Version 2.0–2.0-1

Getting Started with ADP Workforce Now™

Quick Reference

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Contents

Introduction **1**
What You Do as a Portal Administrator 1
How to Use This Guide 1
Where to Find Guides in ADP Workforce Now 2
Where to Find Guides in the ADP Support Center. 2

Before You Begin **5**
Log On to ADP Workforce Now. 5
Take Training 6

Customize Your Site **9**
Task 1: Decide What You Want to Display 9
Task 2: Add Your Content 9
Task 3: Choose a Site Theme 10
Task 4: Determine Who Should See What 12
Task 5: Set Up Workflows 14
Task 6: Set Up New Hire Templates and Checklists 14
Task 7: Set Up Employee Events. 14

Roll Out ADP Workforce Now **16**
Task 1: Test Your Site. 16
Task 2: Announce Your Site 16
Task 3: Use Promotional Items to Build Web Site Awareness 18
Task 4: Develop a Way to Gather/Address Feedback 18
Task 5: Consistently Evaluate and Update Your Site. 18

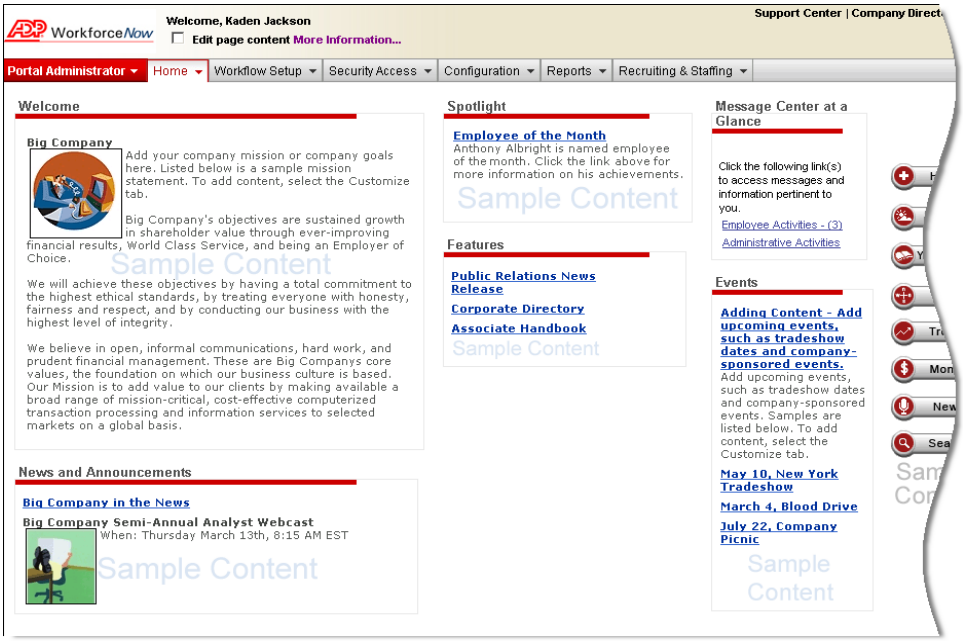
Frequently Asked Questions **19**
Customizing Your Site 19
Using Your Site. 19
Running a Registration Status Report 19
Distributing Company Policies 20
Installing Adobe Reader. 20

Introduction

ADP Workforce Now™ is a web-based, fully integrated workforce management solution that gives your organization a single point of access to payroll, HR and benefits, and time and attendance information. This secure, easy-to-use solution gives you everything you need to maximize your workforce and communicate with your employees.

ADP Workforce Now is tailored to meet the needs of your business. Therefore, menus and menu options that you see will vary based on your role and the services your company is using.

Customize ADP Workforce Now with your company's information, which can include graphics, text, and links.



What You Do as a Portal Administrator

As an ADP Workforce Now portal administrator, you set up your site so that employees can access important company information and receive additional benefits such as the ability to view personal information and, if possible, update it. In addition, you can customize your site with graphics, colors, and fonts that match the look and feel of your own company's branding.

You also have the important task of controlling what your employees see based on their job responsibilities.

How to Use This Guide

Getting Started with ADP Workforce Now™: Quick Reference outlines the setup tasks you perform as a portal administrator. Use this guide in conjunction with the *ADP Workforce Now™ Portal Administrator Guide,* which provides detailed instructions to help you complete most of these setup tasks.

Where to Find Guides in ADP Workforce Now

The *Getting Started with ADP Workforce Now™: Quick Reference* and the *ADP Workforce Now™ Portal Administrator Guide* are both available on the ADP Workforce Now site. To access them, do the following:

1 Point to the Role Selector and select **Portal Administrator**.

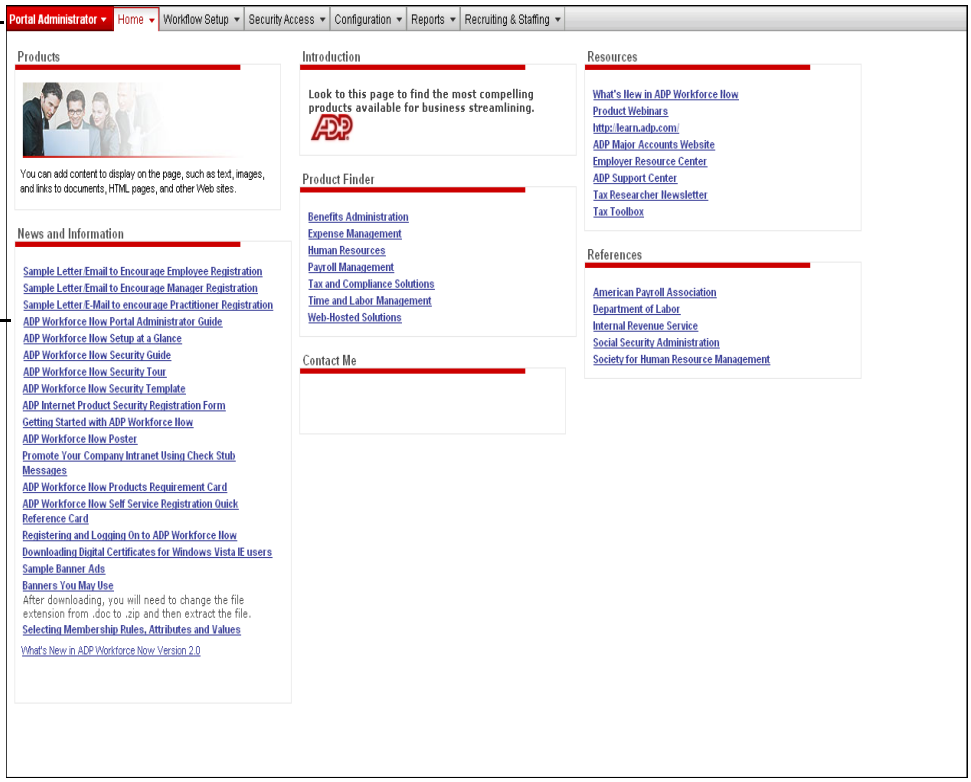
> **Important:** You must have the Portal Administrator role selected to access administrator resources.

