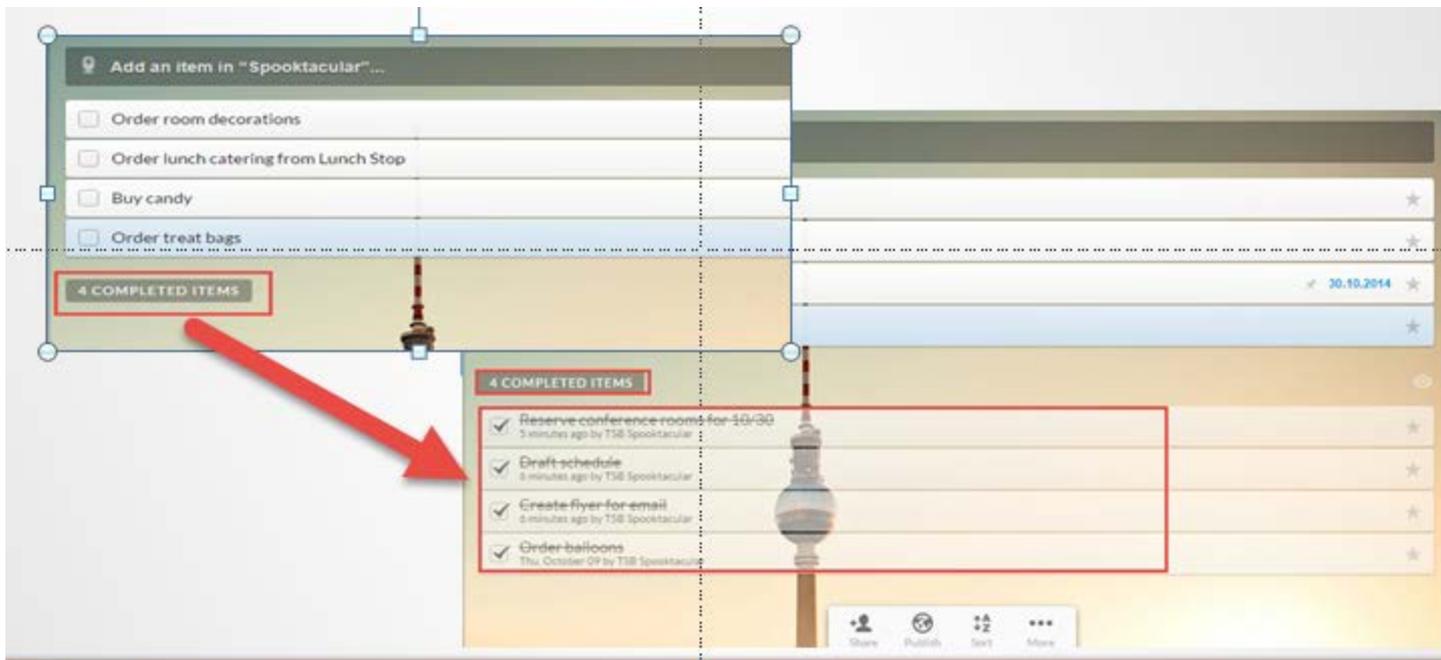
Wunderlist – list management (cont.)

- Attach a file to a list item



Wunderlist – list management (cont.)

- Viewing completed items



PhraseExpress

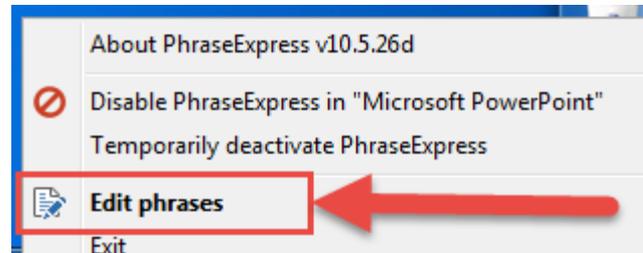
- Text expansion
 - Replace a short text snippet with another portion of text
- Eliminates need to repetitively type the same phrases or words
- Especially good if you write a lot of email or if you correspond often in written form

