ADP Workforce Now®
Portal Administrator Guide

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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.

As a portal administrator, you set up the site and manage what employees can see and do. The many tasks you perform include customizing your site theme, creating approval and notification processes, and managing security groups.

About This Guide

Getting Started with ADP Workforce Now®: Quick Reference helped you log on to ADP Workforce Now and get familiar with the tasks you need to perform to get your site up and running for your employees. This guide, the *ADP Workforce Now® Portal Administrator Guide,* provides step-by-step instructions for completing these tasks and maintaining your site going forward.

Types of Users

ADP Workforce Now has four types of users:

- **Employee** – views and updates personal information
- **Manager** – supervises employee tasks and manages work events
- **Practitioner** – adds and modifies content related to HR and benefits, payroll, and time and attendance data
- **Portal Administrator** – controls user privileges and the appearance of the ADP Workforce Now Web site

The tasks users can perform and the pages available to them depend on the ADP modules purchased and the business decisions of the company.

Security Groups

Security groups determine what users can see and do on the site. You have the important task of assigning your employees to the appropriate security groups. When setting up security groups, carefully consider the employees' job functions and what information the employees will need access to.

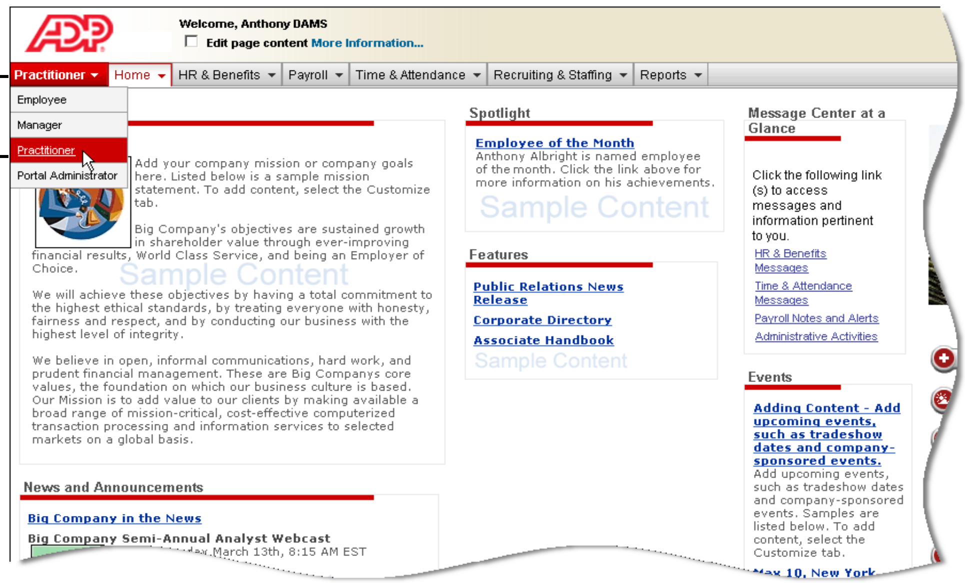
For more information about security, refer to the *ADP Workforce Now® Security Guide.* This guide contains detailed information about assigning employees to security groups, creating custom security groups, setting user permissions (access to specific features in ADP Workforce Now), and defining membership rules.

Navigating the Site

ADP Workforce Now has a customized view based on the company's setup and the role of the user (employee, manager, practitioner, or portal administrator). For example, the menus and menu items that the employee sees are different than those of the portal administrator. To perform portal administrator tasks, make sure the role displayed in the Role Selector is Portal Administrator.

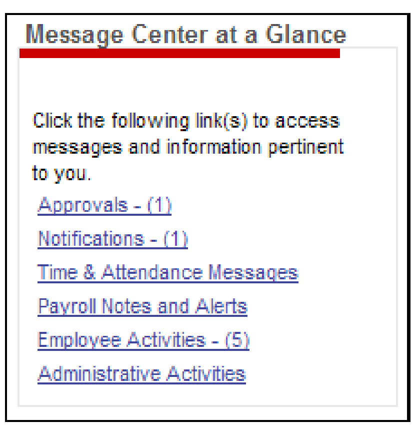
Role Selector

Menu item



Message Center at a Glance

You can quickly view the approvals, notifications, and activities that have been sent to you in the **Message Center at a Glance** area of the Welcome page. The links for approvals, notifications, and activities in this area take you directly to the corresponding area of the Message Center page.



On the Message Center page, you can view the following:

- **Approvals** – outstanding tasks sent to managers and practitioners for approval
- **Notifications** – rejections for employees and notifications for managers and practitioners
- **Employee Activities** – new hire, data verification, and company policy events that need to be completed by employees
- **Administrative Activities** – administrative tasks related to new hires

Note: Employee activities are available only if Event Configuration has been set up for your company. Whether you can view approvals and notifications depends on your role and security access settings. Administrative activities are available only if new-hire activities are available for you to complete.

Where to Find Training and Help

You can access portal administrator training by clicking the **Support Center** link in the header at the top right of the site. Clicking this link takes you to the ADP Support Center. In the ADP Support Center, you can find additional information and guides, training materials, and other support information.

For help with a specific task, click ? (**Help**) on individual pages.

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 can 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.

Importance of Logging Off

It is important that you log off ADP Workforce Now to ensure that no one else can access your site and view your personal information.

1. In the header at the top right of the site, click **Log Off**.
2. Click **OK** to confirm your action.
3. Close your browser window.

Chapter 1

Customizing Your Site

As a portal administrator, you can make simple changes that transform ADP Workforce Now® into your company's own web site. You can add important company content in the form of text, images, and links. You can further customize the site by updating your logo, and changing fonts and colors to reflect your company's branding.

This chapter includes the following:

- **Customizing the Welcome and Resources Pages -** shows you how to add text, images, and links to the Welcome and Resources pages, where employees look for important information such as your company's mission statement and company policies.
- **Customizing Your Site Theme -** shows you how to customize the site header, Role Selector, and certain sections of pages (portlets). It also includes how to upload your company's logo.

Note: The menus and menu options that you see are based on your role and on the modules or services your company is using.

Customizing the Welcome and Resources Pages

The Welcome and Resources pages are great places to share important information about your company. The Welcome page is typically the default landing page that displays after you log on to ADP Workforce Now or switch roles. For this reason, it is an excellent page for sharing your company's mission statement, important messages, and news. You can also navigate to the Welcome page by selecting **Welcome** on the **Home** menu.

Note: If permission for the Welcome page has been removed from your security group or groups, you will see the first page of the first menu that is displayed. Information on setting permissions for security groups is provided in the *ADP Workforce Now® Security Guide*.

The Resources page is also available on the **Home** menu and may contain content such as company policies, forms, quick links, or other online tools that are helpful to employees.

The content you add on the Welcome and Resources pages is the same for all roles unless you assign that content to specific security groups.

Reviewing Sample Content

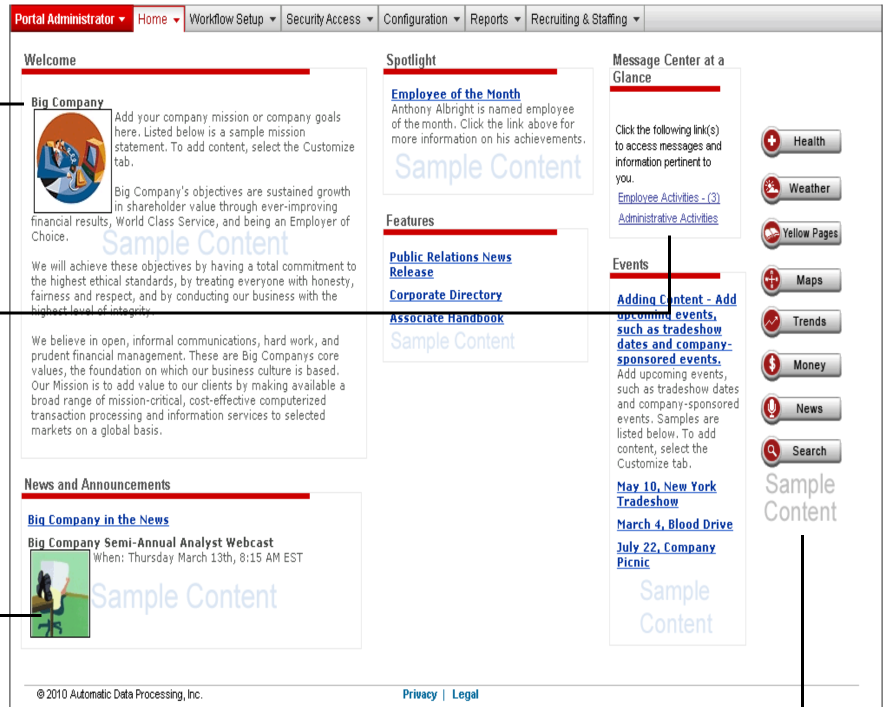
ADP Workforce Now comes with sample content on the Welcome and Resources pages to give you ideas about what you might want to include on your site. Review sample content and decide what information your company wants to display, and which roles will be assigned to see specific content. How much content you can add to a page depends on the section you choose.

Important: When you customize the pages with your own information, the sample content disappears.

Welcome Page

You can add a welcome message or your company's mission statement here, along with a graphic if desired.

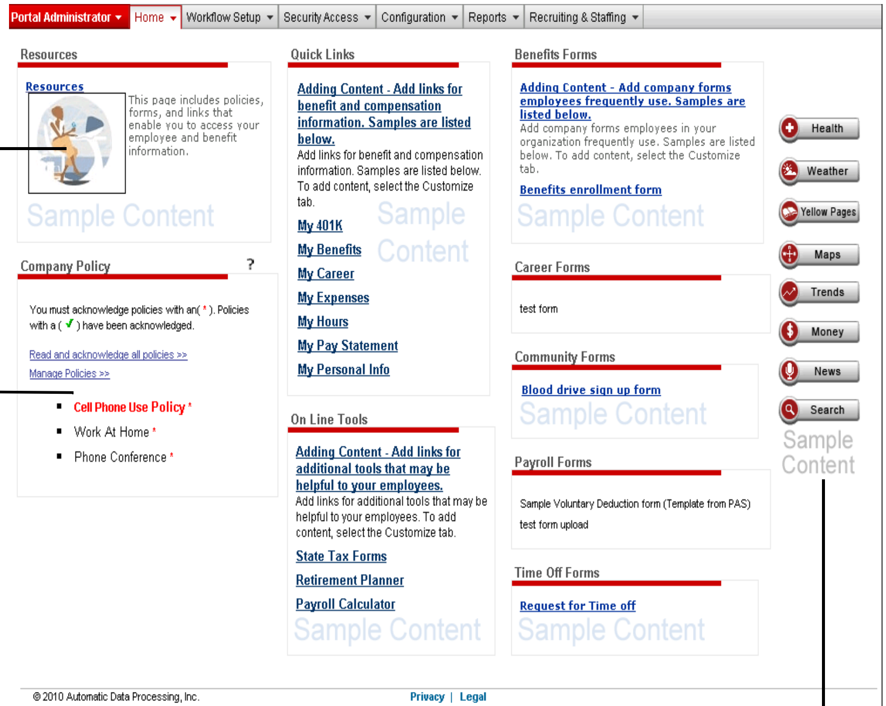
You can change the introduction to user messages here. However, you cannot change the links that display in this area because they are automatically created. The links each user sees are based on the services the company is using, the user's role in the company, and the assigned approvals, notifications, or activities that have been sent to the user.



You can add important company news and announcements in this area.

You can add visual links, or banners, to common web sites that employees visit. You can also add these banners on the Resources page. **Note:** You cannot change banners that are provided by ADP, but you can choose to show them or not. These banners display above the ones you add.

Resources Page



You can customize the introduction to your Resources page here and add a graphic if desired.

You can change the introduction to company policies and the link text here. **Note:** To upload company policies, click the **Manage Policies** link.

You can add quick links to pages where employees frequently go to complete personal tasks. You can direct employees to an external web page. You can also direct employees to another page in ADP Workforce Now by adding a "smart" link. (Refer to "Appendix: Adding Smart Links to ADP Workforce Now Pages" on page 145.)

Note: You can add your company logo by customizing your theme. Refer to "Creating a Custom Theme" on page 19.

Adding Content Items

The content items you can add include text, images, and links to documents or other web sites. How much content you can add to a page depends on the section you choose. You can also make content items visible or not, assign security groups for each content item, and change the order of the content items as they would appear on the page.

To add a content item, do the following:

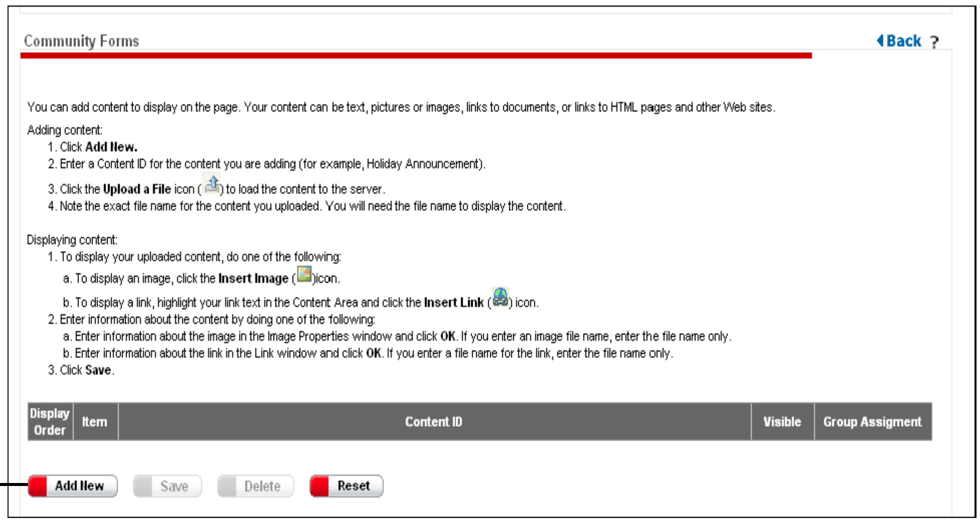
1. Point to **Home** and select **Welcome** or **Resources**.
2. Click to select the **Edit page content** check box in the banner at the top left of the site. **Configure** (pencil) icons display to indicate the sections you can customize.
3. If you are adding new content, click (**Configure**) in the section of the page where you want to add content. The Content Summary page displays.

Note: You can customize any section where a **Configure** icon is displayed, but you can have only one Content Summary page open at a time. If you click another **Configure** icon while a Content Summary page is open, a message displays indicating that you need to complete your updates and close the current page first.

4 On the Content Summary page, click **Add New**. The new content item displays.

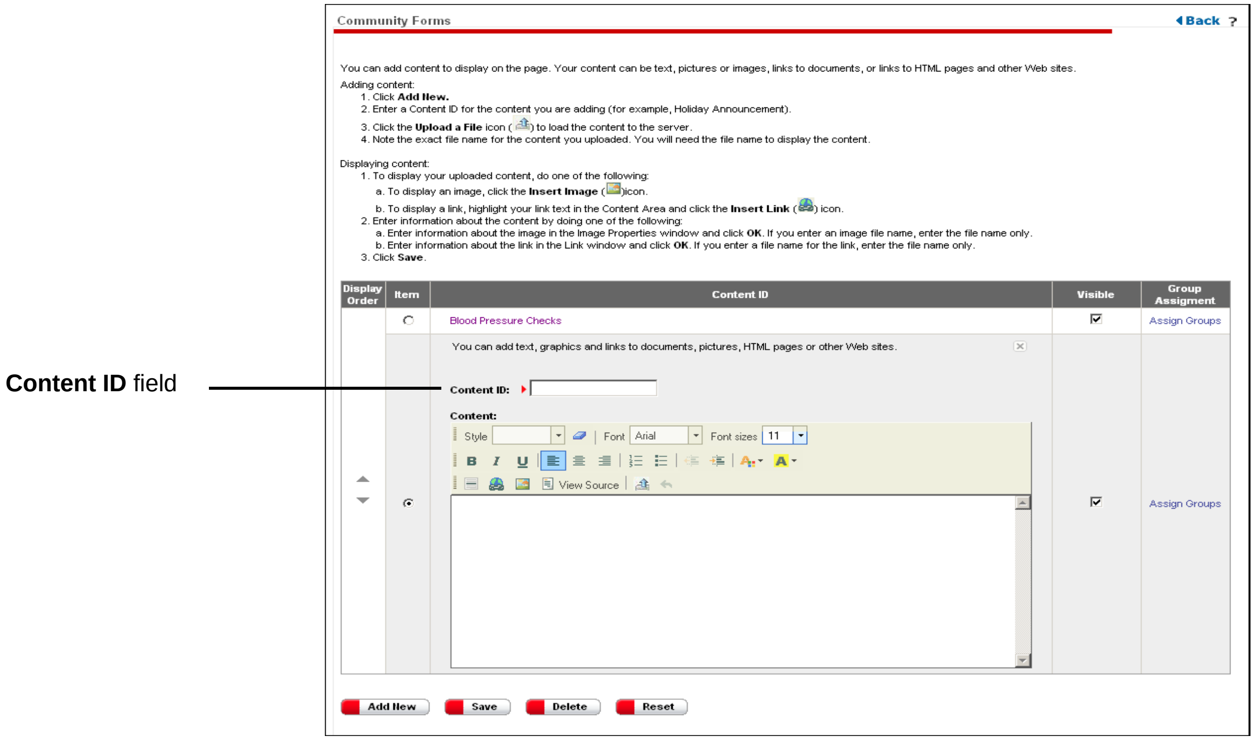
Note: It is possible to have more than one content item open at the same time while making your changes on a Content Summary page.

The Content Summary page is a list of content items for the section.



Add New button

5 Enter an identifier in the **Content ID** field. This is a short description of your content item and does not display on the site. The content ID can include alphanumeric characters, dashes, and underscores. The maximum character length is 100.



6 Type (or copy and paste from a file) your text in the content area. To format the content text, highlight the text, and then use the toolbar icons to change the appearance of the text. To remove styles and formatting, highlight the text and click the **Remove Styles and Formatting** icon.

- The maximum character length for content text is 100,000. This includes any styles or formatting that you apply to the text. You must enter at least 1 character.
- If you are uploading a banner, the maximum size of the banner that you can provide is 5 megabytes. Banners are resized at 110 pixels by 110 pixels after you upload them, which may change their appearance.

Note: Text pasted into the field from another source will not necessarily reflect the point size of the original text because the point size in the content editor is based on HTML attributes that approximate the point sizes.

Tip: If at this point you do not have content ready to display on the page, but you prefer that the sample content not be displayed, do the following:
- Type text in the content area.
- Highlight the text and make the text white.
- In the **Visible** column, click to select the content item’s check box.
- Click **Save** and then click **Back** to return to the section of the page where your changes are displayed.

Back button

Follow steps to insert images and links. See step 8 for more information.

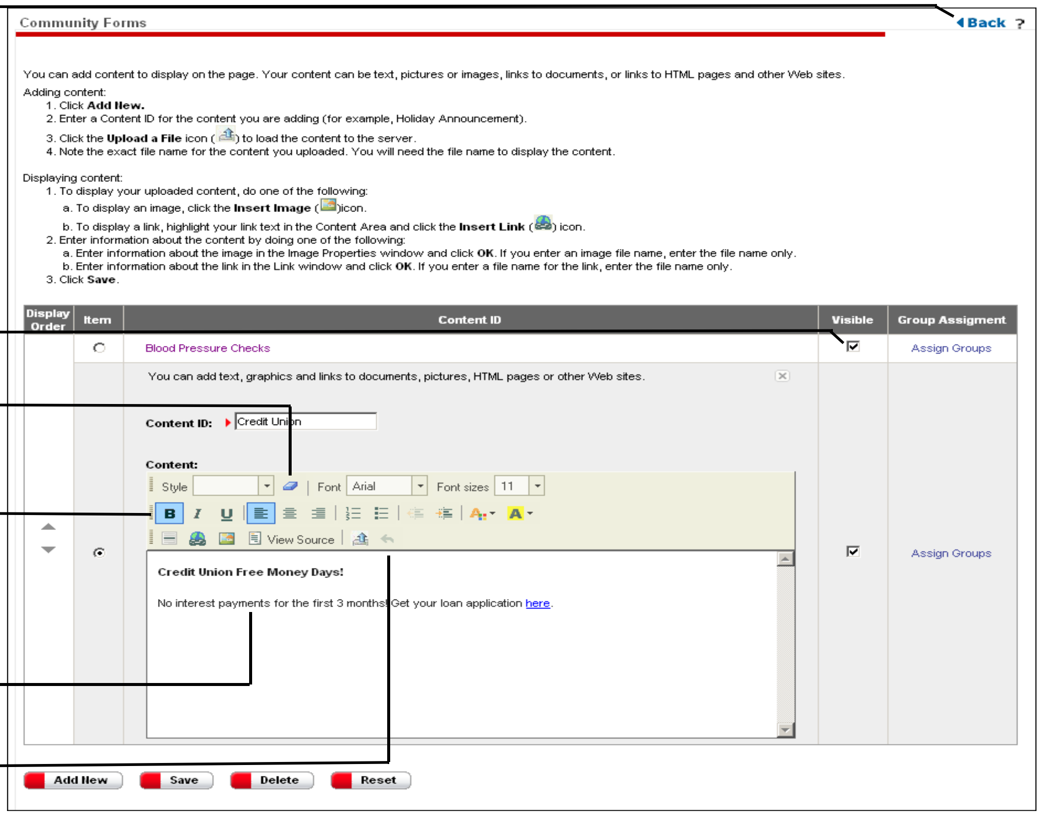
Make items visible on the page.

Use to remove styles and formats.

Click here to change the heading text style to bold. **Tip**: Place your cursor over the icons to see what actions they perform.

Add new content.

Use to undo your most recent changes.



7 If you want to save or delete your content item at this point, see “Saving or Deleting Content Items” on page 10 for more information.

8 You can also add files, images, and web links to your content items. Select the following links for more information:

- “Adding a Client-Specific File” on page 11
- “Adding an Image Stored on Your Local Drive” on page 12
- “Adding an Image File Located on a Web Site” on page 13
- “Adding Web Links” on page 13
- “Adding a Link to an Image” on page 13

The following are the acceptable file extensions:

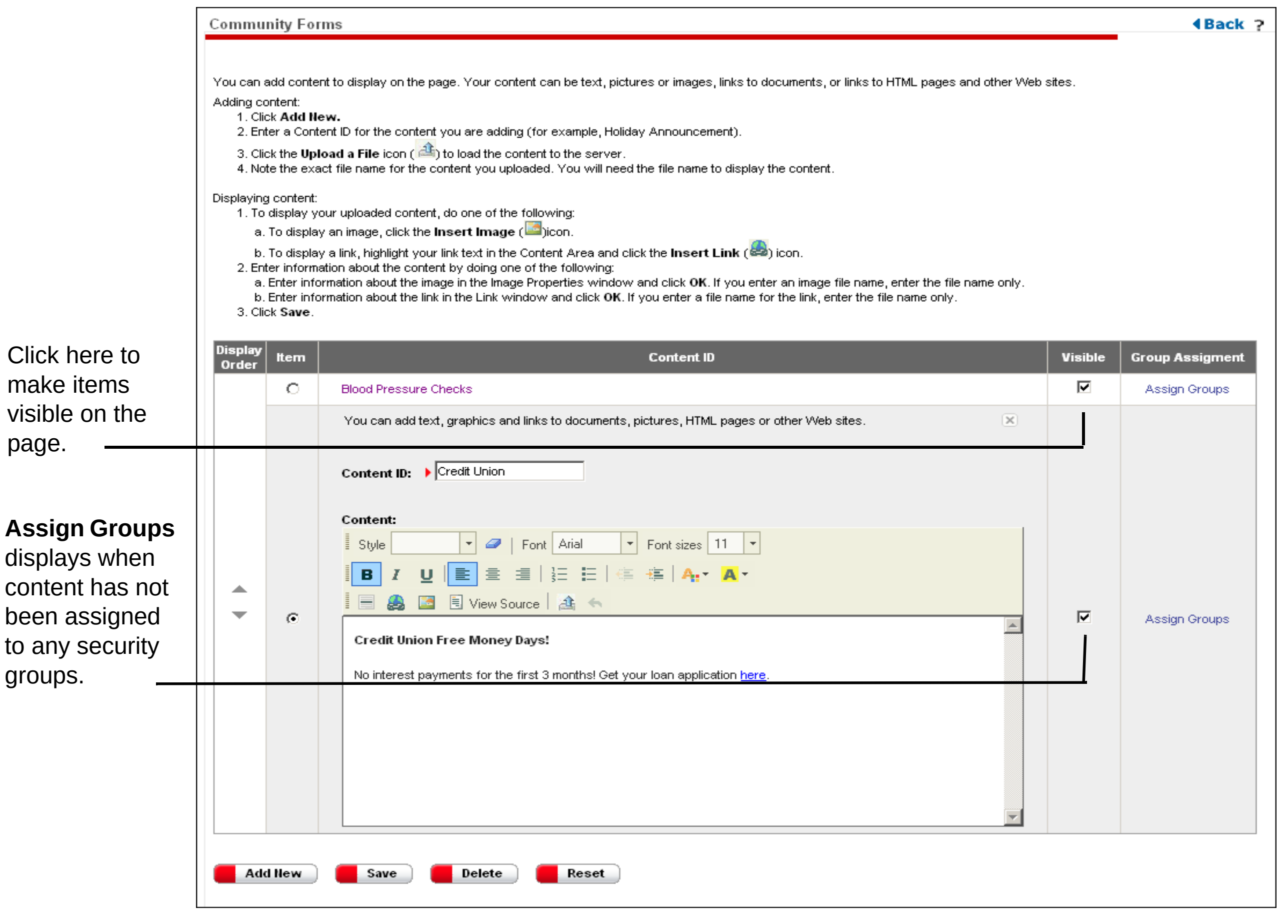
bmp	gif	pdf	tiff	docx
csv	jpeg	png	txt	ppsx
doc	jpg	pps	xls	xlsx
dot	mdb	ppt	xlt	pptx
	mht	rtf		

Note: Each file you upload can be up to 5 megabytes in size. The maximum size available to you for all added content is 250 megabytes.

You can add also add links, or jumps, from one page directly to another page. This allows you to add a "smart" link that the user can click to immediately access another page. For more information, see "Appendix: Adding Smart Links to ADP Workforce Now Pages" on page 145.

9 To make the content visible on the page, in the **Visible** column, click to select the item's check box.

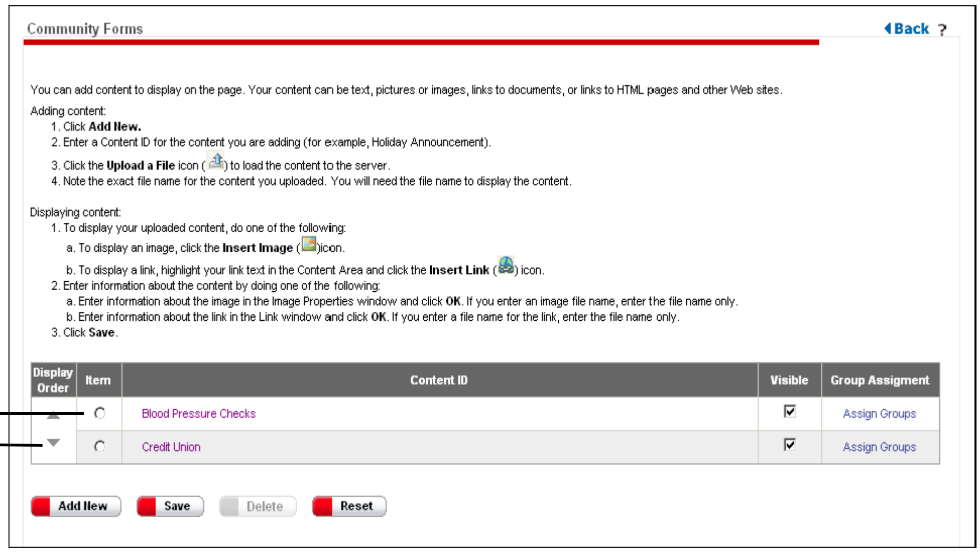
10 To assign your content to a security group, click **Assign Groups**. Then, in the **Available Groups** area of the page, click to select the security group(s) to which you want to assign your content, and then click **>** to move the security group(s) to the **Selected Groups** area. When you are finished, click **Done**.



Note: Content that you do not assign to specific security groups becomes visible to all users. **Assign Groups** displays when content has not been assigned to any security groups. **Show Groups** displays when content has been assigned to one or more security groups (and saved). For more information about setting up security groups, refer to the *ADP Workforce Now® Security Guide.*

11 To change the order of the content item as it appears on the page, click the item's **Item** button. Next, in the **Display Order** column, click the up and down arrows to move the item up or down in the Content ID list.

Tip: Changing order of the content items can be done on the Content Summary page or when the content items are being edited.



Click **Item** for the item you want to move.

Use these arrows to change the display order of your content item.

Note: Sometimes you will see a **Third Party Vendor** link ( ) in the list. This link was set up by an ADP Administrator and you cannot customize it. You can assign security groups to the link and change the order in which it appears on the page.

12 When you are finished making all of your changes, scroll down the page and click **Save**, and then click **Back**. This returns you to the section of the page where your changes are displayed.

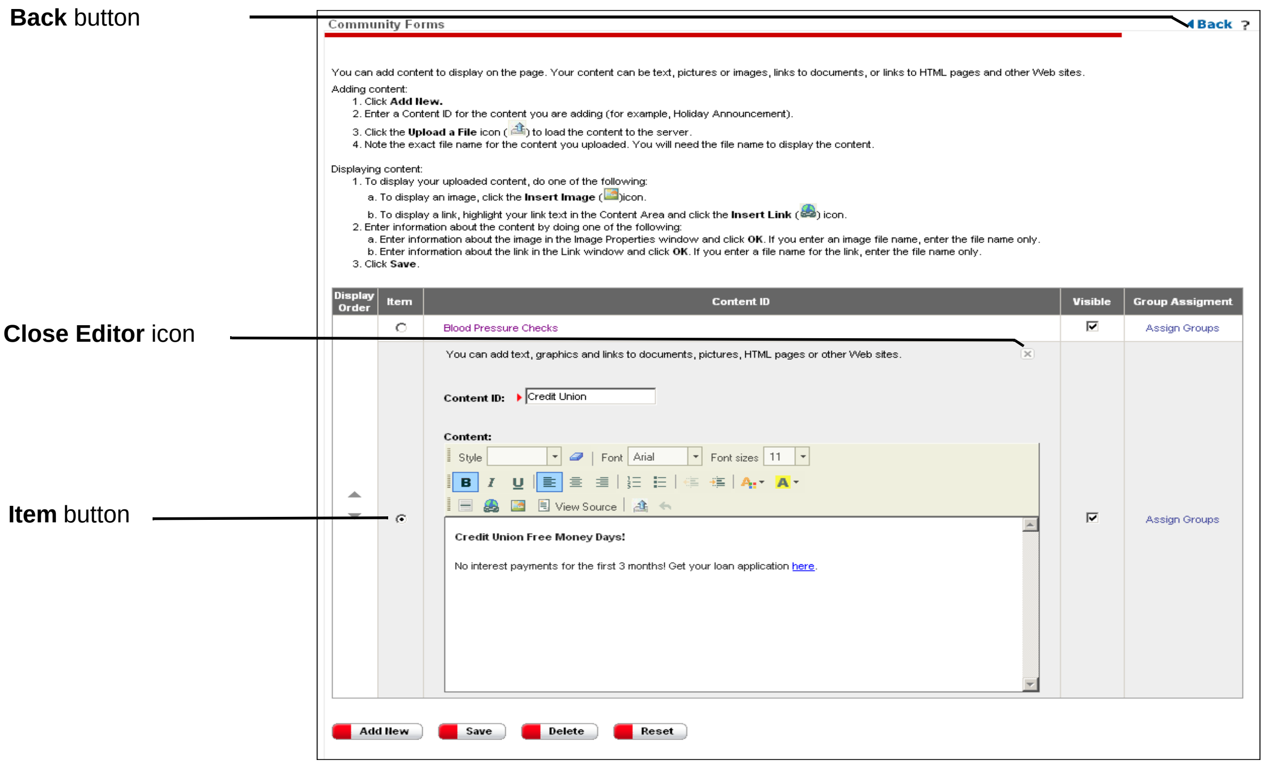
Note: When you replace a file, you must clear your cache to correctly display your content. How you clear your cache depends on the browser you are using. For Internet Explorer, select **Internet Options** or **Delete Browsing History...** from the **Tools** menu. Delete **Temporary Internet Files** or select **Clear History**. For Mozilla Firefox, select **Clear Recent History...** from the **Tools** menu. Select **Everything** in the **Time range to clear** drop-down list. Click the **Details** down arrow and select **Cache**. Click **Clear Now**.

In this example, we have replaced sample content with a description and a web site link.

Saving or Deleting Content Items

The following are options for saving or deleting content items.

If You Want To	Then
Permanently save changes to content items	Click **Save.** **Note:** The content items you are working on remain open until you click **Back**, which closes the content items.
Delete a content item	Click the content item's **Item** button and then click **Delete**. Click **OK** to confirm your action. Click **Save**.
Delete a new content item before adding content or a content ID (for example, if you opened a new content item by mistake)	Click **Delete, and then c**lick **OK** to confirm your action. Click **Save**. **Note:** The **Item** button is automatically selected for new content items.
Restore the sample content to a content item	Click the item's **Item** button, and then click **Delete**. Click **OK** to confirm your action. Click **Save**.
Remove all unsaved changes for all content items	Click **Reset**.



Adding Files, Images, and Web Links

You can add files, images, and web links to your content items after you have entered a content ID. Select the following links for more information:

- “Adding a Client-Specific File” on page 11
- “Adding an Image Stored on Your Local Drive” on page 12
- “Adding an Image File Located on a Web Site” on page 13
- “Adding Web Links” on page 13
- “Adding a Link to an Image” on page 13

Adding a Client-Specific File

Important: This file must first be uploaded to the server. Filenames are case-sensitive and cannot contain special characters or spaces. Keep a record of your filename because you will need to enter it exactly as you uploaded it in step 9 of this task.

1. Click (**Upload a File**). The Upload File window displays.
2. Click **Browse** to navigate to where the file is located on your local disk.
3. Click **Upload** to upload the client-specific file. A message displays when the file has successfully uploaded.
4. Click (**Close**).
5. Enter text you want to use for the link in the content area and format the text as needed (for example, font and color).

6 Highlight the text and click (**Insert Link**). The Link window displays.

7 From the **Link Type** list, select **URL**.

8 In the **Protocol** field, select **Uploaded File**.

9 In the **Content filename or URL** field, enter the name of the file (for example, MissonStatement.pdf). The filename must be entered exactly as it was uploaded.

10 Click **OK**. The selected text is underlined.

11 When you have completed your changes, click **Save** to save your changes.

Adding an Image Stored on Your Local Drive

Important: This file must first be uploaded to the server. Filenames are case-sensitive and cannot contain special characters or spaces. Keep a record of your filename because you will need to enter it exactly as you uploaded it in step 6 of this task.

1 Click (**Upload a File**). The Upload File window displays.

2 Click **Browse** to navigate to where the file is located on your local disk.

3 Click **Upload** to upload the image file. A message displays when the file has successfully uploaded.

4 Click (**Close**).

5 Click (**Insert Image**). The Image Properties window displays.

6 In the **Image filename or URL** field, enter the uploaded image filename. The filename must be entered exactly as it was uploaded.

7 In the **Image fly-over text** field, enter text, if desired. The text will display when a user hovers the cursor over the image.

8 Use these optional settings, if desired:

- In the **Width and Height** fields, adjust the pixel values for the width and height for the image.
- In the **Border** field, enter a pixel value for the image thickness.
- In the **HSpace and VSpace** fields, enter pixel values for the horizontal and vertical spacing for the image. This provides more exact placement of the image in the content area.
- In the **Align** field, choose left or right.

9 Click **OK**. The image is added to the content area.

Note: The image displays on the page as a small graphic box. Once you save your changes, the image will display correctly on the page to which it was added. The fly-over text displays on the page when a user hovers the cursor over the image.

10 When you have completed your changes, click **Save**.

Adding an Image File Located on a Web Site

1. Click (**Insert Image**). The Image Properties window displays.
2. In the **Image filename or URL** field, enter the URL location and name of the file in http://web address/filename.ext format, where filename.ext is the name of your image file (for example, http://www.emoticons4u.com/happy/028.gif).

   Important: Be sure to enter the URL correctly, and to end with the exact filename and extension for the image you wish to add.

3. In the **Image fly-over text** field, enter text, if desired. The text will display when a user hovers the cursor over the image.
4. Use these optional settings, if desired:
   - In the **Width and Height** fields, adjust the pixel values for the width and height for the image.
   - In the **Border** field, enter a pixel value for the image thickness.
   - In the **HSpace and VSpace** fields, enter pixel values for the horizontal and vertical spacing for the image. This provides more exact placement of the image in the content area.
   - In the **Align** field, choose left or right.
5. Click **OK**. The image is added to the content area.

   Note: The image displays on the page as a small graphic box. Once you save your changes, the image will display correctly on the page to which it was added. The fly-over text displays on the page when a user hovers the cursor over the image.

6. When you have completed your changes, click **Save**.

Adding Web Links

1. In the content area, enter the text you want to use for the link and format the text as needed.
2. Highlight the text and click (**Insert Link**). The Link window displays.
3. In the **Link Type** field, select **URL**.
4. In the **Protocol** field, choose the protocol you want (for example, http, https, ftp).
5. In the **Content filename or URL** field, enter the URL of the web site.
6. Click **OK**. The selected text is underlined.
7. When you have completed your changes, click **Save** to save your changes.

Adding a Link to an Image

1. First, the image must be uploaded to your local drive. See “Adding an Image Stored on Your Local Drive” on page 12.
2. Click (**Insert Image**). The Image Properties window displays.
3. In the **Image filename or URL** field, enter the uploaded image filename. The filename must be entered exactly as it was uploaded.

4 In the **Image fly-over text** field, enter text, if desired. The text will display when a user hovers the cursor over the image.

5 Use these optional settings, if desired:

- In the **Width and Height** fields, adjust the pixel values for the width and height for the image.
- In the **Border** field, enter a pixel value for the image thickness.
- In the **HSpace and VSpace** fields, enter pixel values for the horizontal and vertical spacing for the image. This provides more exact placement of the image in the content area.
- In the **Align** field, choose left or right.

6 Click **OK**. The image is added to the content area.

Note: The image displays on the page as a small graphic box. Once you save your changes, the image will display correctly on the page to which it was added. The fly-over text displays on the page when a user hovers the cursor over the image.

7 Click the image and click  (**Insert Link**). The Link window displays.

8 In the **Link Type** field, select **URL**.

9 In the **Protocol** field, choose the protocol you want (for example, http, https, ftp).

10 In the **Content filename or URL** field, enter the URL.

11 Click **OK**.

12 When you have completed your changes, click **Save** to save your changes.

Adding Smart Links

With ADP Workforce Now, you can help employees move directly from one ADP Workforce Now page to another by adding “smart” links. Users click these smart links, or jumps, and immediately access the page defined in the link.

You can also add a smart link within an email to help the email recipient quickly access another ADP Workforce Now page.

Detailed instructions for adding smart links are provided in the guide’s appendix. (See “Appendix: Adding Smart Links to ADP Workforce Now Pages” on page 145.) The appendix provides tables that list the URL links available for the ADP Workforce Now pages. The tables are organized by role (employee, manager, practitioner, and portal administrator).

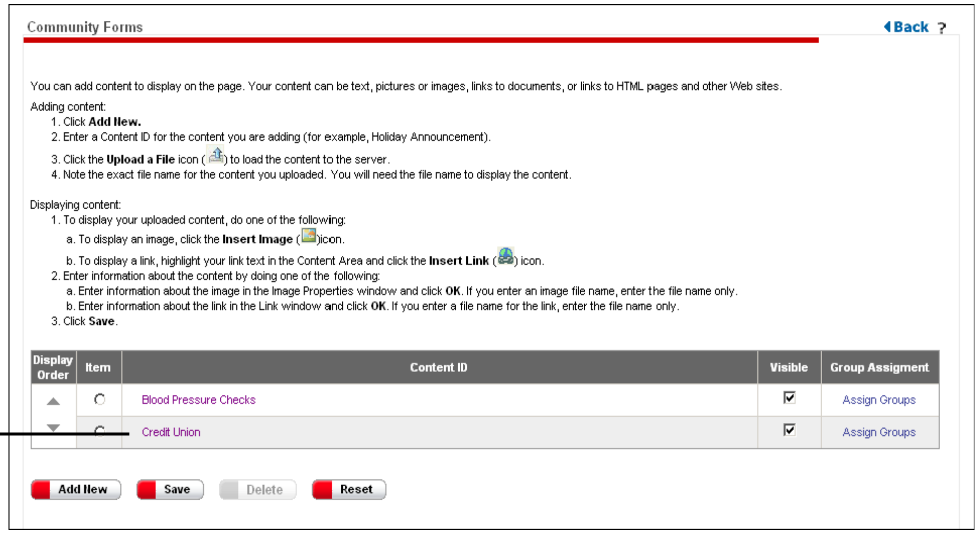
Updating Content

1 Point to **Home** and select **Welcome** or **Resources**.

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

3 Click (**Configure**) in the section of the page where you want to update content. The Content Summary page displays.

Click the item to open it.

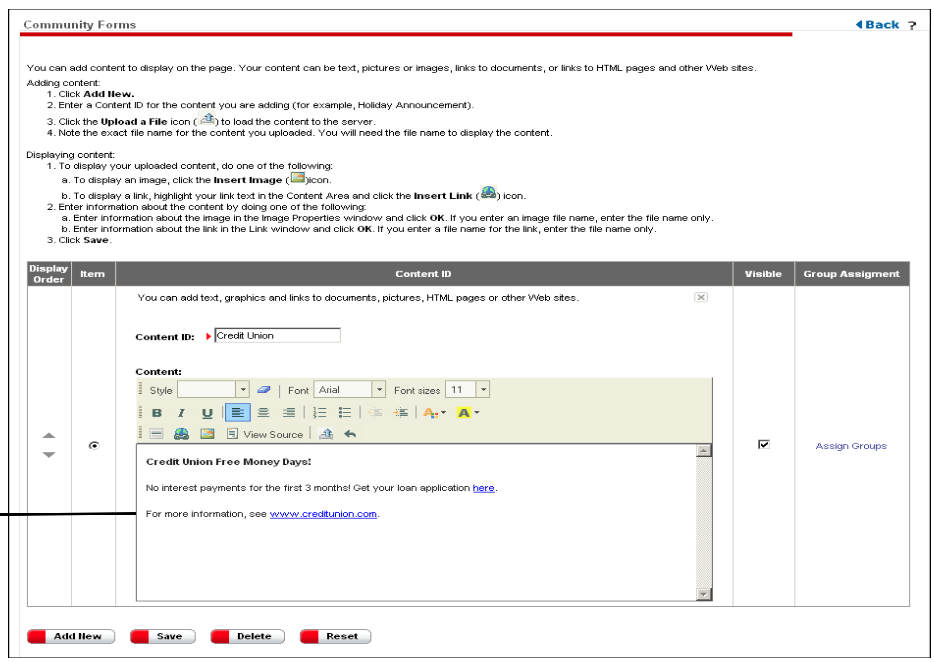


4 To open an item, click the content ID name.

Tip: You can open more than one content item at a time on a Content Summary page.

5 Update your content as necessary.

In this example, we have added another web site.



Note: You may need to upload a new file or update your link. See "Adding Content Items" on page 4 for more information.

6 When you are finished, click **Save** and then click **Back**. This returns you to the section of the page where your changes are displayed.

Hiding Portlets from View

To prevent certain users from seeing a portlet, you can deny them access by modifying the permissions for their security group. To access security groups, point to **Security Access** and select **Security Groups**.

Your *ADP Workforce Now® Security Guide* provides detailed instructions for setting up security groups and assigning appropriate permissions. To access this guide, open ADP Workforce Now, point to **Home**, and select **Administrator Resources**.

Customizable Portlets

In ADP Workforce Now, you can customize many of the portlets that are visible to your employees. Some portlets must be customized by your ADP Administrator.

You can make changes to the following portlets.

