



ADP Workforce Now™ Portal Administrator Guide

Version 1.2

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Contents

Introduction	v
About This Guide	v
Types of Users	v
Security Groups	v
Navigating the Site	vi
Where to Find Training and Help	vi
Importance of Logging Off	vii
 Chapter 1	
Customizing Your Site	1
Customizing the Welcome and Resources Pages	2
Adding Content	2
Adding Smart Links	7
Updating Content	8
Changing the Display Order of Content	9
Removing Sample Content	10
Hiding Portlets from View	12
Customizing Your Site Theme	13
Selecting a Standard Theme	14
Creating a Custom Theme	14
Assigning Custom Themes to Security Groups	17
 Chapter 2	
Managing Approvals and Notifications	19
Simple and Complex Workflows	19
Creating a Simple Workflow	20
Example of a Simple Workflow	20
Verifying the Event	20
Creating a Work Group	21
Selecting an Approval Path	22
Assigning the Approval Path to the Workflow	24
Creating a Complex Workflow	25
Example of a Complex Workflow	25
Verifying the Event	26
Creating a Work Group	26
Selecting an Approval Path	29

Adding a Business Rule	31
Assigning the Business Rule to the Workflow	34
Setting Up E-Mail Notification	35
Assigning the Approval Path to the Workflow	38
Managing Events	40
Checking the Status of an Event	40
Deleting an Event	40
Recalling an Event	41
Approving or Rejecting an Event	41
Managing Approval History	43
Viewing All Pending or Completed Events	43
Exporting Approval History	44
Purging Completed Approval History	46
Viewing and Deleting Submitted Jobs	48
Managing Active Workflow	49
Rerouting a Pending Step	49
Cancelling an Event	52
Changing or Deleting a Work Group	54
Changing a Work Group	54
Deleting a Work Group	56
Changing or Deleting an Approval Path	57
Changing or Deleting a Business Rule	58
Changing a Business Rule	58
Deleting a Business Rule	58
 Chapter 3	
Managing Your Company Directory	61
Quick Search	62
Advanced Search	63
Working with Individual Contacts	64
Adding a Contact to Your Directory	64
Editing a Contact in Your Directory	65
Deleting a Contact from Your Directory	68
Working with .CSV Files	70
Importing a Directory File	70
Exporting Your Directory File	72

Chapter 4

Managing Company Policies	73
Process for Distributing a New Policy.	73
Setting Up a Company Policy	74
What to Do Next	76
Setting Up a Company Policy Event	77
Creating the Event	77
Adding the Content	79
What You Can Change	84
Notifying Employees of a Company Policy	85
Changing a Policy	87
Deleting a Policy	89
Stopping an Active Event.	90
What Happens After You Stop an Event.	90
How to Stop an Event	90
Deleting a New or Pending Event	91
Checking Which Employees Have Completed an Event	92
Frequently Asked Questions	94

Chapter 5

Financial Tools in ADP Workforce Now	97
Managing Paper Option Settings	97
Setting Up Calculators	98
Appendix: Adding Smart Links to ADP Workforce Now Pages	101
Adding a Link from One ADP Workforce Now Page to Another	110
Adding a Link from an E-mail to an ADP Workforce Now Page.	113

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 has purchased.

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.

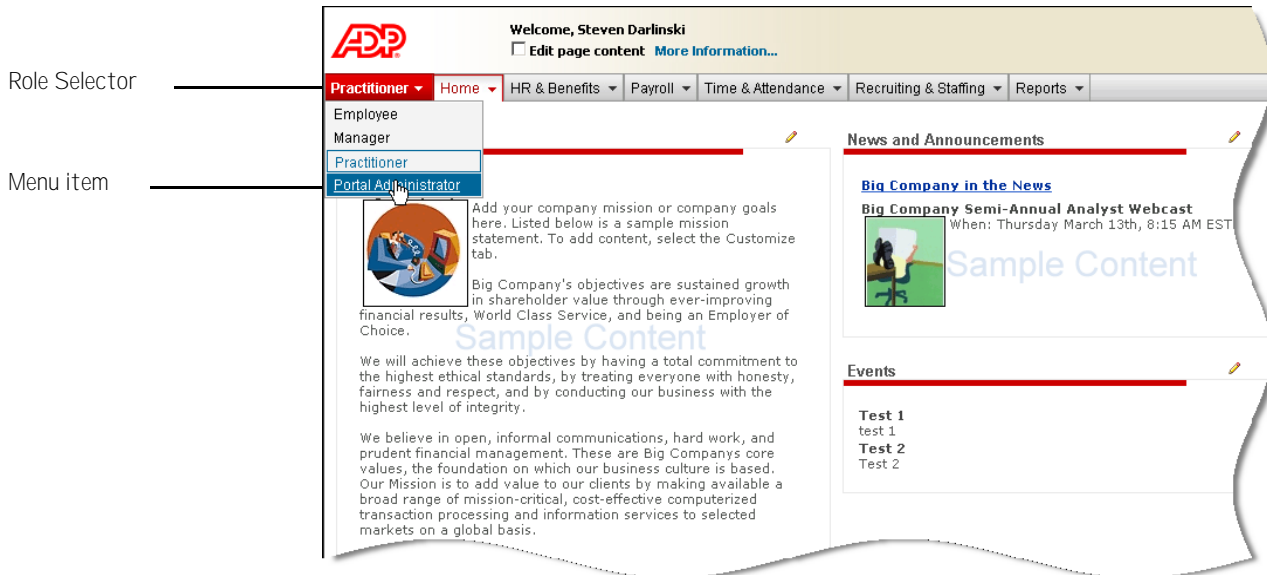
Security Groups

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.

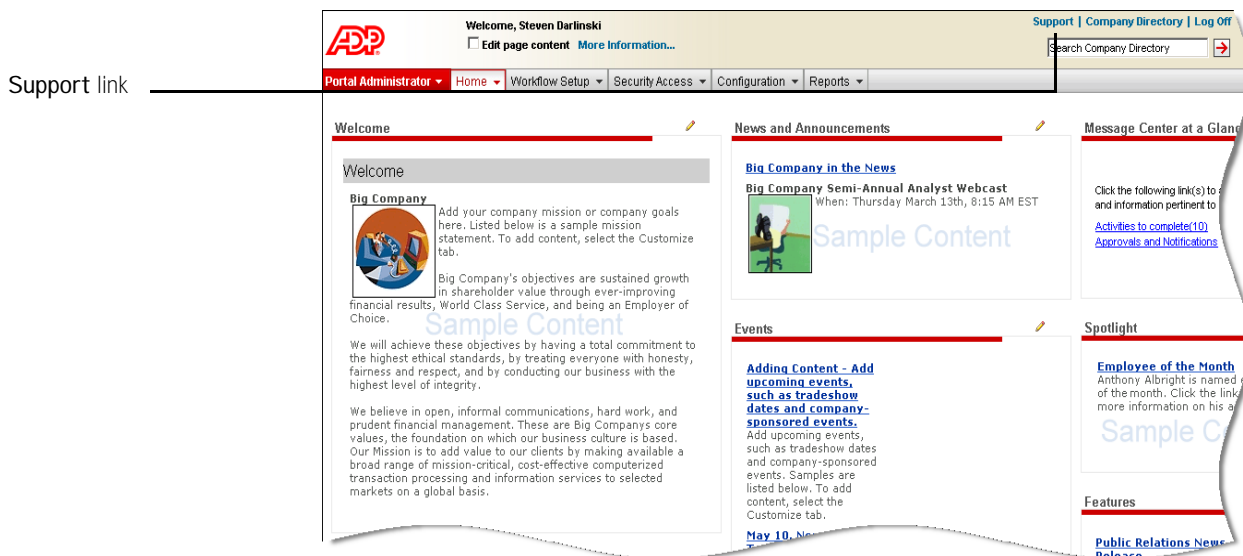
Navigating the Site

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.



Where to Find Training and Help

You can access portal administrator training by clicking the **Support** 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.

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, graphics, and links. You can further customize the site by updating your logo, or 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, graphics, and links to the Welcome and Resources pages, where employees look for important information such as your 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 logo.

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.

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.

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 the sample content and decide what information your company wants to display. When you customize the pages with your own information, the sample content disappears. You can customize all sections of pages that have the pencil icon displayed.

Important: Whenever you customize content on the site, click to select the **Edit page content** check box in the banner at the top left of the site so that you can view all content that your employees may see.

Adding Content

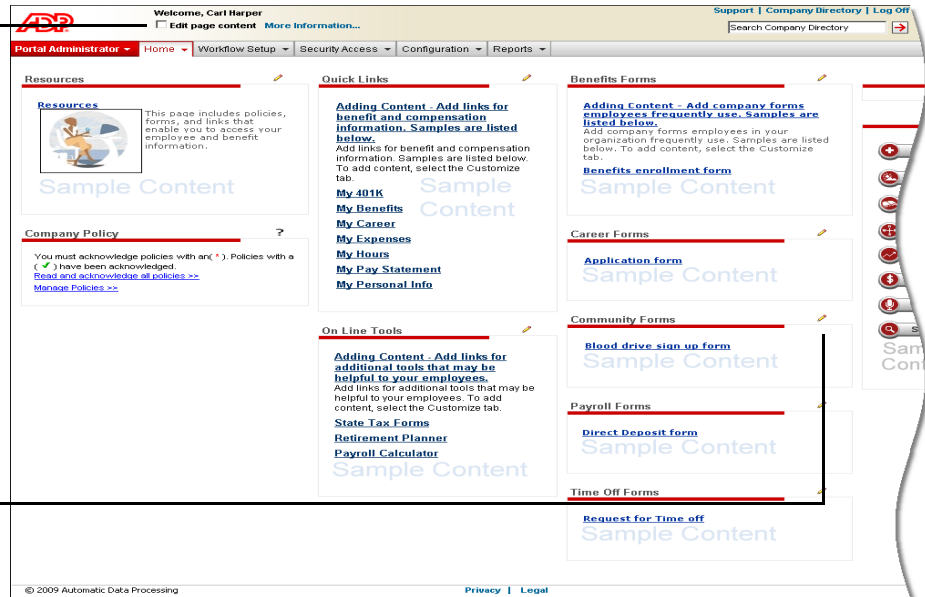
The content items you can add include text, graphics, and links to documents or other web sites. How much content you can add to a page section depends on the section you choose. When adding content, try not to overload your site with graphics. Too many graphics can clutter your site and slow it down.

To add a content item, do the following:

- 1 Point to **Home** and select **Welcome** or **Resources**.
- 2 Click the pencil icon in the section of the page where you want to add content.

Make sure this is checked so you can view all content on your site.

Edit tool on the Resources page



3 Click **Add New Item**.

The screenshot displays the ADP Workforce Now Portal Administrator interface. The top navigation bar includes links for Support, Company Directory, and Log Off, along with a search bar. The main content area is divided into several sections:

- Links:** Contains instructions on adding links for benefit and compensation information, with a list of sample links like My 401K, My Benefits, My Career, My Expenses, My Hours, My Pay Statement, and My Personal Info.
- Benefits Forms:** Includes instructions on adding company forms frequently used by employees, with a sample form titled 'Benefits enrollment form'.
- Career Forms:** Includes an 'Application form' sample.
- Community Forms:** Features a 'Managing Your Content' section with instructions on how to manage content items, including adding new items, editing, deleting, and adding supporting files. Below this is a table with columns: Display Order, Content Item, Shown/Hidden, Type, and Group Assignment. The 'Add New Item' button is highlighted in this section.
- Payroll Forms:** Includes a 'Direct Deposit form' sample.
- Time Off Forms:** Includes a 'Request for Time off' sample.

A red line and an arrow point from the text 'Add New Item button' to the 'Add New Item' button in the Community Forms section.

- 4 Enter a heading and, if necessary, a description. Headings and descriptions can include letters, numbers, and special characters. Headings must be unique.
- The maximum character length for a heading is 100.
 - The maximum character length for a description is 3700.

The screenshot displays the ADP Workforce Now Portal Administrator interface. The top navigation bar includes links for Support, Company Directory, and Log Off, along with a search bar. The main content area is divided into several sections:

- Quick Links:** Contains instructions for adding content for benefit and compensation information, with links to My 401K, My Benefits, My Career, My Expenses, My Hours, My Pay Statement, and My Personal Info.
- On Line Tools:** Contains instructions for adding content for additional tools, with links to State Tax Forms, Retirement Planner, and Payroll Calculator.
- Benefits Forms:** The active section, showing instructions for adding content for benefits forms, with a link to Benefits enrollment form.
- Career Forms:** Contains instructions for adding content for career forms, with a link to Application form.
- Community Forms:** Contains instructions for adding content for community forms, with a link to Blood Drive Sign-Up Form.
- Payroll Forms:** Contains instructions for adding content for payroll forms, with a link to Direct Deposit form.
- Time Off Forms:** Contains instructions for adding content for time off forms, with a link to Request for Time off.

The 'Add Content' form for 'Benefits Forms' is shown, with fields for Heading, Description, and Document/Picture. The form includes instructions for adding content, such as 'Adding Text to Your Intranet Site' and 'Adding a Link to a Document/Picture'. The form also includes a 'Show this content on the intranet site' checkbox and a 'Save' button.

- 5 To format the heading and description text, click the **Editor** check box next to the associated field. Then highlight the text you want to format, and then use the toolbar icons to change the appearance of the text.

For example, click **B** to change the heading text style to bold. **Tip:** Place your cursor over the icons to see what actions they perform.

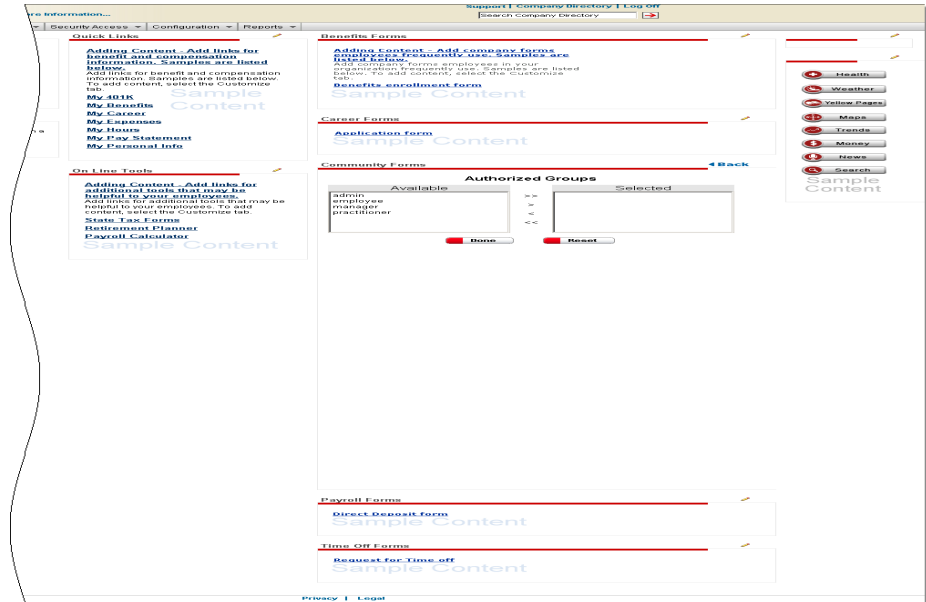
- 6 To link your heading to a document or picture, select **Document/Picture**, then click **Browse** to find the file. The maximum file size for documents and pictures is 5 megabytes.

- Document files can be in DOC, TXT, PDF, XLS, HTML, PPT, JPG, JPEG, GIF, and BMP format.
- Document files *cannot* be in EXE, COM, JSP, TAR, WAR, or ZIP format.
- Pictures must be in JPG, JPEG, or GIF format.

Note: If you have the option of adding a thumbnail picture to your page section, you must provide it in JPG, JPEG, or GIF format. The maximum file size is 5 megabytes. Thumbnail pictures are resized at 110 pixels by 110 pixels after you upload them, which may change their appearance. If you have the option of linking to a web site, you must keep "http://" before the address. The maximum character length for URLs is 128.

- 7 Click to select the check box next to **Show this content on the intranet site** if you want to show the content now.

- 8 To assign your content to a security group, click the **Assign to Security Group(s)** link at the bottom of the page. Then in the **Authorized 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) into the **Selected** area. When you are finished, click **Done**.



Note: Content that you do not assign to specific security groups becomes visible to all users. For more information about setting up security groups, refer to the *ADP Workforce Now™ Security Guide*.

- 9 When you are finished making all of your changes to your page section, scroll down the page and click **Save**.
- 10 If you selected to display the content now, you can confirm your changes by clicking **Back** in the page section. Your changes will be displayed.
- 11 To add another item to this page section, click **OK**.

Note: If you are uploading a banner ad, the maximum size of the banner ad that you can provide is 5 megabytes. Banner ads are resized at 110 pixels by 110 pixels after you upload them, which may change their appearance.

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 e-mail to help the e-mail 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 101](#).) 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 the pencil icon in the section of the page where you want to update content.
- 3 Click the content item you want to update, and then click **Edit**.

Support | Company Directory | Log Off

Access ▾ | Configuration ▾ | Reports ▾

Search Company Directory 🔍

Links

Adding Content - Add links for benefit and compensation information. Samples are listed below.

Sample Content

My 401K
My Benefits
My Career
My Expenses
My Hours
My Pay Statement
My Personal Info

On Line Tools

Adding Content - Add links for additional tools that may be helpful to your employees. Add links for additional tools that may be helpful to your employees. To add content, select the Customize tab.

State Tax Forms
Retirement Planner
Payroll Calculator

Sample Content

Benefits Forms

Adding Content - Add company forms employees frequently use. Samples are listed below.

Sample Content

Benefits enrollment form

Career Forms

Application form

Sample Content

Community Forms 4 Back

Managing Your Content

Do any of the following:

- To change or delete content, select the button next to the heading, and click Edit or Delete.
- To show or hide content, select the button next to the heading and click Edit.
- To add new content, click Add New Item.
- To add supporting files for your Web document, select the button next to heading and click Add Supporting Files.
- To view the link for a content item, click the heading of the content item.
- To change the order of content, select the button next to the heading and click ▲ or ▼.

Display Order	Content Item	Shown/Hidden	Type	Group Assignment
1 ▲	Blood Drive Sign-Up Form	Shown	DOC	All Groups
2 ○	Walk for Heart Health Sign-Up Form	Shown	DOC	All Groups
3 ○	Lunch and Learn Sign-Up Form	Shown	DOC	All Groups

Add New Item Edit Delete Add Supporting File Save Reset Cancel

Payroll Forms

Direct Deposit form

Sample Content

Time Off Forms

Request for Time off

Sample Content

Privacy | Legal

Health
Weather
Yellow Pages
Maps
Trends
Money
News
Search
Sample Content

4 Update your content as necessary.

In this example, a description is added.

- 5 When you are finished, scroll down the page and click **Update**.
- 6 If you selected to display the content now, you can confirm your changes by clicking **Back** in the page section. Your changes will be displayed.
- 7 To add another item to this page section, click **OK**.

Changing the Display Order of Content

When you add new content to a page section, that content is displayed below the existing content in the section. To change the display order of content in that section, do the following:

- 1 Point to **Home** and select **Welcome** or **Resources**.
- 2 Click the pencil icon in the section of the page where you want to change the order of content.

