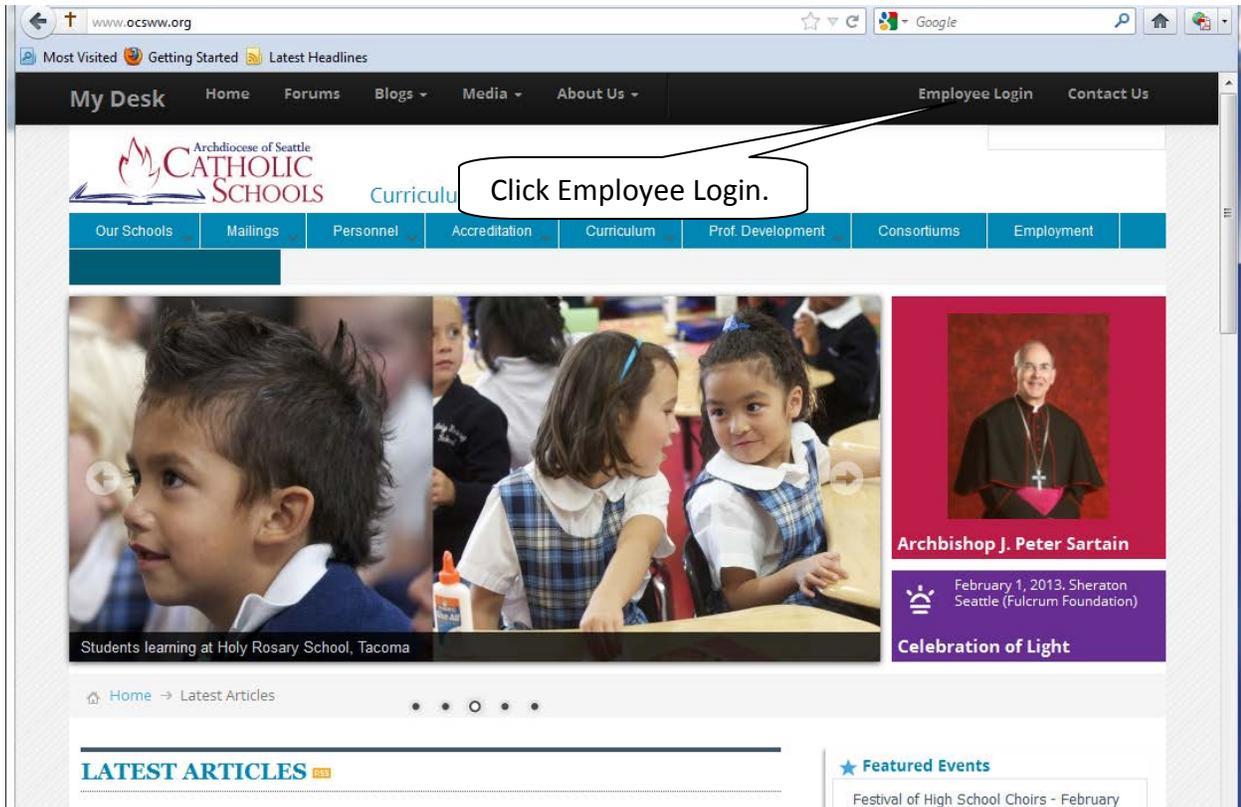


CSED Editing Tutorial

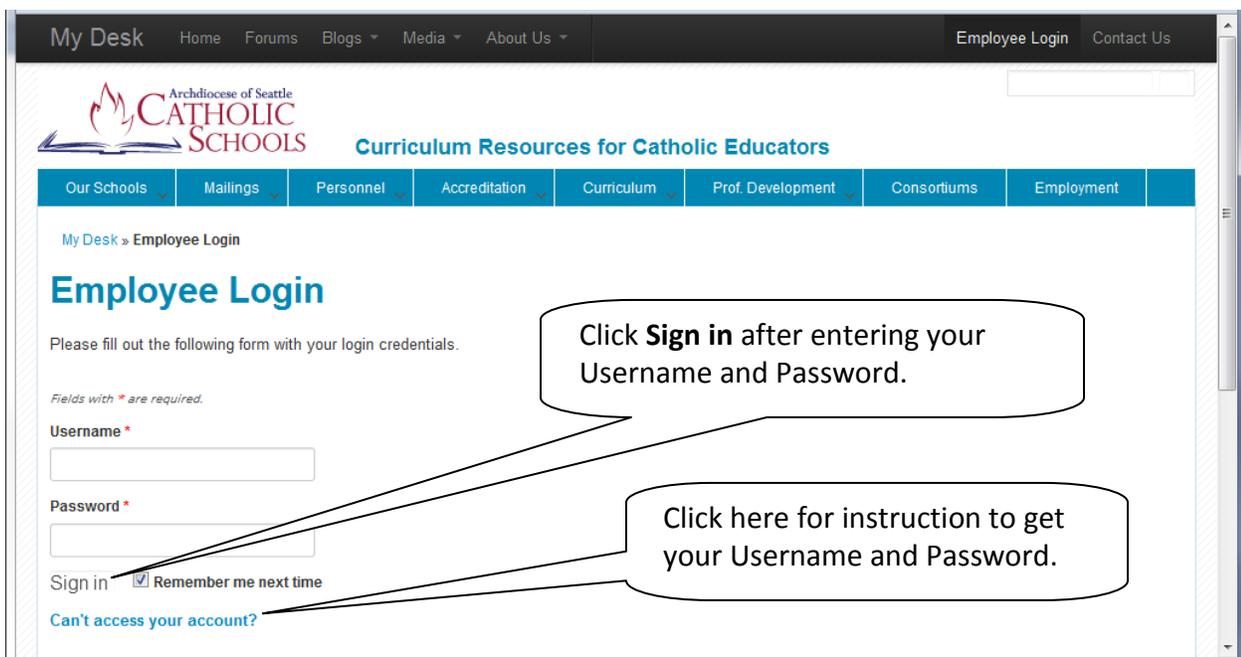
Login as an Employee

Direct your browser to: