



York Catholic District School Board



User Guide

November 2017

How to Use this Guide

This guide has been broken down into meaningful sections, ideal for quick reference.

ICONS TO LOOK FOR



Time-saving Tip



Warning!

Note



Important

Support

Should you require support for any of the instructions provided in this document, use one of the following options below.

CALL CENTRE


Telephone	Help Site	My Portal
1-888-767-4778	Accessible through → Call Centre web site help.ycdsb.ca → 	Click on the Help menu in My Portal and choose Open Online help.

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- Appendix A Security Questions First Time Logging Onto My Portal**
(from “First Time Logging Onto My Portal”, Page 4)

 - Appendix B How to reset your Computer Logon Password**
(from Forgot Your Password, Page 4)

 - Appendix C My Portal Login Error Correction**
(from ESS Overview, Page 9)

 - Appendix D How to print your Salary Statement and Tax Forms**
(from “Procedure to display your payment information:”, Page 15)

 - APPENDIX E How to view past Salary Statements**
(from “Procedure to display your payment information:”, Page 15)
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Overview

Introduction

ESS (Employee Self Service) is a module which is part of the SAP My Portal. This is a web based program which allows users to perform the following activities relating to their personal information with the York Catholic District School Board:

- Display the Benefit Plans you are enrolled in.
- Manage your personal information.
- View your salary statement.
- View your Available Personal Balances (TSSI absences).

The purpose of this document is to describe how to:

- login and out of My Portal,
- use the My Portal home page,
- view and manage your compensation using the Employee Self-Service functions, and
- view your “Available Personal Balances”.

Contents

This document contains the following topics:

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How to Access the My Portal Website

Introduction

The My Portal program is a web based application which can be accessed from any computer that has internet access.

Website Address

The My Portal website address is: <https://myportal.ycdsb.ca/>



Important:

- The My Portal website runs best on Internet Explorer version 6 or higher. If you experience unexpected results in other browsers, please log out of My Portal and log in using Internet Explorer.
-

Favourites

Upon accessing the My Portal website, you may add this site to your list of favourites:

- by choosing Favourites, and
- add to Favourites, or
- add the Explorer icon to your desktop.



Note: Add the favourite before you logon to ESS, i.e.; at the logon screen.

Staff Tab

My Portal may also be access from the YCDSB website as follows:

- Go to the Board website at www.ycdsb.ca
 - Click the "Staff" tab at the far right side of the YCDSB web page.
 - The My Portal login is located at the right side of the staff web page.
-

Logon to My Portal

Introduction

To logon to My Portal, users will:



- access the My Portal website, and
- type their computer User ID and password that is used to access any Board computer.



Note: The password will always be up to date, i.e.; it will reflect your current Board logon password.

Procedure to Logon to My Portal

Follow the steps below to logon to My Portal.

Step	Action
1.	<p>Display the My Portal Logon page by:</p> <ul style="list-style-type: none">• opening the Internet Explorer icon  from your computer's desktop and typing the My Portal address in the address bar (https://myportal.ycdsb.ca), or select the My Portal Logon page from your Favourites, or• selecting the Staff tab from the Board website (www.ycdsb.ca), or• selecting the FirstClass Employee Area conference, then the My Portal conference and the My Portal weblink. <p>Result: The My Portal Logon page will be displayed.</p> 


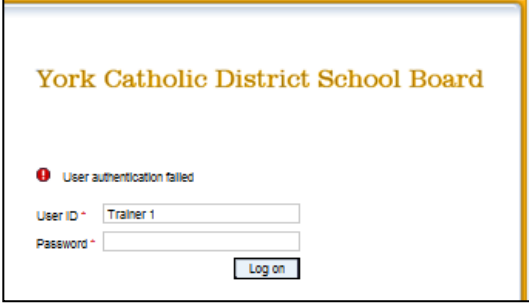
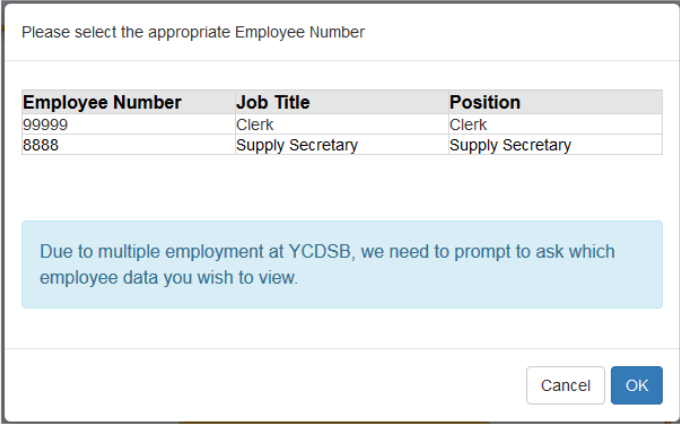
Step	Action										
2.	<ul style="list-style-type: none"> Type your computer User ID in the “User ID:” text box. Type your computer password in the “Password:” text box. Press Enter on your keyboard or Click the Log on button. <p> Warning: The first time you logon to the internet using a different computer, you may be asked if you wish to save your password. For security reasons you are required to choose NO.</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>this is the first time you are logging onto My Portal</td> <td> <ul style="list-style-type: none"> the Security Questions window will be displayed. You will be required to answer two questions (the last three digits of your Social Insurance Number, and your Birth Date). You are only required to answer these questions once. Detailed instructions are provided in Appendix A at the end of this manual. </td> </tr> <tr> <td>you logged on successfully</td> <td> <ul style="list-style-type: none"> the My Portal Home Page will be displayed (Figure 1 below). </td> </tr> <tr> <td>you receive the message “User Authentication failed” (Figure 2 below)</td> <td> <ul style="list-style-type: none"> attempt to enter your computer User ID and Password again, and if you are not successful, please follow the instructions in Appendix B at the end of this manual to reset your computer logon password. </td> </tr> <tr> <td>you are an employee with multiple Employee ID's</td> <td> <ul style="list-style-type: none"> a window will be displayed containing a list of employee ID's associated with your login (Figure 3 below) the information displayed upon logging in will contain the details associated with the chosen employee ID, i.e.; benefits, salary statement, etc. to choose a different employee number, you must log out of My Portal and log back in to choose the required employee number. </td> </tr> </tbody> </table>	If...	Then...	this is the first time you are logging onto My Portal	<ul style="list-style-type: none"> the Security Questions window will be displayed. You will be required to answer two questions (the last three digits of your Social Insurance Number, and your Birth Date). You are only required to answer these questions once. Detailed instructions are provided in Appendix A at the end of this manual. 	you logged on successfully	<ul style="list-style-type: none"> the My Portal Home Page will be displayed (Figure 1 below). 	you receive the message “ User Authentication failed ” (Figure 2 below)	<ul style="list-style-type: none"> attempt to enter your computer User ID and Password again, and if you are not successful, please follow the instructions in Appendix B at the end of this manual to reset your computer logon password. 	you are an employee with multiple Employee ID's	<ul style="list-style-type: none"> a window will be displayed containing a list of employee ID's associated with your login (Figure 3 below) the information displayed upon logging in will contain the details associated with the chosen employee ID, i.e.; benefits, salary statement, etc. to choose a different employee number, you must log out of My Portal and log back in to choose the required employee number.
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Figure 1: My Portal Home Page



Step	Action
	<p>Figure 2: My Portal Authentication failed page</p> 
	<p>Figure 3: Multiple employee number window</p> 

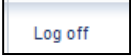

Logout of My Portal

Introduction

There are different methods or Logging out of My Portal as it is a web based application.

Procedure to Logout of My Portal

Follow the steps below to logout of My Portal:

If...	Then...
you wish to logout of My Portal and remain in the Internet	<p>click the Log off button which is located at the top of every My Portal page.</p> 
you wish to logout of My Portal and close the Internet	<p>click the ☒ (close button) in the upper right hand corner of the Internet Explorer page.</p> 

My Portal Main Page

Introduction

This section describes the basic functionality of the My Portal main page, including the:

- Internet, and
 - My Portal Home Page.
-



Internet Functionality

The following tips are for Internet Explorer 6 and up:

Back Icon

- DO NOT press the Back icon  from the Explorer toolbar.