2 Point to **Home** and select **Administrator Resources**.

3 View the documents in the **News & Information** area of the page.

Select your role here.

View and download portal administrator resources here.



Where to Find Guides in the ADP Support Center

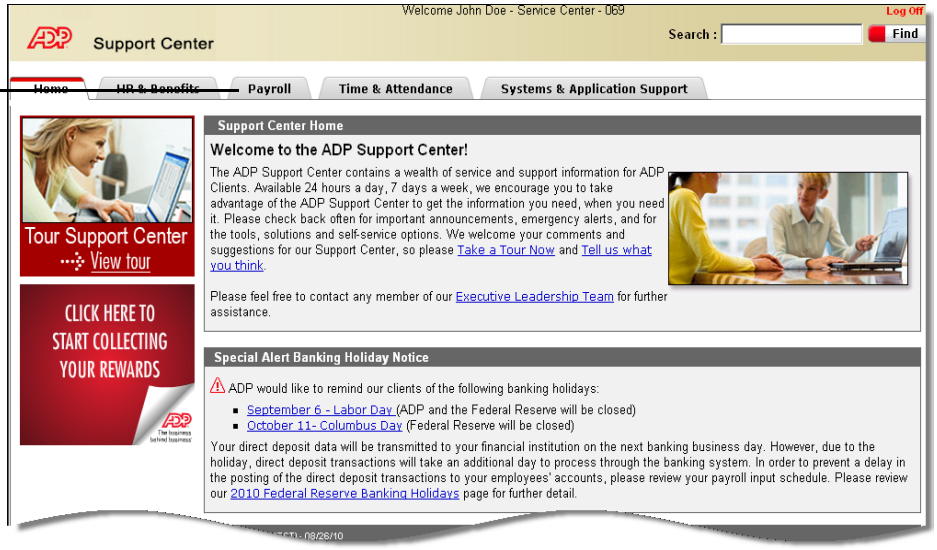
The *Getting Started with ADP Workforce Now™: Quick Reference* and the *ADP Workforce Now™ Portal Administrator Guide* are both available in the ADP Support Center. To access them, do the following:

1 In ADP Workforce Now, point to the Role Selector and select **Portal Administrator**.

2 Click **Support Center** in the header at the top right of the site.

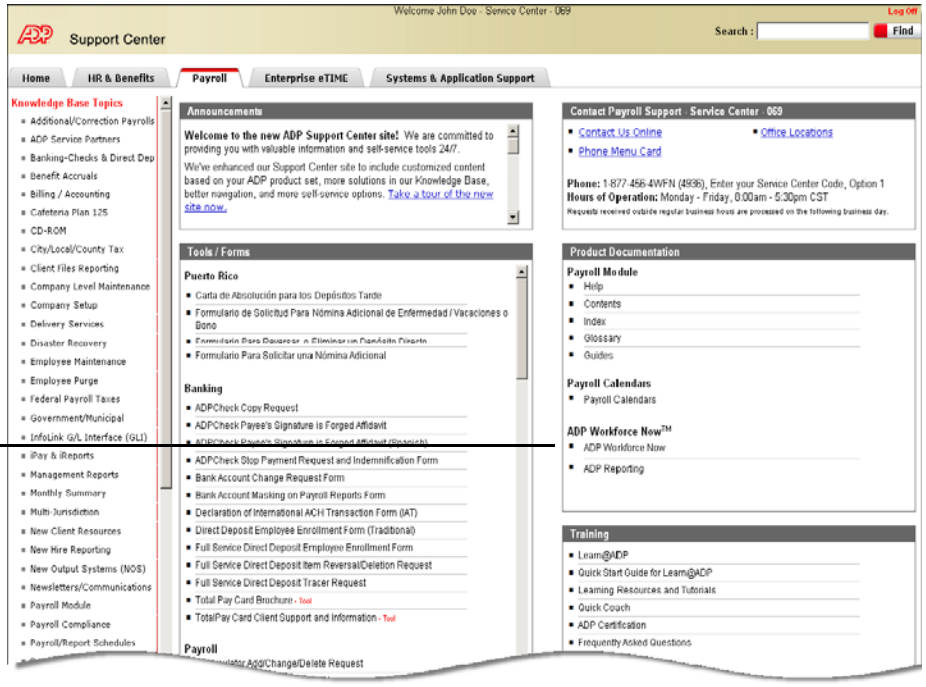
3 In the Support Center, select any module tab.

This is a module tab.



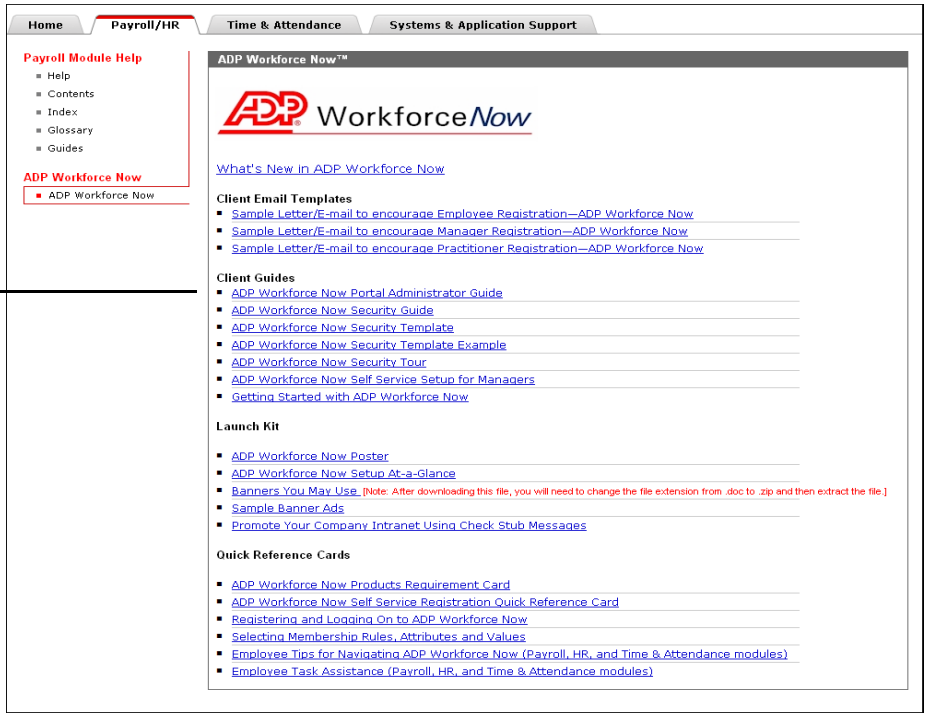
4 In the **Product Documentation** area, click **ADP Workforce Now**.