- 3 Click the content item you want to move. Then click ▲ or ▼ to move the item up or down in the **Display Order** list.

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

The screenshot shows the 'Managing Your Content' section of the ADP Workforce Now portal administrator interface. The interface includes a sidebar with navigation links, a main content area with various form categories, and a 'Managing Your Content' table with columns for Display Order, Content Item, Shown/Hidden, Type, and Group Assignment. The table lists three items: Blood Drive Sign-Up Form, Walk for Heart Health Sign-Up Form, and Lunch and Learn Sign-Up Form. Arrows are shown next to the Display Order numbers to indicate movement.

Display Order	Content Item	Shown/Hidden	Type	Group Assignment
1 ▲	Blood Drive Sign-Up Form	Shown	DOC	All Groups
2 ▼	Walk for Heart Health Sign-Up Form	Shown	DOC	All Groups
3 ▼	Lunch and Learn Sign-Up Form	Shown	DOC	All Groups

- 4 When you are finished, click **Save**.

Removing Sample Content

If you do not have content ready to display in a portlet and you prefer that the sample content not be displayed, you can replace the sample content with a blank graphic. To add a blank graphic, you can create a white box using a graphics tool, such as Microsoft® Paint. Then add the white box to the appropriate portlet.

- 1 Point to **Home** and select **Welcome** or **Resources**.
- 2 Click the pencil icon in the section of the page where you want to add your graphic.
- 3 Click **Add New Item**.

4 Enter the appropriate information.

Enter a heading and, if necessary, a description.

Upload your graphic.

Choose to display the content now.

5 Click **Save**.6 Confirm your changes by clicking **Back** in the page section.

Result: Your changes are displayed.

In this example, sample content has been replaced with an announcement.

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**.

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

Default text color and background color in header

Default Role Selector design

Default border color in page section (portlet)

The screenshot displays the 'Theme Configuration' page for the ADP Classic Theme. The page is part of the 'Portal Administrator' interface, which includes a top navigation bar with links like 'Support', 'Company Directory', and 'Log Off'. The main content area is titled 'Theme Configuration' and contains a message: 'To change your default theme, select a new theme from the Theme Name menu and click to select the Default Theme checkbox.' Below this, there are three tabs: 'Header', 'Role Selector', and 'Portlets'. The 'Header' tab is active, showing settings for 'Text Color' (set to #000000), 'Background Color' (set to #E6E6CE), and 'Logo Image' (set to adp_red.gif). There is also an 'Upload' button for the logo. A preview of the theme is shown on the right, with a red arrow pointing to the header section. Below the preview, there is a description: 'The header section of this custom theme prominently displays the client logo and contains text that clearly identifies the authenticated users. Quick Search allows users to perform searches of the employee directory. Additional buttons exist that allow users to obtain assistance as well as logging out of the portal.' At the bottom of the page, there are 'Save', 'Cancel', and 'Save As' buttons.

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 **Theme Configuration**.
- 2 Do the following:

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

If you want this theme to be your 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**.
- 3 Enter a unique name for your new theme, and then click **OK** to confirm your action. 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 Customize your header.

Choose a text color and background color by clicking the color box to the right of each field.


The screenshot shows the 'Theme Configuration' page in the ADP Portal Administrator. The page has a navigation bar with 'Portal Administrator' selected, and sub-menus for 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The 'Configuration' menu is expanded, showing 'Theme Configuration' as the active page. The page title is 'Theme Configuration' with a help icon. Below the title, there is a instruction: 'To change your default theme, select a new theme from the Theme Name menu and click to select the Default Theme checkbox.' The 'Theme Name' is set to 'My Theme' and the 'Default Theme' checkbox is checked. There is a link 'Assign Security Groups'. Below this, there are three tabs: 'Header', 'Role Selector', and 'Portlets'. The 'Header' tab is active. It contains three fields: 'Text Color' with value '#000066' and a color box, 'Background Color' with value '#CCCCCC' and a color box, and 'Logo Image' with value 'adp_red.gif' and an 'Upload' button. A note states 'Maximum logo size is 150 wide X 45 high'. To the right of these fields is a preview of the header section of the custom theme, showing the ADP logo and some text. Below the preview, there is a description: 'The header section of this custom theme prominently displays the client logo and contains text that clearly identifies the authenticated users. Quick Search allows users to perform searches of the employee directory. Additional buttons exist that allow users to obtain assistance as well as logging out of the portal.' At the bottom of the form are five buttons: 'Save', 'Reset', 'Cancel', 'Save As', and 'Delete'. The footer of the page shows '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

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**.

The screenshot shows a color selection interface. It features a 10x10 grid of color swatches. Below the grid, there are two input fields: 'Act: #CCFF00' and 'Sel: #FFFFFF'. Below these fields are two more input fields: one with '#FFFFFF' and another with 'Set Color'. At the bottom, there is a dropdown menu labeled 'set color by name'.

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

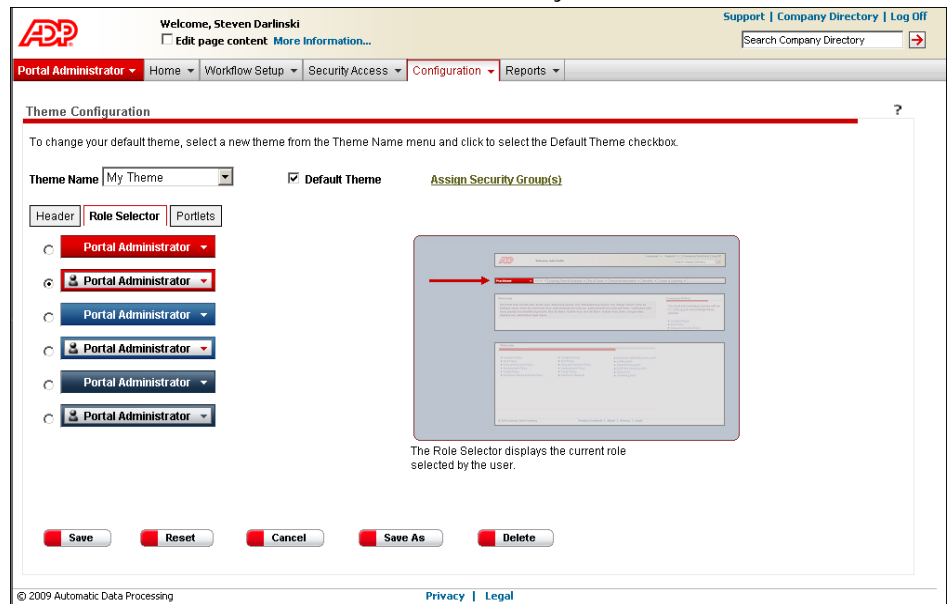
Click the browse button in order to select a file off your local disk that is to be uploaded to the portal server for use within the custom theme.



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

Important: Your logo must be sized at 150 width x 45 height pixels prior to upload. You can use Microsoft® Picture Manager or Paint to resize. Acceptable formats are BMP, JPG, JPEG, GIF, and PNG. No spaces or special characters should be included in the filename.

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



ADP Welcome, Steven Darlinski
 Edit page content More Information...
 Support | Company Directory | Log Off
 Search Company Directory

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Theme Configuration ?

To change your default theme, select a new theme from the Theme Name menu and click to select the Default Theme checkbox.

Theme Name My Theme ☒ Default Theme [Assign Security Group\(s\)](#)

Header Role Selector Portlets

Portal Administrator
 Portal Administrator
 Portal Administrator
 Portal Administrator
 Portal Administrator
 Portal Administrator

The Role Selector displays the current role selected by the user.

Save Reset Cancel Save As Delete

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- 11 On the **Portlets** tab, customize your page sections (portlets) by choosing a bar color and button style.

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

Theme Configuration

To change your default theme, select a new theme from the Theme Name menu and click to select the Default Theme checkbox.

Theme Name: My Theme ☒ Default Theme [Assign Security Group\(s\)](#)

Header | Role Selector | **Portlets**

Background Color: #00008B

Button Style: ☒ Light Blue ☐ Default

The portlet section of the custom theme is responsible for wrapping portlet content. Each portlet will be wrapped in what is known as a skin. This skin contains the title of each portlet as well as buttons that perform specific functions.

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- 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)**.

Theme Configuration

To change your default theme, select a new theme from the Theme Name menu and click to select the Default Theme checkbox.

Theme Name: My Theme ☒ Default Theme [Assign Security Group\(s\)](#)

Header | Role Selector | Portlets

Text Color: #000066

Background Color: #CCCCCC

Logo Image: adp_red.gif

The header section of this custom theme prominently displays the client logo and contains text that clearly identifies the authenticated users. Quick Search allows users to perform searches of the employee directory. Additional buttons exist that allow users to obtain assistance as well as logging out of the portal.

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- 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.

The screenshot shows a user interface for selecting security groups. It features two main columns: 'Available' on the left and 'Selected' on the right. The 'Available' column contains a list of security groups: 'admin', 'Temporary Employees', 'employee', 'manager', 'Terminated Employees', 'practitioner', and 'Time and Attendance'. Between the two columns are four directional buttons: '>>', '>', '<', and '<<'. The 'Selected' column is currently empty. At the bottom of the interface are two buttons: 'Done' and 'Reset'.

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

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

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 (approval 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.
- **Approval path** - the route that the workflow follows. An approval 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. Approval paths are assigned to workflows.
- **Proxy** - the person who approves an event in the absence of the designated approver.
- **Event-specific e-mail notification** - an e-mail for a specific event that is sent to users in an approval path.
- **Business rules** - used to create exceptions to an approval path. Business rules are assigned to workflows.

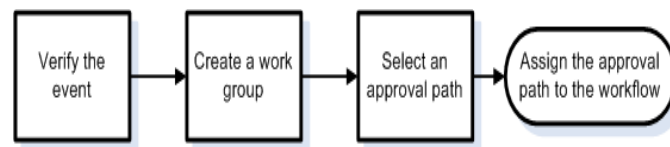
Note: Depending on how your company is set up, you may be using additional types of workflows. For more information on additional workflows, see the *HR & Benefits Implementation Guide* located on the Support Center.

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 approval 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 an approval path that includes two payroll practitioners. 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**.

<div> Welcome, Carl Harper </div> <div> <input type="checkbox"/> Edit page content More Information... </div> <div> Support Company Directory Log Off </div> <div> <input type="text" value="Search Company Directory"/> <input type="button" value="➔"/> </div>		
<div> Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾ </div>		
<div> Event Workflow ? </div>		
This page displays the default workflow processing by event. To change an events workflow or exception processing, click the underlined event identifier of the event being changed.		
Event Name	Description	Approval Path
<u>Employee Event - Address</u>	Address Update	none
<u>Employee Event - Dependents</u>	Dependent Insert/Update/Delete	none
<u>Employee Event - Direct Deposit</u>	Direct Deposit Insert/Update/Delete	none
<u>Employee Event - Education</u>	Education Insert/Update/Delete	none
<u>Employee Event - Emergency Contacts</u>	Emergency Contacts Insert/Update/Delete	none
<u>Employee Event - License/Certificate</u>	License/Certificate Insert/Update/Delete	none
<u>Employee Event - Memberships</u>	Membership Insert/Update/Delete	none
<u>Employee Event - Phone Numbers</u>	Phone Number Insert/Update/Delete	none
<u>Employee Event - Previous Employer</u>	Previous Employer Insert/Update/Delete	none
<u>Employee Event - Skills</u>	Skill Insert/Update/Delete	none
<u>Employee Event - Tax Withholding</u>	Tax Withholding Insert/Update	none
<u>Manager Event - Education</u>	Education Insert/Update/Delete for employee	none
<u>Manager Event - License and Certificates</u>	License/Certificate Insert/Update/Delete for employee	none
<u>Manager Event - Memberships</u>	Memberships Insert/Update/Delete for employee	none
<u>Manager Event - Performance Reviews</u>	Performance Reviews	none
<u>Manager Event - Previous Employer</u>	Previous Employer Insert/Update/Delete for employee	none
<u>Manager Event - Skills</u>	Skill Insert/Update/Delete for employee	none
<u>WorkEvent-Employment Status Change</u>	WorkEvent-Employment Status Change	none
<u>WorkEvent-Job and Salary Change</u>	WorkEvent-Job and Salary Change	none
<u>WorkEvent-Transfer</u>	WorkEvent-Transfer	none

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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, either by creating rules or adding members individually, you define the members who will be in it. 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**, and then click **Add New**.

ADP Portal Administrator interface showing the 'Work Group Definition' page. The page title is 'Work Group Definition'. Below the title, there is a message: 'To view or change a group, click the Group Name. If you need additional Work groups, click **Add New**.' A table lists existing work groups:

Work Group Name	Description
Direct Deposit Admins	Direct Deposit Admins
HR Administrators	Human Resources Administrators
HR Managers	Human Resources Managers
Jim Roberts	Marketing Director
Joan Welsh	HR Director
New Group	Descriptive Name
Payroll Administrators	
Payroll Admins	Payroll Administrators
Tax HR Admin	Tax HR Admins
test 1	test 1
Top guy	Top guy

Buttons: **Add New** (top right), **Delete** (bottom left).

- 2 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. Payroll administrators act as practitioners.

ADP Portal Administrator interface showing the 'Work Group Definition' page with the 'Rules' tab selected. The 'Work Group Name' is 'Payroll Admins' and the 'Group Description' is 'Payroll Administrators'. Below the tabs, there is a message: 'Select the applicable rules for this group. The selected rules will determine the members belonging to this group.' A table lists membership rules:

Rule Name	Rule Description	Rule Details
FTE60	Full time employees employed 60 days or more	(null - null) >= 60
HR Administrators	Human Resources Administrators	Employment Status Equals a
Temporary Employee Benefits	Do not show benefits	Regular or Temporary Equals t
Terminated Employees Pay and Taxes Tab	Only show pay statements on Pay and Taxes tab	Employment Status Equals t

Buttons: **Add Rule** (bottom left), **Save Group** (bottom center), **Delete Group** (bottom center), **Cancel** (bottom right).

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.

- 3 Select the **Members** tab to add members manually.
- 4 Click **Add Members**.
- 5 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 practitioner users are added to the Payroll Admins work group.

The screenshot shows the ADP Portal Administrator interface. The top navigation bar includes 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The main content area is titled 'Work Group Definition' and shows the 'Payroll Admins' work group. The 'Members' tab is active, displaying a list of users with checkboxes for selection. Two users, 'Practitioner, John' and 'Practitioner, Jane', are selected. The 'Done' button is highlighted.

First Name	Last Name	Department #	Job	Location
Practitioner	John	013000	Administ	
Practitioner	Jane	005000	ANALYST	
Smith2	John			

- 6 When you are finished, click **Done**.
- 7 Click **Save Group**.

Selecting an Approval Path

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

- 1 Point to **Workflow Setup** and select **Approval Path Definition**.
- 2 Click **Add New Process**.
- 3 Enter an approval path name and description. Click **Add Step**.

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

4 In the **Navigation** area, do the following:

- Select the direction you want the step to follow.
- Indicate to where this step will be routed.
- Indicate whether the step is an approval or a notification.

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

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

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

Assigning the Approval Path to the Workflow

To complete the workflow, you need to assign the approval 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 **Workflow Path** field, select the approval path that you want associated with the event.

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

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Portal Administrator | Home | Workflow Setup | Security Access | Configuration | Reports

Event Workflow

The event workflow page establishes default workflow processing by event. Click Save to save your changes.

Event Name: Employee Event - Direct Deposit

Proxy Assignment: One Level Up

Maximum of days: 10

Reject Policy: Send task back to originator

☐ Do not send Notification email

Workflow path: Payroll Admins

If there are any exceptions to the standard workflow path enter them below and associate each exception with a workflow path. There are unlimited rules that can be associated with any given event, to add an additional rule click Add Exception. To delete a rule from this event click Delete Exception.

Business Rule	Process Definition Name	Delete Exception
---------------	-------------------------	------------------

Save Add Exception Cancel Reset

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

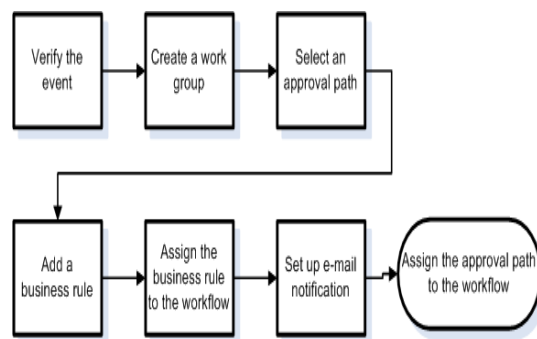
Creating a Complex Workflow

A complex workflow includes the tasks involved in setting up a simple workflow, but it can also include other tasks such as creating a group membership rule, creating a business rule, changing proxy information, and setting up e-mail notification.

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 practitioner 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 approval 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**.

Event Name	Description	Approval Path
Employee Event - Address	Address Update	none
Employee Event - Dependents	Dependent Insert/Update/Delete	none
Employee Event - Direct Deposit	Direct Deposit Insert/Update/Delete	none
Employee Event - Education	Education Insert/Update/Delete	none
Employee Event - Emergency Contacts	Emergency Contacts Insert/Update/Delete	none
Employee Event - License/Certificate	License/Certificate Insert/Update/Delete	none
Employee Event - Memberships	Membership Insert/Update/Delete	none
Employee Event - Phone Numbers	Phone Number Insert/Update/Delete	none
Employee Event - Previous Employer	Previous Employer Insert/Update/Delete	none
Employee Event - Skills	Skill Insert/Update/Delete	none
Employee Event - Tax Withholding	Tax Withholding Insert/Update	none
Manager Event - Education	Education Insert/Update/Delete for employee	none
Manager Event - License and Certificates	License/Certificate Insert/Update/Delete for employee	none
Manager Event - Memberships	Memberships Insert/Update/Delete for employee	none
Manager Event - Performance Reviews	Performance Reviews	none
Manager Event - Previous Employer	Previous Employer Insert/Update/Delete for employee	none
Manager Event - Skills	Skill Insert/Update/Delete for employee	none
WorkEvent-Employment Status Change	WorkEvent-Employment Status Change	none
WorkEvent-Job and Salary Change	WorkEvent-Job and Salary Change	none
WorkEvent-Transfer	WorkEvent-Transfer	none

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 practitioners and one for the HR managers who are responsible for the employee's department (Department 100000). The Payroll Admins 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.

Work Group Definition

Work Group Name: Group Description:

Rules Members

Select the applicable rules for this group. The selected rules will determine the members belonging to this group.

Rule Name	Rule Description	Rule Details
<input type="checkbox"/> HR Administrators	Human Resources Administrators	Employment Status Equals a
<input type="checkbox"/> Temporary Employee Benefits	Do not show benefits	Regular or Temporary Equals t
<input type="checkbox"/> Terminated Employees Pay and Taxes Tab	Only show pay statements on Pay and Taxes tab	Employment Status Equals t
<input type="checkbox"/> Time and Attendance Supervisor	Time and Attendance Supervisor	Time and Attendance Supervisor Equals Y

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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**.