PhraseExpress Initial Configuration

- Right-click PhraseExpress icon on system tray

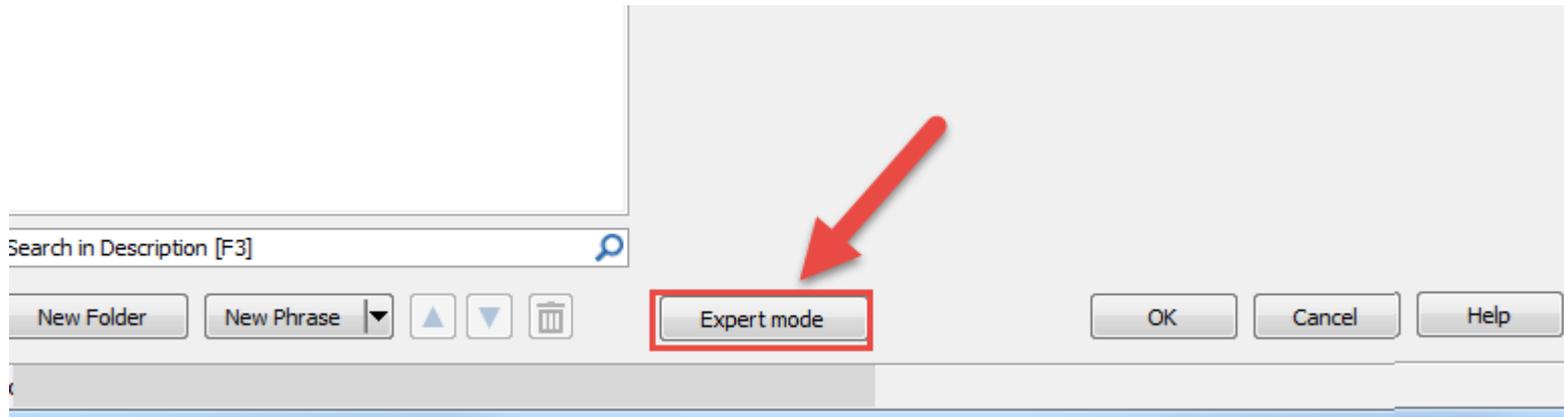


- Select **Edit phrases** to configure PhraseExpress

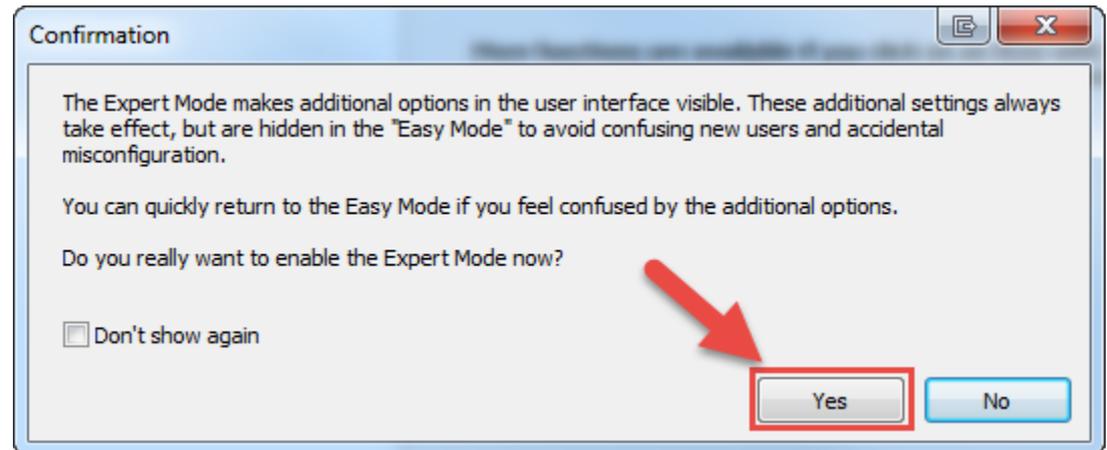


PhraseExpress Initial Configuration (cont.)

- Click the **Expert** mode button



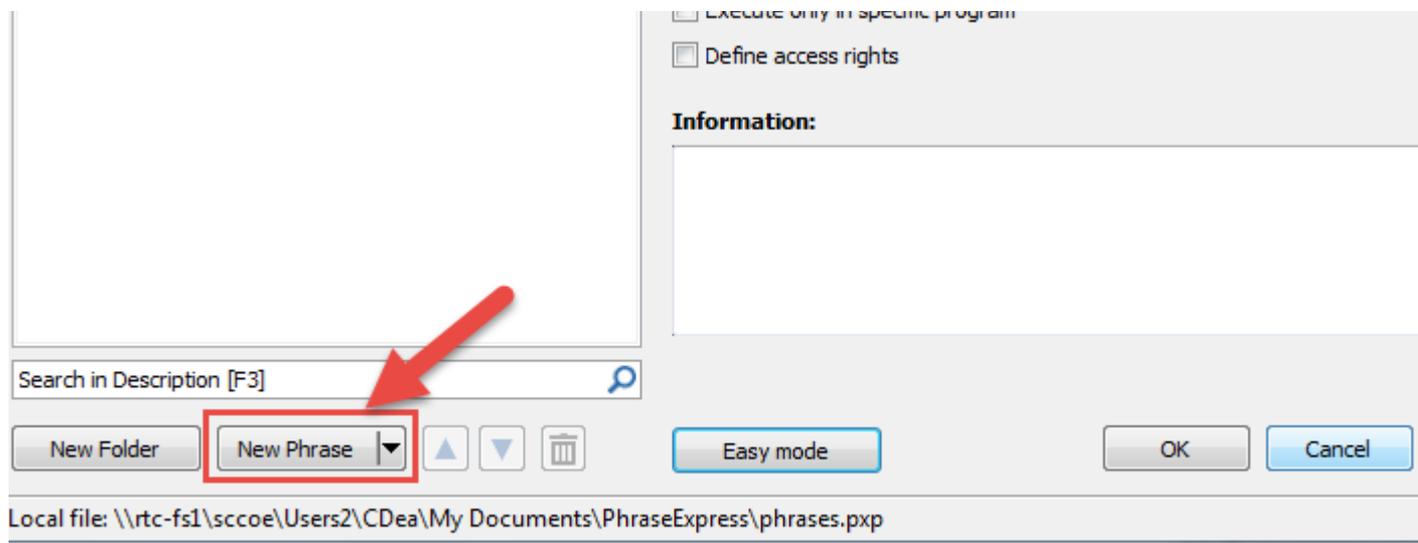
- Click **Yes** on the **Confirmation** window