Page	Portlet
Welcome	• Company Mission Statement • News & Announcements • Spot Light • Features • Events • ADP Banner (Rotating) - Show/Hide only • Banners (Static) • Message Center at a Glance
Resources	• Resources • Quick Links • On Line Tools • Benefit Forms • Career Forms • Community Forms • Payroll Forms • Time Off Forms • ADP Banner (Rotating) - Show/Hide only • Banners (Static)
Pay & Taxes	**Welcome Page** • Tools & Links **Pay Card** • Tools & Links
Benefits	**Personal Accrued Time** • Tools & Links **Spending Accounts** • Tools & Links
Administrator Resources	• My ADP Banner (Rotating) - Show/Hide only

The following portlets can only be customized by your ADP Administrator:

Page	Portlet
Welcome	• ADP Banner (Rotating)
Resources	• ADP Banner (Rotating)
Administrator Resources	• Products • Introduction • Product Finder • Contact Me • Resources • References • My ADP Banner (Rotating) • ADP Banners (Static) • News & Information
My Tools - HR Services	• Link Central • Library & Forms • User Assistance • Training • Bulletin Board • Manager Toolbox
Administrator Tools - HR Services	• Link Central • Library & Forms • User Assistance • Training • Bulletin Board

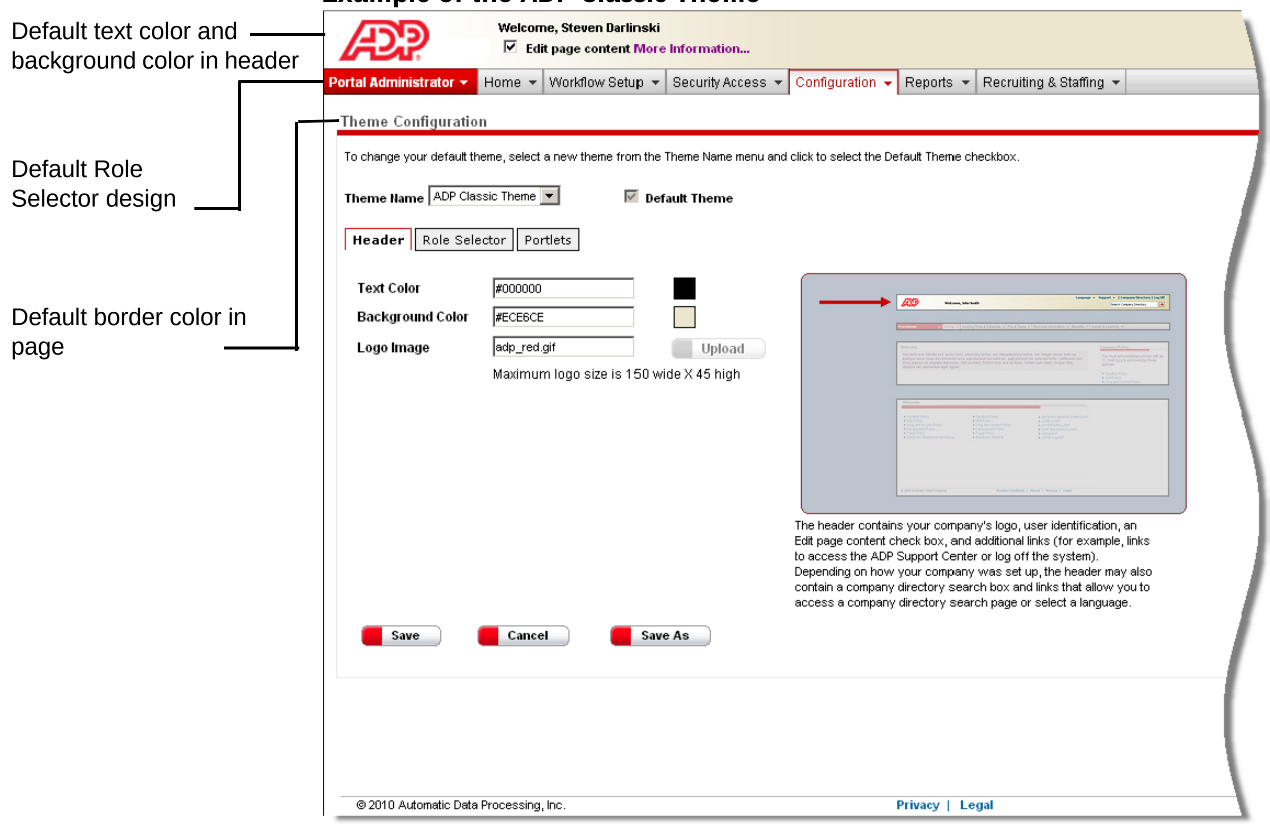
Customizing Your Site Theme

You can customize the look of your site by choosing a theme that suits the branding of your organization. You can choose one of the themes that ADP provides, or you can create a custom theme.

Note: Changes you make to your theme are applied to your site immediately.

ADP provides three standard themes: the ADP Classic Theme, the Blue Theme, and the Silver Theme. By default, the ADP Classic Theme is applied to your site.

Example of the ADP Classic Theme



Selecting a Standard Theme

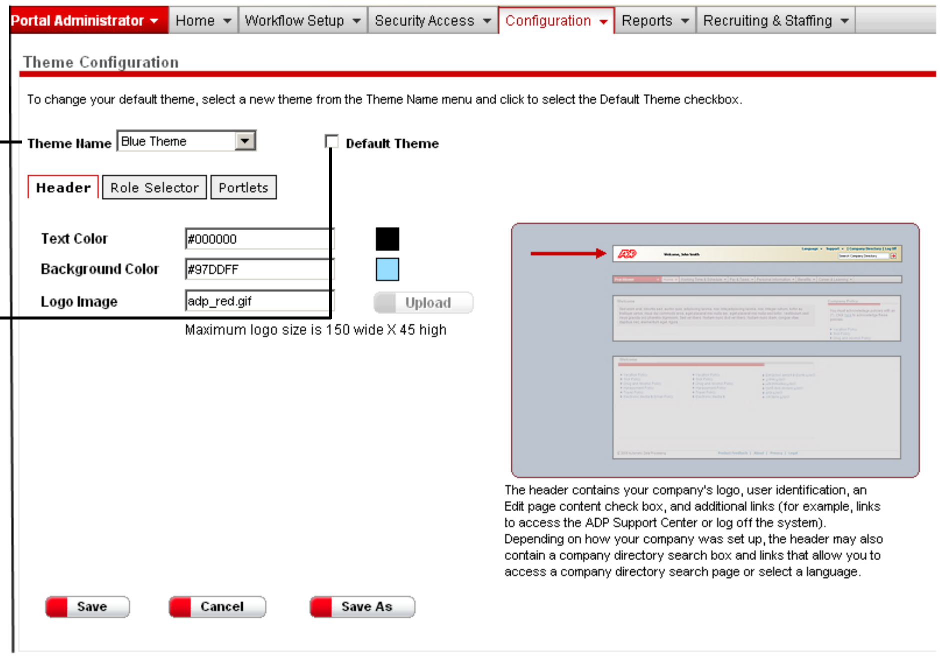
You can replace the ADP Classic Theme with either the Blue Theme or the Silver Theme.

1 Point to **Configuration** and select **Customize Theme**.

2 Do the following:

In the **Theme Name** field, select a theme in the list.

If you want this theme to be the default theme for your site, click to select the **Default Theme** check box.



3 Click **Save,** and then click **OK** to confirm your action.

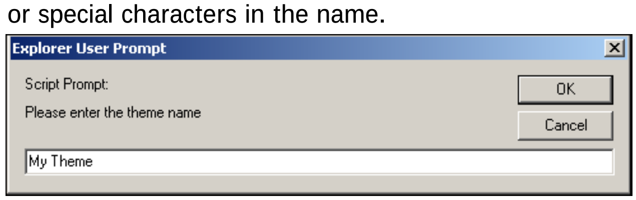
Creating a Custom Theme

If you wish to make any changes to a standard theme, including uploading a logo, you need to create a custom theme by saving a standard theme as a new name.

1 On the Theme Configuration page, in the **Theme Name** field, select the template closest to your needs.

2 Click **Save As**, and then click **OK** to confirm your action.

3 Enter a unique name for your new theme, and then click **OK.** Do not include numbers or special characters in the name.



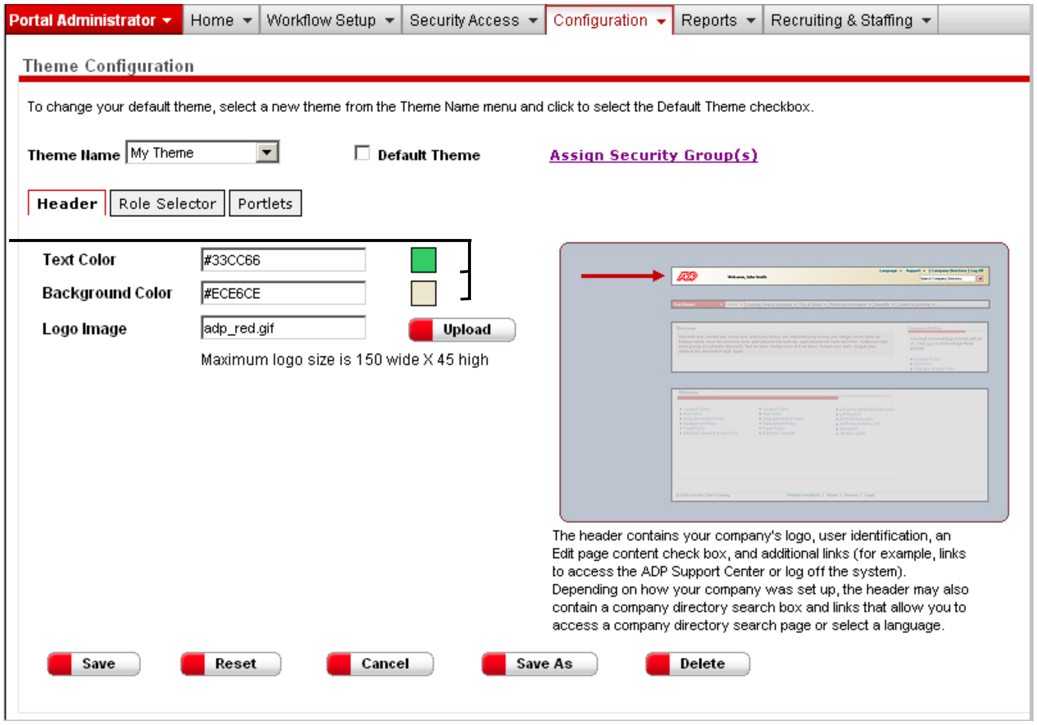
Result: Your new theme is now available in the list of items in the **Theme Name** field.

4 In the **Theme Name** field, select your theme in the list.

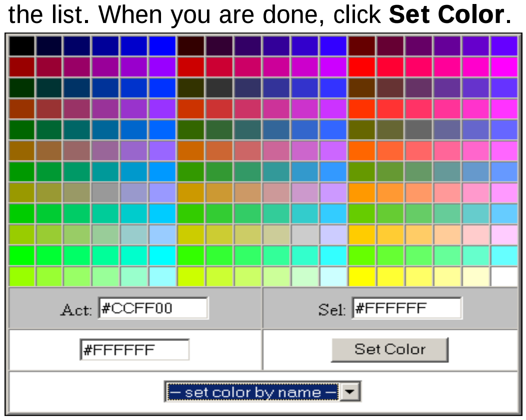
5 If you want this theme to be your default theme for your site, click to select the **Default Theme** check box.

6 To customize your header, select the **Header** tab. Choose a text color and background color by clicking the color box to the right of each field.

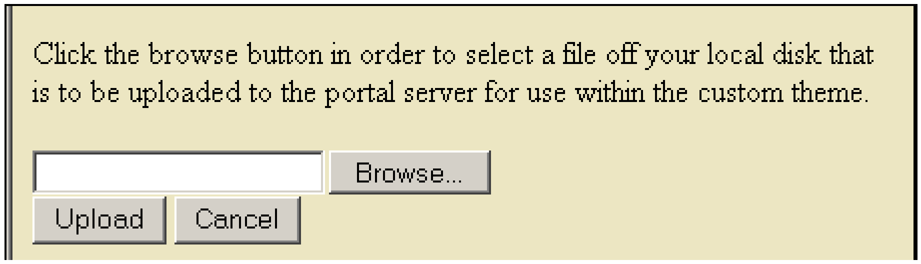
Text and background color boxes



7 Click the color you want, or in the **set color by name** field, select a color name in the list. When you are done, click **Set Color**.



8 To update your logo, on the **Header** tab, click **Upload**. Click **Browse** to find the logo, and then click **Upload**.

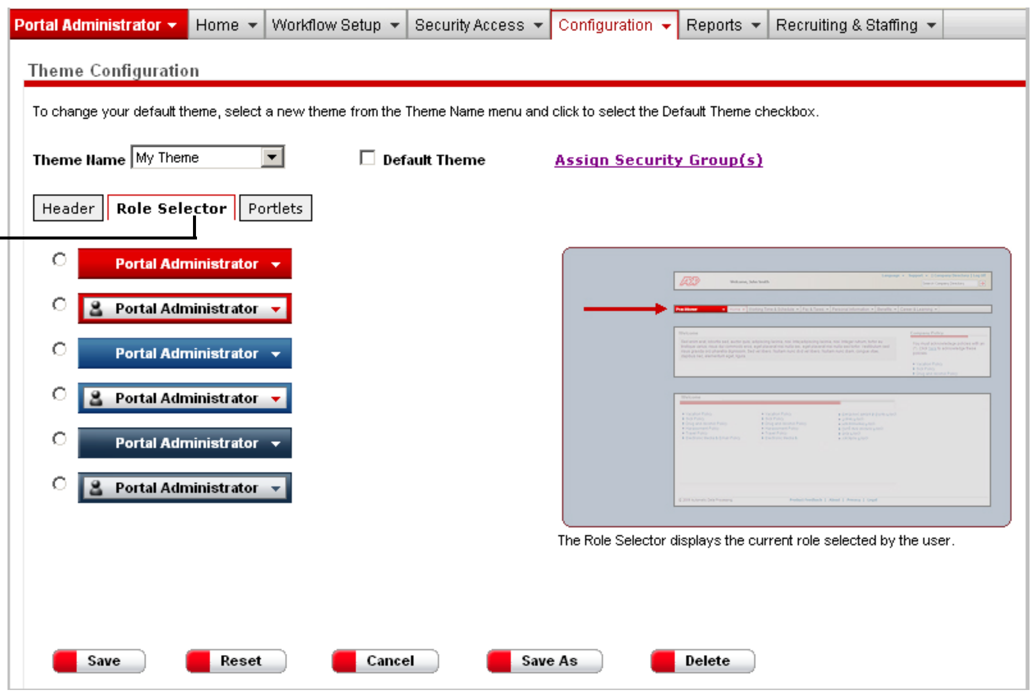


Important: Your logo cannot be larger than 150 width x 45 height pixels prior to upload. If you go beyond this size, the logo will be cropped to fit after you upload it, so the full logo will not be displayed. The logo will not be reduced or resized. You can use Microsoft® Picture Manager or Paint to resize your logo. Acceptable formats are BMP, JPG, JPEG, GIF, and PNG. No spaces or special characters should be included in the filename.

9 At the bottom of the page, click **Save**.

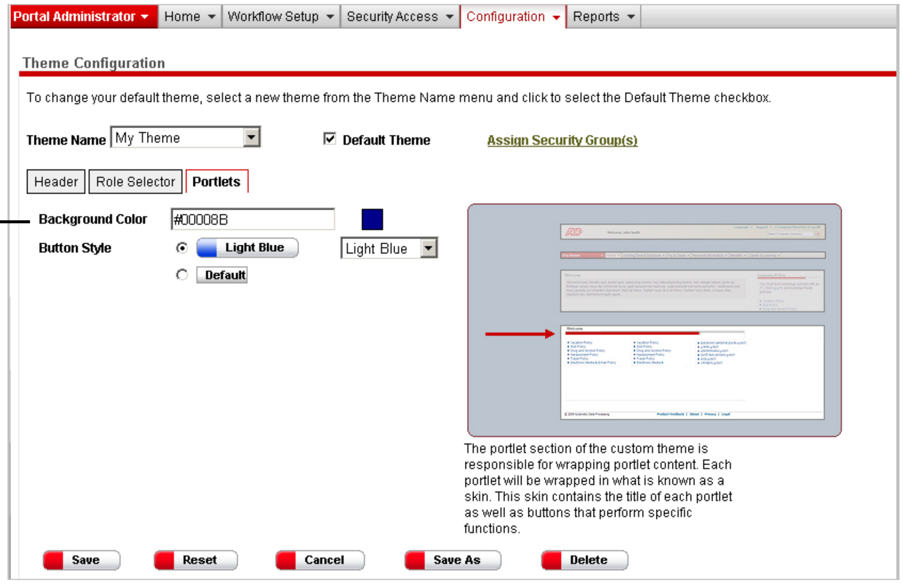
10 On the **Role Selector** tab, choose a color and style for the Role Selector.

Role Selector tab



11 On the **Portlets** tab, customize your page by choosing a bar color and button style.

Use the **Background Color** field to customize your bar color.



12 When you are done creating your custom theme, click **Save**, and then click **OK** to confirm your action.

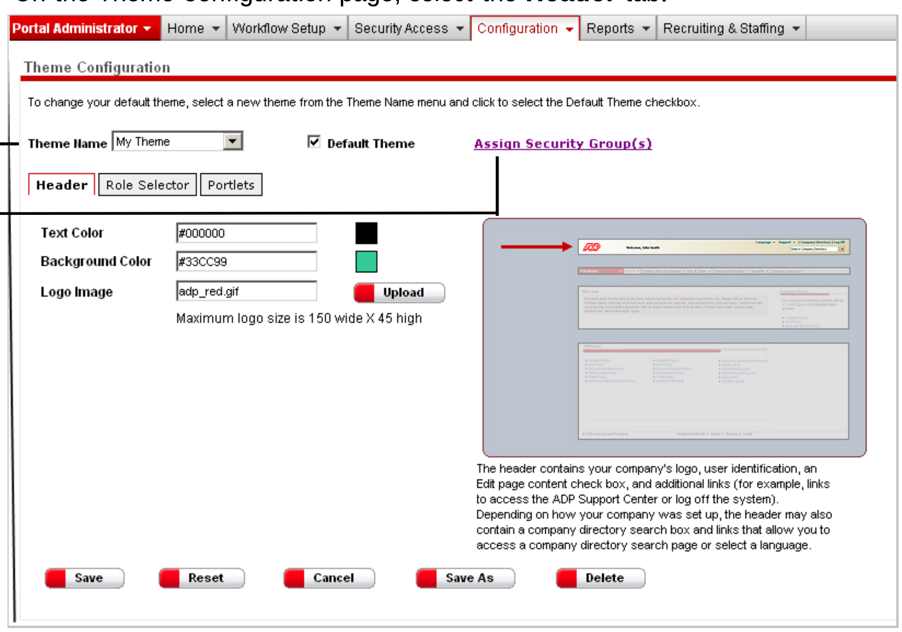
Assigning Custom Themes to Security Groups

You can only assign custom themes to specific security groups.

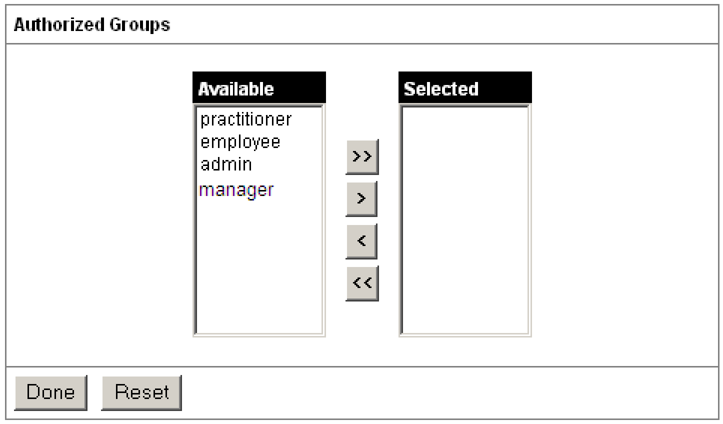
1 On the Theme Configuration page, select the **Header** tab.

Select the theme you want to assign.

Click **Assign Security Group(s)**.



2 Click to select the security group(s) to which you want to assign your custom theme, and then click **>** to move the group(s) into the **Selected** area.



3 When you are finished, click **Done**, and then click **Save**.

Important: Employees who belong to more than one security group with different assigned themes will be assigned the default theme. For more information about security groups, refer to your *ADP Workforce Now® Security Guide.*

Chapter 2

Managing Approvals and Notifications

A workflow is used to manage the approval and routing of events in ADP Workforce Now. For every workflow, the event needs to be sent to at least one person for approval or notification, and it must follow a route (workflow path). As the portal administrator, you work with your payroll and HR practitioners to determine and set up workflows for your organization. These workflows are initiated when users complete certain activities (events). For example, when an employee changes direct deposit information, a workflow may be initiated that routes the event to the payroll practitioner for approval.

Simple and Complex Workflows

A workflow can be simple or more complex. The type of workflow you set up depends on the event and your organizational processes. A simple workflow may only require approval or notification by a few people, whereas a more complex workflow may include multiple levels of approvals and calculations.

Each workflow can include the following:

- **Event** – the activity that requires approval or notification.
- **Work group** – one or more people to whom an event is routed for approval or notification.
- **Membership rules** – used to define criteria for group membership.
- **Workflow path** – the route that the workflow follows. A workflow path may have one or more steps, such as notification of a work group, approval of a manager, or routing to a manager's proxy. Workflow paths are assigned to workflows.
- **Proxy** – the person who approves an event in the absence of the designated approver.
- **Event-specific email notification** – an email for a specific event that is sent to users in a workflow path.
- **Business rules** – used to create exceptions to a workflow path. Business rules are assigned to workflows.

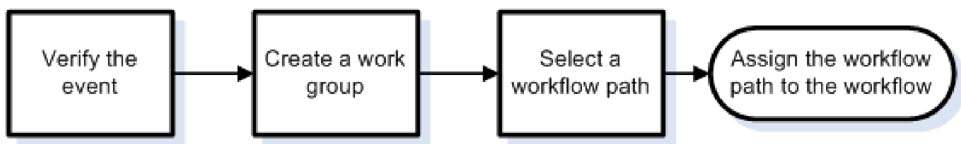
Note: Depending on how your company is set up, you may be using additional types of workflows. For more information on additional workflows, see the *HR & Benefits Implementation Guide* located on the Support Center.

Creating a Simple Workflow

You can use simple workflows for events that require only one level of approval. You can also use these workflows for events that have one standard workflow path, with no exceptions to this path.

Example of a Simple Workflow

An example of a simple workflow is a direct deposit update made by an employee. For this workflow, we could set up a workflow path that includes two payroll managers. This section outlines the tasks involved in creating a simple workflow, using the direct deposit event as a model.



Verifying the Event

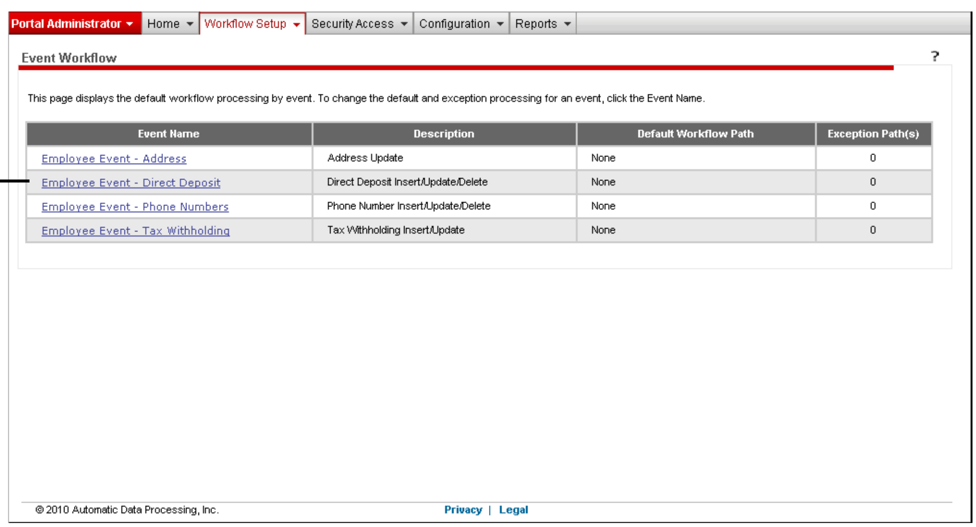
ADP provides a list of events for which you can set up workflows. You need to verify that the event for which you want to set up a workflow is included in that list.

1 Point to **Workflow Setup** and select **Event Workflow**.

2 In the **Event Name** column, view the listed events, and verify that the event you want to set up is displayed.

In our example, the event we need is **Employee Event - Direct Deposit**.

The options you see depend on the services your company is using.

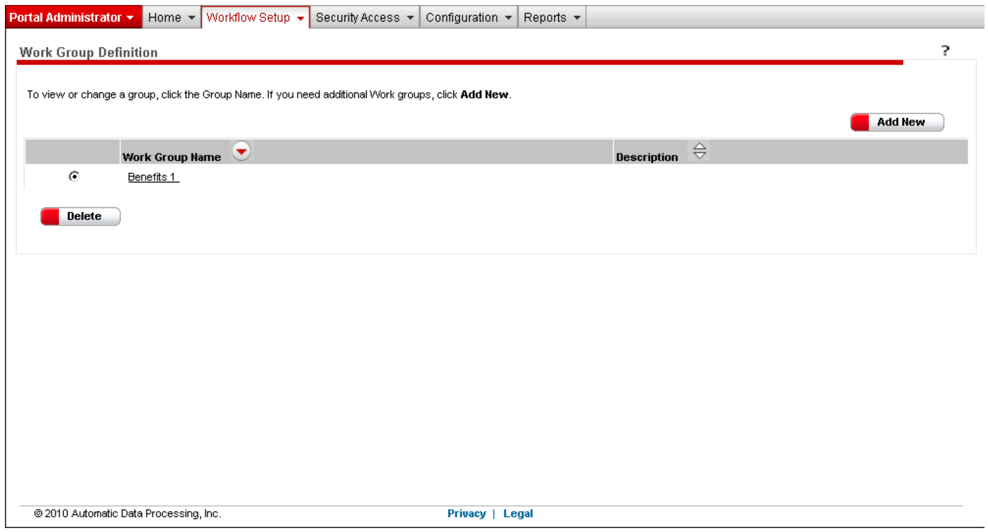


Creating a Work Group

A work group consists of the people to whom an event is routed for approval or notification. When you create a work group, you define the members who will be in it by either adding membership rules or adding members manually. The work group you create will approve or be notified of the event.

Note: Once you create a work group, you can use it in other workflows. For example, you may want the same HR team to be notified of several different manager events.

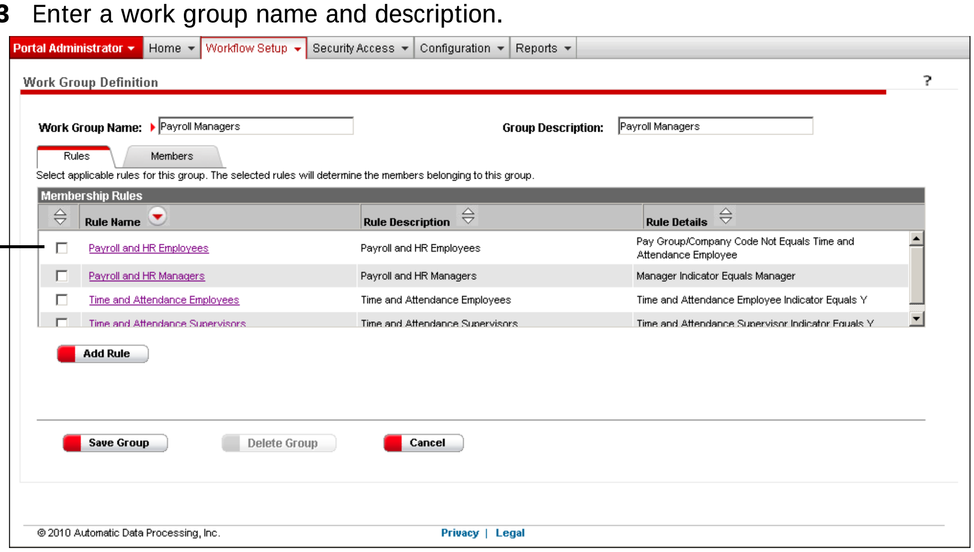
1 Point to **Workflow Setup** and select **Work Group Definition**.



2 Click **Add New**.

3 Enter a work group name and description.

In our example, the work group name and description define the people who will approve the direct deposit event.

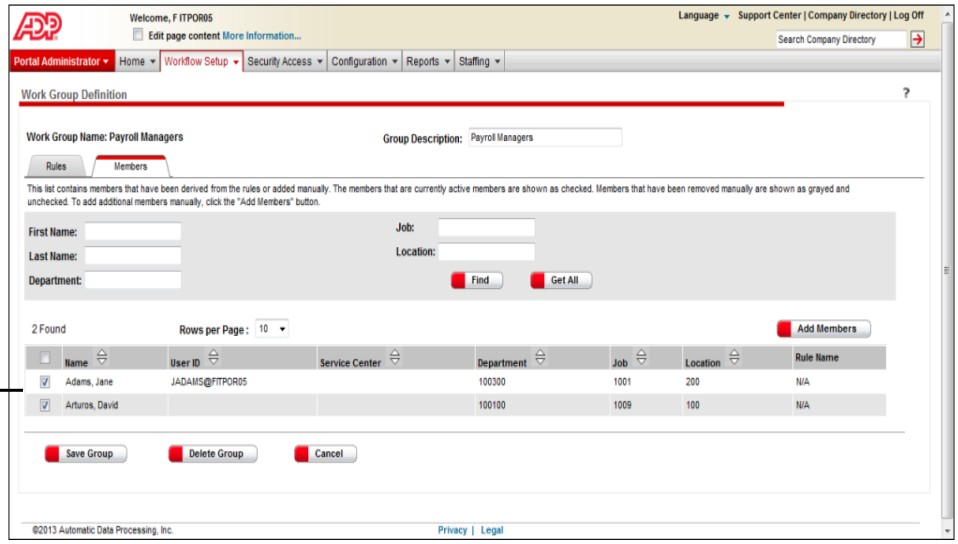


Note: On this page, you can choose to use an existing membership rule or create a membership rule to further define your work group. When you assign a membership rule to a work group, users who meet the rule's criteria are added. If you don't assign a rule, then you need to add members to your work group manually. In our example, we want to add two members manually.

4 Select the **Members** tab to add members manually.

5 Click **Add Members**.

6 In the list of users that are displayed at the bottom of the page, click to select the check box next to the users you want to add to your group.



In our example, these two users are added to the Payroll Managers work group. Payroll managers act as practitioners.

7 Click **Save Group**.

Selecting a Workflow Path

A workflow path is the route that the event follows in the workflow. A workflow path can have one or more steps, depending on the event. Once you create a workflow path, you assign it to the workflow.

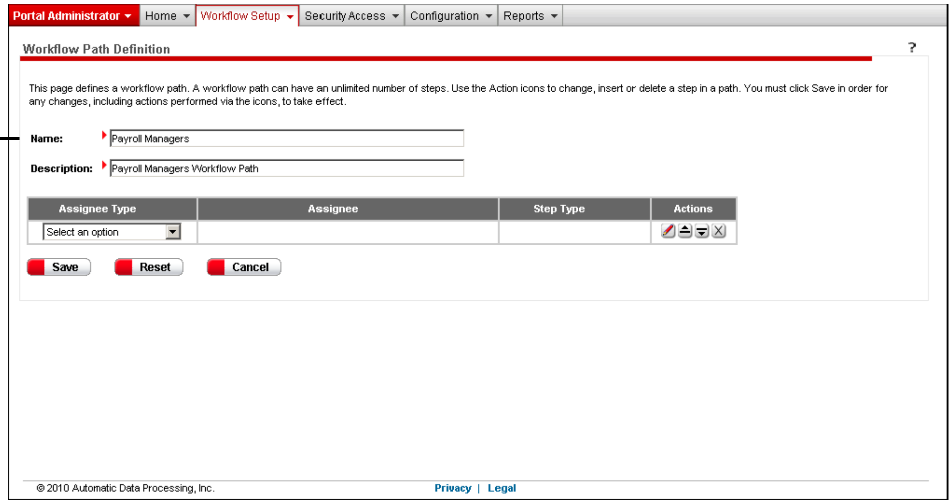
Important: Certain conditions change the way an event moves down the workflow path. For example, if you assign a workflow step to a work group that has no members in it, the step is skipped. If you assign a workflow step to a non-registered user, the event does not advance down the workflow path until the user registers or the step is rerouted. For more information, click ? (**Help**) in the top-right corner of the page.

1 Point to **Workflow Setup** and select **Workflow Path Definition**.

2 Click **Add New**.

3 Enter a workflow path name and description.

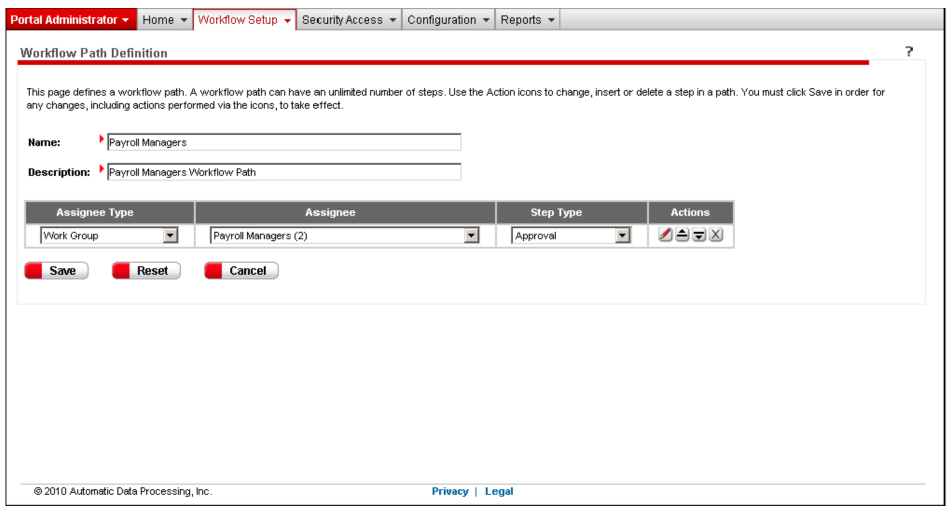
In our example, the workflow path name and description define the people included in the workflow path.



4 At the bottom of the page, do the following:

- Select the type of assignee to where the step will be routed.
- Select the assignee. The options you see are based on the type of assignee you choose.
- Select whether the step is an approval or a notification.

In our example, the direct deposit event will be routed to the Payroll Managers work group for their approval.



Note: You can also choose to route events to a specific user or to a specific level up. For details about these options, click ? (**Help**) in the top-right corner of the page.

5 When you are done, click **Save**.

Assigning the Workflow Path to the Workflow

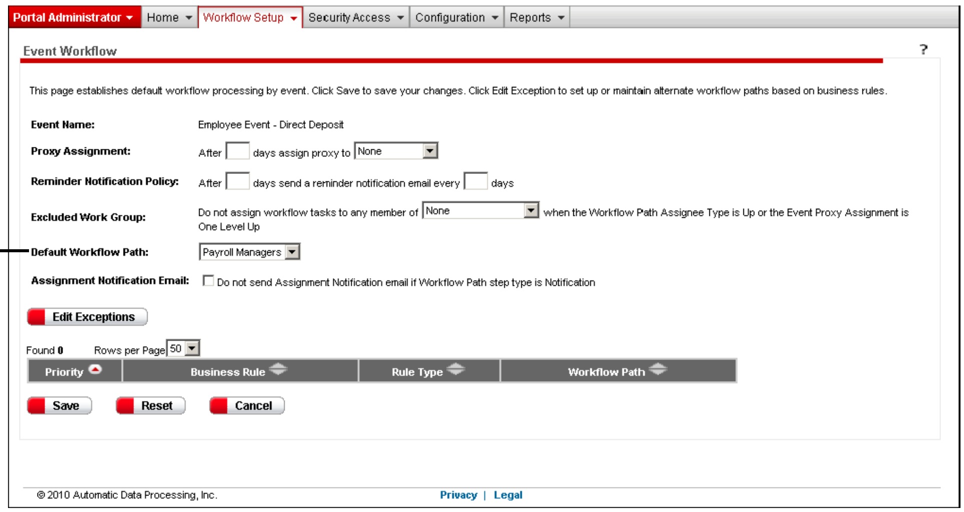
To complete the workflow, you need to assign the default workflow path to the workflow.

1 Point to **Workflow Setup** and select **Event Workflow**.

2 In the **Event Name** column, select the appropriate event. In our example, we need to select **Employee Event - Direct Deposit**.

3 In the **Default Workflow Path** field, select the workflow path that you want associated with the event.

In our example, we need to select **Payroll Managers**.



4 When you are done, click **Save**.

Note: For information about other options on this page, click ? (**Help**) in the top-right corner of the page.

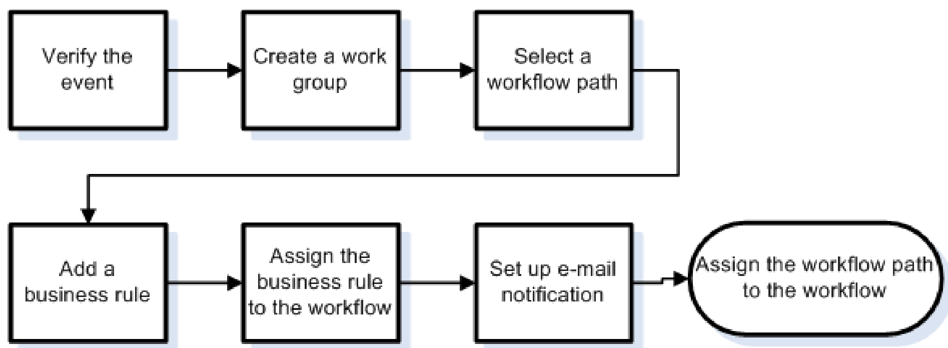
Creating a Complex Workflow

A complex workflow includes the tasks involved in setting up a simple workflow, but it can include other tasks such as adding a membership rule for a work group, adding a business rule, assigning a proxy, and setting up email notifications.

Example of a Complex Workflow

An example of a complex workflow is when an employee enters a value of greater than 10 for his or her federal tax exemptions. This type of event may require two levels of approval, the first from the payroll manager and the second from the HR manager responsible for the employee's department. In addition, this type of event requires a business rule that identifies that particular event as an exception to the standard workflow path for the tax withholding event.

This section outlines all of the tasks you may need to complete for this complex workflow, using the tax withholding event as a model.



Verifying the Event

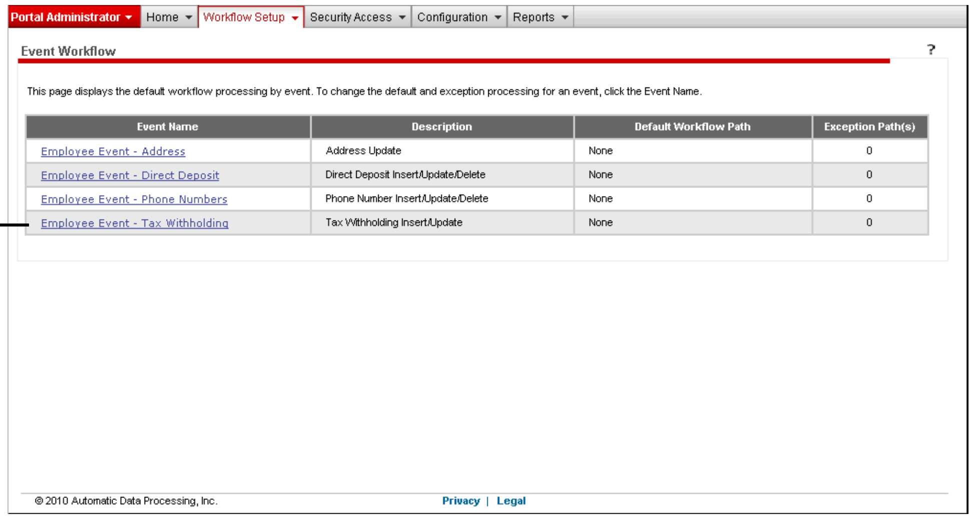
ADP provides a list of events for which you can set up workflows. You need to verify that the event for which you want to set up a workflow is included in that list.

1 Point to **Workflow Setup** and select **Event Workflow**.

2 In the **Event Name** column, view the listed events, and verify that the event you want to set up is displayed.

In our example, the event we need is **Employee Event - Tax Withholding**.

The options you see depend on the services your company is using.

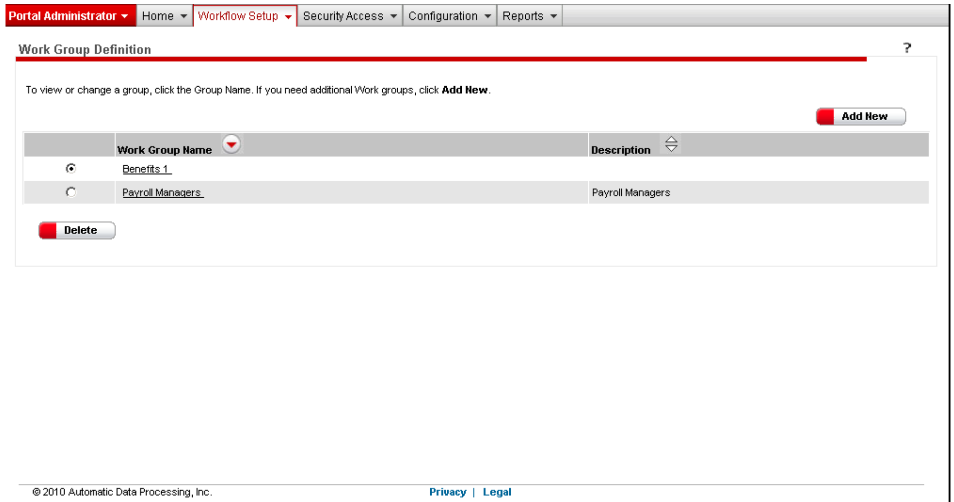


Creating a Work Group

A work group consists of the people to whom an event is routed for approval or notification. In our example, two work groups are needed for the workflow: one for the payroll managers and one for the HR managers who are responsible for the employee's department (Department 100000). The Payroll Managers work group was created earlier in the chapter for the direct deposit workflow and can be added to the tax withholding workflow.

To create the HR Managers work group, do the following:

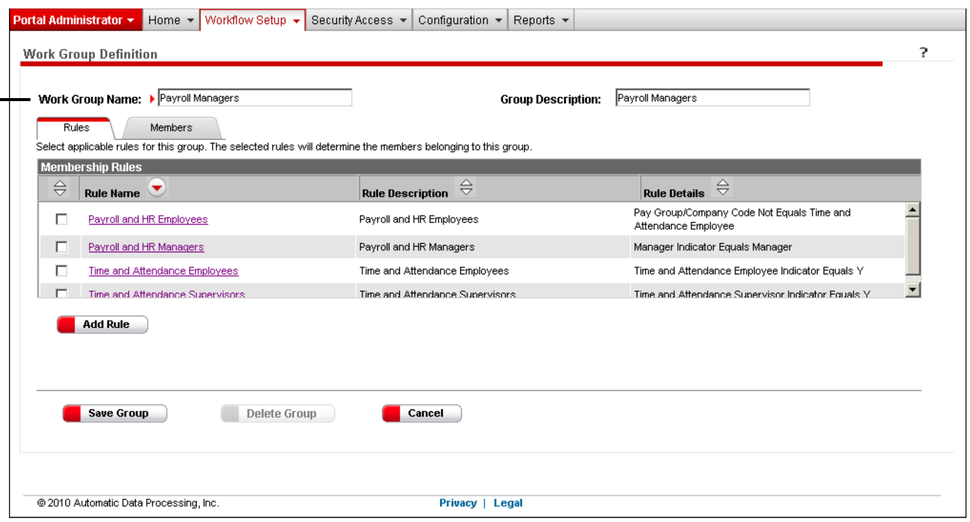
1 Point to **Workflow Setup** and select **Work Group Definition**.



2 Click **Add New**.

3 Enter a work group name and description.

In our example, the work group name and description define the second group of people who will approve the tax withholding event.

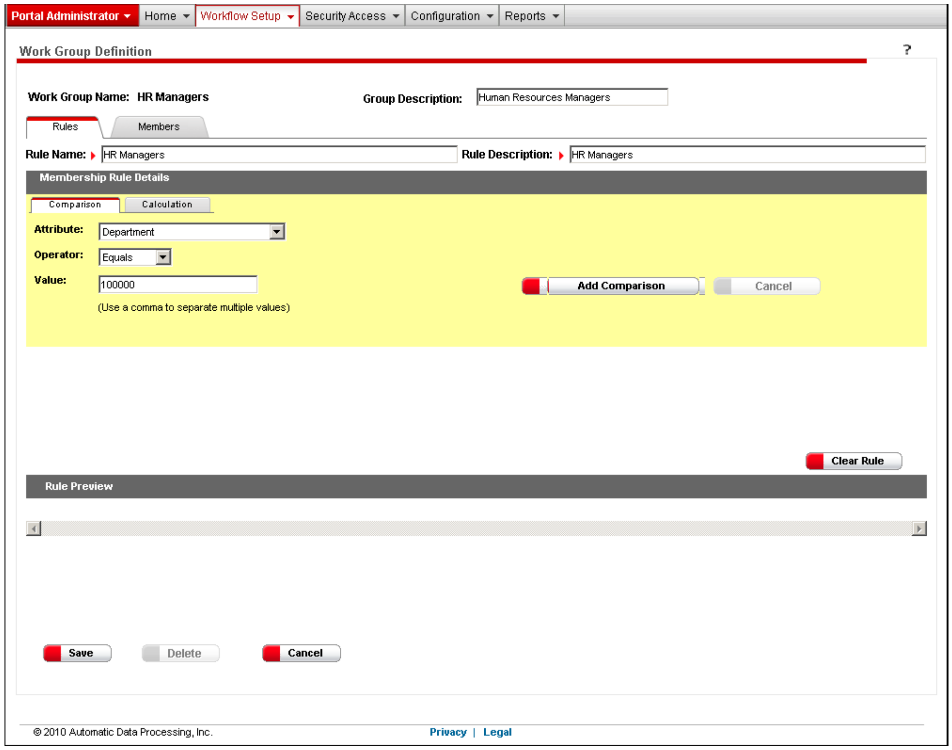


4 Determine if you want to add a membership rule to further define your work group. In our example, we need to create a two-part rule with comparison variables to indicate that members approving the event belong to Department 100000 *and also* have an HRMGR job code.

5 Create a membership rule by clicking **Add Rule**.

In our example, the rule name and description define the people in the work group.

6 Enter a rule name and description.



7 In the **Attribute**, **Operator**, and **Value** fields, enter the membership rule details. In our example, shown above, the details entered describe Department 100000.

Important: You must select the correct attribute and enter the correct value. What you should select and enter depends on the combination of modules your company is using. Refer to a list of membership rule attributes and values by clicking ? (**Help**) in the top-right corner of the page. In the left-navigation column, click **See more about Membership Rule attributes and values**.