6 Enter a rule name and description.

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

Membership Rule Details

Rule Name: Rule Description:

Comparison Calculation

Attribute: Operator: Value:

Rule Preview

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

Note: For more information about choosing attributes and values, click [?](#) (Help) in the top-right corner of the page.

- 8 Click **Add Comparison**.
- 9 At the bottom of the page, in the **Rule Preview** area, verify the first part of the rule.

If you need to make changes, click the pencil icon to edit a rule statement, the arrow icon to add a row, and the x icon to delete a row.

The screenshot shows the ADP Portal Administrator interface. The top navigation bar includes 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The main content area is titled 'Membership Rules' and shows a rule for 'HR Managers' with the description 'Human Resources Managers'. The rule statement is 'Department = 100000'. Below this, there is a section for 'ADD a Comparison / Calculation' with 'AND' and 'OR' operators. The 'Rule Preview' section shows 'Department = 100000'. At the bottom, there are 'Save', 'Delete', and 'Cancel' buttons.

- 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.

The screenshot shows the ADP Portal Administrator interface. The top navigation bar includes 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The main content area is titled 'Membership Rules' and shows a rule for 'HR Managers' with the description 'Human Resources Managers'. The rule statement is 'Department = 100000'. Below this, there is a section for 'ADD a Comparison / Calculation' with 'AND' and 'OR' operators. The 'Rule Preview' section shows 'Department = 100000 AND'. At the bottom, there are 'Save', 'Delete', and 'Cancel' buttons.

13 Click **Add Comparison**.

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

If you need to make changes, click the pencil icon to edit a rule statement, the arrow icon to add a row, and the x icon to delete a row.

Tip: 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**.

Result: A list of users who meet the rule's criteria is generated. You can also view these users by pointing to **Workflow Setup** and selecting **Work Group Definition**, and then selecting the **Members** tab.

Selecting an Approval Path

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

- 1 Point to **Workflow Setup** and select **Approval Path Definition**.
- 2 Click **Add New Process**.

3 Enter an approval path name and description.

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

4 Add the two approval path steps in the order that the event should be routed. To add Step 1, click **Add Step**.

5 In the **Navigation** area, do the following:

- Select the direction you want the step to follow.
- Indicate to where this step will be routed.
- Indicate 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 Admins work group for their approval.

6 Add Step 2 by clicking **Add Step**.

7 In the **Navigation** area, do the following:

- Select the direction you want the step to follow.
- Indicate to where this step will be routed.
- Indicate 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.

The screenshot shows the 'Approval Path Definition' page in the ADP Portal Administrator. The page has a header with the ADP logo, user name 'Steven Darlinski', and links for 'Support', 'Company Directory', and 'Log Off'. Below the header is a navigation menu with 'Portal Administrator' selected. The main content area is titled 'Approval Path Definition' and contains a table for defining approval steps. The table has four columns: 'Direction', 'Step', 'Action', and 'Delete Step'. There are two rows of steps defined. The second row is highlighted, and an annotation points to the 'Direction' dropdown menu, which is set to 'Workgroup'. The 'Step' dropdown is set to 'HR Managers', and the 'Action' dropdown is set to 'Approval'.

Direction	Step	Action	Delete Step
Workgroup	Payroll Admins	Approval	Delete
Workgroup	HR Managers	Approval	Delete

Buttons at the bottom: Save, Cancel, Reset, Add Step.

Note: You can add as many steps to an approval path as you need. However, certain directions must follow a sequence. For example, a step up can't follow a specific user or a work group step. Also, if you are using multiple work group steps, the group names must be different for each step. For more information, click [?](#) (Help) in the top-right corner of the page.

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

Adding a Business Rule

A business rule is used to create an exception for an approval workflow path. In our example, we need to create a business rule that states that federal exemptions greater than 10 require HR manager approval.

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

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.

The screenshot shows the ADP Business Rules page. At the top, there's a navigation bar with 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. Below this, the 'Business Rules' section is active. It includes a search bar with 'Description' and 'Event Type' fields, and a 'Find' button. A table lists two rules:

Rule Identifier	Description	Script
ZIP Code Change	ZIP Code Change	- (New Postal/ZIP Change)
State Change	State Change	- (New State/Prov Change)

Below the table is an 'Add New' button. The footer shows '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

3 In the **Event Type** field, select the event for which you need a business rule.

In our example, we need to select **Employee Event - Tax Withholding**.

The screenshot shows the ADP Business Rules page with the 'Event Type' dropdown menu open. The menu lists various event types, and 'Employee Event - Tax Withholding' is highlighted. The 'Cancel' button is visible next to the dropdown. The footer shows '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

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

In our example, the business name and description define the exception to the standard approval path for the tax withholding event.

- 5 In the **Business Rule Definition** area, determine whether you need to define your business rule by adding a comparison, a calculation, or an action. In our example, we want to create a comparison variable.

In our example, we need to compare the federal tax exemption value to greater than 10.

- 6 Click **Add Comparison** at the right of the **Business Rule Definition** area.
- 7 Review your business rule, and if no more changes are needed, click **Save**.


Note: You can test the business rule by adding it to an approval path and conducting the associated event.

Other Business Rule Definitions

A *calculation variable* is used to define calculation logic. For example, if an employee's current salary plus a proposed pay increase exceeds a certain amount, 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.

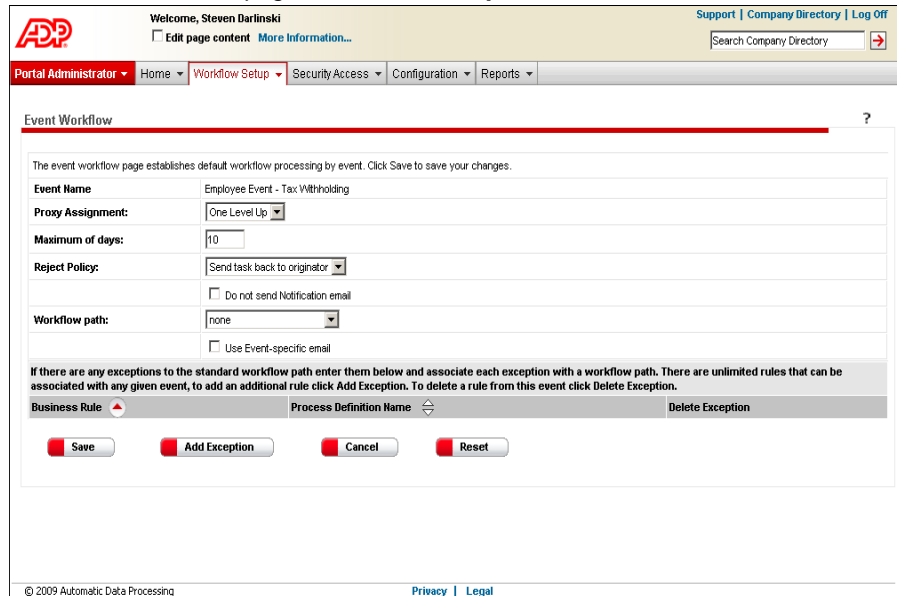
Note: This type of event is available if your company uses the HR module.

For more information about business rule definitions, click  **(Help)** in the top-right corner of the page.

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 **Add Exception**.



ADP Welcome, Steven Darlinski Support | Company Directory | Log Off
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Portal Administrator Home Workflow Setup Security Access Configuration Reports

Event Workflow ?

The event workflow page establishes default workflow processing by event. Click Save to save your changes.

Event Name: Employee Event - Tax Withholding

Proxy Assignment: One Level Up

Maximum of days: 10

Reject Policy: Send task back to originator

☐ Do not send Notification email

Workflow path: none

☐ Use Event-specific email

If there are any exceptions to the standard workflow path enter them below and associate each exception with a workflow path. There are unlimited rules that can be associated with any given event, to add an additional rule click Add Exception. To delete a rule from this event click Delete Exception.

Business Rule	Process Definition Name	Delete Exception

Save Add Exception Cancel Reset

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4 Select the appropriate business rule and approval path.

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

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

Setting Up E-Mail Notification

In ADP Workforce Now, you can set up e-mail notification for a workflow to notify users of action required or taken. Notifications are especially helpful if users do not check their Approvals and Notifications page on a regular basis.

You can set up global e-mails and event-specific e-mails. Global e-mails apply to all events and are sent automatically when the event occurs. For example, a global e-mail can be sent to users in an approval path to notify them that an employee event has been submitted and requires their attention. Another global e-mail can be sent to employees to confirm that an event they submitted was approved.

Note: You can choose not to send global Assignment Notification e-mails by deselecting the option on the Event Workflow page. All other global notifications that you set up are sent automatically when the event occurs.

Example of a Global E-mail

ADP

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[→](#)

Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾

Email Setup

This page defines the email body, subject line and sender's email address. Click Save to save your changes.

Type Name: Assignment Notification

From Address: manager@companyx.com

Subject Line: Assignment Notification

Email Body:

Email Text:

Dear Manager,

You have a request for (EVENT) for (EMPLOYEE_NAME), submitted on (SUBMITTED_DATE), that requires your attention.

This e-mail has been sent by an automated system. PLEASE DO NOT REPLY.

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An event-specific e-mail is used for a specific event and is only sent if you select **Use Event-specific email** on the Event Workflow page. This e-mail is sent to users in an approval path. An example is a direct deposit event. 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 e-mail that lets the assigned approver know a direct deposit event has been submitted and requires a timely response.

Note: When you choose to send an event-specific e-mail, that e-mail is sent to approvers in place of the global Assignment Notification e-mail.

Example of an Event-Specific E-mail

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Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾

Email Setup

This page defines the email body, subject line and sender's email address. Click Save to save your changes.

Type Name: Employee Event - Direct Deposit

From Address: manager@companyx.com

Subject Line: Direct Deposit Update

EMail Body:

Dear Manager,

A direct deposit update submitted by (EMPLOYEE_NAME) on (SUBMITTED_DATE) requires your prompt attention. Thank you for responding.

EMail Text : **This e-mail has been sent by an automated system. PLEASE DO NOT REPLY.**

[Save](#) [Reset](#) [Cancel](#)

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To set up an e-mail notification, do the following:

- 1 Point to **Workflow Setup** and select **Email Setup**.
- 2 Global e-mails are listed in the **Email Type** area of the page. Event-specific e-mails are listed in the **Event Specific Email Templates** area right below it. Click the type of e-mail you want to set up.

In our complex workflow example, we can set up a global Assignment Notification e-mail.

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[Edit page content](#) [More Information...](#)

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Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾

Email Setup

Click the appropriate underlined email type to view or update email text and subject lines.

Email Type	Subject
Approved Notification to requestor	
Assignment Notification	
Cancel Event Notification	
Proxy Assignment	
Recall Notification	
Rejection notification to requestor	
Reroute Notification	
Event Specific Email Templates	
Employee Event - Address	
Employee Event - Dependents	
Employee Event - Direct Deposit	
Employee Event - Education	
Employee Event - Emergency Contacts	
Employee Event - License/Certificate	
Employee Event - Memberships	
Employee Event - Phone Numbers	
Employee Event - Previous Employer	
Employee Event - Skills	
Employee Event - Tax Withholding	
Employment Status Change	
Job And Salary Change	
Manager Event - Education	
Manager Event - License and Certificates	
Manager Event - Memberships	
Manager Event - Performance Reviews	
Manager Event - Previous Employer	
Manager Event - Skills	
Transfer	

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- 3 On the **Email Setup** detail page, enter appropriate information in the **From Address** field, **Subject Line** field, and **Email Text** box. You must enter information in all three places. In the **Email Text** box, use the following variables to personalize the text.

To Display	Include This Variable in the E-Mail Text
The name of the event	{EVENT}
The event originator's name	{NAME}
The associated employee's name	{EMPLOYEE_NAME}
The date the event was initiated	{SUBMITTED_DATE}
The number of records reassigned to a new approver when an event is rerouted (used only in the Reroute Notification e-mail)	{NUMBER_OF_RECORDS}

In our example, the subject line describes the event.

Variables are included for the name of the event, the associated employee's name, and the date the event was initiated.

The screenshot shows the 'Email Setup' page in the ADP Portal Administrator interface. The page has a header with the ADP logo, user name 'Steven Darlinski', and navigation links like 'Support', 'Company Directory', and 'Log Off'. Below the header is a navigation bar with 'Portal Administrator' and several menu items: 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The main content area is titled 'Email Setup' and includes a sub-header 'This page defines the email body, subject line and sender's email address. Click Save to save your changes.' The form contains the following fields: 'Type Name' (Assignment Notification), 'From Address' (manager@companyx.com), 'Subject Line' (Assignment Notification), and a large text area for 'Email Body' containing a personalized message with variables like {EVENT}, {EMPLOYEE_NAME}, and {SUBMITTED_DATE}. At the bottom of the form are 'Save', 'Reset', and 'Cancel' buttons.

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

Assigning the Approval Path to the Workflow

To complete the workflow, you need to assign the approval path to the workflow. You can also choose to change the proxy, the maximum number of calendar days before the event is rerouted to the proxy, and e-mail notification.

- 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 Do the following:

- Select a proxy assignment. This assignment is used by default when the manager does not have a proxy assigned and no action has been taken on a workflow task. Only one manager proxy and one default proxy are allowed per event.
- Select the maximum number of calendar days that can pass before the task is rerouted to the proxy.
- In the **Workflow path** field, select the approval path you want associated with the event.
- Select if you want to use an event-specific e-mail notice. In our example, we created one, so to use it we want to click to select the check box.

In our example, we need to select **1 Up and HR Approval**.

Event Workflow

The event workflow page establishes default workflow processing by event. Click Save to save your changes.

Event Name: Employee Event - Tax Withholding

Proxy Assignment: One Level Up

Maximum of days: 7

Reject Policy: Send task back to originator

☐ Do not send Notification email

Workflow path: 1 Up and HR Approval

☒ Use Event-specific email

If there are any exceptions to the standard workflow path enter them below and associate each exception with a workflow path. There are unlimited rules that can be associated with any given event, to add an additional rule click Add Exception. To delete a rule from this event click Delete Exception.

1 Found Rows per Page: 50

Business Rule	Process Definition Name	Delete Exception
Federal Exemptions > 10	1 Up HR Approval	Delete Exception

Save Add Exception Cancel Reset

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Important: The maximum number of days in the proxy assignment is not absolute because the activity monitor, which triggers the proxy assignment, runs once a day at 1:00 a.m. system time. For example, if a user submits an event on Tuesday at 1:00 p.m. and the number of days before the event gets rerouted to the proxy is defined as 2, the event will not be rerouted until 1:00 a.m. on Friday morning.

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

Managing Events

Checking the Status of an Event

You can check the status of any event you initiated or received for approval.

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

Click the up and down arrows in the column headings to sort columns in ascending or descending order.

Your events are displayed here.

Approval History ?							
For details of an approval click the appropriate task description. Click Delete to remove an approval from your Approval History. Click Recall to stop a submitted event.							
10 Found							
Event Name	Employee Name/Worksheet ID	Originator Name	Last Action Date	Effective Date	View History	Status	Action
Multiple	Sarah Price	Elizabeth Johnson	07/24/2009 14:26:51	08/15/2009		In Progress	
Multiple	Multiple	Elizabeth Johnson	08/09/2009 01:00:35	10/15/2009		In Progress	
Employee Event - Skills	Sarah Price	Sarah Price	07/28/2009 17:52:58		View	In Progress	
Employee Event - License/Certificate	Marcia McMann	Marcia McMann	07/23/2009 11:39:20		View	Recalled	Delete
Manager Event - Licenses/Certificates	Joshua Daniels	Paul Franklin	07/31/2009 15:13:25		View	Recalled	Delete
Manager Event - Licenses/Certificates	Deborah Clinkscales	Paul Franklin	07/31/2009 15:45:02		View	Cancelled	Delete
Manager Event - Licenses/Certificates	Trevor Sawyer	Elizabeth Johnson	07/24/2009 15:22:23		View	In Progress	Recall
Manager Event - Licenses/Certificates	Randall Eldridge	Elizabeth Johnson	07/24/2009 15:32:33		View	In Progress	Recall
Manager Event - Licenses/Certificates	Joshua Daniels	Paul Franklin	07/31/2009 15:00:11		View	Recalled	Delete

- 2 Confirm changes to an event by clicking the event name.
- 3 See the progress that an event has made along its approval path by clicking **View** next to the event.

Note: For bundled (multiple) events, click the event name, then click **View** next to each individual event in the bundle.

Deleting an Event

You can remove completed events from your approval history. Completed events include events that have been completed, rejected, recalled, or cancelled.

Note: If you need to delete a large amount of events, use the Manage Approval History page.

- 1 Point to **Home** and select **Approval History**.
- 2 Click **Delete** next to the event you want to remove. A confirmation message is displayed.
- 3 Click **OK**. You are returned to the updated Approval History page.

Note: For bundled (multiple) events, click the event name, then click **Delete** next to each individual event in the bundle that you want to remove.

Recalling an Event

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

- 1 Point to **Home** and select **Approval History**.
- 2 Click **Recall** next to the event you want to recall. A confirmation message is displayed.

Note: For bundled (multiple) events, click the event name. Click **Recall** next to each individual event in the bundle that you want to recall. Click **Recall All** to recall the entire bundle of events.

- 3 Click **OK**. You are returned to the updated Approval History page, where you now view the status of your event as recalled.

Note: If you set up a global Recall Notification e-mail, this notification is now sent to prior and pending approvers in the associated approval path. Pending users are users who currently have the event assigned to them for approval. If the prior approver was a member of a work group, only that specific member who approved the step receives the notification. If the pending approver is a work group, all members of the work group receive the notification. Future approvers in the approval path do not receive any notification.

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 **Approvals and Notifications**.

The default selection is **Approvals**.

Employee users will not see any events to be approved because they don't approve events. Manager users will see events that they need to approve. Once events are completed or rejected, they are removed from this page.

The screenshot shows the ADP Portal Administrator web application. The top navigation bar includes the ADP logo, a welcome message for Carl Harper, and links for 'Edit page content' and 'More Information...'. A search bar for the 'Company Directory' is also present. The main navigation menu has options: 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The 'Approvals and Notifications' section is active, showing a sub-header with a help icon. Below this, there is a section titled 'Approvals and Notifications' with a description: 'Select Activities to view events requiring immediate attention. Select Approvals to view events requiring action. Select Notifications to view events when action is not needed. To take action on an event or to view details of a notification, click the underlined event name. Click Delete to remove a notification from your list.' There are three radio buttons: 'Approvals' (selected), 'Notifications', and 'Activities'. Below the radio buttons is a table titled 'Approvals' with columns: 'Event Name', 'Employee Name/Worksheet ID', 'Originator Name', 'Date Submitted', 'Effective Date', 'View History', and 'Status'. The table is currently empty. At the bottom of the page, there is a copyright notice '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

- 2 In the **Approvals** area, approve or reject an event by clicking the event name.

3 On the Summary of Changes page, enter comments if necessary.

Summary of Changes

The changes made by an employee are shown below. If any of the information is incorrect, reject the changes and the employee will be notified so that they can make corrections. You can also add comments, which will display in the approval history.

Comments:

Addresses

Enter your changes and click **Save**. **Note:** Changes will take effect immediately.

