ADP Workforce Now™ Portal Administrator Guide

Version 1.2

Contents

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.

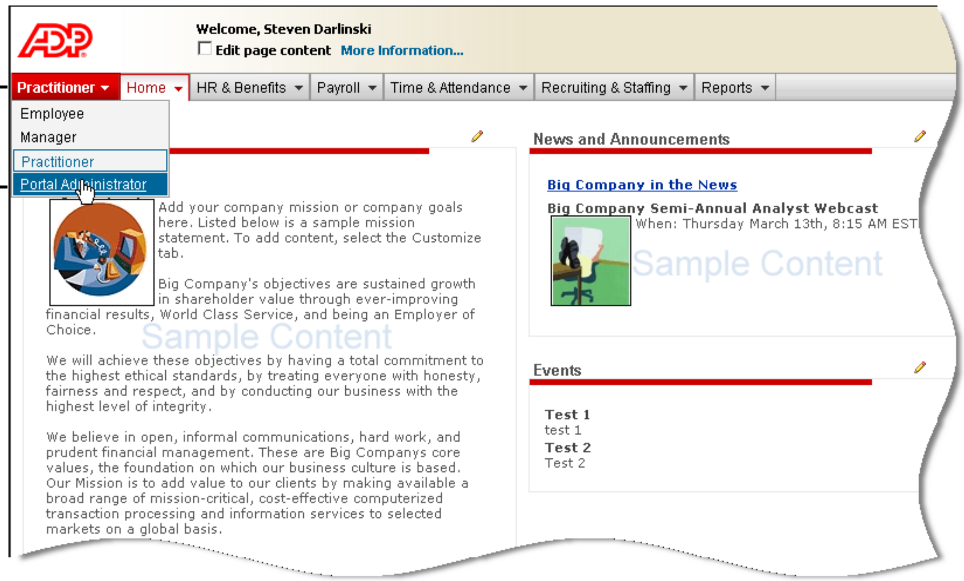
For more information about security, refer to the *ADP Workforce Now™ Security Guide.* This guide contains detailed information about assigning employees to security groups, creating custom security groups, setting user permissions (access to specific features in ADP Workforce Now), and defining membership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

Role Selector

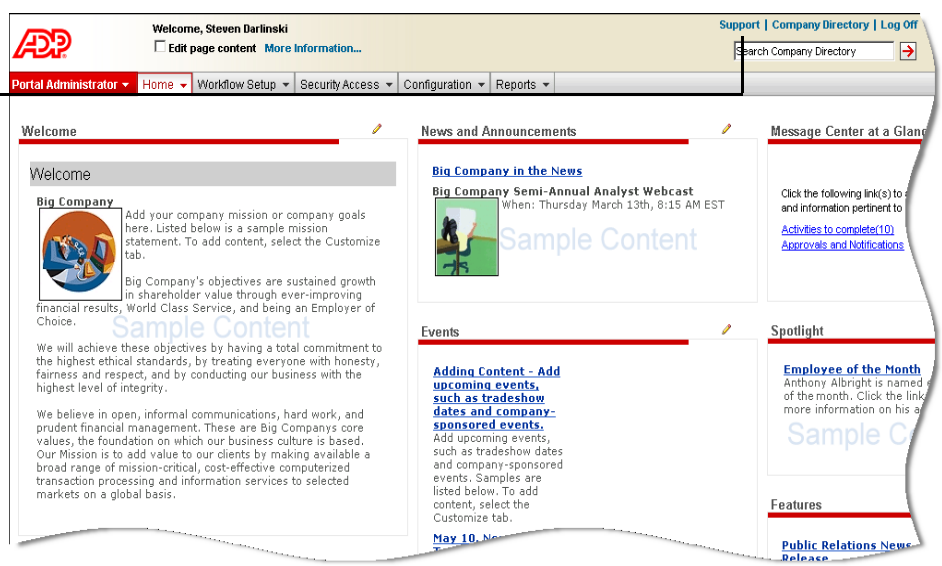
Menu item



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.

Support link



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.

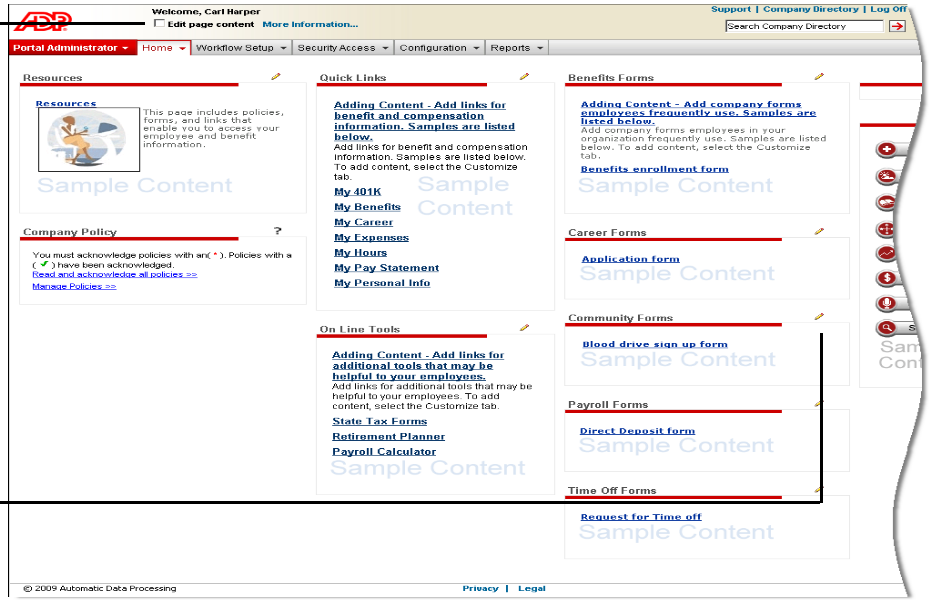
To add a content item, do the following:

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

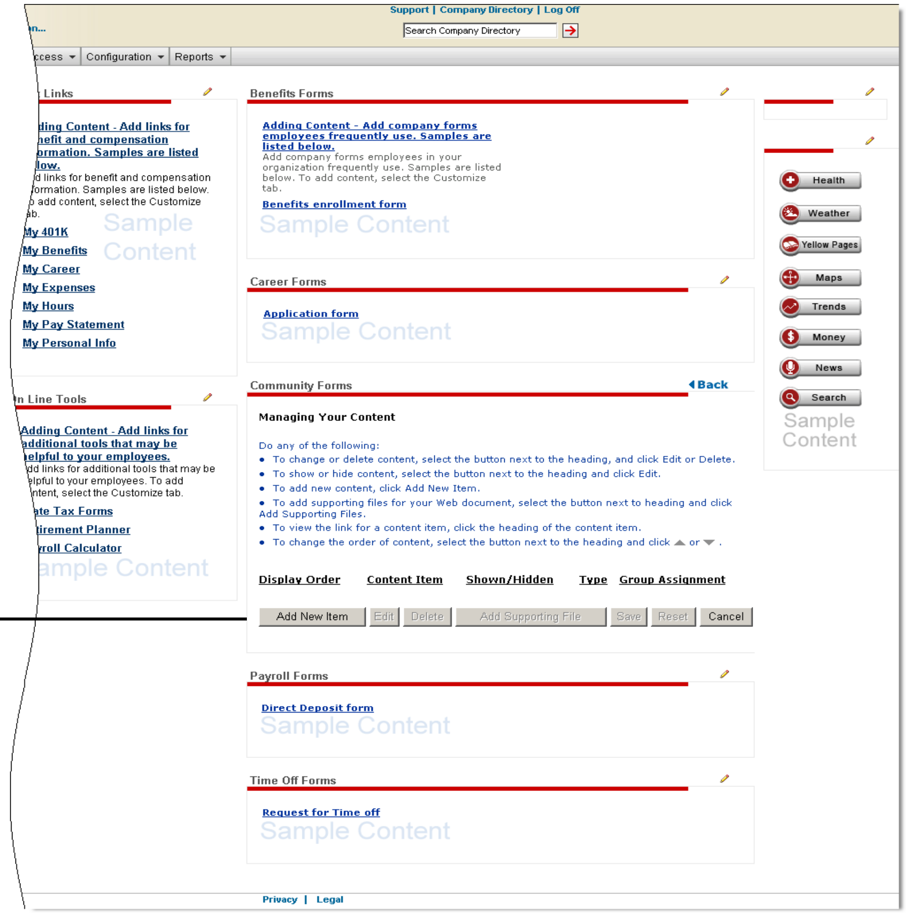
2 Click the pencil icon in the section of the page where you want to add content.

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

Edit tool on the Resources page



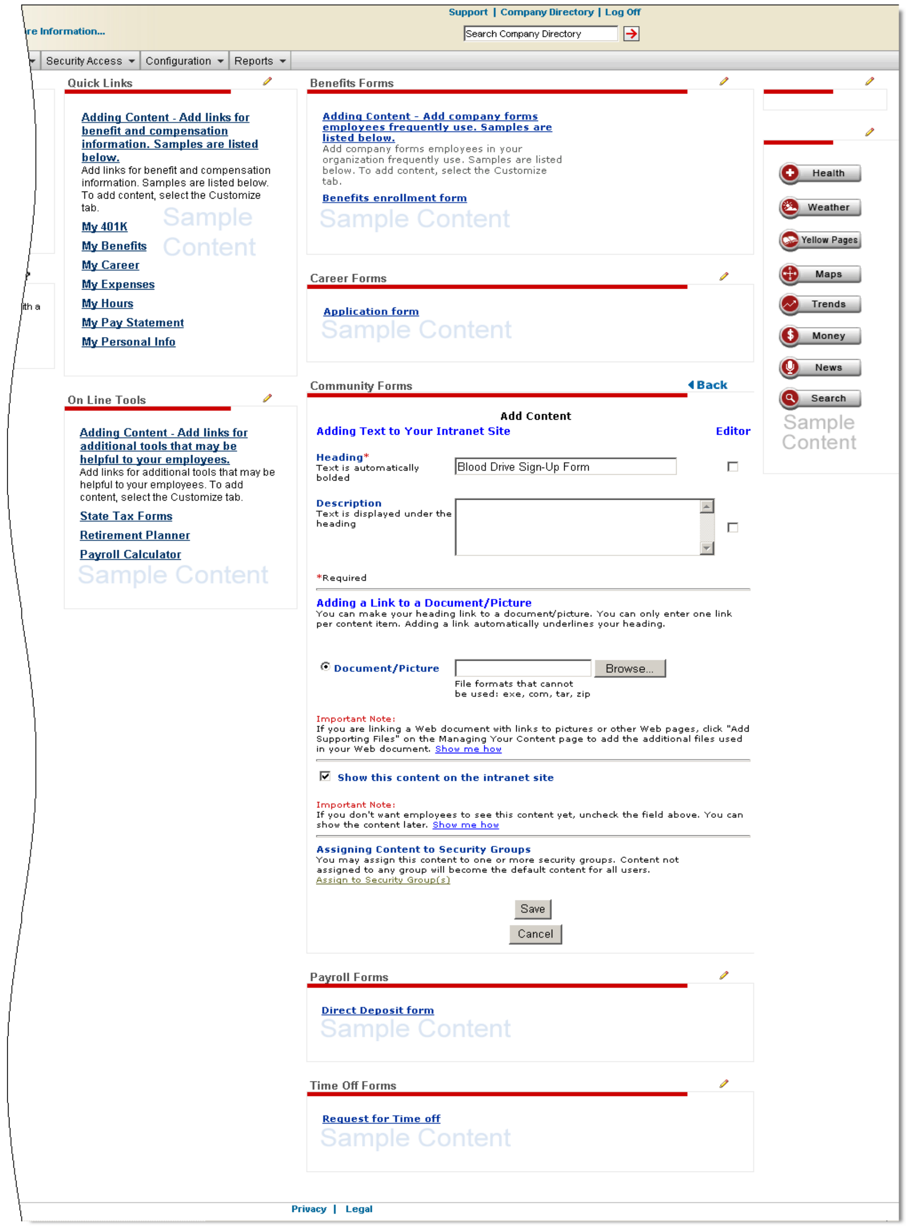
3 Click **Add New Item**.



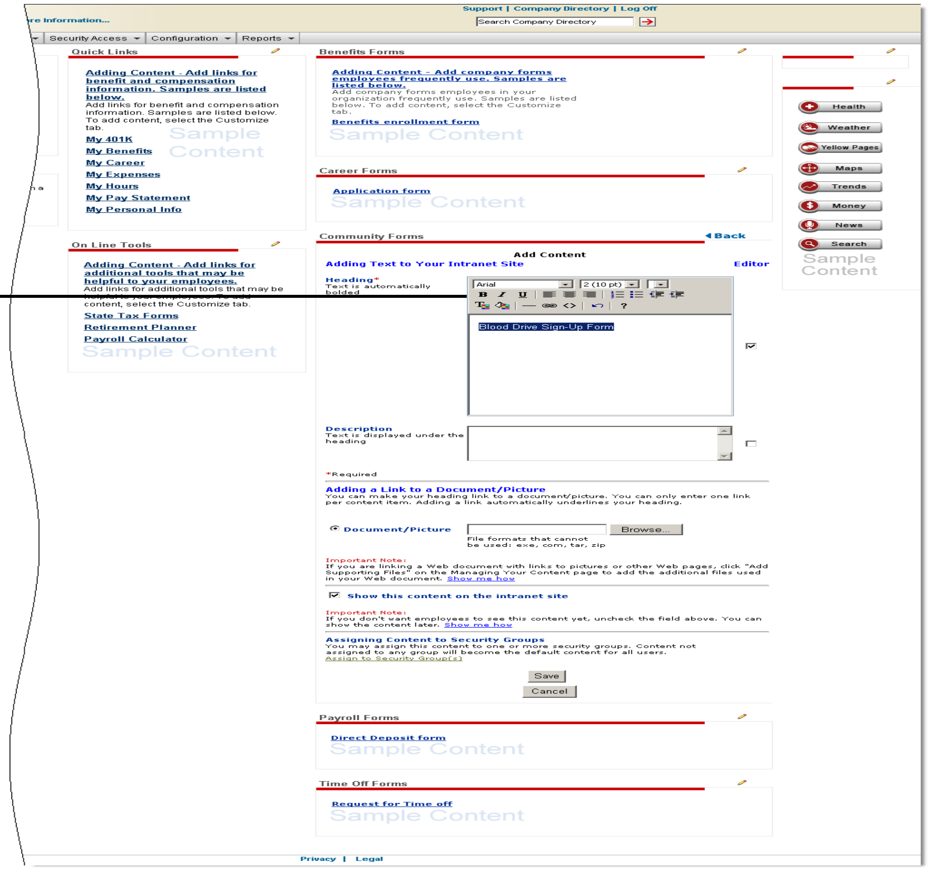
Add New Item button

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.



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.

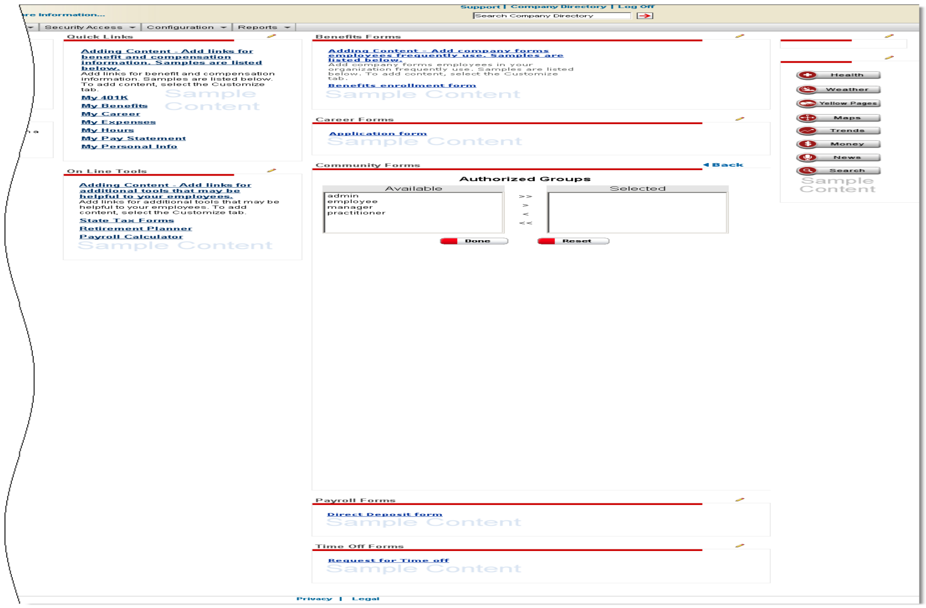
6 To link your heading to a document or picture, select **Document / Picture**, then click **Browse** to find the file. The maximum file size for documents and pictures is 5 megabytes.

- 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.

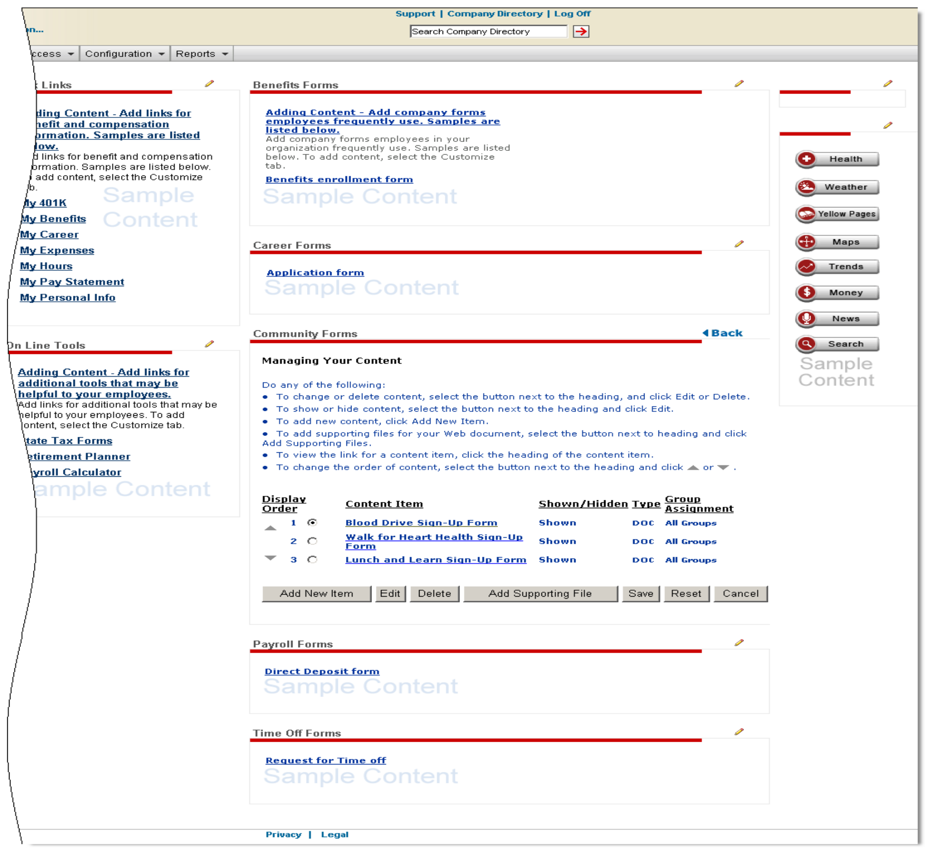
Detailed instructions for adding smart links are provided in the guide's appendix. (See "Appendix: Adding Smart Links to ADP Workforce Now Pages" on page 101.) The appendix provides tables that list the URL links available for the ADP Workforce Now pages. The tables are organized by role (employee, manager, practitioner, and portal administrator).