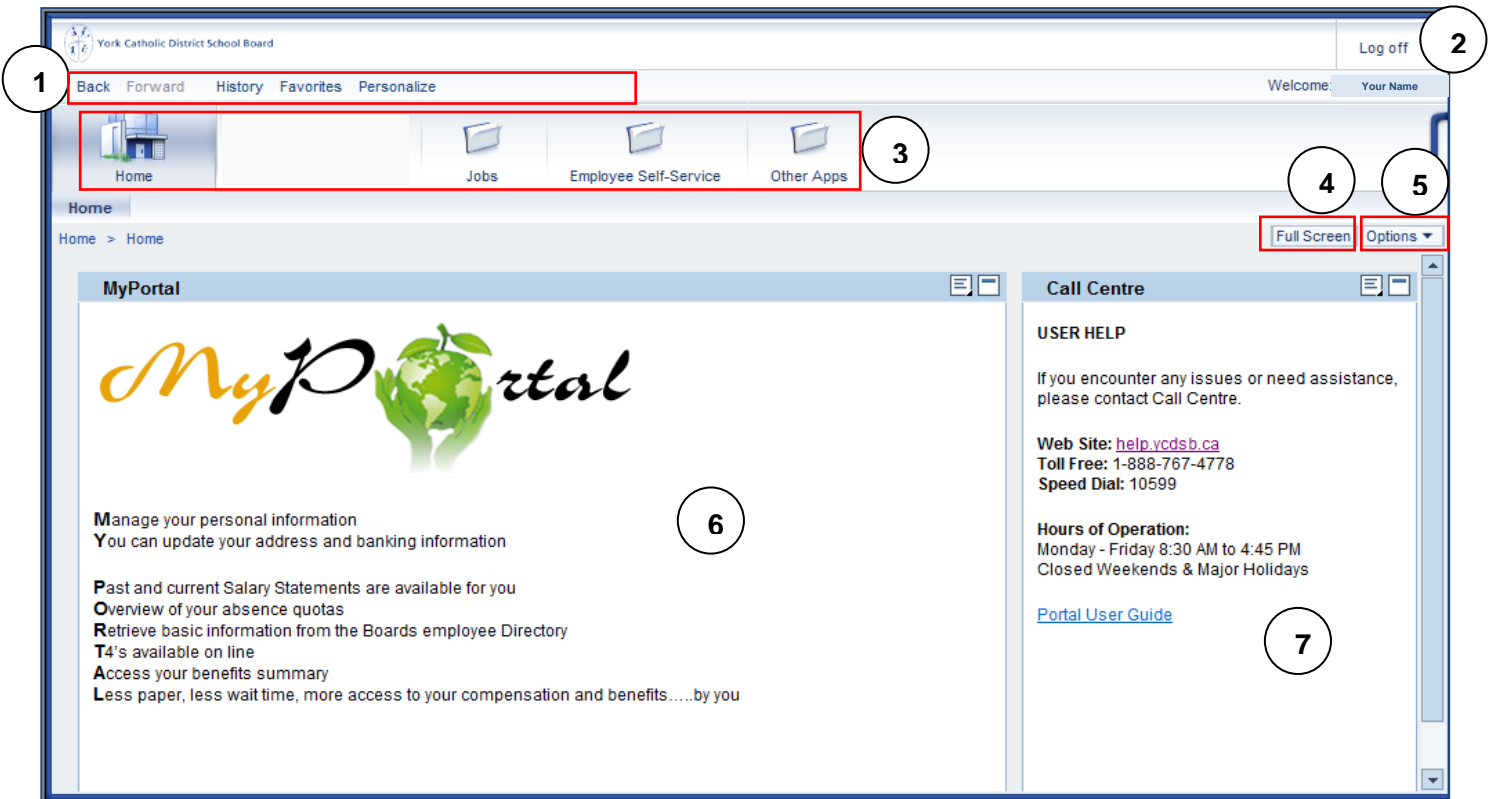
TIP: Within My Portal, you may use either the  or  buttons to return to the previous windows.

F11 Full Screen

- Press F11 on your keyboard when you are working in Internet Explorer and many other programs, and the window will open to full screen mode
- The Internet toolbars will disappear to display more information on the screen.
- Press F11 on your keyboard when you are in full screen mode will toggle you back to your normal view.

My Portal Home Page

Following is a description of the My Portal home page.



The following table describes each part of the My Portal home page:

#	Part	Function
1	Menu	Allows users to select My Portal specific commands.
2	Log off Button	Allows users to logout of My Portal and remain in the web browser.
3	Tabs	Allows users to select the required My Portal function.
4	Full Screen Button	Expands the tab contents to maximize the contents window. This button is visible in every MyPortal tab.
5	Options Icon	Displays the following window menu which is visible in every MyPortal tab: <div data-bbox="976 1577 1281 1759" style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <ul style="list-style-type: none"> Open in New Window Refresh Personalize Details Add to Browser Favorites </div>
6	Tab Contents	Displays the contents of the current tab. Current tab is the Home tab contents.
7	Call Centre Contents	Describes how to obtain help.

ESS Functions

Introduction

The purpose of this section is to:

- search for the employee directly by name and position within the Board,
- view and manage your personal information using the ESS functions.

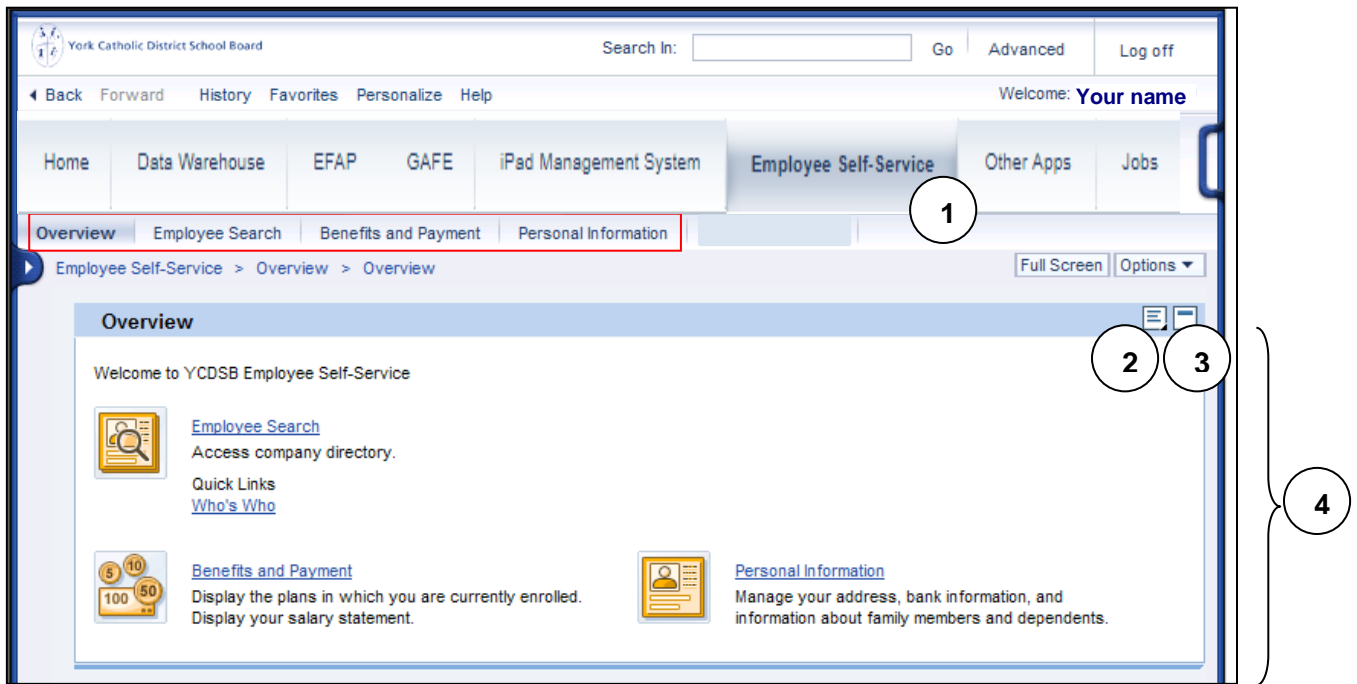
Contents

This section describes how to use the following ESS functions which are available in the Employee Self-Service (ESS) tab:

Topic	The purpose of this topic is to...	See Page
ESS Overview	access any of the ESS functions from the ESS Overview tab contents.	9
Employee Search	search for employees by name and find basic information about colleagues and their position in the company, and to maintain personal information and make it available companywide.	10
Benefits and Payment	display the plans in which you are currently enrolled, and to display your salary information.	13
Personal Information	manage your address, bank information, and display information about family members and dependents.	16
Work Environment	display any equipment which is assigned to you, i.e.; laptop.	18

ESS Overview

Following is a description of the ESS Overview contents:



Warning: If you receive the following error upon selecting the Employee Self-Service tab “Sorry, your browser/program is not supported by Web Dynpro!”, follow the instructions in **Appendix C** at the end of this manual to correct this issue.