Home Address

Street:	aaa
Apt/Suite:	abcd
City/Town:	aaa
State/Prov:	Alberta
Postal/ZIP:	12345

4 At the bottom of the page, click **Approve** or **Reject**.

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 pending or completed approval history records, and you can export and purge records to keep your system running efficiently.

Viewing All Pending or Completed Events

Pending events include single events that have a step awaiting approval, and bundled events that have one or more steps awaiting approval.

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

To view all pending or completed events, do the following:

- 1 Point to **Home** and select **Manage Approval History**.
- 2 In the **Status** field, choose whether to view pending or completed events.

The default selection is **Pending**.

The screenshot shows the ADP Portal Administrator interface. At the top, there's a navigation bar with 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. Below this is the 'Manage Approval History' section. A message states: 'This page allows you to export approval history to a .csv file or purge approval history for completed events. Enter search criteria to filter the events. Click Advanced Search to enter additional criteria. To view status of submitted jobs, click Submitted Jobs Monitor.' The 'Status' dropdown is set to 'Pending'. There are input fields for 'Employee Name', 'Worksheet ID', and 'Event Name'. A 'Date Submitted' range is specified with 'From' and 'To' dates. There are 'Find' and 'Clear' buttons. Below the search area, there's a table with columns: Event Name, Employee Name/Worksheet ID, Originator Name, Date Submitted, Last Action Date, Effective Date, View History, and Status. At the bottom, there are buttons for 'Export', 'Export All', 'Purge', and 'Purge All'. The footer includes '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

- 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 the **Employee Name**, **Worksheet ID**, or **Event Name** fields, or click **Advanced Search** for more options. For more information, click **?** (**Help**) in the top-right corner of the page.

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

ADP
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Portal Administrator Home Workflow Setup Security Access Configuration Reports

Manage Approval History

This page allows you to export approval history to a .csv file or purge approval history for completed events. Enter search criteria to filter the events. Click Advanced Search to enter additional criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Status: Pending **Employee Name:** Enter/Select Name **Submitted Jobs Monitor** **Basic Search**
Worksheet ID: Enter/Select ID
Date Submitted: From: 06/15/2009 To: 08/01/2009 **Event Name:**
Last Action Date: From: To: **Originator Name:** Enter/Select Name
Effective Date: From: To: **Find** **Clear**

8 Found Rows per Page: 50

<input type="checkbox"/>	Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	View History	Status
<input type="checkbox"/>	Employee Event - Address	W Prashanth FMFX8	W Prashanth FMFX8	07/08/2009 11:32:49	07/08/2009 11:32:51		View	In Progress
<input type="checkbox"/>	Employee Event - Address	W Dattodil FMFX8	W Dattodil FMFX8	06/30/2009 14:36:06	07/01/2009 14:36:07		View	In Progress
<input type="checkbox"/>	Employee Event - Direct Deposit	W Rav FMFX8	W Rav FMFX8	07/08/2009 07:41:37	07/08/2009 07:41:38		View	In Progress
<input type="checkbox"/>	Employee Event - Emergency Contacts	W Dattodil FMFX8	W Dattodil FMFX8	07/22/2009 16:58:00	07/22/2009 16:58:04		View	In Progress
<input type="checkbox"/>	Employee Event - Emergency Contacts	W Seaholly FMFX8	W Seaholly FMFX8	07/22/2009 16:19:34	07/23/2009 01:01:03		View	In Progress
<input type="checkbox"/>	Employee Event - Skills	W Dattodil FMFX8	W Dattodil FMFX8	07/22/2009 17:13:29	07/22/2009 17:13:31		View	In Progress
<input type="checkbox"/>	WorkEvent-Job and Salary Change	Multiple	W Lotus FMFX8	07/20/2009 14:50:17	07/20/2009 14:59:14	Multiple		In Progress
<input type="checkbox"/>	WorkEvent-Job and Salary Change	W Sealsvender FMFX8	W Lotus FMFX8	07/06/2009 11:25:48	07/06/2009 11:34:36	09/20/2009	View	In Progress

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Note: If you search for pending events and one event in a bundle meets another search criterion, the entire bundle is displayed. If you search for completed events, an entire bundle must be completed before it is displayed. If an entire bundle is completed and one event in it meets another search criterion, all events in that bundle are displayed.

- 5 To see the progress that an event has made along its approval path, click **View** next to the event.

Note: For multiple (bundled) events, click the event name, then click **View** next to each individual event in the bundle.

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, choose whether to view pending or completed events.
- 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 the **Employee Name**, **Worksheet ID**, or **Event Name** fields, or click **Advanced Search** for more options. For more information, click **?** (**Help**) in the top-right corner of the page.

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

ADP
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Support | Company Directory | Log Off
Search Company Directory

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Manage Approval History

This page allows you to export approval history to a .csv file or purge approval history for completed events. Enter search criteria to filter the events. Click Advanced Search to enter additional criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Status: Pending
 Employee Name: Enter/Select Name
 Worksheet ID: Enter/Select ID
 Date Submitted: From: 06/15/2009 To: 08/01/2009
 Event Name: Enter/Select Name
 Last Action Date: From: To: Originator Name: Enter/Select Name
 Effective Date: From: To:

Find Clear

8 Found Rows per Page: 50

Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	View History	Status
<input type="checkbox"/> Employee Event - Address	vV PrashanthFMFX8	vV PrashanthFMFX8	07/08/2009 11:32:49	07/08/2009 11:32:51		View	In Progress
<input type="checkbox"/> Employee Event - Address	vV DattodifFMFX8	vV DattodifFMFX8	06/30/2009 14:36:06	07/01/2009 14:36:07		View	In Progress
<input type="checkbox"/> Employee Event - Direct Deposit	vV RavifFMFX8	vV RavifFMFX8	07/08/2009 07:41:37	07/08/2009 07:41:38		View	In Progress
<input type="checkbox"/> Employee Event - Emergency Contacts	vV DattodifFMFX8	vV DattodifFMFX8	07/22/2009 16:58:00	07/22/2009 16:58:04		View	In Progress
<input type="checkbox"/> Employee Event - Emergency Contacts	vV SeahollyFMFX8	vV SeahollyFMFX8	07/22/2009 16:19:34	07/23/2009 01:01:03		View	In Progress
<input type="checkbox"/> Employee Event - Skills	vV DattodifFMFX8	vV DattodifFMFX8	07/22/2009 17:13:29	07/22/2009 17:13:31		View	In Progress
<input type="checkbox"/> WorkEvent-Job and Salary Change	Multiple	vV LotusFMFX8	07/20/2009 14:50:17	07/20/2009 14:59:14	Multiple		In Progress
<input type="checkbox"/> WorkEvent-Job and Salary Change	vV SealavenderFMFX8	vV LotusFMFX8	07/06/2009 11:25:48	07/06/2009 11:34:36	09/20/2009	View	In Progress

Export Export All Purge Purge All

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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. (The **Export** button is enabled when you click to select a specific event name.)

Result: The Submitted Jobs Monitor page is displayed. 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.

Creation date	Job Process	Submitted By	Status	Records		
				Total	Completed	Failed
09/11/2009 11:44:43	Export All	vV BhanuFMFX8	Completed	8	8	0
09/08/2009 08:20:16	Purge Selected	vV RahimFMFX8	Completed	1	1	0
09/08/2009 08:01:01	Export Selected	vV RahimFMFX8	Completed	2	2	0
09/04/2009 13:50:13	Reroute Event	vV BhanuFMFX8	Completed	1	1	0
09/02/2009 06:11:32	Export All	vV RahimFMFX8	Completed	22	22	0

- Wait for the status of your export job to change from processing to completed, then click **Download** next to the job.
- Select a filename and destination, and click **Save**. A zipped .csv file is generated in the specified location. You are returned to the Submitted Jobs Monitor page.

Note: You can manually remove an event from your export file that is part of a bundle and does not meet your specific search criteria.

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.

- Point to **Home** and select **Manage Approval History**.
- In the **Status** field, select **Complete**.
- 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 the **Employee Name**, **Worksheet ID**, or **Event Name** fields, or click **Advanced Search** for more options. For more information, click **(Help)** in the top-right corner of the page.

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

Welcome, W Bhanu/FMX8 [Support](#) | [Company Directory](#) | [Log Off](#)
[Edit page content](#) [More Information...](#)
 Portal Administrator | Home | Workflow Setup | Security Access | Configuration | Reports

Manage Approval History

This page allows you to export approval history to a .csv file or purge approval history for completed events. Enter search criteria to filter the events. Click Advanced Search to enter additional criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Status: Employee Name: Submitted Jobs Monitor
 Worksheet ID:
 Date Submitted: From: To: Event Name:

30 Found Rows per Page:

Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	View History	Status
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	08/06/2009 02:12:42	08/06/2009 03:11:48		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	07/16/2009 05:47:59	07/21/2009 01:08:32		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	06/25/2009 09:04:05	07/08/2009 04:22:18		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	06/11/2009 05:44:03	06/25/2009 09:10:17		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Santhosh/FMX8	v/Santhosh/FMX8	07/16/2009 05:45:13	07/16/2009 05:45:15		<input type="button" value="View"/>	Complete
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	08/14/2009 04:33:20	08/14/2009 04:38:16		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Inthiyaz/FMX8	v/Inthiyaz/FMX8	08/06/2009 04:21:08	08/06/2009 04:22:58		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	07/08/2009 07:24:36	07/08/2009 07:36:56		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Sasikanth/FMX8	v/Sasikanth/FMX8	07/26/2009 23:01:00	08/06/2009 03:12:36		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Inthiyaz/FMX8	v/Inthiyaz/FMX8	08/06/2009 04:21:28	08/06/2009 04:22:44		<input type="button" value="View"/>	Complete
<input type="checkbox"/> Employee Event - Address	v/Sasikanth/FMX8	v/Sasikanth/FMX8	07/26/2009 23:01:25	07/26/2009 23:08:55		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	08/06/2009 01:59:50	08/06/2009 03:11:40		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	08/06/2009 03:11:16	08/06/2009 03:12:09		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Address	v/Usha/FMX8	v/Usha/FMX8	07/08/2009 07:36:11	07/08/2009 07:37:58		<input type="button" value="View"/>	Rejected
<input type="checkbox"/> Employee Event - Phone Numbers	v/Swordily/FMX8	v/Swordily/FMX8	06/30/2009 17:20:05	06/30/2009 17:20:08		<input type="button" value="View"/>	Complete
<input type="checkbox"/> Employee Event - Phone Numbers	v/Sealavender/FMX8	v/Sealavender/FMX8	07/01/2009 14:07:01	07/16/2009 13:39:15		<input type="button" value="View"/>	Cancelled
<input type="checkbox"/> Employee Event - Phone Numbers	v/Swordily/FMX8	v/Swordily/FMX8	06/30/2009 17:24:31	07/20/2009 15:55:45		<input type="button" value="View"/>	Cancelled
<input type="checkbox"/> WorkEvent-Employment Status Change	v/DIB/FMX8	v/Lotus/FMX8	07/21/2009 14:32:58	07/21/2009 16:50:47	08/15/2009	<input type="button" value="View"/>	Cancelled
<input type="checkbox"/> WorkEvent-Employment Status Change	v/Jerseyilly/FMX8	v/Lotus/FMX8	07/22/2009 11:46:20	08/06/2009 03:12:31	09/12/2009	<input type="button" value="View"/>	Recalled
<input type="checkbox"/> WorkEvent-Employment Status Change	v/Gloryilly/FMX8	v/Lotus/FMX8	07/21/2009 14:32:56	07/21/2009 16:50:49	08/16/2009	<input type="button" value="View"/>	Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Peony/FMX8	v/Lotus/FMX8	07/07/2009 16:11:36	07/07/2009 16:18:50	06/07/2009	<input type="button" value="View"/>	Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Gloryilly/FMX8	v/Lotus/FMX8	06/30/2009 17:25:20	06/30/2009 17:25:25	09/15/2009	<input type="button" value="View"/>	Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Peony/FMX8	v/Lotus/FMX8	06/30/2009 17:26:45	06/30/2009 17:26:51	08/15/2009	<input type="button" value="View"/>	Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	Multiple	v/Lotus/FMX8	06/30/2009 17:24:15	06/30/2009 17:24:25	09/15/2009		Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	Multiple	v/Ashish/FMX8	07/26/2009 23:05:41	07/26/2009 23:08:31	Multiple		Complete
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Seasholly/FMX8	v/Lotus/FMX8	07/06/2009 11:25:52	07/06/2009 11:34:36	09/15/2009	<input type="button" value="View"/>	Recalled
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Inthiyaz/FMX8	v/Ashish/FMX8	08/06/2009 04:25:18	08/06/2009 04:26:45	07/06/2009	<input type="button" value="View"/>	Rejected
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Lilac/FMX8	v/Lotus/FMX8	07/07/2009 16:11:39	07/07/2009 16:17:20	06/07/2009	<input type="button" value="View"/>	Recalled
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Jyothi/FMX8	v/Ashish/FMX8	08/06/2009 04:25:23	08/06/2009 04:26:47	07/06/2009	<input type="button" value="View"/>	Rejected
<input type="checkbox"/> WorkEvent-Job and Salary Change	v/Jerseyilly/FMX8	v/Lotus/FMX8	07/22/2009 11:46:16	07/22/2009 13:52:32	09/11/2009	<input type="button" value="View"/>	Recalled

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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. (The **Purge** button is enabled when you click to select a specific event name.)

Result: A confirmation message is displayed.

6 Click **OK** to confirm your action. 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 more than 30 days old are automatically deleted.

- 1 Point to **Home** and select **Manage Approval History**.
- 2 Click **Submitted Jobs Monitor**.

The **Submitted Jobs Monitor** link

ADP Welcome, W BhanuFMFX8 Support | Company Directory | Log Off

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Manage Approval History

This page allows you to export approval history to a .csv file or purge approval history for completed events. Enter search criteria to filter the events. Click Advanced Search to enter additional criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Status: Pending Employee Name: Enter/Select Name Submitted Jobs Monitor Advanced Search

Worksheet ID: Enter/Select ID

Date Submitted: From: To: Event Name: Find Clear

Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	View History	Status
Export Export All Purge Purge All							

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

View status of submitted jobs. Position your cursor on Creation Date to view search criteria for the job. Click Download to copy the exported records to your local system. If a 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
<input type="checkbox"/> 09/02/2009 06:11:32	Export All	W BhanuFMFX8	Completed	<input type="button" value="Download"/>	22	22	0
<input type="checkbox"/> 08/06/2009 15:10:45	Export Selected	W OrchidFMFX8	Completed	<input type="button" value="Download"/>	4	4	0
<input type="checkbox"/> 08/06/2009 15:09:57	Export All	W OrchidFMFX8	Completed	<input type="button" value="Download"/>	9	9	0

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

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.

Note: All approval steps in a bundle must be completed before an update is made to the Payroll module.

- 1 Point to **Home** and select **Manage Active Workflow**.
- 2 Find the individual or work group to where the step was originally assigned.

Individual is selected by default.

ADP Welcome, W BhanuFMFX8 [Support](#) | [Company Directory](#) | [Log Off](#)
☐ Edit page content [More Information...](#) Search Company Directory

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Manage Active Workflow

This page enables you to reroute the current step within a workflow path that is pending approval, or to cancel an event, without updating the system of record. Enter search criteria to filter the events. Click Advanced Search to enter additional search criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Assigned To: Individual: ☐ Enter/Select Name Employee Name: Enter/Select Name Submitted Jobs Monitor Advanced Search
 Work Group: ☐ Worksheet ID: Enter/Select ID
 Date Submitted: From: To: Event Name: Find Clear

Assigned To	Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	Action
<input type="button" value="Reroute"/> <input type="button" value="Cancel Event"/>							

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To Find

An individual approver

Then Select

Individual in the **Assigned To** field. In the **Individual** field, enter at least 3 characters of the approver's name, and then click the down arrow to find the individual in the list. 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, enter the name of the work group, or 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 the **Employee Name**, **Worksheet ID**, or **Event Name** fields, or click **Advanced Search** for more options. For more information, click **?** **(Help)** in the top-right corner of the page.

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

ADP Welcome, W BhanuFMFX8 [Support](#) | [Company Directory](#) | [Log Off](#)
☐ Edit page content [More Information...](#) [?](#)

Portal Administrator | [Home](#) | [Workflow Setup](#) | [Security Access](#) | [Configuration](#) | [Reports](#)

Manage Active Workflow [?](#)

This page enables you to reroute the current step within a workflow path that is pending approval, or to cancel an event, without updating the system of record. Enter search criteria to filter the events. Click Advanced Search to enter additional search criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Assigned To: **Individual:** **Employee Name:** [Submitted Jobs Monitor](#) [Advanced Search](#)

Work Group: **Worksheet ID:**

Date Submitted: From: To: **Event Name:**

8 Found Rows per Page: 50

Assigned To	Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	Action
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Address	W PrashanthFMFX8	W PrashanthFMFX8	07/08/2009 11:32:49	07/08/2009 11:32:51		In Progress
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Address	W DaffodilFMFX8	W DaffodilFMFX8	06/30/2009 14:36:06	07/01/2009 14:36:07		In Progress
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Direct Deposit	W RaviFMFX8	W RaviFMFX8	07/08/2009 07:41:37	07/08/2009 07:41:38		In Progress
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Emergency Contacts	W SeahollyFMFX8	W SeahollyFMFX8	07/22/2009 16:19:34	07/23/2009 01:01:03		In Progress
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Emergency Contacts	W DaffodilFMFX8	W DaffodilFMFX8	07/22/2009 16:58:00	07/22/2009 16:58:04		In Progress
<input type="checkbox"/> sd wfg one for wvf	Employee Event - Skills	W DaffodilFMFX8	W DaffodilFMFX8	07/22/2009 17:13:29	07/22/2009 17:13:31		In Progress
<input type="checkbox"/> sd wfg one for wvf	WorkEvent-Job and Salary Change	W SwordillyFMFX8	W LotusFMFX8	07/20/2009 14:50:24	07/20/2009 14:50:26	08/16/2009	In Progress
<input type="checkbox"/> sd wfg one for wvf	WorkEvent-Job and Salary Change	W SealavenderFMFX8	W LotusFMFX8	07/06/2009 11:26:09	07/21/2009 09:56:57	09/20/2009	In Progress

The **Reroute** button is enabled when you click to select the step(s).

- 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**. The Submitted Jobs Monitor page is displayed with your update.

Note: If you set up a global Reroute Notification e-mail and you reroute a step to an individual or a work group, this notification is now sent to the new assignee.


Cancelling an Event

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

Note: If an event in a bundle is cancelled, the other events in the bundle continue down the approval path and remain in the bundle.

- 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	Then Select
An individual approver	Individual in the Assigned To field. In the Individual field, enter at least 3 characters of the approver's name, and then click the down arrow to find the individual in the list. 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, enter the name of the work group, or 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 the **Employee Name**, **Worksheet ID**, or **Event Name** fields, or click **Advanced Search** for more options. For more information, click  **(Help)** in the top-right corner of the page.

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

The **Cancel Event** button is enabled when you click to select the event(s).