Adding your first phrase

Example of adding an email signature phrase

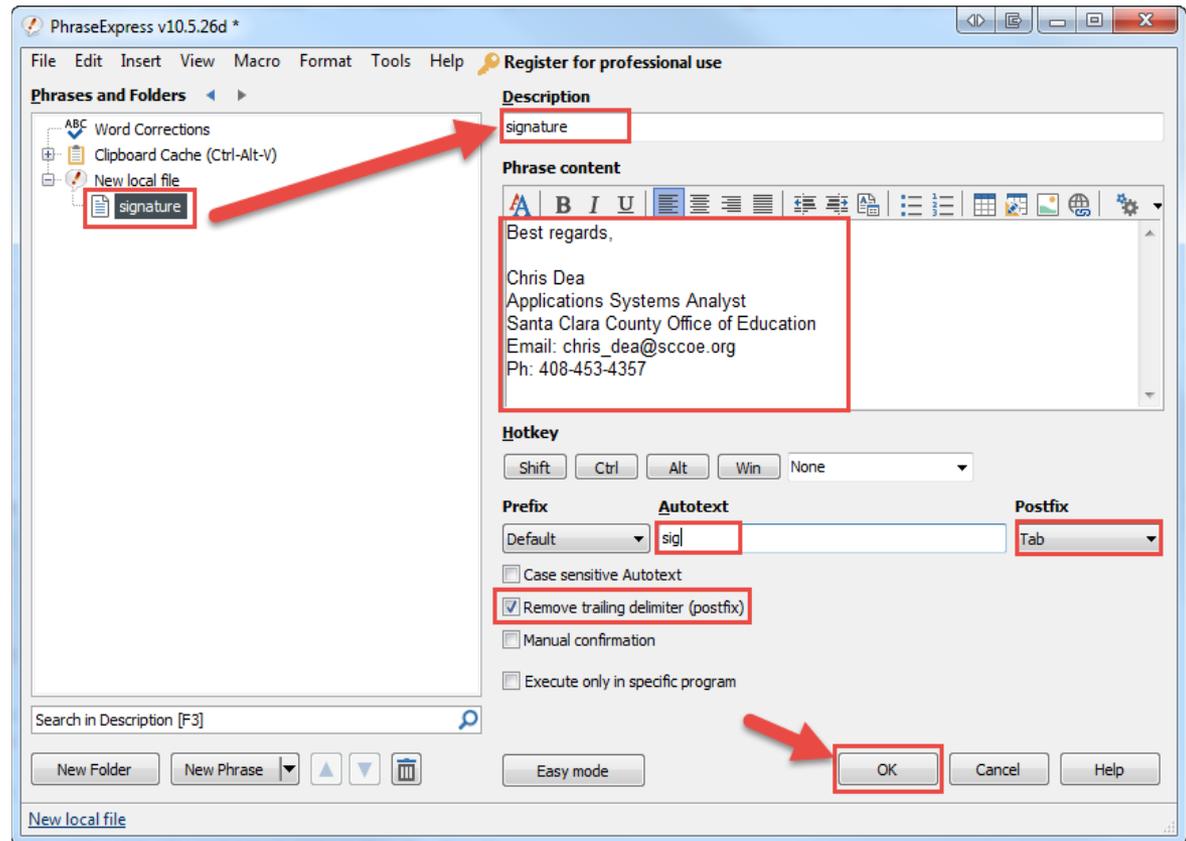
- Click the **New Phrase** button



Adding your first phrase (cont.)

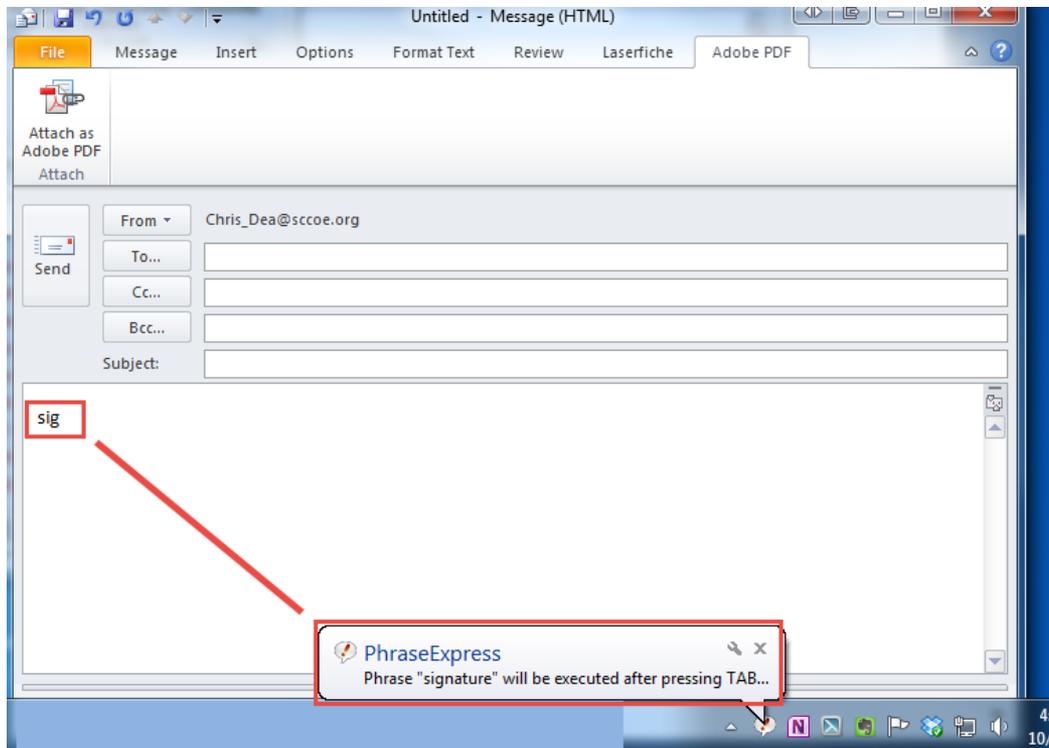
Enter your phrase:

- Description
- Phrase content
- Autotext
- Postfix (i.e. Tab)
- Select Remove trailing delimiter (postfix) option
- Click OK