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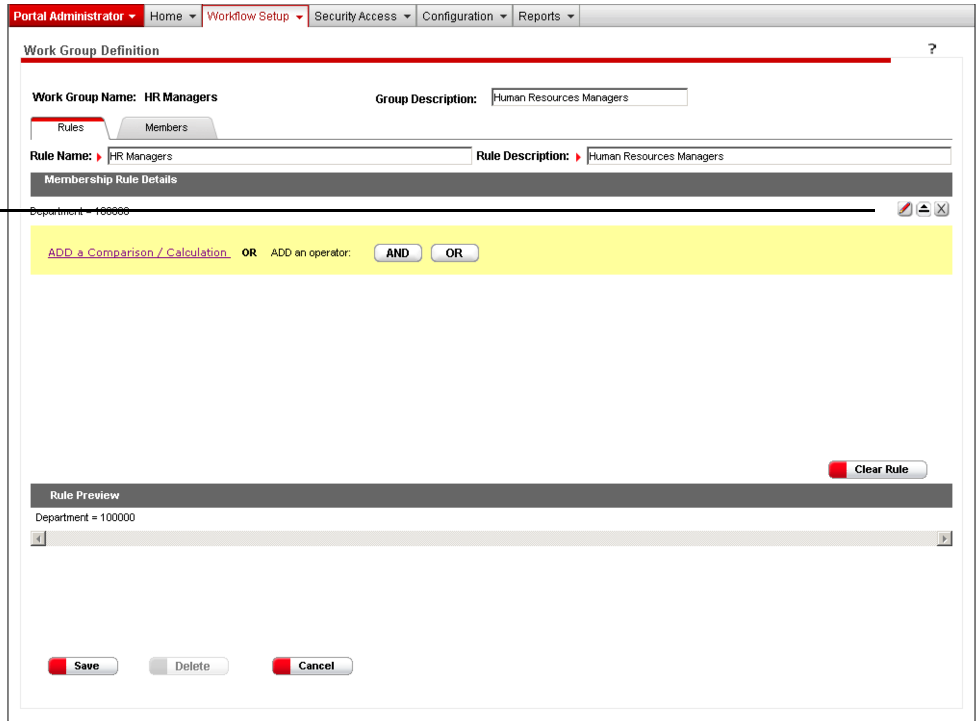
8 Click **Add Comparison**.

9 At the bottom of the page, in the **Rule Preview** area, verify the first part of the rule.

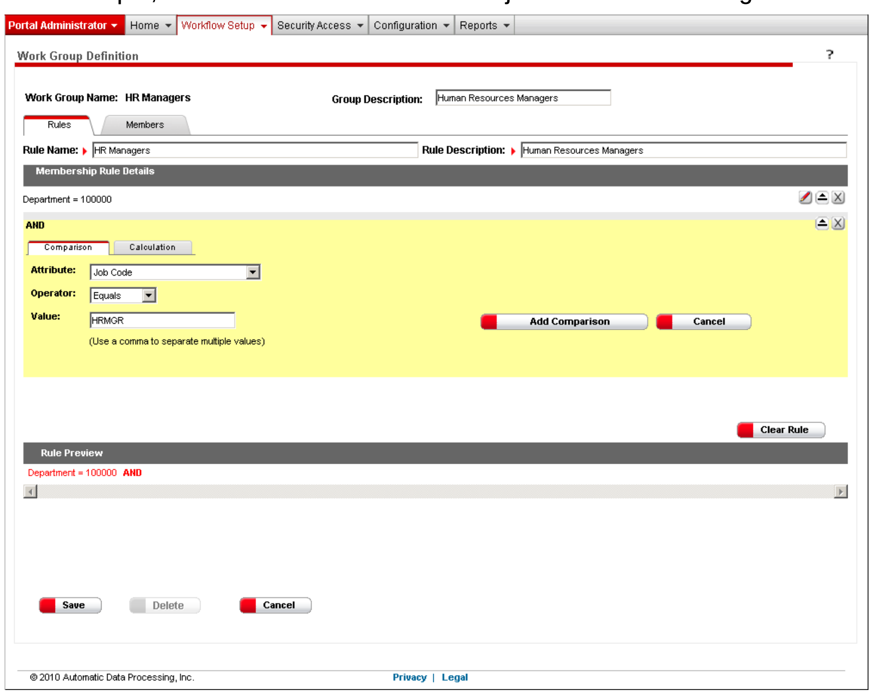
Use these icons to change your rule statement, if needed.



10 In our example, we want all the HR managers who are in Department 100000, so we need to add a second comparison variable. To add a second comparison variable, click **And**.

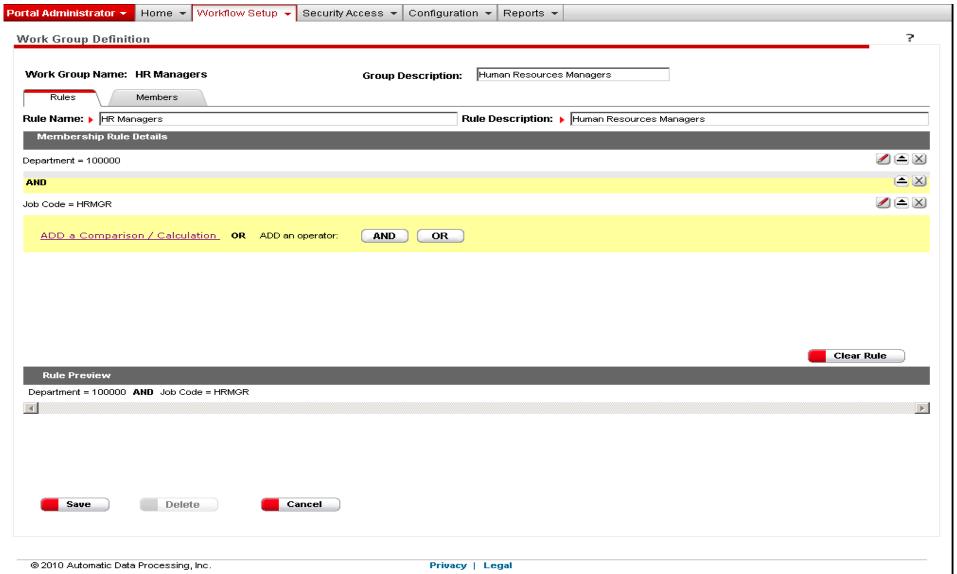
11 Click **Add a Comparison/Calculation**.

12 In the **Attribute**, **Operator**, and **Value** fields, enter the membership rule details. In our example, the details entered describe a job code of HR Manager.



13 Click **Add Comparison**.

14 At the bottom of the page, in the **Rule Preview** area, verify the complete rule.



Note: A calculation variable is used to define calculation logic - for example, for a group of managers who have been employed for 90 days or more. For more information about calculation statements, click ? (**Help**) in the top-right corner of the page.

15 When you are done, click **Save**. A list of users who meet the rule's criteria is generated.

Selecting a Workflow Path

A workflow path is the route that the event follows in the workflow. In our example, we need to set up a two-step workflow path that first goes to the Payroll Managers work group and then to the HR Managers work group.

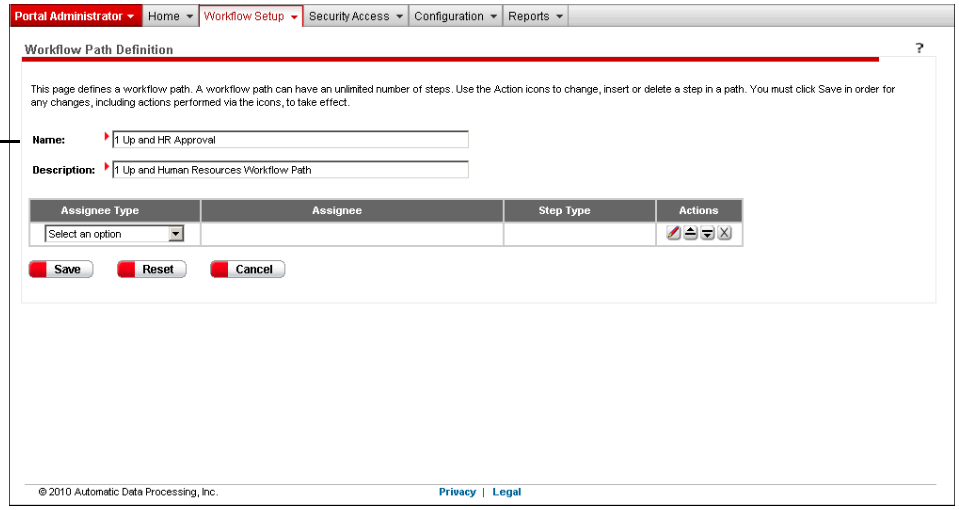
Important: Certain conditions change the way an event moves down the workflow path. For example, if you assign a workflow step to a work group that has no members in it, the step is skipped. If you assign a workflow step to a non-registered user, the event does not advance down the workflow path until the user registers or the step is rerouted. For more information, click ? (**Help**) in the top-right corner of the page.

1 Point to **Workflow Setup** and select **Workflow Path Definition**.

2 Click **Add New**.

3 Enter a workflow path name and description.

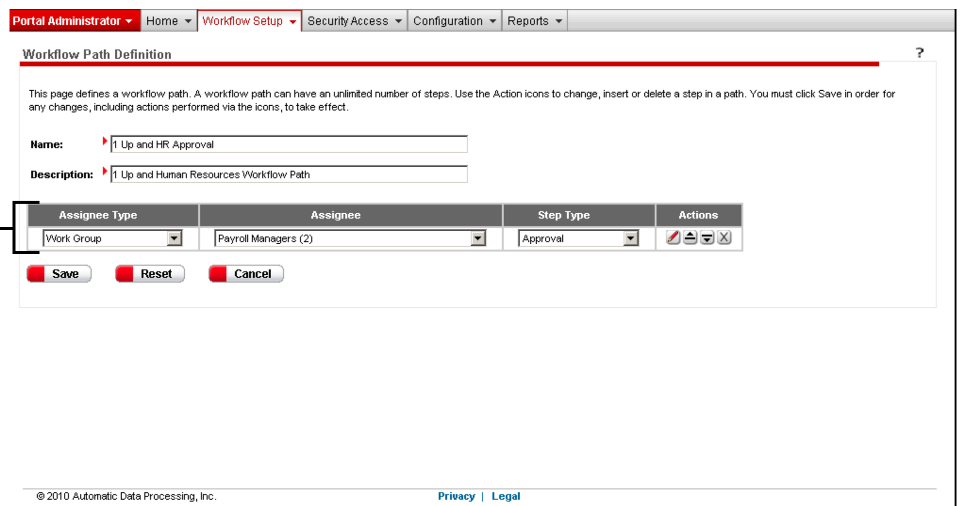
In our example, the workflow path name and description define the second and final step of the approval process. (HR managers are one level up from payroll managers.)



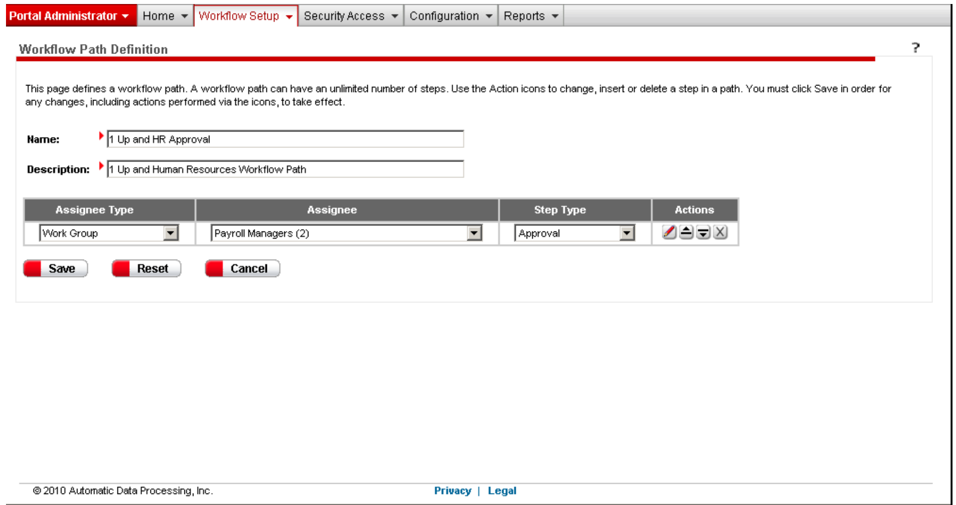
4 At the bottom of the page, add the two workflow path steps in the order that the event should be routed. To add Step 1, do the following:

- Select the type of assignee to where the step will be routed.
- Select the assignee. The options you see are based on the type of assignee you choose.
- Select whether the step is an approval or a notification.

In our example, for Step 1, the tax withholding event will be routed to the Payroll Managers work group for their approval.



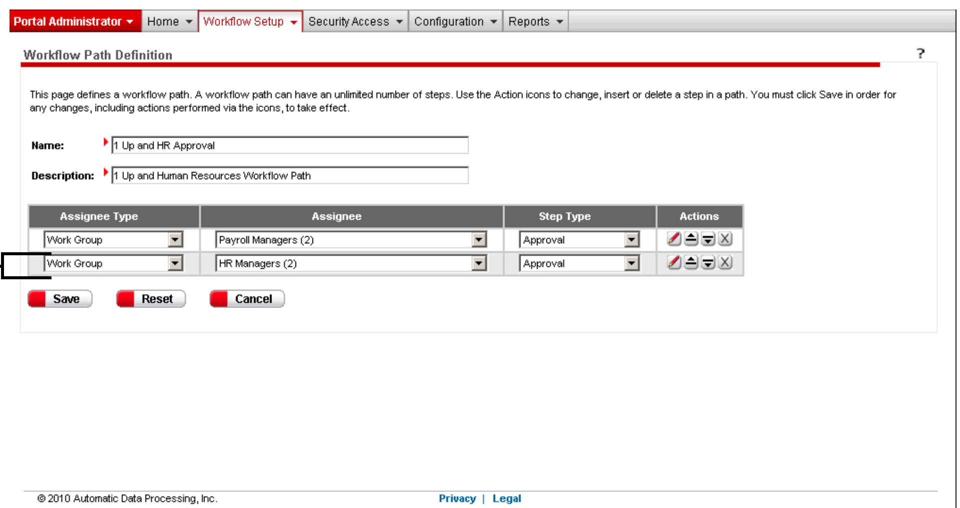
5 Add Step 2 by clicking (**Insert Below**) in the **Actions** column.



6 Do the following:

- Select the type of assignee to where the step will be routed.
- Select the assignee. The options you see are based on the type of assignee you choose.
- Select whether the step is an approval or a notification.

In our example, for Step 2, the tax withholding event will be routed to the HR Managers work group for their approval.



Note: You can add as many steps to a workflow path as you need. However, a step up cannot follow a specific user or a work group step. Also, if you are using multiple, consecutive work group steps, the work group names must be unique.

7 When you are done, click **Save**.

Adding a Business Rule

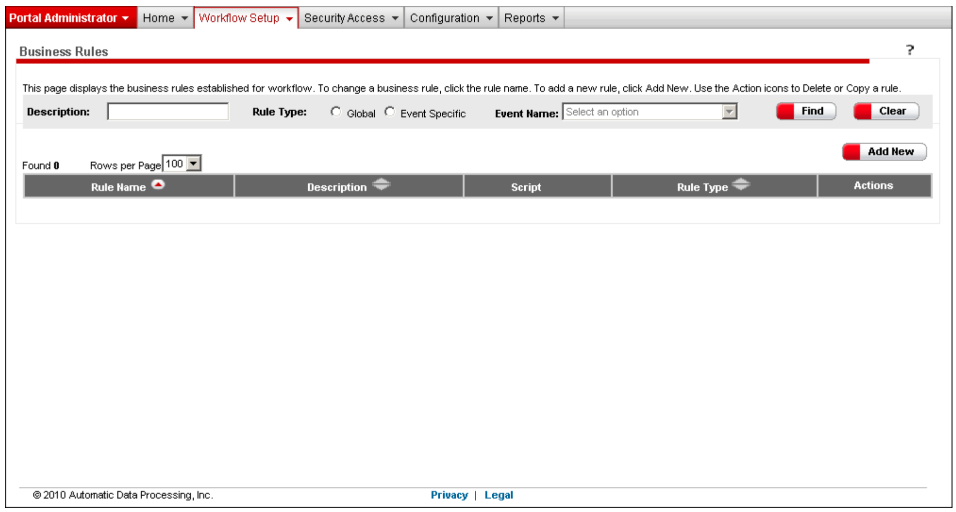
A business rule is used to create an exception to a default workflow path. You can create a global business rule that can be used as an exception for all event types, or an event-specific business rule to be used as an exception for a specific event. You can assign more than one business rule to a default workflow path.

It is not always necessary to assign a business rule to a default workflow path. These rules should be created and assigned based on your company's needs.

When creating business rules, be very specific when defining the change for which you want to trigger the workflow. Otherwise, the workflow may be triggered inappropriately.

In our example, we need to create an event-specific business rule that states that federal exemptions greater than 10 require HR manager approval.

1 Point to **Workflow Setup** and select **Business Rules**.

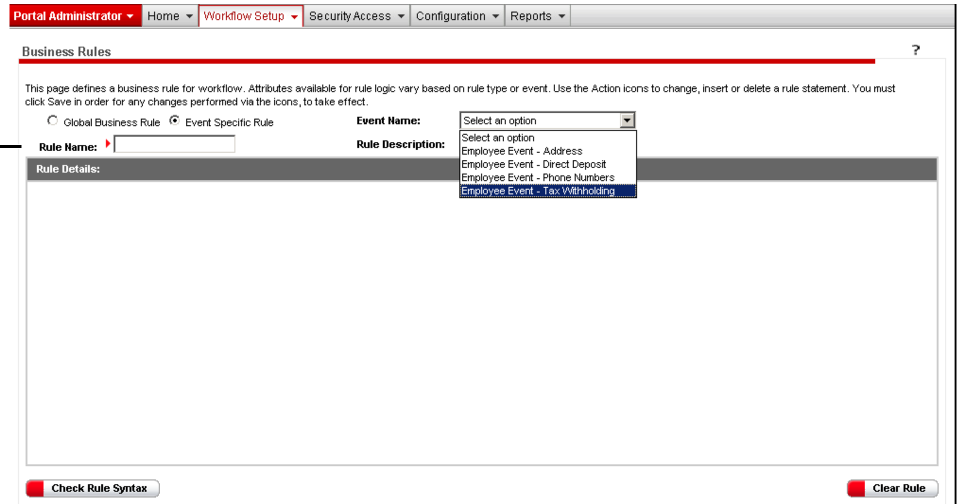


2 Click **Add New**.

Tip: For examples of business rules, click ? (**Help**) in the top-right corner of the page.

3 Choose to add either a global business rule or an event-specific business rule. If you choose an event-specific rule, select the event for which you need a rule in the **Event Name** field.

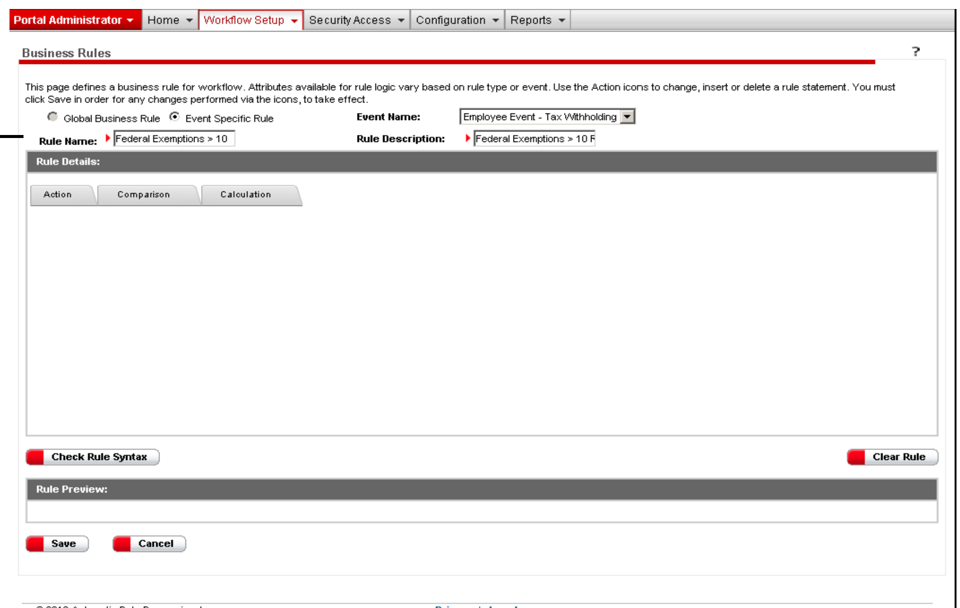
In our example, we need to select **Event Specific Rule**, and then select **Employee Event - Tax Withholding**.



Tip: For information about global business rules, click ? (**Help**) in the top-right corner of the page.

4 In the **Rule Name** and **Rule Description** fields, enter descriptive information.

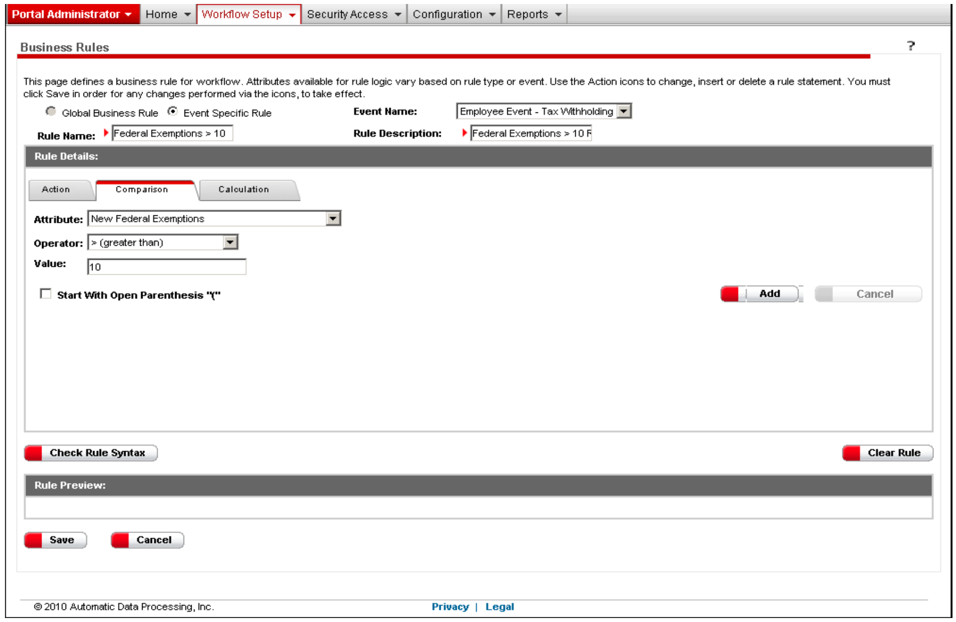
In our example, the rule name and description define the exception to the standard workflow path for the tax with-holding event.



5 In the **Rule Details** area, determine whether you need to define your business rule by adding an action, a comparison, or a calculation. (Refer to "Other Business Rule Definitions" on page 42 for more information.) In our example, we want to create a comparison variable, so we click **Comparison**.

Note: An action is used only for employee events.

6 Enter the business rule details. Make selections from the options that are available to you. In our example, we need to compare the federal tax exemption value to greater than 10.



Note: If you are creating a business rule for an employee address, phone number, or emergency contact event, you must select an attribute that matches the employee fields on the **Personal Information** pages.

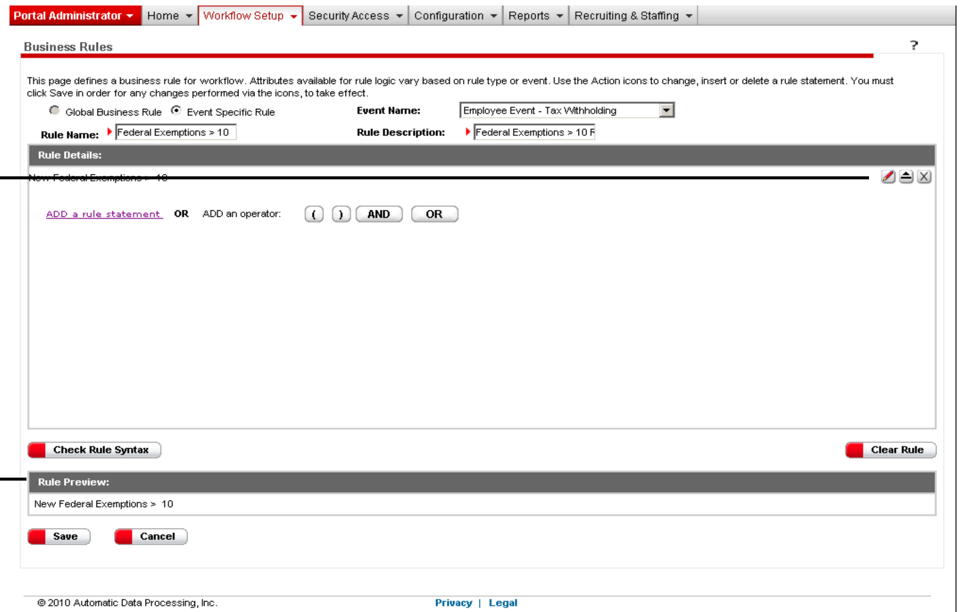
7 Click **Add**.

8 Review your business rule by clicking **Check Rule Syntax**. If the rule is incomplete or contains errors, it will be displayed in red in the **Rule Preview** area. Hover your cursor over the red text for more information.

- If needed, change your rule by using the icons.
- If no errors are detected, click **OK**.

Use these icons to make changes to a rule statement.

Check your rule here.



9 When no more changes are needed, click **Save**.

Note: You can test the business rule by adding it to a default workflow path and conducting the associated event.

Other Business Rule Definitions

A *calculation variable* is used to define calculation logic. For example, if a standard salary change plus a proposed additional salary change for an employee exceeds a certain percentage, a second manager needs to approve the event.

An *action* is used only for employee events that involve adding, updating, or deleting information. For example, if an employee has a baby and adds the baby as a new dependent, HR approval is required since information such as the baby's birth certificate needs to be verified.

Note: These events are available if your company uses the HR module.

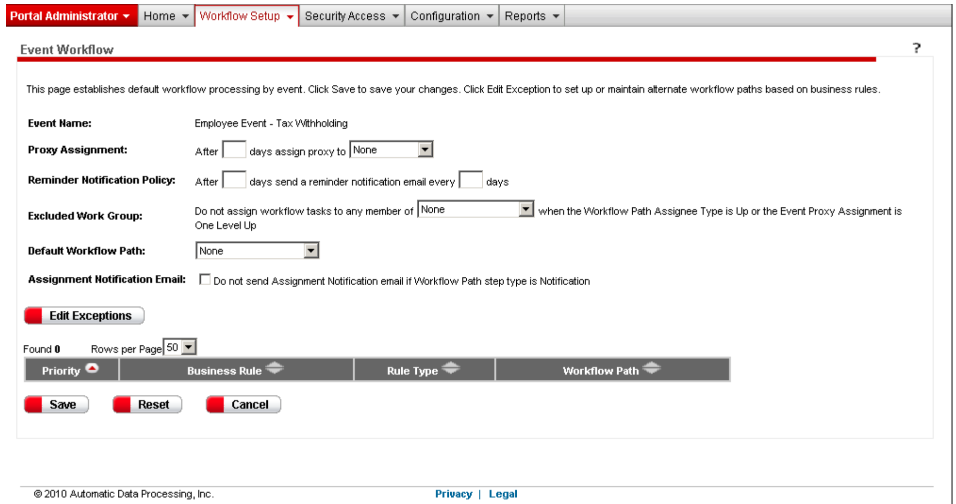
Assigning the Business Rule to the Workflow

After you create the business rule, you need to assign it to the workflow.

1 Point to **Workflow Setup** and select **Event Workflow**.

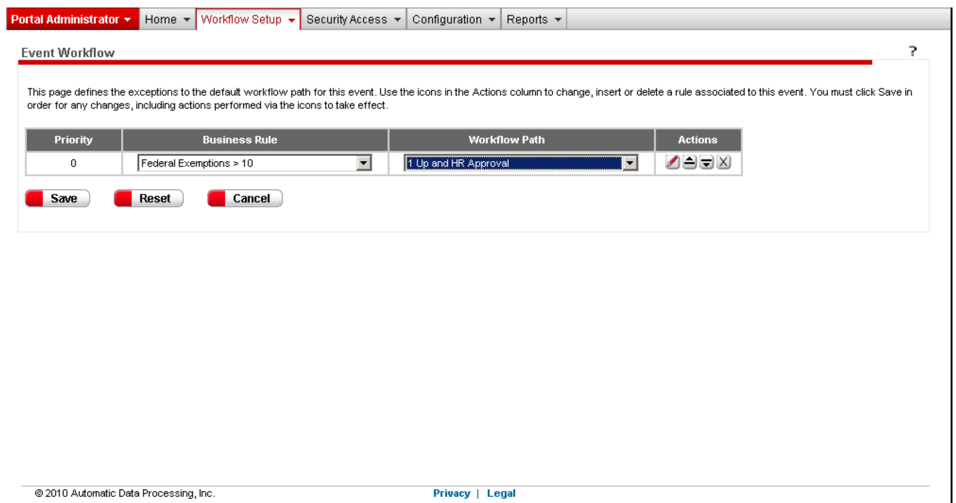
2 In the **Event Name** column, select the appropriate event. In our example, we need to select **Employee Event – Tax Withholding**.

3 At the bottom of the page, click **Edit Exceptions**.



4 Select the appropriate business rule and workflow path.

In our example, we need to select the business rule and workflow path that we created for this workflow.



Note: If you have more than one exception to your default workflow path, you can control the order in which these exceptions are applied. Click (**Insert Above**) and (**Insert Below**) to add your exceptions in the order you want. You may need to click **Enable Priority Processing** to set up this ability. For more information, click ? (**Help**) in the top-right corner of the page.

5 Click **Save**.

Email Notification

You can set up email notification for a workflow to notify users of action required or taken. You can set up global emails and event-specific emails. Notifications are sent to the employee's security management email address.

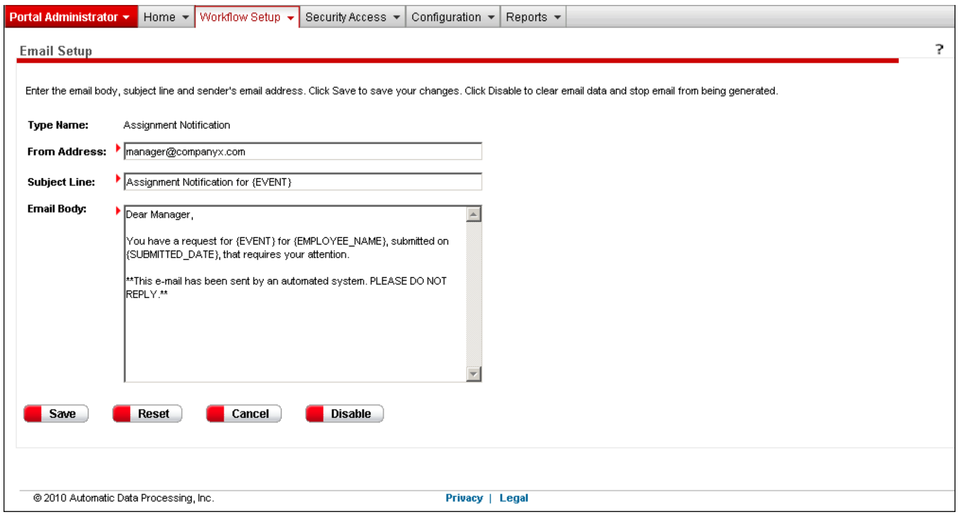
Note: Employees can keep their security management email addresses up to date by clicking the **Update My Security Profile** link on the ADP Workforce Now logon page.

Global Emails

Global emails apply to all events and are sent automatically when the event occurs. A global email can be sent to assignees in a workflow path to notify them that an employee event has been submitted and requires their approval. Another global email can be sent to employees to confirm that an event they submitted was approved.

Note: If you set up a global Assignment Notification email, you do not have to send it to users who are only being notified about a workflow step. You make this selection on the Event Workflow page. (Refer to "Assigning the Workflow Path to the Workflow" on page 47.)

Example of a Global Email



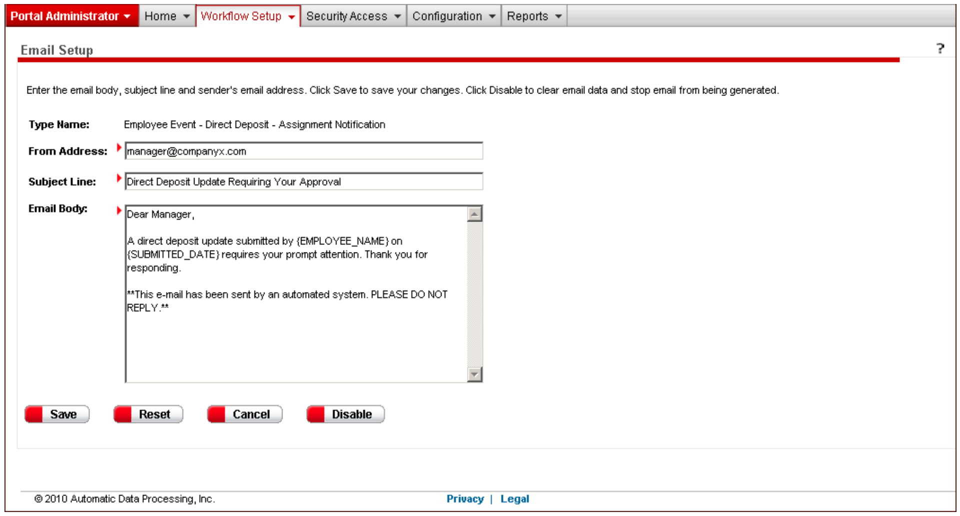
Event-Specific Emails

An event-specific email is used to notify assignees in a workflow path about a specific event. It is only sent if you set it up and then make the selection on the Event Workflow page. (Refer to "Assigning the Workflow Path to the Workflow" on page 47.)

Important: An event-specific email takes the place of a global assignment notification. This means that when you choose to send an event-specific email, a global Assignment Notification email does not go out.

Perhaps an employee updates his or her account number and would appreciate future paychecks deposited to this new account as soon as possible. You can set up an event-specific email that lets the assigned approver know a direct deposit event has been submitted and requires a timely response.

Example of an Event-Specific email

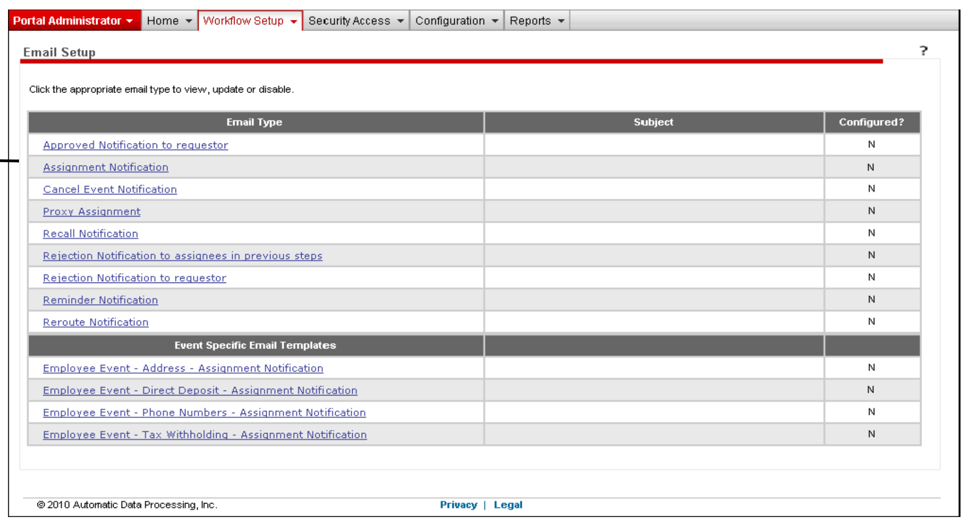


Setting Up Email Notifications

To set up an email notification, do the following:

1. Point to **Workflow Setup** and select **Email Setup**. This page provides your available templates and tells you which ones have been set up (configured).
2. Global emails are listed in the **Email Type** area of the page. Event-specific emails are listed in the **Event Specific Email Templates** area right below it. Click the type of email you want to set up.

In our complex workflow example, we can set up a global Assignment Notification email.

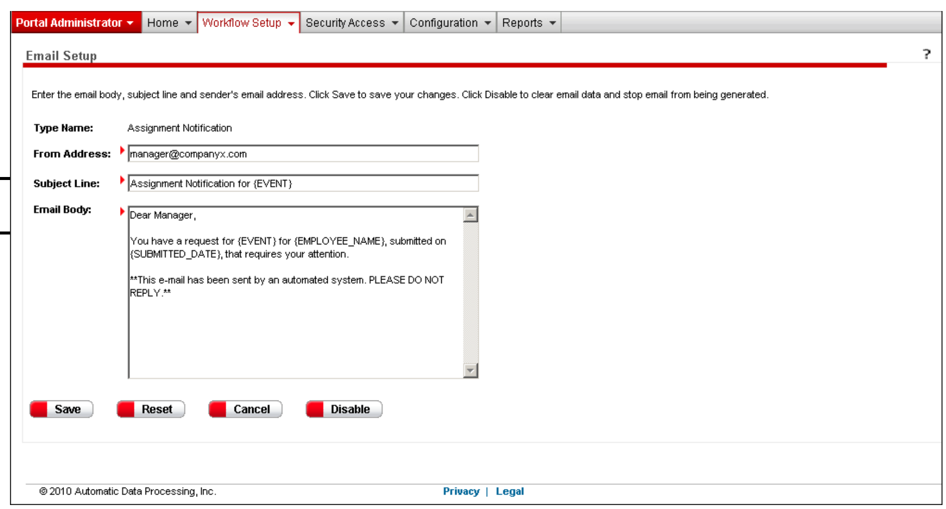


3 Enter information in the **From Address** field, **Subject Line** field, and **Email Body** box. In the **Subject Line** field and **Email Body** box, you can use the variables below to personalize the text. The email is updated automatically with the specific information you choose to display (for example, the event name or the date the event was submitted).

To Display The	Include This Variable
Event name	{EVENT}
Submitter's name	{NAME}
Affected employee's name	{EMPLOYEE_NAME}
Date the event was submitted	{SUBMITTED_DATE}
• Number of events awaiting approval that have passed the number of days set up in the Reminder Notification policy (for Reminder Notification emails) • Number of records reassigned to a new approver when an event is rerouted (for Reroute Notification emails)	{NUMBER_OF_RECORDS}

In our example, the subject line describes the event and includes a variable for the event name.

In the body, variables are included for the event name, the affected employee's name, and the date the event was submitted.



4 Click **Save**.

Assigning the Workflow Path to the Workflow

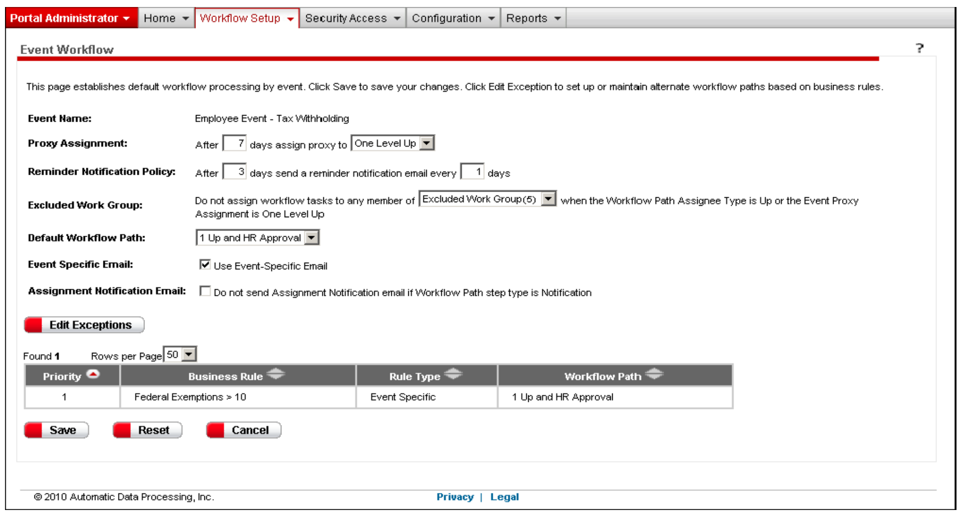
To complete the workflow, you need to assign the default workflow path to the workflow. On this page, you can also set up a proxy, exclude a work group from addressing workflow tasks, and manage email notifications.

1 Point to **Workflow Setup** and select **Event Workflow**.

2 In the **Event Name** column, select the appropriate event. In our example, we need to select **Employee Event - Tax Withholding**.

3 Make your selections. In our example, we want to do the following:

- Select **1 Up and HR Approval** as the default workflow path.
- Reroute the workflow task to a proxy who is one level up after 7 days, if needed.
- Send a reminder notification to assignees once a day after 3 days, if needed.
- Exclude certain users from having to address a workflow task when a step in a workflow path is routed up to them. **Note:** You need to set up a work group for these users.
- Send an event-specific email notification that we set up.



Note: For assistance completing this page, click ? (**Help**) in the top-right corner of the page.

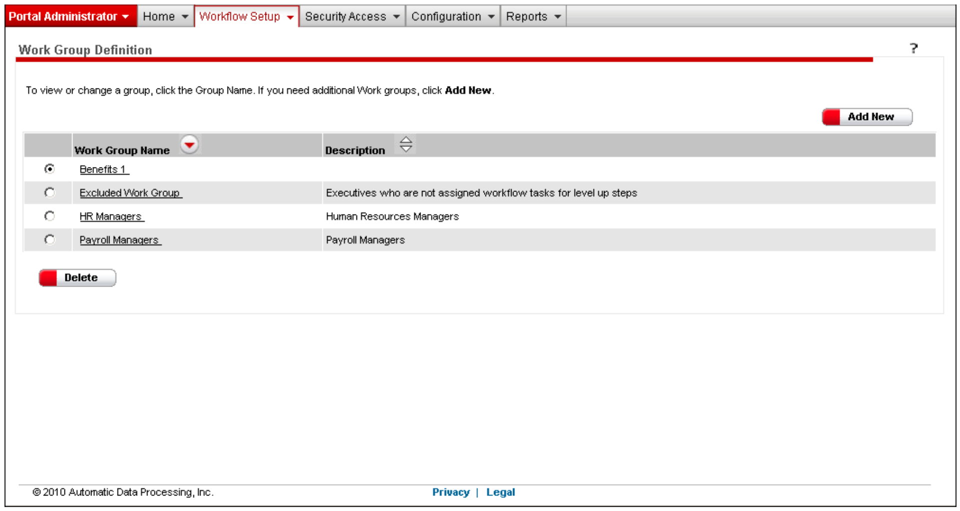
4 When you are done making all of your selections on this page, click **Save**.

Changing or Deleting a Work Group

Changing a Work Group

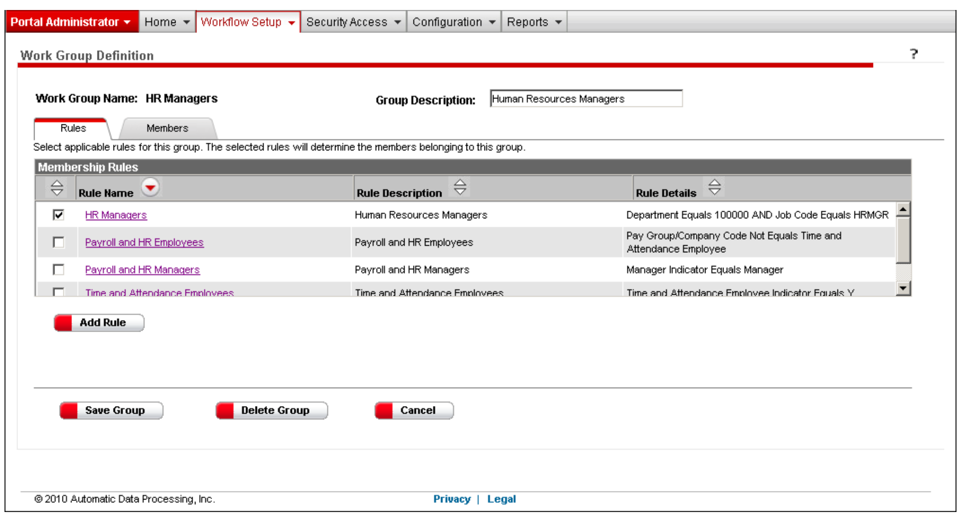
When you change a work group, any workflows associated with that work group are automatically updated with the change.

1 Point to **Workflow Setup** and select **Work Group Definition**.



2 Click the name of the work group you want to change.

3 Change information as needed.



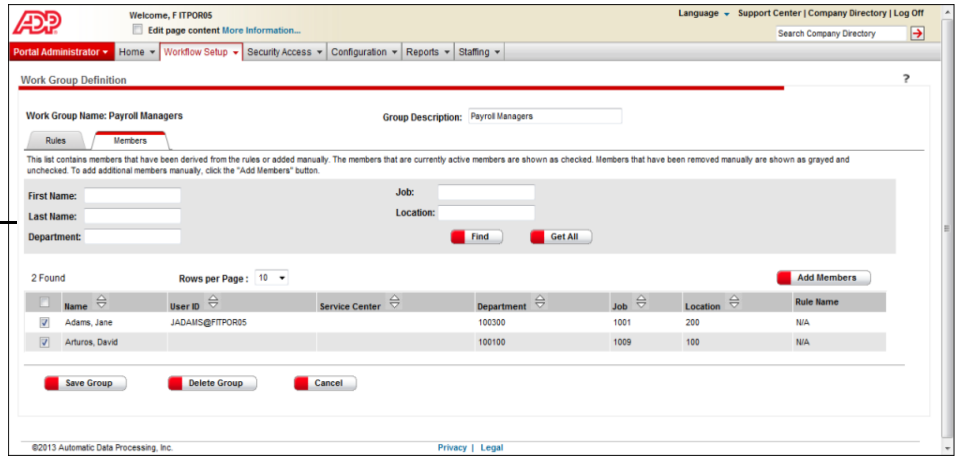
4 To add or remove a rule, click the associated check box, or click **Add Rule** to create a new rule.

Note: Removing a rule will not remove members that were added to the group manually.

5 To add or remove individual members, select the **Members** tab and do any of the following:

- To add members, click **Add Members**.
- To remove members, click to clear the appropriate check boxes.

To locate a member, enter information in this area, and then click **Find**.