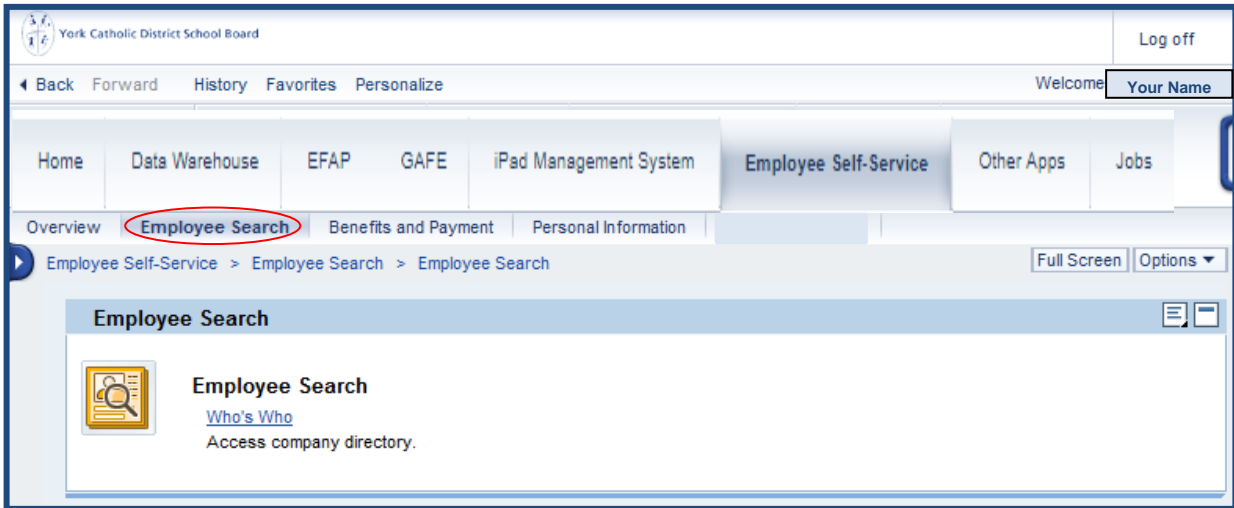
The following table describes each part of the ESS Overview tab:

#	Part	Function
1	Employee Self-Service Tab	Allows users to access any of the required ESS function.
2	Options Icon	Displays the following menu: <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"> Open in New Window Refresh Personalize Remove from Page Details Print </div>
3	Collapse Tray Icon	Collapses the contents of the current tab.
4	Overview Tab Contents	Displays the following contents of the Employee Self-Service Overview tab: <ul style="list-style-type: none"> • Employee Search • Benefits and Payment • Personal Information

Employee Search

The ESS Employee Search tab allows employees to:

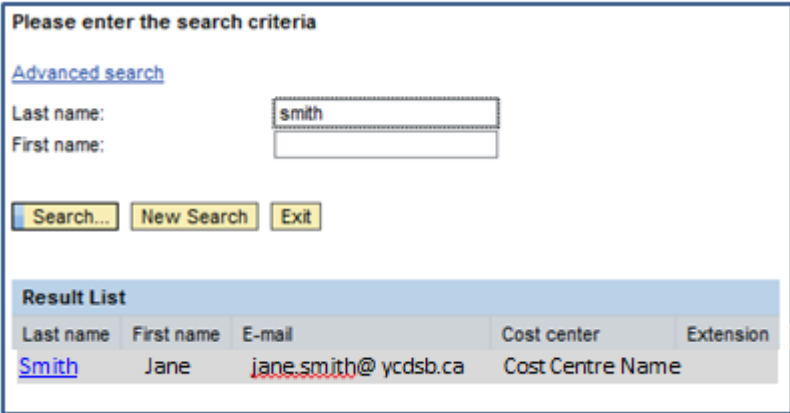
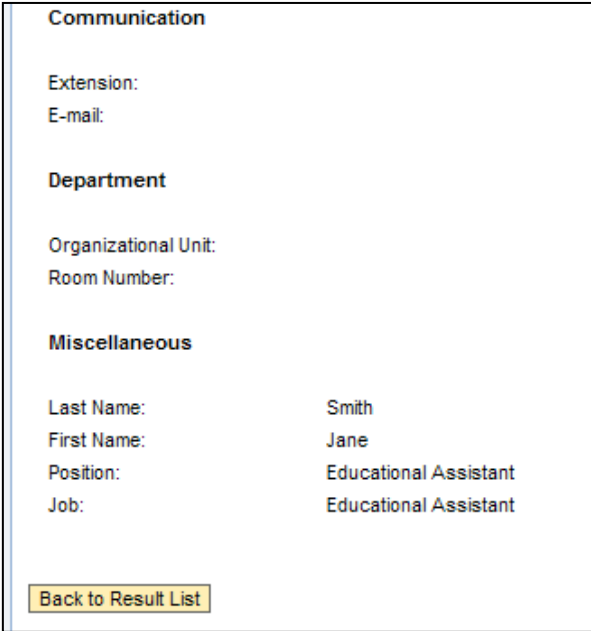
- search for employees by name and find basic information about colleagues and their position in the company, as well as
- maintain personal information and make it available company wide.



Procedure to Search for Employees

Follow the steps below search for employees by name and find basic information about colleagues.

Step	Action
1.	<p>Upon logging onto My Portal:</p> <ul style="list-style-type: none"> • Click the Employee Self-Service tab, and • Click the Employee Search sub tab. <p>Result: The Employee Search functions will be displayed in the tab contents.</p>
2.	<p>Click on the Who`s Who link.</p> <p>Result: The Who`s Who search window will be displayed:</p> <div data-bbox="592 1503 1166 1839" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Who's Who</p> <p style="text-align: center;">Please enter the search criteria</p> <p style="text-align: center;">Advanced search</p> <p>Last Name: <input type="text"/></p> <p>First Name: <input type="text"/></p> <p style="text-align: center;"> <input type="button" value="Search..."/> <input type="button" value="Exit"/> </p> </div>

Step	Action										
3.	<ul style="list-style-type: none"> • Type the last name in the “Last Name” text box, and/or • Type the first name in the “First Name” text box, and • Press Enter on your keyboard or click the Search button. <p>TIP: You may type the asterisk “*” before and/or after your text to enter a pattern or part of the first and/or last name if you are not sure on the spelling. e.g. Paul* = Paul, Paula, Paulette, etc. *am* = Tam, Tamad, etc.</p> <p>Result: The search results will be displayed:</p>  <p>The screenshot shows a search form with the following elements:</p> <ul style="list-style-type: none"> Title: Please enter the search criteria Link: Advanced search Last name: <input type="text" value="smith"/> First name: <input type="text"/> Buttons: Search..., New Search, Exit Section: Result List Table: <table border="1"> <thead> <tr> <th>Last name</th> <th>First name</th> <th>E-mail</th> <th>Cost center</th> <th>Extension</th> </tr> </thead> <tbody> <tr> <td>Smith</td> <td>Jane</td> <td>jane.smith@ycdsb.ca</td> <td>Cost Centre Name</td> <td></td> </tr> </tbody> </table> 	Last name	First name	E-mail	Cost center	Extension	Smith	Jane	jane.smith@ycdsb.ca	Cost Centre Name	
Last name	First name	E-mail	Cost center	Extension							
Smith	Jane	jane.smith@ycdsb.ca	Cost Centre Name								
4.	<p>Click the blue last name link upon locating the desired employee.</p> <p>Result: The employee profile will be displayed:</p>  <p>The screenshot shows the following employee profile information:</p> <ul style="list-style-type: none"> Communication <ul style="list-style-type: none"> Extension: E-mail: Department <ul style="list-style-type: none"> Organizational Unit: Room Number: Miscellaneous <ul style="list-style-type: none"> Last Name: Smith First Name: Jane Position: Educational Assistant Job: Educational Assistant Button: Back to Result List 										


Step	Action								
5.	Upon reviewing the employee profile click the “Back to Result List” button at the bottom of the screen.								
6.	<table border="1"> <thead> <tr> <th data-bbox="483 237 966 279">If you wish to...</th> <th data-bbox="966 237 1487 279">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="483 279 966 388">refine your existing search</td> <td data-bbox="966 279 1487 388">type the required text in the Last Name or First Name text box, and click the Search button.</td> </tr> <tr> <td data-bbox="483 388 966 464">clear your existing criteria to create a new search</td> <td data-bbox="966 388 1487 464">click the New Search button.</td> </tr> <tr> <td data-bbox="483 464 966 569">Exit the Who’s Who window and return to the Employee Search window</td> <td data-bbox="966 464 1487 569">Click the Exit button.</td> </tr> </tbody> </table>	If you wish to...	Then...	refine your existing search	type the required text in the Last Name or First Name text box, and click the Search button.	clear your existing criteria to create a new search	click the New Search button.	Exit the Who’s Who window and return to the Employee Search window	Click the Exit button.
If you wish to...	Then...								
refine your existing search	type the required text in the Last Name or First Name text box, and click the Search button.								
clear your existing criteria to create a new search	click the New Search button.								
Exit the Who’s Who window and return to the Employee Search window	Click the Exit button.								

Benefits and Payments

The ESS Benefits and Payments tab allows employees to:

- display the plans in which they are currently enrolled,
- and to display their payment information.

Benefits and Payment



Benefits

Benefits Participation

[Participation Overview](#)

To view plans you are enrolled in, click the radio button on each plan and show the participation details.

Please see definitions when viewing the details of an individual benefit plan:

- Participation period reflects last date the record was changed.
- Employee Cost (post-tax) means plan cost are based on employee post-tax salary.
- Rates shown excludes RST.

For any changes to your Plans please contact the Benefits Department.

Payment

[How to read my salary statement \(sample\)](#)

View recommendations on how to read your salary statement.

Note: please refresh page several times (hit F5 multiple times) to view PDF document. It is known issue with Internet Explorer. We are working on the fix at the moment.

[Salary Statement](#)

View your latest salary statement.

Please see the link below for Salary Statement Details (attendances and other info).

[Salary Statement Details](#)

View your attendances and other info if applicable.