Updating Content

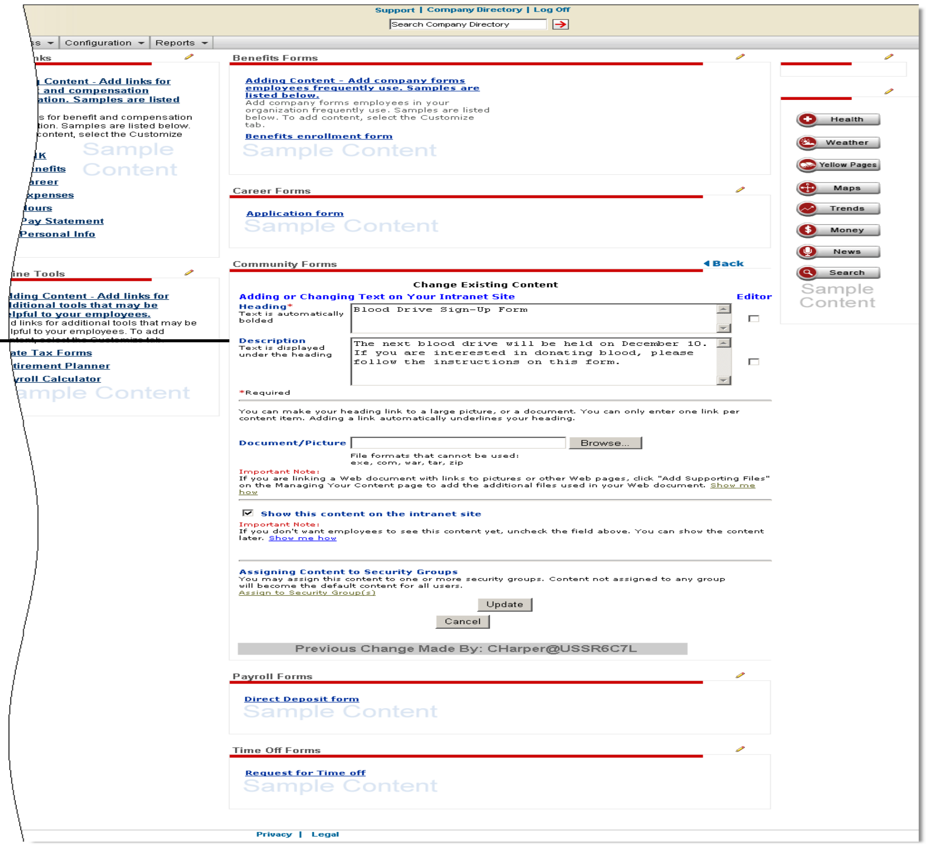
1 Point to **Home** and select **Welcome** or **Resources**.

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**.



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**.

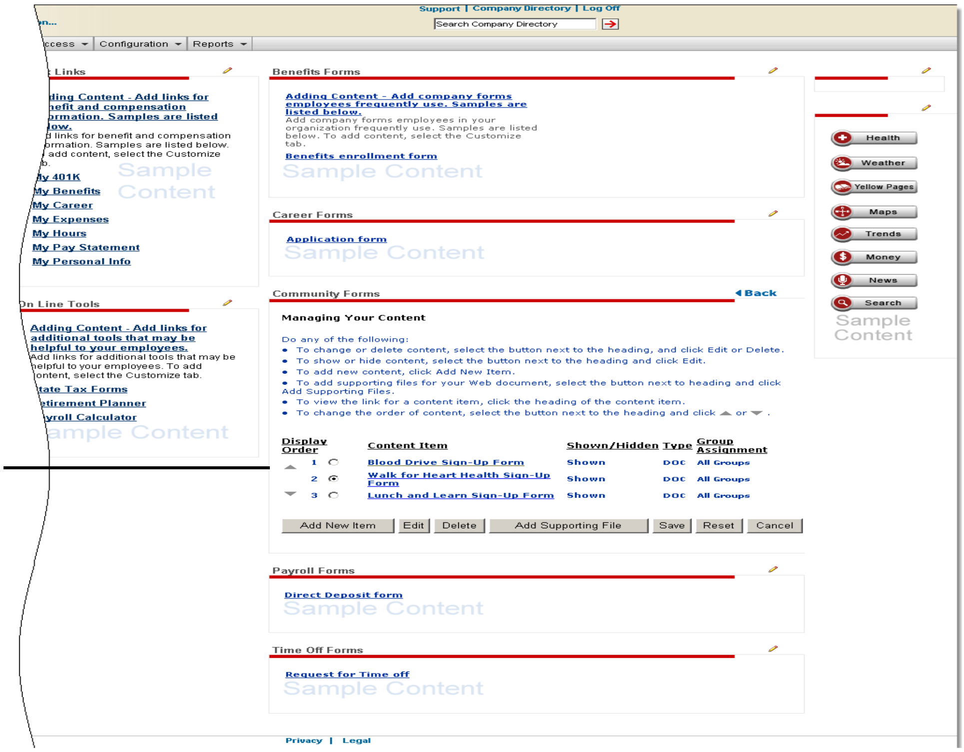
Changing the Display Order of Content

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.

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.

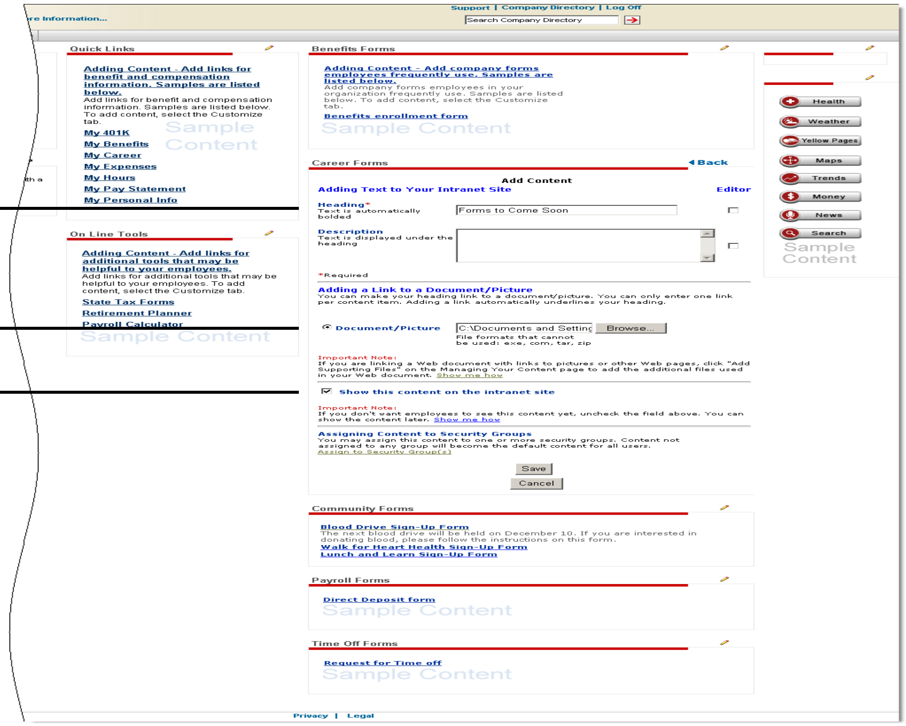
3 Click **Add New Item**.

4 Enter the appropriate information.

Enter a heading and, if necessary, a description.

Upload your graphic.

Choose to display the content now.

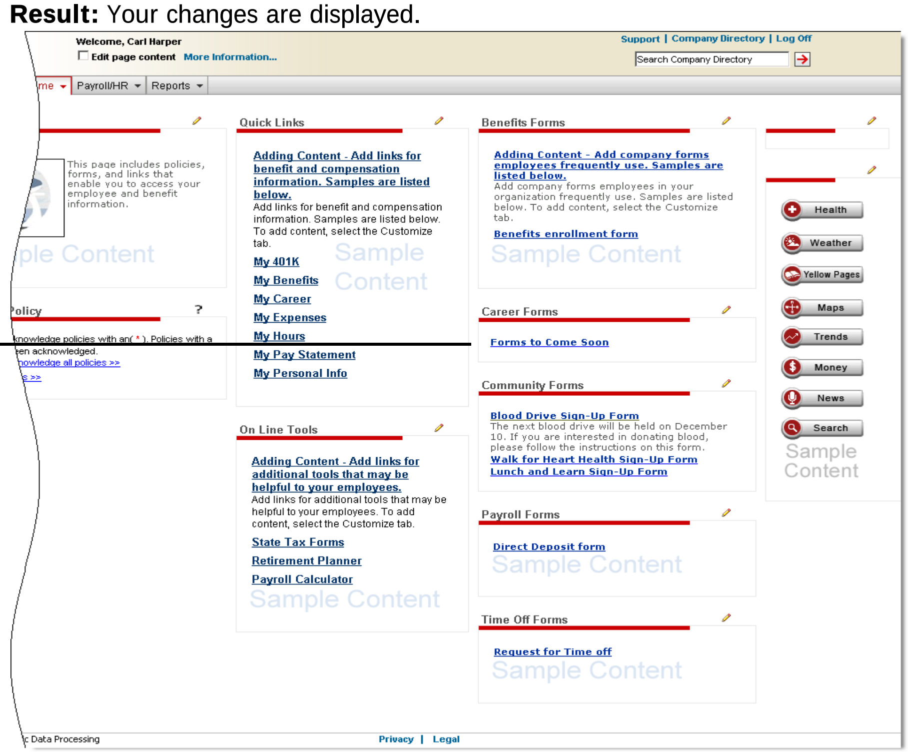


5 Click **Save**.

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.

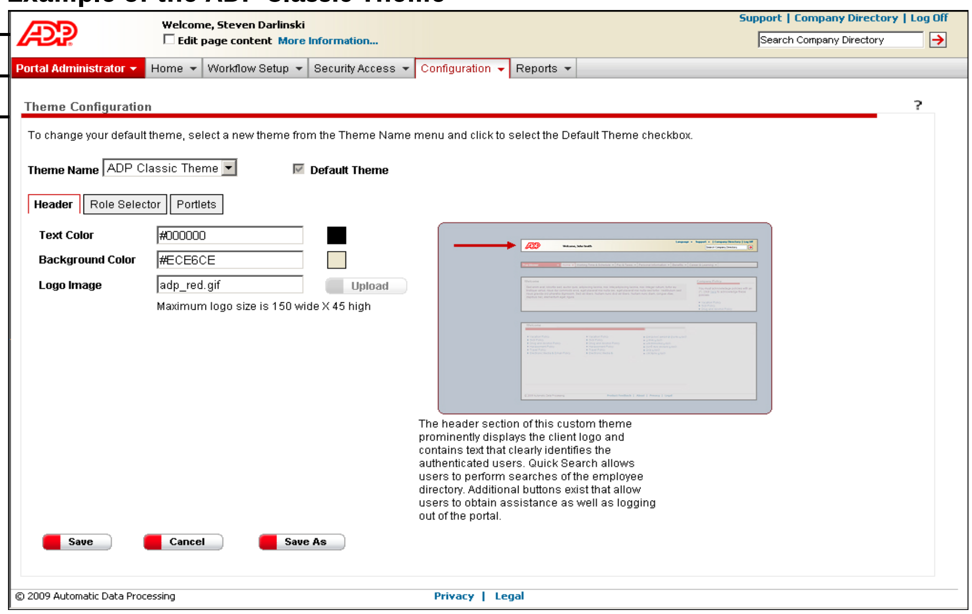
ADP provides three standard themes: the ADP Classic Theme, the Blue Theme, and the Silver Theme. By default, the ADP Classic Theme is applied to your site.

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)



Selecting a Standard Theme

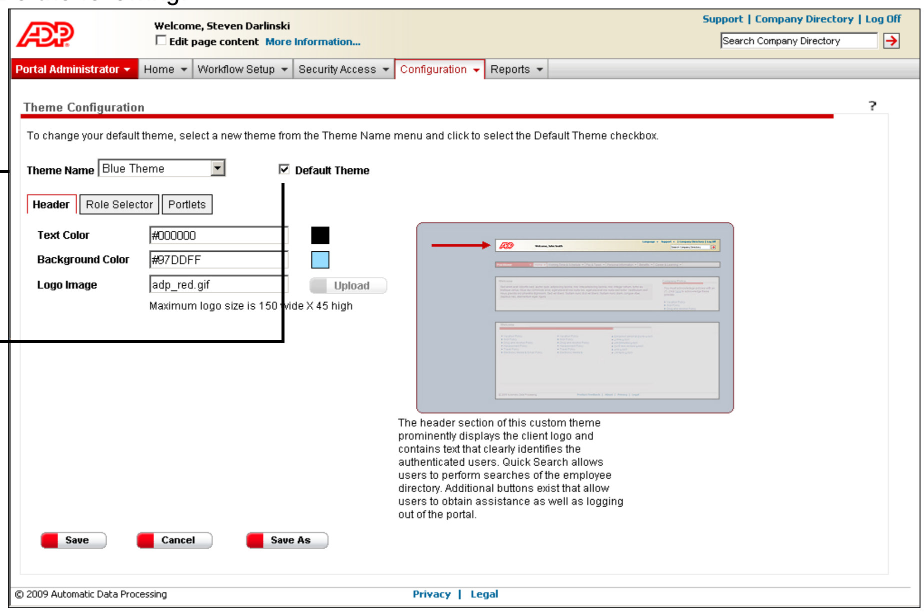
You can replace the ADP Classic Theme with either the Blue Theme or the Silver Theme.

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.

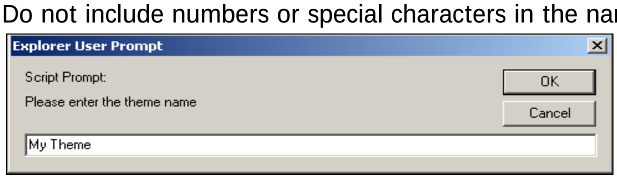
Creating a Custom Theme

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.

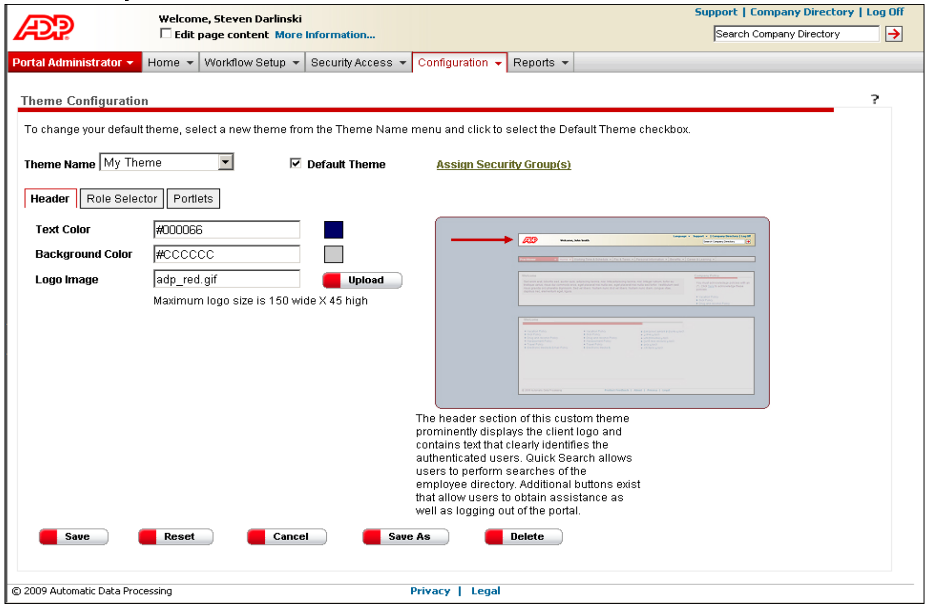


Result: Your new theme is now available in the list of items in the **Theme Name** field.

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

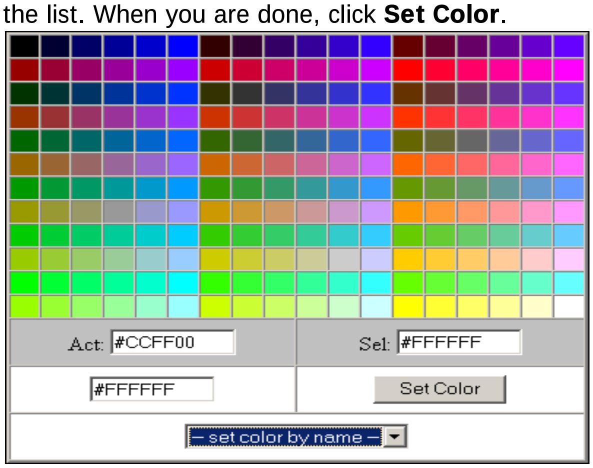
5 If you want this theme to be your default theme for your site, click to select the **Default Theme** check box.

6 Customize your header.

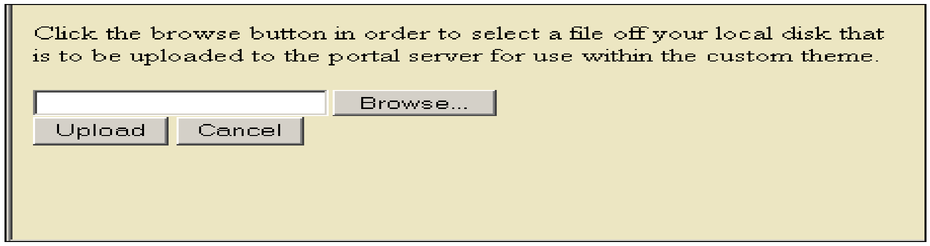


Choose a text color and background color by clicking the color box to the right of each field.

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



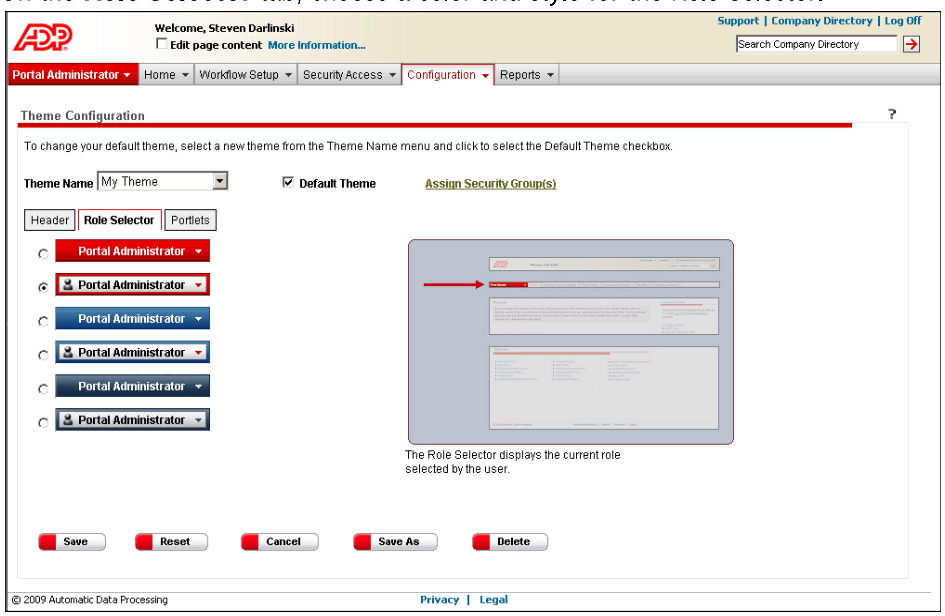
8 To update your logo, on the **Header** tab, click **Upload**. Click **Browse** to find the logo, and then click **Upload**.