Select **ADP Workforce Now** *here.*



5 Locate your resources in the **Client Guides** area.

View and download your guides here.



Before You Begin

Log On to ADP Workforce Now

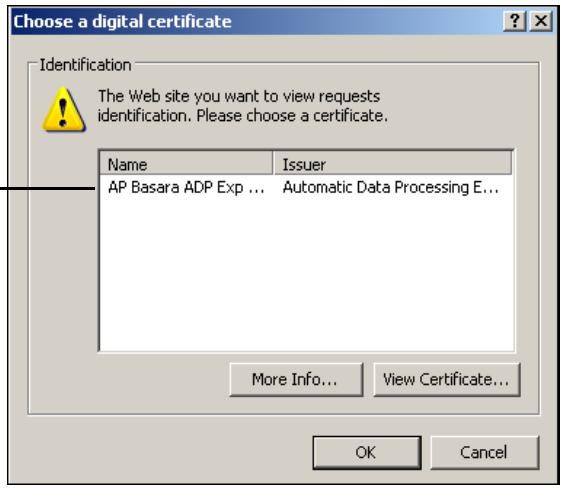
Important: Pop-up blockers may interfere with the display of valid pop-up windows (confirmations, forms, reports). ADP recommends that you disable pop-up blockers or set up your pop-up blocker to allow pop-ups for this site.

After you download your digital certificate, you can log on to ADP Workforce Now. For information about how to download your digital certificate, refer to the *ADP Netsecure Digital Certificates Quick Reference Card*.

Important: Be sure to log on the computer where you downloaded your digital certificate. If you use a different computer, you will not be able to log on.

1. Go to: **https://portal.adp.com**
2. Click **Administrator Login**.
3. In the Choose a digital certificate window, select the certificate that was issued to you for your access to ADP Workforce Now, and click **OK**.

The digital certificate is labeled with your first name, last name, ADP, and the expiration date of the certificate.



4 In the Connect window, enter your user ID and password, and then click **OK**.

This check box is disabled for added security. You cannot select this option.

Result: The ADP Workforce Now home page is displayed.

5 Save the address in your Favorites list for quick and easy access. (In Internet Explorer, select **Favorites**, and then select **Add to Favorites**.)

6 Depending on how your company is set up, for additional security, you may be asked to verify your identity the first time you attempt to log on to ADP Workforce Now.

Note: This information is only used to verify your identity. It is not used for any other purpose.

Trouble logging on?

If you have trouble logging on to ADP Workforce Now, try the following:

1 If you forgot your password, contact your client support specialist.

2 Check the spelling and spacing of your password. Passwords are case sensitive.

3 Close your browser and try logging on again.

If you cannot successfully log on after doing all of the above, contact your client support specialist and ask to have your password reset. After your password is reset, you will receive an e-mail message containing a temporary password.

Take Training

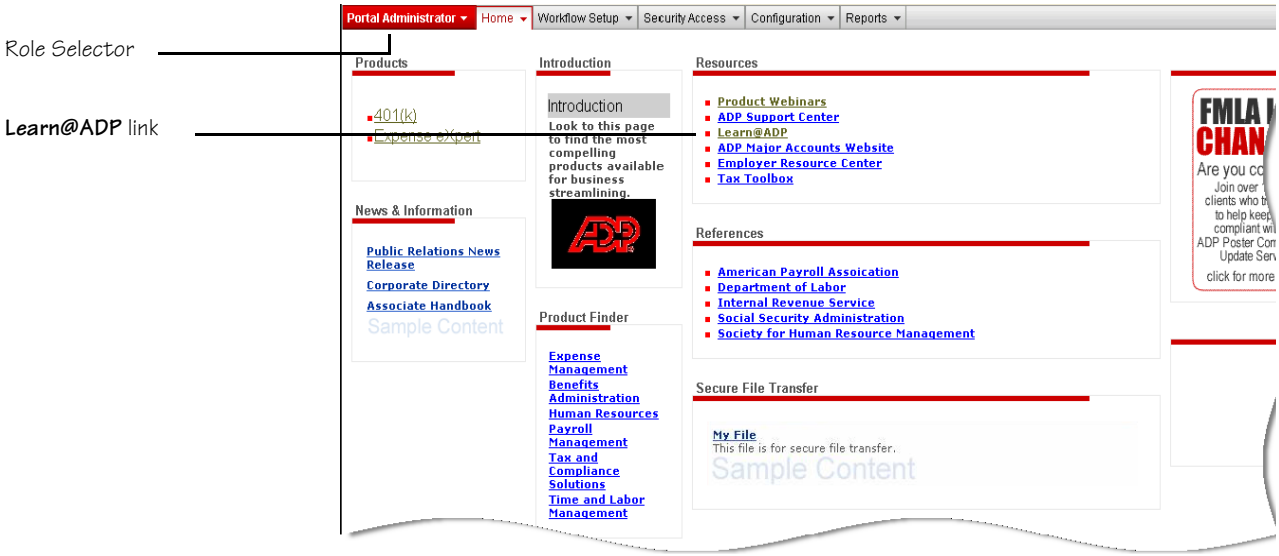
ADP Workforce Now provides you with online training to assist with setting up and using your site effectively. Training is available on Learn@ADP to help you complete portal administrator tasks. To access this training, do the following:

1 Point to the Role Selector and select **Portal Administrator**.

Important: You must have the Portal Administrator role selected to access administrator training and customize your site.