[Total Compensation Statement](#)

View your latest total compensation statement.

[Personal Tax Credit](#)

Display or print the Personal Tax Credit Info.

[TD1 Personal Tax Credits Return](#)

Link to TD1 and TD10N personal tax credit forms.

Please forward completed forms to the Human Resources department.

[View T4 help document](#)

View T4 help document.

Note: please refresh page several times (hit F5 multiple times) to view PDF document. It is known issue with Internet Explorer. We are working on the fix at the moment.

[T4 Statement of remuneration paid](#)

Display or print the T4 Statement of remuneration paid.

Note:

The tax forms T4 and T4A for current year will be available at the end of February in the following year.

Employees with multiple employees numbers can display / print all T4s in one file (scroll it down to view).

[Gratuity Confirmation](#)

A copy of your retirement gratuity confirmation can be accessed here for eligible employees only.

Refer to your Collective agreement or terms of employment for details.

Donations

[Director's message](#)

The link to the Director's message.

[ShareLife donation](#)

The link to the ShareLife donation website.


[United Way donation](#)

The link to the United Way donation website.

Procedure to display the plans you are currently enrolled:


Follow the steps below search for employees by name and position

Step	Action
1.	<p>Upon logging onto My Portal:</p> <ul style="list-style-type: none"> • Click the Employee Self-Service tab, and • Click the Benefits and Payment sub tab. <p>Result: The Benefits and Payment functions will be displayed in the tab contents.</p>

Step	Action														
2.	<p>Click on the Participation Overview link to view a list of plans in which you are currently enrolled.</p> <p>Result: The Benefits Participation will be displayed, listing any plans you have.</p> <div data-bbox="657 277 1312 1031" data-label="Form"> </div> <p> Note: Click on the Show Benefits General Links to display links to sites and documents, also available beside some of the plans.</p>														
3.	<p>Click the radio button beside the benefits you wish to display and choose the Show Participation Details button.</p> <p>Result: The details for the benefit chosen will be displayed.</p> <div data-bbox="664 1272 1289 1730" data-label="Form"> <table border="1" data-bbox="683 1425 1224 1677"> <tbody> <tr> <td>Participation Period</td> <td>Starts on 02/21/2004</td> </tr> <tr> <td>Plan Option</td> <td>Dental -Std.Plan - Supp.Staff</td> </tr> <tr> <td>Dependent Coverage</td> <td>Family</td> </tr> <tr> <td>Employee Cost (Post-Tax)</td> <td>34,27 CAD Monthly</td> </tr> <tr> <td>Employer Credit</td> <td>137,08 CAD Monthly</td> </tr> <tr> <td>Deduction Model</td> <td>1st and 2nd Period - Monthly Value</td> </tr> <tr> <td>Dependents</td> <td>John Smith</td> </tr> </tbody> </table> </div>	Participation Period	Starts on 02/21/2004	Plan Option	Dental -Std.Plan - Supp.Staff	Dependent Coverage	Family	Employee Cost (Post-Tax)	34,27 CAD Monthly	Employer Credit	137,08 CAD Monthly	Deduction Model	1st and 2nd Period - Monthly Value	Dependents	John Smith
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Employee Cost (Post-Tax)	34,27 CAD Monthly														
Employer Credit	137,08 CAD Monthly														
Deduction Model	1st and 2nd Period - Monthly Value														
Dependents	John Smith														
4.	<p>Choose the Back button to return to the list of plans in which you are currently enrolled.</p>														
5.	<p>Click the Exit button to return to the Benefits and Payments window.</p>														

Procedure to display your payment information:

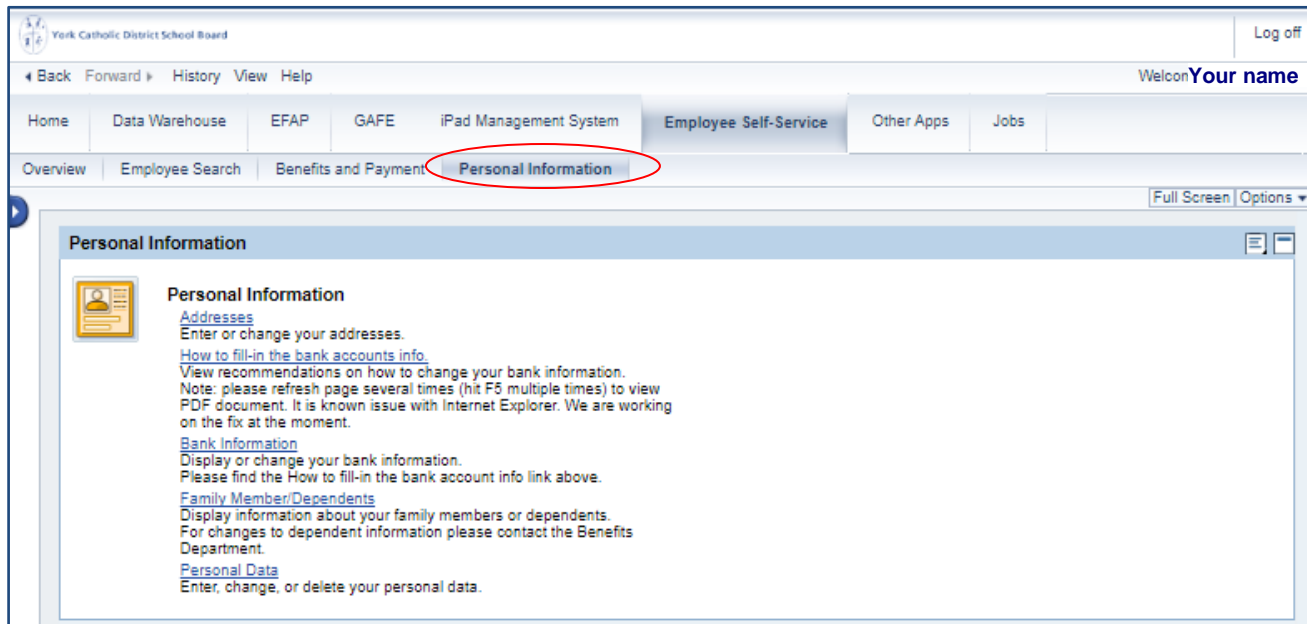
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2.	<p>Choose from the following links under the Payment section:</p> <table border="1"> <thead> <tr> <th>Link</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>How to read my salary statement (sample) *</td> <td>View recommendations on how to read your salary statement.</td> </tr> <tr> <td>Salary Statement</td> <td>View your latest salary statement. Note: <ul style="list-style-type: none"> • See Appendix E for instructions on how to view past salary statements. </td> </tr> <tr> <td>Salary Statement Details</td> <td>View your attendances and other info if applicable.</td> </tr> <tr> <td>Total Compensation Statement</td> <td>View your latest total compensation letter and statement. Note: Specify Date Range and choose Start.</td> </tr> <tr> <td>Personal Tax Credit</td> <td>Display or print the Personal Tax Credit Info.</td> </tr> <tr> <td>TD1 Personal Tax Credits Return</td> <td>View forms and recommendations on how to submit Personal Tax Credit Return</td> </tr> <tr> <td>View T4 Help Document *</td> <td>View a T4 help document containing: <ul style="list-style-type: none"> • Instructions for printing your T4('s). • Contact information should you require assistance. </td> </tr> <tr> <td>T4 Statement of Remuneration Paid</td> <td>Display or print the T4 Statement of remuneration paid. Note: <ul style="list-style-type: none"> • The Tax Forms T4 and T4A for current year will be available at the end of February of the following year as per CRA requirements. Note: <ul style="list-style-type: none"> • The printed copy of your T4 contains the word "DUPLICATE", however you may use it for your income tax filing. This is required as the Board cannot monitor the number of copies printed. </td> </tr> </tbody> </table> <p>* Press F5 (refresh) on your keyboard several times to display the PDF document.</p> <p>To exit any of the Payment links above, click the Exit button to return to the Benefits and Payments window.</p> <div style="display: flex; align-items: center;">  <p>Note: See Appendix D for instructions on printing your Salary Statement and Tax Forms.</p> </div>	Link	Description	How to read my salary statement (sample) *	View recommendations on how to read your salary statement.	Salary Statement	View your latest salary statement. Note: <ul style="list-style-type: none"> • See Appendix E for instructions on how to view past salary statements. 	Salary Statement Details	View your attendances and other info if applicable.	Total Compensation Statement	View your latest total compensation letter and statement. Note: Specify Date Range and choose Start.	Personal Tax Credit	Display or print the Personal Tax Credit Info.	TD1 Personal Tax Credits Return	View forms and recommendations on how to submit Personal Tax Credit Return	View T4 Help Document *	View a T4 help document containing: <ul style="list-style-type: none"> • Instructions for printing your T4('s). • Contact information should you require assistance. 	T4 Statement of Remuneration Paid	Display or print the T4 Statement of remuneration paid. Note: <ul style="list-style-type: none"> • The Tax Forms T4 and T4A for current year will be available at the end of February of the following year as per CRA requirements. Note: <ul style="list-style-type: none"> • The printed copy of your T4 contains the word "DUPLICATE", however you may use it for your income tax filing. This is required as the Board cannot monitor the number of copies printed.
Link	Description																		
How to read my salary statement (sample) *	View recommendations on how to read your salary statement.																		
Salary Statement	View your latest salary statement. Note: <ul style="list-style-type: none"> • See Appendix E for instructions on how to view past salary statements. 																		
Salary Statement Details	View your attendances and other info if applicable.																		
Total Compensation Statement	View your latest total compensation letter and statement. Note: Specify Date Range and choose Start.																		
Personal Tax Credit	Display or print the Personal Tax Credit Info.																		
TD1 Personal Tax Credits Return	View forms and recommendations on how to submit Personal Tax Credit Return																		
View T4 Help Document *	View a T4 help document containing: <ul style="list-style-type: none"> • Instructions for printing your T4('s). • Contact information should you require assistance. 																		
T4 Statement of Remuneration Paid	Display or print the T4 Statement of remuneration paid. Note: <ul style="list-style-type: none"> • The Tax Forms T4 and T4A for current year will be available at the end of February of the following year as per CRA requirements. Note: <ul style="list-style-type: none"> • The printed copy of your T4 contains the word "DUPLICATE", however you may use it for your income tax filing. This is required as the Board cannot monitor the number of copies printed. 																		