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

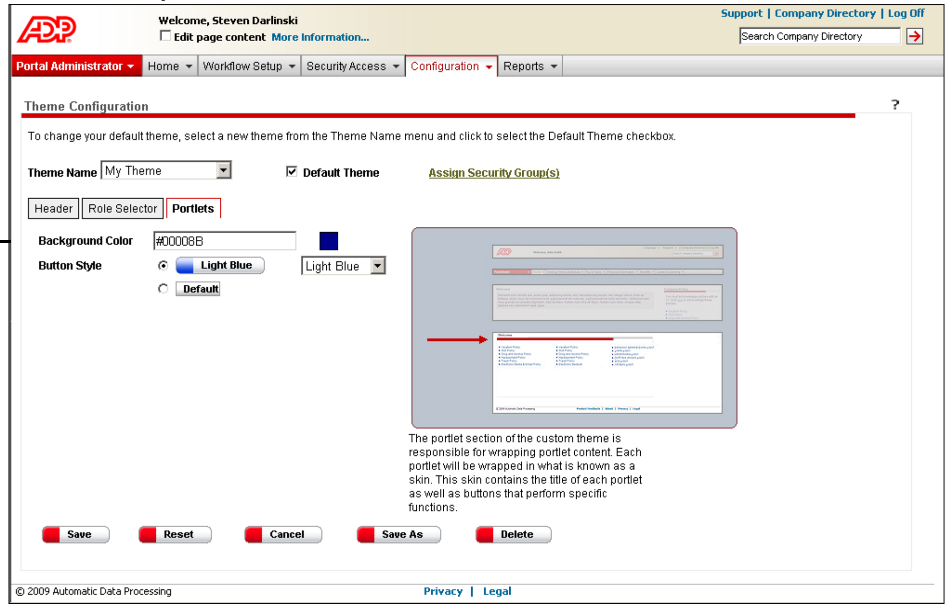
Important: Your logo must be sized at 150 width x 45 height pixels prior to upload. You can use Microsoft® Picture Manager or Paint to resize. Acceptable formats are BMP, JPG, JPEG, GIF, and PNG. No spaces or special characters should be included in the filename.

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



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.



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

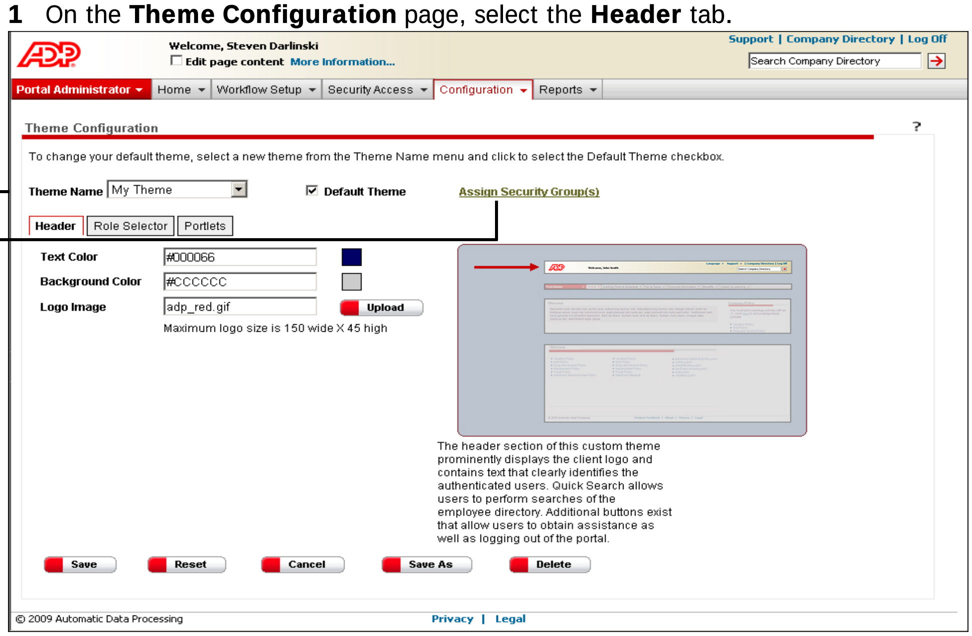
Assigning Custom Themes to Security Groups

You can only assign custom themes to specific security groups.

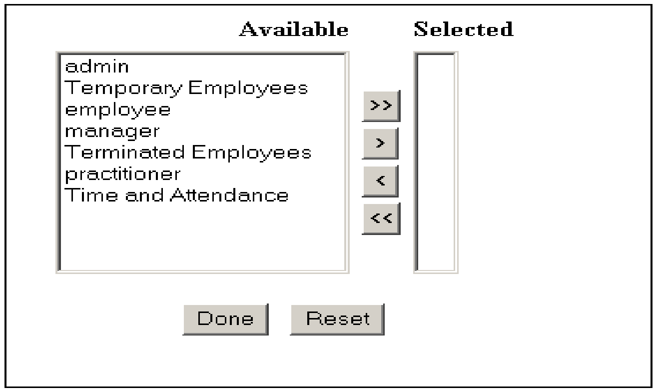
1 On the **Theme Configuration** page, select the **Header** tab.

Select the theme you want to assign.

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



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



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

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

Chapter 2
Managing Approvals and Notifications

A workflow is used to manage the approval and routing of events in ADP Workforce Now™. For every workflow, the event needs to be sent to at least one person for approval or notification, and it must follow a route (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.

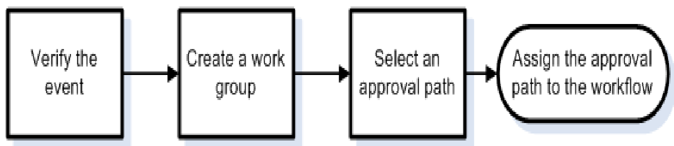
Note: Depending on how your company is set up, you may be using additional types of workflows. For more information on additional workflows, see the *HR & Benefits Implementation Guide* located on the Support Center.

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.



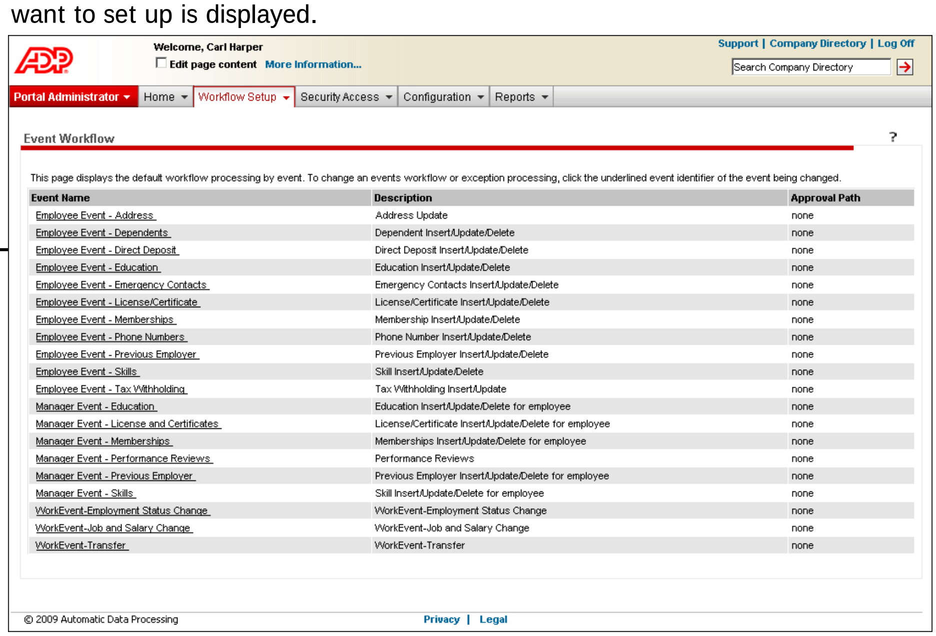
Verifying the Event

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**.



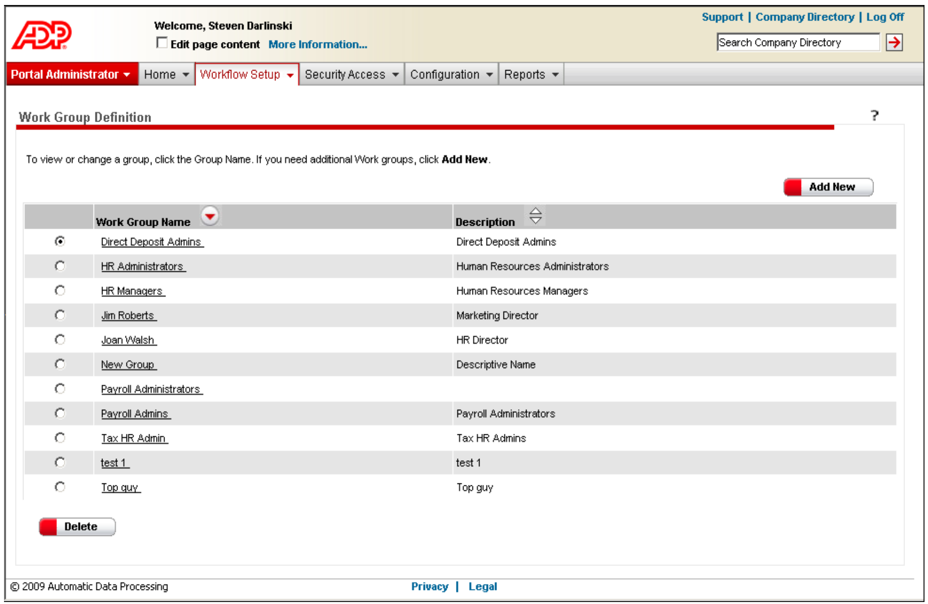
Event Name	Description	Approval Path
Employee Event - Address	Address Update	none
Employee Event - Dependents	Dependent Insert/Update/Delete	none
Employee Event - Direct Deposit	Direct Deposit Insert/Update/Delete	none
Employee Event - Education	Education Insert/Update/Delete	none
Employee Event - Emergency 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. 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.

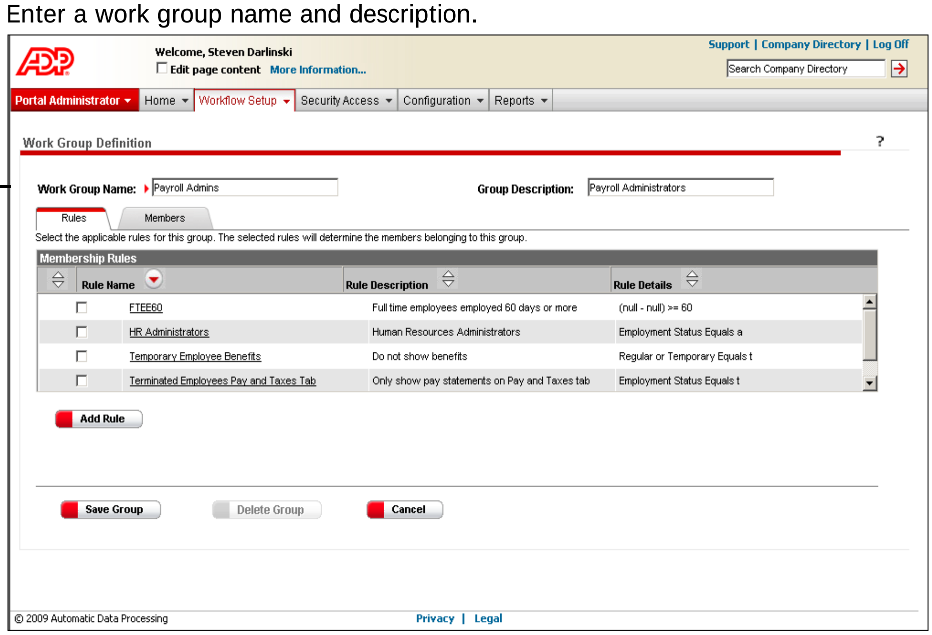
Note: Once you create a work group, you can use it in other workflows; for example, you may want the same HR team to be notified of several different manager events.

1 Point to **Workflow Setup** and select **Work Group Definition**, and then click **Add New**.



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.



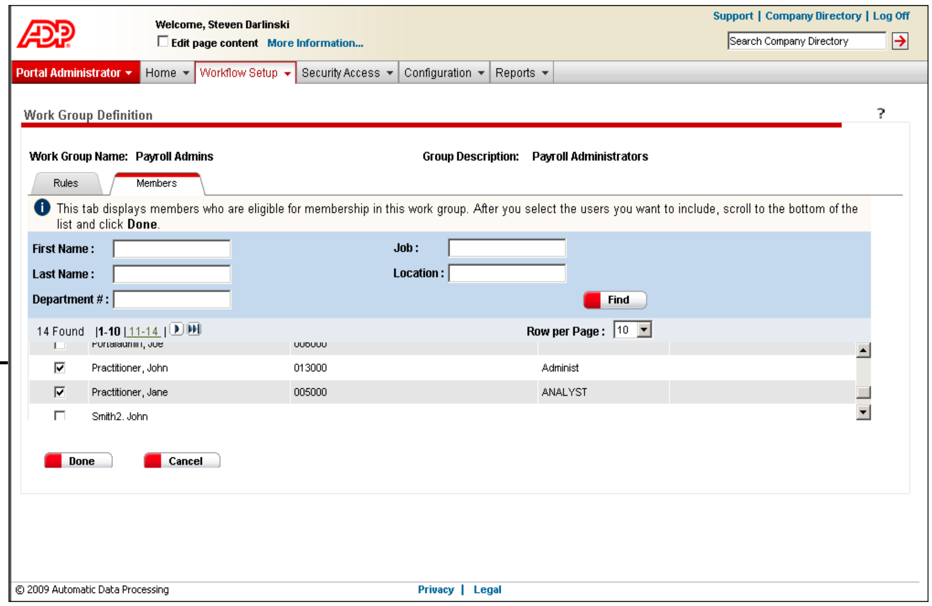
Note: On this page, you can choose to use an existing membership rule or create a membership rule to further define your work group. When you assign a membership rule to a work group, users who meet the rule's criteria are added. If you don't assign a rule, then you need to add members to your work group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



6 When you are finished, click **Done**.

7 Click **Save Group**.

Selecting an Approval Path

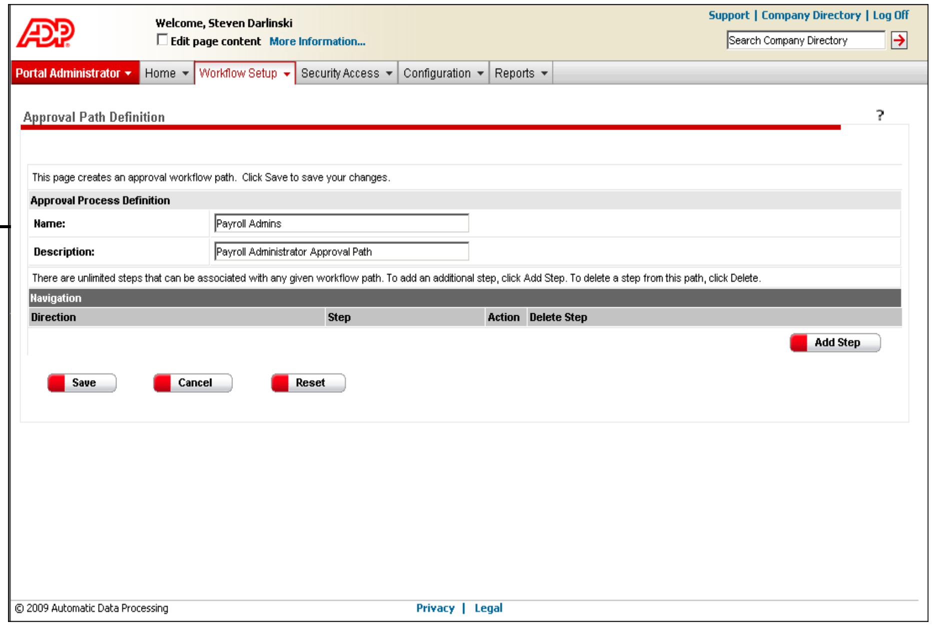
An approval path is the route that the event follows in the workflow. An approval path can have one or more steps, depending on the event. Once you create an approval path, you assign it to the workflow.

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**.

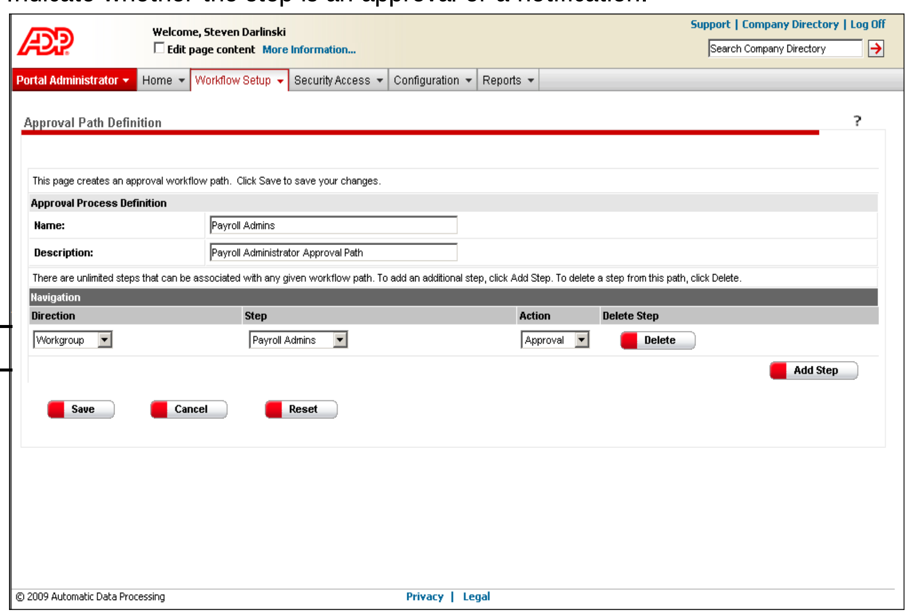
In our example, the approval path name and description define the people included in the approval path.



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

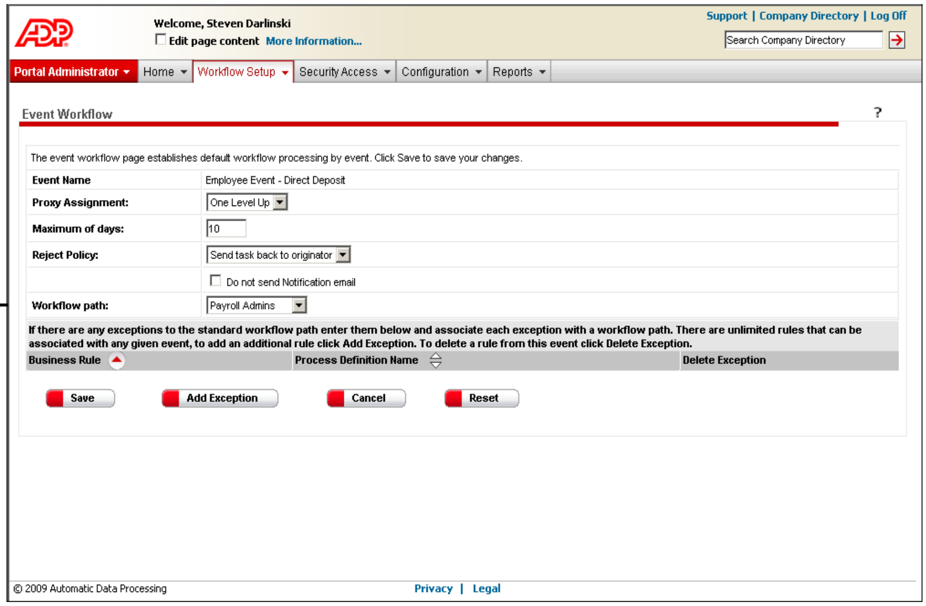
To complete the workflow, you need to assign the approval path to the workflow.

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**.



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

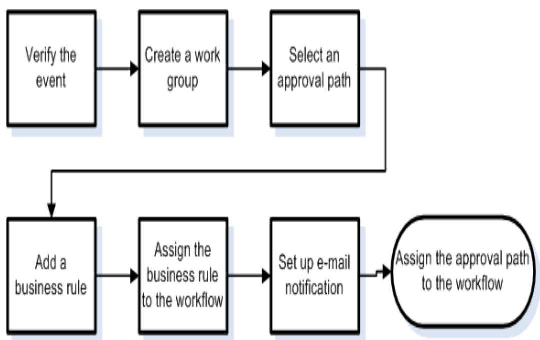
Creating a Complex Workflow

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.