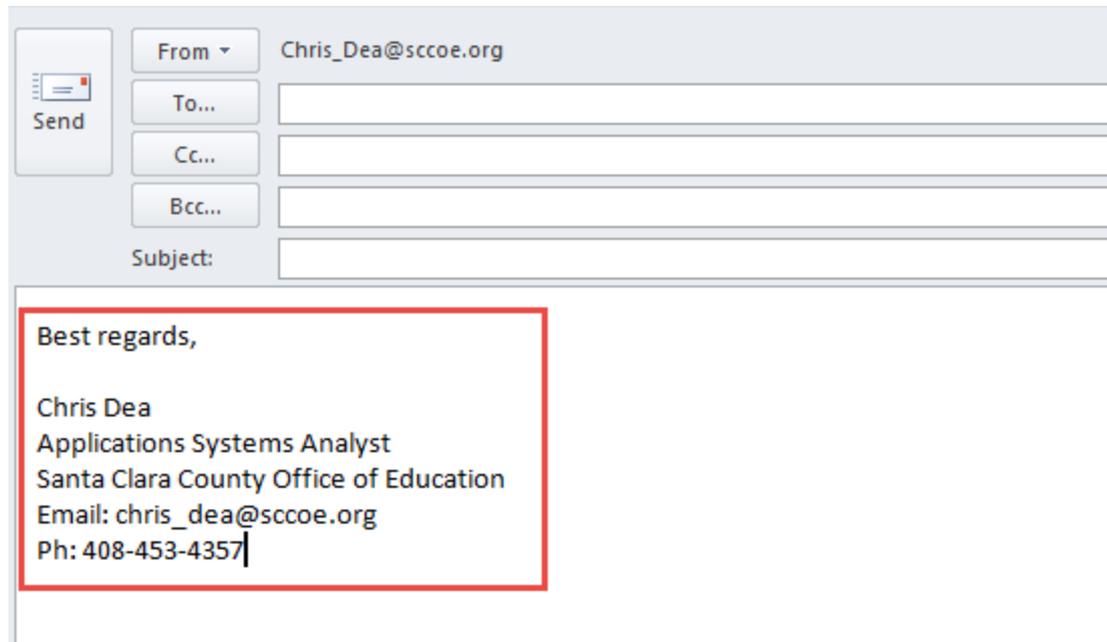
Testing your first phrase

- Create a new message in Outlook
- Type the Autotext "sig" in the body
 - *PhraseExpress will show a notification confirming it recognized the Autotext*



Testing your first phrase (cont.)

- Hit the corresponding **Postfix (Tab)** to insert your **Phrase content**
- That's all there it to it!



The image shows a screenshot of an email composition interface. The header area includes a 'Send' button with a paper plane icon, and fields for 'From' (Chris_Dea@sccoe.org), 'To...', 'Cc...', and 'Bcc...'. Below these is a 'Subject:' field. The main body of the email contains a signature block, which is highlighted with a red rectangular border. The signature text is as follows:

Best regards,

Chris Dea
Applications Systems Analyst
Santa Clara County Office of Education
Email: chris_dea@sccoe.org
Ph: 408-453-4357

Situations where PhraseExpress Can be Useful

- **Responding to customers**
 - Have a phrase for salutations or greetings you frequently use
- **Filling out online forms**
 - Have a **phrase** for your entering your dept., phone number, email address, title, address, or anything you type over and over
- **Writing form letters**
 - Have a **phrase** for standard paragraphs or sentences you use often
- **Many, many uses...**
 - If you find yourself type something over and over, make it into a **phrase** in PhraseExpress

Dropbox

- Motto: "Your stuff, anywhere"
- 2 GB storage included with Free account
- Synchronize files across all devices (computer, phone, tablets)
- Backup files in the "cloud"
- No USB drive, no problem

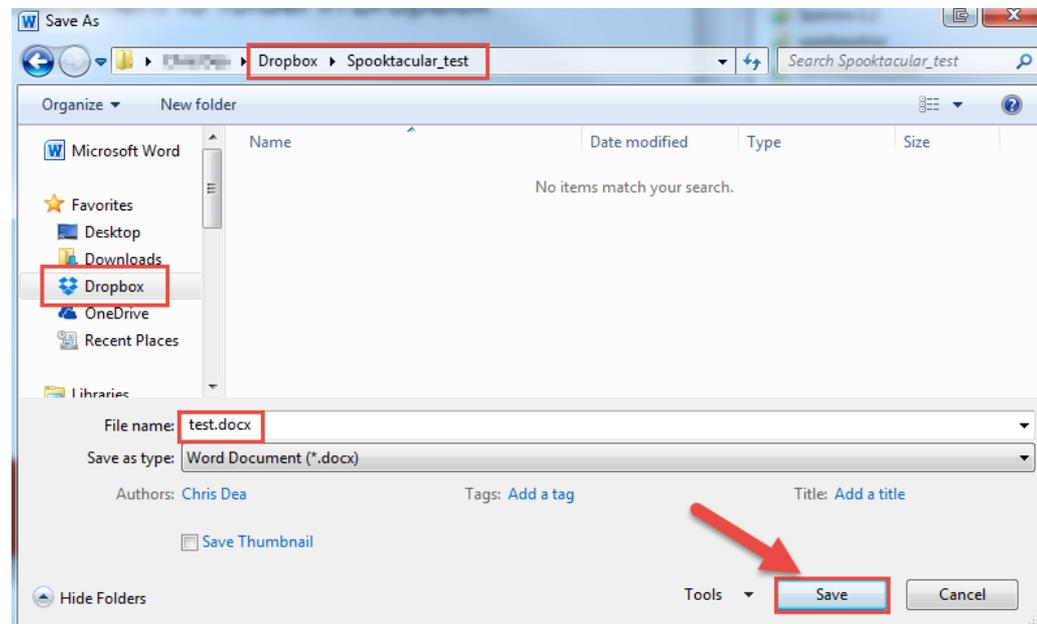
Using Dropbox

- To sync files to your Dropbox
 - Save files to the Dropbox folder on your computer
 - Copy existing files or folders to Dropbox folder
 - Be careful about putting sensitive files in your Dropbox
- Local Dropbox folder:
 - Default folder is C:\Users\Username\Dropbox
 - Double-click Dropbox icon on computer's system tray to go directly to the folder



Using Dropbox (cont.)

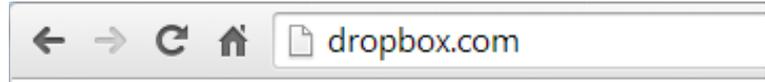
- Use **Save As** in Microsoft Word to save copy of existing document to Dropbox folder
- **Pro Tip:** Save one copy to your network shared folder (if available), then use **Save As** to save copy to Dropbox



Using Dropbox via Web

Login to Dropbox to download file

- Use your browser and go to:
- Sign in to Dropbox with your registered email and password



Sign in

or [create an account](#)

Remember me

Sign in

[Forgot your password?](#)

Using Dropbox via Web (cont.)