2 Point to **Home** and select **Administrator Resources**.

3 In the **Resources** area of the page, click **Learn@ADP**.



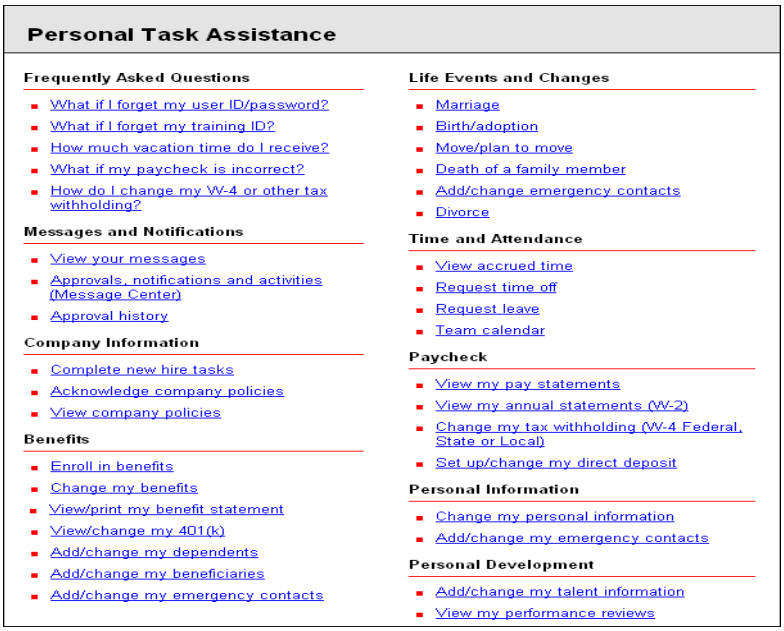
You can also access training for portal administrators in the ADP Support Center. Here, you can find guides, training materials, and additional support information. To get to the ADP Support Center, point to the Role Selector in ADP Workforce Now and select **Portal Administrator**. Next, click **Support Center** in the header at the top right of the site.

Assistance for Other Users

ADP Workforce Now offers task assistance for employees, managers, and practitioners. Task assistance is an easy-to-use reference that contains information on job-related or personal tasks. For example, managers may use task assistance to learn how to promote an employee. Newly married employees may use task assistance to find out how to make changes to their personal information.

Users access task assistance from the **Support** menu in the header at the top right of the site. The content they see is based on their role.

Employees view this screen after they select the task assistance option from the **Support** menu.



Tip: To make employees aware of task assistance, distribute the *Employee Task Assistance* quick reference card. This resource is located in the ADP Support Center. (Refer to "Where to Find Resources in the ADP Support Center" on page 16 for help getting to the ADP Support Center and accessing quick reference cards.)

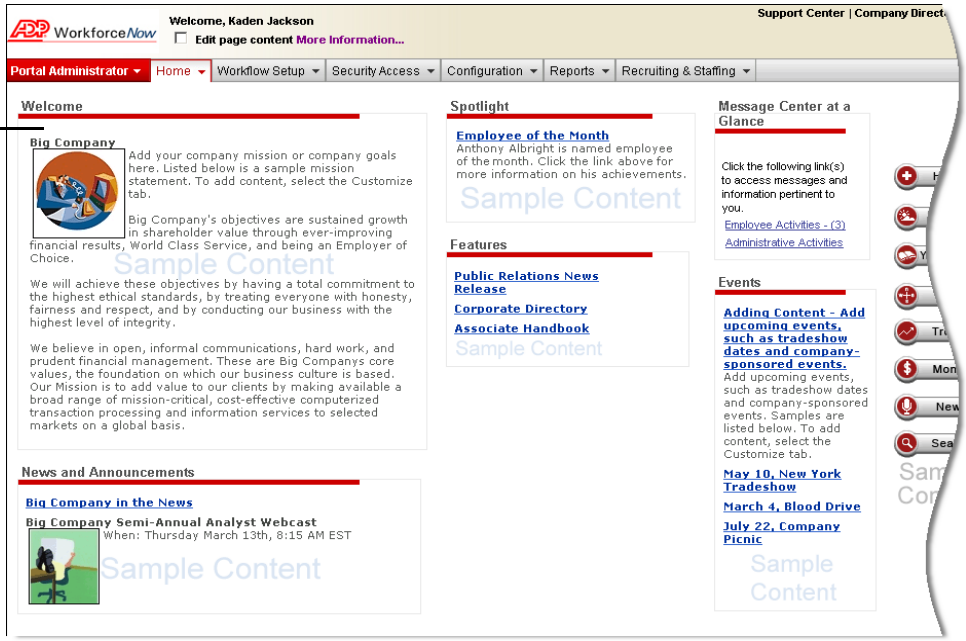
Customize Your Site

The following tasks need to be completed to set up ADP Workforce Now for your company. Your *ADP Workforce Now™ Portal Administrator Guide* provides detailed instructions for completing most of these tasks, unless specified otherwise in this section. Your client support specialist can assist you or answer any questions you may have.

Task 1: Decide What You Want to Display

On the **Home** menu, review the Welcome and Resources pages to get an idea about information your company may want to include on the site. For example, after reviewing the sample site, you may decide to include your mission statement, latest news or events, and company policies.

The Welcome page displays a sample mission statement.

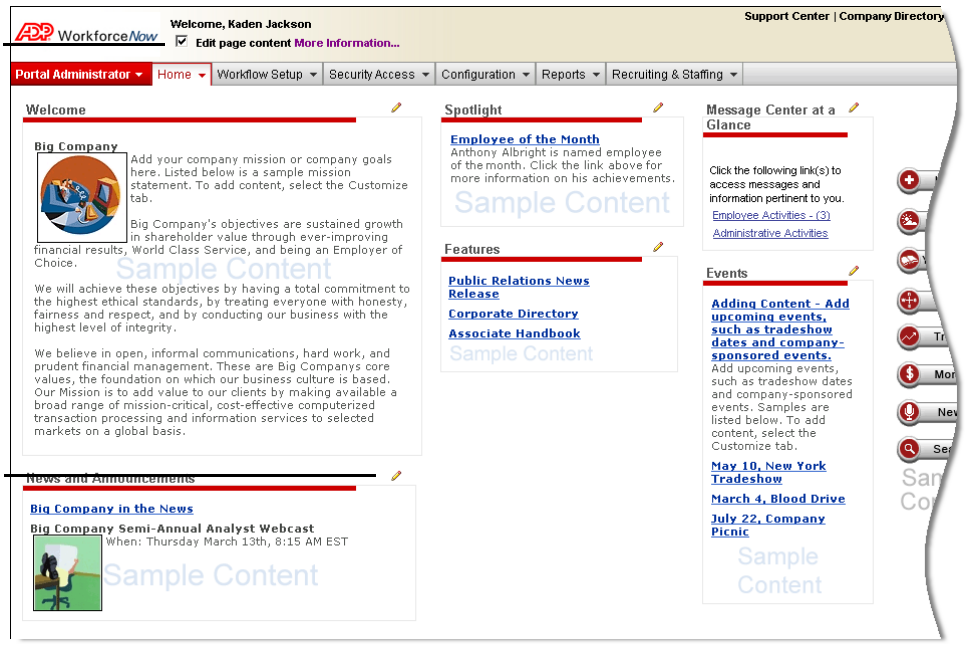


Task 2: Add Your Content

Click to select the **Edit page content** check box in the header at the top left of the site. **Configure** (pencil) icons display to indicate the areas you can customize.