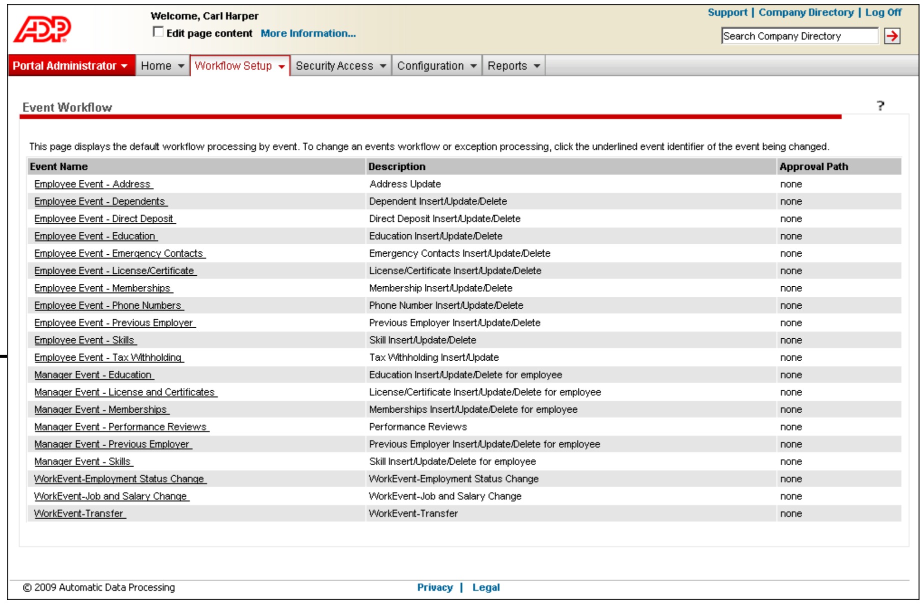


Verifying the Event

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.



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

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

Creating a Work Group

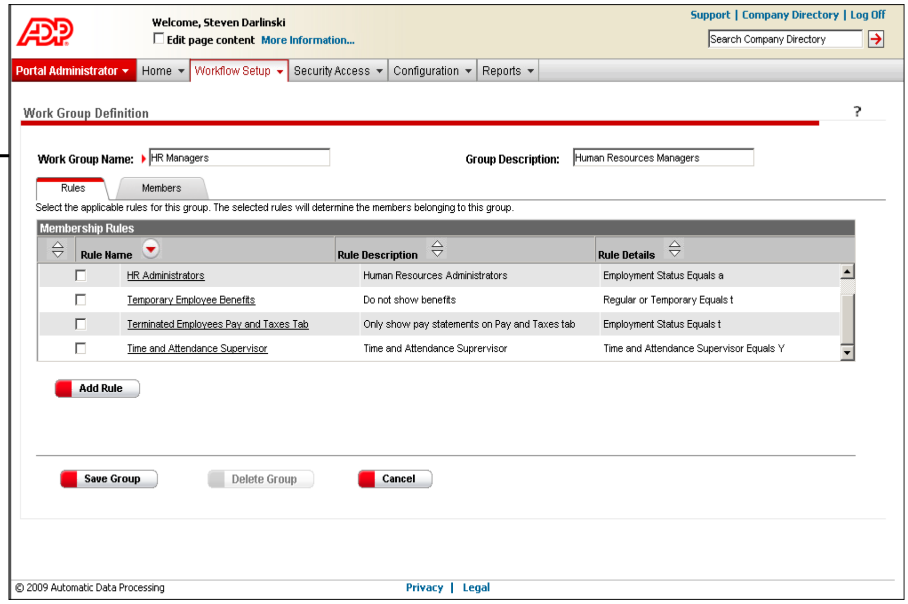
A work group consists of the people to whom an event is routed for approval or notification. In our example, two work groups are needed for the workflow: one for the payroll practitioners and one for the HR managers who are responsible for the employee's department (Department 100000). The Payroll Admins 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.

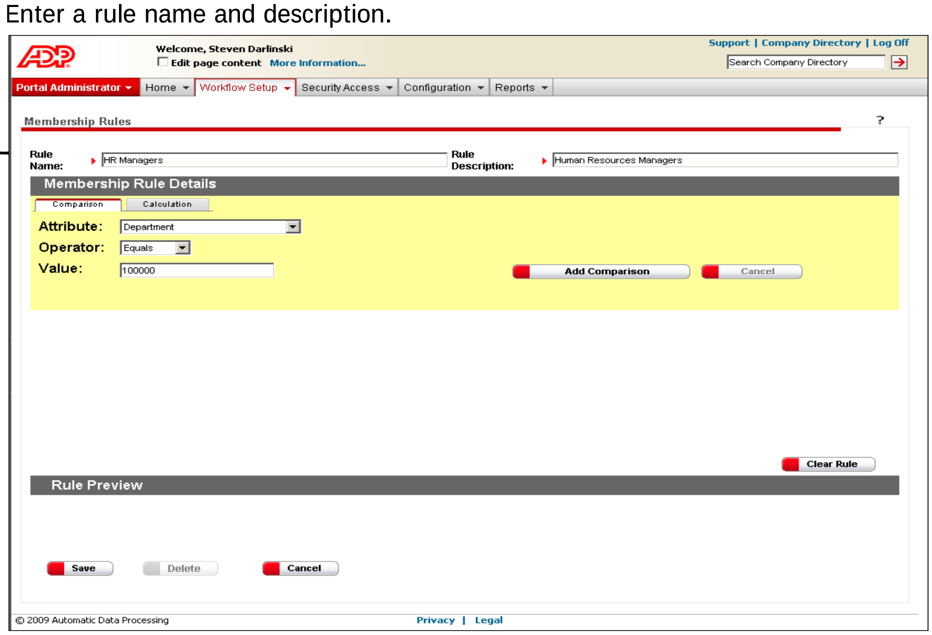


4 Determine if you want to add a membership rule to further define your work group. In our example, we need to create a two-part rule with comparison variables to indicate that members approving the event belong to Department 100000 *and also* have an HRMGR job code.

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.



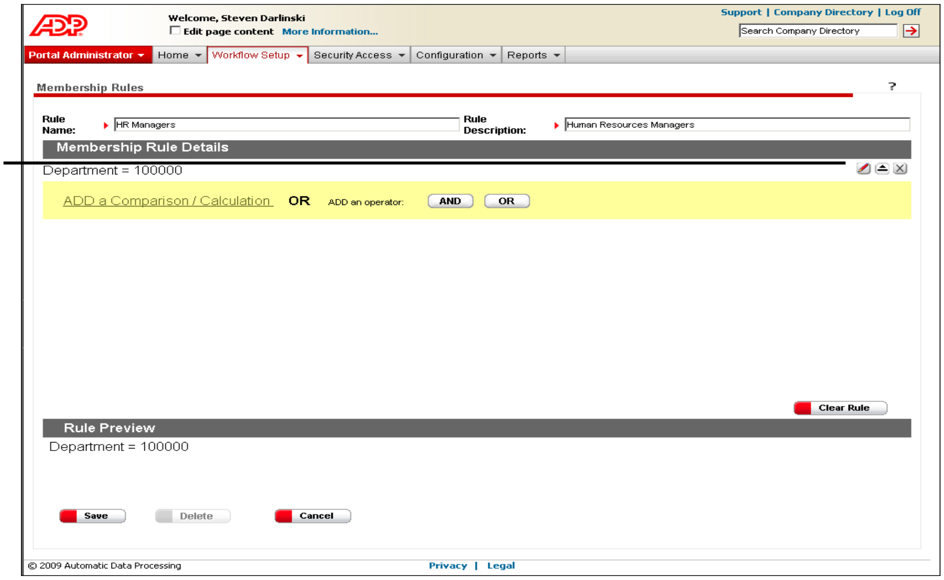
7 In the **Attribute**, **Operator**, and **Value** fields, enter the membership rule details. In our example, shown above, the details entered describe Department 100000.

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.

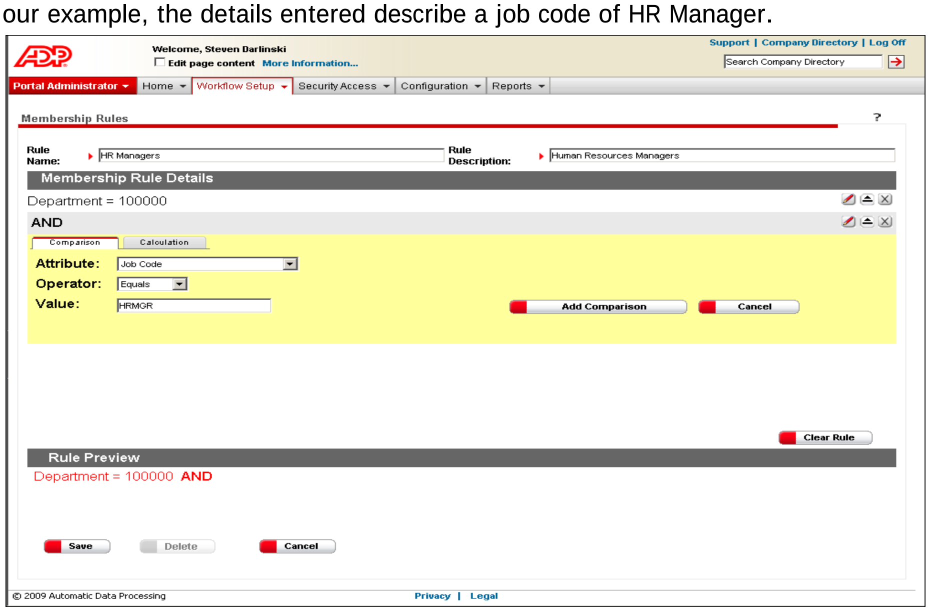
If you need to make changes, click the pencil icon to edit a rule statement, the arrow icon to add a row, and the x icon to delete a row.



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

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

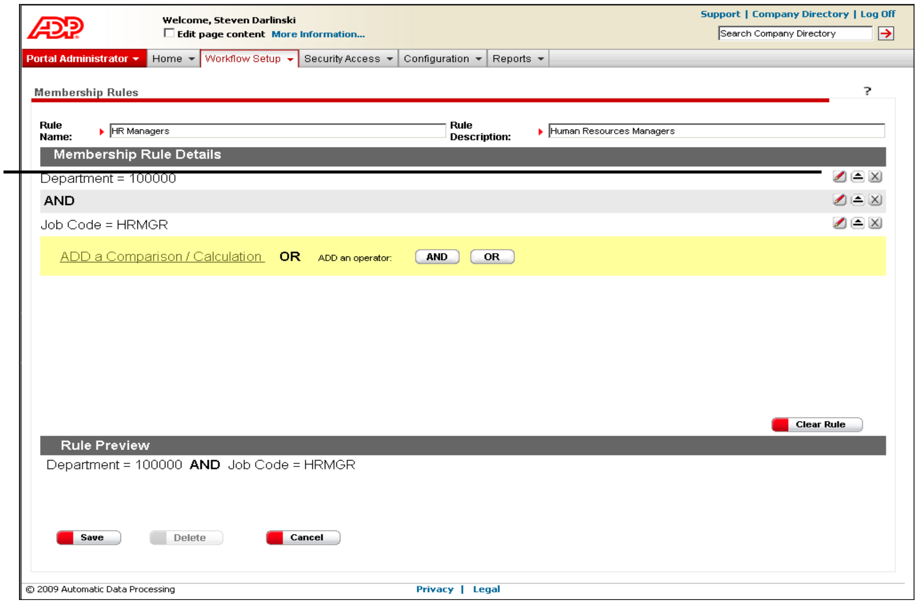
12 In the **Attribute**, **Operator**, and **Value** fields, enter the membership rule details. In our example, the details entered describe a job code of HR Manager.



13 Click **Add Comparison**.

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

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

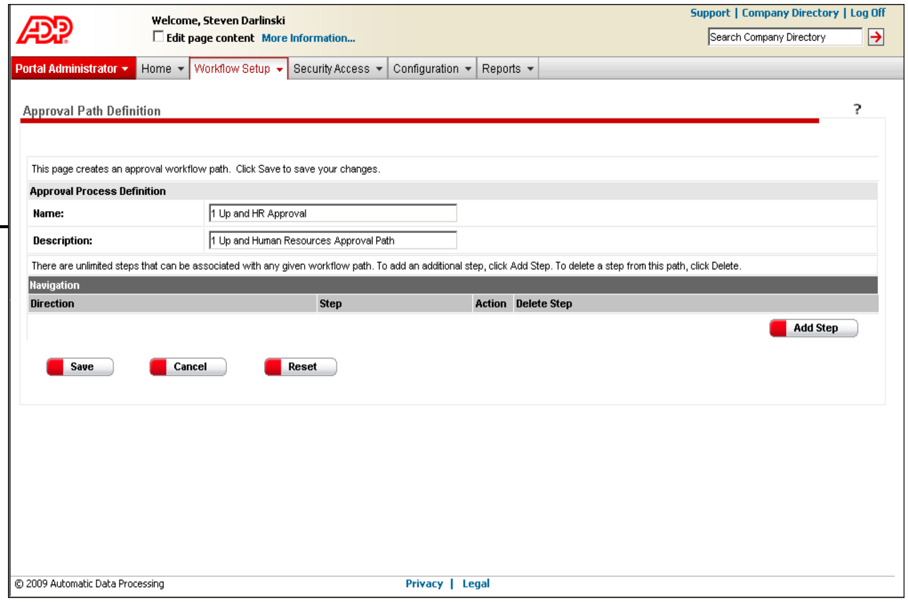
An approval path is the route that the event follows in the workflow. In our example, we need to set up a two-step approval path that first goes to the Payroll Admins work group and then to the HR Managers work group.

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.)

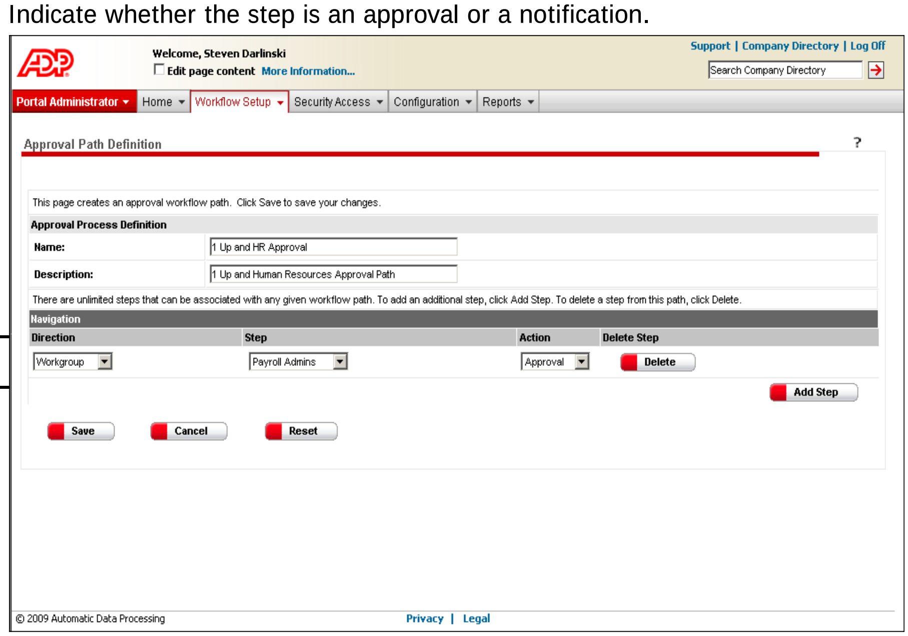


4 Add the two approval path steps in the order that the event should be routed. To add Step 1, click **Add Step**.

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.

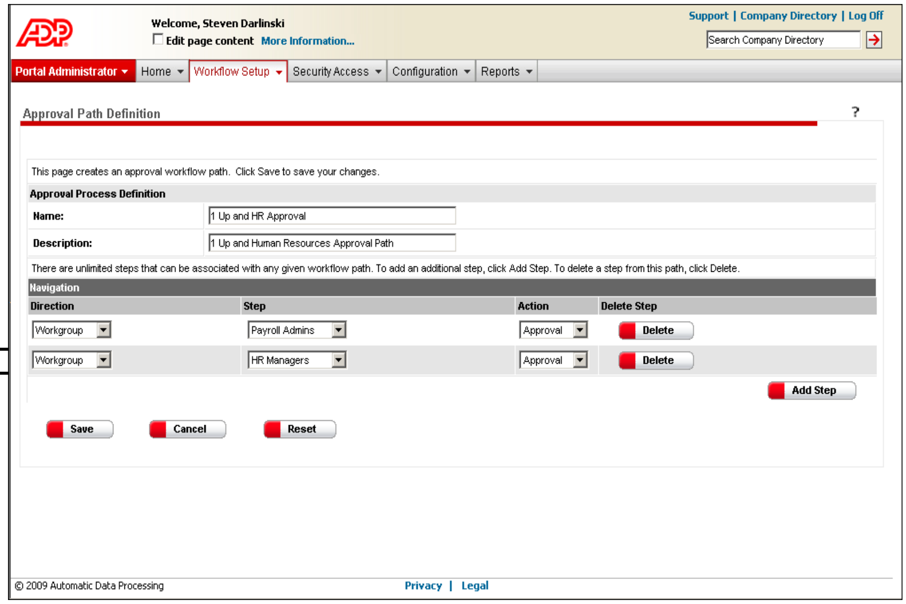


6 Add Step 2 by clicking **Add Step**.

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.



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

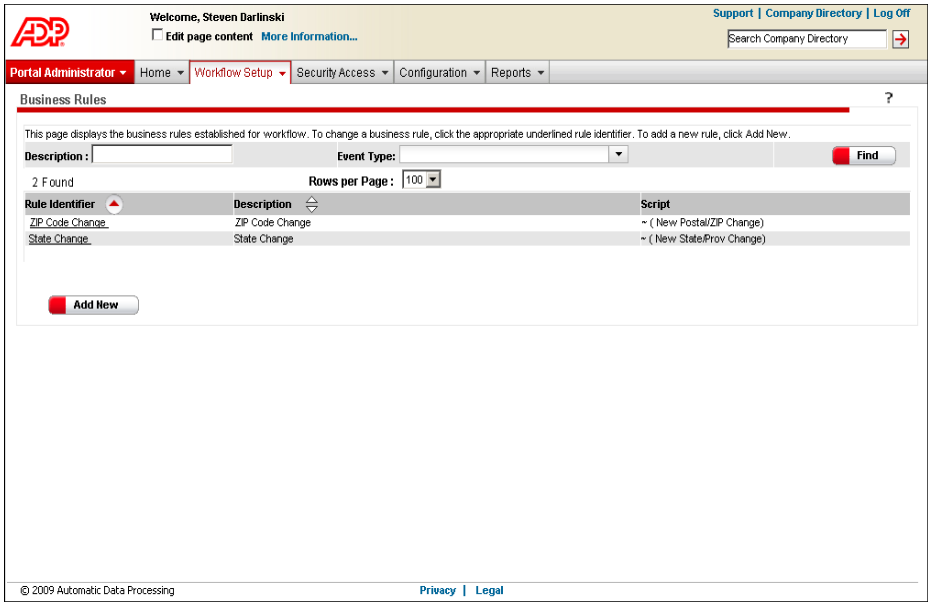
A business rule is used to create an exception for an approval workflow path. In our example, we need to create a business rule that states that federal exemptions greater than 10 require HR manager approval.

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**.

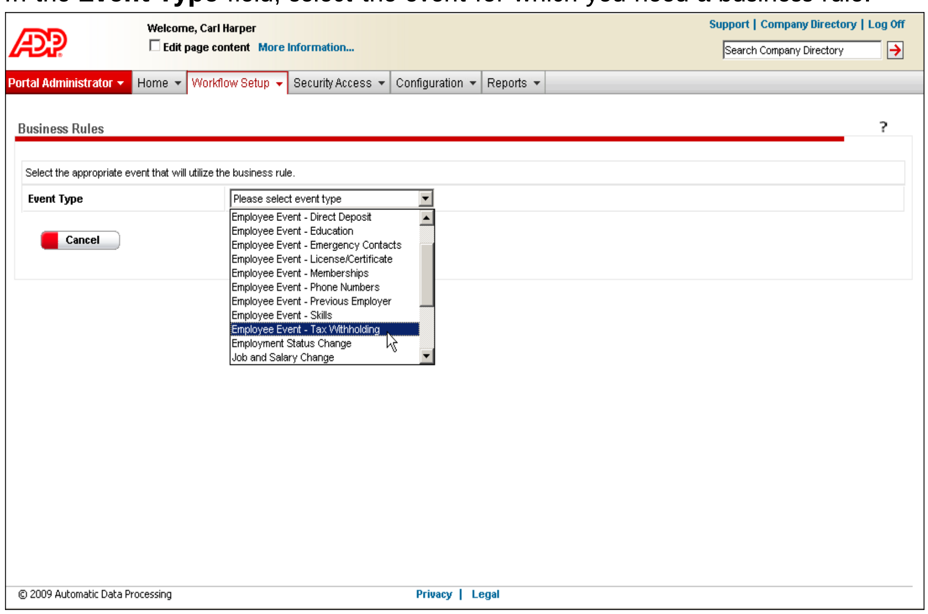
2 Click **Add New**.