- Navigate to folder in Dropbox account

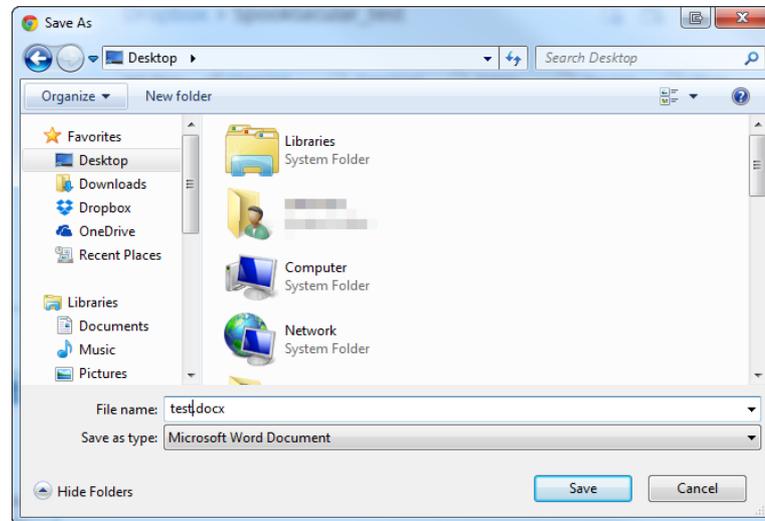
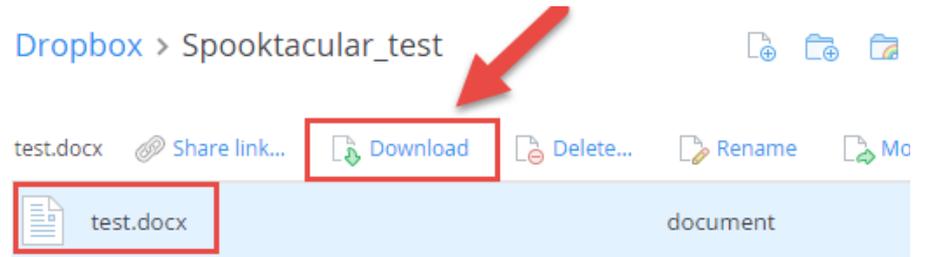
The image shows two screenshots of the Dropbox web interface. The left screenshot displays a list of folders in a Dropbox account. The folder 'Spooktacular_test' is highlighted with a red box, and a red arrow points from it to the right screenshot. The right screenshot shows the contents of the 'Spooktacular_test' folder, with the file 'test.docx' highlighted by a red box. The breadcrumb path 'Dropbox > Spooktacular_test' is also visible in the right screenshot.

Name	Kind	Modified
sound_effects	folder	--
spooky_1_2	folder	--
spooky_voice	folder	--
Spooktacular_test	folder	--
Mr_Own_Pictures	folder	--
Opensoft_animals	folder	--

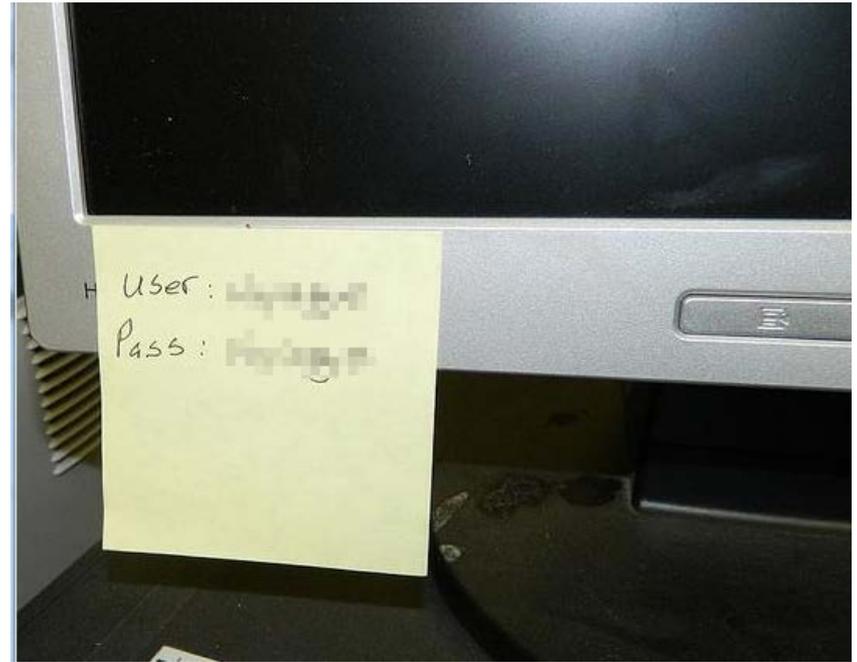
Name	Kind	Modified
test.docx	document	7 mins ago

Using Dropbox via Web (cont.)

- Click on file to select
- Click Download button from toolbar
- Save file to your computer



How do you currently store passwords?