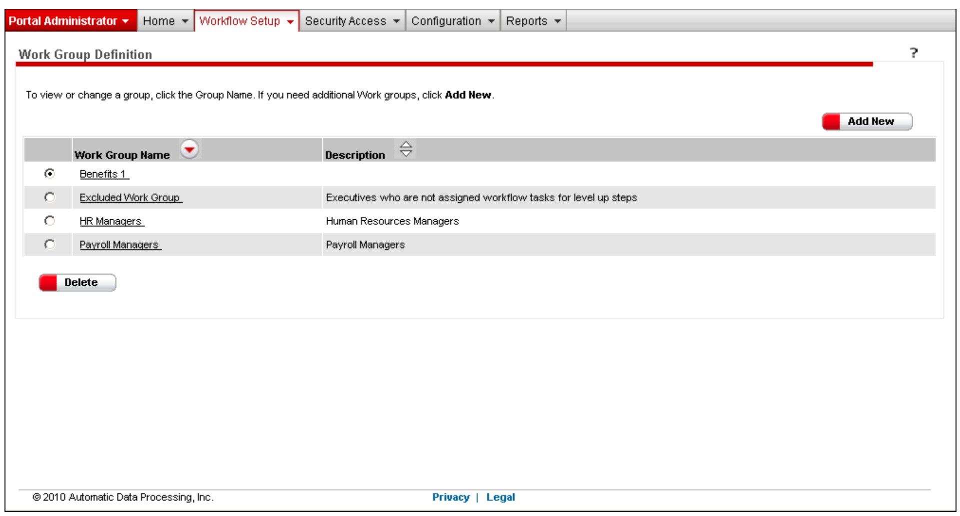


6 Click **Save Group**.

Deleting a Work Group

If you delete a work group that is assigned to a workflow path directly or by proxy, the workflow step assigned to this group or proxy will be skipped.

1 Point to **Workflow Setup** and select **Work Group Definition**.



2 Click to select the radio button next to the work group you want to delete.

3 Click **Delete**, and then click **OK** to confirm your action.

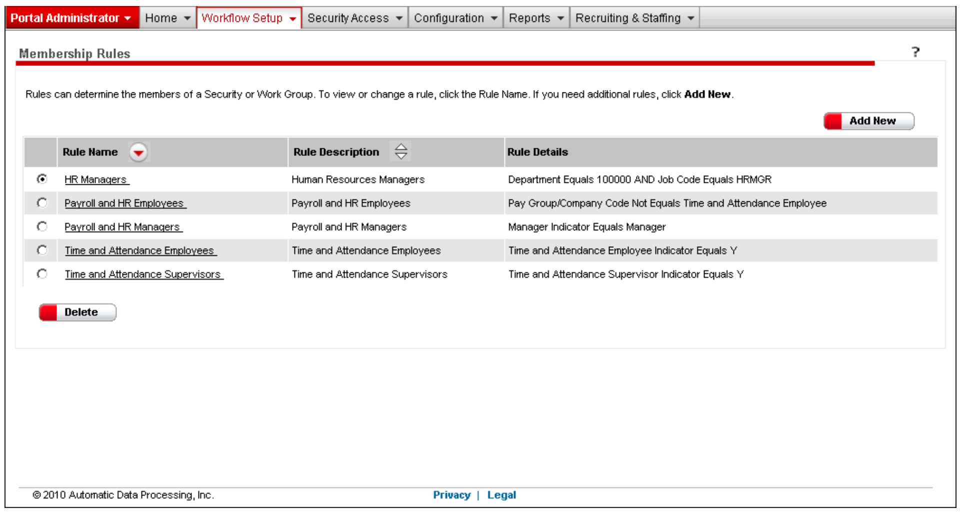
Changing or Deleting a Membership Rule

Changing a Membership Rule

You cannot change a membership rule that is assigned to a work group or a security group. You must first unassign the rule from any work groups or security groups to which it is assigned. Another option is to create a new rule.

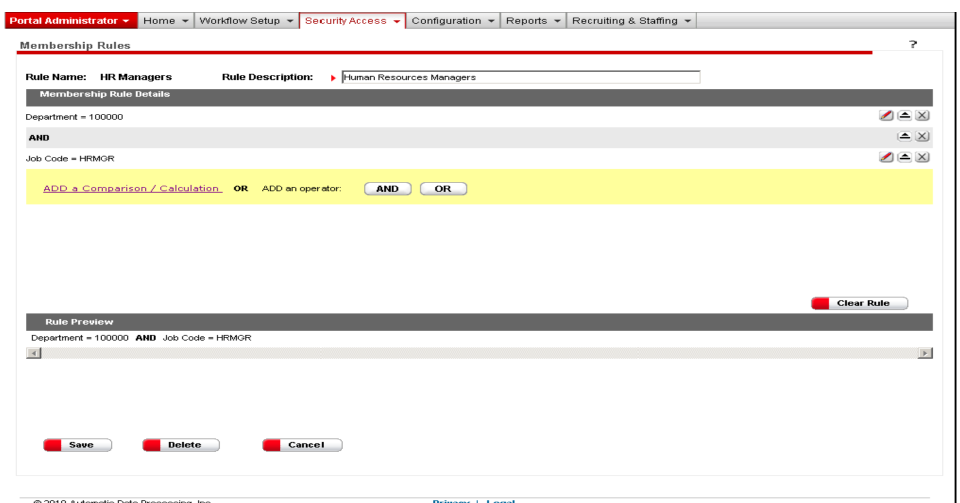
Note: Information on managing security groups is provided in the *ADP Workforce Now® Security Guide*.

1 Point to **Security Access** and select **Membership Rules**.



2 Click the name of the rule you want to change.

3 Change information as needed.



Tip: Use the icons to make changes to a rule statement. Click **Clear Rule** to delete the entire rule.

4 Verify your rule in the **Rule Preview** box at the bottom of the page.

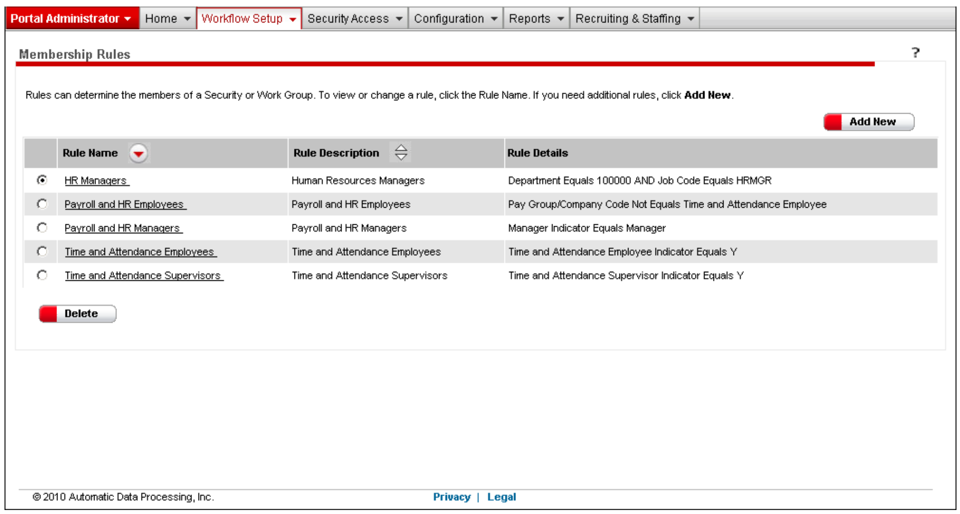
5 When you are done, click **Save**.

Tip: For more information about managing membership rules, click ? (**Help**) in the top-right corner of the page.

Deleting a Membership Rule

You cannot delete a membership rule that is assigned to a work group or a security group. You must first unassign the rule from any work groups or security groups to which it is assigned.

1 Point to **Security Access** and select **Membership Rules**.



2 Click to select the radio button next to the rule you want to delete.

3 Click **Delete**, and then click **OK** to confirm your action.

Changing or Deleting a Workflow Path

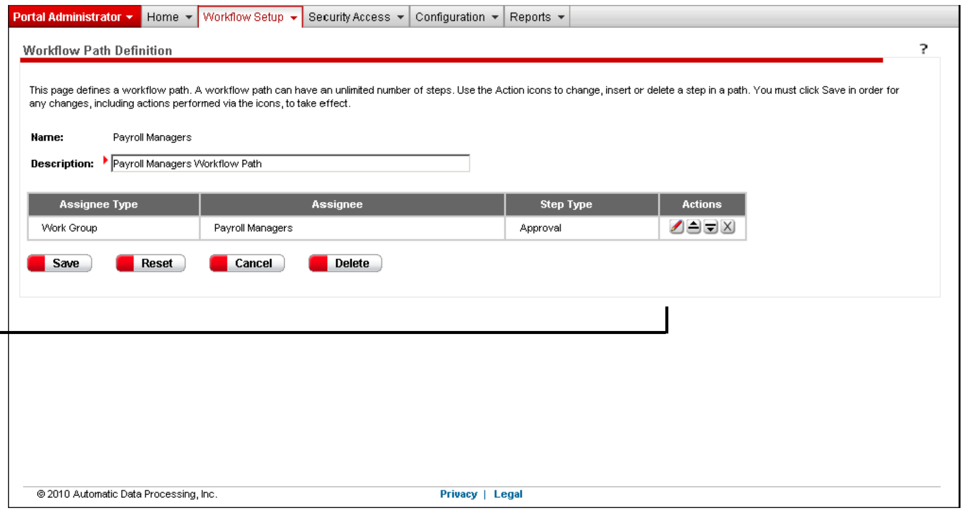
Changing a Workflow Path

You can change a workflow path at any time.

1 Point to **Workflow Setup** and select **Workflow Path Definition**.

2 Click the workflow path you want to change.

3 Make your changes.



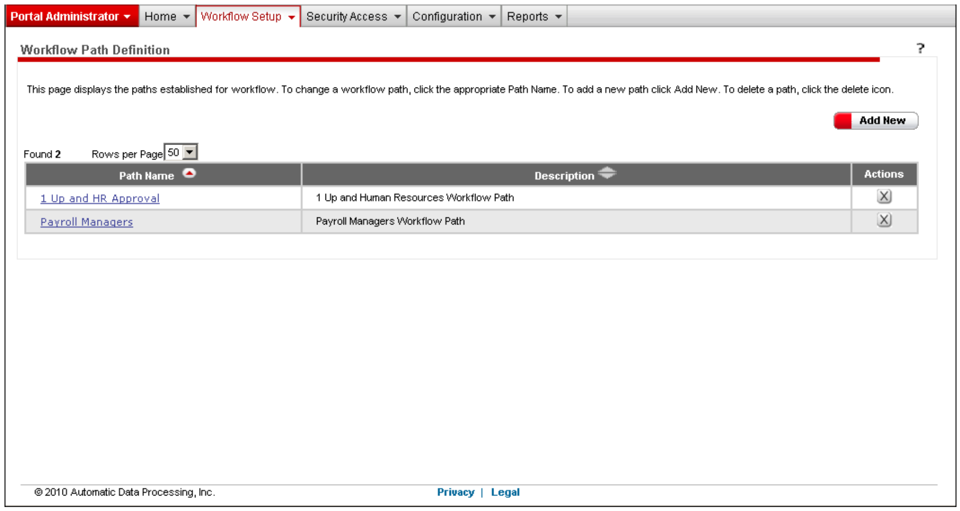
Use these icons to make changes to a step in the workflow path.

4 Click **Save**.

Deleting a Workflow Path

You cannot delete a workflow path that is associated with an event as either the default workflow path or an exception to the workflow path. You must first remove the workflow path from the event.

1 Point to **Workflow Setup** and select **Workflow Path Definition**.



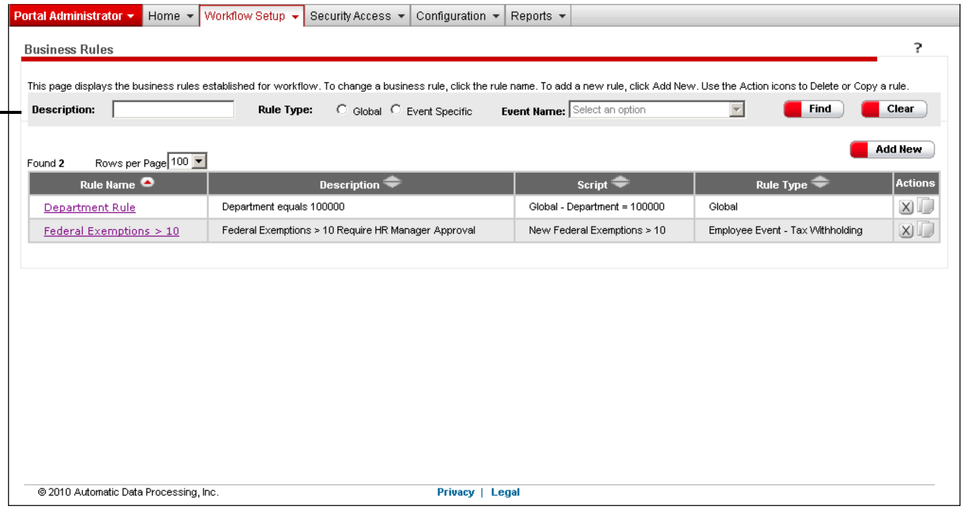
2 Click (**Delete**) to the right of the workflow path you want to remove, and then click **OK** to confirm your action.

Managing Business Rules

Changing a Business Rule

1 Point to **Workflow Setup** and select **Business Rules**.

To locate a business rule, enter or select information in this area, and then click **Find**.

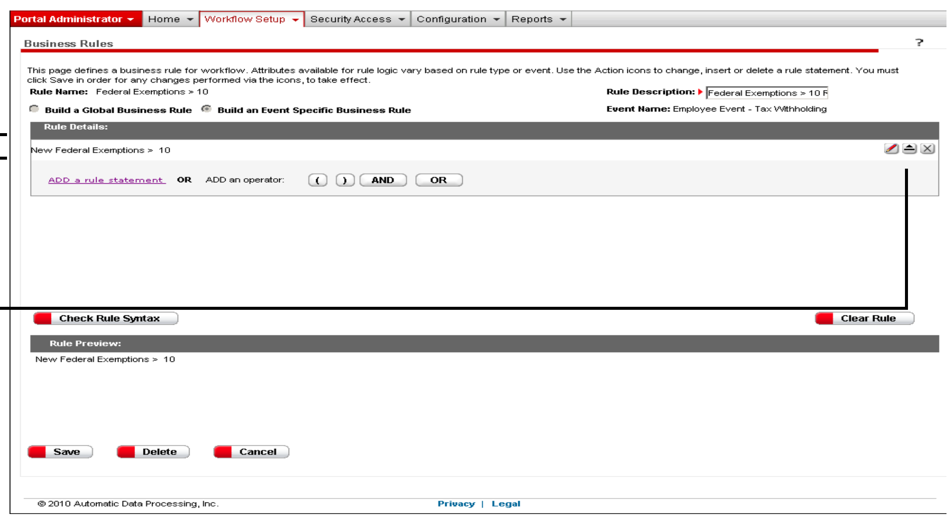


2 Click the rule you want to change.

3 Make your changes.

Use these options to make additions to your business rule.

Use these icons to change a rule statement.



4 Review your changes by clicking **Check Rule Syntax**. If the rule is incomplete or contains errors, it will be displayed in red in the **Rule Preview** area. Hover your cursor over the red text for more information.

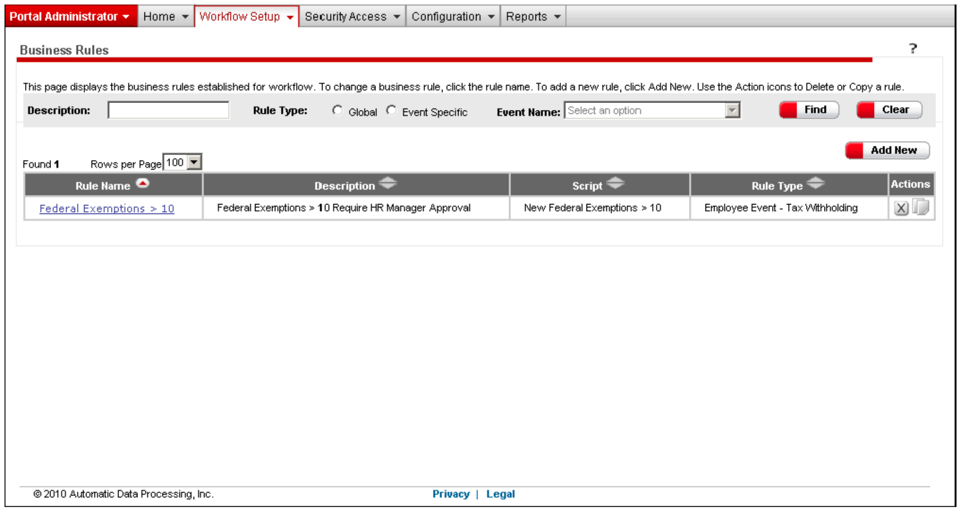
5 When no more changes are needed, click **Save**.

6 Test the business rule by assigning it to a workflow and conducting the associated event.

Deleting a Business Rule

You cannot delete a business rule that is associated with an event. You must first remove the business rule from the event.

1 Point to **Workflow Setup** and select **Business Rules**.



2 Click (**Delete**) to the right of the rule you want to delete, and then click **OK** to confirm your action.

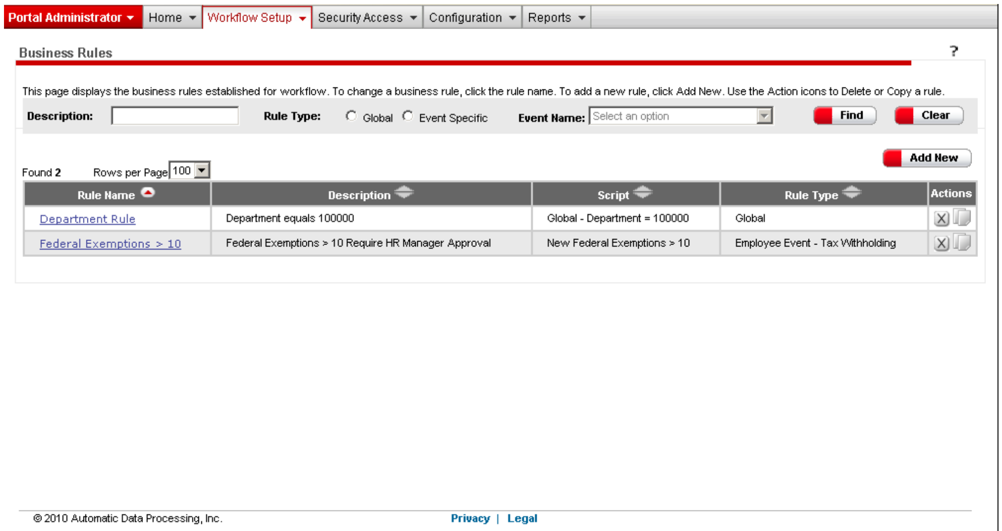
Copying a Business Rule

You can copy an existing business rule to a new rule and then make changes to it. You can copy:

- From a global rule to a global rule
- From a global rule to an event-specific rule
- From an event-specific rule to an event-specific rule, if the event is the same

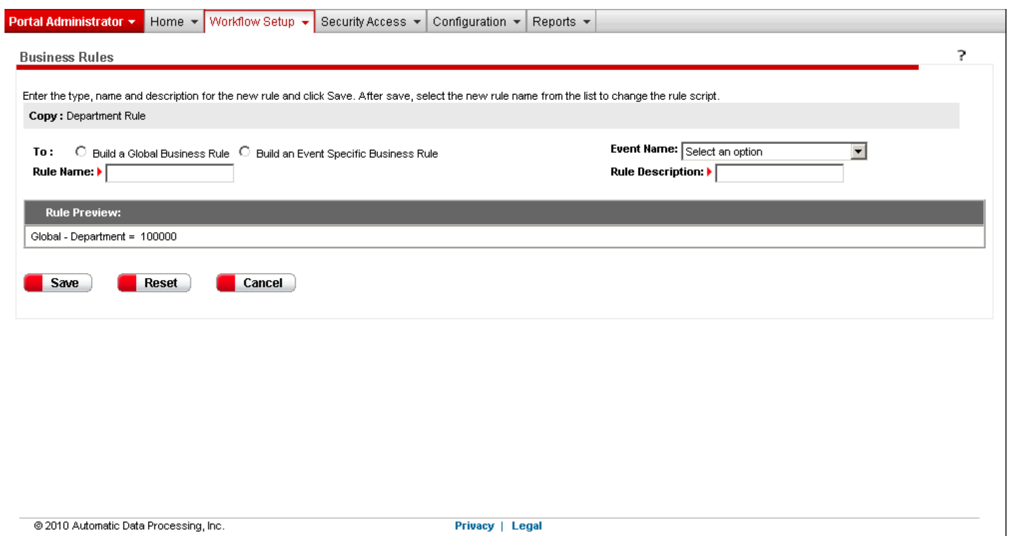
To copy a business rule, do the following:

1 Point to **Workflow Setup** and select **Business Rules**.



2 Click (**Copy**) to the right of the business rule you want to copy.

3 Select the rule type. (You cannot do this if you are copying an event-specific rule.)



4 Enter a new business rule name and description.

5 Click **Save**. This returns you to the updated Business Rules page.

6 Select the new rule from the list.

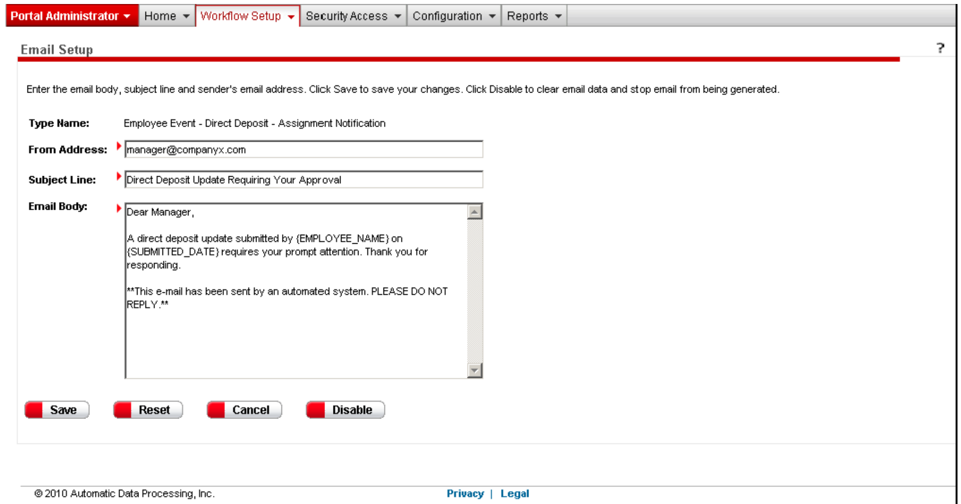
7 Make your changes.

8 Click **Save**.

Stopping Email Notifications

You can stop an email notification from being sent.

1. Point to **Workflow Setup** and select **Email Setup**.
2. Click the name of the email you want to stop sending.



3. Click **Disable**, and then click **OK** to confirm your action. The template for this email is cleared, and the email is no longer sent.

Managing Events

Checking the Status of an Event

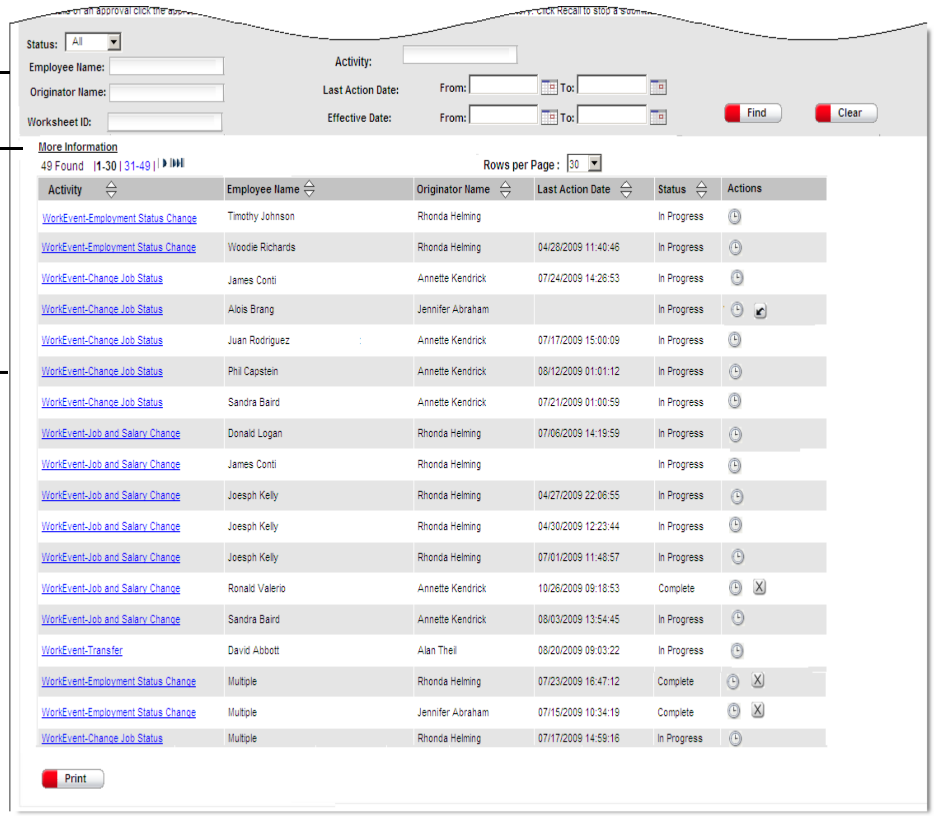
You can check the status of all events in which you participated on the Approval History page.

1 Point to **Home** and select **Approval History**.

To refine your list, enter information in this area, and then click **Find**.

Click here to view additional columns.

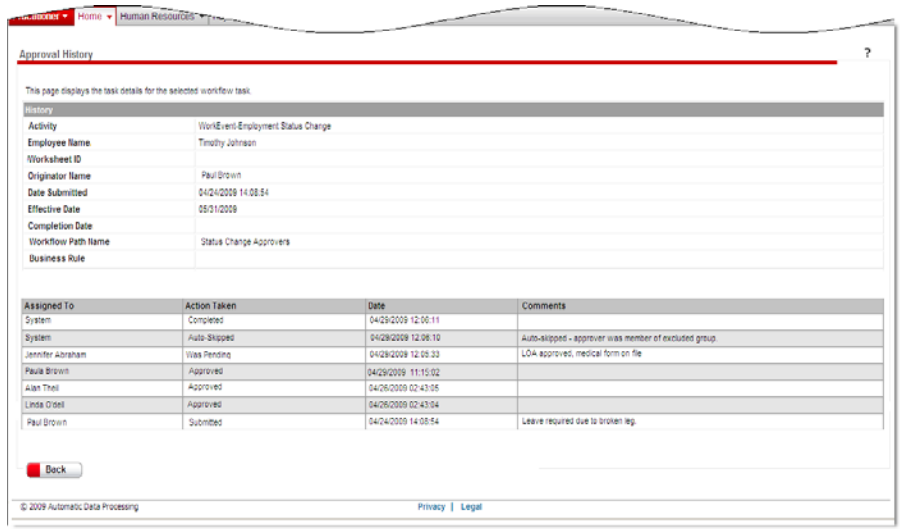
Your events are displayed here.



2 To view a summary of changes for an event, click the activity name.

3 To view details of each step in the event's workflow path, click (**View History**) to the right of the activity (event).

Result: A summary of the event is provided at the top of the page, followed by a list of actions performed by all users and the system.



Deleting an Event

You can remove completed events from your approval history. Completed events include any event that is not in progress.

Note: The event remains on the Approval History page of other participants in this event.

---

1 Point to **Home** and select **Approval History**.

2 Click (**Delete**) to the right of the event you want to remove, and then click **OK** to confirm your action.

Recalling an Event

You can recall an event only if you are the submitter of the event and the status of the event is in progress.

1 Point to **Home** and select **Approval History**.

2 Click (**Recall**) to the right of the event you want to recall, and then click **OK** to confirm your action. The status of the event is updated as recalled in the approval history, and the event is removed from the Approval list of the assignees.

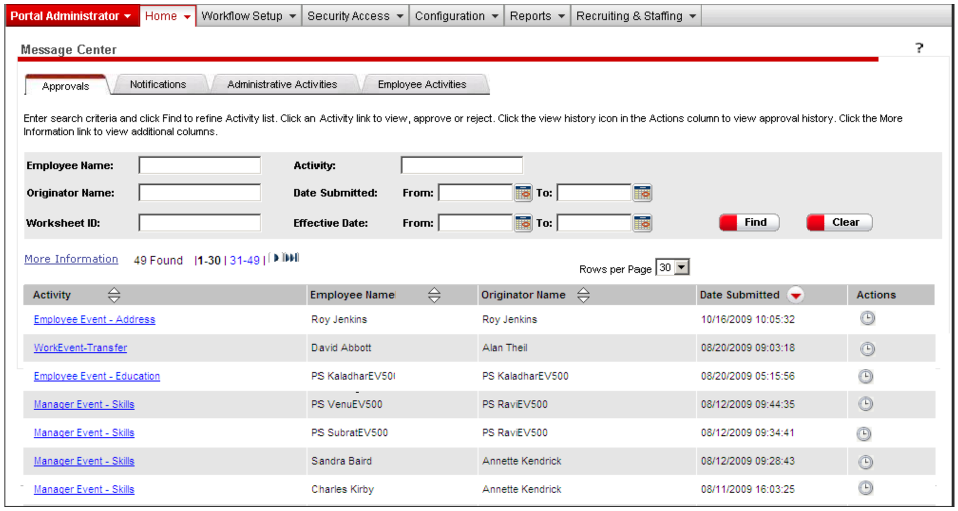
Approving or Rejecting an Event

You can approve or reject an event that you received for approval by doing the following:

1 Point to **Home** and select **Welcome**.

2 In the **Message Center at a Glance** area of the page, click **Approvals**.

3 Approve or reject an event by clicking the activity name.



Note: For more information, click ? (**Help**) in the top-right corner of the page.

Managing Approval History

You can monitor and manage workflow history. You can view a list of all approval history records that are in progress or completed, along with their details. You can also export and purge records to keep your system running efficiently.

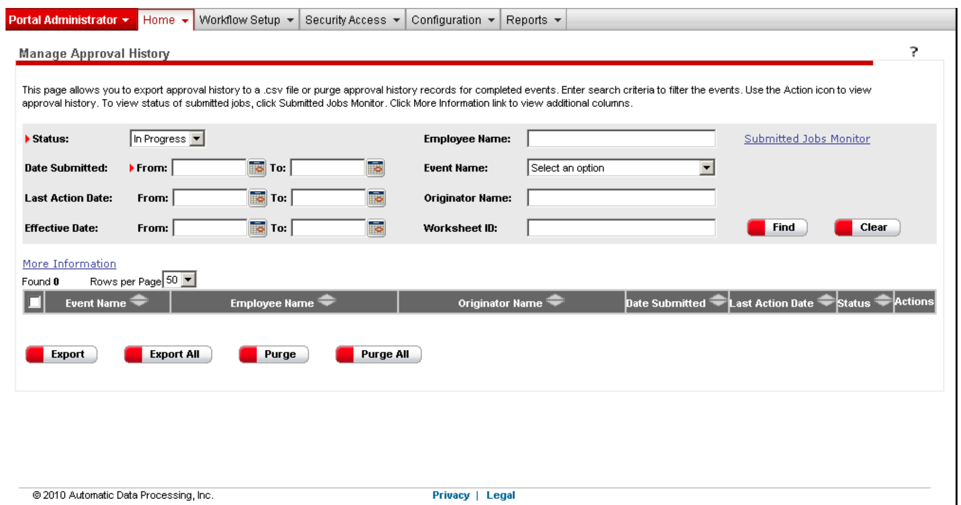
Viewing Events

Events that are in progress include events that have a step awaiting approval.

Completed events include events that have been completed, rejected, recalled, or canceled.

To view all events that are in progress or completed, do the following:

1 Point to **Home** and select **Manage Approval History**.

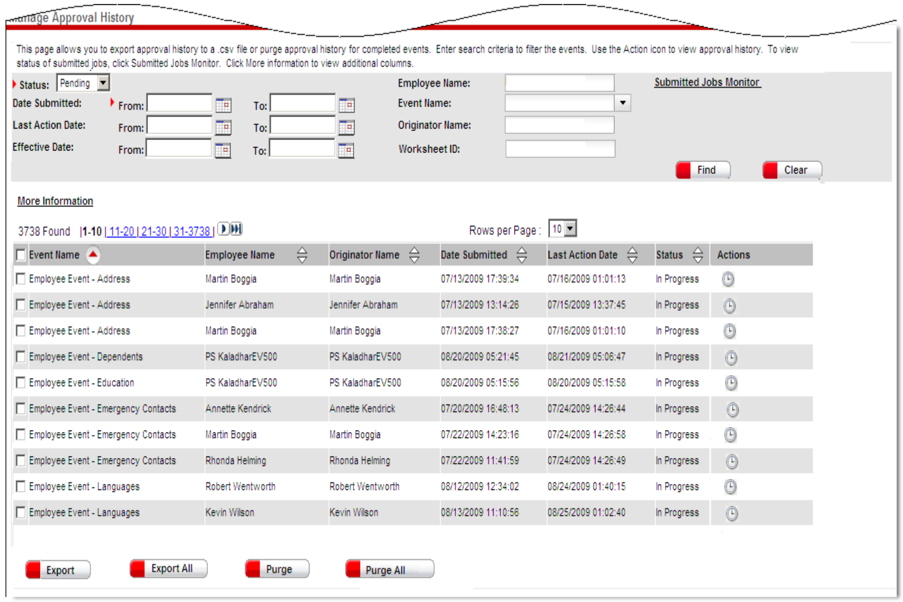


2 In the **Status** field, choose **In Progress** or **Completed**.

3 In the **Date Submitted** field, enter the **From** and **To** dates. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. The maximum date range is 90 days.

Tip: To further refine your list, enter information in other fields. For more information, click ? (**Help**) in the top-right corner of the page.

4 Click **Find**. The results matching your search criteria are displayed.



5 To view details of each step in an event's workflow path, click (**View History**) to the right of the event.

Exporting Approval History

You can export pending or completed approval history to a zipped .csv file for archiving and reporting. If you plan to purge approval history, be sure to export it first so you have a record of it.

1 Point to **Home** and select **Manage Approval History**.

2 In the **Status** field, select **In Progress** or **Completed**.

3 In the **Date Submitted** field, enter the **From** and **To** dates. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. The maximum date range is 90 days.

Tip: To further refine your list, enter information in other fields. For more information, click ? (**Help**) in the top-right corner of the page.

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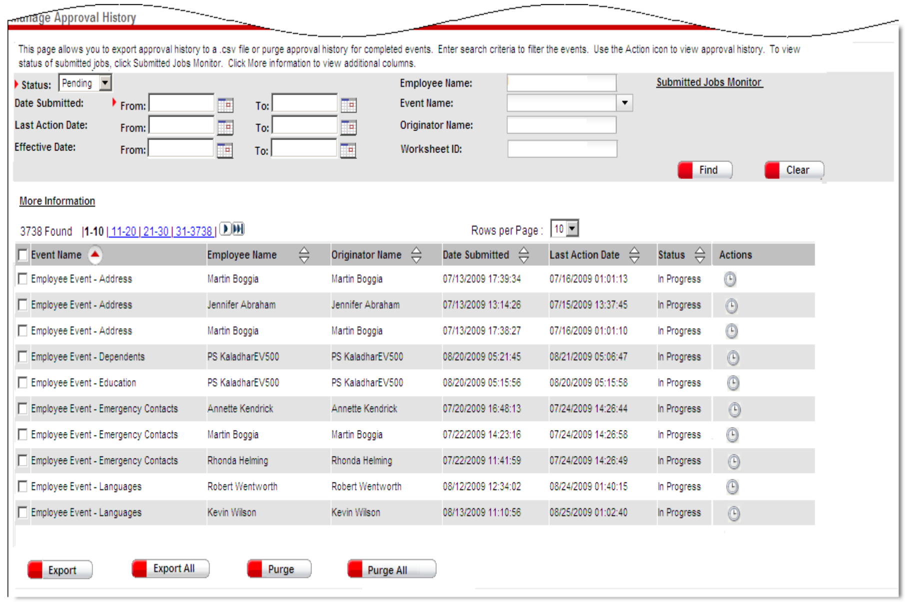
4 Click **Find**. The results matching your search criteria are displayed.

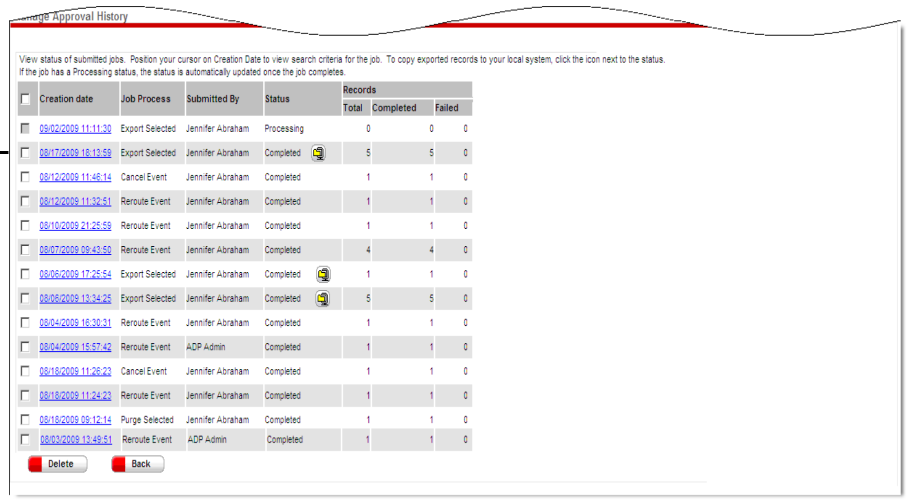


5 Do one of the following:

- To export all history, click **Export All**.
- To export specific history, click to select the check box next to the event name(s) and click **Export**. Do this one page at a time.

Result: The Submitted Jobs Monitor page is displayed with your update. The Submitted Jobs Monitor page lists all export, purge, reroute, and cancel workflow jobs in order of creation, with the most recent first. Jobs include those in progress and completed. If a job has a processing status, that status is updated automatically once the job is completed.

This example shows a recently completed export job.



...age Approval History

View status of submitted jobs. Position your cursor on Creation Date to view search criteria for the job. To copy exported records to your local system, click the icon next to the status.
If the job has a Processing status, the status is automatically updated once the job completes.

Creation date	Job Process	Submitted By	Status	Records Total	Completed	Failed
09/02/2009 11:11:30	Export Selected	Jennifer Abraham	Processing	0	0	0
08/17/2009 18:13:59	Export Selected	Jennifer Abraham	Completed	5	5	0
08/12/2009 11:46:14	Cancel Event	Jennifer Abraham	Completed	1	1	0
08/12/2009 11:32:51	Reroute Event	Jennifer Abraham	Completed	1	1	0
08/10/2009 21:25:59	Reroute Event	Jennifer Abraham	Completed	1	1	0
08/07/2009 09:43:50	Reroute Event	Jennifer Abraham	Completed	4	4	0
08/06/2009 17:25:54	Export Selected	Jennifer Abraham	Completed	1	1	0
08/06/2009 13:34:25	Export Selected	Jennifer Abraham	Completed	5	5	0
08/04/2009 16:30:31	Reroute Event	Jennifer Abraham	Completed	1	1	0
08/04/2009 15:57:42	Reroute Event	ADP Admin	Completed	1	1	0
08/18/2009 11:26:23	Cancel Event	Jennifer Abraham	Completed	1	1	0
08/18/2009 11:24:23	Reroute Event	Jennifer Abraham	Completed	1	1	0
08/18/2009 09:12:14	Purge Selected	Jennifer Abraham	Completed	1	1	0
08/03/2009 13:49:51	Reroute Event	ADP Admin	Completed	1	1	0

Delete Back

6 Wait for the status of your export job to change from processing to completed, then click (**Download File**) to the right of the job.

7 Choose to save the file.

8 Select a filename and destination, and then click **Save**. This returns you to the Submitted Jobs Monitor page. A zipped .csv file is generated in the specified location.

Purging Completed Approval History

You can purge (delete) completed approval history. It is recommended that you export your approval history before purging it. To do so, you conduct a search twice: first to export the approval history and second to purge it.

1 Point to **Home** and select **Manage Approval History**.

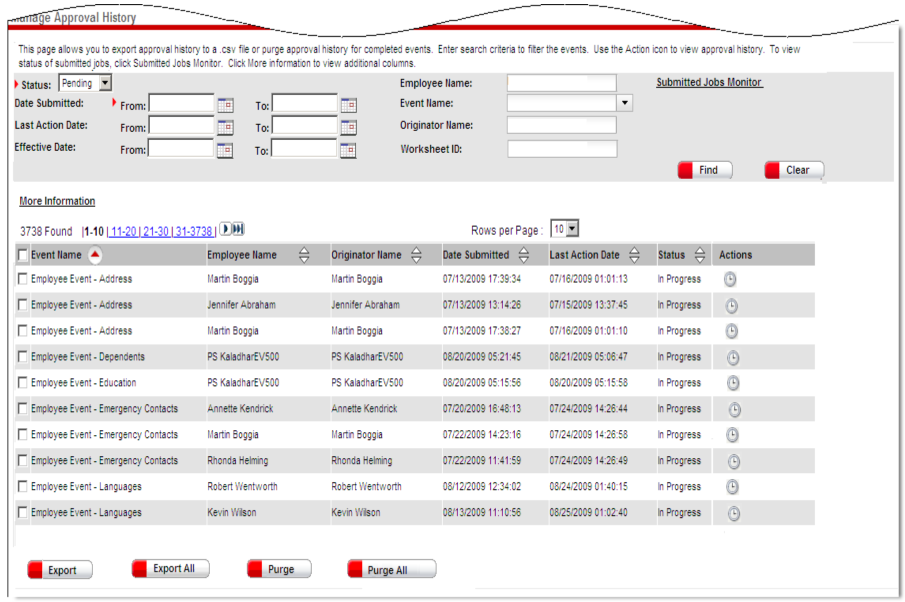
2 In the **Status** field, select **Completed**.

3 In the **Date Submitted** field, enter the **From** and **To** dates. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. The maximum date range is 90 days.

Tip: To further refine your list, enter information in other fields. For more information, click ? (**Help**) in the top-right corner of the page.

---

4 Click **Find**. The results matching your search criteria are displayed.



5 Do one of the following:

- To purge all history, click **Purge All**.
- To purge specific history, click to select the check box next to the event name(s) and click **Purge**. Do this one page at a time.

Result: A confirmation message is displayed.

6 Click **OK** to confirm your action. The Submitted Jobs Monitor page is displayed with your update.

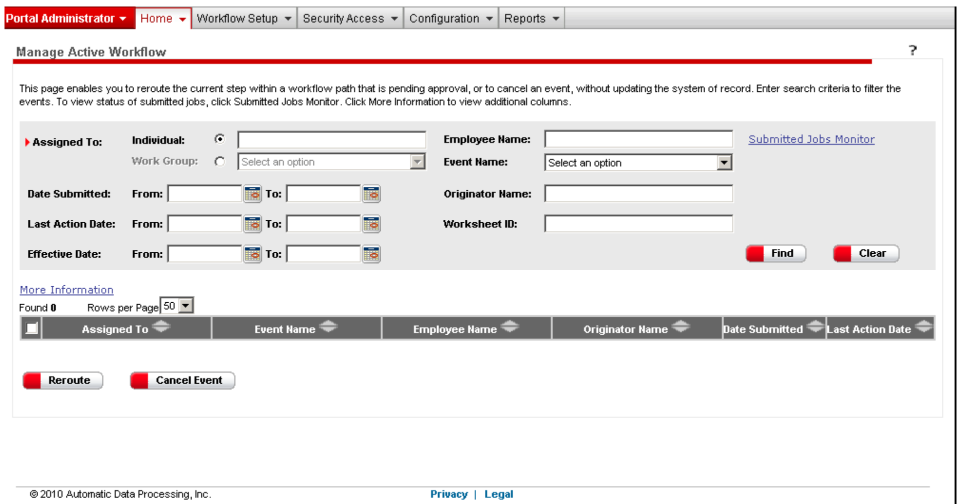
Managing Active Workflow

You can monitor and manage current workflow tasks. You can reroute a step in a workflow path that is pending approval, and you can cancel an event without updates being made to either the HR & Benefits module or the Payroll module. For example, if a manager is out for an extended leave of absence, you can reroute employee events to another manager.

Rerouting a Pending Step

To avoid delays in a workflow path, you can reroute a pending step. You can assign the step to a new approver, or you can choose to skip the step.

1 Point to **Home** and select **Manage Active Workflow**.

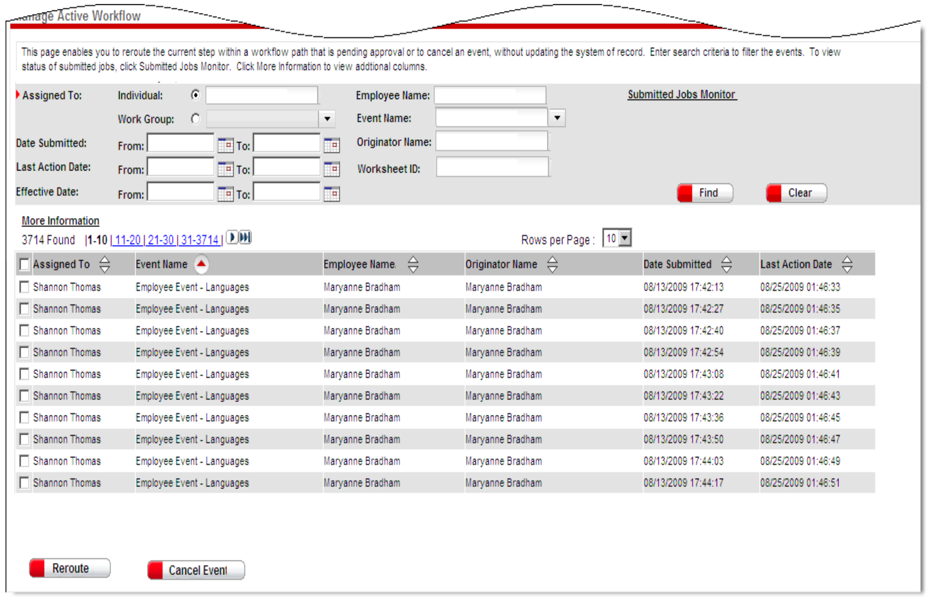


2 Find the individual or work group to where the step was originally assigned.

To Find	Select
An individual approver	**Individual** in the **Assigned To** field. In the **Individual** field, enter the approver's name. If you do not specify the individual, all individuals are displayed in your results.
A specific work group	**Work Group** in the **Assigned To** field. In the **Work Group** field, click the down arrow to select the work group from the list. If you do not specify the work group, all work groups are displayed in your results.