Personal Information

The ESS Personal Information tab allows employees to:


- display personal information and
- change personal information.



Procedure to display your payment information:

Follow the steps below search for employees by name and find basic information about colleagues.

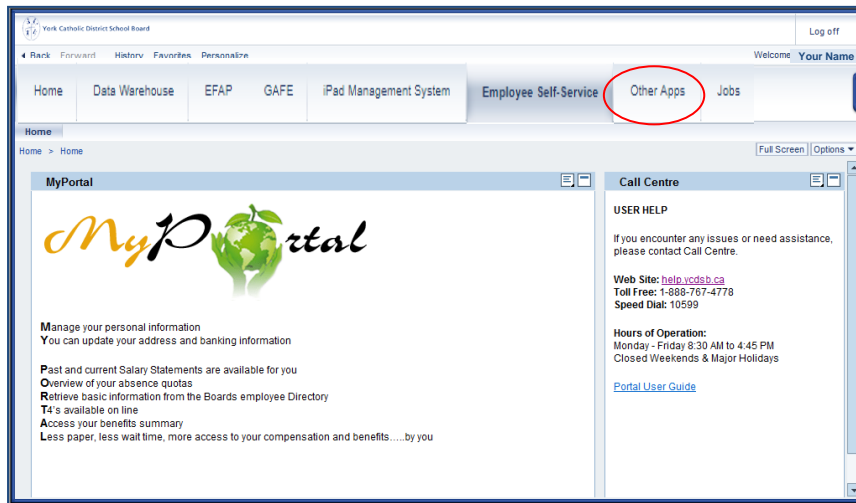
Step	Action
1.	<p>Upon logging onto My Portal:</p> <ul style="list-style-type: none">• Click the Employee Self-Service tab, and• Click the Personal Information sub tab. <p>Result: The Personal Information functions will be displayed in the tab contents.</p>

Step	Action												
2.	<p data-bbox="440 138 1317 170">Choose from the following links in the Personal Information window:</p> <table border="1" data-bbox="467 203 1502 648"> <thead> <tr> <th data-bbox="467 203 794 245">Click...</th> <th data-bbox="794 203 1502 245">To...</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 245 794 308">Addresses</td> <td data-bbox="794 245 1502 308">Display and update your current address.</td> </tr> <tr> <td data-bbox="467 308 794 386">How to fill-in the bank accounts info.</td> <td data-bbox="794 308 1502 386">View recommendations on how to change your bank information.</td> </tr> <tr> <td data-bbox="467 386 794 497">Bank Information</td> <td data-bbox="794 386 1502 497">Display and update your bank information. Please find the How to fill-in the bank account info link below.</td> </tr> <tr> <td data-bbox="467 497 794 604">Family Member/Dependents</td> <td data-bbox="794 497 1502 604">Display current information about your family members or dependents, eg. Spouse, Child, Emergency Contact.</td> </tr> <tr> <td data-bbox="467 604 794 648">Personal Data</td> <td data-bbox="794 604 1502 648">Enter, change, or delete your personal data</td> </tr> </tbody> </table> <p data-bbox="451 709 532 779">  </p> <p data-bbox="581 716 1511 779"> Note: You will need to follow up with the Benefits Department with any changes that were made to your personal information. </p> <p data-bbox="440 842 1523 905"> To exit any of the Personal Information links above, click the Exit button to return to the Personal Information window. </p>	Click...	To...	Addresses	Display and update your current address.	How to fill-in the bank accounts info.	View recommendations on how to change your bank information.	Bank Information	Display and update your bank information. Please find the How to fill-in the bank account info link below.	Family Member/Dependents	Display current information about your family members or dependents, eg. Spouse, Child, Emergency Contact.	Personal Data	Enter, change, or delete your personal data
Click...	To...												
Addresses	Display and update your current address.												
How to fill-in the bank accounts info.	View recommendations on how to change your bank information.												
Bank Information	Display and update your bank information. Please find the How to fill-in the bank account info link below.												
Family Member/Dependents	Display current information about your family members or dependents, eg. Spouse, Child, Emergency Contact.												
Personal Data	Enter, change, or delete your personal data												

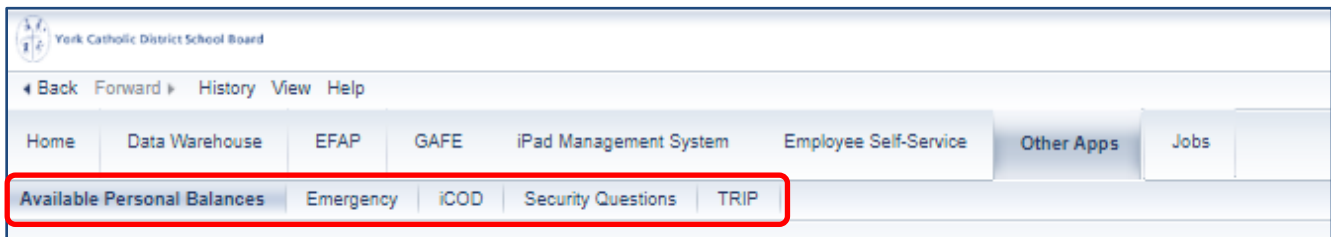
Other Apps Functions

Introduction

The Other Apps tab in My Portal contains a number of additional applications and will continue to grow as applications are added.



The following tabs are currently available in the Other Apps tab:



Contents

This section contains the following Other Apps functions:

Topic	The purpose of this topic is to...	See Page
Available Personal Balances	describe the procedures to display your "Available Personal Balances" within My Portal.	20
Security Questions	explain how to add optional Security Questions within My Portal.	21



Available Personal Balances

The purpose of this section is to:

- Describe the procedures to display your “Available Personal Balances” within My Portal.

Procedure to display your Available Personal Balances:

Follow the steps below to display your “Available Personal Balances” within My Portal.

Step	Action																														
1.	<p>Upon logging onto My Portal:</p> <ul style="list-style-type: none"> Click the Other Apps tab. <p>Result: Your Available Personal Balances will be displayed. Following is a sample:</p> <div data-bbox="451 701 1523 936" data-label="Table"> <p>Click a row to display the Quota Description.</p> <table border="1"> <thead> <tr> <th colspan="5">Available Personal Balances</th> </tr> <tr> <th>Benefit</th> <th>Allocation/Earned</th> <th>Amount Used</th> <th>Balance</th> <th>Units</th> </tr> </thead> <tbody> <tr> <td>Personal Leave 9.06(a)</td> <td>2</td> <td>0</td> <td>2</td> <td>Days</td> </tr> <tr> <td>Personal Leave 9.06</td> <td>--</td> <td>--</td> <td>1</td> <td>Days</td> </tr> <tr> <td>Sick Leave Days</td> <td>10</td> <td>0</td> <td>10</td> <td>Days</td> </tr> <tr> <td>Short Term Leave and Disability Plan</td> <td>120</td> <td>0</td> <td>120</td> <td>Days</td> </tr> </tbody> </table> <p>Export To Excel Display Quota Descriptions</p> </div> <p> Note:</p> <ul style="list-style-type: none"> Each employee’s benefits will be reflective of their Employee group. 	Available Personal Balances					Benefit	Allocation/Earned	Amount Used	Balance	Units	Personal Leave 9.06(a)	2	0	2	Days	Personal Leave 9.06	--	--	1	Days	Sick Leave Days	10	0	10	Days	Short Term Leave and Disability Plan	120	0	120	Days
Available Personal Balances																															
Benefit	Allocation/Earned	Amount Used	Balance	Units																											
Personal Leave 9.06(a)	2	0	2	Days																											
Personal Leave 9.06	--	--	1	Days																											
Sick Leave Days	10	0	10	Days																											
Short Term Leave and Disability Plan	120	0	120	Days																											
2.	<p>You may Click on a row to display that benefits description which will be displayed below the chart.</p> <p> Important: If any of your quotas are incorrect, please contact the Human Resources department.</p>																														

Security Questions

The feature of security questions has been added to the My Portal to add another level of security in addition to the “YCDSB Computer Logon Password Self-Service” program.