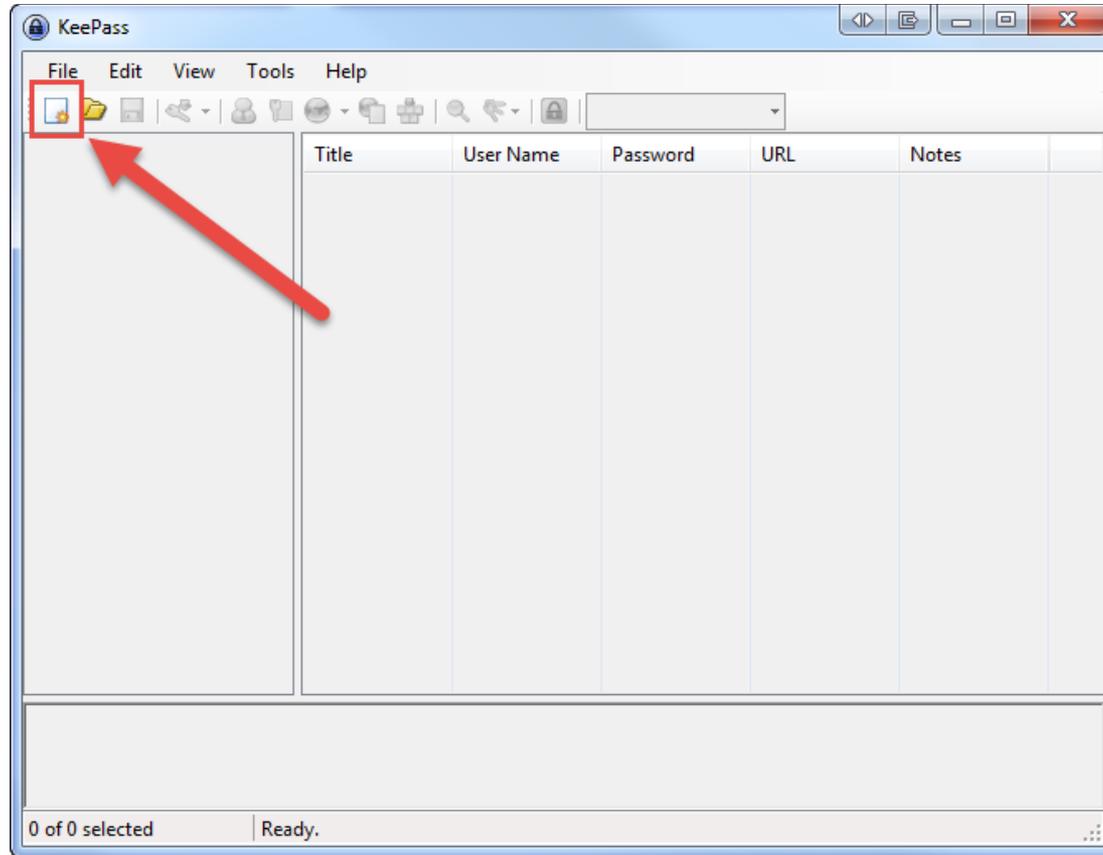


KeepPass

- Store passwords in on encrypted "database" file, keep locally on computer hard drive, OR store on USB drive
- Just remember one master password to access all passwords
- Optionally, create keyfile for extra security

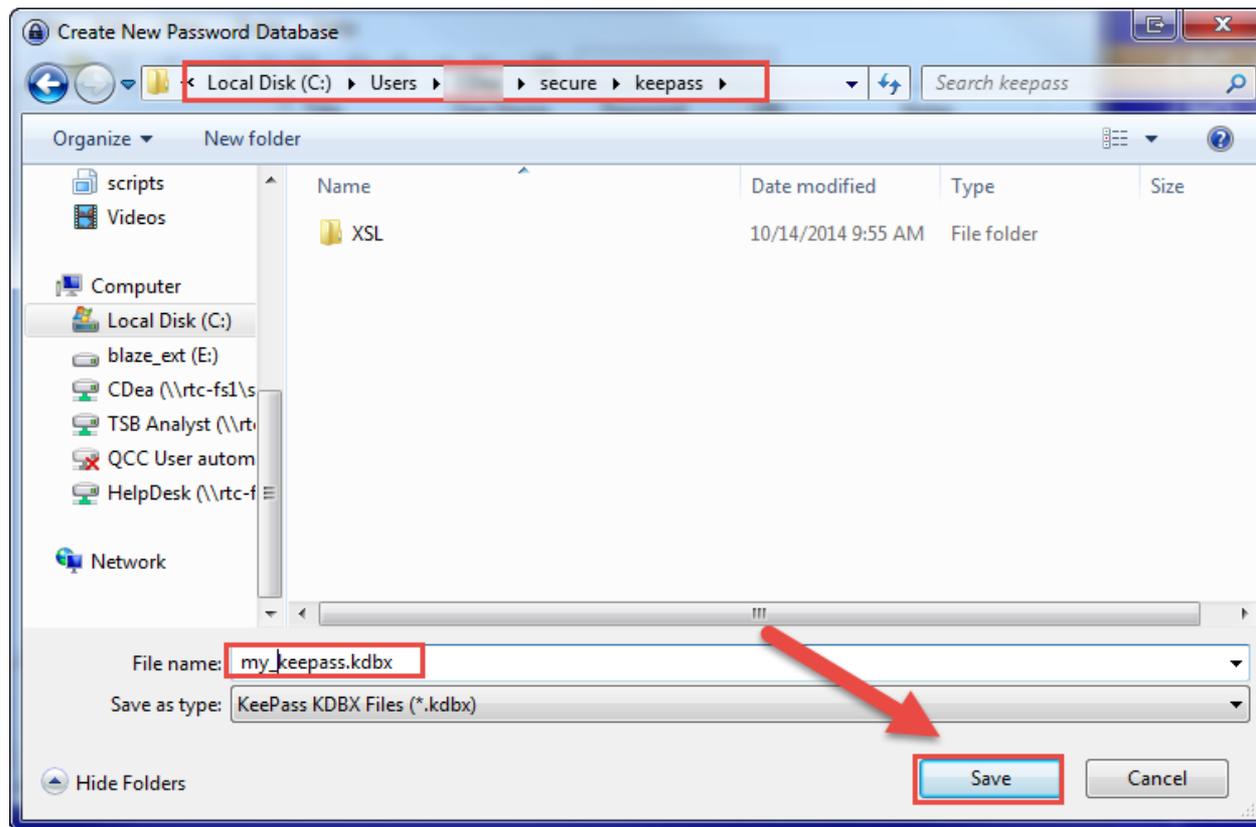
KeepPass Set Up

- Click **New** button (to create new keypass db)