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



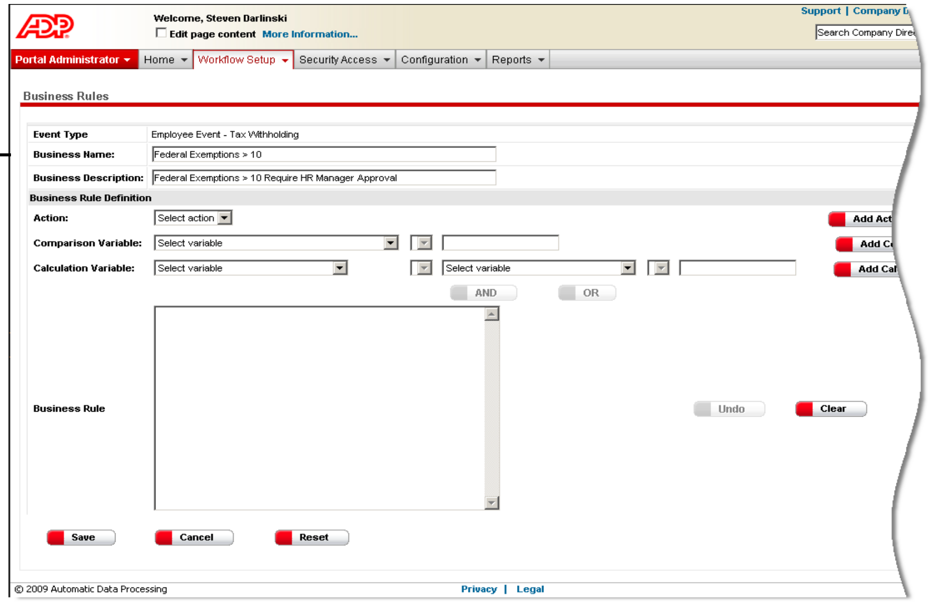
3 In the **Event Type** field, select the event for which you need a business rule.

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



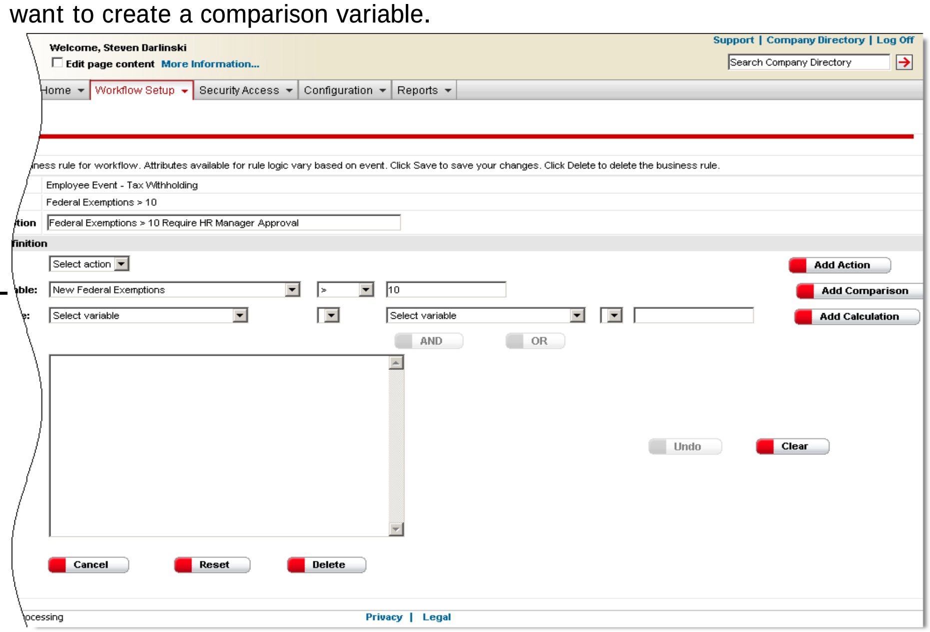
4 In the **Business Name** and **Business Description** fields, enter descriptive information.

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.

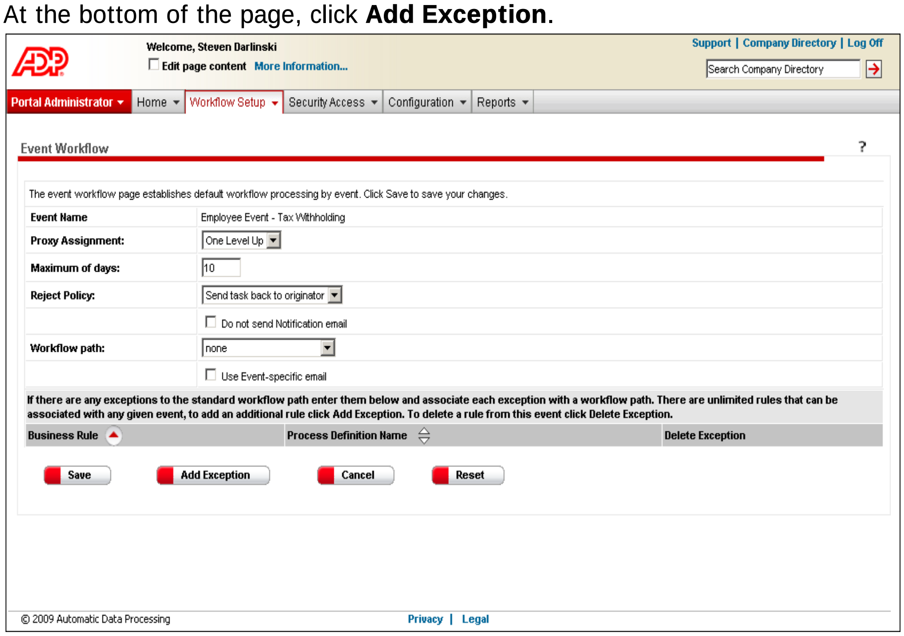
Note: This type of event is available if your company uses the HR module.

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

Assigning the Business Rule to the Workflow

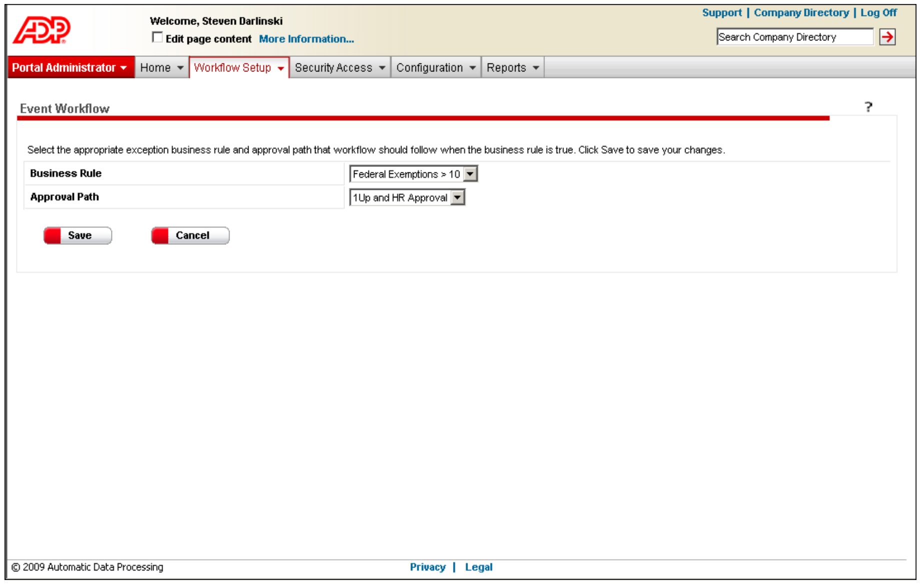
After you create the business rule, you need to assign it to the workflow.

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**.



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**.

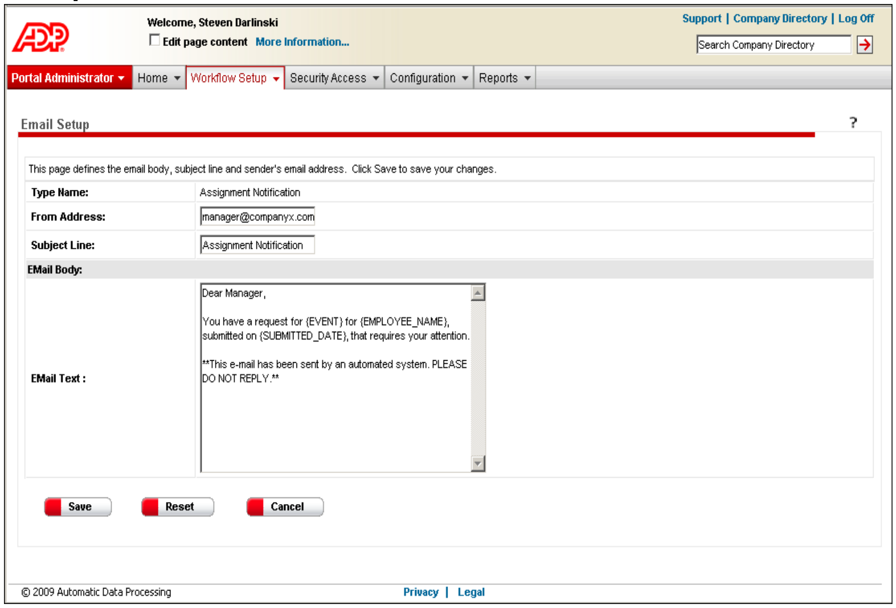
Setting Up E-Mail Notification

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.

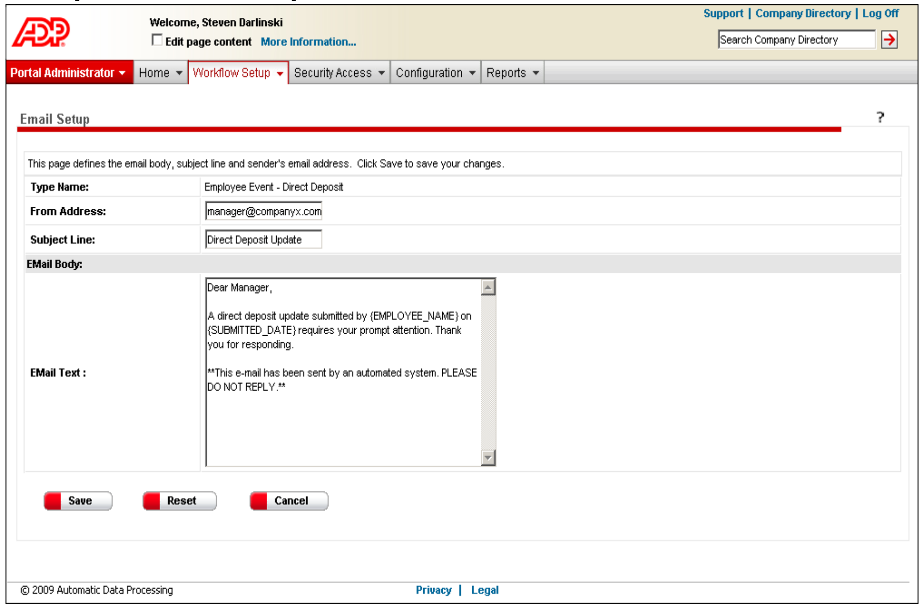
Example of a Global E-mail



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.

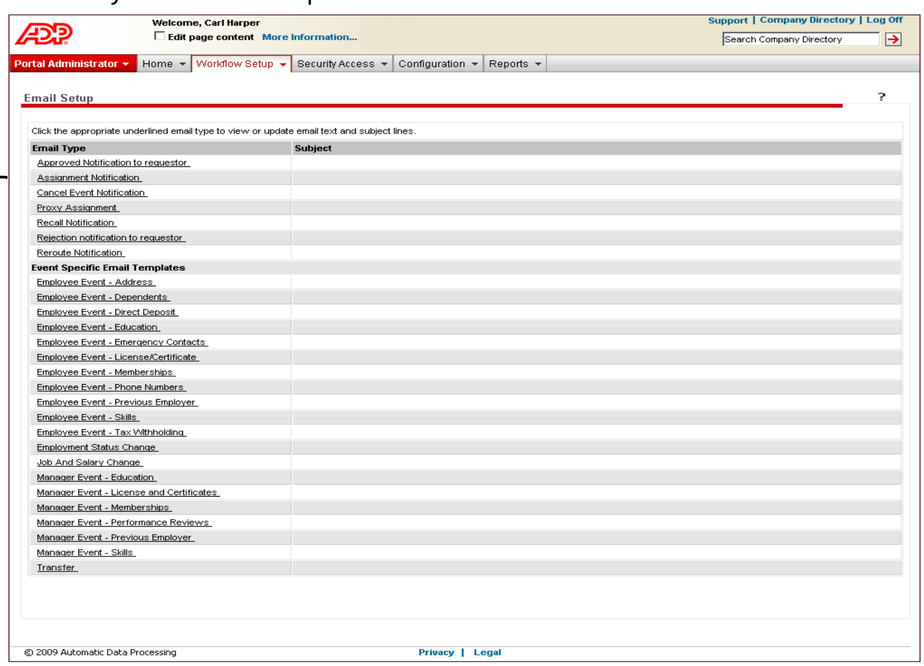
Note: When you choose to send an event-specific e-mail, that e-mail is sent to approvers in place of the global Assignment Notification e-mail.

Example of an Event-Specific E-mail



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.



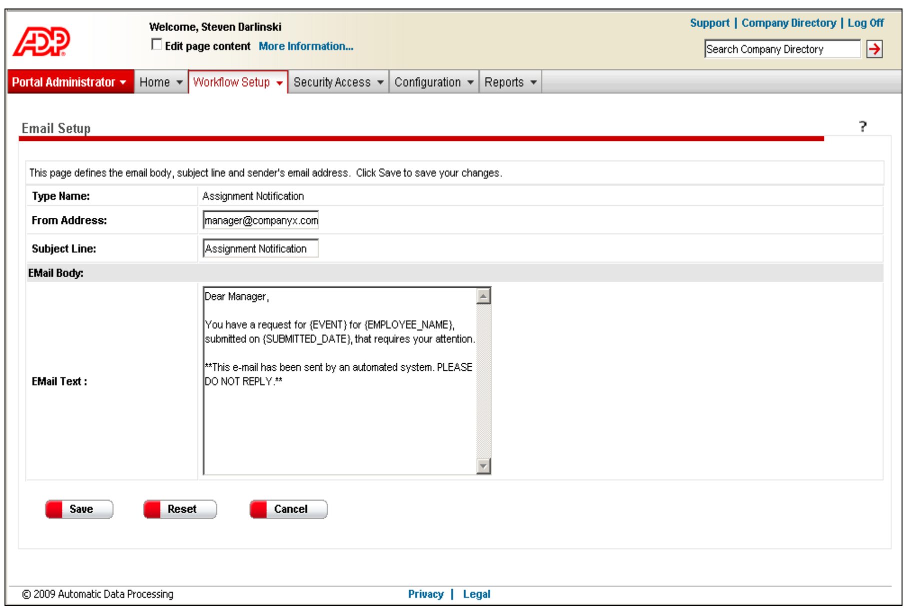
In our complex workflow example, we can set up a global Assignment Notification e-mail.

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.



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.

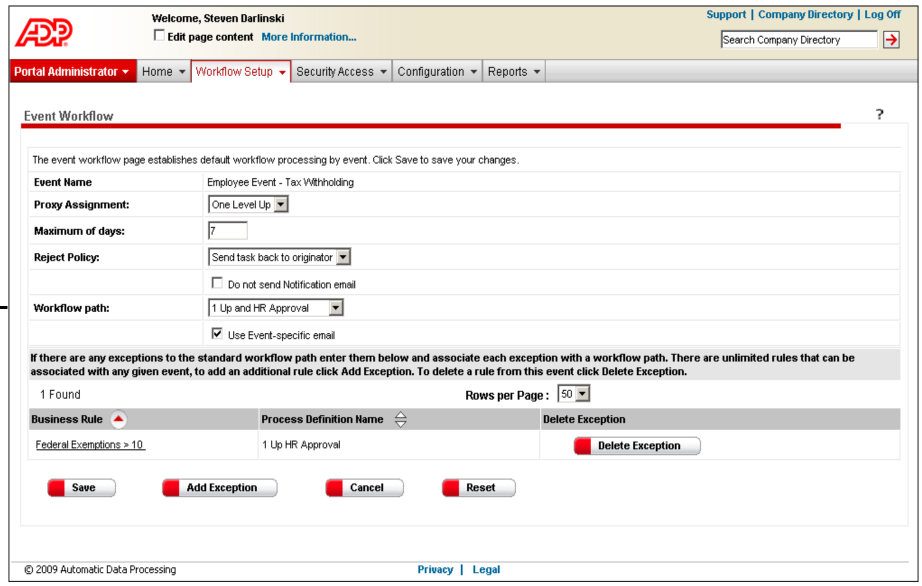
1 Point to **Workflow Setup** and select **Event Workflow**.

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**.



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.

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.

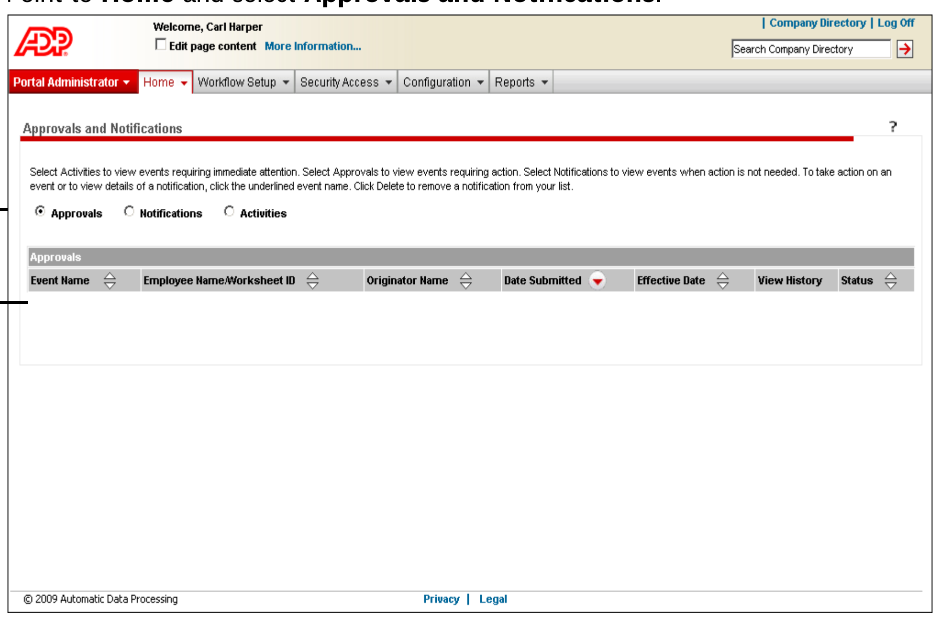
Approving or Rejecting an Event

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**.