Note: The “Security Questions” within My Portal is an optional feature, should the user choose to add it.

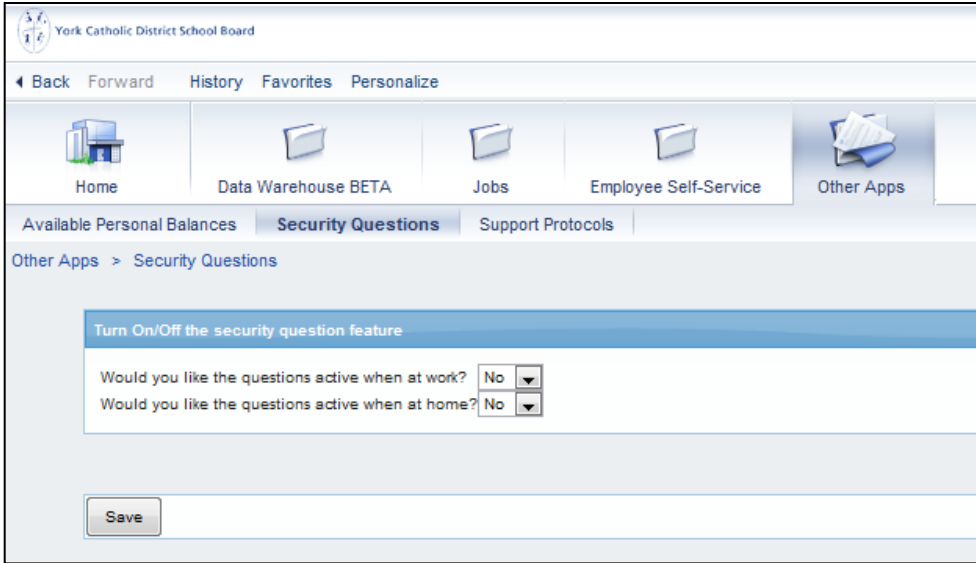
The Security Questions tab allows employees to add three (3) security questions whether they are accessing My Portal from:


- a Board computer, and or
- a computer outside of the Board.

The purpose of this section is to explain how to:

- add Security Questions within My Portal, and
- how to use the security questions.

Procedure to add security questions within My Portal:

Step	Action
1.	<p>Upon logging onto My Portal:</p> <ul style="list-style-type: none">• Click the Other Apps tab, and• Click the Security Question tab. <p>Result: The “Security Questions” window will be displayed:</p> 

Step	Action
2.	<p>Select Yes for either of the following dropdowns:</p> <ul style="list-style-type: none"> • Would you like the questions active when at work? • Would you like the questions active when at home? <p>Result: The three (3) questions will be displayed:</p> <div data-bbox="646 338 1198 919" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="background-color: #4F81BD; color: white; padding: 2px;">Turn On/Off the security question feature</p> <p>Would you like the questions active when at work? Yes <input type="button" value="v"/> Would you like the questions active when at home? No <input type="button" value="v"/></p> <hr/> <p style="background-color: #4F81BD; color: white; padding: 2px;">Please answer 3 security questions. Please note all 3 must be answered.</p> <p>Question 1: In which city or town was your mother born? <input type="button" value="v"/> Answer: <input type="text"/></p> <p>Question 2: In which city or town was your mother born? <input type="button" value="v"/> Answer: <input type="text"/></p> <p>Question 3: In which city or town was your mother born? <input type="button" value="v"/> Answer: <input type="text"/></p> <div style="background-color: #FFFF00; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> • You cannot have a duplicated question • All questions must have an answer </div> </div> <p> Note: The same questions apply for at work or at home.</p>
3.	<ul style="list-style-type: none"> • Click the dropdown from each question and choose a unique question. • Type the correct answer in the “Answer:” text box. • Repeat this for each of the three (3) questions. • Click elsewhere on the screen to display the Save button. • Click the Save button to save your questions. <p>Result: A message will be displayed that “The data has been saved.”</p>

Procedure to use the security questions within My Portal:

Step	Action
1.	<p>Upon logging onto My Portal in the location you chose to display the security questions, i.e.; at work and/or at home, you will be asked the 3 questions you chose.</p> <ul style="list-style-type: none"> • Answers the questions correctly. <p>Warning</p> <div data-bbox="444 1686 540 1780" style="float: left; margin-right: 10px;"> </div> <ul style="list-style-type: none"> • If you answer either of the questions wrong three (3) times, you will be locked out of logging onto My Portal and your computer. • You must then choose the <u>Forgot your password?</u> link from the My Portal logon page to reset your Computer logon password as outlined in Appendix B below. <p>Result: You will be logged onto My Portal.</p>




APPENDIX A

(from "First Time Logging Onto My Portal", Page 4)

Security Questions First Time Logging Onto My Portal:

Appendix A contains detailed instructions on how to complete the security questions the first time you are logging onto My Portal as mentioned on Page 4, Step 2 above.

Follow the steps below to complete the security questions:

1.	<p>Display the My Portal Logon page by:</p>  <ul style="list-style-type: none">• opening the Internet Explorer icon from your computer's desktop and typing the My Portal address in the address bar (https://myportal.ycdsb.ca), or select the My Portal Logon page from your Favourites, or• selecting the Staff tab from the Board website (www.ycdsb.ca), or• selecting the FirstClass Employee Area conference, then the My Portal conference and the My Portal weblink. <p>Result: The first time you log into My Portal, the Security Questions window will be displayed.</p> 
2.	<p>To complete the security questions:</p> <ul style="list-style-type: none">• type the last 3 digits of your SIN number in the appropriate text box,• press tab or click in the birthdate text box,• select the correct month, year and day from the pop up calendar, and• click the Submit button. <p>Result: You will successfully be logged into My Portal.</p>  <p>Note: You are only required to answer these questions once..</p>



APPENDIX B

(from “Forgot Your Password”, Page 4)

How to reset your Computer Logon password:

Appendix B contains instructions on how to change your password from the My Portal logon window in the event you forgot your computer logon password as mentioned on Page 4, Step 2 above. Follow the steps below to reset your computer logon password:

Step	Action						
1.	Display the My Portal Logon page (myportal.ycdsb.ca)						
2.	<p>Choose the <u>Forgot Your Password?</u> Link.</p> <p>Result: The “Password Reset:” window will be displayed requesting that you enter your user name in the text box provide and choose the Next button.</p> <div data-bbox="386 732 1344 1434" data-label="Image"> </div>						
3.	<table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>You have completed the Password Registration process</td> <td>the “Authentication Required” window will be displayed prompting you to answer three (3) of the questions you answered during the Password Registration process.</td> </tr> <tr> <td>You have not completed the Password Registration process</td> <td> <p>you will receive the following message:</p> <div data-bbox="683 1719 1456 1869" data-label="Image"> </div> <ul style="list-style-type: none"> Click the Self-Service Password Reset link to complete the password registration process. </td> </tr> </tbody> </table>	If...	Then...	You have completed the Password Registration process	the “Authentication Required” window will be displayed prompting you to answer three (3) of the questions you answered during the Password Registration process.	You have not completed the Password Registration process	<p>you will receive the following message:</p> <div data-bbox="683 1719 1456 1869" data-label="Image"> </div> <ul style="list-style-type: none"> Click the Self-Service Password Reset link to complete the password registration process.
If...	Then...						
You have completed the Password Registration process	the “Authentication Required” window will be displayed prompting you to answer three (3) of the questions you answered during the Password Registration process.						
You have not completed the Password Registration process	<p>you will receive the following message:</p> <div data-bbox="683 1719 1456 1869" data-label="Image"> </div> <ul style="list-style-type: none"> Click the Self-Service Password Reset link to complete the password registration process. 						

Step	Action
4.	<p>Answer the questions appropriately and click the Next button.</p> <p> Note: Answers are Case Sensitive.</p> <p> Warning: If you answer either of the questions wrong three (3) times, you may try again in 15 minutes. You may attempt this 3 times, at which time you will be locked out of logging on to your computer and must contact the Computer Call Centre.</p> <p>Result: The “Enter Your New Password” window will be displayed.</p>
5.	<p style="text-align: center;">Password Rules</p> <p>Your new password:</p> <ul style="list-style-type: none"> • must be at least eight (8) characters, • is case sensitive, and • must contain characters from three (3) of the following four (4) categories: <ul style="list-style-type: none"> ○ Uppercase characters (A through Z) ○ Lowercase characters (a through z) ○ Numeric characters (0 through 9) ○ Non alphanumeric characters: ~!@#%&*_+=`\'()\{\}[]:;'"<>,.?/ <p>Follow these steps to change your computer logon password:</p> <ul style="list-style-type: none"> • Type a new password in the “New password:” text box, • re-type the new password in the “Confirm new password:” text box, and • click the Reset button. <p>Result: You will be informed that you have successfully reset your computer logon password.</p>
6.	Click the Finish button.
7.	You may now log onto My Portal using your new computer logon password.