ocsww.org (Office for Catholic Schools of Western Washington)



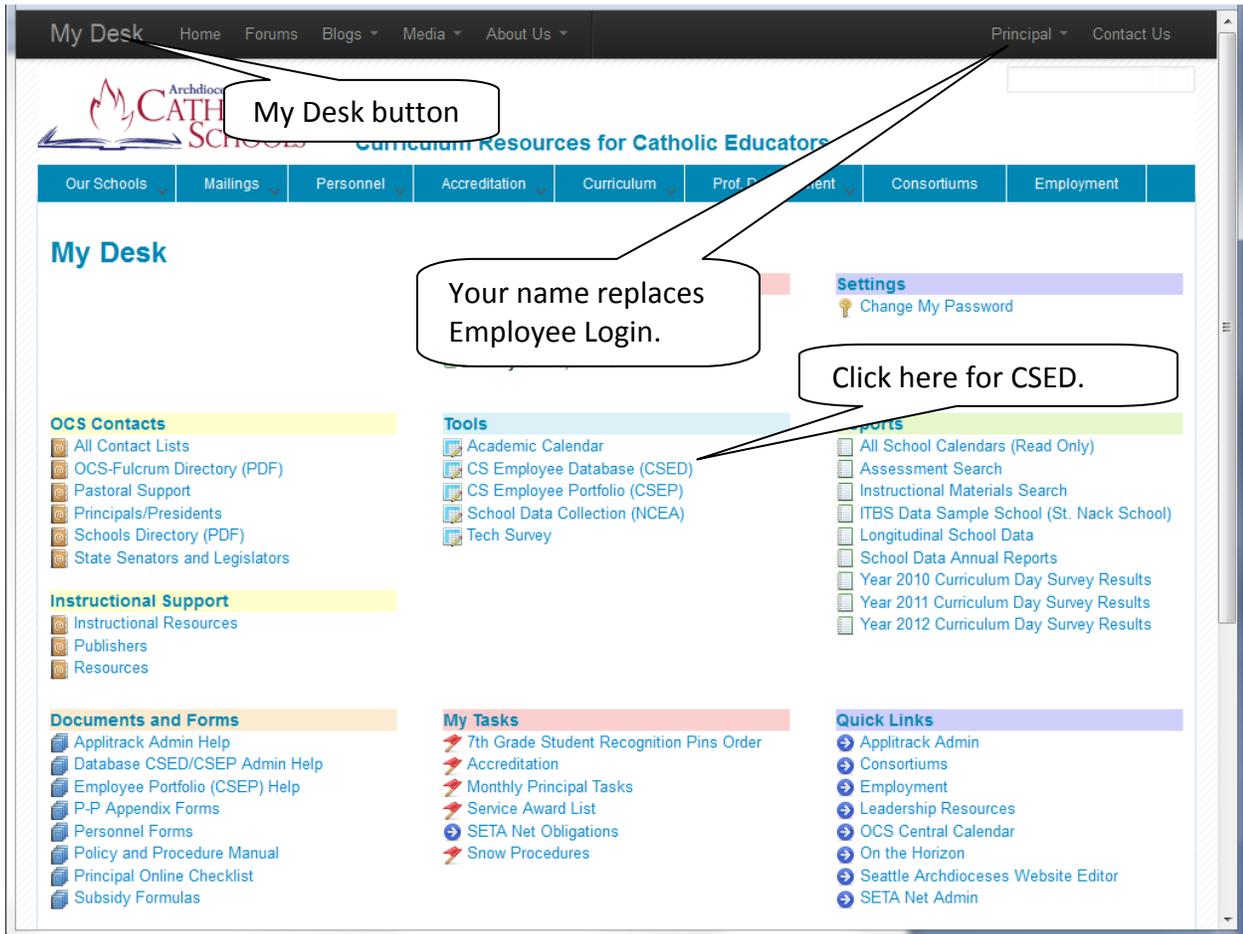
Enter your Username and Password and click **Sign in**.