Add the company information you want on the site by clicking (**Configure**) in the area of the page you want to update. For details, refer to your *ADP Workforce™ Now Portal Administrator Guide*.

Select this check box to view all the areas you can customize.

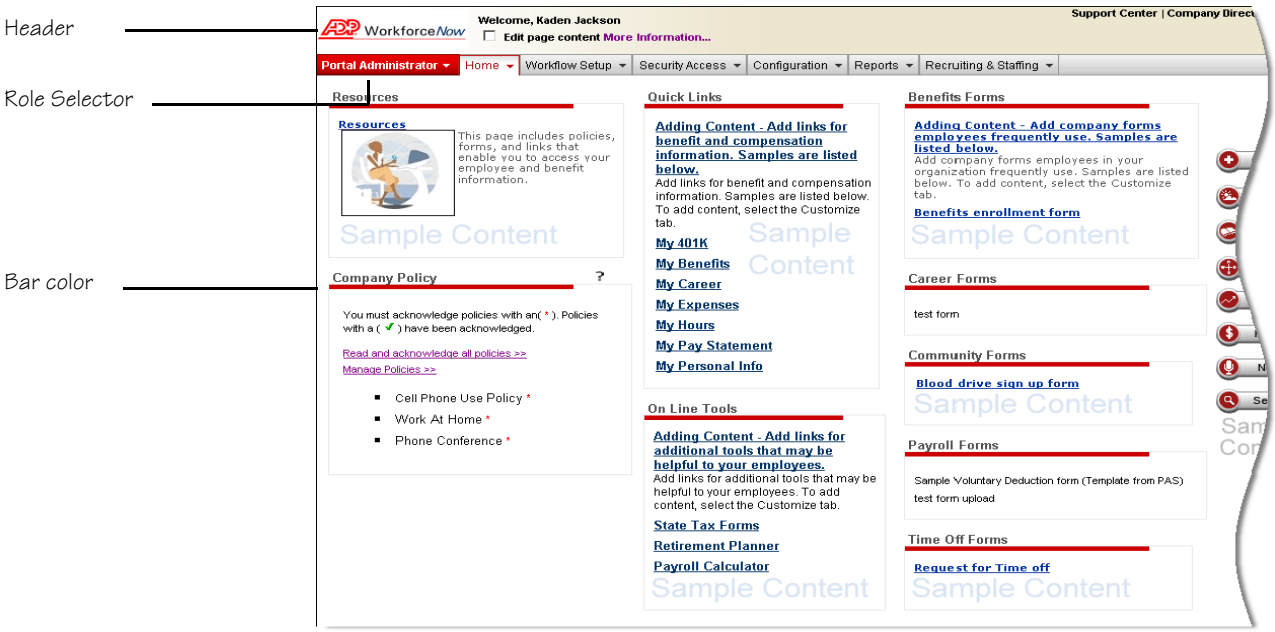


Click the **Configure** icon in the area of the page you want to customize.

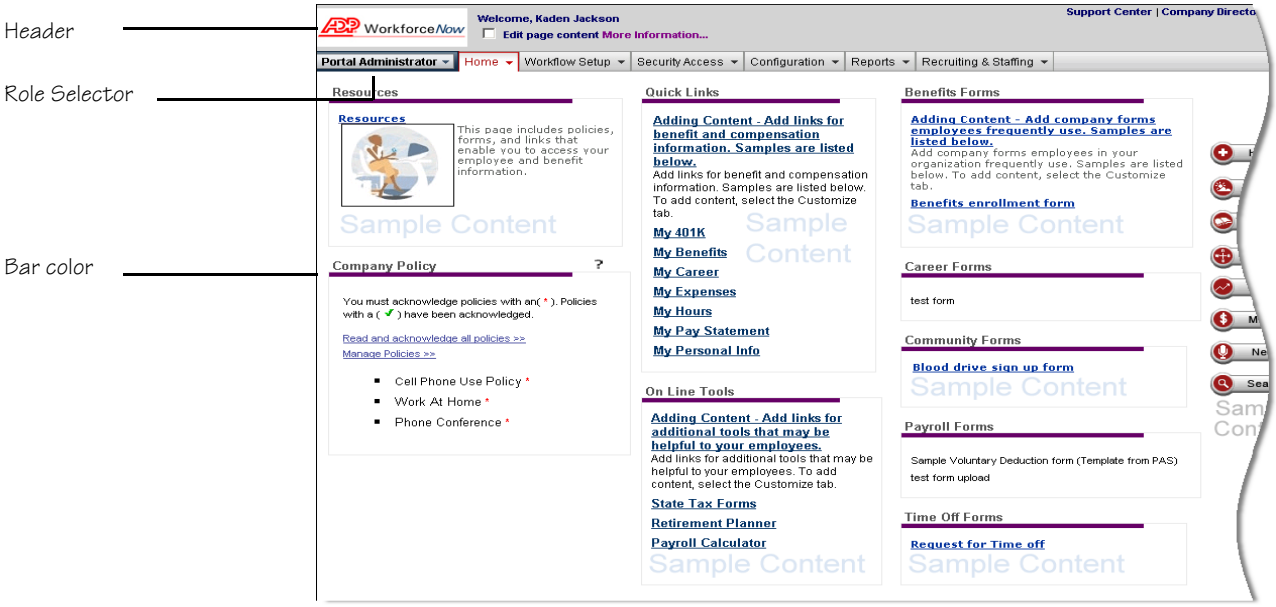
Task 3: Choose a Site Theme

With ADP Workforce Now, you can change the colors that display throughout the site. You can choose from three standard themes that ADP provides for you: the ADP Classic Theme, the Blue Theme, and the Silver Theme. By default, the ADP Classic Theme is applied to your site. You can also create your own theme by customizing the text and background color in your header, choosing a Role Selector style, and changing the bar color in certain areas of the page (portlets).