Welcome, W BhanuFMFX8
[Edit page content](#) [More Information...](#) [Support](#) | [Company Directory](#) | [Log Off](#)
 Search Company Directory

Portal Administrator | Home | Workflow Setup | Security Access | Configuration | Reports

Manage Active Workflow

This page enables you to reroute the current step within a workflow path that is pending approval, or to cancel an event, without updating the system of record. Enter search criteria to filter the events. Click Advanced Search to enter additional search criteria. To view status of submitted jobs, click Submitted Jobs Monitor.

Assigned To: Individual: Enter/Select Name Employee Name: Enter/Select Name Submitted Jobs Monitor Advanced Search
 Work Group: Worksheet ID: Enter/Select ID
 Date Submitted: From: 06/01/2009 To: 08/15/2009 Event Name: Find Clear

8 Found Rows per Page: 50

Assigned To	Event Name	Employee Name/Worksheet ID	Originator Name	Date Submitted	Last Action Date	Effective Date	Action
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Address	vV PrashanthFMFX8	vV PrashanthFMFX8	07/08/2009 11:32:49	07/08/2009 11:32:51		In Progress
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Address	vV DaffodiFMFX8	vV DaffodiFMFX8	06/30/2009 14:36:06	07/01/2009 14:36:07		In Progress
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Direct Deposit	vV RaviFMFX8	vV RaviFMFX8	07/08/2009 07:41:37	07/08/2009 07:41:38		In Progress
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Emergency Contacts	vV SeahollyFMFX8	vV SeahollyFMFX8	07/22/2009 16:19:34	07/23/2009 01:01:03		In Progress
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Emergency Contacts	vV DaffodiFMFX8	vV DaffodiFMFX8	07/22/2009 16:58:00	07/22/2009 16:58:04		In Progress
<input type="checkbox"/> sd wsg one for wrl	Employee Event - Skills	vV DaffodiFMFX8	vV DaffodiFMFX8	07/22/2009 17:13:29	07/22/2009 17:13:31		In Progress
<input type="checkbox"/> sd wsg one for wrl	WorkEvent-Job and Salary Change	vV SwordillyFMFX8	vV LotusFMFX8	07/20/2009 14:50:24	07/20/2009 14:50:26	08/16/2009	In Progress
<input type="checkbox"/> sd wsg one for wrl	WorkEvent-Job and Salary Change	vV SealavenderFMFX8	vV LotusFMFX8	07/06/2009 11:26:09	07/21/2009 09:56:57	09/20/2009	In Progress

Reroute Cancel Event

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.

Result: A confirmation message is displayed.

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

Note: If you set up a Cancel Notification e-mail, this notification is now sent to the originator of the event.

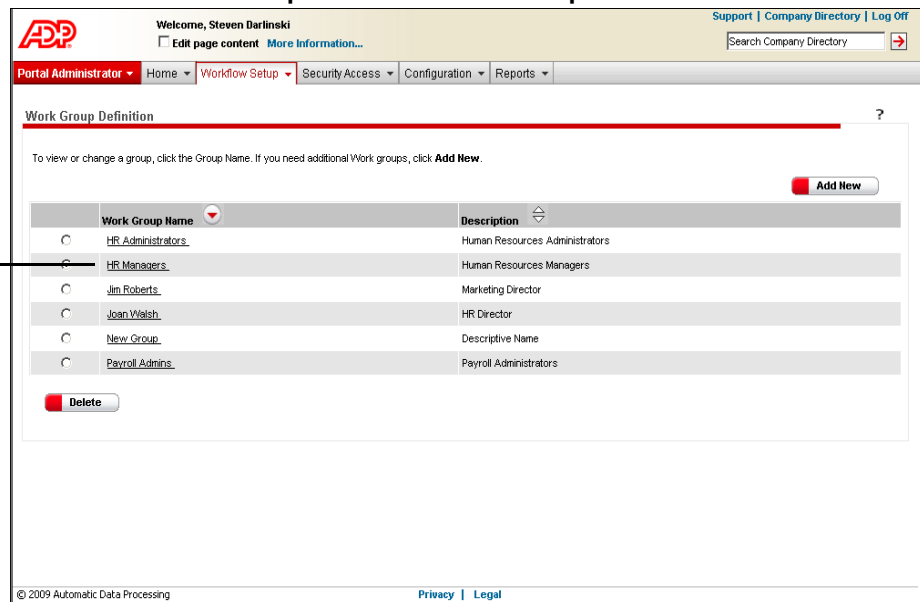
Changing or Deleting a Work Group

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**.

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



ADP Welcome, Steven Darlinski [Support](#) | [Company Directory](#) | [Log Off](#)
☐ Edit page content [More Information...](#) Search Company Directory

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Work Group Definition

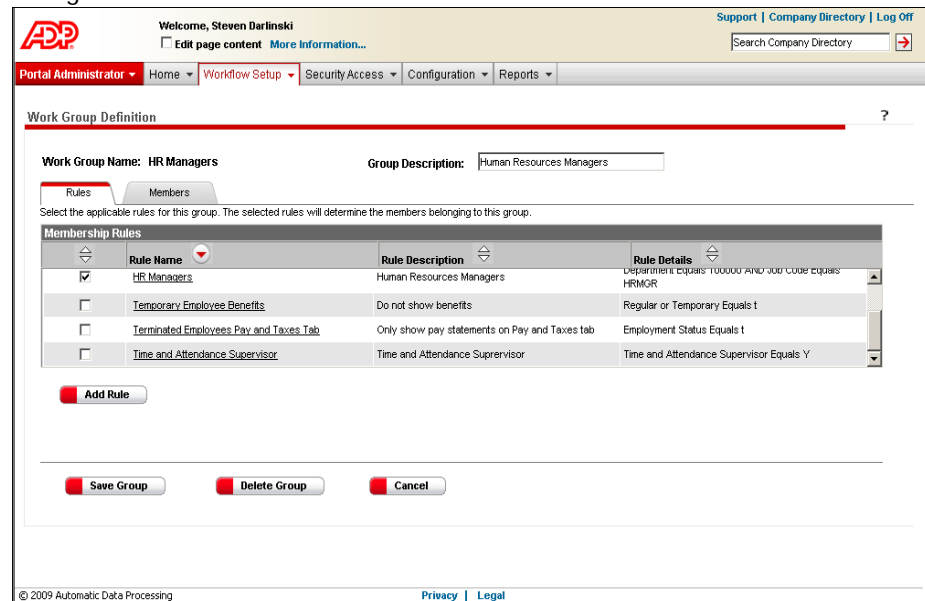
To view or change a group, click the Group Name. If you need additional Work groups, click **Add New**.

Work Group Name	Description
HR Administrators	Human Resources Administrators
HR Managers	Human Resources Managers
Jim Roberts	Marketing Director
Joan Welsh	HR Director
New Group	Descriptive Name
Payroll Admins	Payroll Administrators

Delete

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- 2 Change information as needed.



ADP Welcome, Steven Darlinski [Support](#) | [Company Directory](#) | [Log Off](#)
☐ Edit page content [More Information...](#) Search Company Directory

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Work Group Definition

Work Group Name: HR Managers **Group Description:** Human Resources Managers

Rules **Members**

Select the applicable rules for this group. The selected rules will determine the members belonging to this group.

Rule Name	Rule Description	Rule Details
<input checked="" type="checkbox"/> HR Managers	Human Resources Managers	Department Equals 100000 AND Job Code Equals HRMSR
<input type="checkbox"/> Temporary Employee Benefits	Do not show benefits	Regular or Temporary Equals t
<input type="checkbox"/> Terminated Employees Pay and Taxes Tab	Only show pay statements on Pay and Taxes tab	Employment Status Equals t
<input type="checkbox"/> Time and Attendance Supervisor	Time and Attendance Supervisor	Time and Attendance Supervisor Equals Y

Add Rule

Save Group **Delete Group** **Cancel**

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- 3 Click a check box to select or clear an existing rule, or click **Add Rule** to create a new rule.

4 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**.

ADP

Welcome, Steven Darlinski

[Edit page content](#) [More Information...](#)

[Support](#) | [Company Directory](#) | [Log Off](#)

[→](#)

Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾

Work Group Definition

Work Group Name: **HR Managers** Group Description:

Rules Members

This list contains members that have been derived from the rules or added manually. The members that are currently active members are shown as checked. Members that have been removed manually are shown as greyed out and unchecked. To add additional members manually, click the "Add Members" button.

First Name: Job:

Last Name: Location:

Department:

1 Found Rows per Page:

<input type="checkbox"/>	Name	Department	Job	Location	Rule Name
<input checked="" type="checkbox"/>	Franklin, David	000010	MANAGER	1000	N/A

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Note: If you see a name that appears disabled (grayed out) and unchecked, this user meets the criteria for a membership rule assigned to the work group; however, the user was previously removed from membership. To add this user to the group, click to select the corresponding check box.

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

Deleting a Work Group

You cannot delete a work group that is being used in an approval path or a proxy assignment; you must first remove the work group from the approval path or proxy assignment.

- 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.

ADP

Welcome, Steven Darlinski

[Edit page content](#) [More Information...](#)

[Support](#) | [Company Directory](#) | [Log Off](#)

[➔](#)

Portal Administrator ▾ Home ▾ Workflow Setup ▾ Security Access ▾ Configuration ▾ Reports ▾

Work Group Definition ?

To view or change a group, click the Group Name. If you need additional Work groups, click **Add New**.

Add New

Work Group Name	Description
<input type="radio"/> HR Administrators	Human Resources Administrators
<input checked="" type="radio"/> HR Managers	Human Resources Managers
<input type="radio"/> Jim Roberts	Marketing Director
<input type="radio"/> Joan Walsh	HR Director
<input type="radio"/> New Group	Descriptive Name
<input type="radio"/> Payroll Admins	Payroll Administrators

Delete

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

Changing or Deleting an Approval Path

You can change an approval path at any time, but you cannot delete an approval path that is associated with an event; you must first remove the approval path from the event.

- 1 Point to **Workflow Setup** and select **Approval Path Definition**.
- 2 Click the approval path you want to change or delete.
- 3 Verify this is the correct path.

ADP

Welcome, Steven Darlinski

[Edit page content](#) [More information...](#)

[Support](#) | [Company Directory](#) | [Log Off](#)

[➔](#)

Portal Administrator | Home | Workflow Setup | Security Access | Configuration | Reports

Approval Path Definition

This page defines an approval workflow path. Click Save to save your changes. Click Delete to delete approval path.

Approval Process Definition

Name: Payroll Admins

Description: Payroll Administrator Approval Path

There are unlimited steps that can be associated with any given workflow path. To add an additional step, click Add Step. To delete a step from this path, click Delete.

Direction	Step	Action	Delete Step
Workgroup	Payroll Admins	Approval	<input type="button" value="Delete"/>

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- 4 Do either of the following:
 - Make your changes and click **Save**.
 - Click **Delete** to delete the path, and then click **OK** to confirm your action.

Changing or Deleting a Business Rule

Changing a Business Rule

- 1 Point to **Workflow Setup** and select **Business Rules**.
- 2 Click the rule you want to change.
- 3 On the **Business Rules** detail page, make necessary changes. As you make selections, corresponding fields and buttons become enabled.

- 4 When you are done, click **Save**.
- 5 Test the business rule by adding it to an approval path 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 the rule you want to delete.

3 Verify that this is the correct rule.

Welcome, Steven Darlinski

[Edit page content](#) [More Information...](#)

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Business Rules

This page defines a business rule for workflow. Attributes available for rule logic vary based on event. Click Save to save your changes. Click Delete to delete the business rule.

Event Type Employee Event - Tax Withholding

Business Name Federal Exemptions > 10

Business Description Federal Exemptions > 10 require HR Manager Approval

Business Rule Definition

Action: Select action

Comparison Variable: Select variable

Calculation Variable: Select variable

AND OR

~ (New Federal Additional Withholding > 10)

Business Rule

Undo Clear

Save Cancel Reset Delete

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

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.

Note: 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

The screenshot shows the ADP Portal Administrator interface. At the top right, there is a search bar labeled 'Search Company Directory' with a magnifying glass icon. Below the search bar, the interface is divided into several sections: 'Welcome', 'News and Announcements', 'Message Center at a Glance', 'Events', 'Spotlight', and 'Features'. The 'Welcome' section includes a 'Who We Are' subsection. The 'News and Announcements' section includes 'Company Named Best Employer' and 'Blood Drive'. The 'Message Center at a Glance' section includes a link to 'Activities to complete(?)' and 'Approvals and Notifications'. The 'Spotlight' section features a photo of Roberta Carney and a description of her achievements. The 'Features' section includes links to 'Public Relations News Release', 'Corporate Directory', and 'Associate Handbook'. A sidebar on the right contains links to 'Health', 'Weather', 'Yellow Pages', 'Maps', 'Trends', 'Money', 'News', and 'Search'.

- 2 If more than one contact meets your search criteria, a list will display.

Click the contact name you want.

The screenshot shows the ADP Portal Administrator interface with the 'Company Directory' section active. Below the search bar, there is a table of search results. The table has columns for 'Name', 'Department', 'Location', 'Phone', and 'E-mail Address'. The results show two entries: 'Practitioner, Jane' and 'Practitioner, John'. Below the table, there are buttons for 'Find Again', 'Previous', '1', and 'Next'. The 'Find Again' button is highlighted in red.

Name	Department	Location	Phone	E-mail Address
Practitioner, Jane			00000000	-
Practitioner, John			00000000	-

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**.

The screenshot displays the ADP Company Directory search interface. At the top, there's a header with the ADP logo, a welcome message for 'Steven Darlinski', and links for 'Support', 'Company Directory', and 'Log Off'. Below this is a navigation bar with 'Portal Administrator' and a dropdown menu showing 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The main content area is titled 'Company Directory' and contains a search form. The form has a prompt: 'Enter information in at least one field. Entering part of name is allowed'. It includes input fields for 'First Name', 'Last Name', 'Preferred Name', 'Department', and 'Location'. A 'Results per Page' dropdown is set to '20'. A red 'Submit' button is at the bottom of the form. The footer contains the copyright notice '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

- 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**.

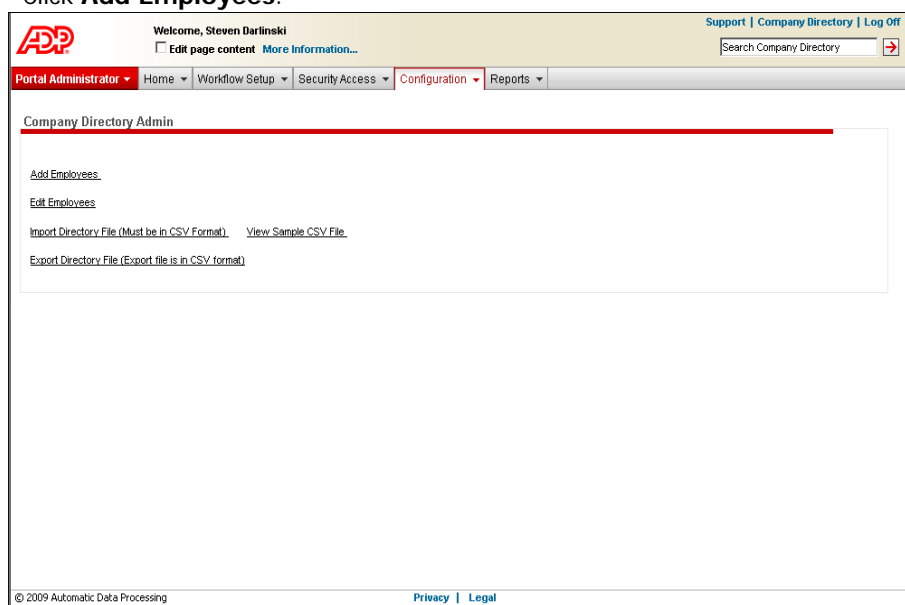
Working with Individual Contacts

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 70.](#))

Adding a Contact to Your Directory

- 1 Point to **Configuration** and select **Company Directory**.
- 2 Click **Add Employees**.



3 Enter the appropriate information.

The screenshot shows the ADP Company Directory Admin interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Steven Darlinski, and links for Support, Company Directory, and Log Off. Below this is a search bar for the Company Directory. A secondary navigation bar includes links for Portal Administrator, Home, Workflow Setup, Security Access, Configuration, and Reports. The main content area is titled 'Company Directory Admin' and contains the 'Add Employee' form. The form includes sections for Personal Information (Show in Directory, First Name, Last Name, Preferred First Name, Job Title, Department, Reports To), Contact Information (Phone, E-mail address, Cell Phone, Pager, FAX, Main Phone, Admin Name, Admin Phone), and Location Information (Street, Street 2, City, State / Province, Postal / ZIP, Country, Office Cube #, Location). At the bottom of the form are buttons for Save, Reset, and Back. The footer contains copyright information for 2009 Automatic Data Processing and links for Privacy and Legal.

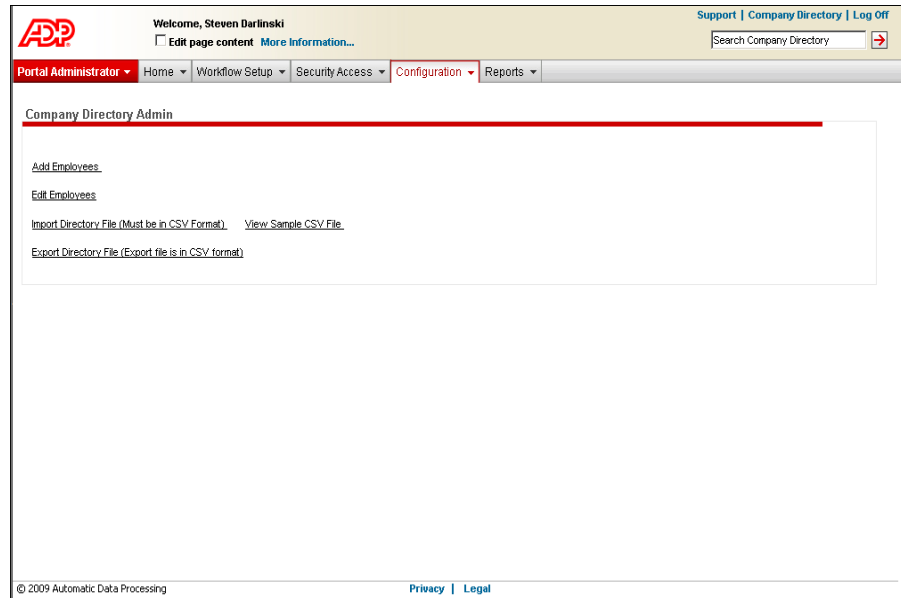
4 Click **Save**, and then click **OK** to confirm your action.