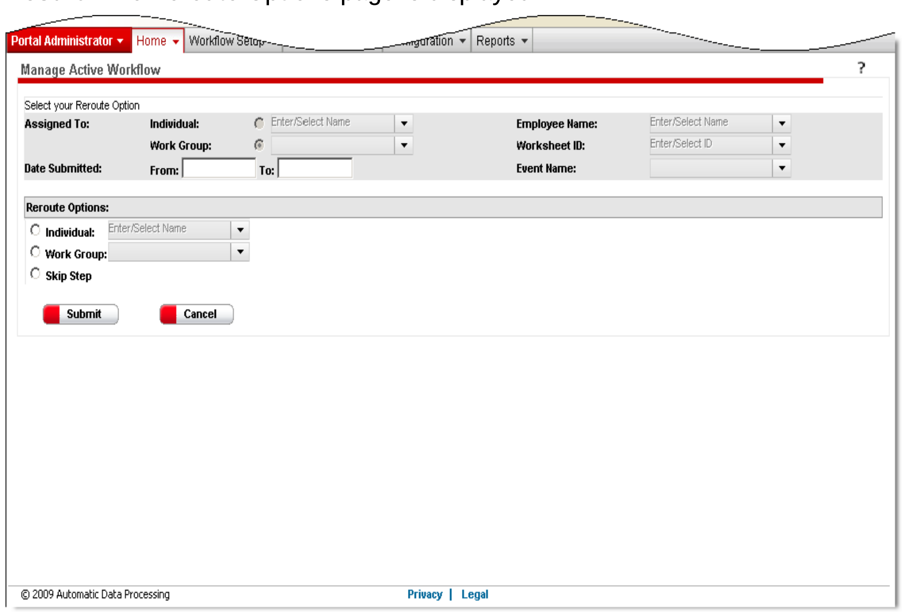
Tip: To further refine your list, enter information in other fields. For more information, click ? (**Help**) in the top-right corner of the page.

3 Click **Find**. The results matching your search criteria are displayed.



4 Click to select the check box next to the step(s) you want to reroute and click **Reroute**. Do this one page at a time.

Result: The Reroute Options page is displayed.



5 Click one of the following reroute options:

- **Individual**. Enter at least three characters in the name, then click the down arrow in the associated field to search for the name. If this new assignee has a manager proxy set, that proxy is not used.
- **Work Group**. Click the down arrow in the associated field to search for the name.
- **Skip Step**. Choose this option if you want the pending step to be ignored in the workflow path. If this step is the last one in the path, the event is completed.

Tip: For more help, click ? (**Help**) in the top-right corner of the page.

6 Click **Submit**.

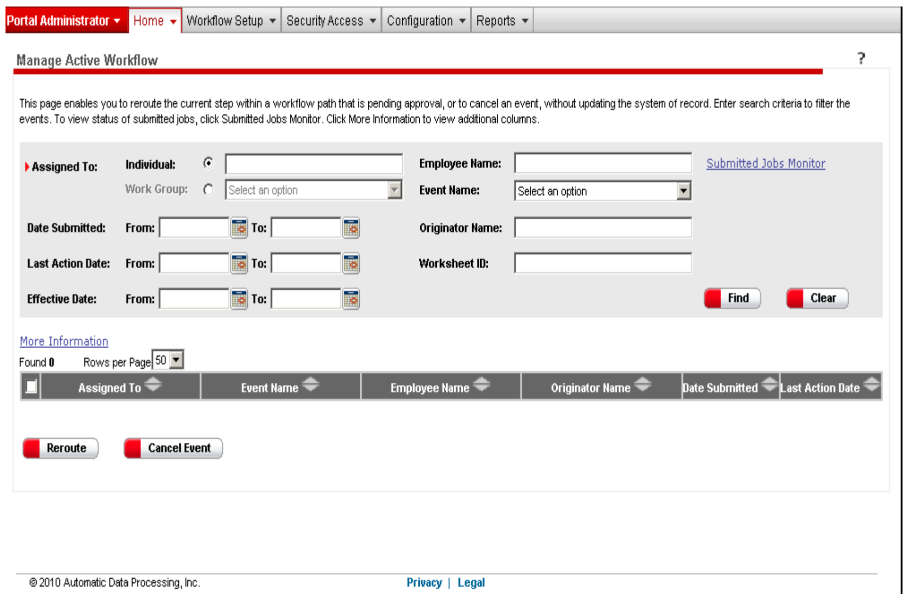
Result: The Submitted Jobs Monitor page is displayed with your update.

Note: A rerouted step that is not addressed can be reassigned to a proxy. For more information, click ? (**Help**) in the top-right corner of the page.

Canceling an Event

You can cancel an event that has a pending step in the workflow path.

1 Point to **Home** and select **Manage Active Workflow**.

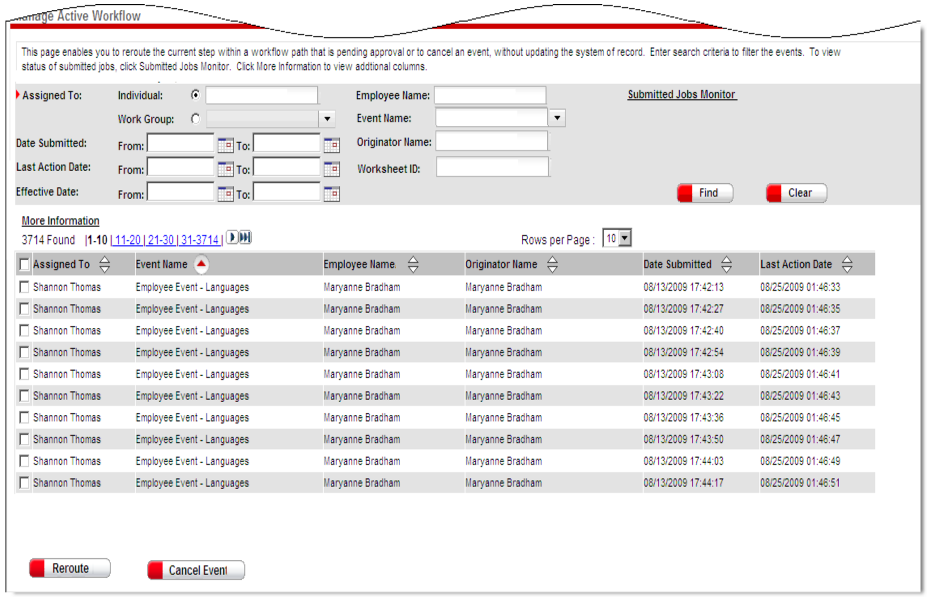


2 Find the individual or work group to where the step was originally assigned.

To Find	Select
An individual approver	**Individual** in the **Assigned To** field. In the **Individual** field, enter the approver's name. If you do not specify the individual, all individuals are displayed in your results.
A specific work group	**Work Group** in the **Assigned To** field. In the **Work Group** field, click the down arrow to select the work group from the list. If you do not specify the work group, all work groups are displayed in your results.

Tip: To further refine your list, enter information in other fields. For more information, click ? (**Help**) in the top-right corner of the page.

3 Click **Find**. The results matching your search criteria are displayed.



4 Click to select the check box next to the event(s) you want to cancel and click **Cancel Event**. Do this one page at a time.

Important: Performance events must be rejected by an approver rather than canceled. If you include these events in your selection, your request will not process.

Result: A confirmation message is displayed.

5 Click **OK** to confirm your action.

Result: The Submitted Jobs Monitor page is displayed with your update.

Viewing and Deleting Submitted Jobs

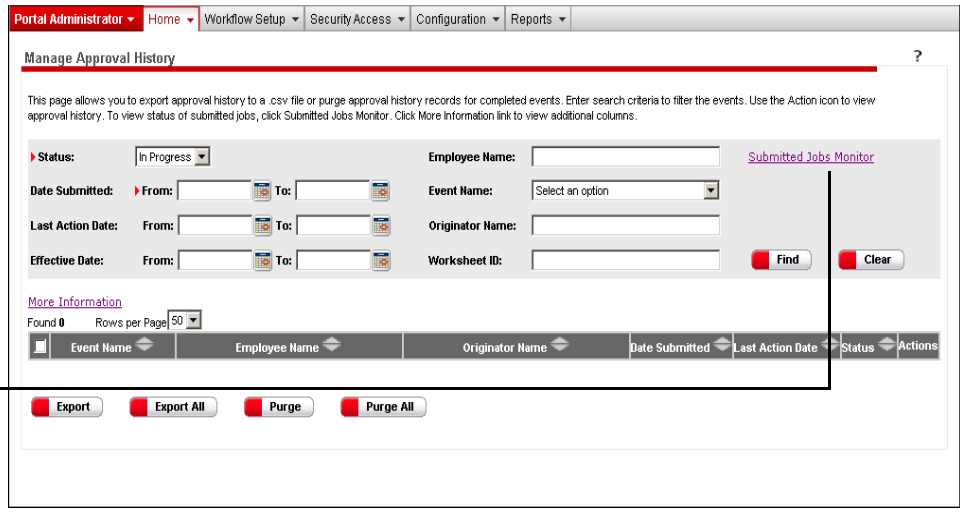
You can view all current and completed export, purge, reroute, and cancel workflow jobs. If you no longer need the records of completed jobs, you can delete them.

Important: Jobs that are 30 days old are automatically deleted.

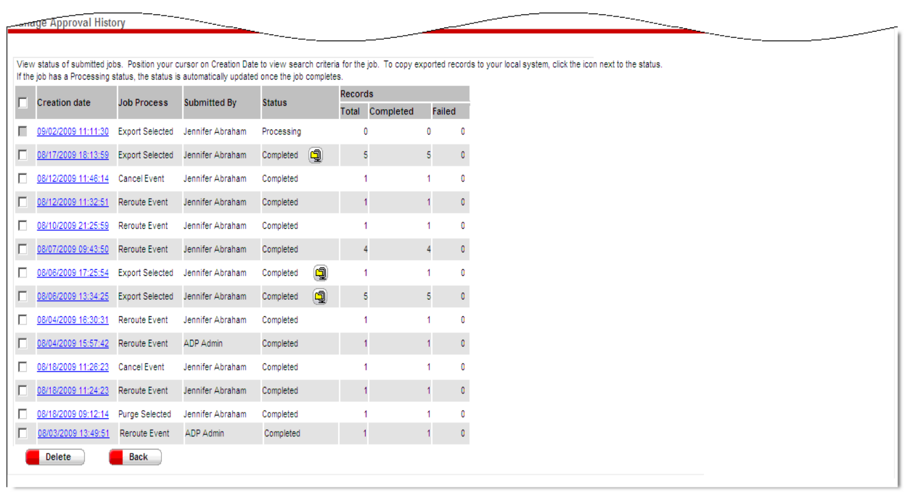
1 Point to **Home** and select **Manage Approval History** or **Manage Active Workflow**.

2 Click **Submitted Jobs Monitor**.

The **Submitted Jobs Monitor** link



3 To delete completed jobs, click to select the check box next to the job you want to delete.



4 Click **Delete**. You are returned to the updated Submitted Jobs Monitor page.

Chapter 3

Managing Your Company Directory

Your company directory provides you and other users with easy access to contact information. Contacts include employees within your organization and non-employees, such as vendors and contractors. Employees who are set up in either the HR & Benefits module or the Payroll module are automatically included in your directory. When you add new employees or change their information in either the HR & Benefits module or the Payroll module, your directory is updated immediately.

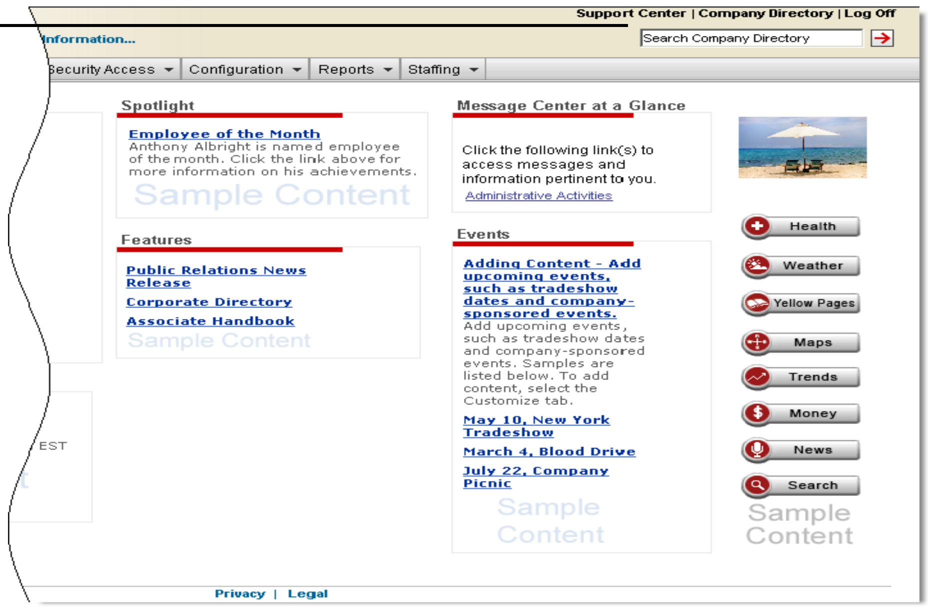
Important: If your company purchased the HR & Benefits module, you may not have a quick search feature and your directory may look and operate differently.

Quick Search

To quickly locate a contact, use the quick search field.

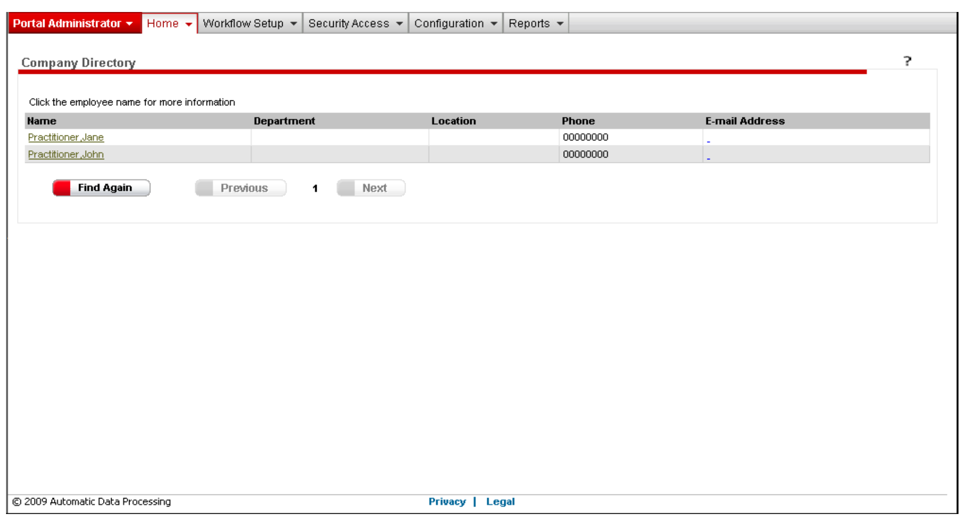
1 At the top right of any page, in the **Search Company Directory** field, enter a last name, first name, or partial last name, and click the arrow to the right of the field.

Quick search field



2 If more than one contact meets your search criteria, a list displays.

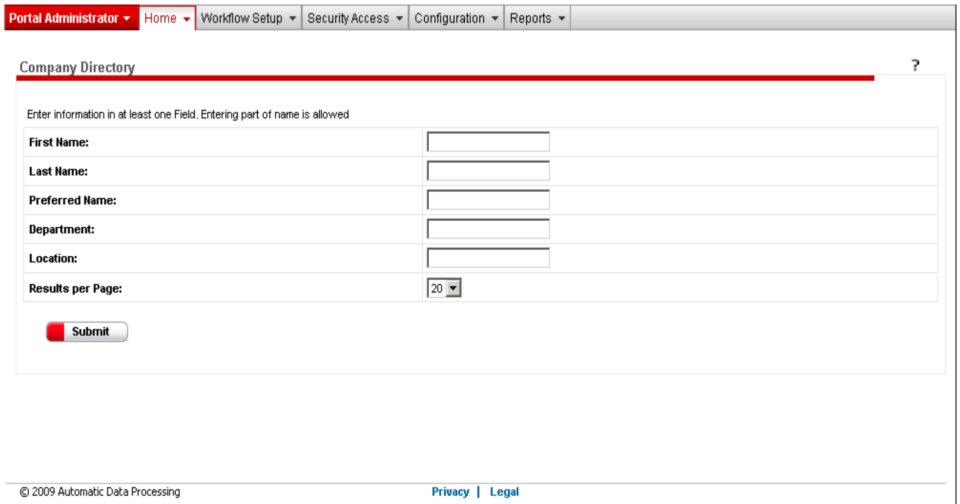
Click the contact name you want.



Advanced Search

To search for a contact using additional criteria, do the following:

1 At the top right of any page, click **Company Directory**, or point to **Home** and select **Company Directory**.



2 Search for a contact. You can enter the full or partial first name, last name, or preferred name. You can also enter the department or location. You must enter information in at least one field.

3 If necessary, select how many results you want displayed per page.

4 Click **Submit**.

Working with Individual Contacts

In ADP Workforce Now, you can add or remove contacts from your directory as needed. There are two ways to manage your directory:

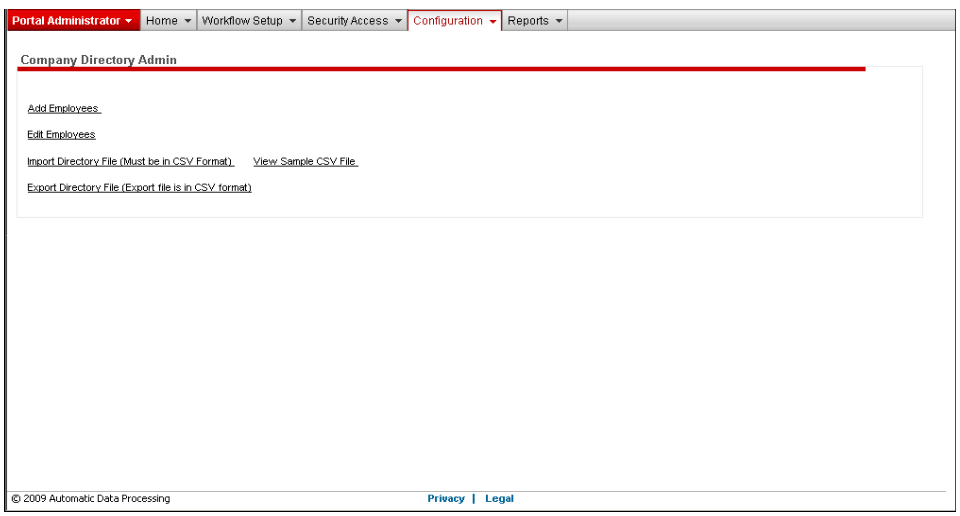
- **Individually** - You can add or remove individual contacts to your directory as needed.
- **Import a file** - You can upload a .csv file containing several contacts. (See “Importing a Directory File” on page 84.)

Important: If you add a contact to your directory, but this person has already been entered in either the HR & Benefits module or the Payroll module, a second entry for this person will be created in the company directory. What you enter in the company directory does not update what has been entered in either the HR & Benefits module or the Payroll module. For more information, refer to “Using the Company Directory for Employees within Your Organization” on page 80.

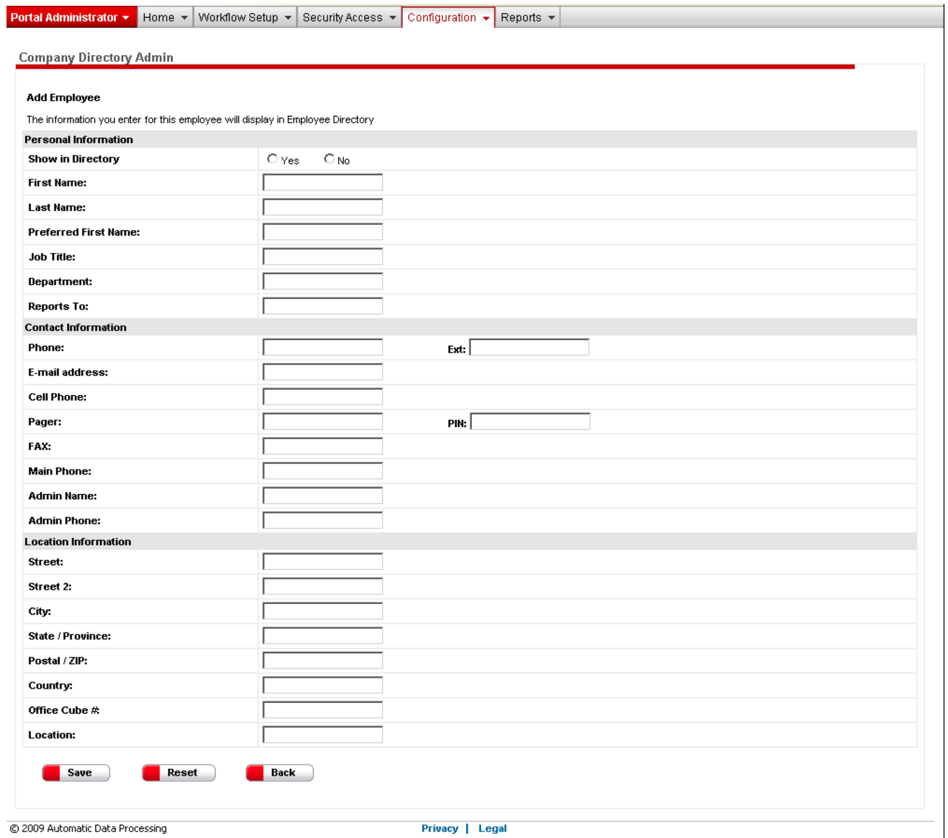
Adding a Contact to Your Directory

1 Point to **Configuration** and select **Company Directory**.

2 Click **Add Employees**.



3 Enter the appropriate information. You must make a selection in the **Show in Directory** field and enter information in the **First Name**, **Last Name**, and **Phone** (business phone) fields.



4 Click **Save**, and then click **OK** to confirm your action.

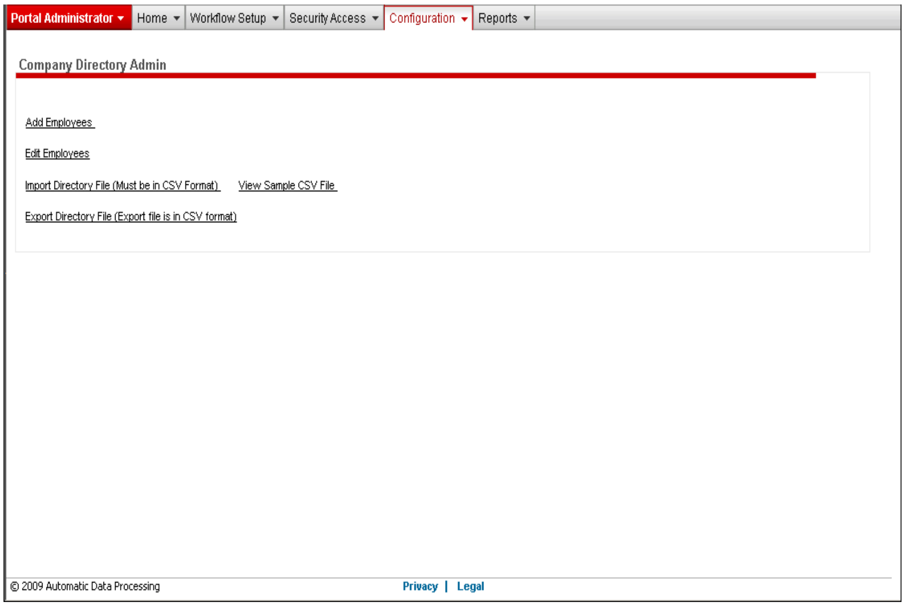
Editing a Contact in Your Directory

You can update information for a contact who was added individually or in a .csv file.

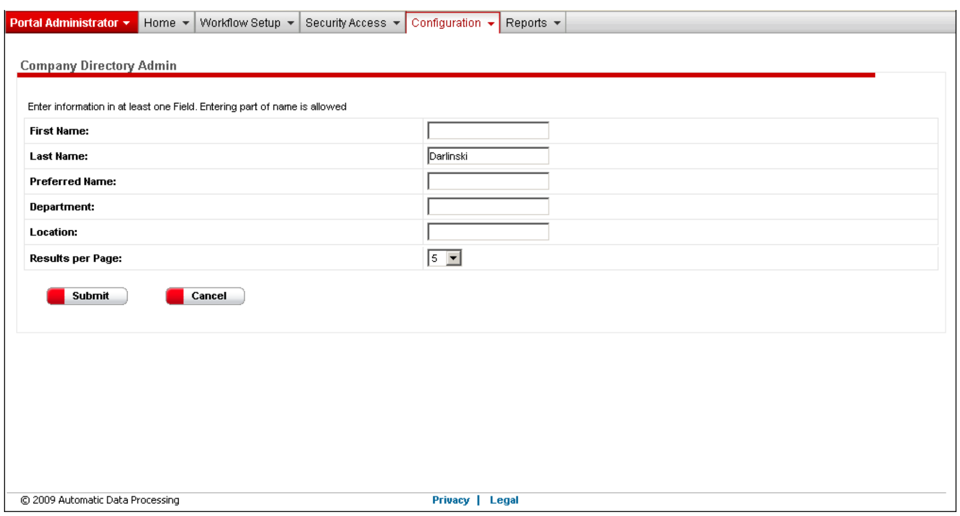
Important: If an employee's data is in either the HR & Benefits module or the Payroll module, you or your payroll practitioner needs to update the data in either the HR & Benefits module or the Payroll module so that changes are applied appropriately. Changes that you make in your company directory will not display in either your HR & Benefits module or your Payroll module. For more information, refer to "Using the Company Directory for Employees within Your Organization" on page 80.

1 Point to **Configuration** and select **Company Directory**.

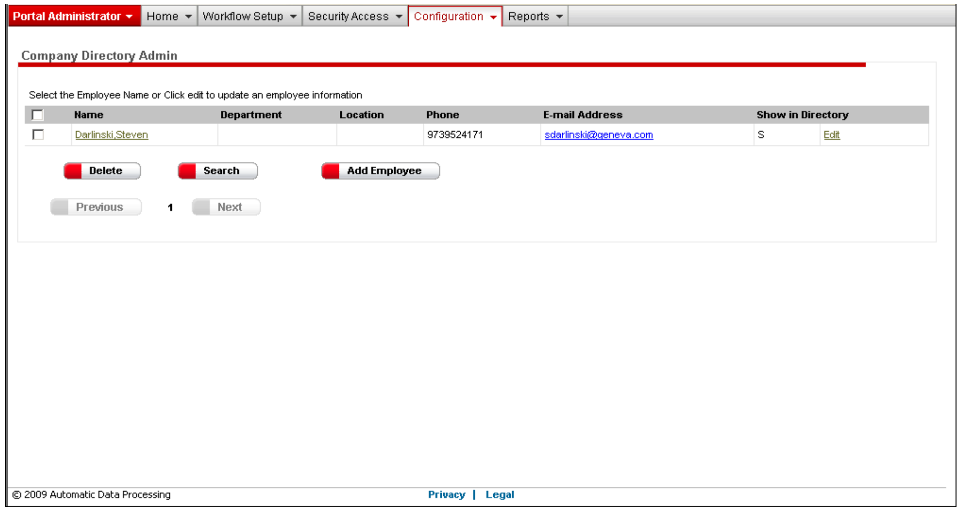
2 Click **Edit Employees**.



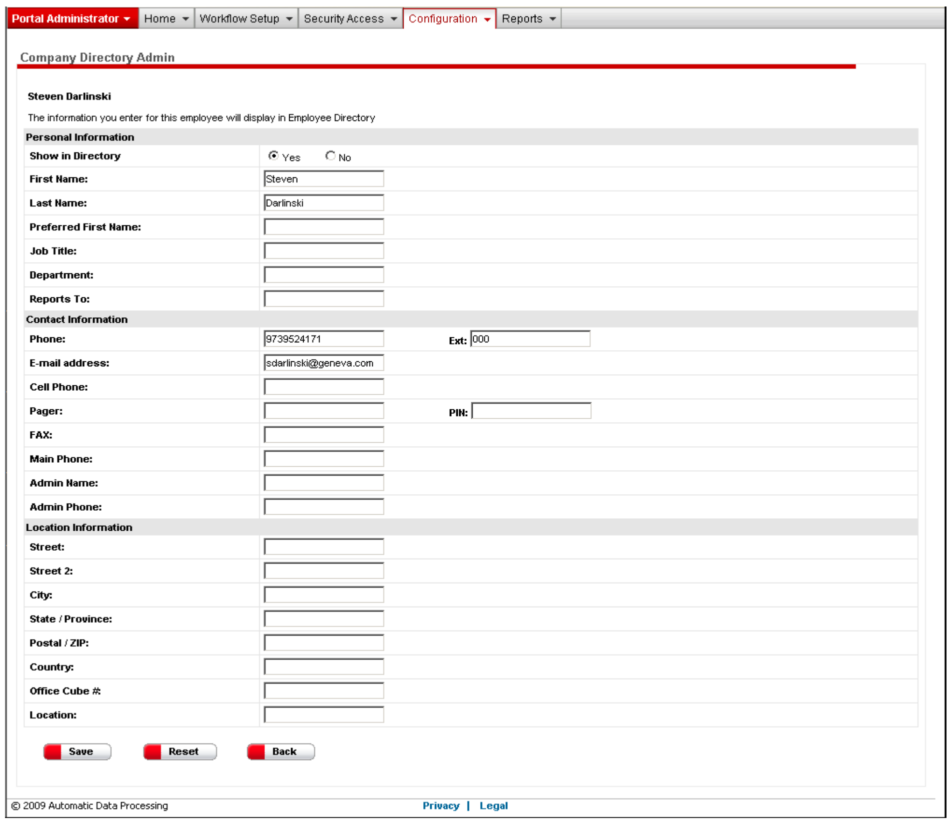
3 Locate the contact by entering information in one or more fields and clicking **Submit**.



4 In the **Show in Directory** column, click **Edit**.



5 Make your changes.



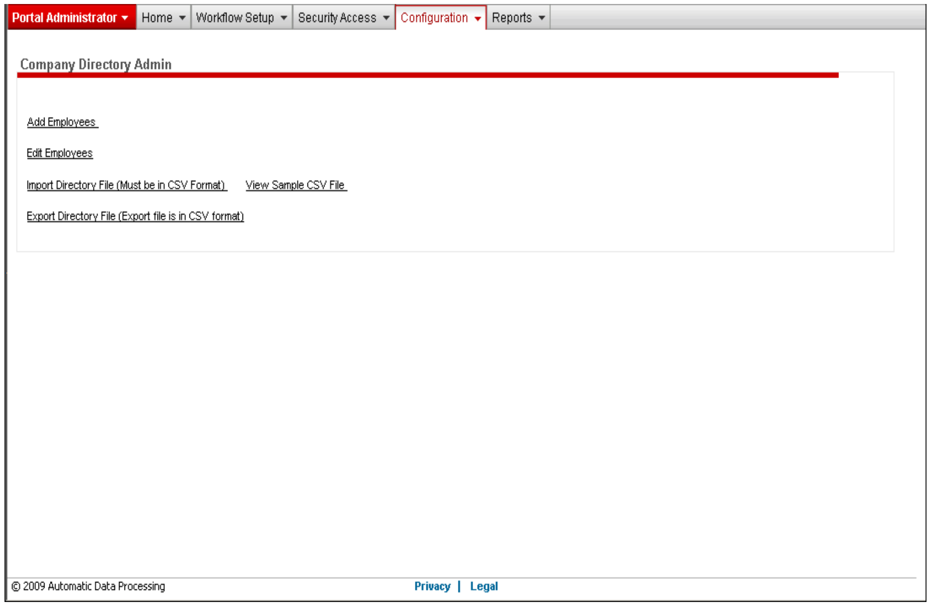
6 When you are done, click **Save**, and then click **OK**.

Deleting a Contact from Your Directory

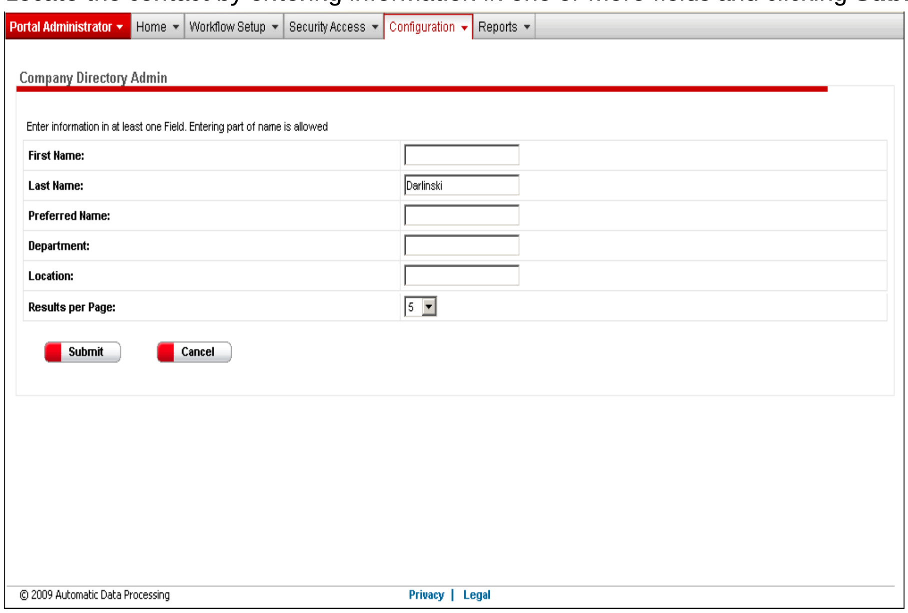
You can delete contacts who were added individually or in a .csv file. For example, you can delete a contract employee who no longer works for the company. When you delete a contact, you are only deleting it from the company directory and not your module.

1 Point to **Configuration** and select **Company Directory**.

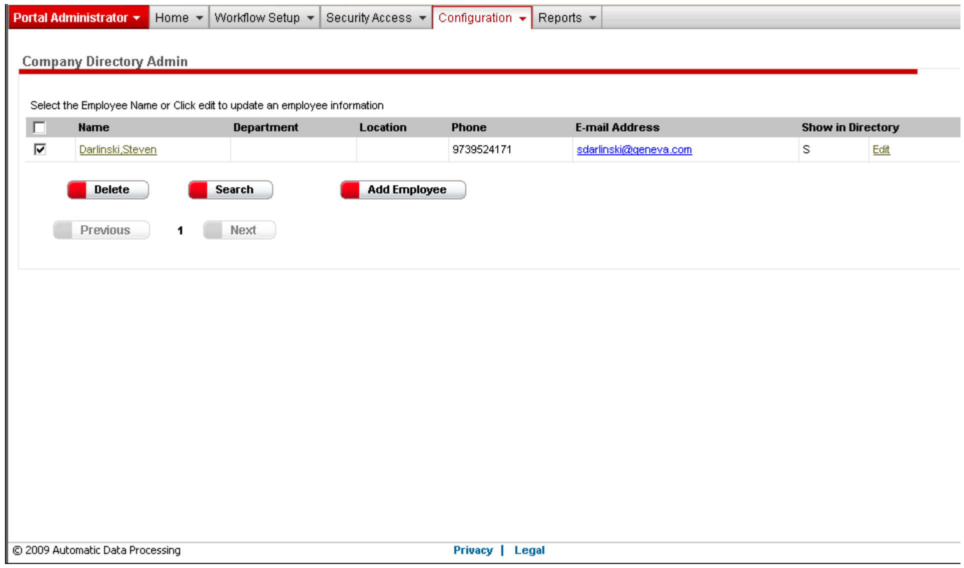
2 Click **Edit Employees**.



3 Locate the contact by entering information in one or more fields and clicking **Submit**.



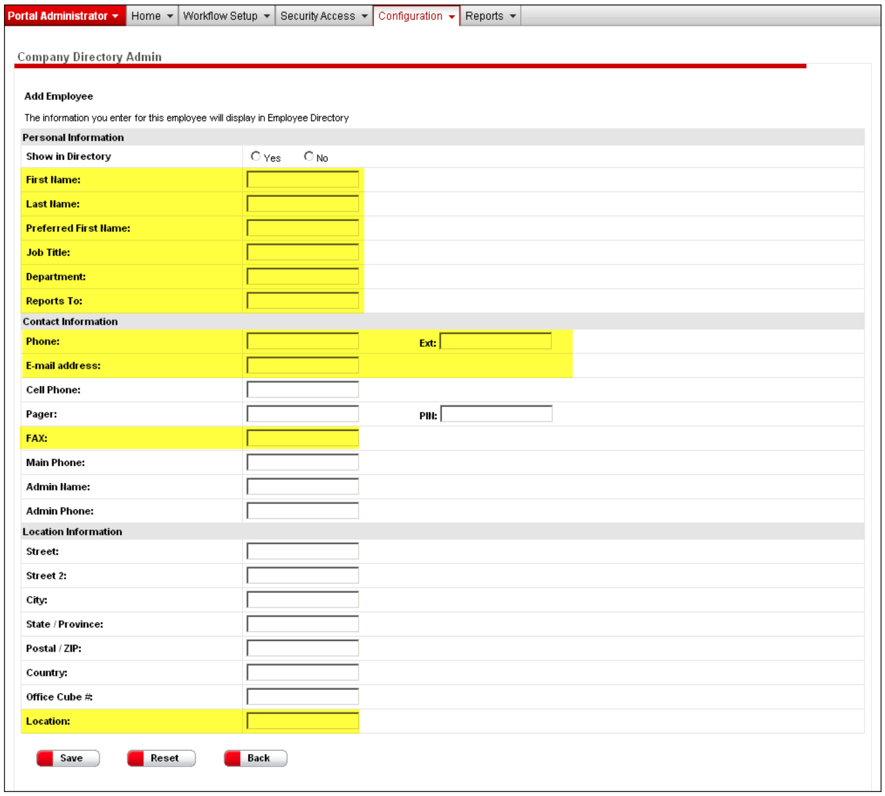
4 Click to select the check box next to the name you want to delete.



5 Click **Delete**, and then click **OK** to confirm your action.

Using the Company Directory for Employees within Your Organization

When you add new employees or change their information in either the HR & Benefits module or the Payroll module, certain fields in the company directory are updated immediately. These fields are highlighted in yellow below.



Important: The information that you enter in the company directory does not update what has been entered in either the HR & Benefits module or the Payroll module.

Where you enter and change the employee information that gets displayed in the company directory depends on the combination of modules your company is using. Refer to the next section for details.

Where to Enter and Change Employee Information

Below, locate the combination of modules your company is using. Next to this combination, refer to the table that is listed.

If You Have	Use
Payroll module, HR & Benefits module, and Time & Attendance module	Table 1, HR & Benefits Module
Payroll module and HR & Benefits module	Table 1, HR & Benefits Module
Payroll module and Time & Attendance module	Table 2, Payroll Module
Payroll module	Table 2, Payroll Module

Each table lists the company directory fields that are updated immediately when you enter or change employee information in the module. The information next to each company directory field tells you how to get to the specific field in the module where this information is entered or changed.

Table 1. HR & Benefits Module

In the HR & Benefits module, you add or change employee information in specific fields on the Employee page. You must be in the Practitioner role.

To get to these fields, point to **HR & Benefits** and select **Employee**. Find the employee. On the Employee page, point to the appropriate tab and click **edit**. Make your edits in the desired field(s).

Company Directory Field	HR & Benefits Page	HR & Benefits Tab	HR & Benefits Field	Notes
First Name	Employee	Personal	First Name	
Last Name	Employee	Personal	Last Name	
Preferred First Name	Employee	Personal	Preferred Name	
Job Title	Employee	Work	Job Title	To make edits in this field, enter a change date, and then click Change Job.
Department	Employee	Work	Home Department	To make edits in this field, enter a change date, and then click Change Groups.
Reports To	Employee	Reports To	This employee is currently managed by	To make edits in this field, enter a change date, and then click Change Manager.
Phone	Employee	Work	Work Phone	
email address	Employee	Work	Work email	
Fax	Employee	Work	Work Fax	
Location	Employee	Work	Location	To make edits in this field, enter a change date, and then click Change Groups.

Table 2. Payroll Module

In the Payroll module, you add or change employee information in specific fields on the Employee page. You must be in the Practitioner role.

To get to these fields, point to **Payroll** and select **Employee**. Find the employee. In the **Employee Information** area, click the appropriate link. Locate the area of the page you need, and then make your edits in the desired field(s).

Company Directory field	Payroll page	Payroll link	Area of Payroll page	Payroll Field	Notes
First Name	Employee	Personal	Personal Information	First Name	
Last Name	Employee	Personal	Personal Information	Last Name	
Preferred First Name	Employee	Personal	Personal Information	Preferred Name	
Job Title	Employee	Position	Position tab	Job Title	
Department	Employee	Position	Position tab	Home Department	
Reports To	Employee	Position	Position tab	Reports To	To make edits in this field, click View/Change Reports.
Phone	Employee	Personal	Personal Information	Work Phone	Separate Payroll fields are provided for the national prefix, area code, dial number, and ext/PIN.
email address	Employee	Personal	Personal Information	Work email	
Fax	N/A				If needed, you can enter a fax number in the company directory.
Location	Employee	Position	Position tab	Location	

Working with .CSV Files

Instead of adding contacts individually, you can import a large number of contacts to your company directory using a .csv file. Later, you can import another .csv file to either add to files to your directory or replace them.

Creating a .CSV File

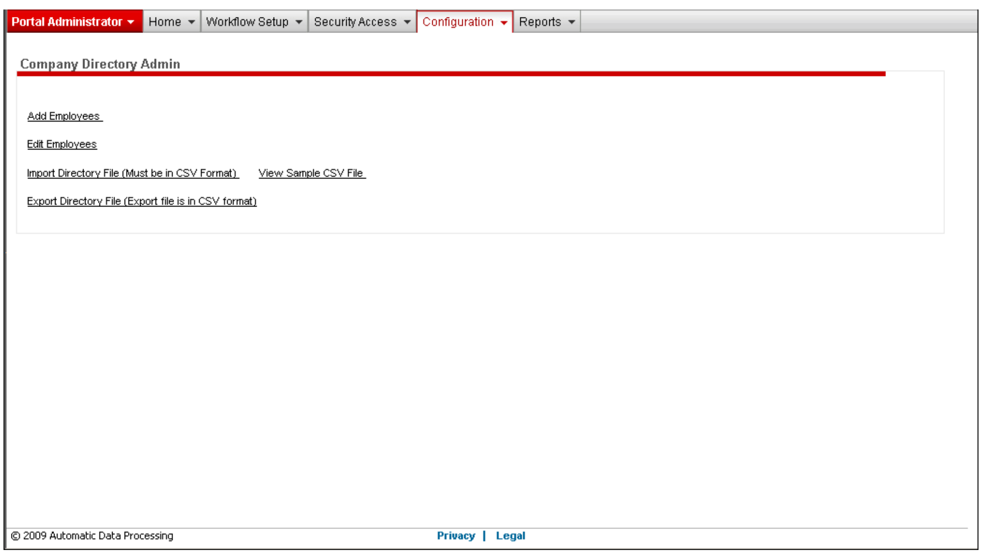
Before you can import your contacts, you must create a .csv file that contains your contact information. To import this file successfully, follow these guidelines:

1. Do not change the order of the 24 columns that are in the import file.
2. For each contact, enter information in the **First Name**, **Last Name**, and **Phone Number** (business phone number) columns. This information is required.
3. Enter “null” without the quotation marks in other areas for which you have no information. You cannot leave any fields blank in the import file.
4. Delete the header in the file. You can use this header to create the .csv file, but you will not be able to import the file if you do not remove it.
5. Save the file with a .csv extension to a directory on your C drive.

Tip: A sample .csv file is available in ADP Workforce Now. Point to **Configuration** and select **Company Directory**. Click **View Sample CSV File**.

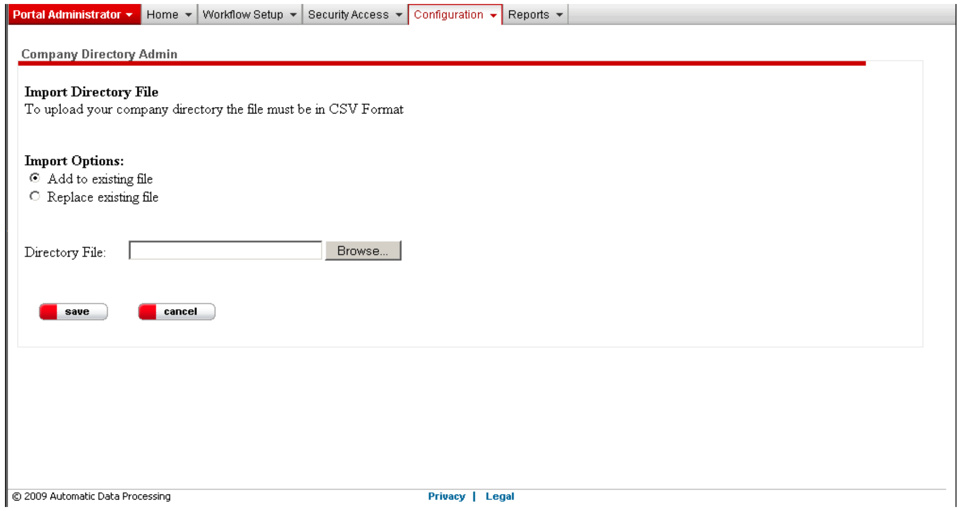
Importing a Directory File

1. Point to **Configuration** and select **Company Directory**.
2. Click **Import Directory File**.



3 Do one of the following:

- To add to your existing company directory file, click **Add to existing file**.
- To replace your existing company directory file, click **Replace existing file**.