APPENDIX C

(from “ESS Overview”, Page 9)

My Portal Login Error Correction

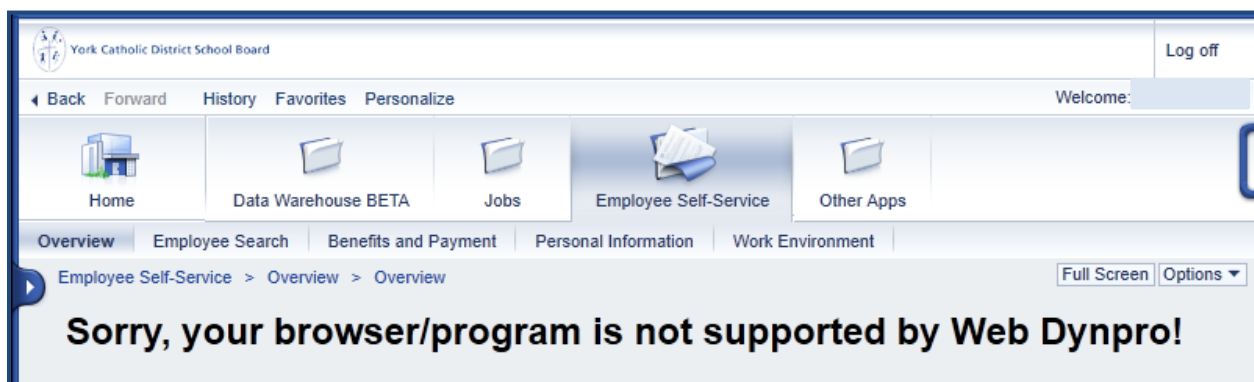
Appendix C contains instructions on how to correct the issue that may occur when selecting the Employee Self-Service tab in My Portal as mentioned on *Page 9 above*.

Compatibility issues exist in the SAP portal with the latest versions of Internet Explorer 9 and Firefox 8. This appendix contains corrections for users at home who may have such browsers.



Note: The browsers Google Chrome and Safari were tested with no issues.

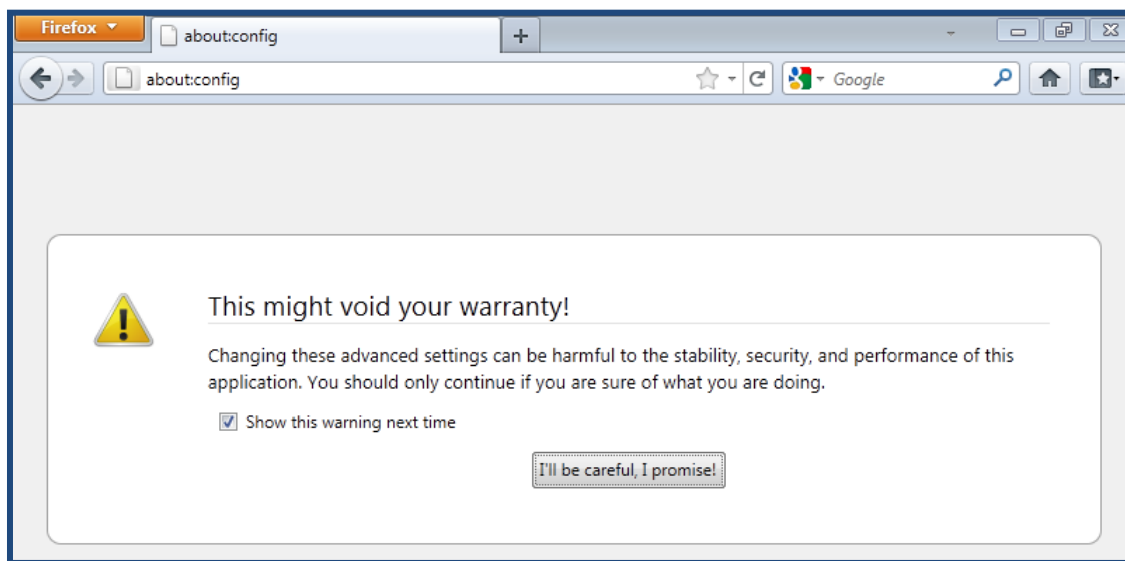
Upon selecting the Employee Self-Service tab, the following error may occur:



Procedure to correct the compatibility issue in Firefox 8:

1. Type **about:config** into the location bar in Firefox and press enter.

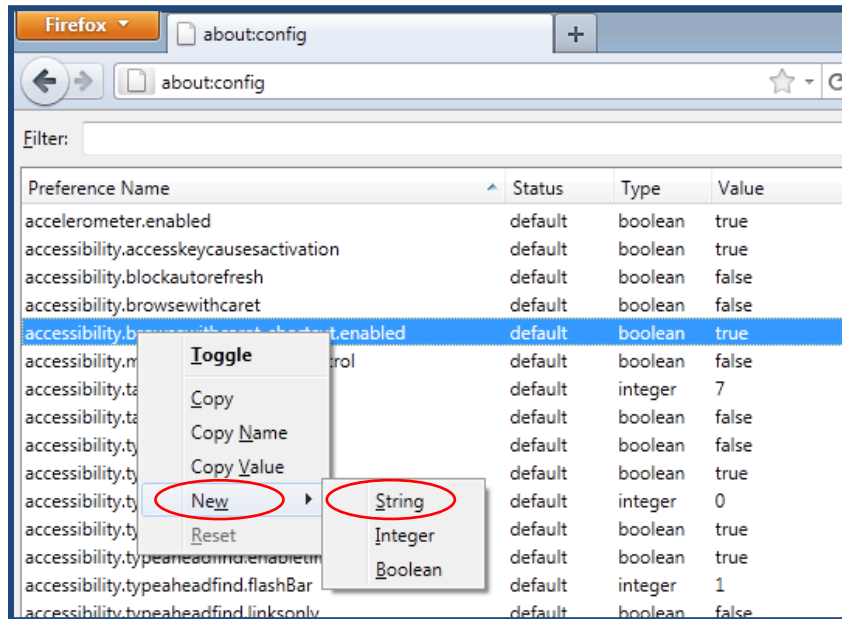
Result: The warranting warning will be displayed:



2. Click the “I’ll be careful, I promise!” button.

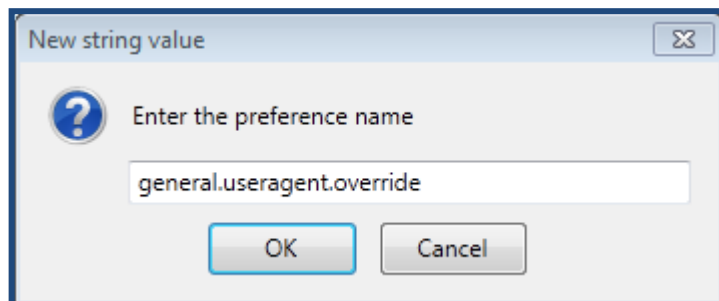
Result: A list of files will be displayed.

3. Right-click somewhere on that page and choose New and String.



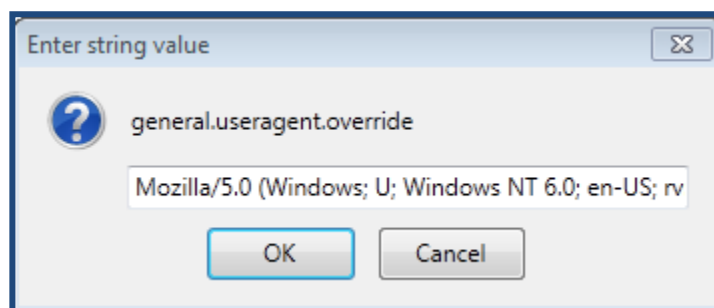
Result: The New string value window will be displayed.

4. Type the following in the “Enter the preference name” text box: general.useragent.override, and choose OK.



Result: The Enter string value window will be displayed.

5. Type the following in the “general.useragent.override” text box: Mozilla/5.0 (Windows; U; Windows NT 6.0; en-US; rv:1.9.2.8) Gecko/20100722 Firefox/3.6.8, and choose OK.