ADP Classic Theme



Custom Theme



Task 4: Determine Who Should See What

One of your most important tasks as a portal administrator is to assign your employees to the correct security groups. Doing so controls who in your organization sees what information. For example, you may not want your employees to access manager tasks. To help with this activity, ADP provides the following default security groups:

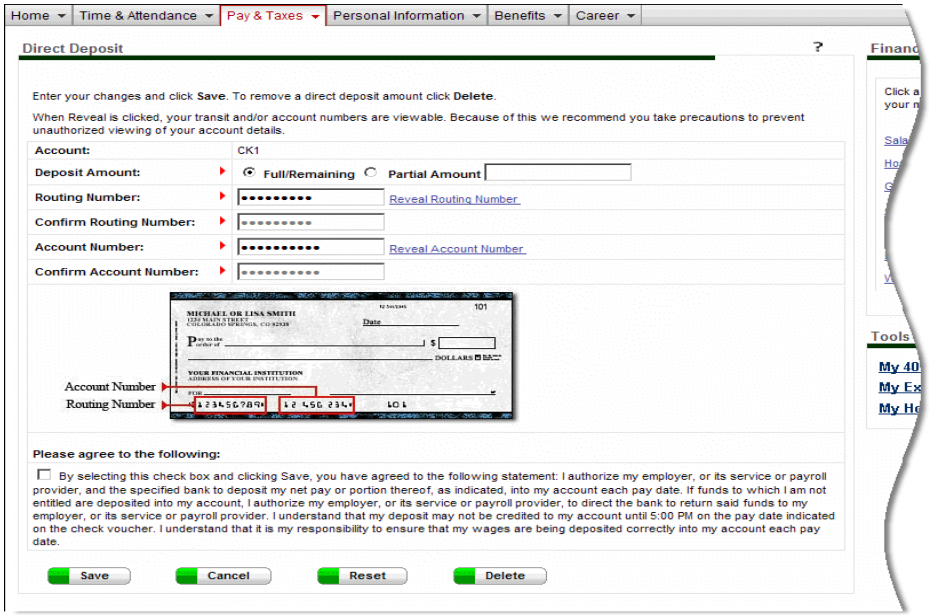
- Employee - Users in this group view and update personal information.
- Manager - Users in this group supervise employee tasks and manage work events.
- Practitioner - Users in this group add and modify content related to HR and benefits, payroll, and time and attendance data.
- Administrator (Portal Administrator) - Users in this group control user privileges and the appearance of the ADP Workforce Now Web site.

ADP may also provide automatically created custom security groups, depending on the combination of modules your company is using. The menus and menu options that users see in ADP Workforce Now are based on the security group(s) to which they are assigned.

You can change permissions for a security group or create your own custom security groups. For details, refer to your *ADP Workforce Now™ Security Guide.*

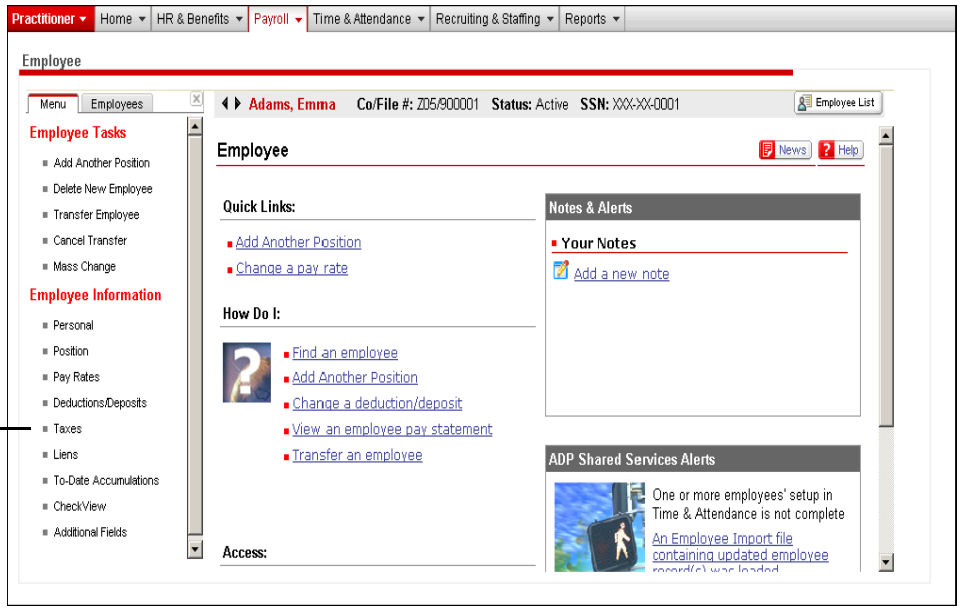
Sample Employee Role

Employees may be able to enter their direct deposit information, depending on how their company is set up.



Sample Practitioner Role

Practitioners may be able to change tax information for employees, depending on how they are set up.



Task 5: Set Up Workflows

A workflow controls the approval and routing of events in ADP Workforce Now. It enables you to establish checks and balances appropriate for your company. Your *ADP Workforce™ Now Portal Administrator Guide* provides detailed instructions for defining work groups and setting up workflows.

Task 6: Set Up New Hire Templates and Checklists

Important: To perform this task, your company must be set up with the New Hire feature.

The ADP Workforce Now New Hire feature allows you to set up templates that designated practitioners use to enter new hires in the New Hire Wizard. Information entered in the New Hire Wizard flows to the appropriate modules, so employees are hired in one, unified way.

When you set up a new hire template, you can specify details such as which steps are required and the order they will be performed, which practitioners will complete each step, and whether approval is required to complete a new hire.

The New Hire feature also allows you to create checklists to track new hire tasks, such as ordering a computer or providing training manuals to a new hire. Checklists are assigned to a specific user or security group.

For details, refer to your *ADP Workforce Now™ Template Management Quick Reference* and *ADP Workforce Now™ New Hire Custom Template Fields Quick Reference Card*.