4 Click **Browse** to locate the file on your C drive.

5 In the window, select the file, and then click **Open**.

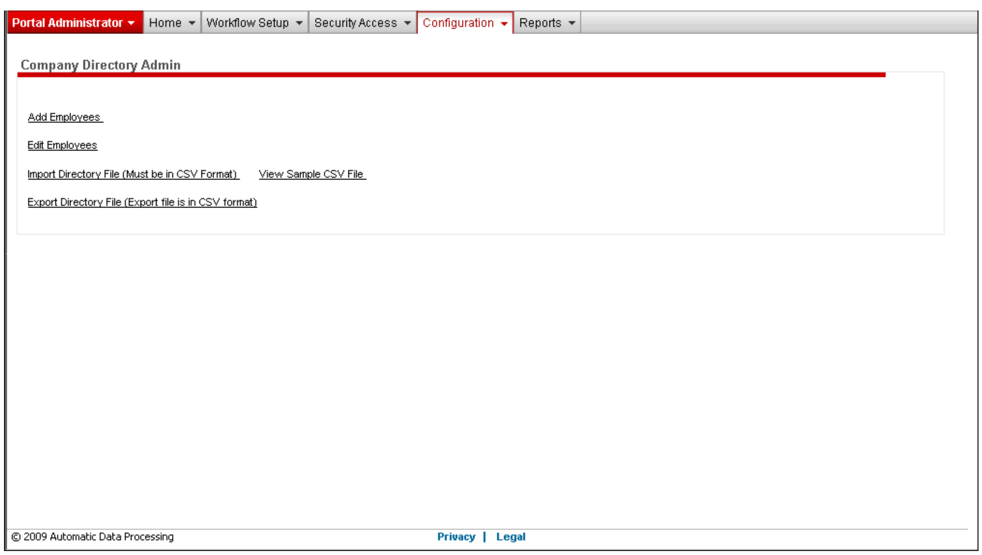
6 Click **Save**.

Exporting Your Directory File

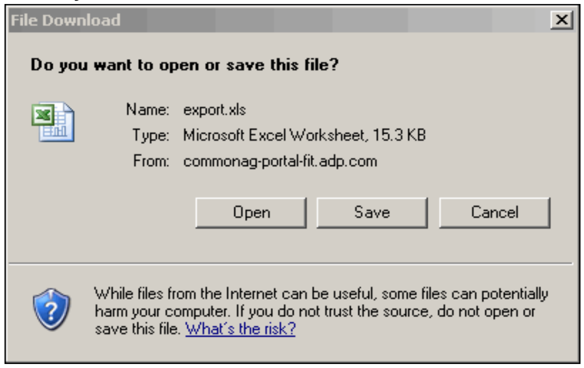
You can export the data in your directory to a .csv file and reformat or change the information using software such as Microsoft® Excel.

1 Point to **Configuration** and select **Company Directory**.

2 Click **Export Directory File**.



3 In the **File Download** window, click **Open** to view the file, or click **Save** to save the file to your local drive.



Chapter 4
Managing Company Policies

As a portal administrator, you can use ADP Workforce Now® to distribute company policies to employees.

Note: The availability of the company policy feature and associated functionality depends on how your company is set up and your permissions for accessing this feature.

You work with your HR practitioner to determine which employees should receive which policy, when they should receive it, and whether or not they need to acknowledge it. When a policy is ready to be distributed, you roll it out. You can also alert employees to the policy by:

- Having a message pop up when they log on to ADP Workforce Now. This message directs them to where they need to go to read or acknowledge the new policy.
- Sending them an email to let them know about the new policy.

This chapter provides instructions about how to set permissions for the company policy feature, and it covers the tasks involved in setting up a company policy and rolling it out to employees.

Setting Company Policy Permissions

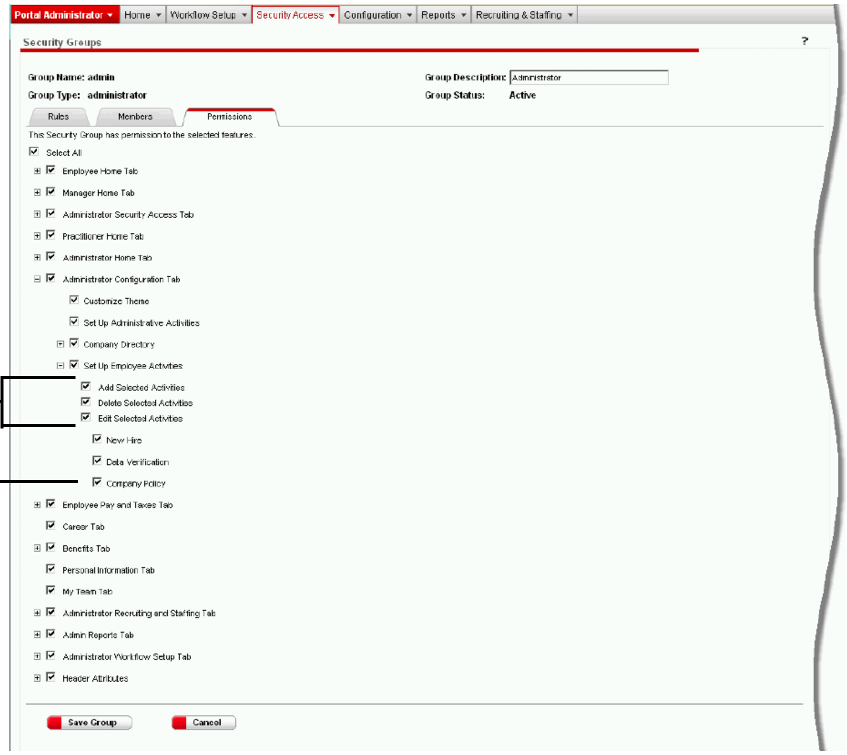
If your company is using the company policy feature, you can set security permissions for portal administrators to specify their access to the feature and to specify how they can work with company policy events.

Set permissions for the company policy feature according to the following instructions:

1. Select **Security Groups** from the **Security Access** menu to access the Security Groups list page.
2. Click the name of the security group for which you want to set company policy permissions.
3. On the Security Group detail page, click the **Permissions** tab.
4. Under the **Administrator Configuration Tab ~ Set Up Employee Activities**, you can click to select or clear the **Company Policy** check box, and you can click to select or clear permissions to add, edit, or delete company policy events.
   - If you want members of a security group to have view-only access to company policy events, click to select the **Company Policy** check box, and leave the **Add Selected Activities**, **Edit Selected Activities**, and **Delete Selected Activities** check boxes clear (not selected).
   - If the **Company Policy** check box is cleared for a security group that previously had access to the company policy feature, members of the security group can no longer create new company policy events, but they can access company policy events and reports that were created before the Company Policy activity was turned off, and users can still acknowledge those events.
   - If you click to select the **Add Selected Activities**, **Edit Selected Activities**, or **Delete Selected Activities** check box, you must select the **Company Policy** event type.

Add, Delete, and **Edit Selected Activities** check boxes.

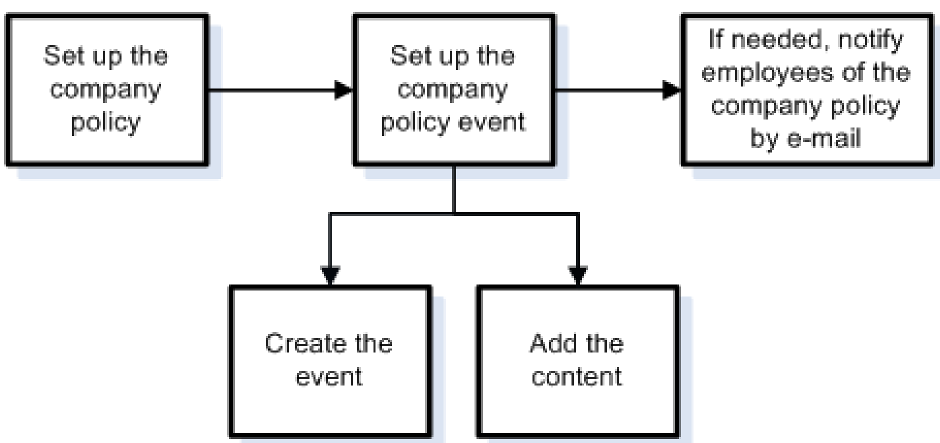
Company Policy check box.



Process for Distributing a New Policy

In order to distribute a new company policy to employees, you have to first set up the policy and then set up a company policy event to roll it out to employees. You can set up as many policies as you want.

The Process



Setting Up a Company Policy

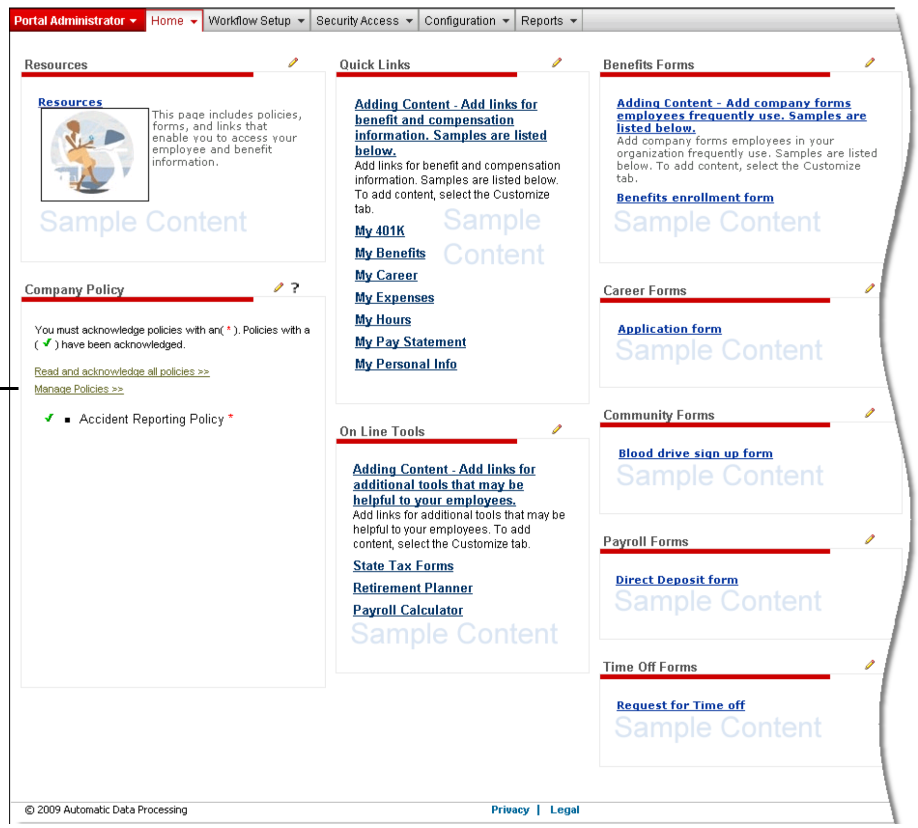
When the content of a company policy is finalized and is ready to be distributed to employees (either as a document file or a link to the policy), you will need to first set it up in ADP Workforce Now. This task can be done by your company's HR practitioner or by you.

Note: Both the portal administrator and the practitioner can set up a company policy. Only the portal administrator can set up an event to roll out the company policy to employees.

1 Point to **Home** and select **Resources**.

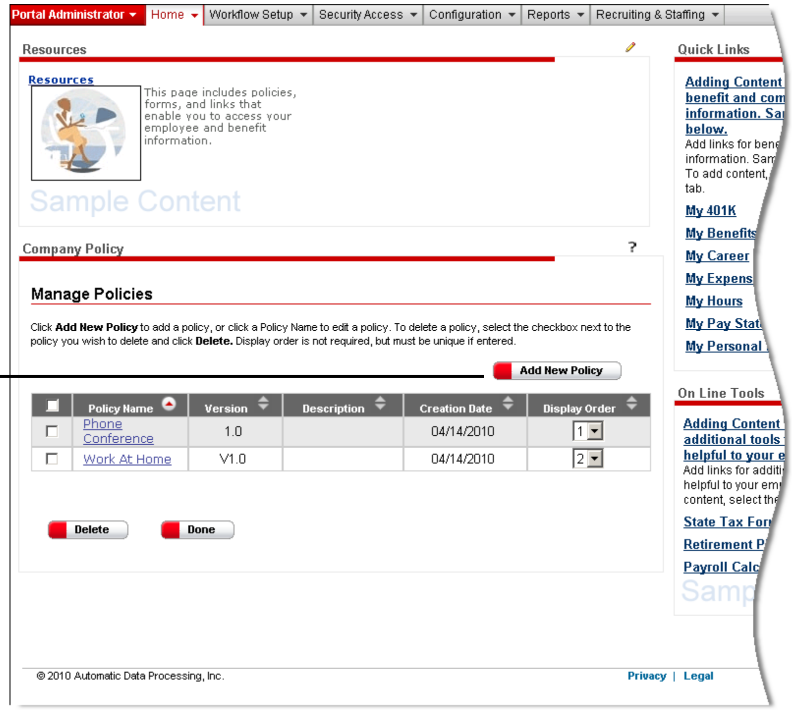
2 In the **Company Policy** area, click **Manage Policies**.

Manage Policies link



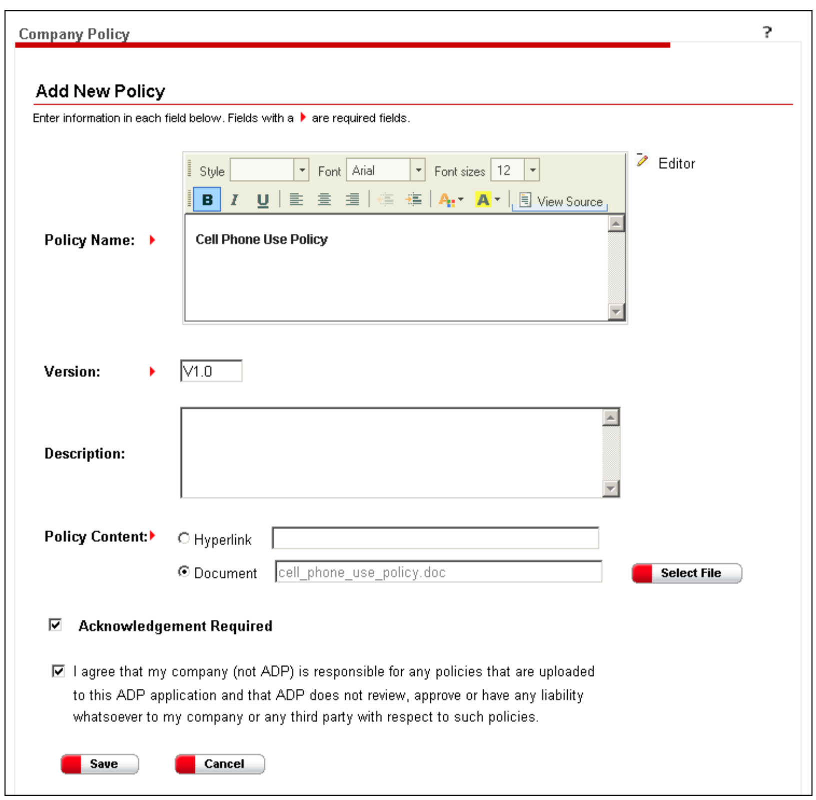
3 Click **Add New Policy**.

Click here.



4 In the **Policy Name** field, enter the name of the policy. You can include letters, numbers, and special characters. You can also change the appearance of the policy name by using the Editor toolbars that display.

In this example, a cell phone policy is added.



5 In the **Version** field, enter a version number. You can include letters, numbers, and special characters.

6 If needed, enter a description in the **Description** field.

7 Add the company policy by selecting either **Hyperlink** or **Document** in the **Policy Content** field. Then do the following.

If You Select	Then
Hyperlink	In the **Hyperlink** field, enter the URL to the policy. **Note:** Test the link before you distribute it to employees. Some external Web sites open at full size and prevent employees from acknowledging the policy.
Document	Click **Select File**, then click **Browse** to find the file. Click **Upload**. Acceptable file formats are .doc, .docx, and pdf.

Note: Not all special characters can be used in the filename during file upload or in the hyperlink URL. See Table 1, Using Special Characters in File Names and URL Addresses for a list of valid and invalid characters.

8 To require that employees acknowledge the policy, click to select the **Acknowledgement Required** check box. You may want to do this for policies that contain sensitive information.

9 Click to select the check box next to the liability agreement. You must accept this agreement in order to save your information.

10 Click **Save**. This returns you to the updated Manage Policies page, where you can sort and view all company policies that have been set up for your company.

11 To control the order that you want the policy to display in the **Company Policy** area of the Resources page, make a selection in the **Display Order** column. If you do not assign a number to the policy, the policy will appear in the order of its creation date.

Change the display order of your company policy here.

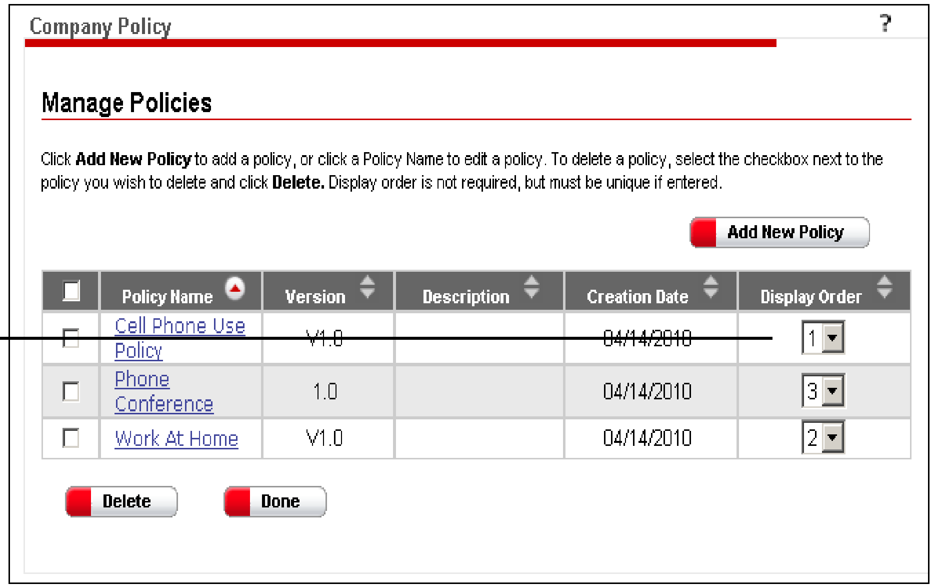


Table 1: Using Special Characters in File Names and URL Addresses

Special Character	Name	File Name	URL Address
	Single Space	Valid	Valid
	Double Space	Valid	Valid
	Triple Space	Valid	Valid
‘	Single Quote	Invalid	Invalid
&	Ampersand	Valid	Valid
#	Pound	Valid	Valid
=	Equal	Valid	Valid
-	Dash	Valid	Valid
_	Underscore	Valid	Valid
(	Left Parenthesis	Valid	Valid
)	Right Parenthesis	Valid	Valid
@	At Sign	Valid	Valid
:	Semicolon	Valid	Valid

Special Character	Name	File Name	URL Address
.	Period	Valid	Valid
+	Plus	Valid	Valid
^	Caret	Valid	Valid
%	Percent	Valid	Valid
$	Dollar	Valid	Valid
{	Left Curly	Valid	Valid
}	Right Curly	Valid	Valid
[	Left Bracket	Valid	Valid
]	Right Bracket	Valid	Valid
,	Comma	Valid	Valid
?	Question	Invalid	Valid
\	Backslash	Invalid	Valid
/	Forward Slash	Invalid	Valid
>	Greater Than	Invalid	Invalid
<	Less Than	Invalid	Invalid
:	Colon	Invalid	Valid
“	Double Quote	Invalid	Invalid
*	Asterisk	Invalid	Invalid
|	Separator	Invalid	Invalid
~	Tilda	Invalid	Valid
`	Tick	Valid	Valid
Ç		Invalid	Invalid
º		Invalid	Invalid
§		Invalid	Invalid
°		Invalid	Invalid
¿		Invalid	Invalid

What to Do Next

In order to roll out the company policy to selected employees, you need to set up a company policy event. (See "Setting Up a Company Policy Event" on page 95.)

Important: You cannot change company policy content after employees have received it. You need to set up a new policy and then roll it out through a new event. Before you set up an event, check to make sure the policy you want to include is ready to be rolled out.

Setting Up a Company Policy Event

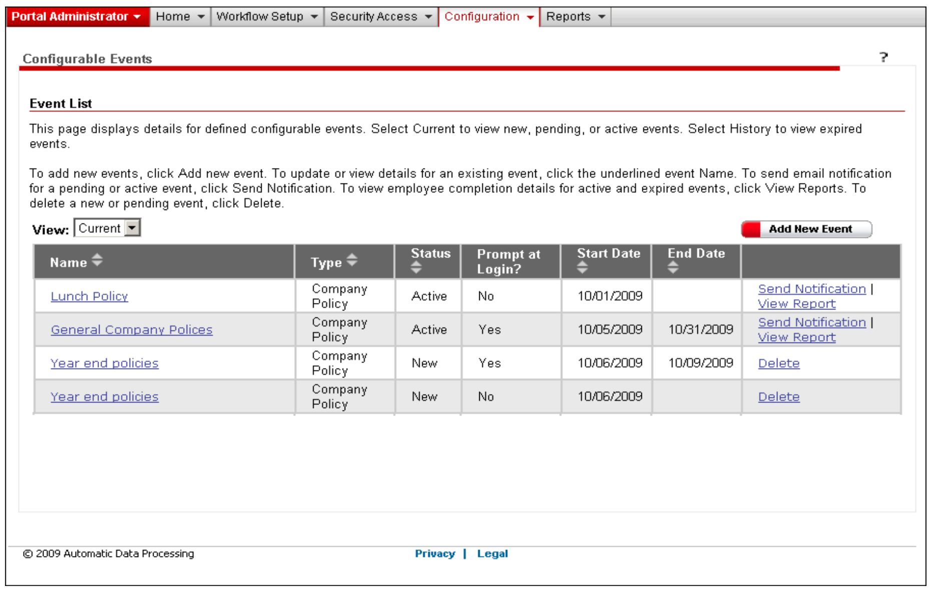
After you have set up a company policy, you are ready to roll it out to employees. You do this by setting up a company policy event. You first create the event, then add the content you want your selected employees to read.

Note: Only the portal administrator can set up a company policy event.

Creating the Event

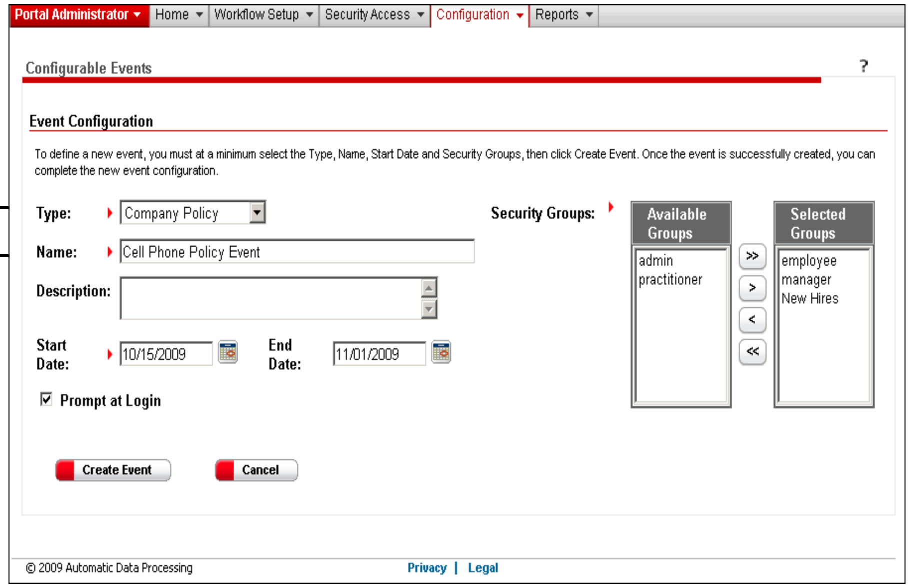
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 Click **Add New Event**.



3 In the **Type** field, select **Company Policy**.

In this example, an event is created for a cell phone policy.



4 In the **Name** field, enter a name for the event.

5 If needed, enter a description in the **Description** field.

6 In the **Start Date** field, enter the start date of the event. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. This is the date on which the event will be available to employees.

Important: If you set up an event using the current date, employees will receive the event immediately. Once the event goes out, you can only change the event end date and the **Prompt at Login** check box. When creating an event, you may want to enter a future start date. Once you confirm that all your event details are correct, you can go back and change the start date to the current date, if needed.

7 If needed, enter an end date in the **End Date** field. You can enter the date manually (mm/dd/yyyy) or select the date from the calendar.

Important: Before an end date is reached, employees can go to their activities list to complete the event, which may include a welcome message, a closing message, and more than one policy. Once an end date is reached, employees can no longer complete the event because it is removed from their activities list. They can still read and acknowledge the policy or policies in the **Company Policy** area of the Resources page, but they will not be able to read a welcome and closing message that may have been included in the event. Their acknowledgement will be recorded in the **Company Policy** area and in the report for the event.

8 In the **Security Groups** area, choose the employee security groups who should complete the event. In the **Available Groups** list, click the security group(s) you want, and then use the arrow keys to move the group(s) into the **Selected Groups** list.

All employees were assigned to security groups when ADP Workforce Now was set up for your company. These groups affect what users can see and do on the site. Your groups include default groups (employee, manager, practitioner, and admin) and custom groups that may have been set up.

Tip: For detailed information on setting up security groups, refer to “Chapter 3: Setting User Access in ADP Workforce Now” in the *ADP Workforce Now® Security Guide*.

9 If you want employees to receive a notification message about this policy when they log on to ADP Workforce Now, click to select the **Prompt at Login** check box. Employees will see this prompt for the first time on the start date you provided. They can choose to complete the event then or receive another message the next time they log on. They will continue to receive the message each time they log on until they complete the event or until the end date for the event, if you provided one, is reached.

10 Click **Create Event**. The Event Configuration page is redisplayed. You can now add the content to your event.

Adding the Content

After you create the company policy event, you need to add the content. You can include three items: a welcome message, the actual company policy, and a closing message. Each item is set up as a separate step in the event. You can include as many policies in an event as you want. You may want to bundle related policies together, or those that need to be acknowledged at important times of the year, such as year-end. The policies you include will be listed on one page, as part of the same step.

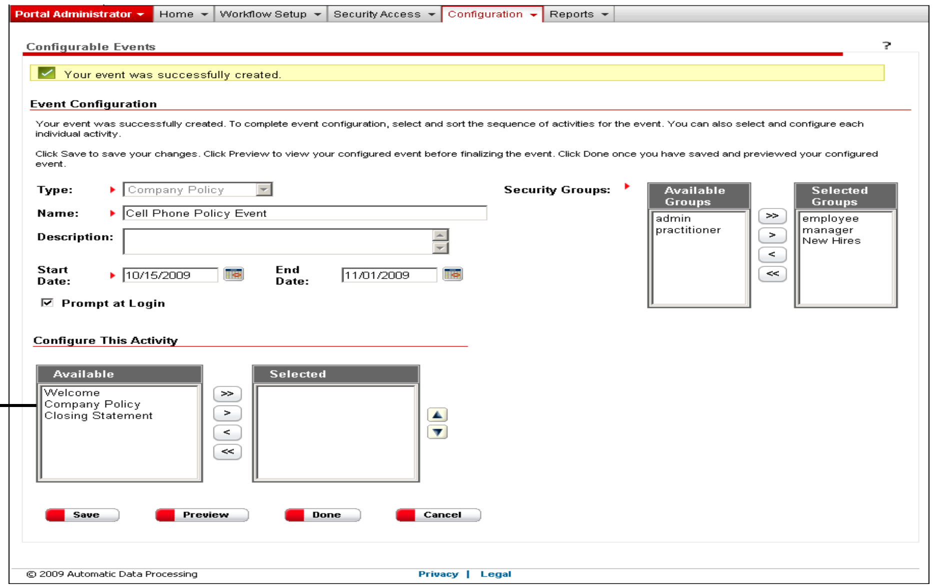
You may want to include a welcome message that lets employees know that they have to acknowledge the policy, and by a specific date. You may also want to send a closing message that provides further instructions to employees.

To add your content, do the following:

1 In the **Available** list in the **Configure This Activity** area, click what you want to include, and then use the arrow keys to move the items into the **Selected** list.

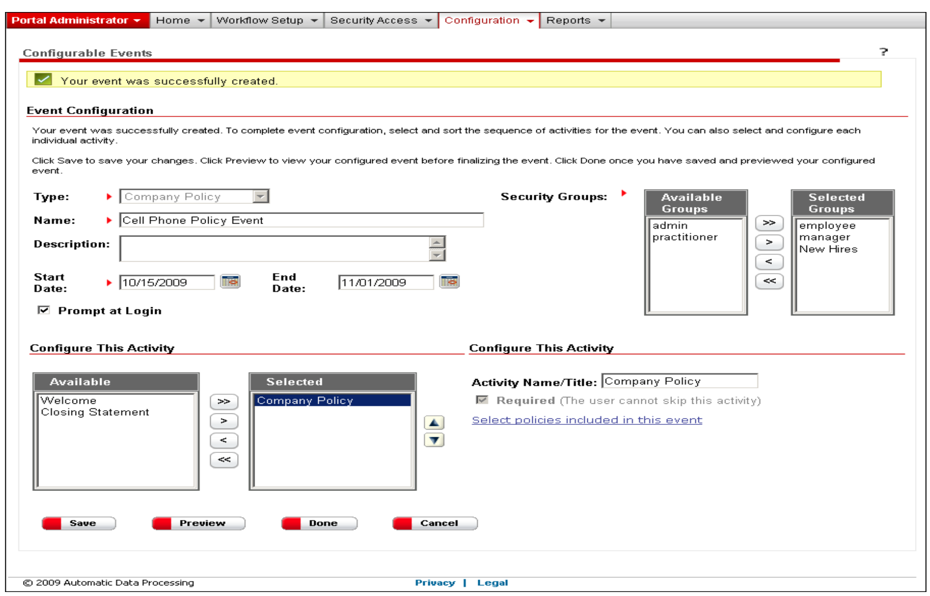
Important: You must select **Company Policy**.

Your available content



The items will be displayed in the order you select them. If you need to change the order, use the up and down arrows to the right of the **Selected** list.

2 In the **Selected** list, click **Company Policy**.

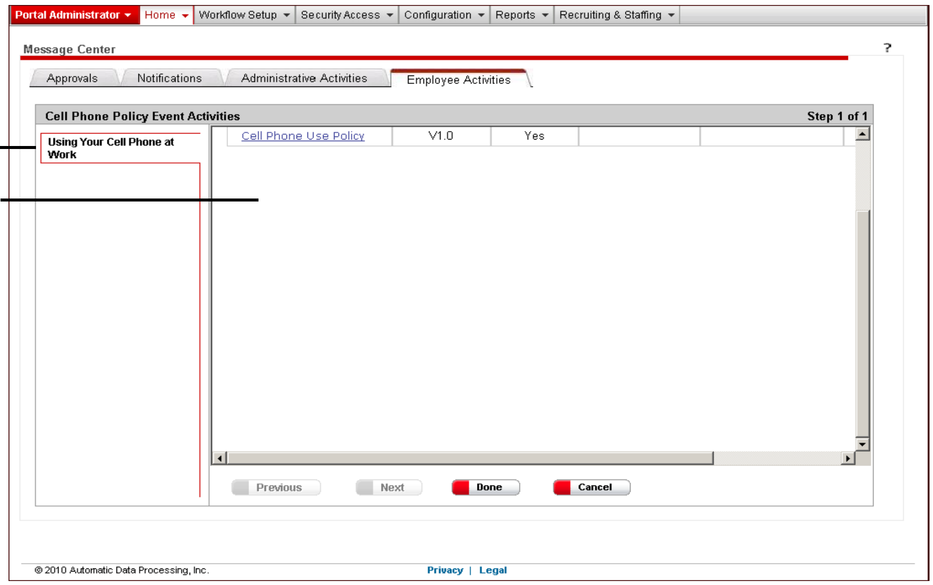


3 To change the title of the step that the employees will see, enter a new name in the **Activity Name/Title** field. The default name is “Company Policy.”

For example, if you are including one cell phone policy, you can enter a name that is more specific, such as “Using Your Cell Phone at Work.” The following screen shot shows what the employees will see when they open their company policy event.

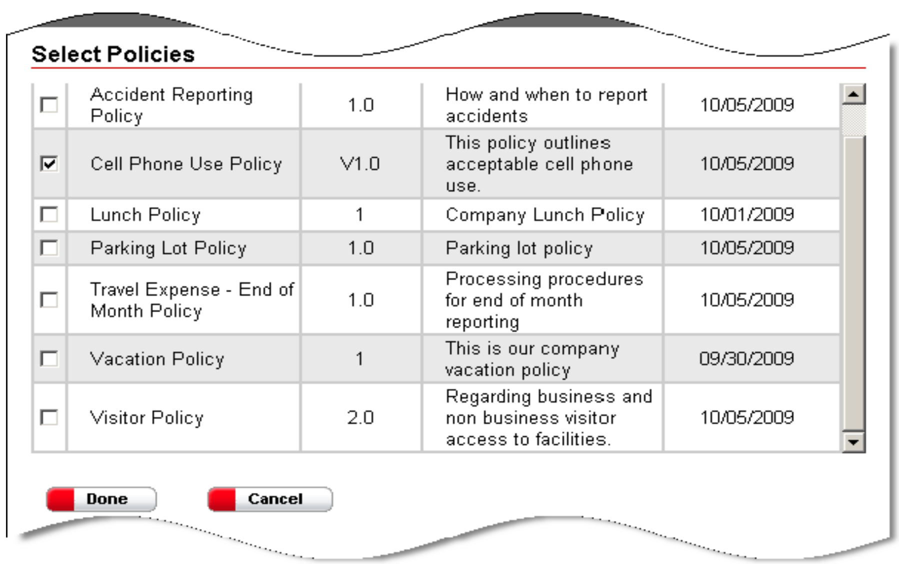
Employees will see the title of the step in the left navigation area.

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



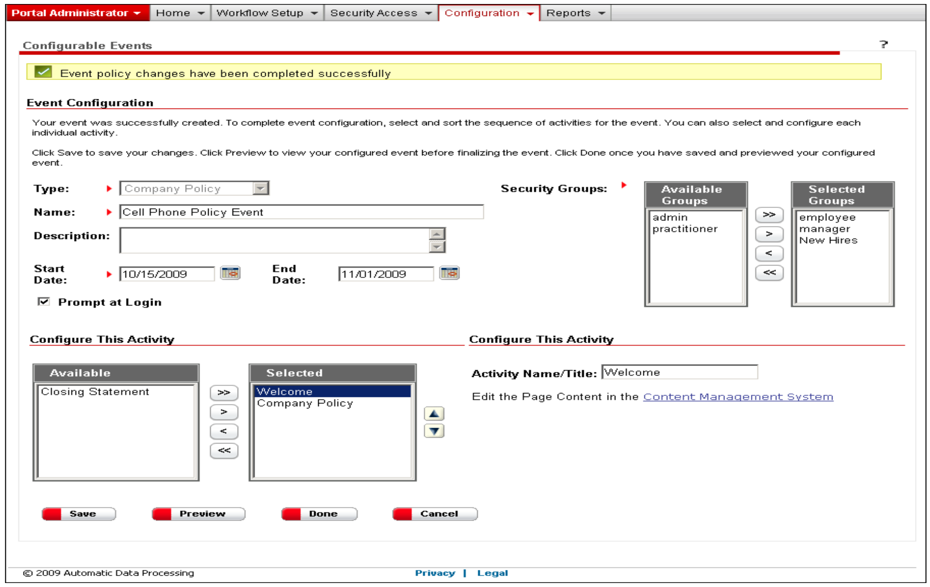
4 Select the policies to include in this event by clicking the **Select policies included in this event** link to the right of the **Selected** list.

5 On the Select Policies page, click to select the policy or policies that should be included in the event, and then click **Done**.



6 If you selected a welcome or closing message, click **Welcome** or **Closing** in the **Selected** list.

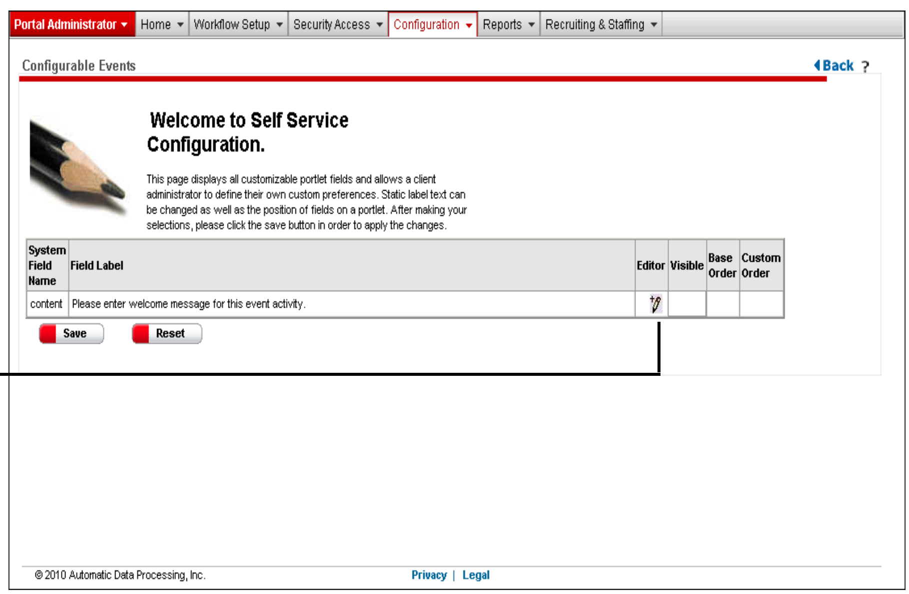
In this example, a welcome message is selected.



7 To change the title of the step that the employees will see, enter a new title in the **Activity Name/Title** field. For example, if you are including one cell phone policy, you can change “Welcome” to “Introduction to Our Latest Cell Phone Policy.”

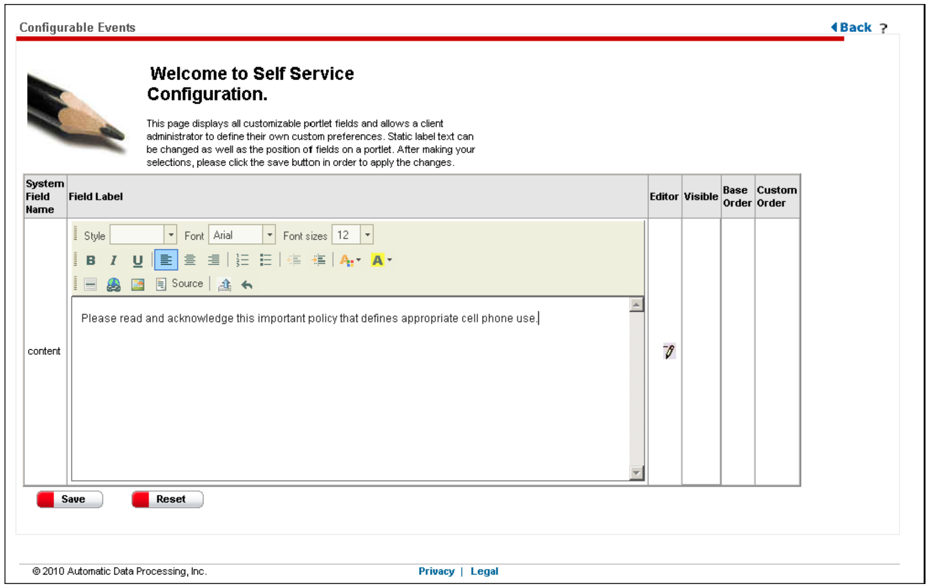
8 Enter text for the welcome or closing message by clicking the **Content Management System** link to the right of the **Selected** list.

9 Click (**Editor**).



Editor icon

10 In the **Content** field, enter your message.



- To change the appearance of the text, use the toolbar icons.
- To add a link to an ADP Workforce Now page, click the link icon. (See "Appendix: Adding Smart Links to ADP Workforce Now Pages" on page 145 for detailed instructions on adding the link.)

11 Click **Save**. This returns you to the Event Configuration page.

12 Click **Save** to save your changes.

13 Preview the event by clicking **Preview**. You will not see the content of the company policy, but you will see the order of steps you set up and the titles of steps you provided. Click **Next** to navigate to the next step, if needed.

14 Click **Return**. This returns you to the Event Configuration page.

Note: If you need to make any changes, you can do so now by updating and saving the information. You can also complete part of the event, save the information, and complete the entire event at a later time.

15 Click **Publish**.

Important: When you click **Publish**, you are officially completing the event. The selected employees will see the policy or policies you included on the start date you provided.

What You Can Change

If you complete an event, but the start date has not been reached for the event, you can change all of the event's details except for the event type. Details include the start date, selected security groups, and content that you want the employees to read.

After the start date is reached for an event, you can only change the end date for the event and the decision to show a prompt when employees log on to ADP Workforce Now.

You cannot make any changes to an event once an end date, if you provided one, is reached.

To make changes to an event, do the following:

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. Click the name of the event you want.
3. Make your changes.
4. Click **Save**.

Tip: If you provided an end date and you learn that many employees are on vacation, you may want to extend the date.

Notifying Employees of a Company Policy

You can send an email notification to employees anytime after you finish setting up a company policy event and before the end date for that event, if you provided one, is reached. The start date does not need to be reached for the event.

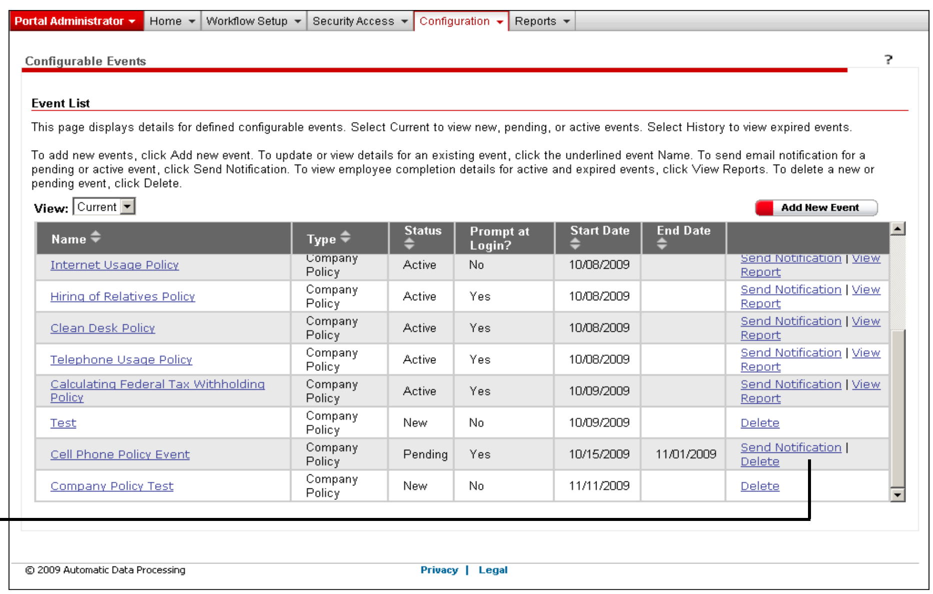
The employees who receive the notification belong to the security groups you identified when you set up the company policy event. You can choose to send the notification to all employees or to only the employees who have not completed the event.

You may want to send a notification to all employees when the company policy is first rolled out. Later, you may want to send a reminder to only the employees who have not acknowledged the policy, which may be particularly useful if an end date is approaching.

Note: The email notification goes to an employee's security management email address. Employees can keep their security management email address up to date by clicking the **Update My Security Profile** link on the ADP Workforce Now logon page.

To set up an email notification, do the following:

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. In the **View** field, keep the selection as **Current**.
3. Click **Send Notification** next to the event you want.

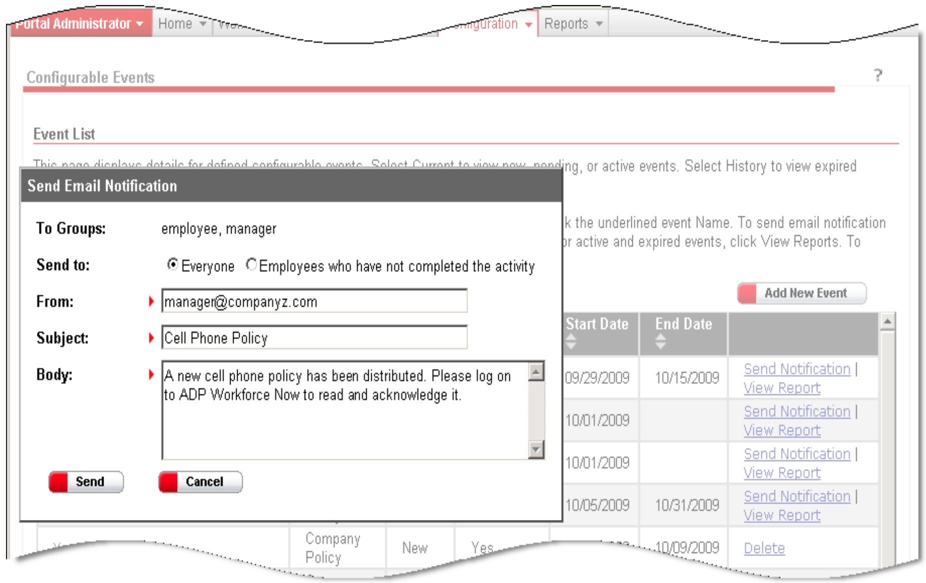


Send Notification option

Note: If you do not see the **Send Notification** option, that means you have not finished setting up the event. Events that are not completely set up are listed as **New** in the **Status** column. After you complete the event, you will see it listed as either **Pending** or **Active**, depending on whether the start date has been reached.

In this example, an email notification is set up for a cell phone policy.

4 Provide the appropriate information. The default subject is the event name. You can change the text in this field.



5 Click **Send**. This returns you to the Event List page.

Changing a Policy

You may need to change a policy to comply with new federal, state, or local laws, such as for a policy on smoking in the workplace. Or, you may learn that a section needs to be added to an attendance policy that covers taking time off for doctor appointments.