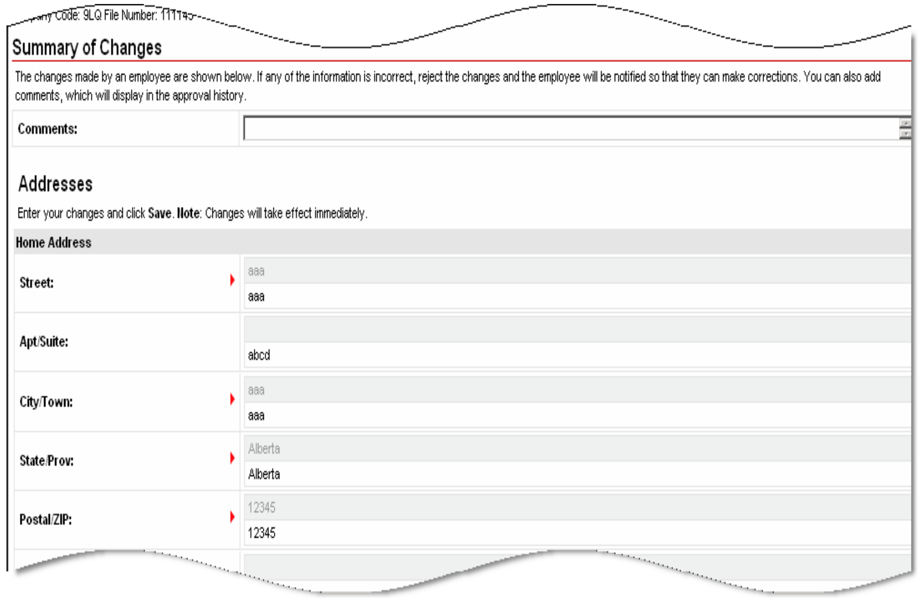
The default selection is **Approvals**.

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.



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.



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.

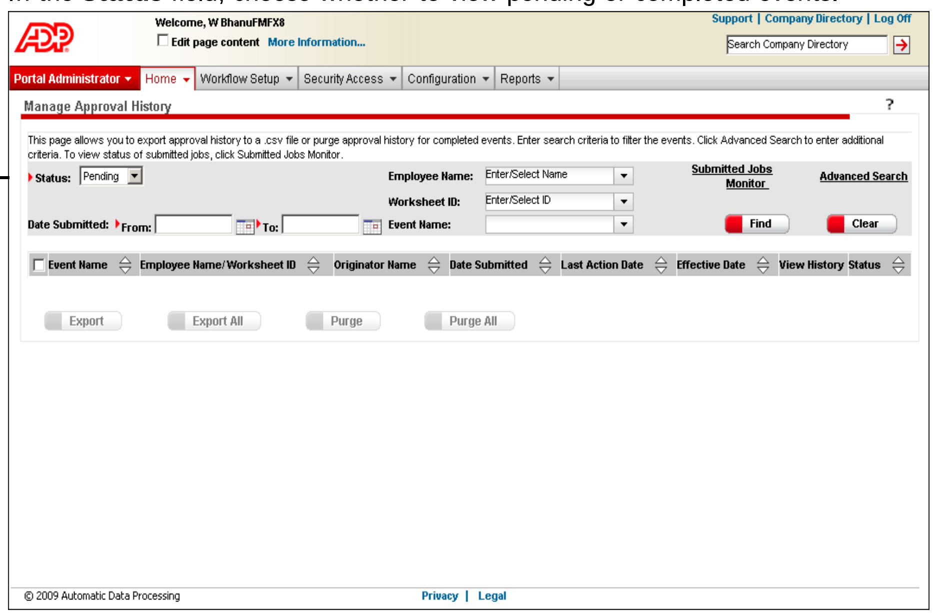
Completed events include events that have been completed, rejected, recalled, or cancelled.

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.

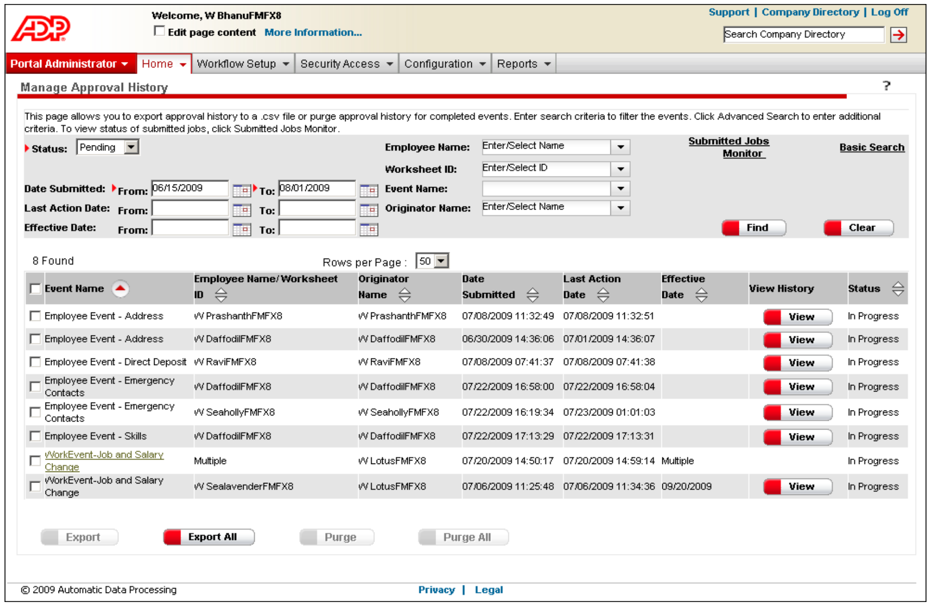
The default selection is **Pending**.



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.



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 .cvs 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.

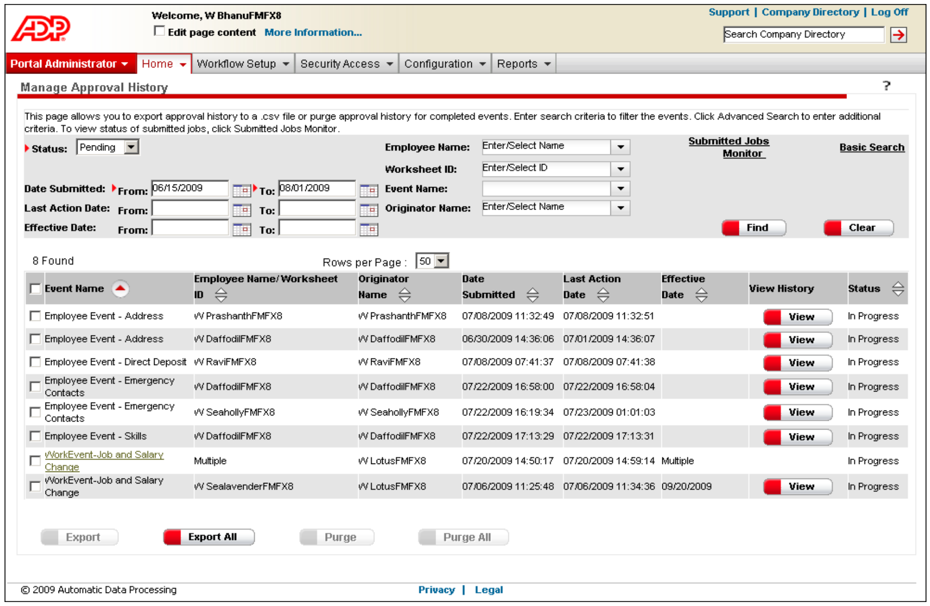
1 Point to **Home** and select **Manage Approval History**.

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.

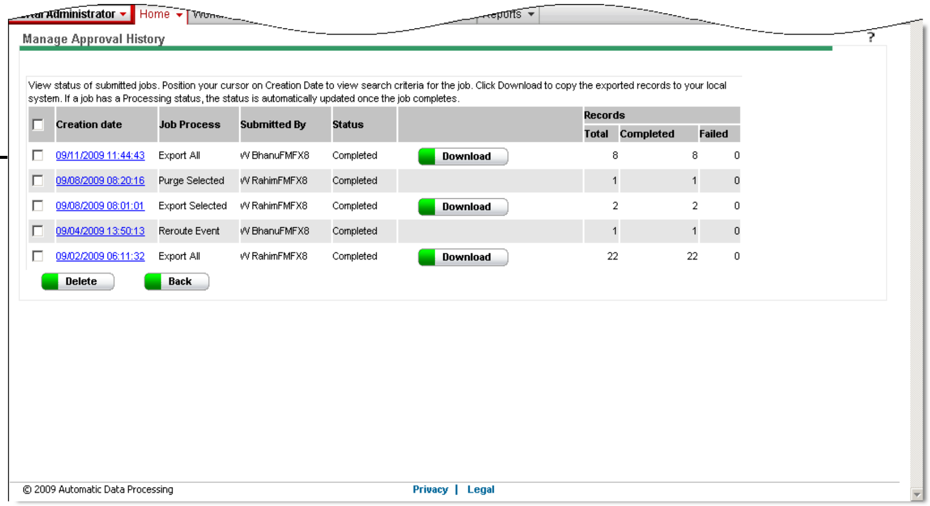


5 Do one of the following:

- 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.



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

7 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.

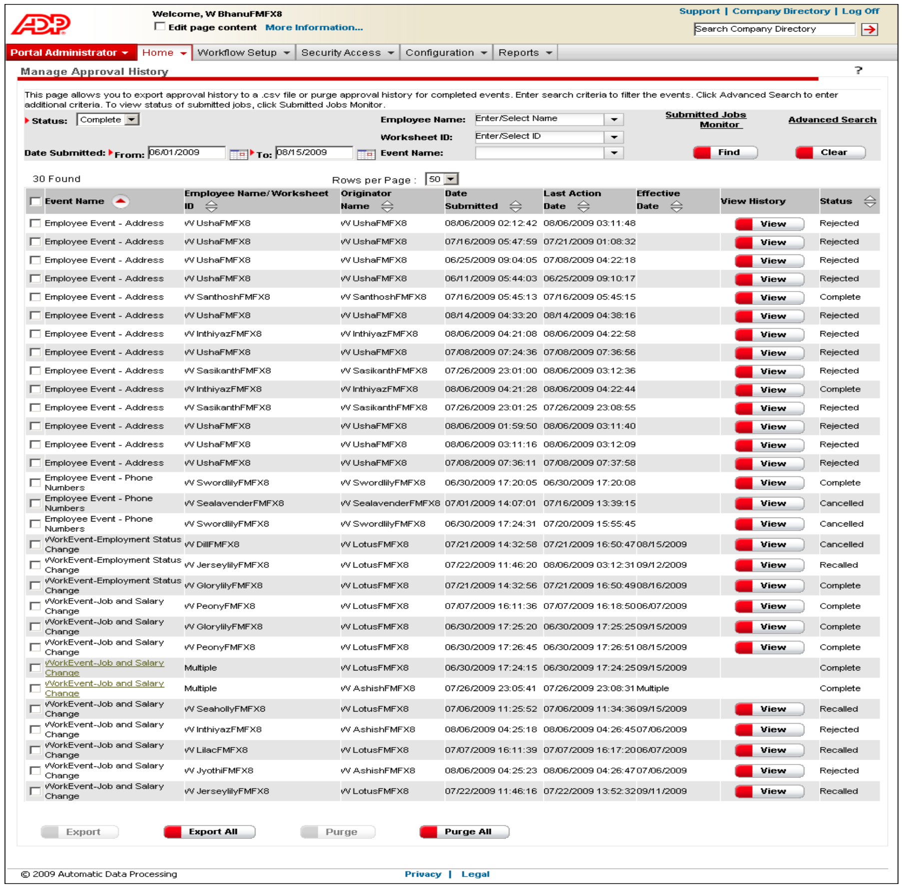
1 Point to **Home** and select **Manage Approval History**.

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

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.



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.

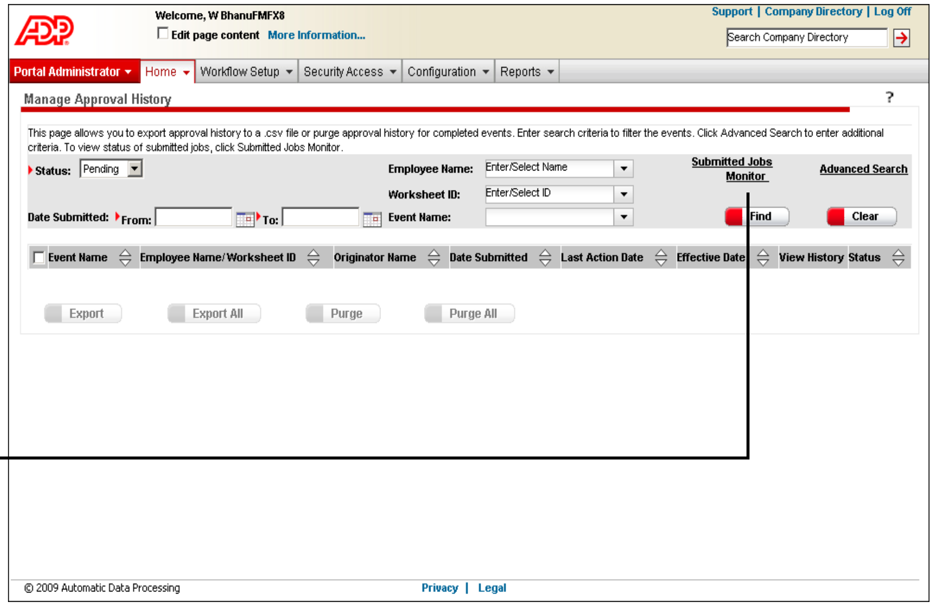
Viewing and Deleting Submitted Jobs

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.

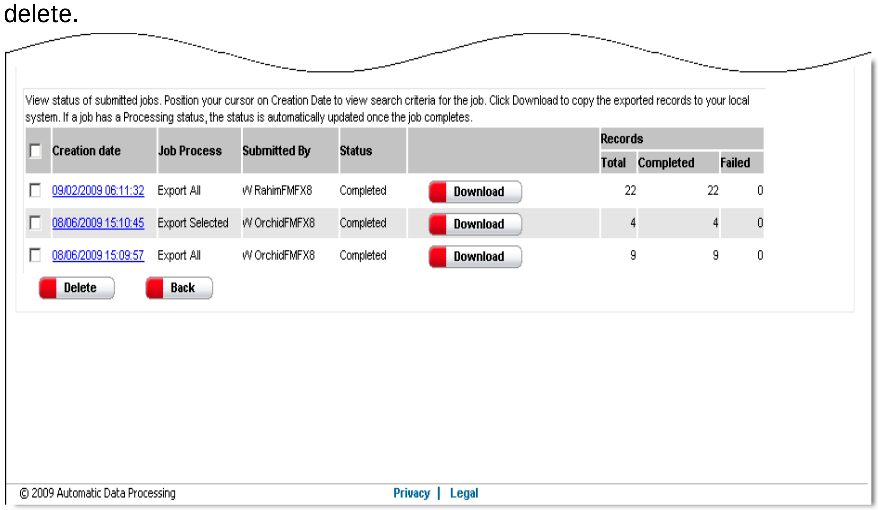
1 Point to **Home** and select **Manage Approval History**.

2 Click **Submitted Jobs Monitor**.



The **Submitted Jobs Monitor** link

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



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

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

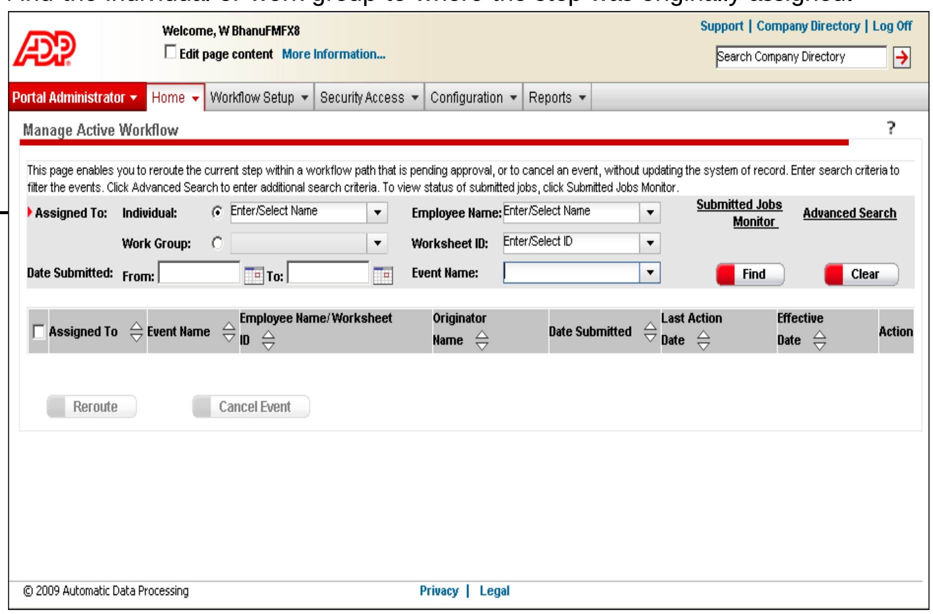
To avoid delays in a workflow path, you can reroute a pending step. You can assign the step to a new approver, or you can choose to skip the step.

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.

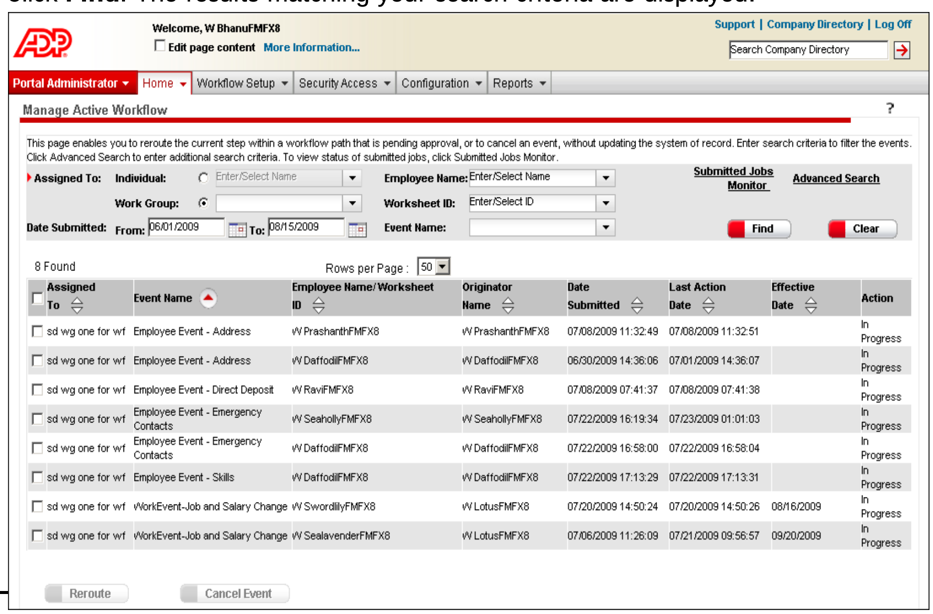
Individual is selected by default.



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.

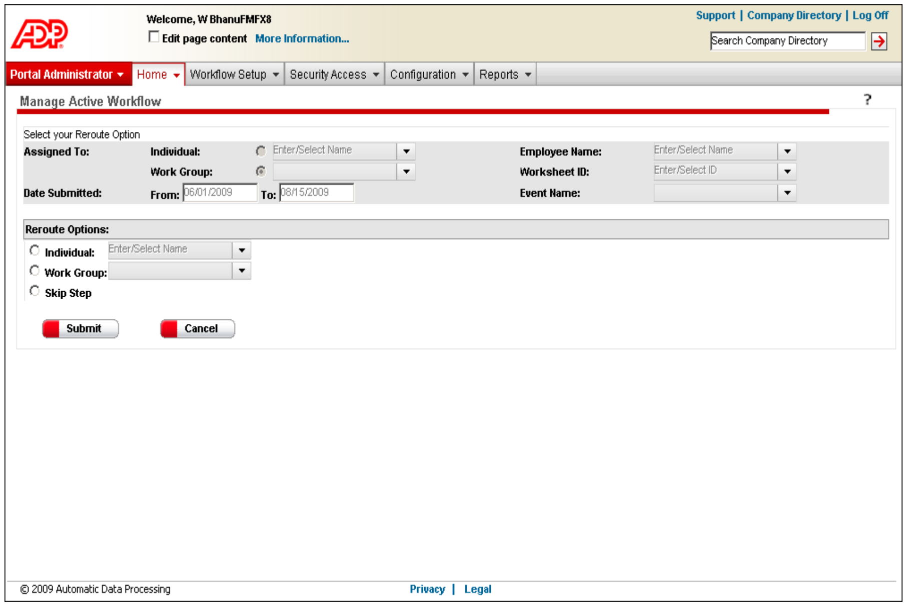
3 Click **Find**. The results matching your search criteria are displayed.