Editing a Contact in Your Directory

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

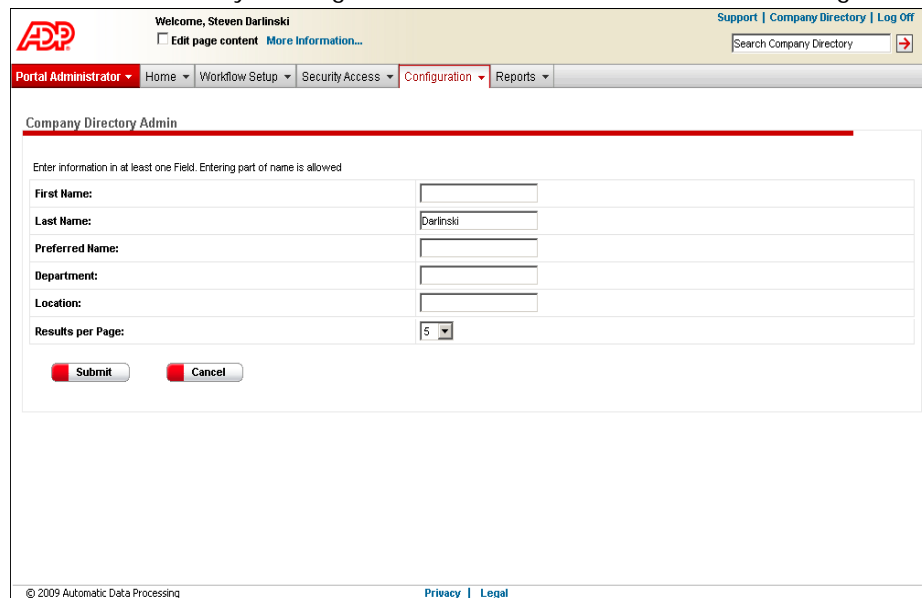
Important: If an employee's data is in either the HR & Benefits module or the Payroll module, you or your payroll practitioner needs to update the data in either the HR & Benefits module or the Payroll module so that changes are applied appropriately.

- 1 Point to **Configuration** and select **Company Directory**.
- 2 Click **Edit Employees**.



The screenshot shows the ADP Portal Administrator interface. At the top, there is a welcome message for Steven Darlinski and a search bar for the Company Directory. The main navigation bar includes links for Home, Workflow Setup, Security Access, Configuration (highlighted), and Reports. Below this, the 'Company Directory Admin' section is visible, containing links for 'Add Employees', 'Edit Employees', 'Import Directory File (Must be in CSV Format)', and 'Export Directory File (Export file is in CSV format)'. The footer includes copyright information for 2009 Automatic Data Processing and links for Privacy and Legal.

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



The screenshot shows the ADP Portal Administrator interface with the search form for the Company Directory Admin page. The form includes fields for 'First Name', 'Last Name' (pre-filled with 'Darlinski'), 'Preferred Name', 'Department', and 'Location'. There is also a 'Results per Page' dropdown menu set to 5. At the bottom of the form, there are 'Submit' and 'Cancel' buttons. The footer includes copyright information for 2009 Automatic Data Processing and links for Privacy and Legal.

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

The screenshot shows the ADP Company Directory Admin interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Steven Darlinski, and links for Support, Company Directory, and Log Off. Below this is a menu bar with options like Portal Administrator, Home, Workflow Setup, Security Access, Configuration, and Reports. The main content area is titled 'Company Directory Admin' and contains a table with columns: Name, Department, Location, Phone, E-mail Address, and Show in Directory. The table lists Steven Darlinski with a link to edit his information in the 'Show in Directory' column. Below the table are buttons for Delete, Search, Add Employee, and pagination controls.

5 Make your changes.

The screenshot shows the ADP Company Directory Admin interface with the 'Edit' form for Steven Darlinski. The form is titled 'Company Directory Admin' and contains sections for Personal Information, Contact Information, and Location Information. The 'Personal Information' section includes fields for First Name, Last Name, Preferred First Name, Job Title, Department, and Reports To. The 'Contact Information' section includes fields for Phone, E-mail address, Cell Phone, Pager, FAX, Main Phone, Admin Name, and Admin Phone. The 'Location Information' section includes fields for Street, Street 2, City, State / Province, Postal / ZIP, Country, Office Cube #, and Location. The form also has a 'Show in Directory' checkbox and buttons for Save, Reset, and Back.

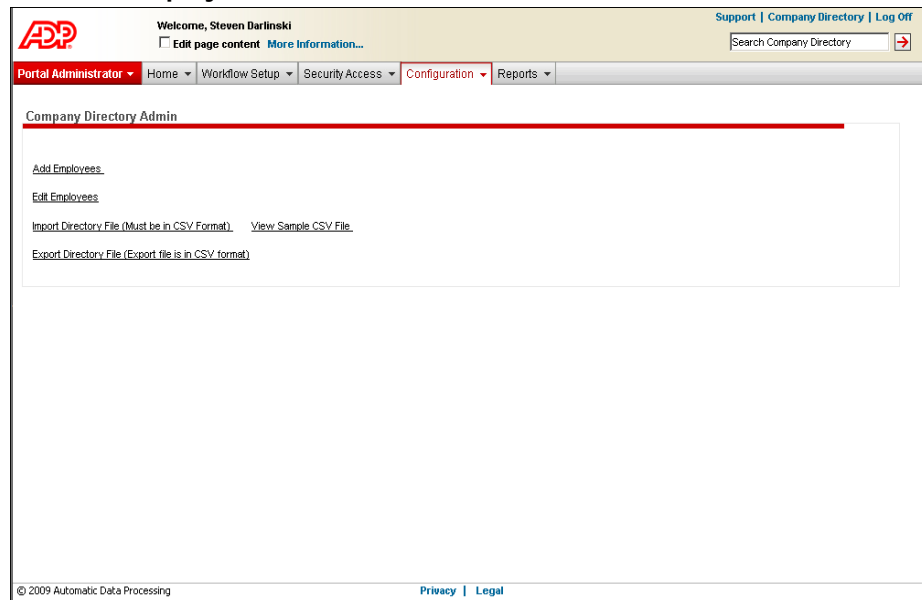
6 When you are done, click **Save**, and then click **OK**.

Note: Changes that you make in your company directory will not display in either your HR & Benefits module or your Payroll module.

Deleting a Contact from Your Directory

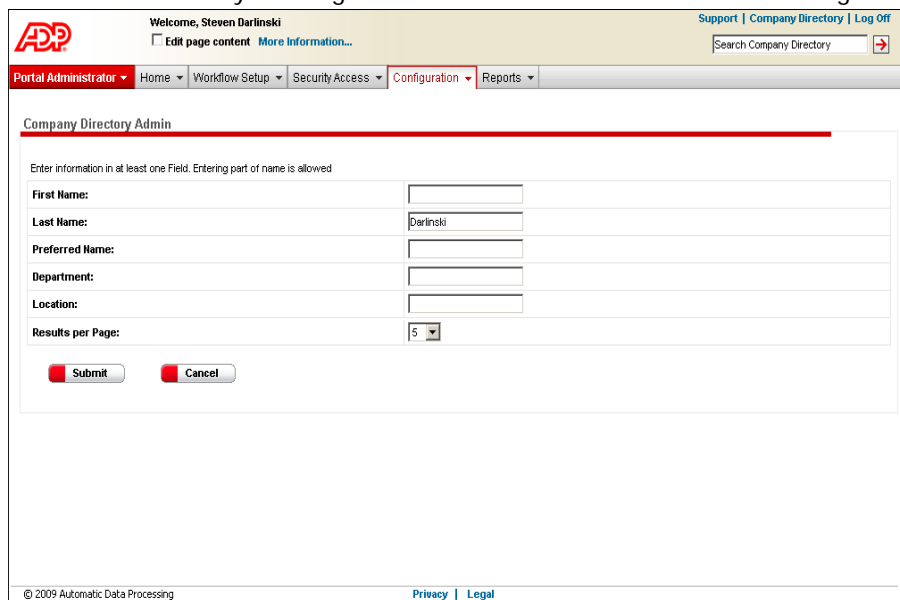
You can delete contacts who were added individually or in a .csv file. For example, you can delete a contract employee who no longer works for the company. When you delete a contact, you are only deleting it from the company directory and not your module.

- 1 Point to **Configuration** and select **Company Directory**.
- 2 Click **Edit Employees**.



The screenshot shows the ADP portal interface. At the top, there's a welcome message for Steven Darlinski and a search bar. The navigation menu includes 'Portal Administrator', 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The 'Configuration' menu is expanded, showing 'Company Directory Admin'. Under this section, there are links for 'Add Employees', 'Edit Employees', 'Import Directory File (Must be in CSV Format)', 'View Sample CSV File', and 'Export Directory File (Export file is in CSV format)'. The 'Edit Employees' link is highlighted.

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



The screenshot shows the ADP portal interface with the search form. The 'Configuration' menu is expanded, showing 'Company Directory Admin'. The search form is displayed with the following fields: 'First Name', 'Last Name' (containing 'Darlinski'), 'Preferred Name', 'Department', 'Location', and 'Results per Page' (set to 5). The 'Submit' button is highlighted.

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

The screenshot shows the ADP Company Directory Admin interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Steven Darlinski, and links for Support, Company Directory, and Log Off. Below this is a search bar and a navigation menu with options like Portal Administrator, Home, Workflow Setup, Security Access, Configuration, and Reports. The main content area is titled 'Company Directory Admin' and contains a table of employees. The table has columns for Name, Department, Location, Phone, E-mail Address, and Show in Directory. One employee, Steven Darlinski, is listed with a checked checkbox in the first column. Below the table are buttons for Delete, Search, and Add Employee, and a pagination bar showing 'Previous', '1', and 'Next'.

<input type="checkbox"/>	Name	Department	Location	Phone	E-mail Address	Show in Directory
<input checked="" type="checkbox"/>	Darlinski, Steven			9739524171	sdarlinski@geneva.com	S Edit

1

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

Working with .CSV Files

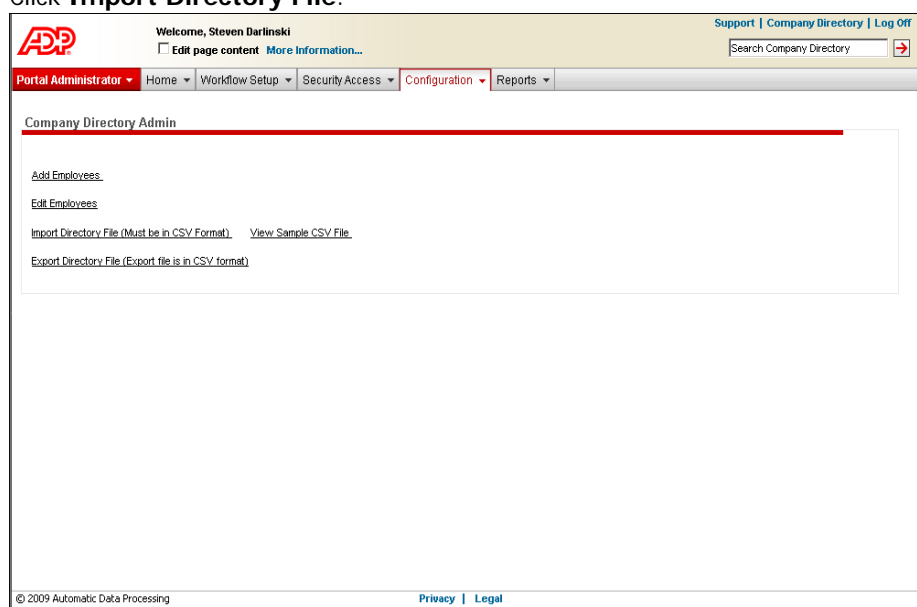
Importing a Directory File

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 in your directory or replace them.

Before you begin, you will need to create the .csv file that contains your contact information and save it 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**. Then click **View Sample CSV 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**.

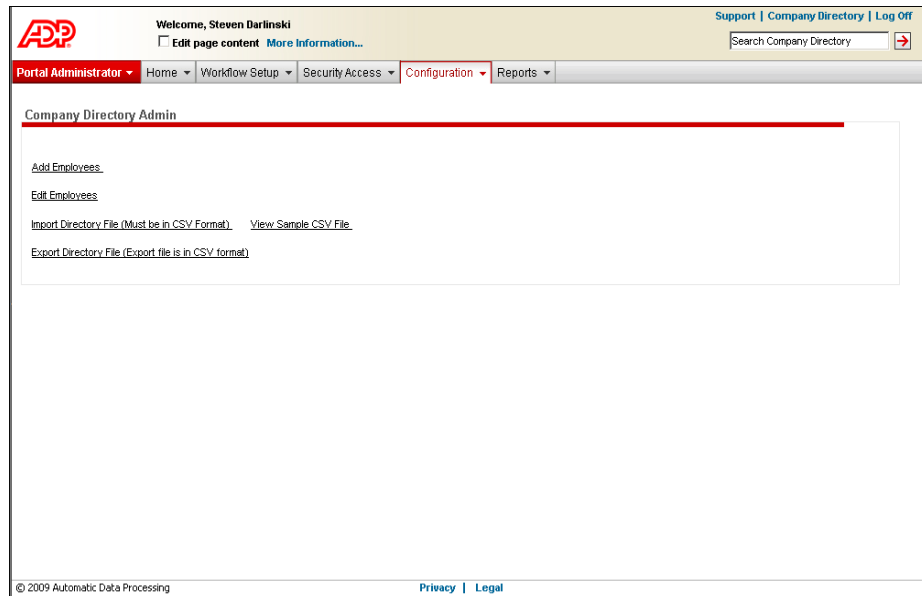
The screenshot shows the ADP Company Directory Admin interface. At the top, there is a header with the ADP logo, a welcome message for Steven Darlinski, and links for Support, Company Directory, and Log Off. Below the header is a navigation bar with tabs for Portal Administrator, Home, Workflow Setup, Security Access, Configuration, and Reports. The main content area is titled 'Company Directory Admin' and contains the 'Import Directory File' section. This section includes a note that the file must be in CSV Format and two radio button options: 'Add to existing file' (selected) and 'Replace existing file'. Below these options is a text input field for the 'Directory File' and a 'Browse...' button. At the bottom of the section are 'save' and 'cancel' buttons. The footer of the page includes the copyright notice '© 2009 Automatic Data Processing' and links for Privacy and Legal.

- 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**.

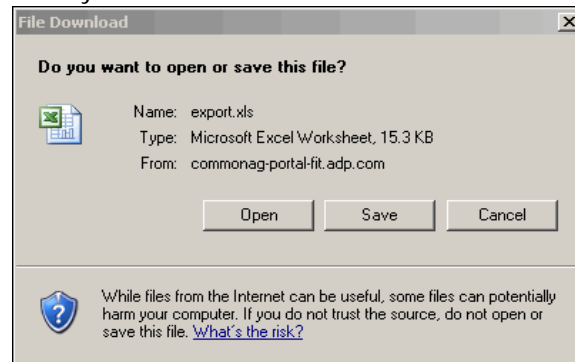
Exporting Your Directory File

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.

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:

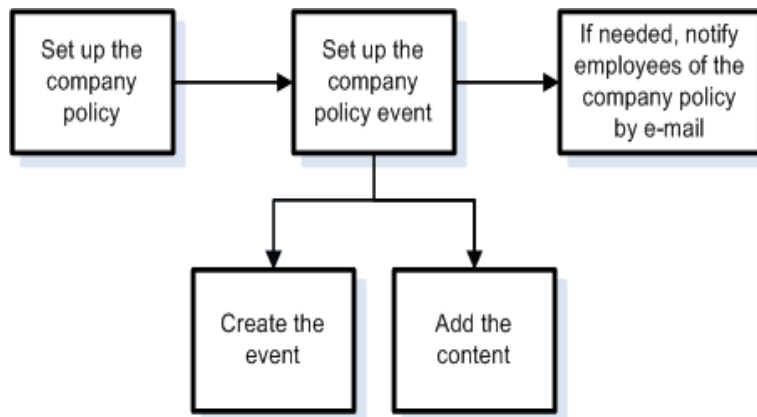
- Having a message pop up when they log on to ADP Workforce Now. This message directs them to where they need to go to read or acknowledge the new policy.
- Sending them an e-mail to let them know about the new policy.

This chapter covers the tasks involved in setting up a company policy and rolling it out to employees.

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.

The Process



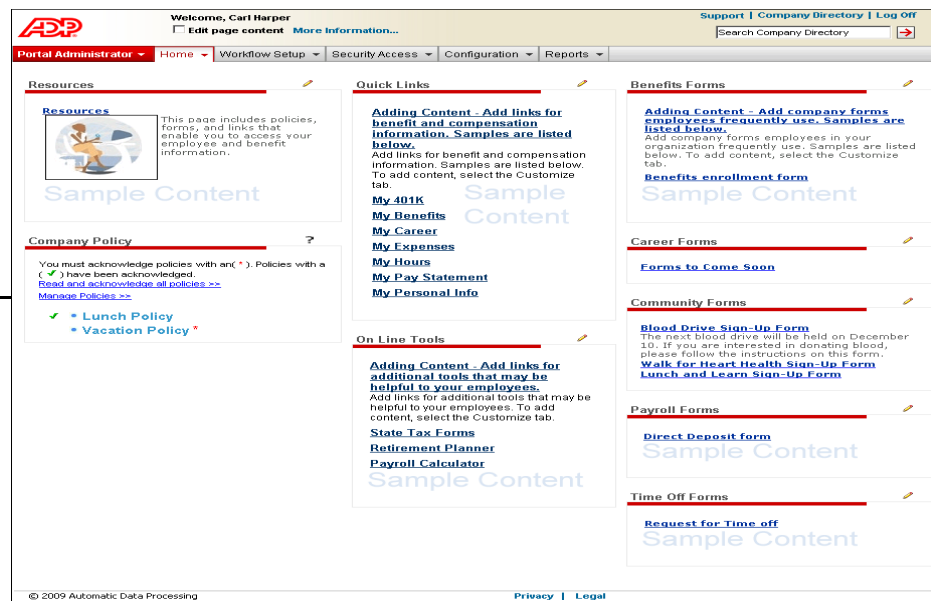
Setting Up a Company Policy

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 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.

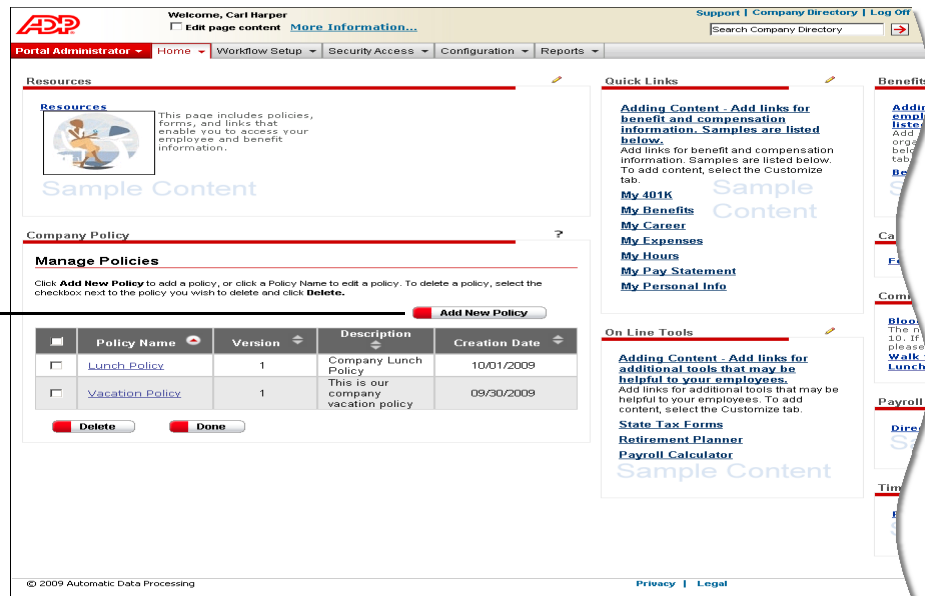
- 1 Point to **Home** and select **Resources**.
- 2 In the **Company Policy** area, click **Manage Policies**.