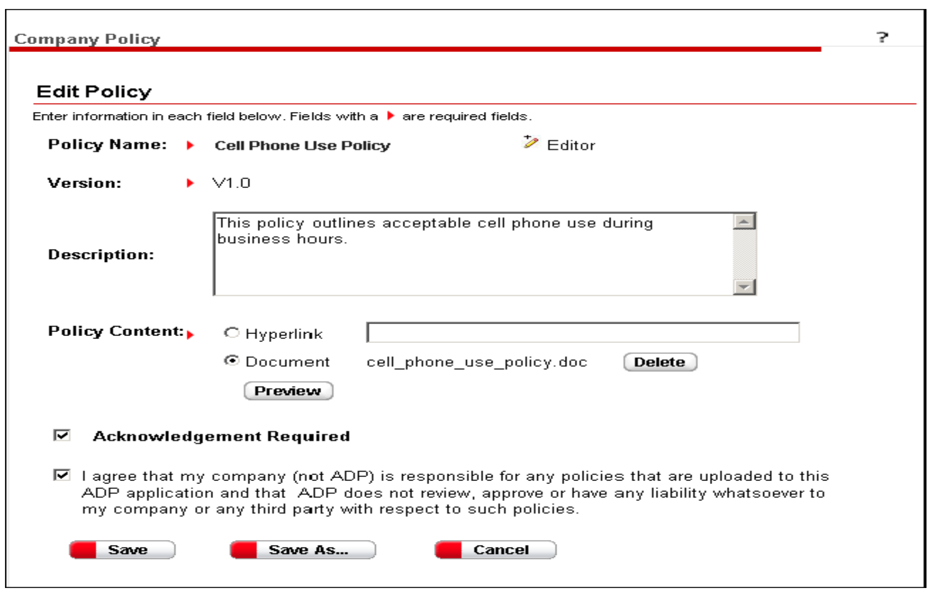
Important: After a policy is rolled out to employees through an associated event, you can only change how the name and description of the policy display in the **Company Policy** area of the Resources page. You cannot change policy content. However, you can stop the event, add a new policy, and then roll out the new policy through a new event.

If you have not rolled out a company policy, you can replace the current policy with a new document file or URL to the new policy.

To change a company policy, do the following:

1. Point to **Home** and select **Resources**.
2. In the **Company Policy** area, click **Manage Policies**.
3. In the **Policy Name** column, click the policy you want to change.
4. If necessary, change the name or its appearance by clicking (**Show Editor**). Change the name in the **Policy Name** field. Change the name's appearance by using the Editor tools that display.

In this example, a description is added for a cell phone policy.



5. If necessary, change the description text.
6. To preview the current policy, click **Preview**. The policy is displayed in a separate window. Click **X** in the upper right corner to close the window.

7 Replace the current policy with a new one by selecting either **Hyperlink** or **Document**, then follow these guidelines.

If You Select	Then
Hyperlink	In the **Hyperlink** field, enter the URL to the new policy. **Note:** Test the link before you distribute it to employees. Some external Web sites open at full size and prevent employees from acknowledging the policy.
Document	Click **Delete** to remove the existing file, then click **OK** to confirm the deletion. Click **Select File**, then click **Browse** to find the new file. Click **Upload**. Acceptable file formats are .doc, .docx, and .pdf.

8 To change whether or not acknowledgement of the policy is required, either click to select or click to clear the **Acknowledgement Required** check box.

9 Click to select the check box next to the liability agreement. You must accept this agreement in order to save your changes.

10 Do one of the following:

- Save your changes using the same version number by clicking **Save**. This returns you to the updated Manage Policies page.
- Save your changes using a new version number by clicking **Save As**. Enter the new version number, then click to select the check box next to the liability agreement. You must accept this agreement in order to save a new version of the policy. Click **Done**. This returns you to the Manage Policies page.

Deleting a Policy

You can delete a company policy if you have not rolled it out through an event in which the start date has been reached. For example, if you created a new version of a policy and employees have not seen the older version, you may want to delete this older version so that your records are clear and up to date.

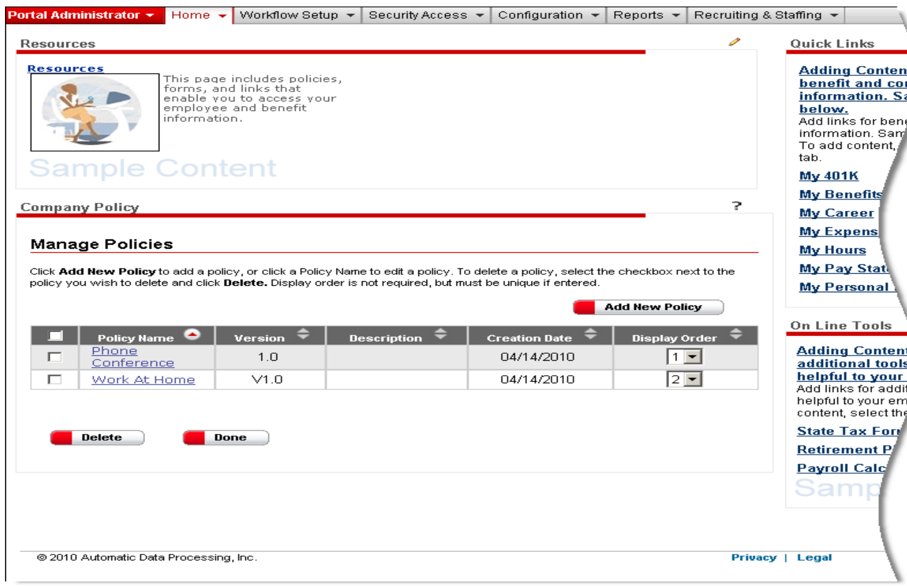
In addition, you can delete any policy not associated with any active event by purging company policy acknowledgement history. See “Purging the Acknowledgement Data for a Company Policy Event” on page 108.

To delete a company policy that you have not rolled out to employees, do the following:

1 Point to **Home** and select **Resources**.

2 In the **Company Policy** area, click **Manage Policies**.

3 Click to select the check box next to the policy you want to delete.



4 Click **Delete**.

5 Click **OK** to confirm the deletion. This returns you to the updated Manage Policies page.

Purging the Acknowledgement Data for a Company Policy Event

You can permanently remove all acknowledgment data for an expired company policy event.

Important: It is strongly recommended that you view and export the policy acknowledgment data for backup before you purge it. Once the data is removed, you can no longer access it. Purged policy acknowledgment data cannot be recovered.

To purge acknowledgment data for a company policy event, do the following:

1. Select **Portal Administrator** from the role selector.
2. From the **Configuration** tab, select **Set Up Employee Activities**. The Event List page displays.
3. Select **History** from the **View** field. All expired company policy events will be listed.
4. Select the **Purge History** link. The following message displays:

   You are permanently removing all policy acknowledgment data for the selected event. The data cannot be recovered.
5. You can select the **Delete the event's policies that are not associated with other events** check box. If the event has company policies that are associated with other events, they are not deleted.
6. A confirmation message displays. Select **Yes** to remove the event company policy acknowledgment data.

Hiding a Policy

After a Company Policy event expires, employees can still read or acknowledge the company policy that was included in the event in the **Company Policy** area of the Resources page. When they click the **Read and acknowledge all policies** link in this area, they can view all policies.

To prevent an employee from seeing a policy that is part of an expired event, you can hide the policy. To hide a policy, the associated company policy event must be expired. If there are multiple policies in the company policy event, the event must be expired before any of the policies can be hidden. If an event is expired, it is moved from the **Current** view to the **History** view on the Event List page **(Configuration ~ Set Up Employee Activities)**.

To hide a policy, do the following:

1 From the Manage Policies list page, select the check box in the **Hide** column for the policy(ies) you want to hide.

Note: If a policy is part of an active event, the **Hide** check box will be grayed out and unavailable on the **Manage Policies** list page.

2 Click **Done**.

The policy(ies) you selected will be hidden from employee view, but you will still be able to manage the hidden policies, and the hidden policies will be included in generated reports.

Editing Text in the Company Policy Area

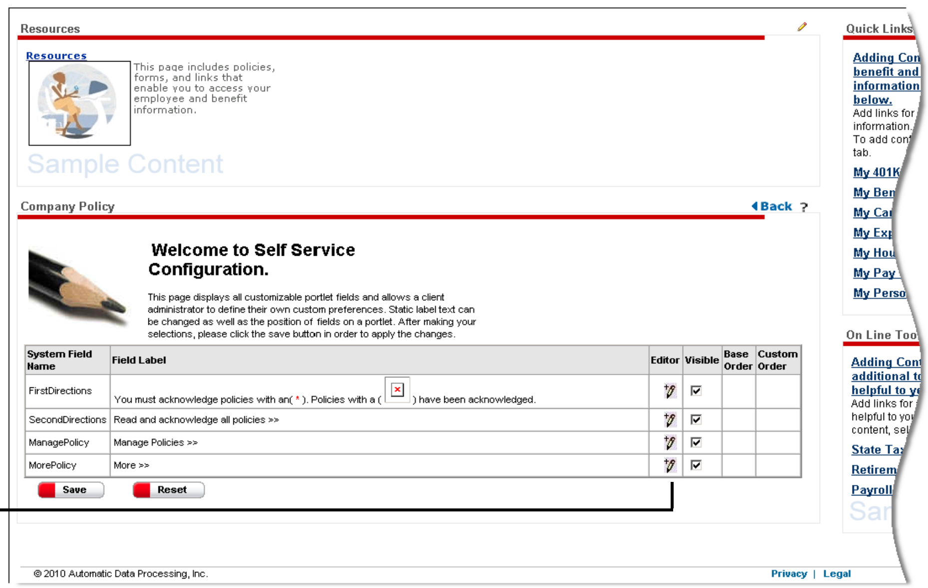
You can edit the link text that is displayed in the **Company Policy** area of the Resources page. You can also change the appearance of the instructional text, such as the font and color, to match your company's branding.

1 Point to **Home** and select **Resources**.

2 Click to select the **Edit page content** check box at the top left of the site. Pencil icons are displayed to indicate the areas you can customize.

3 Click (**Configure**) in the **Company Policy** area of the page.

4 Click (**Editor**) to the right of the text you want to edit.



Editor icon

Tip: For more information about customizing text, click (**Help**) in the upper-right corner of the Self Service Configuration page.

Stopping an Active Event

You may want to stop a company policy event while employees are in the process of completing it (for example, if you learn that changes need to be made to the policy included in the event). This type of event is active.

Tip: Before you stop an active event, send all selected employees an email notification alerting them to the change.

What Happens After You Stop an Event

After you stop a company policy event:

- You cannot send any more email notifications about the event to employees.
- Employees no longer receive a message about the event when they log on to ADP Workforce Now, if you are using this feature.
- Employees no longer view the event in their activities list.
- The event is moved from the Current list to the History list on the Event List page.

Employees can still read or acknowledge the company policy that was included in the event in the **Company Policy** area of the Resources page. When they click the **Read and acknowledge all policies** link in this area, they can view all policies.

You can still review the company policy that was included in the event on the Manage Policies page. All company policies that have been set up for your company are listed. You can also view a report to check which employees have acknowledged the policy.

How to Stop an Event

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. In the **View** field, keep the selection as **Current**.
3. View the events, then click the name of the one you want. The event must be listed as **Active** in the **Status** column.
4. In the **End Date** field, enter or change the date to when you want the event to end. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. The end date can be the current date or a future date. It must be later than the start date.
5. Click **Save**.
6. To return to the updated Event List page, click **Cancel**.

Deleting a New or Pending Event

You can delete a company policy event that is new or pending because employees have not received it yet. Perhaps, due to economic reasons, your company cannot offer tuition reimbursement to employees anymore. You can cancel a tuition reimbursement event that employees have not received yet. You can then delete the tuition reimbursement policy included in the event since you have not rolled it out. (See "Deleting a Policy" on page 107.)

A new event is one that has been created, but not completely set up. For example, you may have created a new vacation policy event, but you have not added a welcome message or the actual policy for the employees to read. A pending event is completely set up, but the start date has not been reached.

To delete a new or pending event, do the following:

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. In the **View** field, keep the selection as **Current**.
3. View the events, then click **Delete** to the right of the event you want to delete. The event must be listed as **New** or **Pending** in the **Status** column.
4. Click **OK** to confirm the deletion. This returns you to the updated Event List page.

Viewing Reports for a Company Policy Event

After employees receive a company policy event, you can check which employees have acknowledged the policy or policies in the event, and send an email reminder to those who have not.

Note: Managers can also generate policy acknowledgement status reports, send email reminders, and check recent and previous policies for their employees also. For more information about managers, click ? (**Help**) in the top-right corner of the **My Team > Policy Acknowledgement Status** page.

You can also export the data to a .csv file for archiving and reporting.

Important: On the **Reports** menu, you can view reports for older company policies that were not rolled out to employees through company policy events.

To view a report for a company policy event, do the following:

1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, do one of the following:

- Select **Current** to view active events (events in progress for which an end date has not been reached).
- Select **History** to view expired events (events for which an end date has been reached).

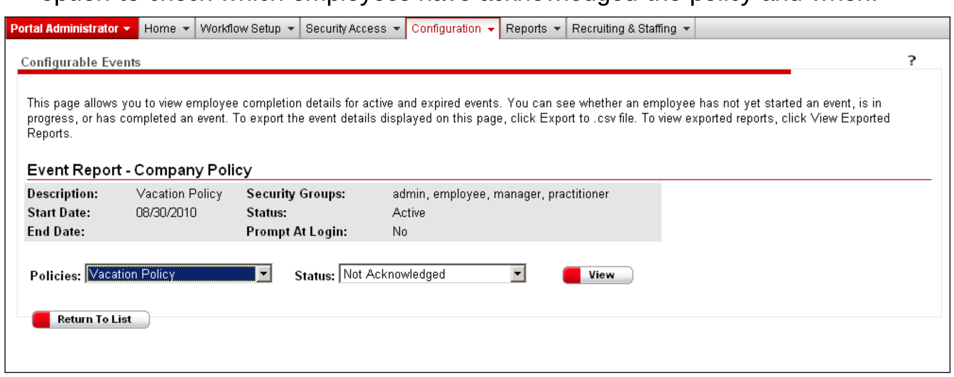
3 View the events, then click **View Report** to the right of the event you want.

Note: If you do not see **View Report** next to a current event, that means the event has not been completely set up or the start date has not been reached. You can only view reports for current events that are listed as **Active** in the **Status** column.

4 In the **Policies** field, do one of the following:

- Select **All** to view details for all policies. If you included multiple policies in the event, you can use this option to check which employees have completed the event. This option does not give you details for a specific policy if you included multiple policies in the event.
- Select an individual policy to view details for a specific policy. You can use this option to check which employees have acknowledged the policy and when.

In this example, a specific policy is selected.



5 In the **Status** field, make a selection.

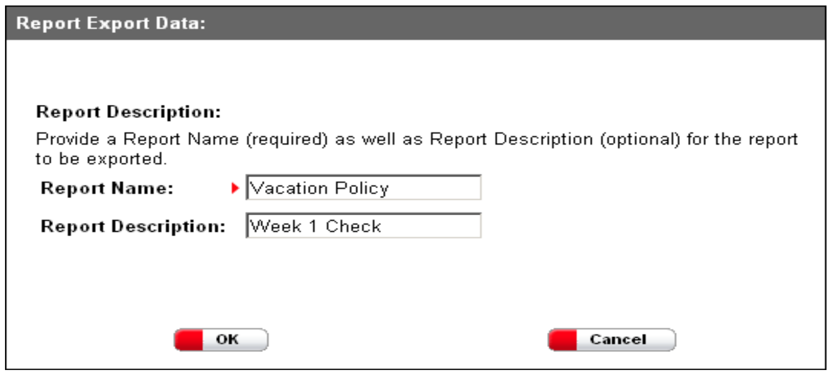
6 Click **View**.

Result: Your search results are displayed on the bottom of the page.

7 To export the data on this page to a .csv file, click **Export to .csv**. The Report Export Data dialog box displays.

Note: The exported data includes the status of all eligible employees. For example, if you choose to view which employees have acknowledged a specific policy, the exported report will include the employees who have acknowledged the policy and the employees who have not acknowledged the policy.

8 In the **Report Name** field, enter a name for the report to be exported.



9 If desired, enter a description in the **Report Description** field.

10 Click **OK** to submit the data for the export.

11 Click **OK** to complete the export process.

12 To view the exported report or save it to a different location, refer to "Viewing or Saving Exported Reports" on page 114.

13 To delete the exported report, refer to "Deleting Exported Reports" on page 115.

Viewing or Saving Exported Reports

After you have exported a report to a .csv file, you can view the report or save it to another location that you specify. (For help creating a .csv file, refer to "Viewing Reports for a Company Policy Event" on page 113.)

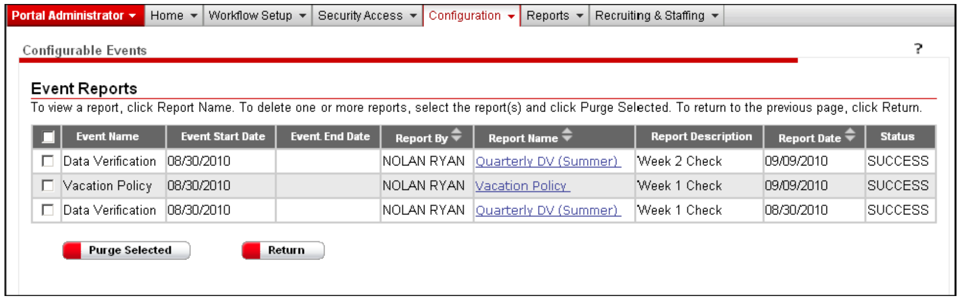
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, select **Current** or **History**.

3 Click **View Report** to the right of the event you want.

4 On the Event Report page, click **View Exported Reports**.

Result: All exported reports are displayed.



5 In the **Report Name** column, click the name of the report that you want. The File Download dialog box displays.

6 To view the file, click **Open**.

7 To save the file to a specified location, click **Save**.

Deleting Exported Reports

After you have exported a report to a .csv file, you can delete reports that you no longer need. (For help creating a .csv file, refer to "Viewing Reports for a Company Policy Event" on page 113.)

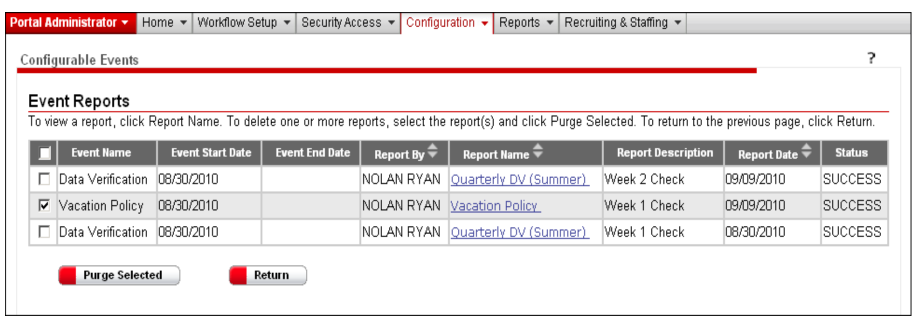
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, select **Current** or **History**.

3 Click **View Report** to the right of the event you want.

4 On the Event Report page, click **View Exported Reports**.

Result: All exported reports are displayed.



5 Click to select the check box next to the reports that you want to delete, and then click **Purge Selected**.

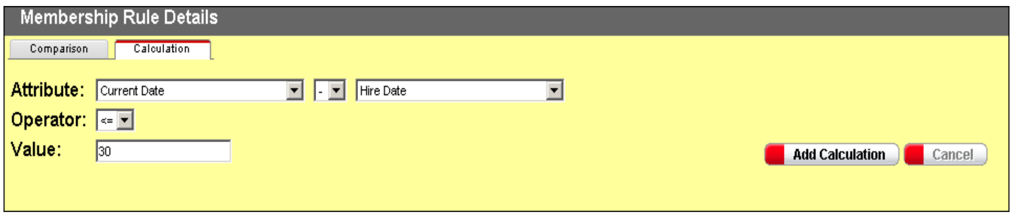
6 Click **OK** to confirm your action.

Frequently Asked Questions

Q: How can I distribute a company policy event only to new hires?

A: A company policy event can be distributed only to new hires by setting up a custom security group for these employees. When you create the company policy event, you choose to distribute it only to that security group. Custom security groups are added on the Security Groups page on the **Security Access** menu.

A membership rule can be used to further define the group. For example, your company may define new hires as those who have been employed by the company for 30 days or less. A rule can be added by creating this calculation statement:



After 30 days, employees will be removed from the group automatically.

Tip: If a custom security group has been set up for new hires and you need to distribute a company policy event to all employees, include all employee security groups when you create the event.

For detailed instructions on setting up custom security groups and managing membership rules, refer to “Chapter 3: Setting User Access in ADP Workforce Now” in the *ADP Workforce Now® Security Guide*.

Q: What happens to the policies I had on my site before I was able to distribute them through company policy events?

A: All existing policies are automatically available in the new version of ADP Workforce Now.

Employees can read and acknowledge all policies by clicking the **Read and acknowledge all policies** link in the **Company Policy** area of the Resources Page. However, they should read or acknowledge any new policies that are added in ADP Workforce Now by completing the associated event that you set up because the event may include other information, such as a welcome and closing message.

Employees can access active company policy events by using the **Employee Activities** link in the Message Center at a Glance, located on the Welcome page on the **Home** menu. This link brings them to the **Employee Activities** area of the Message Center page.

Portal administrators and practitioners can view all policies that have been set up for their company by clicking the **Manage Policies** link in the **Company Policy** area of the Resources page.

Q: Can I roll out an existing policy through a new event?

A: Yes, you can roll out an existing policy through a new event. All employees who belong to the security groups you identify when you create the event will receive the policy.

Q: What happens to employees who are hired after an event is rolled out? Will the event be sent to them?

A: Yes, new hires will receive the event, as long as the end date has not been reached. New hires are assigned to a security group, and ADP Workforce Now keeps track of who has been sent the event.

Tip: If your company has a policy that all new hires need to acknowledge, don't enter an end date when you set up the associated event. Doing so keeps the event active for all future new hires.

Q: How long does an event remain in an employee's activity list?

A: The event remains in the activity list until the employee completes the event or until the end date for the event, if you provided one, is reached.

Q: When should I provide an end date for a company policy event?

A: Providing an end date for a company policy event can be helpful if employees need to read and acknowledge certain policies at important times of the year, such as year-end.

Q: What happens if the end date for an event is reached and some employees have not acknowledged all the policies in the event?

A: *For employees:* The event is removed from their activities list. The policies, however, remain in the **Company Policy** area of the Resources page. Here, employees can still read and acknowledge the policies by clicking the **Read and acknowledge all policies** link. They then select the policy on the Policy Acknowledgements page. Their acknowledgement will be recorded on this page and in the report for the event.

For portal administrators: The event is moved from the Current list to the History list on the Event List page. The policies, however, remain in the **Company Policy** area of the Resources page. Here, portal administrators (and also practitioners) can view all policies that have been set up for their company by clicking the **Manage Policies** link. Portal administrators can also view a report to check which employees have acknowledged the policies.

Q: How long will employees be prompted at logon for an event?

Employees will only be prompted at logon if you set up the event using that feature. The employees will continue to receive the prompt until they have acknowledged all the policies in the event, or until an end date for the event - if you provided one - is reached.

Q: After I send an email notification, will I be informed if any emails are not delivered due to incorrect or invalid email addresses?

A: You can find out which email notifications were not delivered if you enter your real email address in the **From** field on the email notification setup page. You will then receive notifications about which emails were not delivered. email notifications go to an employee's security management email address.

Tip: The number of email notifications that are not delivered can be reduced if employees keep their security management email address up to date. They can do this by clicking **Update My Security Profile** on the ADP Workforce Now logon page.

Q: Why haven't employees received an event that I set up on the start date I provided?

A: You may not have clicked **Publish** after you created the event and added your content. You must click **Publish** in order for the event to be completely set up and for the selected employees to see the event in their activities list on the start date you provided.

You can check the status of your event on the Event List page. If the status is **New**, select the event, review the event details again to make sure they are correct, and click **Done**.

Q: What does the report for a company policy event tell me?

A: The report for a company policy event provides details on all policies or on a specific policy included in the event, depending on what you choose. All reports include employee names and user IDs. Reports for specific policies also include the acknowledge date and time.

If you choose to view details for all policies, the options are:

- Employees not yet started
- Employees in progress
- Employees completed

If you choose to view details for a specific policy, the options are:

- Acknowledged
- Not acknowledged

A company policy event is not considered completed until all the policies in it have been acknowledged.

Note: The reports on the **Reports** menu are for existing company policies that were not rolled out to employees through an event that you set up.

Q: Who is allowed to post a company policy on ADP Workforce Now?

A: Both the portal administrator and the practitioner can post a company policy on ADP Workforce Now. This just means that the policy is set up and uploaded on the site. The employees will not see the policy until an event for the policy is set up and the start date for the event is reached.

Q: Who is allowed to set up a company policy event?

A: Only the portal administrator can set up a company policy event. The process of setting up the event is what is needed to roll out the policy to employees.

Who in your organization can do this depends on their role and their security privileges.

Q: How many policies should I include in an event?

A: The number of policies that you include in an event is up to you. You may want to bundle related policies together, such as benefits policies, or those that need to be acknowledged by a specific date.

Q: What should I do if employees received an event and I learn that one of the policies included in the event was an older version?

A: You should stop the event by entering an end date of today. Once the event is stopped, it is removed from the employees' activity list. You should then roll out the correct policy through a new event. You can make a note in the welcome step that communicates the change to the employees. You can also hide the older version of the policy by selecting the check box in the **Hide** column for the policy on the Manage Policies list page.

Q: Why can't I hide a company policy?

A: Only company policies that are part of an expired event can be hidden. If multiple policies are part of an event, the event must be expired before any of the policies can be hidden. You can stop an event by entering an end date of today.

Q: Why can't I delete a policy?

A: You cannot delete a policy that employees have seen in their activities list. The policy is retained for your records. However, you can set up a new policy and roll it out to employees through a new event.

Note: You can delete existing policies that were not rolled out through a company policy event. Records of these deletions are listed in the Audit Trail of Past Policies on the **Report** menu.

Chapter 5

Managing New Hire and Data Verification Events for Employees

If your company is using Self Service, you can help new employees complete new hire tasks, such as providing direct deposit and dependent information. You can also confirm existing employees' information at important times of the year, such as year-end. You do this by setting up new hire and data verification events for employees. Only portal administrators can set up these events.

Note: The availability of new hire and data verification events and associated functionality depends on how your company is set up and your permissions for accessing the features.

When you set up a new hire or data verification event, you include all the tasks employees need to complete in ADP Workforce Now® as a single set of tasks. This allows employees to complete all required tasks from one convenient location in their activities list. Employees can access this list by using the **Employee Activities** link in the Message Center at a Glance, located on the Welcome page on the **Home** menu. This link brings them to the **Employee Activities** area of the Message Center page.

You can include several tasks in an event and, if needed, an end date for completing the event. You can also alert employees to the event by:

- Having a message pop up when they log on to ADP Workforce Now. This message directs them to where they need to go to complete the event.
- Sending them an email to let them know about the new event.

Note: If your company is using the HR & Benefits module, employees may have to complete other new hire or data verification tasks before they can complete an associated event that you set up.

Setting New Hire and Data Verification Permissions

If your company is using the new hire or data verification feature, you can set security permissions for portal administrators to specify their access to the features and to specify how they can work with the features.

Set permissions for the new hire and data verification features according to the following instructions.

1. Select **Security Groups** from the **Security Access** menu to access the Security Groups list page.
2. Click the name of the security group for which you want to set new hire and data verification permissions.
3. On the Security Group detail page, click the **Permissions** tab.

4 Under the **Administrator Configuration Tab ~ Set Up Employee Activities**, you can click to select or clear the **New Hire** check box or the **Data Verification** check box, and you can click to select or clear permissions to add, edit, or delete events.

- If you want members of a security group to have view-only access to new hire or data verification events, click to select the event type check box (**New Hire** or **Data Verification**), and leave the **Add Selected Activities**, **Edit Selected Activities**, and **Delete Selected Activities** check boxes clear (not selected).
- If the **New Hire** or **Data Verification** check box is cleared for a security group that previously had access to the feature, members of the security group can no longer create new events, but they can access events and reports that were created before the activity was turned off, and users can still acknowledge those events.
- If you click to select the **Add Selected Activities**, **Edit Selected Activities**, or **Delete Selected Activities** check box, you must select at least one event type (New Hire or Data Verification).

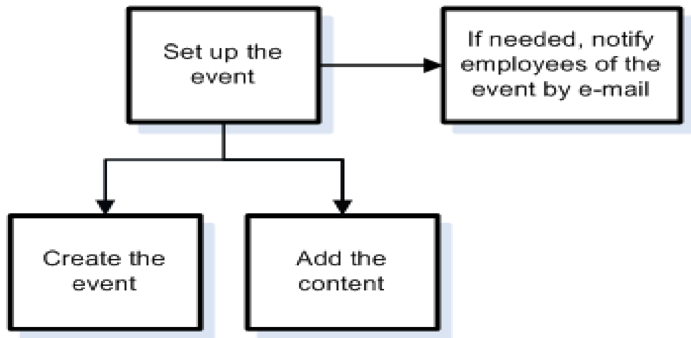
Add, Delete, and **Edit Selected Activities** check boxes.

New Hire and **Data Verification** check boxes**.**

Process for Distributing an Event

In order to distribute a new hire or data verification event to employees, you have to set up the event. You first create the event, then add the content you want your selected employees to receive.

The Process



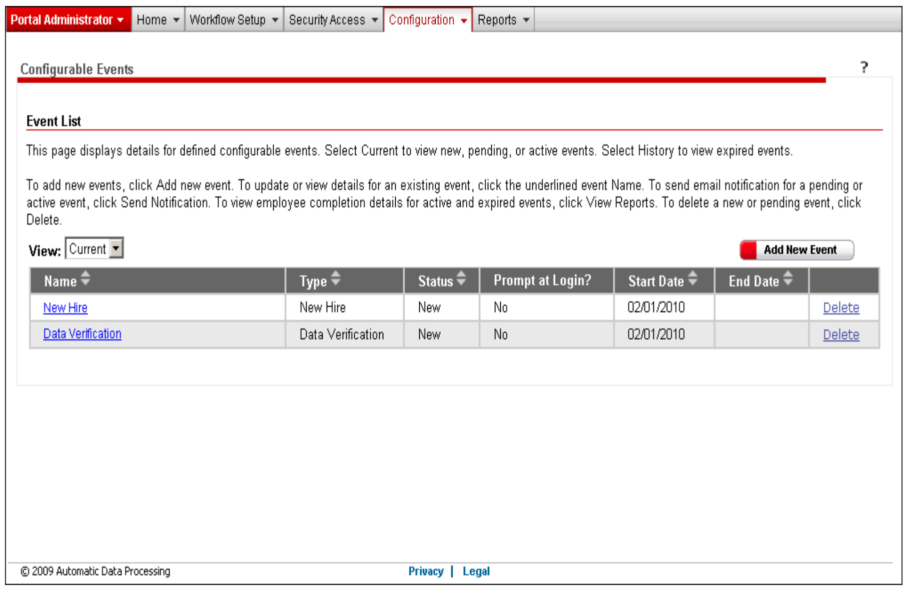
Setting Up an Event

To set up a new hire or data verification event, you first create the event, then add the content you want to include in the event. You should work with your company's HR and/or payroll practitioner to determine the details you need to include in the event, such as which tasks you should select and which employees should receive the event.

Creating the Event

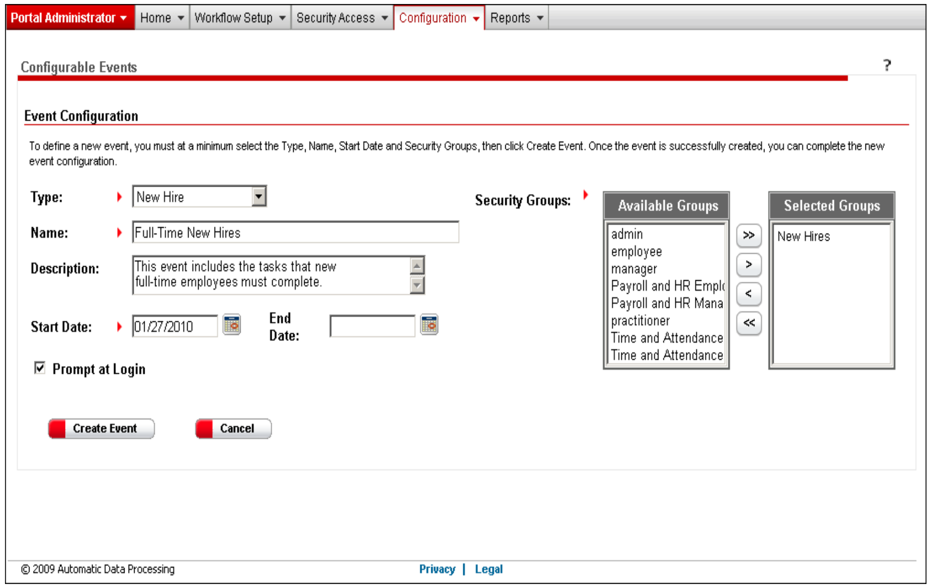
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 Click **Add New Event**.



3 In the **Type** field, select **New Hire** or **Data Verification**.

In this example, we are creating a new hire event.



4 In the **Name** field, enter a name for the event.

5 If needed, enter a description in the **Description** field.

6 In the **Start Date** field, enter the start date of the event. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. This is the date on which the event will be available to employees.

Important: If you set up an event using a current date, employees will receive the event immediately. After this happens, you can only change the end date and the **Prompt at Login** check box. When creating an event, you may want to enter a future start date. Once you confirm that all your event details are correct, you can go back and change the start date to the current date, if needed.

7 If needed, enter an end date in the **End Date** field. You can enter the date manually (mm/dd/yyyy) or select the date from the calendar. You may want to include an end date for a data verification event if you need employees to update their information at important times of the year, such as year-end.

Important: Once an end date is reached, employees can no longer complete the event. They can still complete the tasks that were included in the event on the appropriate pages in ADP Workforce Now, but the completion of these tasks will not be recorded in the report for the event.

8 In the **Security Groups** area, choose the employee security groups who should complete the event. In the **Available Groups** list, click the security group(s) you want, and then use the arrow keys to move the group(s) into the **Selected Groups** list.

All employees were assigned to security groups when ADP Workforce Now was set up for your company. These groups affect what users can see and do on the site. Your groups include default groups (employee, manager, practitioner, and admin) and custom groups that may have been set up.

Tip: Before you create a new hire event, make sure that a custom security group has been set up for new hires. (Refer to "How can I distribute a new hire event only to new hires?" on page 139 for help completing this task.) When you get to this step, select only this group so that only new hires receive the event.

For detailed information on setting up security groups, refer to "Chapter 3: Setting User Access in ADP Workforce Now" in the *ADP Workforce Now® Security Guide*.

9 If you want employees to receive a notification message about this event when they log on to ADP Workforce Now, click to select the **Prompt at Login** check box. Employees will see this prompt for the first time on the start date you provided. They can choose to complete the event then or receive another message the next time they log on. They will continue to receive the message each time they log on until they complete the event or until the end date for the event, if you provided one, is reached.

10 Click **Create Event**. The Event Configuration page is redisplayed. You can now add the content to your event.

Adding the Content

After you create the new hire or data verification event, you need to add the content (the tasks). You choose what you want to send from the list of employee items that are available to you. What you see depends on the modules your company is using and how your company is set up.

For a new hire event, you may want to include content related to personal information, benefits, direct deposit, and tax withholding. For a data verification event, you may want to include content related to personal information, emergency contacts, base pay history, and personal accrued time.

You may want to include a welcome message that lets employees know that they have to complete the event, and by a specific date. You may also want to send a closing message that provides further instructions to employees.

Table 1 lists available content that may display in the **Configure This Activity** area of the screen depending on the module(s) your company is using.

Note: The content listed in Table 1 may or may not display in the **Configure This Activity** area of the screen depending on how your company is set up. The **Welcome** and **Closing** selections are always available.

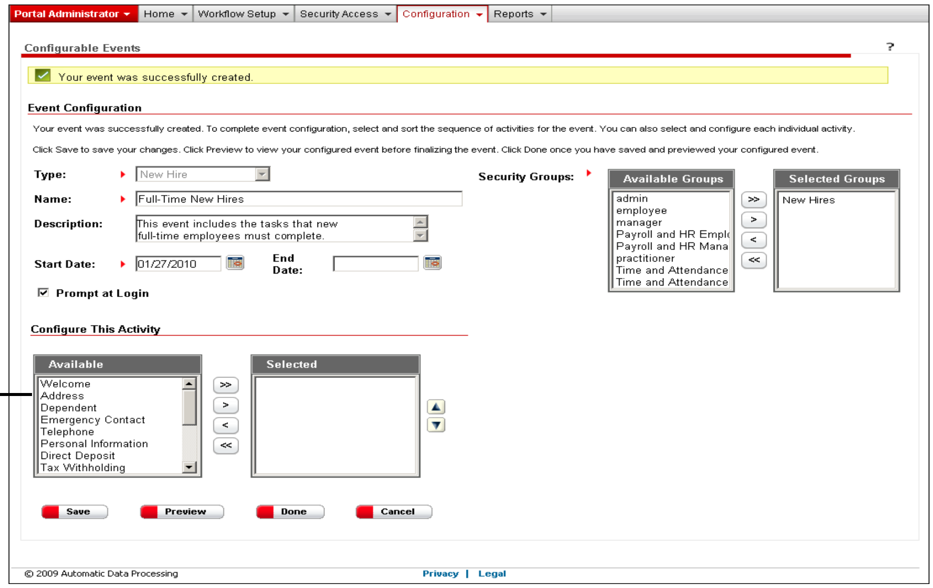
Items are the same for new hire and data verification events. Each item is set up as a separate step in the event.

Table 1: Available Content for Configuring New Hire and Data Verification Events

Content	Module(s)		
	Payroll Only	Payroll and HR	Payroll and HR Benefits
Pay & Taxes			
Direct Deposit	✓	✓	✓
Tax Withholding	✓	✓	✓
Base Pay History	✓	✓	
Career			
Career Profile		✓	
Job Profile	✓	✓	✓
Performance Reviews		✓	
Benefits			
Benefits Summary		✓	
Benefits Enrollment		✓	
Personal Accrued Time	✓	✓	✓
Personal Information			
Addresses	✓	✓	
General	✓	✓	
Phone Numbers	✓	✓	
Dependent Information		✓	
Emergency Contacts		✓	

To add your content, do the following:

1. In the **Available** list in the **Configure This Activity** area, click what you want to include, and then use the arrow keys to move the items into the **Selected** list. You must choose at least one item other than **Welcome** or **Closing**.



   The items will be displayed in the order you select them. If you need to change the order, use the up and down arrows to the right of the **Selected** list.

2. Click each item in the **Selected** list.

3. For each selection, you can change the title of the step that the employees will see by entering a new name in the **Activity Name/Title** field. For example, if you are including the Emergency Contact item, the default title is “Emergency Contact.” You can enter a name that is more user-friendly, such as “Who to Call in an Emergency.

Note: For certain tasks, employees may need to scroll down the page to save and verify changes.

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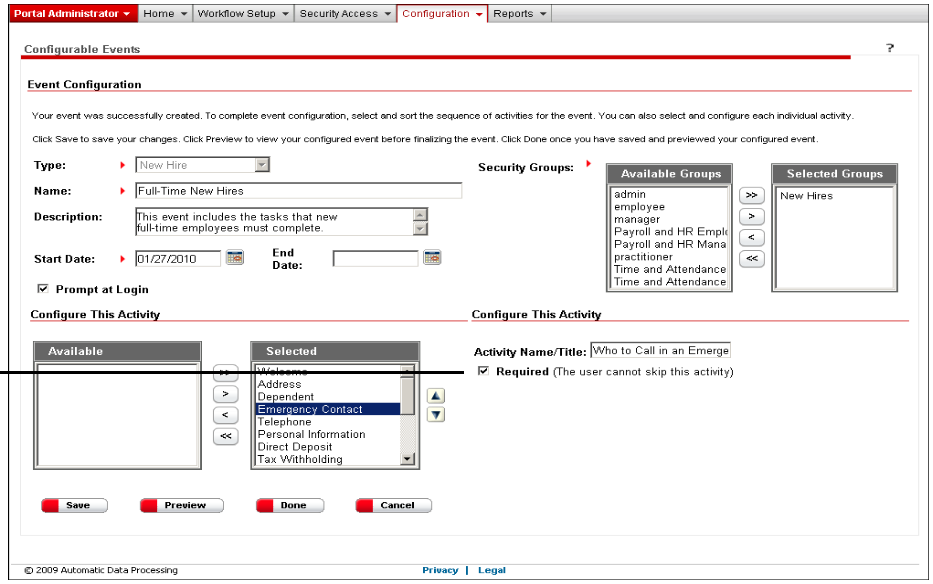
4 For each selection, indicate if you want the user to be required to complete the step. When you move a step to the **Selected** area, the **Required** check box is selected by default. If you do not want the step to be required, click to clear the check box.

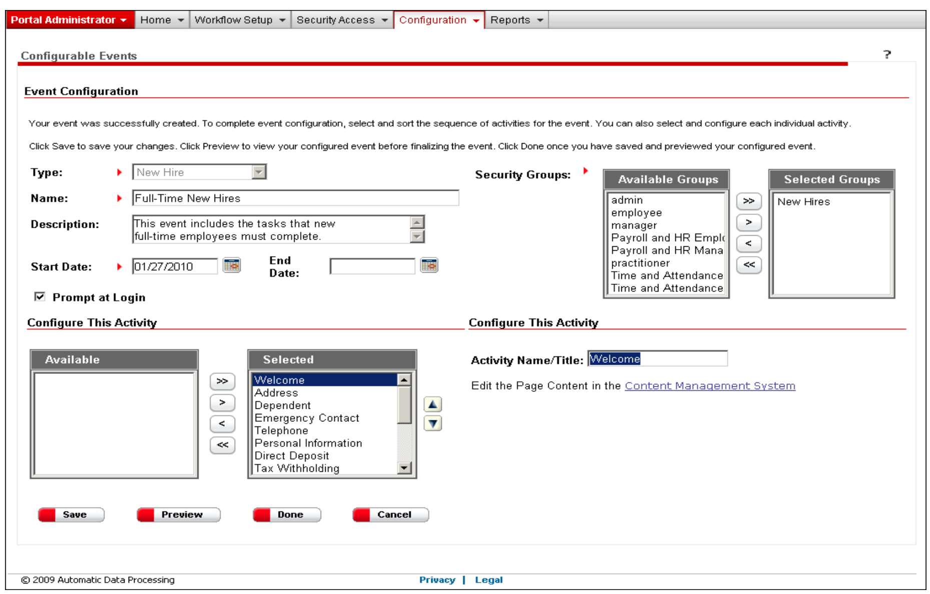
Keep this check box selected if you want employees to be required to complete the step.



Note: The **Required** check box is not displayed for Welcome and Closing items.

5 If you selected a welcome or closing message, click **Welcome** or **Closing** in the **Selected** list.

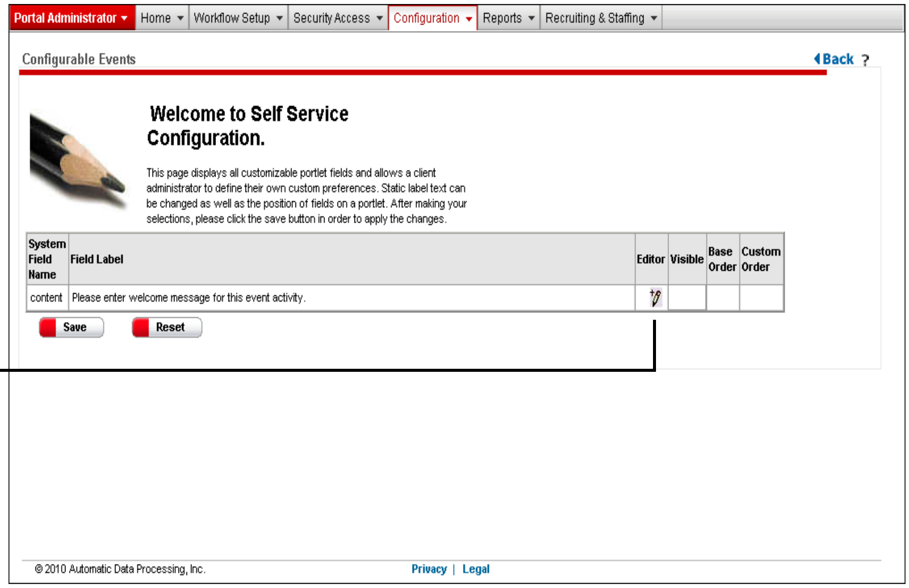
In this example, a welcome message is selected.



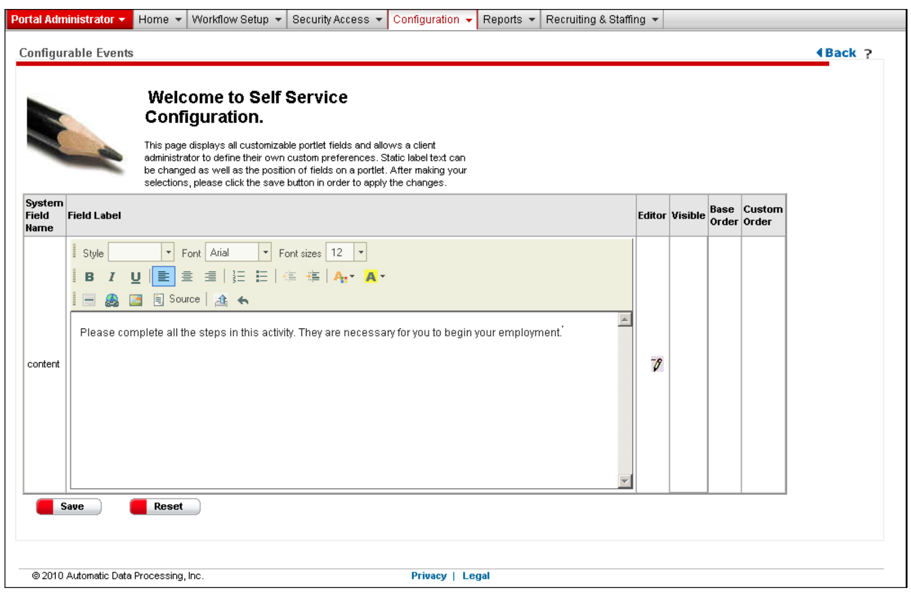
6 Enter text for the welcome or closing message by clicking the **Content Management System** link to the right of the **Selected** list.