If you have forgotten your user name or password, click on **Can't access your account?**

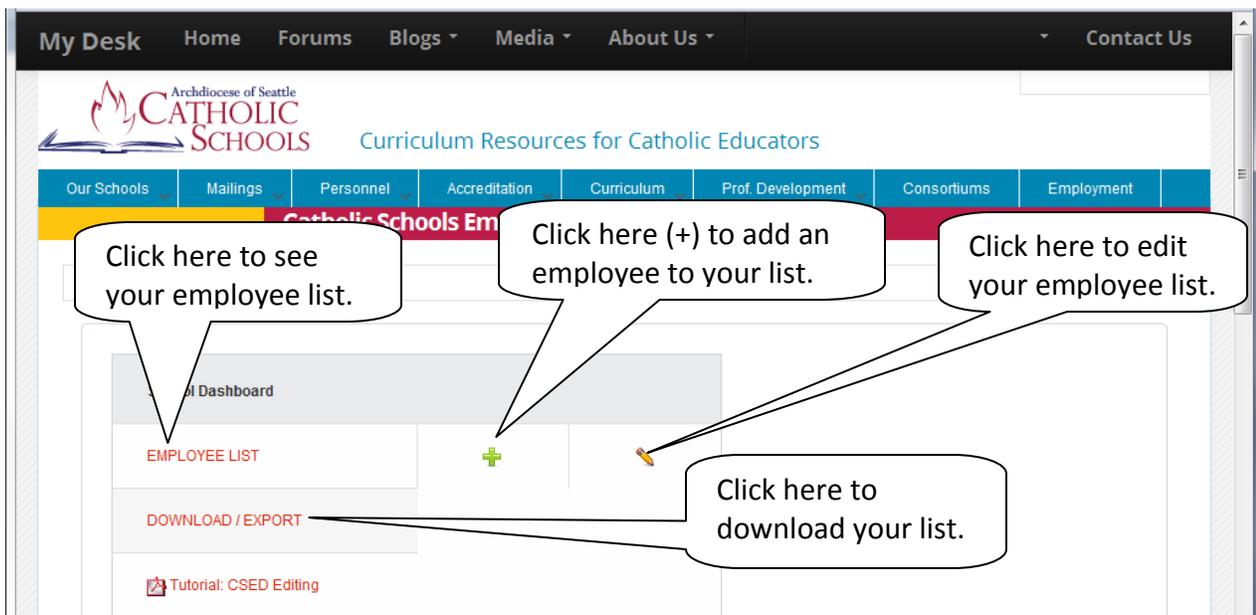


My Desk - your main work screen

Click on the **My Desk** button and on **CS Employee Database** under the Tools heading. (This screen is often updated and may not be identical to the one you are now viewing.)



You will see your School Dashboard where you can add, edit, and download employee data. In general you will want to go straight to your Employee List.



Looking at your Employee List

The screenshot shows the 'Catholic Schools Employee Database' interface. At the top, there is a navigation bar with links: My Desk, Home, Forums, Blogs, Media, About Us, and Contact Us. Below this is the Archdiocese of Seattle Catholic Schools logo and the text 'Curriculum Resources for Catholic Educators'. A secondary navigation bar includes: Our Schools, Mailings, Personnel, Accreditation, Curriculum, Prof. Development, Consortiums, and Employment. The main heading is 'Catholic Schools Employee Database'. Below the heading, there is a search bar and a '+ Employee List' link. A table displays employee records with columns: Username, Email, Position, Roles, and Terminate. Callouts point to specific elements: 'Click here to add a new employee.' points to the red '+' icon; 'Click pencil to edit this employee's data.' points to a pencil icon in the Position column; 'Click here to terminate this employee from your list.' points to a red trash icon in the Terminate column; and 'Click pencil to edit this employee's Position(s).' points to a pencil icon in the Position column.

| Username | Email | Position | Roles | Terminate |
|----------------|--------------------------------|----------------|-----------------|-----------|
| Teacher A | fvcondo305@gmail.com | Teacher | School Employee | |
| Principal | carls@seattlearch.org | Principal | School Employee | |
| Don Altenhofer | don.altenhofer@seattlearch.org | Administration | | |

Adding a new employee. Click [+].