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.

In this example, a cell phone policy is added.

The screenshot shows the 'Add Policy' form in the ADP Portal Administrator interface. The form includes the following fields and options:

- Policy Name:** Cell Phone Use Policy
- Version:** V1.0
- Description:** (Empty text area)
- Policy Content:**
 - ☐ Hyperlink
 - ☒ Document: cell_phone_use_policy.doc
 - [Select File](#)
- ☒ **Acknowledgement Required**
- ☒ I agree that my company (not ADP) is responsible for any policies that are uploaded to this ADP application and that ADP does not review, approve or have any liability whatsoever to my company or any third party with respect to such policies.
- [Save](#) [Cancel](#)

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.
Document	Click Select File , then click Browse to find the file. Click Upload . Acceptable file formats are .doc, .docx, .pdf, .htm, and .html.

- 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**. You are returned to the updated Manage Policies page, where you can sort and view all company policies that have been set up for your company.

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 77.](#))

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 **Event Configuration**.
- 2 Click **Add New Event**.

ADP Welcome, Carl Harper [Support](#) | [Company Directory](#) | [Log Off](#)
☐ Edit page content [More Information...](#)
 Search Company Directory

Portal Administrator Home Workflow Setup Security Access **Configuration** Reports

Configurable Events ?

Event List

This page displays details for defined configurable events. Select Current to view new, pending, or active events. Select History to view expired events.

To add new events, click Add new event. To update or view details for an existing event, click the underlined event Name. To send email notification for a pending or active event, click Send Notification. To view employee completion details for active and expired events, click View Reports. To delete a new or pending event, click Delete.

View:

Name	Type	Status	Prompt at Login?	Start Date	End Date	
Lunch Policy	Company Policy	Active	No	10/01/2009		Send Notification View Report
General Company Policies	Company Policy	Active	Yes	10/05/2009	10/31/2009	Send Notification View Report
Year end policies	Company Policy	New	Yes	10/06/2009	10/09/2009	Delete
Year end policies	Company Policy	New	No	10/06/2009		Delete

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

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

The screenshot shows the ADP Portal Administrator interface. At the top, there's a navigation bar with 'Portal Administrator' selected. Below it, the 'Event Configuration' page is displayed. The 'Type' field is set to 'Company Policy'. The 'Name' field contains 'Cell Phone Policy Event'. The 'Description' field is empty. The 'Start Date' is 10/15/2009 and the 'End Date' is 11/01/2009. The 'Prompt at Login' checkbox is checked. The 'Security Groups' section shows 'admin' and 'practitioner' in the 'Available Groups' list and 'employee' and 'manager' in the 'Selected Groups' list. The 'Create Event' button is highlighted.

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. For example, if you select "Prompt at Login," then this is the date employees will begin seeing the prompt.


Important: If you enter the current date and finish the steps to complete the event, employees will receive the event immediately. After this happens, you cannot make any changes to the event except for the end date and the decision to show a prompt when employees log on to ADP Workforce Now. 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: Once an end date is reached, employees can no longer complete the event. They can still read or acknowledge the policy that was included in the event in the **Company Policy** area of the Resources page, but this acknowledgement will not be recorded in the report for the event.

8 In the **Security Groups** area, choose the employee security groups who should read the policy. 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: Click  if you want to distribute the policy to all employees. For more information about 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. When employees log on, they can choose to read the policy 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 of 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. The number of policies that you include in an event is up to you. However, you may want to include only one policy so that you can easily report on which employees have read or acknowledged it. 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, such as where to go for related training.

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 select **Company Policy**.

Your available content

The screenshot shows the ADP Portal Administrator interface. At the top, there's a navigation bar with 'Home', 'Workflow Setup', 'Security Access', 'Configuration', and 'Reports'. The 'Configuration' tab is active. Below the navigation bar, there's a 'Configurable Events' section with a message: 'Your event was successfully created.' Below this is the 'Event Configuration' section. It includes fields for 'Type' (set to 'Company Policy'), 'Name' (set to 'Cell Phone Policy Event'), 'Description', 'Start Date' (10/15/2009), 'End Date' (11/01/2009), and a checked 'Prompt at Login' checkbox. To the right of these fields is the 'Security Groups' section, which has two lists: 'Available Groups' (containing 'admin practitioner') and 'Selected Groups' (containing 'employee manager'). Below the 'Event Configuration' section is the 'Configure This Activity' section. It has two lists: 'Available' (containing 'Welcome', 'Company Policy', and 'Closing Statement') and 'Selected' (which is empty). Arrows between the lists allow moving items. At the bottom of the 'Configure This Activity' section are buttons for 'Save', 'Preview', 'Done', and 'Cancel'. The footer of the page includes '© 2009 Automatic Data Processing' and links for 'Privacy' and 'Legal'.

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**.

This screenshot is similar to the previous one, but now 'Company Policy' has been moved from the 'Available' list to the 'Selected' list. The 'Available' list now only contains 'Welcome' and 'Closing Statement'. The 'Selected' list contains 'Company Policy'. The 'Configure This Activity' section now shows 'Company Policy' in the 'Selected' list. Below the 'Selected' list, there's a section for 'Activity Name/Title' (set to 'Company Policy') and a checkbox for 'Required (The user cannot skip this activity)'. Below this is a link: 'Select policies included in this event'. The 'Save', 'Preview', 'Done', and 'Cancel' buttons are still at the bottom. The footer remains the same.

- 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.

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.

Approvals and Notifications

Cell Phone Policy Event Activities Step 1 of 1

Using Your Cell Phone at Work

Policy Acknowledgements.
To read and acknowledge a policy, click the policy name.

Policy Name	Version	Required	Acknowledged	Acknowledge Date	Expiration Date
Cell Phone Use Policy	V1.0	Yes			11/01/2009

Previous Next Done Cancel

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

ADP

Portal Administrator

Configurable Events

Event Configuration

Your event was successfully created. Click Save to save your changes.

Type: ▶

Name: ▶ Cell Phone Use Policy

Description: ▶

Start Date: ▶ 10/15/2009

☒ Prompt at Login

Select Policies

Policy Name	Version	Description	Expiration Date
<input type="checkbox"/> Accident Reporting Policy	1.0	How and when to report accidents	10/05/2009
<input checked="" type="checkbox"/> Cell Phone Use Policy	V1.0	This policy outlines acceptable cell phone use.	10/05/2009
<input type="checkbox"/> Lunch Policy	1	Company Lunch Policy	10/01/2009
<input type="checkbox"/> Parking Lot Policy	1.0	Parking lot policy	10/05/2009
<input type="checkbox"/> Travel Expense - End of Month Policy	1.0	Processing procedures for end of month reporting	10/05/2009
<input type="checkbox"/> Vacation Policy	1	This is our company vacation policy	09/30/2009
<input type="checkbox"/> Visitor Policy	2.0	Regarding business and non business visitor access to facilities.	10/05/2009

Done Cancel

Selected Groups

- 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 To enter text for the welcome or closing message, click the **Content Management System** link to the right of the **Selected** list.
- 9 Click the **Editor** check box.

Editor check box

System Field Name	Field Label	Editor	Visible	Base Order	Custom Order
content	Please enter welcome message for this event activity.	<input checked="" type="checkbox"/>			

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

The screenshot shows the ADP Portal Administrator interface. At the top, there's a navigation bar with 'Portal Administrator' selected. Below it, a 'Configurable Events' section is visible. The main content area is titled 'Welcome to Self Service Configuration' and includes a text editor. The editor's toolbar shows options for font (Arial), size (2 (10 pt)), bold, italic, underline, bulleted list, numbered list, link, unlink, and help. The text area contains the message: 'Please read and acknowledge this important policy that defines appropriate cell phone use.' To the right of the text area is a table with four columns: 'Editor', 'Visible', 'Base Order', and 'Custom Order'. The 'Editor' column has a checked checkbox. At the bottom of the page, there are 'Save' and 'Reset' buttons.

- 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. For example, if you are rolling out a policy on emergency events, you may want to send the employees to the Emergency Contacts page to confirm that their information is up to date. (See [“Appendix: Adding Smart Links to ADP Workforce Now Pages” on page 101](#) for detailed instructions on adding the link.)

11 Click **Save**. You are returned 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. If the event includes more than one step, navigate to the next step by clicking **Next**.

14 Click **Return**. You are returned 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 **Done**.

Important: When you click **Done**, 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 any of the event's details, such as 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 **Event Configuration**.
- 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. Doing so will prevent the event from expiring.

Notifying Employees of a Company Policy

You can send an e-mail 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 to them. Later, you may want to send a reminder to only the employees who have not read or acknowledged the policy, which may be particularly useful if an end date is approaching.

To set up an e-mail notification, do the following:

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

Send Notification option

ADP Welcome, Carl Harper
[Edit page content](#) [More Information...](#) [Support](#) | [Company Directory](#) | [Log Off](#)
 Search Company Directory

Portal Administrator | Home | Workflow Setup | Security Access | **Configuration** | Reports

Configurable Events

Event List

This page displays details for defined configurable events. Select Current to view new, pending, or active events. Select History to view expired events.

To add new events, click Add new event. To update or view details for an existing event, click the underlined event Name. To send email notification for a pending or active event, click Send Notification. To view employee completion details for active and expired events, click View Reports. To delete a new or pending event, click Delete.

View: **Current** [Add New Event](#)

Name	Type	Status	Prompt at Login?	Start Date	End Date	
Internet Usage Policy	Company Policy	Active	No	10/08/2009		Send Notification View Report
Hiring of Relatives Policy	Company Policy	Active	Yes	10/08/2009		Send Notification View Report
Clean Desk Policy	Company Policy	Active	Yes	10/08/2009		Send Notification View Report
Telephone Usage Policy	Company Policy	Active	Yes	10/08/2009		Send Notification View Report
Calculating Federal Tax Withholding Policy	Company Policy	Active	Yes	10/09/2009		Send Notification View Report
Test	Company Policy	New	No	10/09/2009		Delete
Cell Phone Policy Event	Company Policy	Pending	Yes	10/15/2009	11/01/2009	Send Notification Delete
Company Policy Test	Company Policy	New	No	11/11/2009		Delete

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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.

- 4 Provide the appropriate information. You must make a selection in the **Send to** field and enter information in the **From**, **Subject**, and **Body** fields.

In this example, an e-mail notification is set up for a cell phone policy.

The screenshot shows the 'Configurable Events' page in the ADP Workforce Now Portal Administrator. A 'Send Email Notification' dialog box is open, allowing configuration for a specific event. The dialog includes fields for 'To Groups', 'Send to', 'From', 'Subject', and 'Body'. The 'Send to' field has two radio buttons: 'Everyone' (selected) and 'Employees who have not completed the activity'. The 'From' field is set to 'manager@companyz.com'. The 'Subject' is 'Cell Phone Policy'. The 'Body' contains a message about a new cell phone policy. Below the dialog, a table lists configured events with columns for Start Date, End Date, and actions (Send Notification, View Report, Delete).

Start Date	End Date	Actions
09/29/2009	10/15/2009	Send Notification View Report
10/01/2009		Send Notification View Report
10/01/2009		Send Notification View Report
10/05/2009	10/31/2009	Send Notification View Report
	10/09/2009	Delete

- 5 Click **Send**. You are returned to the Event Configuration 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: You cannot change policy content once the start date has been reached for the associated event because the policy has been rolled out to employees. However, you can add a new policy and then roll it out 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, enter or update the description.

In this example, a cell phone policy is added.

Company Policy ?

Edit Policy

Enter information in each field below. Fields with a ▶ are required fields.

Policy Name: ▶ Cell Phone Use Policy

Version: ▶ V1.0

Description: This policy outlines acceptable cell phone use during business hours.

Policy Content: ▶ ☐ Hyperlink ☒ Document

cell_phone_use_policy.doc **Delete** **Preview**

☒ **Acknowledgement Required**

☒ I agree that my company (not ADP) is responsible for any policies that are uploaded to this ADP application and that ADP does not review, approve or have any liability whatsoever to my company or any third party with respect to such policies.

Save **Save As...** **Cancel**

- 5 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.

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

If You Select	Then
Hyperlink	In the Hyperlink field, enter the URL to the new 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, .pdf, .htm, and .html.

- 7 To change whether or not acknowledgement of the policy is required, either click to select or click to clear the **Acknowledgement Required** check box.
- 8 Click to select the check box next to the liability agreement. You must accept this agreement in order to save your changes.
- 9 Do one of the following:
- Save your changes using the same version number by clicking **Save**. You are returned 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**. You are returned 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.

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.

ADP
Welcome, Carl Harper
Edit page content More Information...

Portal Administrator Home Workflow Setup Security Access Configuration Reports

Resources

Resources
This page includes policies, forms, and links that enable you to access your employee and benefit information.

Sample Content

Company Policy

☒ The selected policies have been successfully deleted.

Manage Policies

Click **Add New Policy** to add a policy, or click a Policy Name to edit a policy. To delete a policy, select the checkbox next to the policy you wish to delete and click **Delete**.

Add New Policy

<input type="checkbox"/>	Policy Name	Version	Description	Creation Date
<input type="checkbox"/>	Accident Reporting Policy	1.0	How and when to report accidents	10/05/2009
<input type="checkbox"/>	Parking Lot Policy	1.0	Parking lot policy	10/05/2009
<input type="checkbox"/>	Travel Expense - End of Month Policy	1.0	Processing procedures for end of month reporting	10/05/2009
<input type="checkbox"/>	Vacation Policy	1	This is our company vacation policy	09/30/2009
<input type="checkbox"/>	Visitor Policy	2.0	Regarding business and non business visitor access to facilities	10/05/2009

Delete Done

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Quick Links

Adding Content - Add links for benefit and compensation information. Samples are below.
Add links for benefit and compensation information. Samples are below. To add content, select the tab.

[My 401K](#)
[My Benefits](#)
[My Career](#)
[My Expenses](#)
[My Hours](#)
[My Pay Statement](#)
[My Personal Info](#)

On Line Tools

Adding Content - Add links for additional tools that may be helpful to your employees.
Add links for additional tools that may be helpful to your employees. To add content, select the Customization tab.

[State Tax Forms](#)
[Retirement Planner](#)
[Payroll Calculator](#)
[Sample Content](#)

- 4 Click **Delete**.
- 5 Click **OK** to confirm the deletion. You are returned to the updated Manage Policies 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 e-mail notification alerting them to the change.

What Happens After You Stop an Event

After you stop an event:

- You cannot send any more e-mail notifications about the event to employees.
- Employees no longer receive a message about the policy when they log on to ADP Workforce Now, if you are using this feature.
- Employees no longer view the event in the **Activities** area of their Approvals and Notifications page.
- The event is moved from the Current list to the History list on the Event Configuration 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 employees 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 on this page for your records. You can also 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 **Event Configuration**.
- 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 Configuration 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 89.](#))

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 **Event Configuration**.
- 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. You are returned to the updated Event Configuration page.

Checking Which Employees Have Completed an Event

After you roll out a company policy to employees, you can check which employees have completed the associated event and send an e-mail 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 **Event Configuration**.
- 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 **View** field, select a report. The options are:

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

Note: "In progress" means that the employee has started the event, but not finished it. For example, the employee may have only read the welcome message, or one of three policies included in the event.

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

This example shows which employees have not started a lunch policy event.

Welcome, Carl Harper

Support | Company Directory | Log Off

Portal Administrator | Home | Workflow Setup | Security Access | Configuration | Reports

Search Company Directory

Configurable Events

This page allows you to view employee completion details for active and expired events. You can see whether an employee has not yet started an event, is in progress, or has completed an event. To export the event details displayed on this page, click Export to .csv file.

Event Report - Company Policy

Description:	Lunch Policy	Security Groups:	Employee, Manager
Start Date:	10/01/2009	Status:	Active
End Date:		Prompt At Login:	No

Total Number of all eligible employees: 214
 Number of Employees who have not started: 211
 Number of Employees who are in progress: 3
 Number of Employees who have completed: 0

View: Employees not yet started Rows per page: 25

211 Found | 1-25 | 26-50 | 51-75 | 76-211 |

Name	Status
7L, C	Not Started
Albright, Anthony	Not Started
Amazeen, Todd A	Not Started
Andrews, Tom	Not Started
Assign1, Manual1	Not Started
Assign2, Manual2	Not Started
Barbato, Samuel	Not Started
Barrow, Gary	Not Started
Benefits, New Hire For	Not Started
Bennett, Patricia D	Not Started
Berkowitz, Wayne	Not Started

Return To List Export to .csv

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- 5 To export the data to a .csv file, click **Export to .csv**.
- 6 Do one of the following:
 - Open the file in Microsoft Excel by clicking **Open**.
 - Save the file to a specified location by clicking **Save**.
- 7 To return to the Event Configuration page, click **Return to List**.

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

Frequently Asked Questions

Q: *What happens to the policies I had on my site before I upgraded to ADP Workforce Now V1.2?*

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

Employees can view 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. The employees need to complete the event in order for their acknowledgement status to be included in the event's acknowledgement report.

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: *If an existing policy is rolled out through a new event, and some employees have acknowledged the policy already, will they need to acknowledge it again?*

A: No, ADP Workforce Now keeps track of which policies have been acknowledged. However, these employees will still need to complete the event, which may involve reading other content such as a welcome message, additional policies, and a closing message.

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, which they can view in the **Activities** area of the Approvals and Notifications page. New hires are assigned to security groups, 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 read or acknowledge, don't enter an end date when you set up the associated event. Doing so keeps the event active and enables you to report on which employees have completed the event.

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 read or acknowledged all the policies in the event?*

For employees: The event is removed from the **Activities** area on the Approvals and Notifications page. The policies, however, remain in the **Company Policy** area of the Resources page. Here, employees can still read or acknowledge the policies by clicking the **Read and acknowledge all policies** link.

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

The report created for this event lists the status of the employees who have not read or acknowledged all the policies as one of these:

- “Not yet started” - the employees have not read any content in the event
- “In progress” - the employees have read or acknowledged some of the content in the event, but not all of it

Tip: For events with multiple policies, don't enter an end date. This will keep the event active and enable you to report on which employees have completed the event.

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 read or 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 e-mail notification, will I be informed if any e-mails are not delivered due to incorrect or invalid e-mail addresses?

A: You can find out which e-mail notifications were not delivered if you enter your real e-mail address in the **From** field on the e-mail notification setup page. You will then receive notifications about which e-mails were not delivered.

Tip: The number of e-mail notifications that are not delivered can be reduced if employees keep their e-mail address up to date on the Addresses page. On this page, employees can specify an e-mail address to be used for notification purposes. Employees can access the Addresses page by pointing to **Personal Information** and selecting **Addresses**.