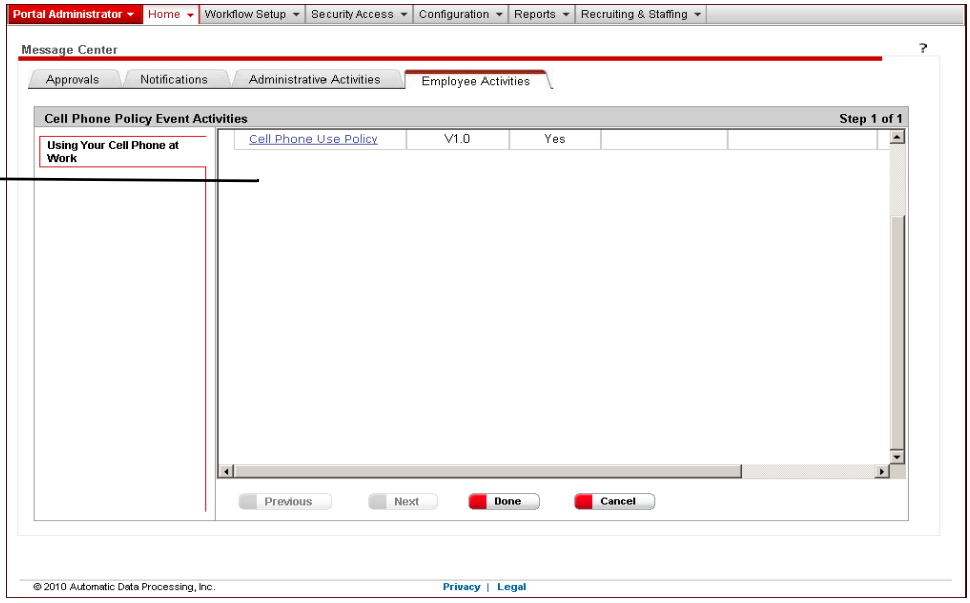
Task 7: Set Up Employee Events

You can set up employee events to distribute company policies to employees, help new employees complete new hire tasks, and verify existing employees' information at important times of the year. You can specify an end date for completing an event, send notifications to assigned employees, and view reports to monitor employee progress.

Employees receive events that are assigned to them on the start date you provide. These events are displayed in their Employee Activities list on the Message Center page. For details, refer to your *ADP Workforce Now™ Portal Administrator Guide*.

This example shows what employees see when they open a company policy event.

Employees view the content here. They can read the actual policy by clicking the policy name.



Roll Out ADP Workforce Now

Before you roll out your site, speak with your client support specialist so he or she can answer any questions that you may have. After you speak to your client support specialist, perform the following tasks.

Task 1: Test Your Site

Check the security groups you set up and make sure that your employees can see only what you want them to view on the site. Introduce your site to a few employees from different security groups, then evaluate and implement any feedback you receive.

Task 2: Announce Your Site

The ADP Support Center provides several resources to help you announce your site, such as e-mail templates and quick reference cards. For example, a company-wide e-mail can be sent to tell employees how they can register online and log on to the site. The *ADP Workforce Now™ Self Service Registration* quick reference card can be included in the new hire package.

Many of these resources can be printed out and shared with employees and managers. A kick-off meeting can also be held, during which these quick reference cards are distributed:

- *Employee Tips for Navigating ADP Workforce Now*
- *Registering and Logging On to ADP Workforce Now*
- *Employee Task Assistance*

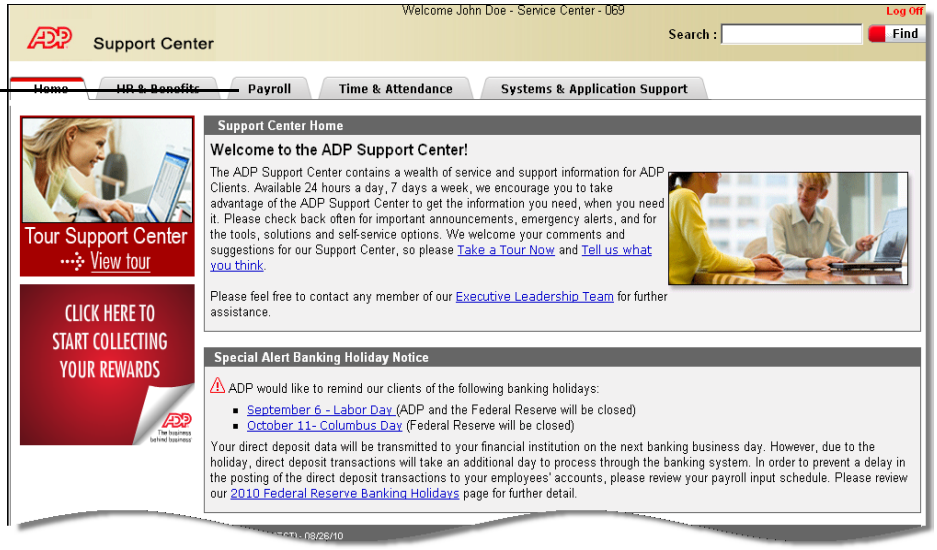
Where to Find Resources in the ADP Support Center

To access resources in the ADP Support Center, do the following:

1. In ADP Workforce Now, point to the Role Selector and select **Portal Administrator**.
2. Click **Support Center** in the header at the top right of the site.

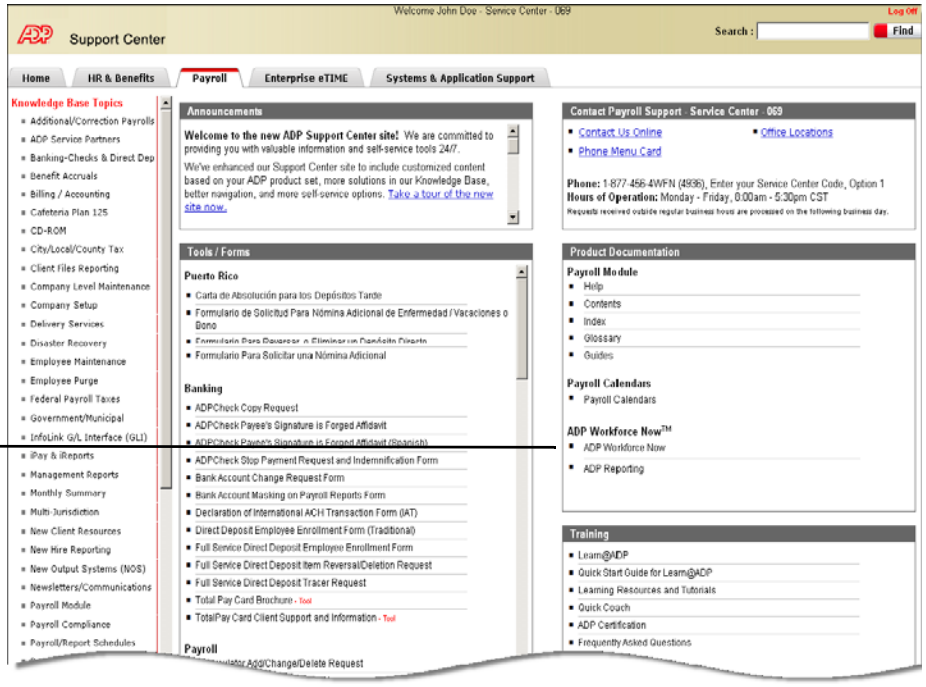
3 In the Support Center, select any module tab.

This is a module tab.