We first show how to add a new employee. Click on the red [+] icon after the words Employee List. (See above.) The screen on the next page shows the minimum information that you need to enter to create an employee record. Remember, the employee will be able to log in and enter more complete information at a later date.

1. Enter first and last name. Middle name or initial is optional.
2. Whenever possible, use the school's email address, (staffname@myschool.org)
3. We suggest you have a standard password for new users (like changeme)
4. Choose a Position from the drop-down menu. Hint: if you type T, it will automatically scroll to Teacher in the list. Choose the best fit from the given list.
5. Fill in FTE as a number between 0 and 1.0.
6. You may not have the Hire Date handy, so you might want to just click in the field and enter today's date.
7. Finally, the Role is preset to School Employee, so you do not need to enter a new role. If this employee has special roles assign as many additional roles as you see fit.

As the school administrator of CSED, you can reset (but not see) any employee password. By checking the box under Roles, the login name and password are sent to the user. This alerts the employee they can now log on and complete their personal profile information.

When done, click Save

Create User screen

My Desk Home Forums Blogs Media About Us Contact Us

Archdiocese of Seattle
CATHOLIC SCHOOLS
Curriculum Resources for Catholic Educators

Our Schools Mailings Personnel Accreditation Curriculum Prof. Development Consortiums Employment

Catholic Schools Employee Database

CSED Home Authentication Employee List Create User

Create User

First Name*:

Last Name*:

Middle Name:

Email*:

Password*:

Position*:

FTE*:

Hire Date*:

Roles*: Role Definitions and Permissions

- Academic Calendar Editor
- AppiTrack Administration
- Archdiocesan School Board
- Arch...
- Curri...
- Destiny Consortium Team
- Family Life Con...
- Fulcrum...

Check here to email login information (Username/Password) to this user.

An empty Create User screen ready to populate.

Sends email with Username and Password if checked.

Save your work!

After saving, you will be shown a more extensive screen of employee data (see below) that is intended to be completed during the school year. However, you can at this point complete any or all of it. For example, if you are tracking Safe Environment compliance, you will want 100% participation on that field. Note that an employee will access their specific personal data (but not Roles and Positions) through the employee database called Catholic Schools Employee Portfolio (CSEP), not through CSED as you do. The two databases are synchronized.

A view of full employee data file contents that can be edited in CSED

The screenshot shows the 'Edit User' form in CSED. The form is divided into several sections: Personal Information (Title, First Name, Last Name, Middle Name, Last 4 SSN, Username, Email, Secondary Email, Password), Roles (a list of roles including Academic Calendar Editor, ApplTrack Administration, Archdiocese Web Directory Editor, CSD Guest, CSD Staff, CSD Staff - Sup, Curriculum Coordinator, and Destiny Consortium Team), Demographics (Birth Date, Gender, Ethnicity, Race, Religion, Home Parish), and Safety (Safe Environment ID, Safe Environment Date, CICS Date). On the right side, there are sections for Service Awards (Previous and Next), Certification (Catechist Certified, Certified, National Board Certified), and Contact Information (Mailing Address, City, State, Zip, Work Phone, Home Phone, Cell Phone, Skype, Notes). At the bottom right, there is a checkbox labeled 'Check here to email login information (Use email...)' and 'Save' and 'Cancel' buttons. Three callouts provide instructions: 'Erase the old password and enter a new one for forgetful employees.' points to the Password field; 'Roles are separate from Positions.' points to the Roles list; and 'If checked, login info is sent by email.' points to the checkbox. A fourth callout 'Save to make changes.' points to the Save button.

If you need to add another employee name, click the CSED Home or Employee List button above the large blue Create User heading, and either screen displays [+] button. At any time you can exit CSED editing by clicking the My Desk or Home on the black banner at the very top of the page.