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

A: The report you get when you click **View Reports** next to an event on the Event Configuration page tells you the following:

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

An event is not considered completed until all the content included in it has been read or acknowledged. If an event includes more than one policy, the report does not specify which policies were read or acknowledged.

Tip: For events that include multiple policies, don't enter an end date. This will keep the event active and enable you to report on which employees have completed the event.

Note: The reports you read 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. However, you may want to include only one policy so that you can easily report on which employees have read or acknowledged it.

Tip: For events that include multiple policies, don't enter an end date. This will keep the event active and enable you to report on which employees have completed the event.

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.

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.

ADP provides practical information concerning the subject matter covered and this information is provided with the understanding that ADP is not rendering legal advice or other professional services. The material or suggestions made available to you is not a substitute for legal advice or your professional judgment.

Chapter 5

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

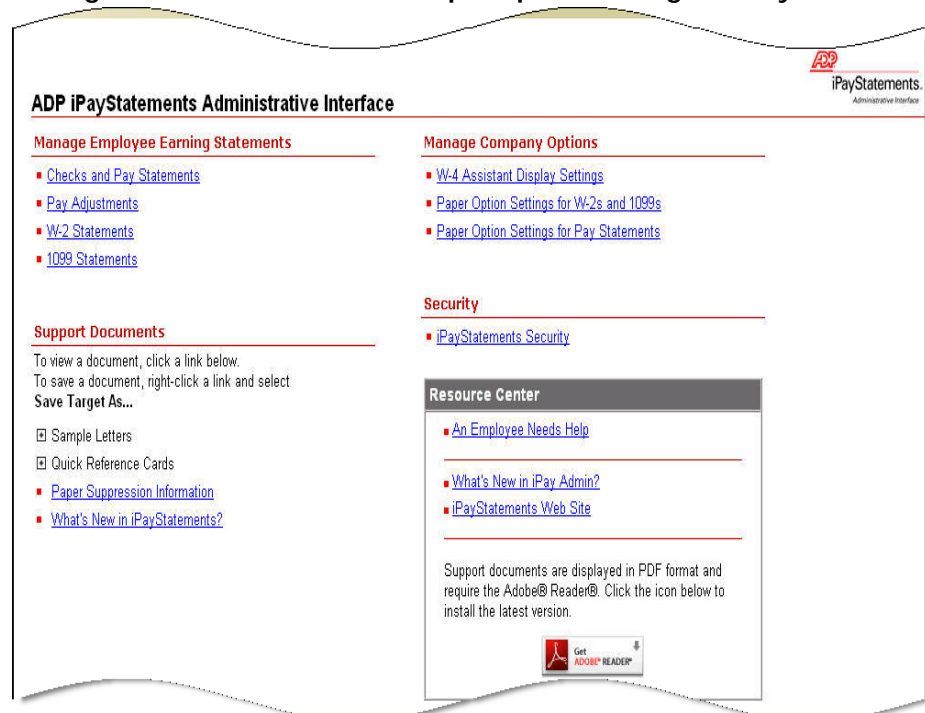
Note: You must be in the employee role to view this information.

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).

- 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:

- Point to the Role Selector and select **Employee**.
- On the **Pay & Taxes** menu, select any menu item.
- In the **Financial Tools** section of the page, click the pencil icon.

Make sure you have clicked to select the **Edit page content** check box.

ADP Workforce Now portal interface. The 'Financial Tools' section is visible, showing a list of calculators and links. The 'Edit page content' checkbox is checked. The 'Financial Tools' section lists various calculators: Salary Paycheck Calculator, Hourly Paycheck Calculator, Gross Pay Calculator, 401k Planner, 403(b) Planner, Employee Stock Option Calculator, and W-4 Assistant. The 'Tools & Links' section shows links for My 401K, My Expenses, and My Hours.

- In the **Visible** column, click to select the check box for each calculator that you want to display.

Click to display the associated calculator.

ADP Workforce Now portal interface. The 'Welcome to Self Service Configuration' page is visible, showing a table of calculators and their configuration options. The 'Visible' column has checkboxes for each calculator. The 'Tools & Links' section shows links for My 401K, My Expenses, and My Hours.

System Field Name	Field Label	Editor	Authorized Groups	Visible	Base Order	Custom Order
Instructions	Click a link to help you estimate some of your most important financial calculations.	<input type="checkbox"/>	Assign Group(s)	<input checked="" type="checkbox"/>		
hourlyPayCheckCal	Hourly Paycheck Calculator	<input type="checkbox"/>		<input type="checkbox"/>	2	2
grossPayCal	Gross Pay Calculator	<input type="checkbox"/>		<input checked="" type="checkbox"/>	3	3
planner401a	401k Planner	<input type="checkbox"/>		<input checked="" type="checkbox"/>	4	4
planner401b	403(b) Planner	<input type="checkbox"/>		<input checked="" type="checkbox"/>	5	5
stockOption	Employee Stock Option Calculator	<input type="checkbox"/>		<input checked="" type="checkbox"/>	6	6
salaryPaycheckCal	Salary Paycheck Calculator	<input type="checkbox"/>		<input checked="" type="checkbox"/>	8	8
w4Assistant	W-4 Assistant	<input type="checkbox"/>		<input checked="" type="checkbox"/>	9	9

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 users 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 users directly to their benefits information.

You can also add a link within an e-mail that allows the e-mail 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 e-mail notifications that managers or practitioners are sent through workflow to notify them of action required or action taken.

Adding smart links consists of the following tasks:

- Adding a link from one ADP Workforce Now page to another
- Adding a link from an e-mail to an ADP Workforce Now page

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
	Approvals and Notifications	/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
	Personal Task Assistance 1	/wps/myportal/Employee/Home/PersonalTaskAssistance1
	Personal Task Assistance 2	/wps/myportal/Employee/Home/PersonalTaskAssistance2
	Personal Task Assistance 3	/wps/myportal/Employee/Home/PersonalTaskAssistance3
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/MyAccruals
	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
Pay & Taxes	Welcome	/wps/myportal/Employee/PayTax/Welcome
	Pay Statements	/wps/myportal/Employee/PayTax/PayStatements
	Pay Card	/wps/myportal/Employee/PayTax/PayCard

ADP Workforce Now Menu	Option Page	URL
	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
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

ADP Workforce Now Menu	Option Page	URL
	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
	Approvals and Notifications	/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
	Manager Task Assistance 1	/wps/myportal/Manager/ManagerTaskAssistance1
	Manager Task Assistance 2	/wps/myportal/Manager/ManagerTaskAssistance2
Time & Attendance	Manager Task Assistance 3	/wps/myportal/Manager/ManagerTaskAssistance3
	Home	/wps/myportal/Manager/TimeAttendance/Home
	Timecards	/wps/myportal/Manager/TimeAttendance/Timecards
	Schedules	/wps/myportal/Manager/TimeAttendance/Schedules
My Team	Employees	/wps/myportal/Manager/TimeAttendance/Employees
	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
Recruiting	Proxy Assignment	/wps/myportal/Manager/MyTeam/ProxyAssignment
	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

ADP Workforce Now Menu	Option Page	URL
Reports	HR & Benefits Reports	/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
	Approvals and Notifications	/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
	Task Assistance 1	/wps/myportal/Practitioner/Home/TaskAssistance1
	Task Assistance 2	/wps/myportal/Practitioner/Home/TaskAssistance2
	Task Assistance 3	/wps/myportal/Practitioner/Home/TaskAssistance3
HR & Benefits	Home	/wps/myportal/Practitioner/HRBenefits/Home
	Company	/wps/myportal/Practitioner/HRBenefits/Company
	Benefits	/wps/myportal/Practitioner/HRBenefits/Benefits
	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

ADP Workforce Now Menu	Option Page	URL
	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
Payroll (for Payroll module)	Total Pay iNet	/wps/myportal/Practitioner/Payroll/TotalPayiNet
	Home	/wps/myportal/Practitioner/Payroll/Home
	Employees	/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
Payroll/HR (for HR module)	Home	/wps/myportal/Practitioner/PayrollHR/Home
	Employees	/wps/myportal/Practitioner/PayrollHR/Employee
	Payroll	/wps/myportal/Practitioner/PayrollHR/Payroll
	Utilities	/wps/myportal/Practitioner/PayrollHR/Utilities
	Setup	/wps/myportal/Practitioner/PayrollHR/Setup
	Total Pay iNet	/wps/myportal/Practitioner/PayrollHR/TotalPayiNet
	General Ledger Interface	/wps/myportal/Practitioner/PayrollHR/GeneralLedgerInterface
	Welcome Center	/wps/myportal/Practitioner/PayrollHR/WelcomeCenter
	Pay Card	/wps/myportal/Practitioner/PayrollHR/PayCard
	iPay Admin	/wps/myportal/Practitioner/PayrollHR/iPayAdmin
Time & Attendance	Home	/wps/myportal/Practitioner/TimeAttendance/Home
	Timecards	/wps/myportal/Practitioner/TimeAttendance/Timecards
	Recurring Schedules	/wps/myportal/Practitioner/TimeAttendance/RecurringSchedules

ADP Workforce Now Menu	Option Page	URL
	End of Period	/wps/myportal/Practitioner/TimeAttendance/EndofPeriod
	Setup	/wps/myportal/Practitioner/TimeAttendance/Setup
	Maintenance	/wps/myportal/Practitioner/TimeAttendance/Maintenance
Recruiting & Staffing	Search	/wps/myportal/Practitioner/RecruitingStaffing/Search
	Application Management	/wps/myportal/Practitioner/RecruitingStaffing/Application-Management
	Postings	/wps/myportal/Practitioner/RecruitingStaffing/Postings
	Status	/wps/myportal/Practitioner/RecruitingStaffing/Status
	Communications	/wps/myportal/Practitioner/RecruitingStaffing/Communication
	Settings	/wps/myportal/Practitioner/RecruitingStaffing/Settings
	Resource Library	/wps/myportal/Practitioner/RecruitingStaffing/ResourceLibrary
	Welcome	/wps/myportal/Practitioner/RecruitingStaffing/Welcome
	Background Check	/wps/myportal/Practitioner/RecruitingStaffing/Background-Check
	Tax Credit Screening	/wps/myportal/Practitioner/RecruitingStaffing/TaxCreditScreening
	Employment Eligibility eI9	/wps/myportal/Practitioner/Recruiting-Staffing/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 Portal Administrator Pages

ADP Workforce Now Menu	Option Page	URL
Home	Welcome	/wps/myportal/Administrator/Home/Welcome
	Administrator Resources	/wps/myportal/Administrator/Home/AdministratorResources
	Company Directory	/wps/myportal/Administrator/Home/CompanyDirectory
	Approvals and Notifications	/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	Workgroup Definition	/wps/myportal/Administrator/WorkflowSetup/WorkgroupDefinition
	Membership Rules	/wps/myportal/Administrator/WorkflowSetup/MembershipRules
	Approval Path Definition	/wps/myportal/Administrator/WorkflowSetup/ApprovalPathDefinition
	Business Rules	/wps/myportal/Administrator/WorkflowSetup/BusinessRules
	Email Setup	/wps/myportal/Administrator/WorkflowSetup/EmailSetup
Security Access	Event Workflow	/wps/myportal/Administrator/WorkflowSetup/EventWorkflow
	Security Groups	/wps/myportal/Administrator/SecurityAccess/SecurityGroups
	Membership Rules	/wps/myportal/Administrator/SecurityAccess/MembershipRules
Configuration	View User	/wps/myportal/Administrator/SecurityAccess/ViewUser
	Company Directory	/wps/myportal/Administrator/Configuration/CompanyDirectory
Reports	Theme Configuration	/wps/myportal/Administrator/Configuration/ThemeConfiguration
	Policy Acknowledgement	/wps/myportal/Administrator/Reports/PolicyAcknowledgement

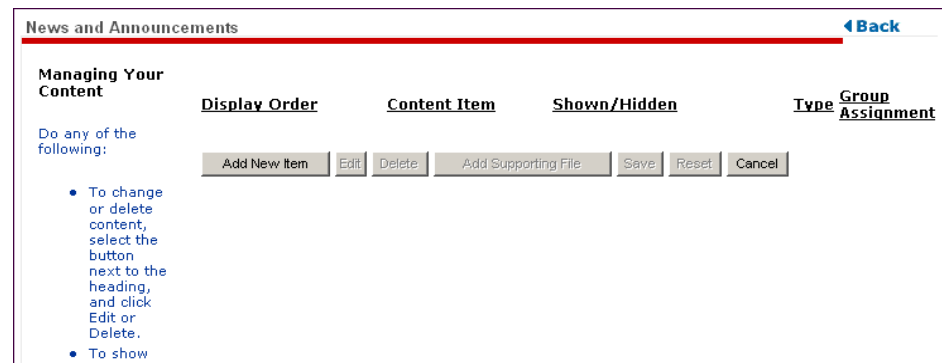
ADP Workforce Now Menu	Option Page	URL
	Audit Trail for Past Policies	/wps/myportal/Administrator/Reports/AuditTrailforPastPolicies

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 Navigate to the page and locate the section where you want to add a smart link. Then click  (Pencil/Configure icon).

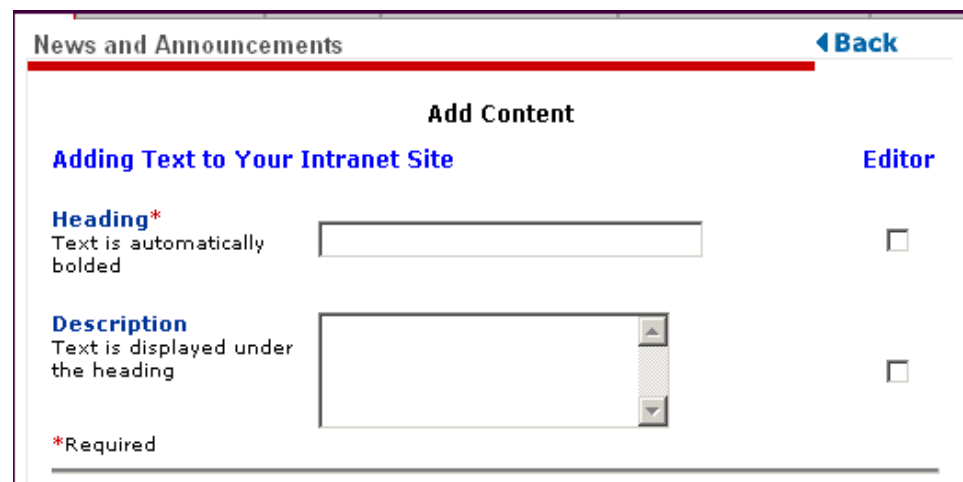
The Configuration page for the selected page displays.



The screenshot shows the 'Managing Your Content' page for 'News and Announcements'. It includes a 'Back' link, a table with columns 'Display Order', 'Content Item', 'Shown/Hidden', 'Type', and 'Group Assignment'. Below the table are buttons for 'Add New Item', 'Edit', 'Delete', 'Add Supporting File', 'Save', 'Reset', and 'Cancel'. A list of instructions is provided: 'Do any of the following: • To change or delete content, select the button next to the heading, and click Edit or Delete. • To show'.

- 2 Click **Add New Item**.

The Add Content page displays.



The screenshot shows the 'Add Content' page for 'News and Announcements'. It includes a 'Back' link and a section titled 'Adding Text to Your Intranet Site'. There are two main input areas: 'Heading*' with a text box and a checkbox labeled 'Editor', and 'Description' with a text box and a checkbox labeled 'Editor'. A note states 'Text is automatically bolded' for the heading and 'Text is displayed under the heading' for the description. A legend indicates '*Required'.

- 3 Enter a heading, then click to select the **Editor** check box to the right of the heading.

Note: In this example, we will make the heading a link to the Employee Direct Deposit page. If you want to make the description the link, add a description, then click to select the **Editor** check box to the right of the **Description** field and continue with the following instructions.

News and Announcements [Back](#)

Add Content

Adding Text to Your Intranet Site **Editor**

Heading*
Text is automatically bolded

Direct Deposit Information Update ☐

Description
Text is displayed under the heading

☐

*Required

4 The editor page displays with your heading displayed.

News and Announcements [Back](#)

Add Content

Adding Text to Your Intranet Site **Editor**

Heading*
Text is automatically bolded


B **I** **U**

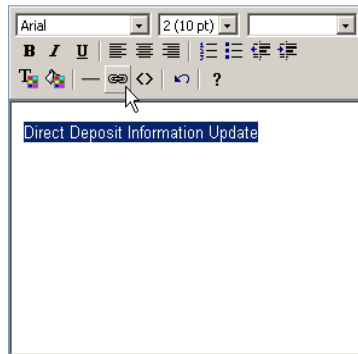
Direct Deposit Information Update ☒

Description
Text is displayed under the heading

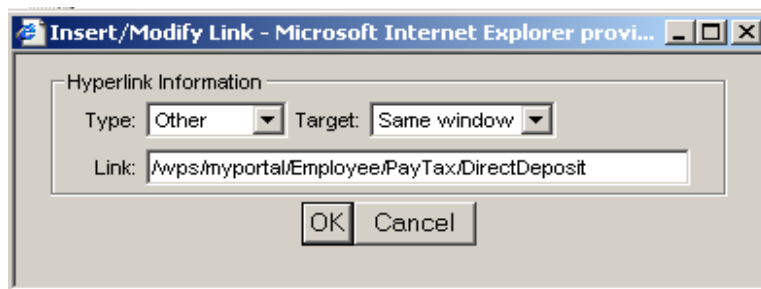
☐

*Required

- 5 Highlight the text and click .



- 6 The Hyperlink dialog box displays. Select **Type = Other**, **Target = Same Window** and in the **Link** field, enter the smart link from Tables 1 through 4. (For our example: `/wps/myportal/Employee/PayTax/DirectDeposit.`)
- 7 Click **OK**.



- 8 Click **Save**.
- 9 Click **OK**.
- 10 Click **Back**.

Your new content with the smart link (to another ADP Workforce Now page) is displayed.

Adding a Link from an E-mail to an ADP Workforce Now Page

You can also add a link within an e-mail that will allow the e-mail recipient to click the link, and after successfully logging on, immediately access the ADP Workforce Now area defined in the link.

Tip: If the link is to a standard user task (not a user who is a practitioner or a portal administrator), the user will log on with the user ID and password.

If the link is to a practitioner or a portal administrator task, the user will need to log on with the digital certificate, user ID, and password.

To add a link within an e-mail to an ADP Workforce Now page, do the following:

- 1** Create your e-mail. You can do one of the following:
 - Compose your own external e-mail.
 - Use the e-mail notifications available within ADP Workforce Now. (For more information, see “Chapter 2: Managing Approvals and Notifications” on [page 19](#).)
- 2** Add the appropriate smart link.

Note: Be sure to enter the smart URL link exactly as shown in Table 1 through Table 4, and then click your return key to create the hyperlink.

Example:

If you want to link to the Direct Deposit summary page, type the following in your e-mail:

`https://portal.adp.com/wps/myportal/Employee/PayTax/DirectDeposit`

When the recipient receives the e-mail, he or she can click the link and once successfully logged on, immediately access the ADP Workforce Now area defined in the link.