The **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.

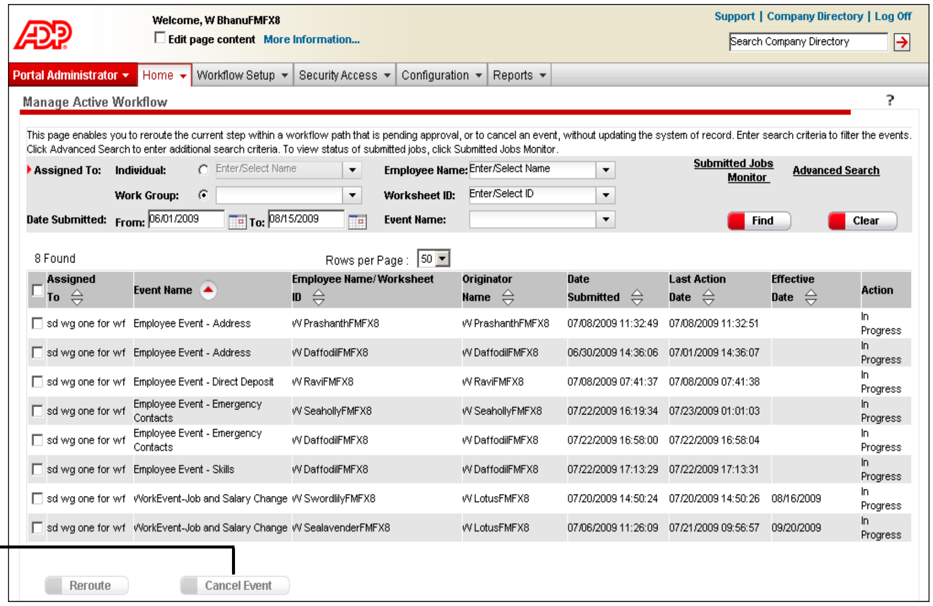
1 Point to **Home** and select **Manage Active Workflow**.

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).

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.

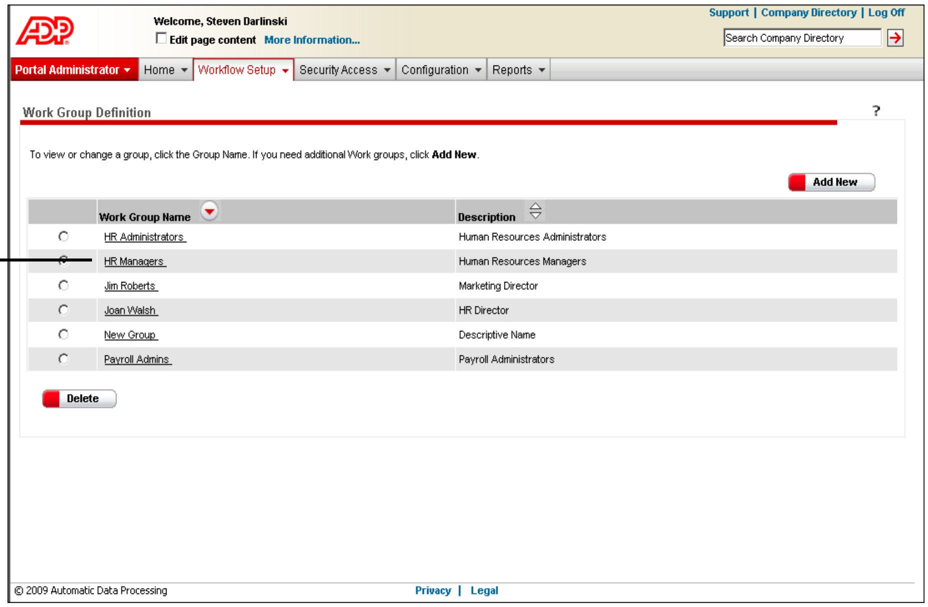
Changing or Deleting a Work Group

Changing a Work Group

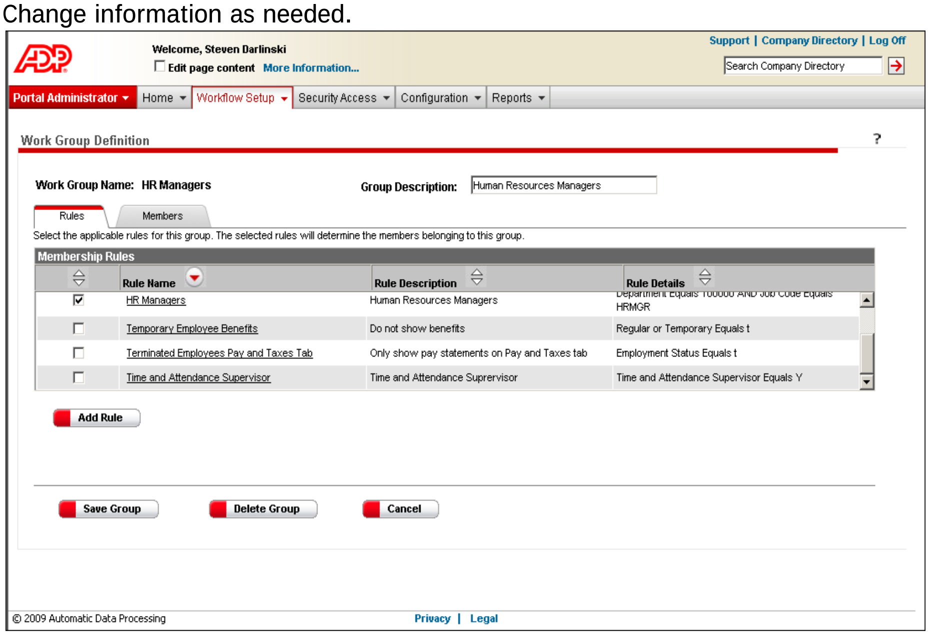
When you change a work group, any workflows associated with that work group are automatically updated with the change.

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

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



2 Change information as needed.

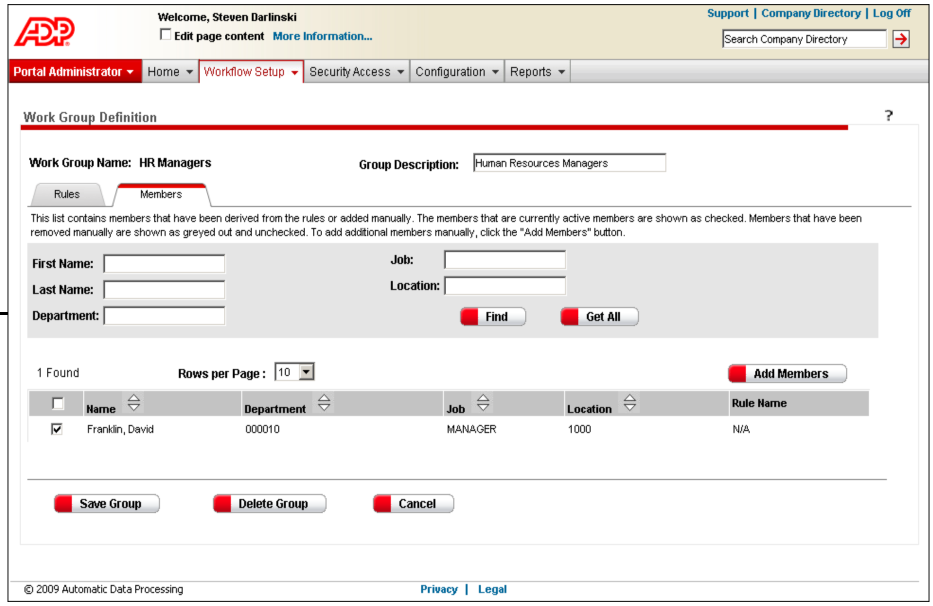


3 Click a check box to select or clear an existing rule, or click **Add Rule** to create a new rule.

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**.



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.

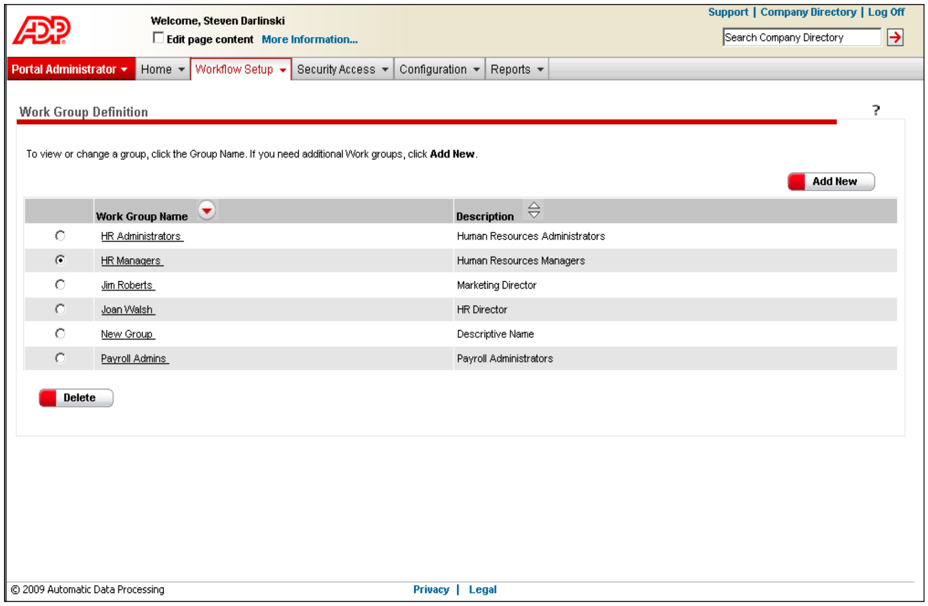
5 When you are done, click **Save Group**.

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.



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

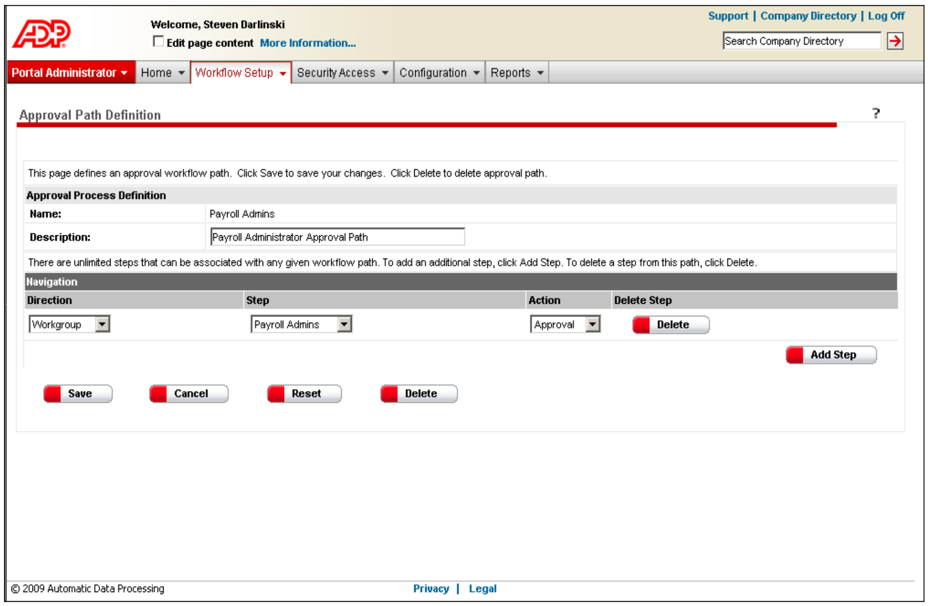
Changing or Deleting an Approval Path

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.



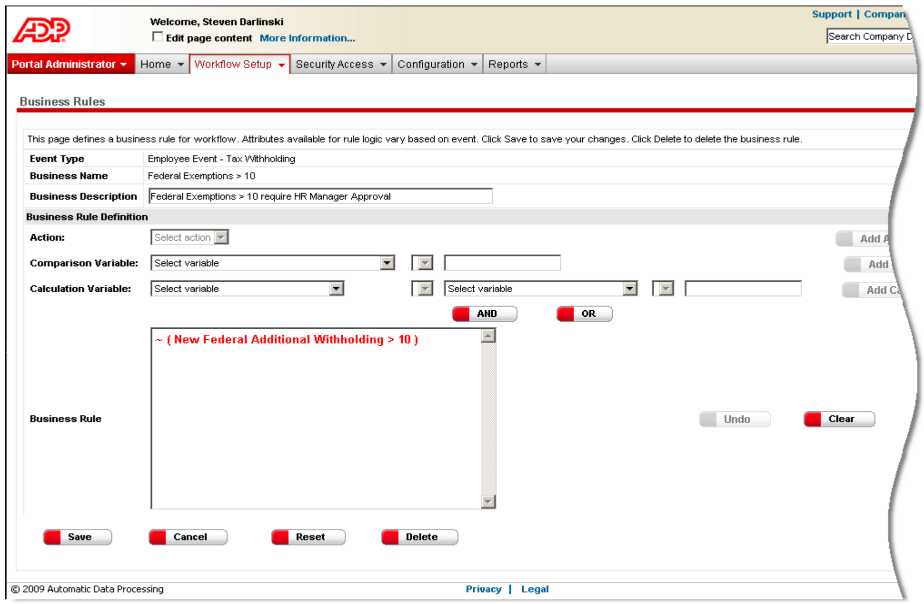
4 Do either of the following:

- 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.



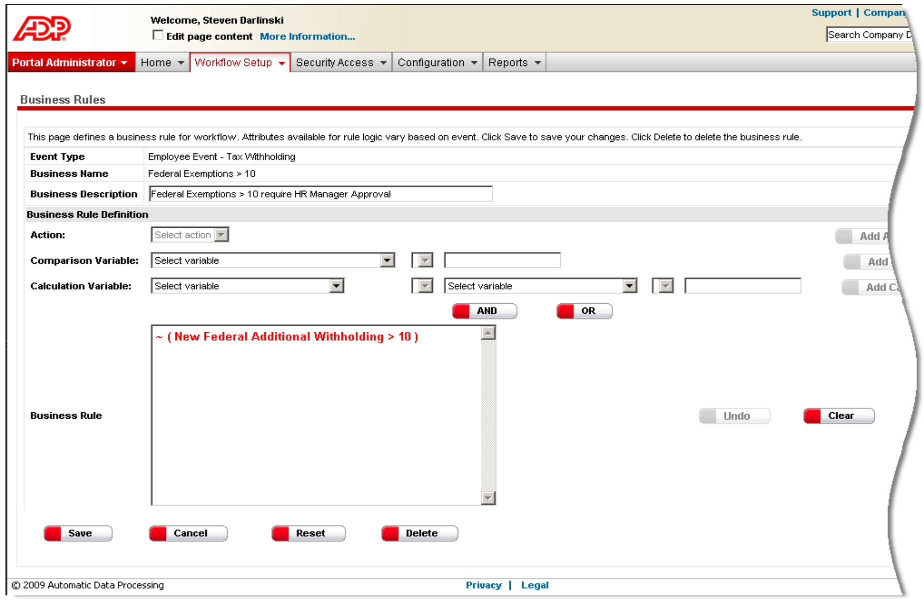
4. When you are done, click **Save**.
5. Test the business rule by adding it to an approval path and conducting the associated event.

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.



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

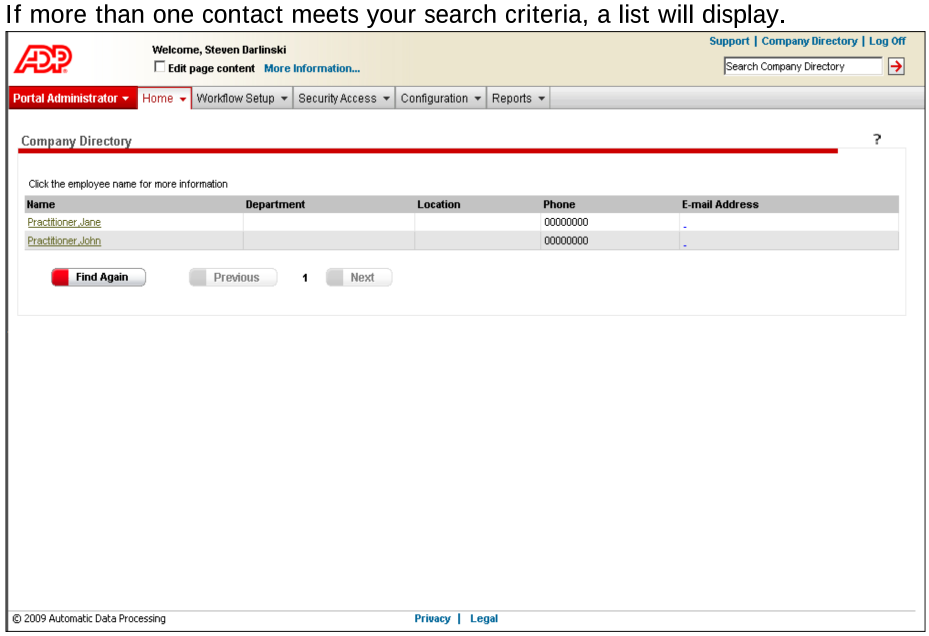
To quickly locate a contact, use the quick search field.

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

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

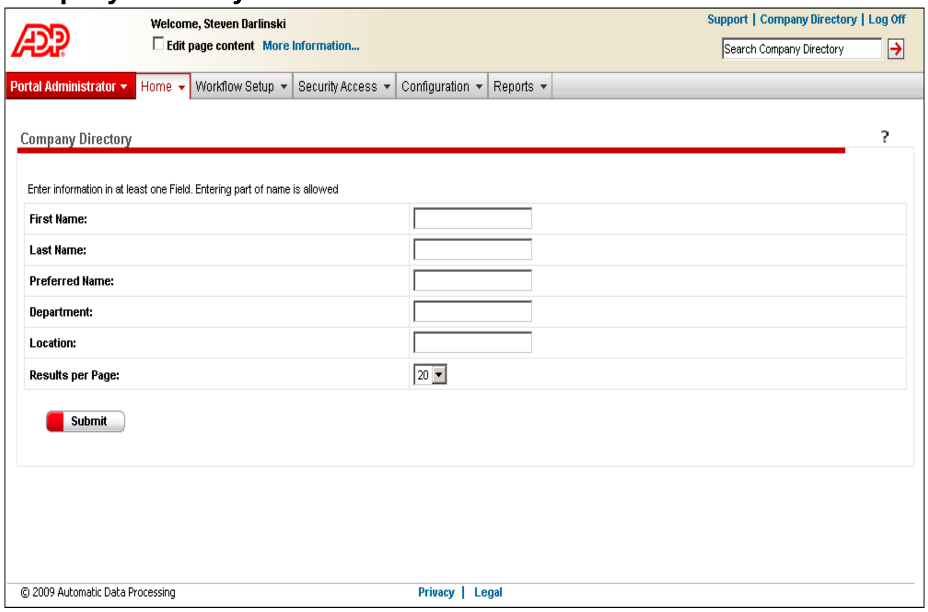
Click the contact name you want.