Editing a current employee and changing their password

You can edit the information above by clicking the pencil next to the employee's Username in the Employee List screen. Don't forget to click Save at the bottom of the screen. (It is a long screen and you may need to scroll to see Save.) In particular, if an employee forgets their password, you can erase their old one and replace it with a new one we suggest something simple like "changeme". If the box above Save is checked, an email with Username and Password is sent by email to the employee. You should annually review the Roles assigned to employees. For example, your Liturgical Coordinator, may change from year to year. Roles are like duties and should not be confused with Positions. Positions are job descriptions like, Teacher, Principal, or Librarian. The next section discusses how to edit Positions.

Selecting and editing Positions

An employee may have multiple positions. It is easiest to edit a position by clicking on the pencil next to the position name listed in the position column. (See page 3 screen.) If the Position is Teacher, you will be requested to complete Grades and Subjects. Remember FTE stands for Full Time Equivalent and is a number between 0 and 1.0. If an employee holds multiple part-time positions, the total of FTEs should not exceed 1.0. Dates can be entered in many formats (such as April 20, 2001, or 4/20/01), but will be displayed in the format: yyyy-mm-dd.

My Desk Home Forums Blogs Media About Us Contact Us

CSED Home Employee List Edit Position

Edit Position

Please fill out the form below for EACH position.

First Name*: Teacher

Last Name*: AA

School: Office for Catholic Schools, Seattle

Position*: Teacher

Grades Taught:

- Pre-K
- K
- grade 1
- grade 2
- grade 3
- grade 4
- grade 5
- grade 6

Subjects Taught:

- Arts
- ASL
- Business
- Computer/Technology
- Drama
- English
- ESL
- Gifted

FTE*: 1.00

Certified*: Non-Certified

Hire Date*: 2013-02-01

Terminated Date:

Save Cancel

Name shows, but cannot be edited.

These menus only show for the position of Teacher.

As usual, don't forget to Save!

Why is Position so important? The Position entry should closely follow the employee's Covenant by identifying the job title and the FTE (Full Time Equivalent). The more specifically you identify an employee's position, the more complete the Archdiocesan wide contact lists will be. The All Contacts (My Desk screen on our website) allows all employees to access colleagues by Position.

Terminating an Employee

By click the red shield on the right side of your Employee list, you can delete an entry. (See page 2 screen.) The screen below shows that an employee can be Terminated or Removed. The Terminate option removes the employee from your CSED list, but keeps a record in an archive. If an employee retires, resigns, or is not returning, use this option. The Remove option is used in cases where someone has accidentally been entered twice and you want to remove the duplicate. When removed, this record will not be archived. You can use the Remove option if you created a test employee to practice or show in a presentation and you want to erase it completely. Please review your CSED Employee list regularly and Terminate or Remove employee names that are no longer employed at your school. We suggest a review in June and September, minimally.

The screenshot shows the 'Catholic Schools Employee Database' interface. At the top, there is a navigation bar with 'My Desk', 'Home', 'Forums', 'Blogs', 'Media', 'About Us', and 'Contact Us'. Below this is the 'Archdiocese of Seattle CATHOLIC SCHOOLS' logo and the text 'Curriculum Resources for Catholic Educators'. A secondary navigation bar includes 'Our Schools', 'Mailings', 'Personnel', 'Accreditation', 'Curriculum', 'Prof. Development', 'Consortiums', and 'Employment'. The main heading is 'Catholic Schools Employee Database' with a search bar and 'Import Users | School:'.

The 'Terminate Employment' form is displayed. It includes a breadcrumb trail: 'CSED Home > Employee List > Terminate Employment'. A blue information box states: 'Please fill out termination date below. Please note that all current positions for this user will be removed as well.' The form fields are: 'First Name: Teacher' and 'Last Name: AA'. A callout bubble points to the 'Last Name' field with the text 'Name shows but cannot be edited.' Below this is a section titled 'Current Positions' with a table:

| School | Position | Grades | FTE | Certified | Hire Date |
|--------------------------------------|----------|--------|------|-----------|------------|
| Office for Catholic Schools, Seattle | Teacher | | 1.00 | nc | 2013-02-01 |

Below the table is the 'Terminated Date:' field, which is empty. A callout bubble points to this field with the text 'Enter the date before pressing Terminate.' At the bottom of the form are three buttons: 'Terminate' (red), 'Remove' (dark red), and 'Cancel' (blue).

Summary of options:

Terminate – employee is leaving your school and employee data will be archived.

Remove – duplicate or fictitious employee data will be erased.

Cancel – exit without action.

Note: There is no Save or Confirm. The selected option is completed and confirmed as soon as you click one of these buttons.