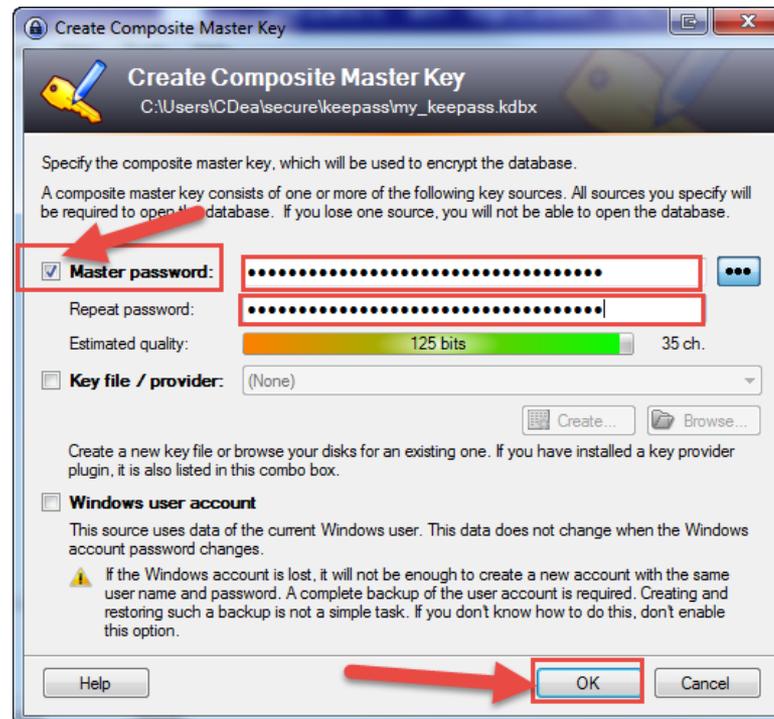
KeyPass setup (cont.)

- Choose **location** to save KeyPass db
- Choose **file name** for db file



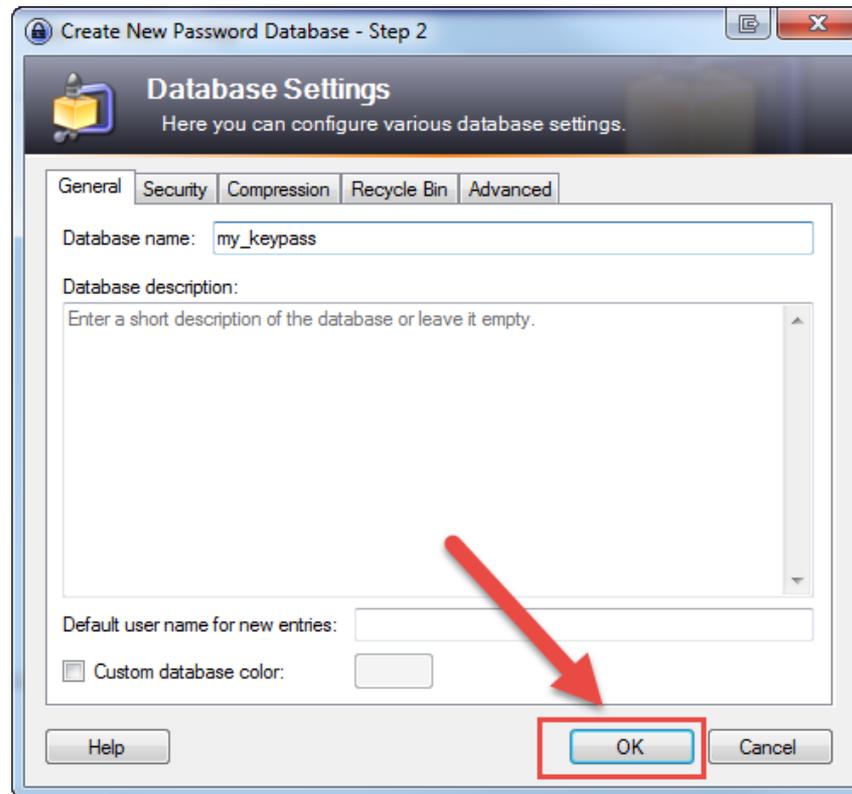
KeyPass setup (cont.)

- Enter your **Master Password** (twice)
- **Pro Tip:** instead of a word, use a **phrase**
- Use a **phrase** that has meaning to you, and you can remember it **exactly**
- Click **OK**



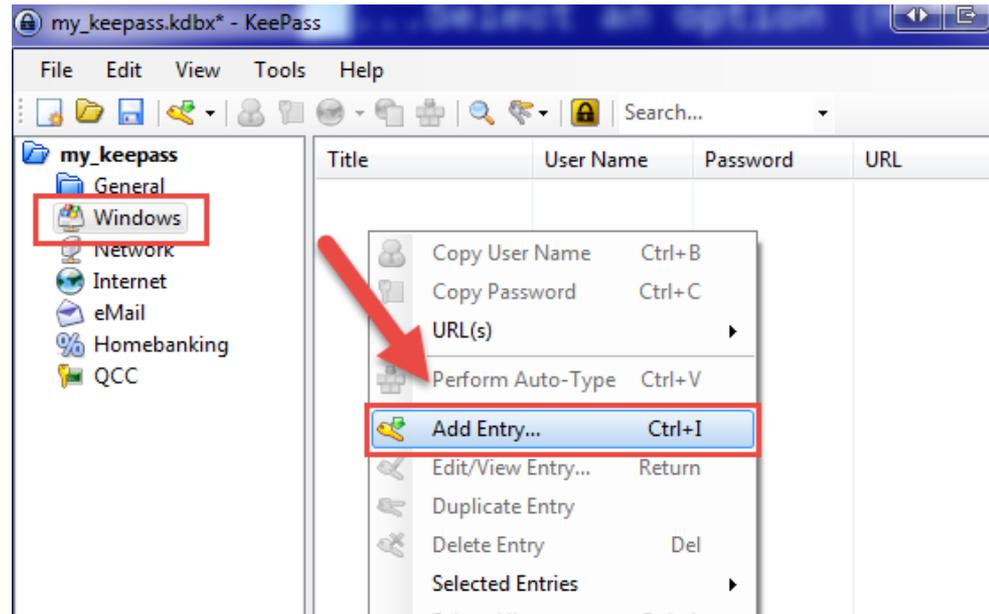
KeyPass setup (cont.)