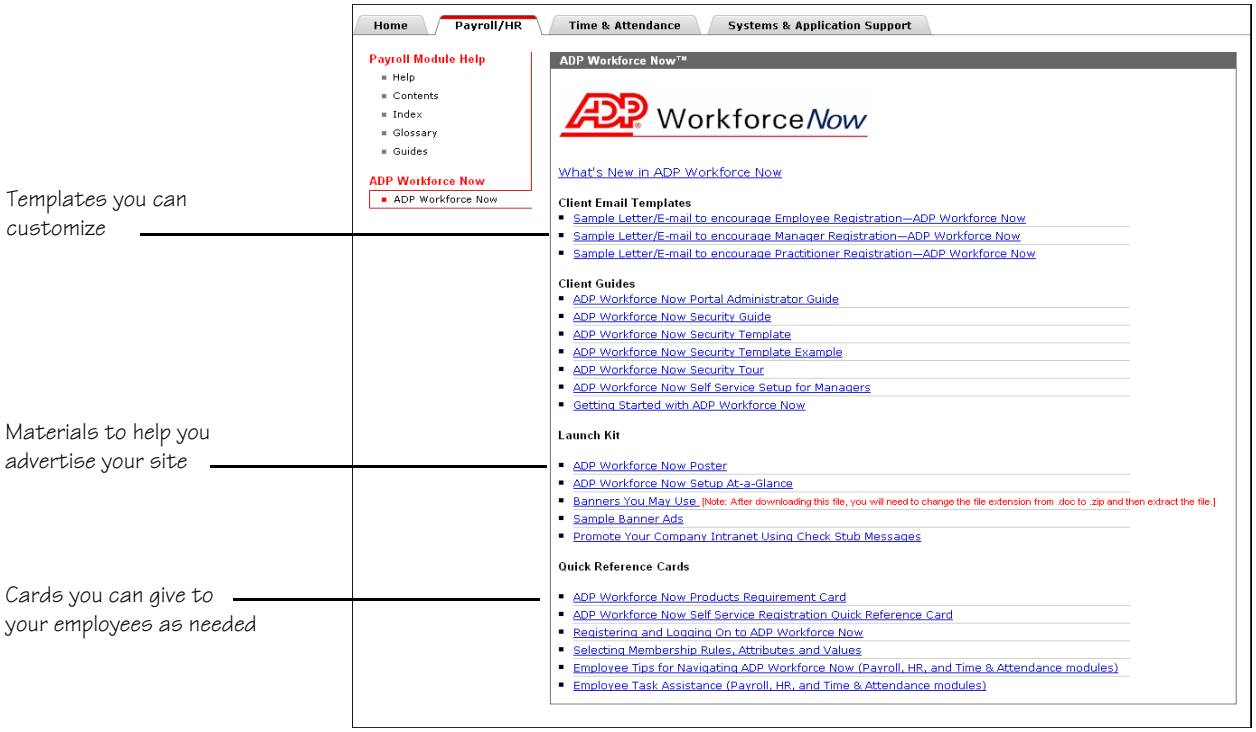


4 In the **Product Documentation** area, click **ADP Workforce Now**.

Select **ADP Workforce Now** *here.*



5 Locate your resources.



Task 3: Use Promotional Items to Build Web Site Awareness

Promotional items, such as posters, tent cards, and other customizable giveaways that contain your company logo can serve as a vivid way to enhance your site announcement message.

Tip: Place promotional items in high-traffic areas, such as in the cafeteria, in the main hallway, next to the elevator, and in the Human Resources Department.

Task 4: Develop a Way to Gather/Address Feedback

Gathering feedback will help you address employee needs and make the site more effective. Some ways of gathering feedback can include sending a survey or questionnaire to your employees, or placing suggestion boxes in high-traffic areas.

Task 5: Consistently Evaluate and Update Your Site

Allow some time each week to evaluate your site. Review feedback you have received and update your site whenever you have new information for your employees.

Frequently Asked Questions

Customizing Your Site

Q: Can I customize section headings?

A: No, but you can customize content in any area of a page that has a **Configure** icon ( ) displayed. To view **Configure** icons, click to select the **Edit page content** check box in the header at the top left of the site.

Q: What can I do if I do not want to display any content under a heading?

A: You can "white out" an area under a heading if you do not want to display content in it. Type text in the content area, highlight it, and then make it white. Choose to make the content visible, and then save your changes.

Q: Where can I get images for my site?

A: Many sites, such as Microsoft, offer free images. To get free images, go to **www.office.microsoft.com/clipart**. You can also go to **www.microsoft.com** and type **clip art** in the search field.

Q: In what formats can I provide files?

A: You can use many formats, such as DOC, DOCX, PDF, GIF, JPEG, JPG, PNG, and TIFF. Refer to the *ADP Workforce Now™ Portal Administrator Guide* for a complete list of acceptable file formats.

Q: Why am I having trouble uploading a file?

A: If you are having trouble uploading a file, try the following:

- Reduce your file size. The maximum size you can use for each file is 5 megabytes.
- Check your file type. Refer to the *ADP Workforce Now™ Portal Administrator Guide* for a complete list of acceptable file formats.

Q: Why is my logo not displaying properly after I upload it?

A: Your logo cannot be larger than 150 width x 45 height pixels prior to upload. If you go beyond this size, the logo will be cropped to fit after you upload it, so the full logo will not be displayed.

Using Your Site

Q: Can I create links to non-ADP products?

A: Yes, you can create links to non-ADP products.

Running a Registration Status Report

Q: How do I run a report to see which employees have registered for ADP Workforce Now?

A: You can run a registration status report in ADP Netsecure. Point to **Security Access** and select **Netsecure User Administration**. Click **Reports** to open the reporting menu.

Distributing Company Policies

Q: How can I distribute a company policy to employees in ADP Workforce Now?

A: When a company policy is ready to be distributed, you work with your HR practitioner to determine which employees should receive it, when they should receive it, and whether or not they need to acknowledge it. Distributing a company policy to employees involves two steps: (1) setting up the company policy and (2) setting up an event to roll out the policy to employees. You and the practitioner can set up the company policy. Only you can set up the event.

You can notify employees about the new policy by setting up a message that they will see when they log on to ADP Workforce Now. You can also send them an e-mail.

Detailed instructions on managing company policies are provided in the *ADP Workforce Now™ Portal Administrator Guide*.

Installing Adobe Reader

Q: How can my employees install a free version of the latest Adobe® Reader® ?

A: Your employees can go to the Adobe Web site at **www.adobe.com** and then follow the instructions for downloading a free, current version of Adobe Reader.