6. Close Firefox and re-open it and enter the portal URL again: <https://myportal.ycdsb.ca/> and log into My Portal.

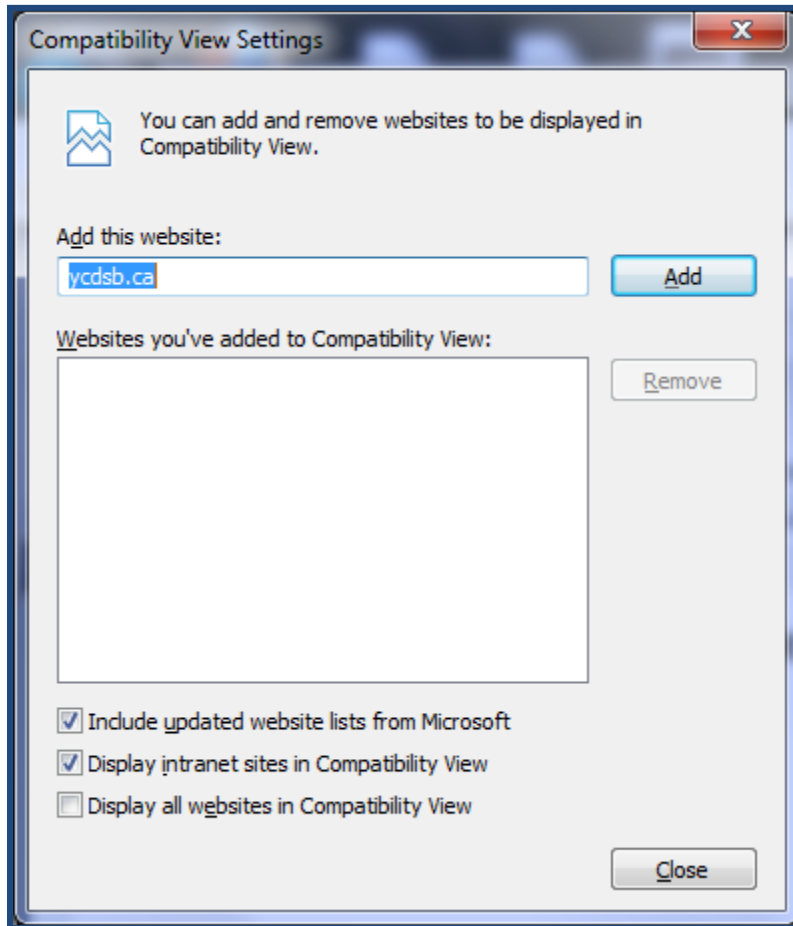


Note: You may experience a blank screen upon selecting the Employee Self-Service tab, however press F5 on your keyboard to refresh the browser. The Employee Self-Service tab should work properly now, although the refresh may be necessary each time.

Procedure to correct the compatibility issue in Internet Explorer 9:

1. In Internet Explorer 9, click on Tools and Compatibility View Settings.

Result: the Compatibility View Settings window will be displayed.



- 2.

If...	Then...
ycdsb.ca is listed under "Websites you've added to Compatibility View:"	click the Close button.
ycdsb.ca is not listed under "Websites you've added to Compatibility View:"	Type ycdsb.ca in the "Add this website:" text box, click the Add button and click the Close button.

3. Close Internet Explorer and re-open it and enter the portal URL again: <https://myportal.ycdsb.ca/> and log into My Portal.

APPENDIX D

(from "Procedure to display your payment information:", Page 15)

How to print your Salary Statement and Tax Forms

Appendix D contains instructions on how to print your Salary Statement and Tax Forms.

Follow the steps below to print your Salary Statement and Tax Forms:

1.	<p>Upon logging into My Portal:</p> <ul style="list-style-type: none"> Click the Employee Self-Service tab, and Click the Benefits and Payment sub tab. <p>Result: The Benefits and Payment functions will be displayed in the tab contents.</p>						
2.	<p>Display the form you wish to print as follows:</p> <table border="1" data-bbox="228 583 1528 758"> <thead> <tr> <th>To display your...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Salary Statement</td> <td>click the Salary Statement blue link. Result: The "Paycheck Inquiry Service" window will be displayed.</td> </tr> <tr> <td>Tax Form</td> <td>click the T4 Statement of remuneration paid blue link.</td> </tr> </tbody> </table>	To display your...	Then...	Salary Statement	click the Salary Statement blue link. Result: The "Paycheck Inquiry Service" window will be displayed.	Tax Form	click the T4 Statement of remuneration paid blue link.
To display your...	Then...						
Salary Statement	click the Salary Statement blue link. Result: The "Paycheck Inquiry Service" window will be displayed.						
Tax Form	click the T4 Statement of remuneration paid blue link.						
3.	<p>You may print the required form in one of two ways:</p> <ol style="list-style-type: none"> Scroll down to view the form, and <ul style="list-style-type: none"> right-click on the form, and choose Print from the pop up menu. <div data-bbox="878 869 1247 1199"> </div> <p>Or,</p> <ol style="list-style-type: none"> Depending on your computer's Operating System: <table border="1" data-bbox="228 1241 1528 1751"> <thead> <tr> <th>If your computer is...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Windows XP</td> <td> <ul style="list-style-type: none"> click the Print icon in the toolbar displayed above the form. <div data-bbox="467 1377 1511 1444"> </div> <p>Result: The form will be printed.</p> </td> </tr> <tr> <td>Windows 7</td> <td> <ul style="list-style-type: none"> scroll down to the bottom of the form, move your cursor on the form to display the toolbar, and click the Print icon. <div data-bbox="646 1629 1338 1724"> </div> <p>Result: The form will be printed.</p> </td> </tr> </tbody> </table>	If your computer is...	Then...	Windows XP	<ul style="list-style-type: none"> click the Print icon in the toolbar displayed above the form. <div data-bbox="467 1377 1511 1444"> </div> <p>Result: The form will be printed.</p>	Windows 7	<ul style="list-style-type: none"> scroll down to the bottom of the form, move your cursor on the form to display the toolbar, and click the Print icon. <div data-bbox="646 1629 1338 1724"> </div> <p>Result: The form will be printed.</p>
If your computer is...	Then...						
Windows XP	<ul style="list-style-type: none"> click the Print icon in the toolbar displayed above the form. <div data-bbox="467 1377 1511 1444"> </div> <p>Result: The form will be printed.</p>						
Windows 7	<ul style="list-style-type: none"> scroll down to the bottom of the form, move your cursor on the form to display the toolbar, and click the Print icon. <div data-bbox="646 1629 1338 1724"> </div> <p>Result: The form will be printed.</p>						



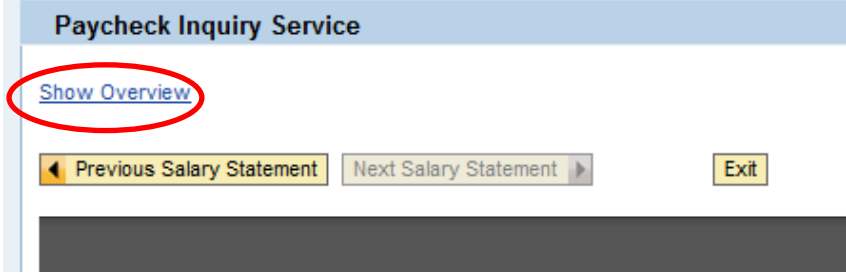
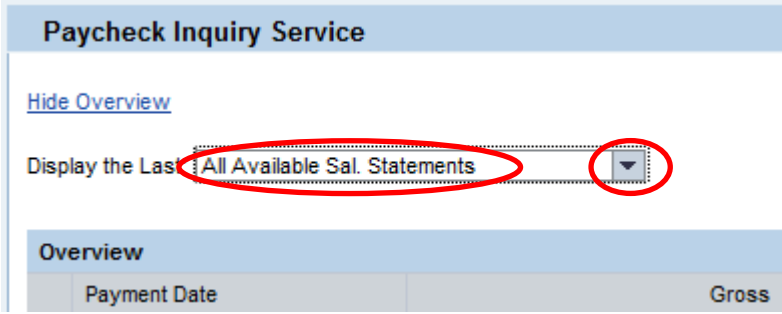
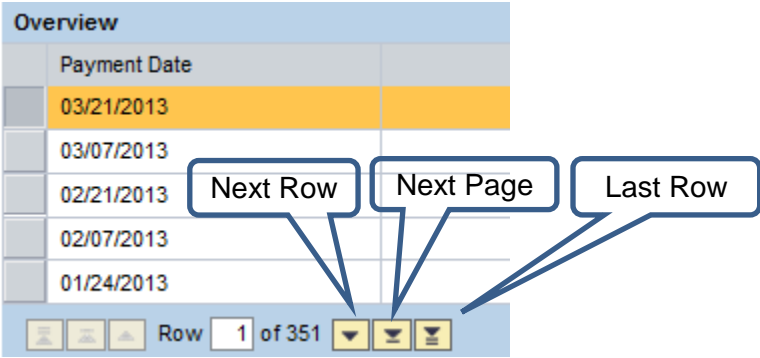
Note: The printed copy of your T4 contains the word "DUPLICATE", however you may use it for your income tax filing. This is required as the Board cannot monitor the number of copies printed.

APPENDIX E

(from "Procedure to display your payment information:", Page 15)

How to view past Salary Statements

Follow the steps below to print your Salary Statement and Tax Forms:

1.	<p>Upon logging into My Portal:</p> <ul style="list-style-type: none">• Click the Employee Self-Service tab,• click the Benefits and Payment sub tab, and• click the Salary Statement blue link. <p>Result: The Paycheck Inquiry Service window will be displayed in the tab contents.</p> 
2.	<p>Click the Show Overview blue link.</p> <p>Result: The "Overview section" will be displayed within the "Paycheck Inquiry Service" window.</p> 
3.	<p>Click on dropdown arrow beside "Display the Last:" and choose "All Available Sal. Statements".</p> <p>Result: A list of past "Payment Dates" will be displayed in the "Overview section".</p> 
4.	<ul style="list-style-type: none">• Choose the appropriate buttons to view the required "Payment Date".• Click on the required "Payment Date:" to display the salary statement.