7 Click (**Editor**).

Editor icon



8 In the **content** field, enter your message.



- To change the appearance of the text, use the toolbar icons.
- To add a link to an ADP Workforce Now page, click the link icon. (See “Appendix: Adding Smart Links to ADP Workforce Now Pages” on page 145 for detailed instructions on adding the link.)

9 Click **Save**. You are returned to the Event Configuration page.

10 Click **Save** to save your changes.

11 Preview the event by clicking **Preview**. You will see the order of steps you set up and the titles of steps you provided. Click **Next** to navigate to the next step, if needed.

12 Click **Return**. This returns you to the Event Configuration page.

Note: If you need to make any changes, you can do so now by updating and saving the information. You can also complete part of the event, save the information, and complete the entire event at a later time.

13 Click **Publish**.

Important: When you click **Publish**, you are officially completing the event. The selected employees will see the event in their activities list on the start date you provided.

What You Can Change

If you complete an event, but the start date has not been reached for the event, you can change all of the event's details except for the event type. Details include the start date, selected security groups, and content in the event. For example, you may want to extend an end date for an event if you learn that many employees are on vacation.

After the start date is reached for an event, you can only change the end date for the event and the decision to show a prompt when employees log on to ADP Workforce Now.

You cannot make any changes to an event once an end date, if you provided one, is reached.

To make changes to an event, do the following:

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. Click the name of the event you want.
3. Make your changes.
4. Click **Save**.

Notifying Employees of an Event

You can send an email notification to employees anytime after you finish setting up a new hire or data verification event and before the end date for that event, if you provided one, is reached. The start date does not need to be reached for the event.

The employees who receive the notification belong to the security groups you identified when you set up the event. You can choose to send the notification to all employees or to only the employees who have not completed the event.

You may want to send a notification to all employees when the event is first sent to them. Later, you may want to send a reminder to only the employees who have not completed the event, which may be particularly useful if an end date is approaching.

Note: The email notification goes to an employee's security management email address. Employees can keep their security management email address up to date by clicking the **Update My Security Profile** link on the ADP Workforce Now logon page.

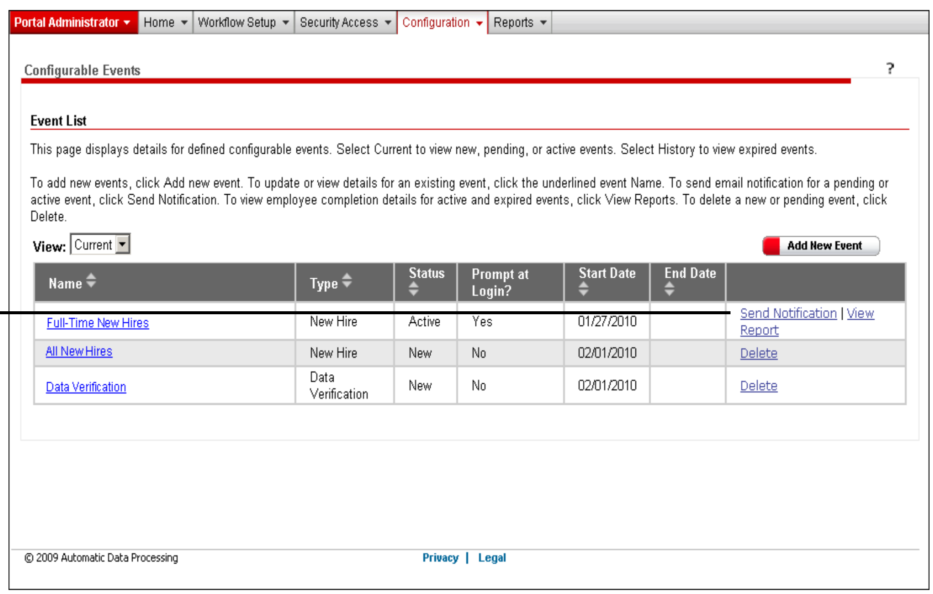
To set up an email notification, do the following:

1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, keep the selection as **Current**.

3 Click **Send Notification** next to the event you want.

Send Notification option



Note: If you do not see the **Send Notification** option, that means you have not finished setting up the event. Events that are not completely set up are listed as **New** in the **Status** column. After you complete the event, you will see it listed as either **Pending** or **Active**, depending on whether the start date has been reached.

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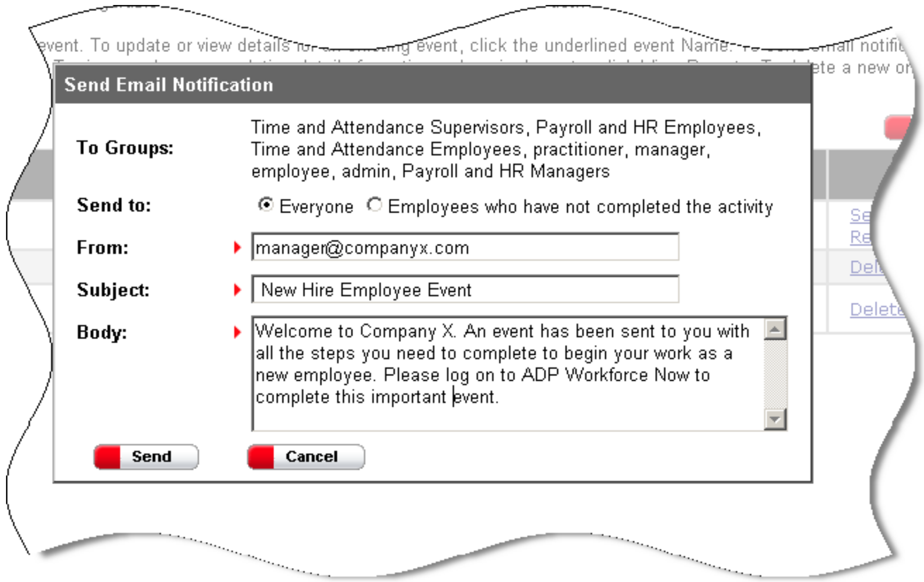
4 Provide the appropriate information. The default subject is the event name. You can change the text in this field.

In this example, an email notification is set up for a new hire event.



5 Click **Send**. You are returned to the Event List page.

Stopping an Active Event

You may want to stop a new hire or data verification event while employees are in the process of completing it (for example, if you learn that certain tasks that you did not include in the event now need to be completed by employees). This type of event is active.

Tip: Before you stop an active event, send all selected employees an email notification alerting them to the change.

What Happens After You Stop an Event

After you stop an event:

- You cannot send any more email notifications about the event to employees.
- Employees no longer receive a message about the event when they log on to ADP Workforce Now, if you are using this feature.
- Employees no longer view the event in their activities list.
- The event is moved from the Current list to the History list on the Event List page.

You can view a report to check which employees completed the event during the time period you specified.

How to Stop an Event

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. In the **View** field, keep the selection as **Current**.
3. View the events, then click the name of the one you want. The event must be listed as **Active** in the **Status** column.
4. In the **End Date** field, enter or change the date to when you want the event to end. You can enter the date manually (format is mm/dd/yyyy) or select the date from the calendar. The end date can be the current date or a future date. It must be later than the start date.
5. Click **Save**.
6. To return to the updated Event List page, click **Cancel**.

Deleting a New or Pending Event

You can delete an event that is new or pending because employees have not received it yet. A new event is one that has been created, but not completely set up. For example, you may have created a new hire event, but you have not added a welcome message or the tasks for the employees to complete.

A pending event is completely set up, but the start date has not been reached.

To delete a new or pending event, do the following:

1. Point to **Configuration** and select **Set Up Employee Activities**.
2. In the **View** field, keep the selection as **Current**.
3. View the events, then click **Delete** to the right of the event you want to delete. The event must be listed as **New** or **Pending** in the **Status** column.
4. Click **OK** to confirm the deletion. This returns you to the updated Event List page.

Checking Which Employees Have Completed an Event

You can check which employees have completed the event and send an email reminder to those who have not.

You can also export the data to a .csv file for archiving and reporting.

1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, do one of the following:

- Select **Current** to view active events (events in progress for which an end date has not been reached).
- Select **History** to view expired events (events for which an end date has been reached).

3 View the events, then click **View Report** to the right of the event you want.

Note: If you do not see **View Report** next to a current event, that means the event has not been completely set up or the start date has not been reached. You can only view reports for current events that are listed as **Active** in the **Status** column.

4 In the **Status** field, make a selection.

5 Click **View**.

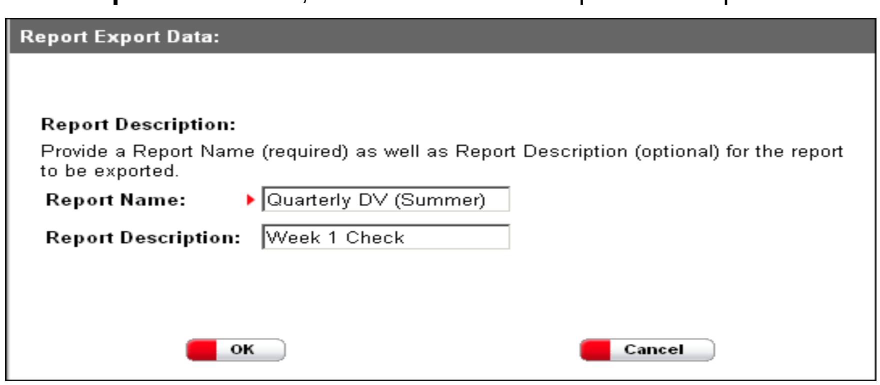
Result: Your search results are displayed on the bottom of the page.

Tip: Refer to the “View Event Reports” online help for more information about the totals provided in the reports. Click ? (**Help**) in the top-right corner of the page.

6 To export the data on this page to a .csv file, click **Export to .csv**. The Report Export Data dialog box displays.

Note: The exported data includes the status of all eligible employees. For example, if you choose to view which employees have completed a data verification event, the exported report will include the employees who have not started the event, the employees who are in the process of completing the event, and the employees who have completed the event.

7 In the **Report Name** field, enter a name for the report to be exported.



8 If desired, enter a description in the **Report Description** field.

9 Click **OK** to submit the data for the export.

10 Click **OK** to complete the export process.

11 To view the exported report or save it to a different location, refer to "Viewing or Saving Exported Reports" on page 137.

12 To delete the exported report, refer to "Deleting Exported Reports" on page 137.

Viewing or Saving Exported Reports

After you have exported a report to a .csv file, you can view the report or save it to another location that you specify. (For help creating a .csv file, refer to "Checking Which Employees Have Completed an Event" on page 136.)

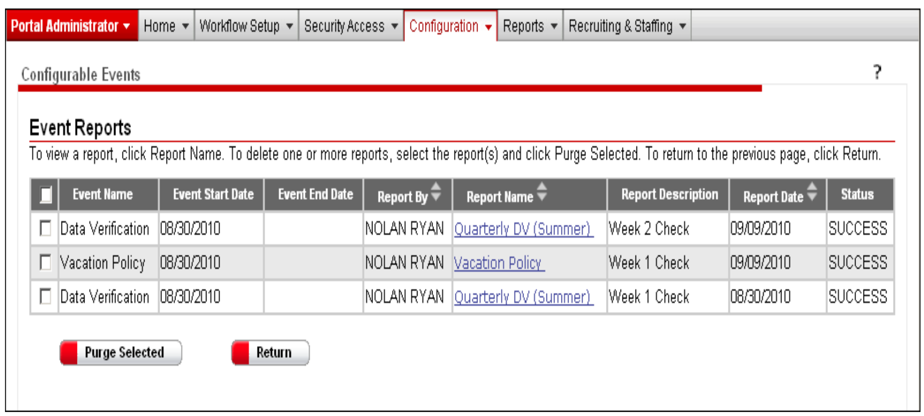
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, select **Current** or **History**.

3 Click **View Report** to the right of the event you want.

4 On the Event Report page, click **View Exported Reports**.

Result: All exported reports are displayed.



5 In the **Report Name** column, click the name of the report that you want. The File Download dialog box displays.

6 To view the file, click **Open**.

7 To save the file to a specified location, click **Save**.

Deleting Exported Reports

After you have exported a report to a .csv file, you can delete reports that you no longer need. (For help creating a .csv file, refer to "Checking Which Employees Have Completed an Event" on page 136.)

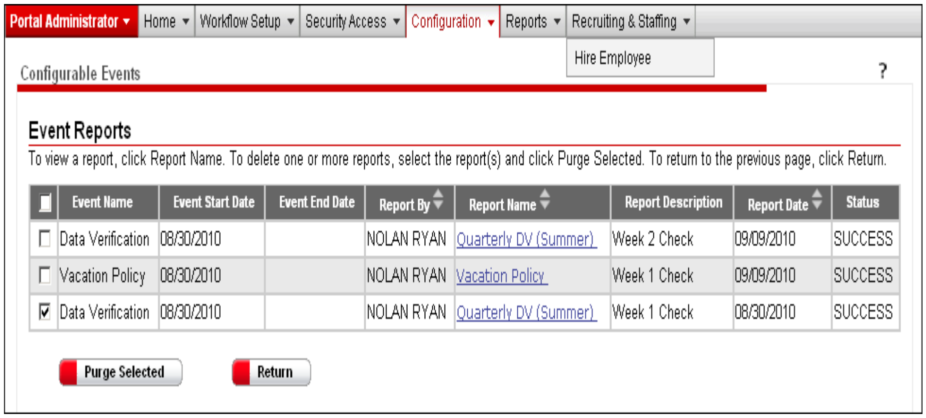
1 Point to **Configuration** and select **Set Up Employee Activities**.

2 In the **View** field, select **Current** or **History**.

3 Click **View Report** to the right of the event you want.

4 On the Event Report page, click **View Exported Reports**.

Result: All exported reports are displayed.



5 Click to select the check box next to the reports that you want to delete, and then click **Purge Selected**.

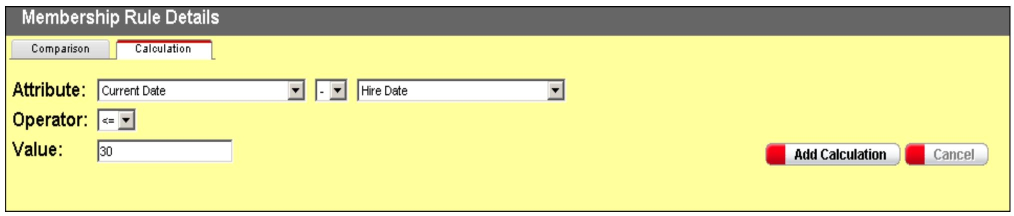
6 Click **OK** to confirm your action.

Frequently Asked Questions

Q: How can I distribute a new hire event only to new hires?

A: A new hire event can be distributed only to new hires by setting up a custom security group for these employees. When you create the new hire event, you choose to distribute it only to that security group. Custom security groups are added on the Security Groups page on the **Security Access** menu.

A membership rule can be used to further define the group. For example, your company may define new hires as those who have been employed by the company for 30 days or less. A rule can be added by creating this calculation statement:



After 30 days, employees will be removed from the group automatically.

For detailed instructions on setting up custom security groups and managing membership rules, refer to “Chapter 3: Setting User Access in ADP Workforce Now” in the *ADP Workforce Now® Security Guide*.

Q: Why haven’t employees received an event that I set up on the start date I provided?

A: You may not have clicked **Publish** after you created the event and added your content. You must click **Publish** in order for the event to be completely set up and for the selected employees to see the event in their activities list on the start date you provided.

You can check the status of your event on the Event List page. If the status is **New**, select the event, review the event details again to make sure they are correct, and click **Publish**.

Q: If I accidentally include a task in a new hire or data verification event that the selected employees do not have permission to view, will the employees be able to complete the event?

A: Yes. Employees who do not have permission to view a task that you included in an event will not receive the task.

Q: What happens if an employee updates information for a data verification event, but the employee recently updated this same information and submitted it for approval through a workflow event, and this change is still pending approval?

A: When the employee selects the task in the event (for example, a direct deposit task), the employee will see a message that says additional changes cannot be submitted until previous changes are approved. The same occurs when an employee logs onto ADP Workforce Now and navigates to the task independently.

Q: What happens to employees who are hired after a new hire event is rolled out? Will the event be sent to them?

A: Yes, new hires will receive the event, as long as the end date has not been reached. New hires are assigned to a security group, and ADP Workforce Now keeps track of who has been sent the event.

Tip: Do not enter an end date when you set up a new hire event. Doing so keeps the event active for all future new hires.

Q: How long does an event remain in an employee's activity list?

A: The event remains in the activity list until the employee completes the event or until the end date for the event, if you provided one, is reached.

Q: What happens if the end date for an event is reached and some employees have not completed all the tasks in the event?

A: *For employees:* The event is removed from their activities list. Employees can still complete the tasks that were included in the event on the appropriate pages in ADP Workforce Now.

For portal administrators: The event is moved from the Current list to the History list on the Event List page.

The report created for this event lists the status of the employees who have not completed all the tasks in the event as one of these:

- "Not yet started" - the employees have not started the event
- "In progress" - the employees have started the event, but not finished it

Tip: Do not enter an end date for a new hire event. Doing so will keep the event active for all new hires.

Q: How long will employees be prompted at logon for an event?

A: Employees will only be prompted at logon if you set up the event using that feature. The employees will continue to receive the prompt until they have completed all the required tasks in the event, or until an end date for the event - if you provided one - is reached.

Q: After I send an email notification, will I be informed if any emails were not delivered due to incorrect or invalid email addresses?

A: You can find out which email notifications were not delivered if you enter your real email address in the **From** field on the email notification setup page. You will then receive notifications about which emails were not delivered. email notifications go to an employee's security management address.

Tip: The number of email notifications that are not delivered can be reduced if employees keep their security management email address up to date. They can do this by clicking **Update My Security Profile** on the ADP Workforce Now logon page.

Q: What does the report for a new hire or data verification event tell me?

A: When you click **View Report** next to a new hire or data verification event on the Event List page, you see the following:

- Which employees have not started the event
- Which employees are in the process of completing the event
- Which employees have completed the event

An event is not considered completed until all the required tasks in it have been performed.

Chapter 6
Financial Tools in ADP Workforce Now

Depending on the products your company has purchased, you and your company's employees may be able to do the following on the **Pay & Taxes** menu:

- View pay statements and annual statement information
- Access calculators that can help you make important financial decisions

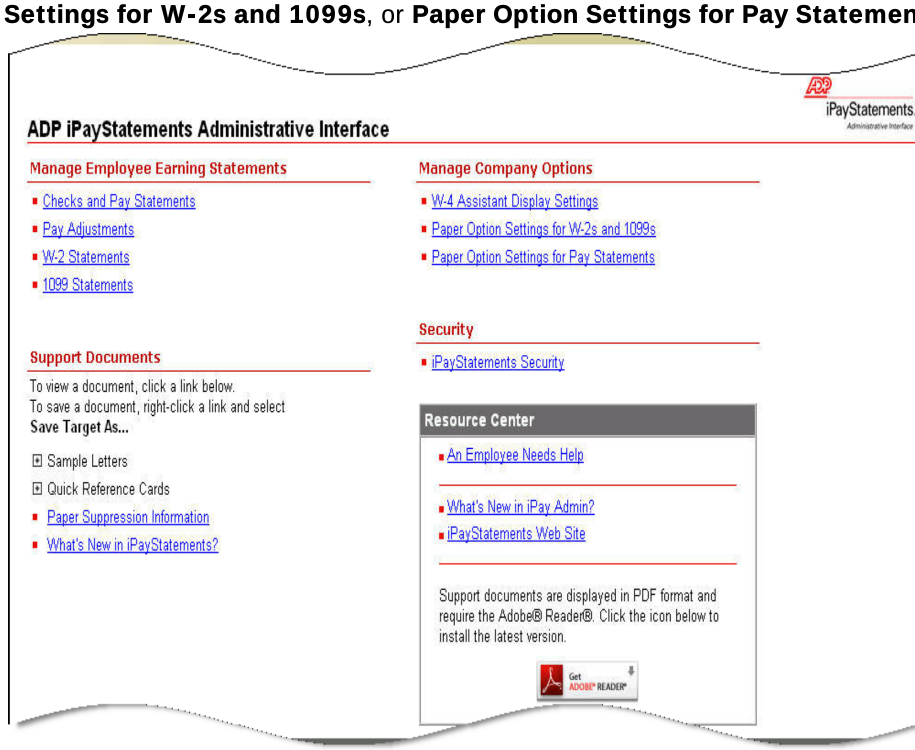
Note: You must be in the employee role to view this information.

As a portal administrator, you can manage whether or not employees receive paper statements and which financial calculators they can access.

Managing Paper Option Settings

To manage paper option settings in ADP Workforce Now, do the following:

1. Point to the Role Selector and select **Practitioner**.
2. On the **Payroll** menu, select **iPay Admin**.
3. In the **Manage Company Options** section of the page, click **Paper Option Settings for W-2s and 1099s**, or **Paper Option Settings for Pay Statements**.



4. Select **Employee Selectable** (employees can choose to go paperless), **Paper and Online** (employees receive both paper and online statements), or **Online Only** (employees receive only online statements) for the appropriate company code(s).

5 Click **Save**, and then click **Yes** and **OK** to confirm your action.

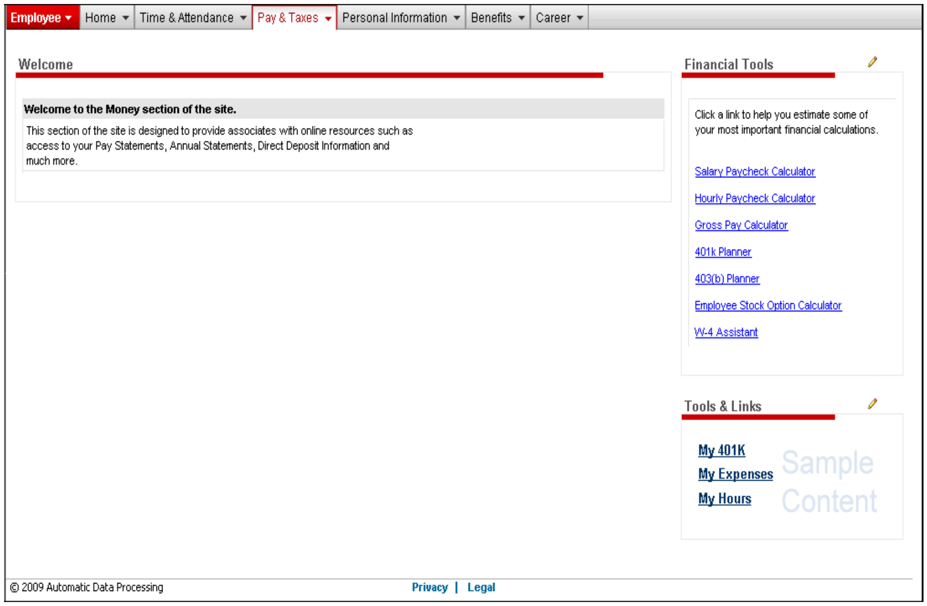
Setting Up Calculators

To choose which calculators you want your employees to view, do the following:

1 Point to the Role Selector and select **Employee**.

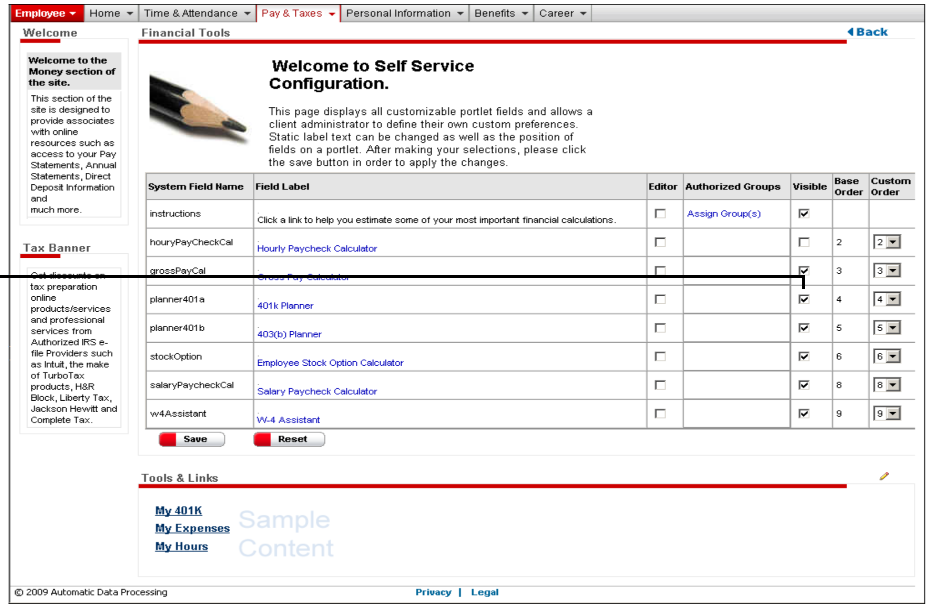
2 On the **Pay & Taxes** menu, select any menu item.

3 In the **Financial Tools** section of the page, click (**Configure**). Make sure you have clicked to select the **Edit page content** check box in the header at the top left of the site.



4 In the **Visible** column, click to select the check box for each calculator that you want to display.

Click to display the associated calculator.



Note: Although you can change the display settings of the W-4 Assistant calculator on the iPay Admin page, we recommend that you make your changes here.

5 When you are done, click **Save**.

Appendix: Adding Smart Links to ADP Workforce Now Pages

You can add links, or jumps, from one ADP Workforce Now® page directly to another ADP Workforce Now page. This allows you to add a “smart” link that the user can click to immediately access another ADP Workforce Now page.

Example 1:

On the Employee Home page, in the **News and Announcements** area, you have added information on a new policy allowing associates to have additional direct deposit accounts. You can add a link in the **News and Announcements** area that takes the user directly to their direct deposit summary information.

Example 2:

On the Employee Home page, in the **News and Announcements** area, you have important information on benefits. You can add a link in the **News and Announcements** area that takes the user directly to their benefits information.

You can also add a link within an email that allows the email recipient to click the link, and after successfully logging on, immediately access the ADP Workforce Now area defined in the link. This may be helpful when mass-mailing employees information on benefits enhancements, policy changes, and so forth. You can also add these links to email notifications that managers or practitioners are sent through workflow to notify them of action required or action taken.

Important: If a user does not have permission to view a linked page that you set up, the user will be directed to the first page of the first menu that is displayed when he or she clicks the smart link.

Adding smart links consists of the following tasks:

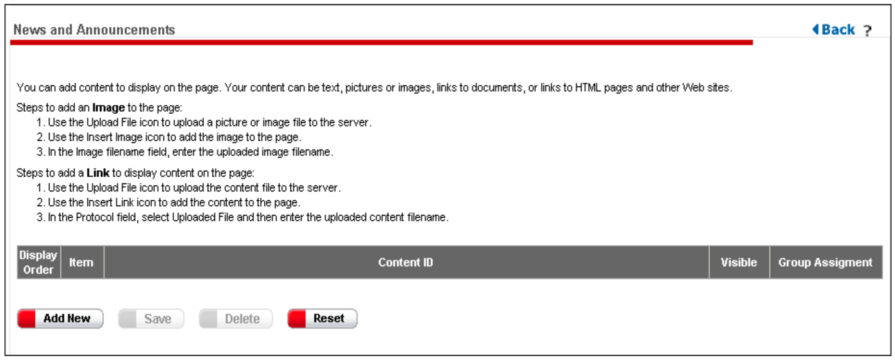
- Adding a link from one ADP Workforce Now page to another
- Adding a link from an email to an ADP Workforce Now page

Adding a Link from One ADP Workforce Now Page to Another

To add links, or jumps, from one ADP Workforce Now page directly to another ADP Workforce Now page, do the following:

1. Click to select the **Edit page content** check box in the banner at the top left of the site. **Configure** (pencil) icons display to indicate the areas you can customize.
2. Navigate to the area of the page where you want to add a smart link and click (**Configure**). The Configuration page for the selected page displays.

3 If you are adding a link to a Content Management area (which are most areas on the Welcome and Resources pages), click **Add New**.

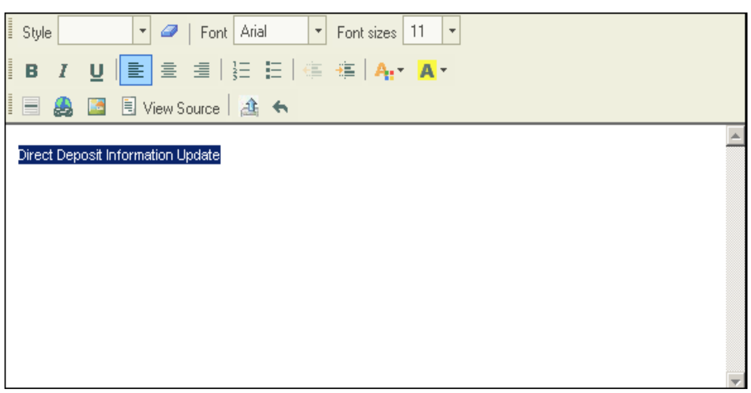


Result: The Editor toolbar displays. Enter a content ID for the link you are adding.

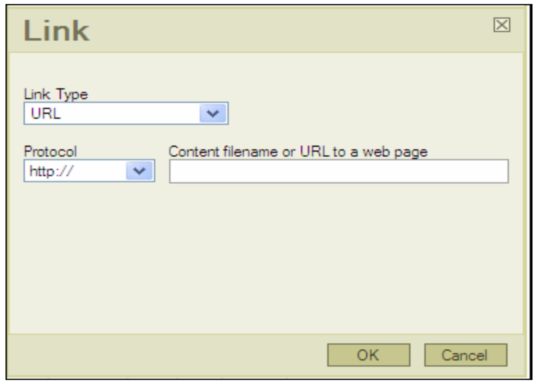
4 If you are adding a link to a Self Service Configuration area, locate the field in the **System Field Name** column where you want to add the link and click (**Editor**).

Result: The Editor toolbar displays.

5 Enter the text you want to attach the link to.



6 Highlight the text and click (**Insert Link**). The Link dialog box displays.



7 In the **Link Type** field, select **URL**.

8 In the **Content filename or URL** field, enter the URL for the page you want to link to. Be sure to enter it exactly as shown in Tables 1-4 that follow in this chapter.

9 Click **OK**. The link is added to the selected field.

> **Example:**
>
> If you wanted to link to the Direct Deposit summary page, you would enter the following in the **Content filename or URL** field:
>
> `/wps/myportal/Employee/PayTax/DirectDeposit`

10 When you have completed your changes, click **Save**.

- If you are adding a link to a Content Management area, click **Back**. You are returned to the refreshed area, which displays your changes.
- If you are adding a link to a Self Service Configuration area, you are immediately returned to the refreshed area after you click **Save**.

Adding a Link from an Email to an ADP Workforce Now Page

You can also add a link within an email that will allow the email recipient to click the link, and after successfully logging on, immediately access the ADP Workforce Now area defined in the link.

To add a link within an email to an ADP Workforce Now page, do the following:

1 Create your email. You can do one of the following:

- Compose your own external email.
- Use the email notifications available within ADP Workforce Now.

2 Add the appropriate smart link, in the following format:

https://portal.adp.com<*smart URL link*>

Important: Be sure to enter the smart URL link exactly as shown in Tables 1-4 that follow in this chapter.

Example:

If you wanted to link to the Direct Deposit summary page, you would type the following in your email:

https://portal.adp.com/wps/myportal/Employee/PayTax/DirectDeposit

When the recipient receives the email, he or she can click the link and once successfully logged on, immediately access the ADP Workforce Now area defined in the link.

The following tables detail the URL links that are available for the ADP Workforce Now pages. The tables are organized by role (employee, manager, practitioner, and administrator).

Important: Which features are available to you depends on the HR or Payroll services your company is using and how your company has been set up.

Table 1. URL Mapping for Employee Pages

ADP Workforce Now Menu	Option Page	URL
Home	**Welcome**	/wps/myportal/Employee/Home/Welcome
	Company Directory	/wps/myportal/Employee/Home/CompanyDirectory
	Message Center	/wps/myportal/Employee/Home/ApprovalsAndNotifications
	Approval History	/wps/myportal/Employee/Home/ApprovalHistory
	Resources	/wps/myportal/Employee/Home/Resources
	HR and Benefit Messages	/wps/myportal/Employee/Home/HRBenefitsMessages
	Company Directory (for HR & Benefits module)	/wps/myportal/Employee/Home/HRBCompanyDirectory
	My Tools	/wps/myportal/Employee/Home/MyTools
Time & Attendance	**My Time Card**	/wps/myportal/Employee/TimeAttendance/MyTimecard
	My Schedule	/wps/myportal/Employee/TimeAttendance/MySchedule
	My Attendance	/wps/myportal/Employee/TimeAttendance/MyAttendance
	My Accruals	/wps/myportal/Employee/TimeAttendance/MyAccurals
	My Information	/wps/myportal/Employee/TimeAttendance/MyInformation
	Time Off Summary	/wps/myportal/Employee/TimeAttendance/TimeOffSummary
	Enter Time Off	/wps/myportal/Employee/TimeAttendance/EnterTimeOff
	Cancel Time Off	/wps/myportal/Employee/TimeAttendance/CancelTimeOff
	Carry Time Off	/wps/myportal/Employee/TimeAttendance/CarryTimeOff
	Time-Off History	/wps/myportal/Employee/TimeAttendance/TimeOffHistory
	Team Calendar	/wps/myportal/Employee/TimeAttendance/TeamCalendar

Table 1. URL Mapping for Employee Pages (Continued)

ADP Workforce Now Menu	Option Page	URL
Pay & Taxes	Welcome	/wps/myportal/Employee/PayTax/Welcome
	Pay Statements	/wps/myportal/Employee/PayTax/PayStatements
	Pay Card	/wps/myportal/Employee/PayTax/PayCard
	Base Pay History	/wps/myportal/Employee/PayTax/BasePayHistory
	Direct Deposit	/wps/myportal/Employee/PayTax/DirectDeposit
	Tax Withholding	/wps/myportal/Employee/PayTax/TaxWithholding
	Annual Statements	/wps/myportal/Employee/PayTax/AnnualStatements
Personal Information	General (for Payroll module)	/wps/myportal/Employee/PersonalInformation/PayxGeneral
	General (for HR & Benefits module)	/wps/myportal/Employee/PersonalInformation/General
	Addresses	/wps/myportal/Employee/PersonalInformation/Addresses
	Dependent Information (for Payroll module)	/wps/myportal/Employee/PersonalInformation/ PayxDependentInformation
	Dependent Information (for HR & Benefits module)	/wps/myportal/Employee/PersonalInformation/ DependentInformation
	Emergency Contacts (for Payroll module)	/wps/myportal/Employee/PersonalInformation/ PayxEmergencyContacts
	Emergency Contacts (for HR & Benefits module)	/wps/myportal/Employee/PersonalInformation/ EmergencyContacts
	Citizenship Information	/wps/myportal/Employee/PersonalInformation/CitizenshipInformation
	Personal Custom Fields	/wps/myportal/Employee/PersonalInformation/PersonalCustomFields
	Phone Numbers	/wps/myportal/Employee/PersonalInformation/PhoneNumbers

Table 1. URL Mapping for Employee Pages (Continued)

ADP Workforce Now Menu	Option Page	URL
Benefits	**Compensation and Benefits**	/wps/myportal/Employee/Benefits/CompensationAndBenefits
	Pending Benefits Summary	/wps/myportal/Employee/Benefits/PendingBenefitsSummary
	Review/Change Benefits	/wps/myportal/Employee/Benefits/ChangeBenefits
	Review/Change Beneficiaries	/wps/myportal/Employee/Benefits/ChangeBeneficiaries
	Compare Plans	/wps/myportal/Employee/Benefits/ComparePlans
	Plan Details	/wps/myportal/Employee/Benefits/PlanDetails
	Life Events	/wps/myportal/Employee/Benefits/LifeEvents
	Benefits Summary	/wps/myportal/Employee/Benefits/BenefitsSummary
	Benefits Enrollment	/wps/myportal/Employee/Benefits/BenefitsEnrollment
	Personal Accrued Time	/wps/myportal/Employee/Benefits/PersonalAccruedTime
	Spending Accounts	/wps/myportal/Employee/Benefits/SpendingAccounts
Career	**Work Info**	/wps/myportal/Employee/Career/WorkInfo
	Performance Review	/wps/myportal/Employee/Career/PerformanceReview
	Talent	/wps/myportal/Employee/Career/Talent
	Work Custom Fields	/wps/myportal/Employee/Career/WorkCustomFields
	Job Profile	/wps/myportal/Employee/Career/JobProfile
	Career Profile	/wps/myportal/Employee/Career/CareerProfile

Table 2. URL Mapping for Manager Pages

ADP Workforce Now Menu	Option Page	URL
Home	**Welcome**	/wps/myportal/Manager/Home/Welcome
	Company Directory	/wps/myportal/Manager/Home/CompanyDirectory
	Message Center	/wps/myportal/Manager/Home/ApprovalsAndNotifications
	Approval History	/wps/myportal/Manager/Home/ApprovalHistory
	Resources	/wps/myportal/Manager/Home/Resources
	HR and Benefit Messages	/wps/myportal/Manager/Home/HRBenefitsMessages
	My Tools	/wps/myportal/Manager/Home/MyTools
Time & Attendance	**Home**	/wps/myportal/Manager/TimeAttendance/Home
	Timecards	/wps/myportal/Manager/TimeAttendance/Timecards
	Schedules	/wps/myportal/Manager/TimeAttendance/Schedules
	Employees	/wps/myportal/Manager/TimeAttendance/Employees
My Team	**Team Summary**	/wps/myportal/Manager/MyTeam/TeamSummary
	Hire Employee	/wps/myportal/Manager/MyTeam/HireEmployee
	Talent Search	/wps/myportal/Manager/MyTeam/TalentSearch
	Direct Reports	/wps/myportal/Manager/MyTeam/DirectReports
	Managing Work Events	/wps/myportal/Manager/MyTeam/ManagingWorkEvents
	Employee Career Profile	/wps/myportal/Manager/MyTeam/EmployeeCareerProfile
	Proxy Assignment	/wps/myportal/Manager/MyTeam/ProxyAssignment
	Performance Reviews	/wps/myportal/Manager/MyTeam/PerformanceReviews
Recruiting	**Recruiting - Search**	/wps/myportal/Manager/Recruiting/RecruitingSearch
	Application Management	/wps/myportal/Manager/Recruiting/ApplicationManagement
	Screening Settings	/wps/myportal/Manager/Recruiting/ScreeningSettings
	Resource Library	/wps/myportal/Manager/Recruiting/ResourceLibrary
Reports	**HR & Benefits Reports Management**	/wps/myportal/Manager/Reports/HRBenefitsReportsManagement
	HR & Benefits Reports Bin	/wps/myportal/Manager/Reports/HRBenefitsReportsBin
	Time & Attendance Reports	/wps/myportal/Manager/Reports/TimeAttendanceReports

Table 3. URL Mapping for Practitioner Pages

ADP Workforce Now Menu	Option Page	URL
Home	**Welcome**	/wps/myportal/Practitioner/Home/Welcome
	Administrator Resources	/wps/myportal/Practitioner/Home/AdministratorResources
	Company Directory	/wps/myportal/Practitioner/Home/CompanyDirectory
	Message Center	/wps/myportal/Practitioner/Home/ApprovalsAndNotifications
	Approval History	/wps/myportal/Practitioner/Home/ApprovalHistory
	Manage Approval History	/wps/myportal/Practitioner/Home/ManageApprovalHistory
	Manage Active Workflow	/wps/myportal/Practitioner/Home/ManageActiveWorkflow
	Resources	/wps/myportal/Practitioner/Home/Resources
	Administrator Tools	/wps/myportal/Practitioner/Home/AdministratorTools
HR & Benefits	**Home**	/wps/myportal/Practitioner/HRBenefits/Home
	Company	/wps/myportal/Practitioner/HRBenefits/Company
	Benefits	/wps/myportal/Practitioner/HRBenefits/Benefits
	Employee	/wps/myportal/Practitioner/HRBenefits/Employee
	Time Off	/wps/myportal/Practitioner/HRBenefits/TimeOff
	HR	/wps/myportal/Practitioner/HRBenefits/HR
	Invoice	/wps/myportal/Practitioner/HRBenefits/Invoice
	Billing	/wps/myportal/Practitioner/HRBenefits/Billing
	Import	/wps/myportal/Practitioner/HRBenefits/Import
	Exchange	/wps/myportal/Practitioner/HRBenefits/Exchange
	Connections	/wps/myportal/Practitioner/HRBenefits/Connections
	Integrations	/wps/myportal/Practitioner/HRBenefits/Integration
	E-Access	/wps/myportal/Practitioner/HRBenefits/EAccess
	Rights	/wps/myportal/Practitioner/HRBenefits/HRAndBenefitsRights

Table 3. URL Mapping for Practitioner Pages (Continued)

ADP Workforce Now Menu	Option Page	URL
Payroll **(for Payroll module)**	**Home**	/wps/myportal/Practitioner/Payroll/Home
	Employee	/wps/myportal/Practitioner/Payroll/Employee
	Payroll	/wps/myportal/Practitioner/Payroll/Payroll
	Utilities	/wps/myportal/Practitioner/Payroll/Utilities
	Setup	/wps/myportal/Practitioner/Payroll/Setup
	Total Pay iNet	/wps/myportal/Practitioner/Payroll/TotalPayiNet
	General Ledger Interface	/wps/myportal/Practitioner/Payroll/GeneralLedgerInterface
	Welcome Center	/wps/myportal/Practitioner/Payroll/WelcomeCenter
	Pay Card	/wps/myportal/Practitioner/Payroll/PayCard
	iPay Admin	/wps/myportal/Practitioner/Payroll/iPayAdmin
Time & Attendance	**Home**	/wps/myportal/Practitioner/TimeAttendance/Home
	Timecards	/wps/myportal/Practitioner/TimeAttendance/Timecards
	Recurring Schedules	/wps/myportal/Practitioner/TimeAttendance/RecurringSchedules
	End of Period	/wps/myportal/Practitioner/TimeAttendance/EndofPeriod
	Setup	/wps/myportal/Practitioner/TimeAttendance/Setup
	Maintenance	/wps/myportal/Practitioner/TimeAttendance/Maintenance

Table 3. URL Mapping for Practitioner Pages (Continued)

ADP Workforce Now Menu	Option Page	URL
Recruiting & Staffing	**Search**	/wps/myportal/Practitioner/RecruitingStaffing/Search
	Application Management	/wps/myportal/Practitioner/RecruitingStaffing/ApplicationManagement
	Postings	/wps/myportal/Practitioner/RecruitingStaffing/Postings
	Status	/wps/myportal/Practitioner/RecruitingStaffing/Status
	Communications	/wps/myportal/Practitioner/RecruitingStaffing/Communication
	Settings	/wps/myportal/Practitioner/RecruitingStaffing/Settings
	Screening	/wps/myportal/Practitioner/RecruitingStaffing/Screening
	Resource Library	/wps/myportal/Practitioner/RecruitingStaffing/ResourceLibrary
	Welcome	/wps/myportal/Practitioner/RecruitingStaffing/Welcome
	Background Check	/wps/myportal/Practitioner/RecruitingStaffing/BackgroundCheck
	Tax Credit Services	/wps/myportal/Practitioner/RecruitingStaffing/TaxCreditScreening
	Employment Eligibility eI9	/wps/myportal/Practitioner/RecruitingStaffing/EmploymentEligibilityEI9
Reports	**HR & Benefits Reports**	/wps/myportal/Practitioner/Reports/HRBenefitsReports
	Payroll Reports	/wps/myportal/Practitioner/Reports/PayrollReports
	Time & Attendance Reports	/wps/myportal/Practitioner/Reports/TimeAttendanceReports
	ADP Reporting	/wps/myportal/Practitioner/Reports/ADPReporting
	iReports	/wps/myportal/Practitioner/Reports/Ireports
	Payroll Preview	/wps/myportal/Practitioner/Reports/PayrollPreview
	DocuMax-CDROM	/wps/myportal/Practitioner/Reports/DocuMaxCDROM

Table 4. URL Mapping for Administrator Pages

ADP Workforce Now	Option Page	URL
Home	**Welcome**	/wps/myportal/Administrator/Home/Welcome
	Administrator Resources	/wps/myportal/Administrator/Home/AdministratorResources
	Company Directory	/wps/myportal/Administrator/Home/CompanyDirectory
	Message Center	/wps/myportal/Administrator/Home/ApprovalsAndNotifications
	Approval History	/wps/myportal/Administrator/Home/ApprovalHistory
	Manage Approval History	/wps/myportal/Administrator/Home/ManageApprovalHistory
	Manage Active Workflow	/wps/myportal/Administrator/Home/ManageActiveWorkflow
	Resources	/wps/myportal/Administrator/Home/Resources
	Administrator Tools	/wps/myportal/Administrator/Home/AdministratorTools
Workflow Setup	**Work Group Definition**	/wps/myportal/Administrator/WorkflowSetup/WorkgroupDefinition
	Membership Rules	/wps/myportal/Administrator/WorkflowSetup/MembershipRules
	Workflow Path Definition	/wps/myportal/Administrator/WorkflowSetup/ApprovalPathDefinition
	Business Rules	/wps/myportal/Administrator/WorkflowSetup/BusinessRules
	Email Setup	/wps/myportal/Administrator/WorkflowSetup/EmailSetup
	Event Workflow	/wps/myportal/Administrator/WorkflowSetup/EventWorkflow
Security Access	**Security Groups**	/wps/myportal/Administrator/SecurityAccess/SecurityGroups
	Membership Rules	/wps/myportal/Administrator/SecurityAccess/MembershipRules
	View User	/wps/myportal/Administrator/SecurityAccess/ViewUser
Configuration	**Company Directory**	/wps/myportal/Administrator/Configuration/CompanyDirectory
	Customize Theme	/wps/myportal/Administrator/Configuration/ThemeConfiguration
	Set Up Employee Activities	/wps/myportal/Administrator/Configuration/EventConfiguration
Reports	**Policy Acknowledgement**	/wps/myportal/Administrator/Reports/PolicyAcknowledgement
	Audit Trail for Past Policies	/wps/myportal/Administrator/Reports/AuditTrailforPastPolicies