- On Step 2, click **OK**
 - Use default options



Setting Up a New Password

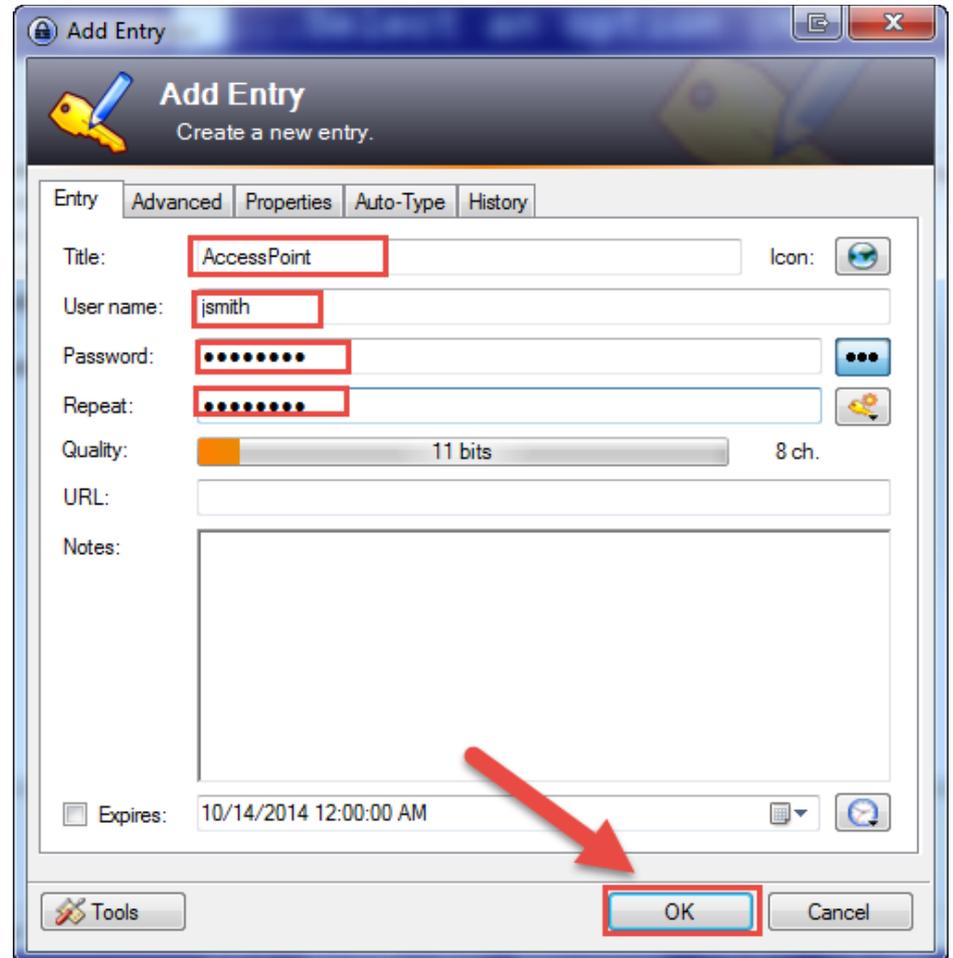
- Select a password **category/folder** from the **left side**
- **Right-click** on the password pane on the **right side**
- Select **Add Entry**



Setting Up a New Password (cont.)

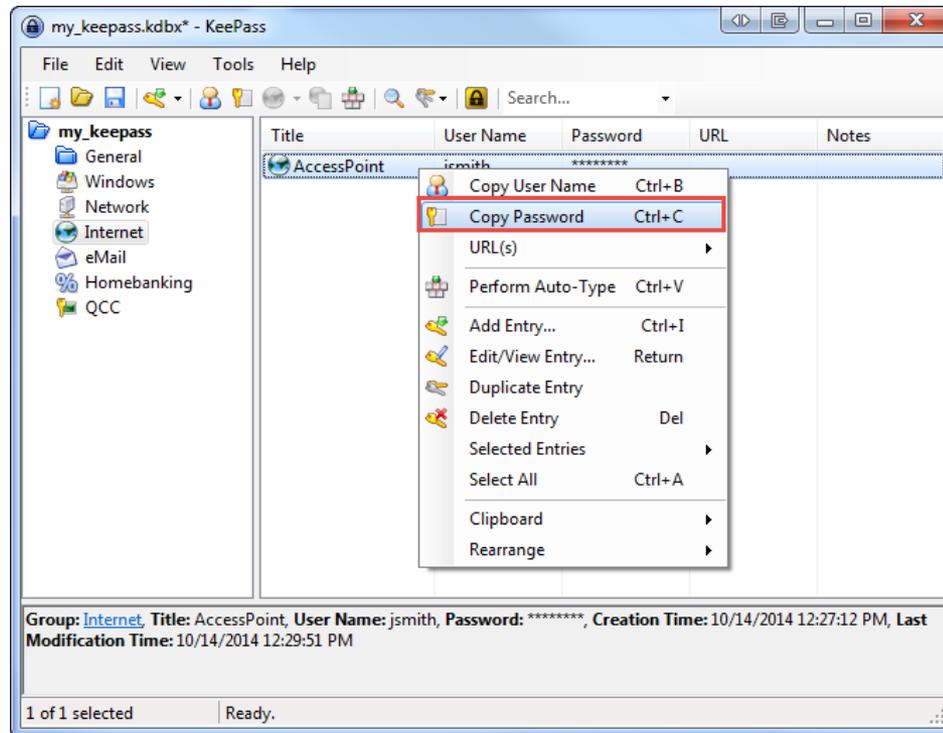
Enter the following:

- Title (Name of Program or Website)
- User name
- Password
 - Repeat Password
- Click **OK**



KeyPass- Using a Password Entry

- **Right-click** on the password entry (from the pane on the right side)
- Select **Copy Password**



KeyPass – Using a Password Entry (cont.)

- Open the website (or program) you are logging into
- Enter your user name
- **Right-click** in the Password field
- Select **Paste**
 - The password from KeePass will be inserted