Advanced Search

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

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



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

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

4 Click **Submit**.

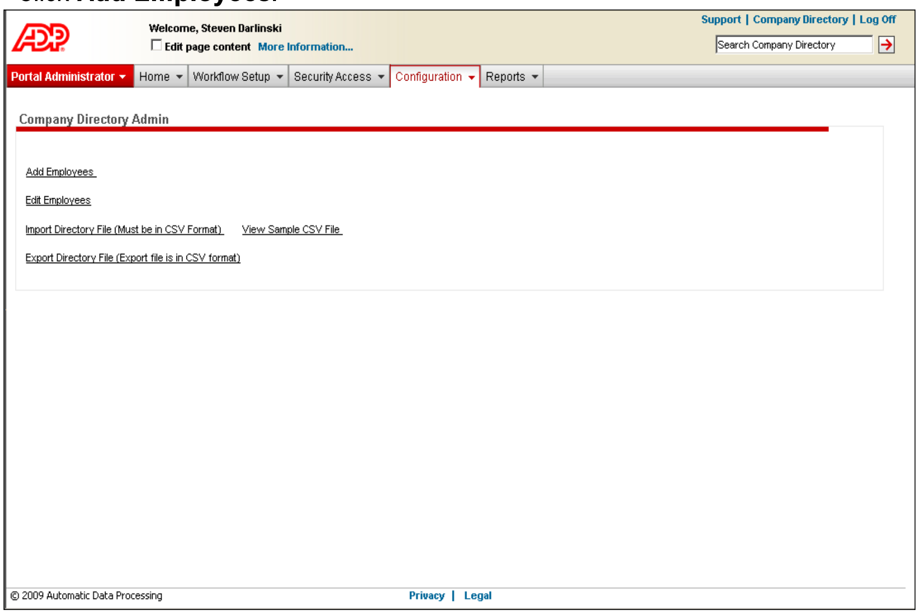
Working with Individual Contacts

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

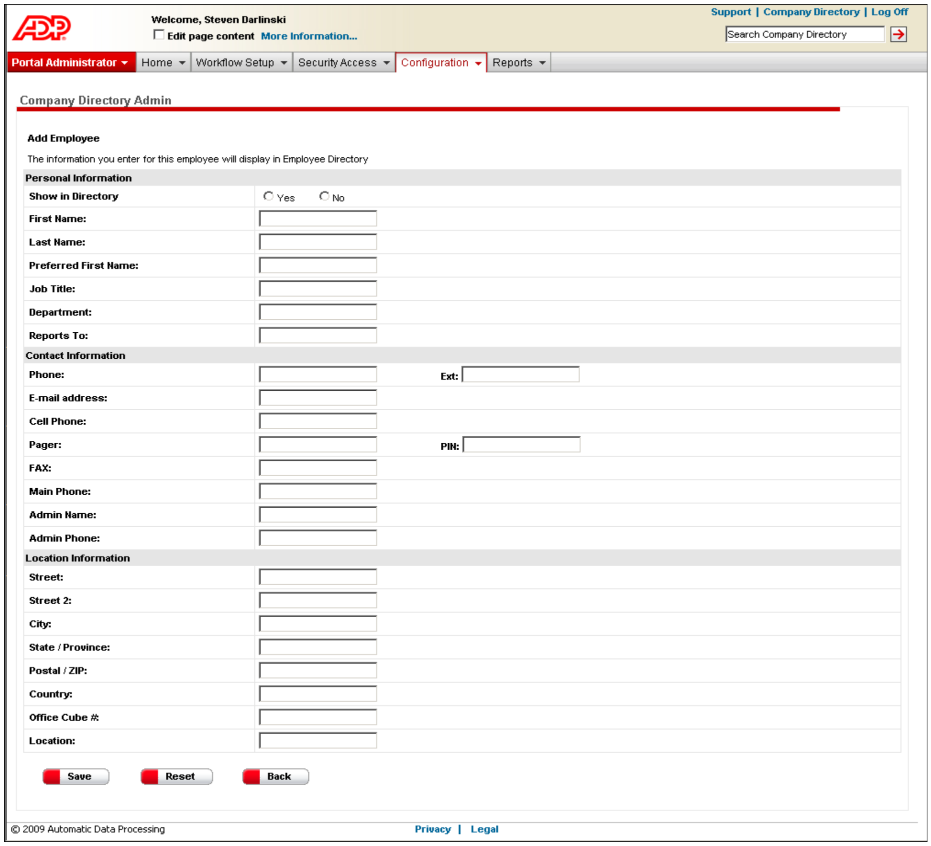
- **Individually** - You can add or remove individual contacts to your directory as needed.
- **Import a file** - You can upload a .csv file containing several contacts. (See "Importing a Directory File" on page 70.)

Adding a Contact to Your Directory

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



3 Enter the appropriate information.



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.

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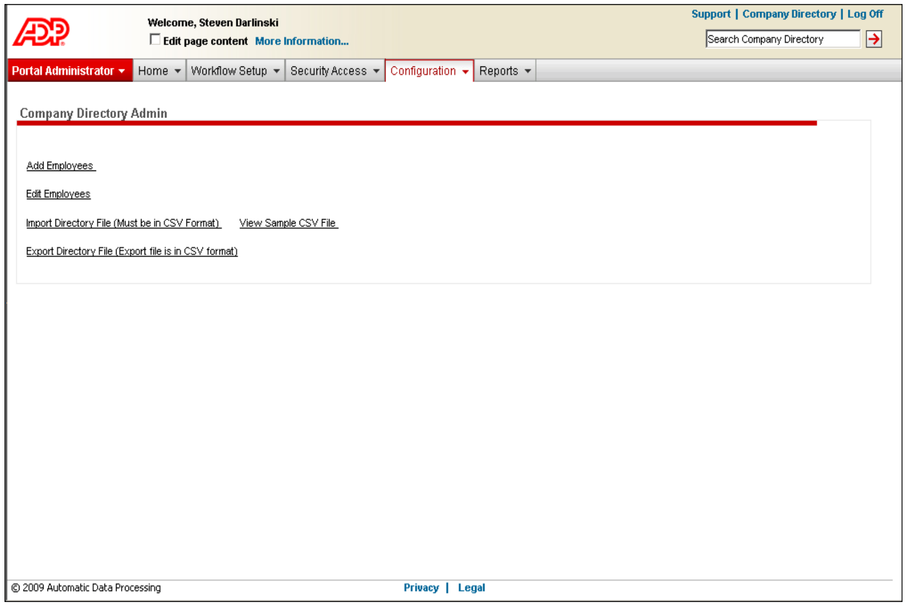
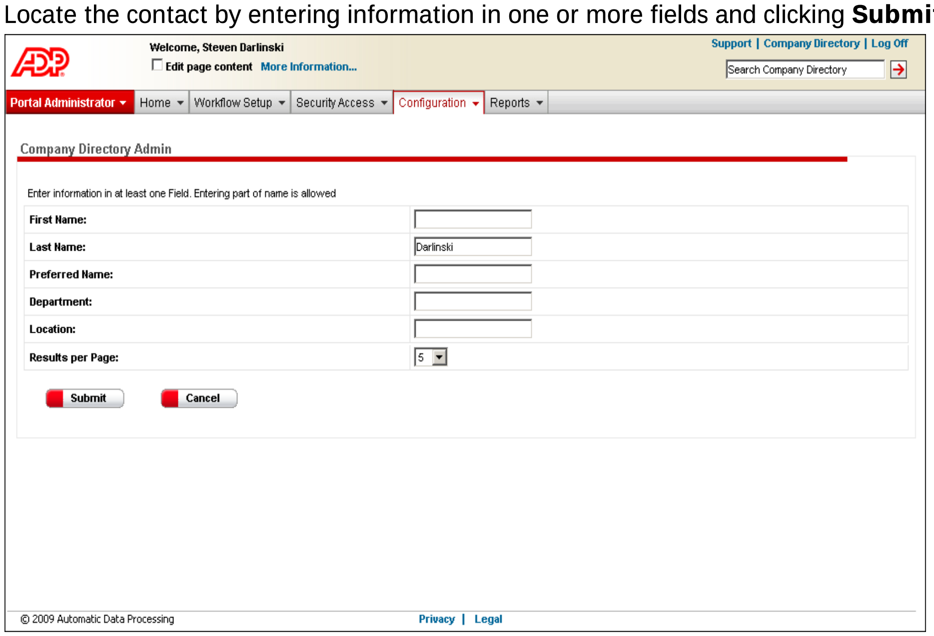
1 Point to **Configuration** and select **Company Directory**.

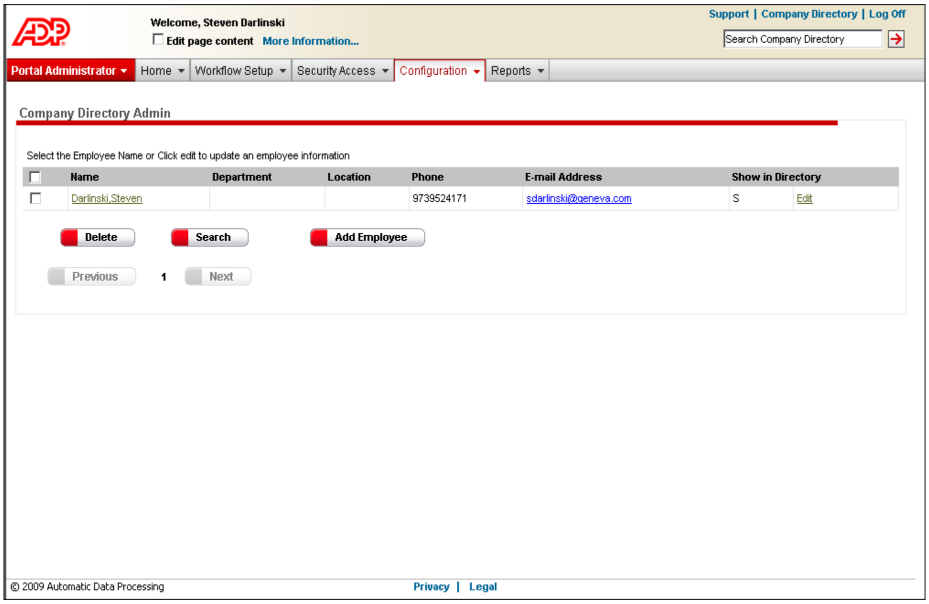
2 Click **Edit Employees**.



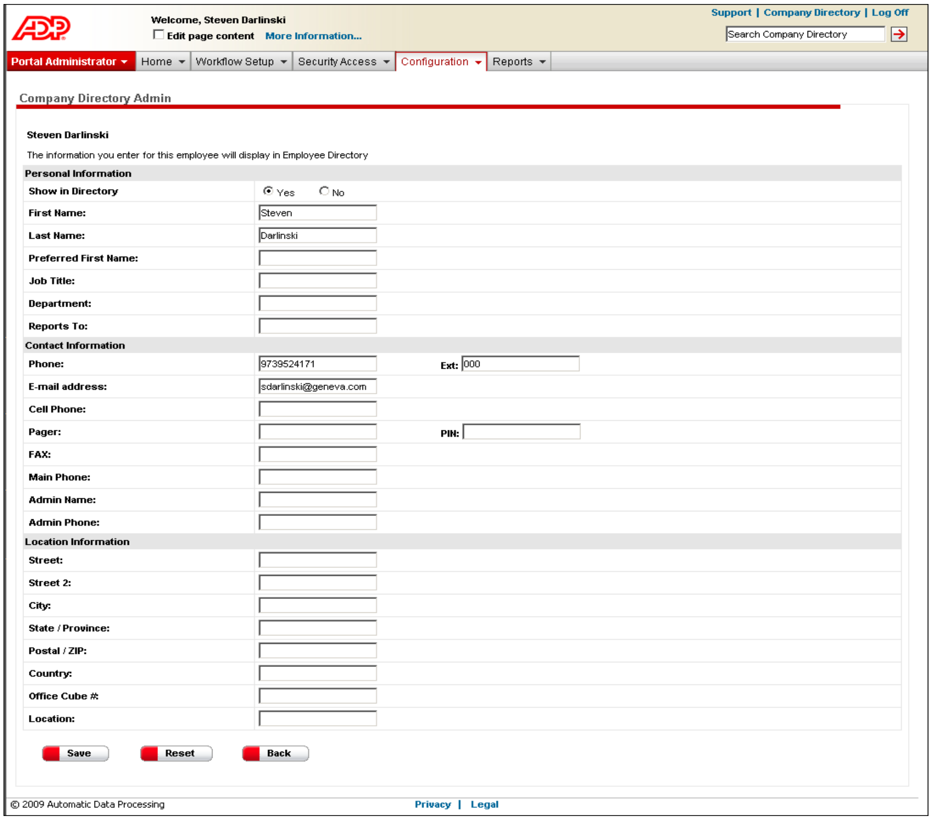
3 Locate the contact by entering information in one or more fields and clicking **Submit**.



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



5 Make your changes.



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

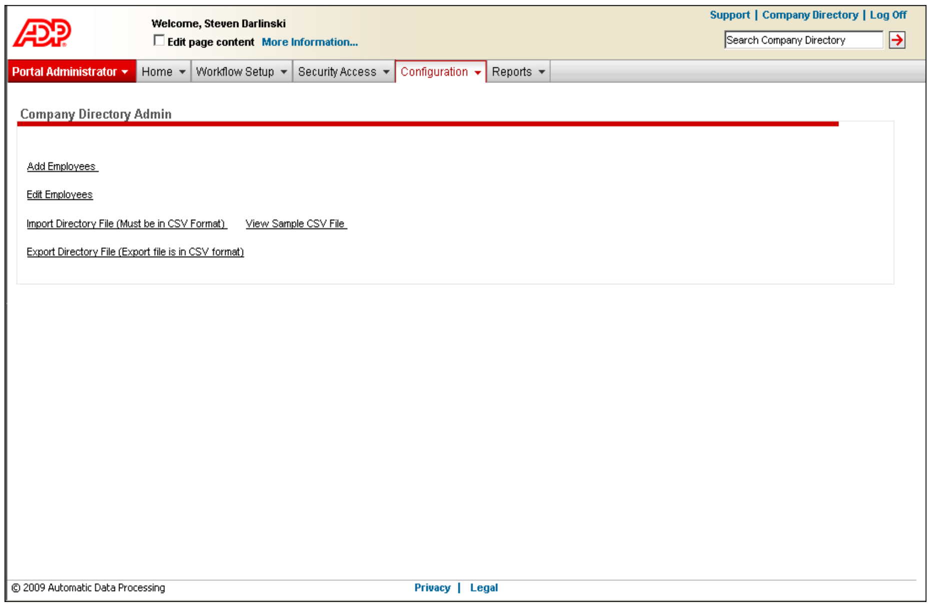
Note: Changes that you make in your company directory will not display in either your HR & Benefits module or your Payroll module.

Deleting a Contact from Your Directory

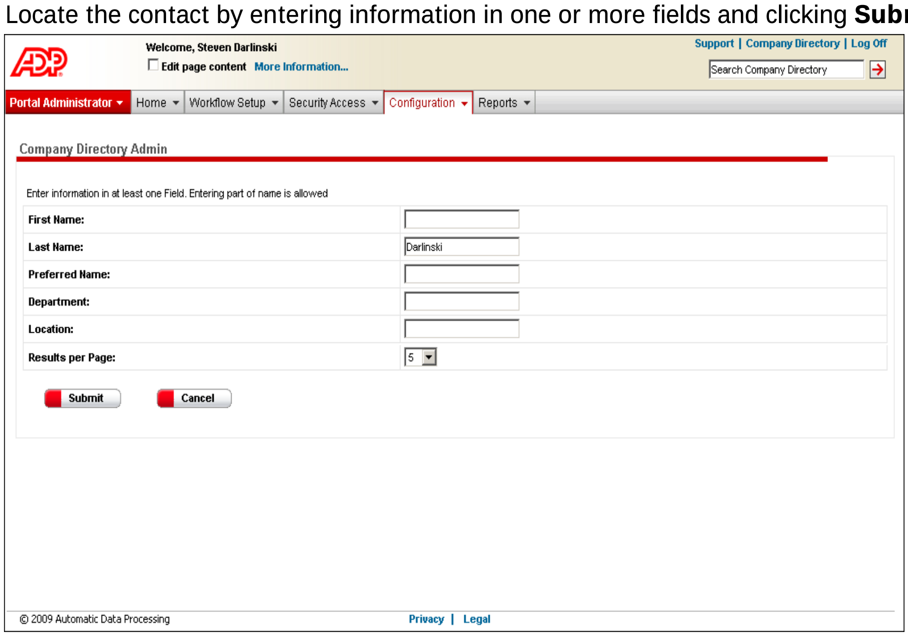
You can delete contacts who were added individually or in a .csv file. For example, you can delete a contract employee who no longer works for the company. When you delete a contact, you are only deleting it from the company directory and not your module.

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

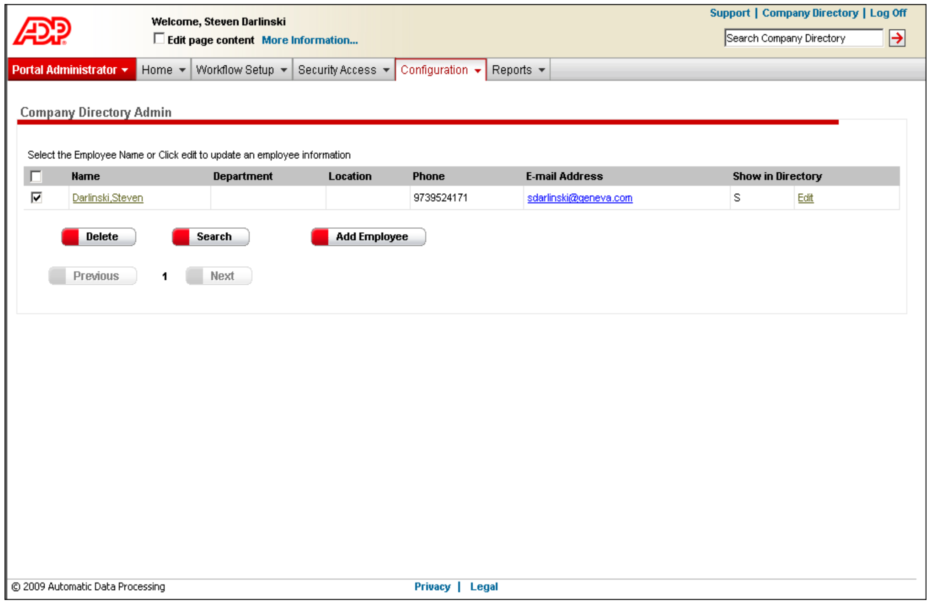
2 Click **Edit Employees**.



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



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



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

Working with .CSV Files

Importing a Directory File

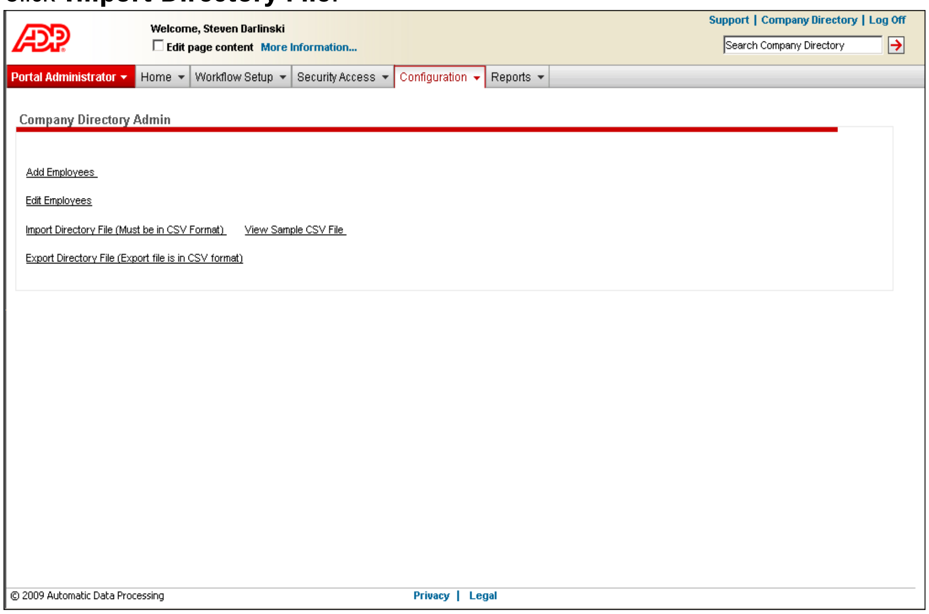
Instead of adding contacts individually, you can import a large number of contacts to your company directory using a .csv file. Later, you can import another .csv file to either add to files in your directory or replace them.

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**.

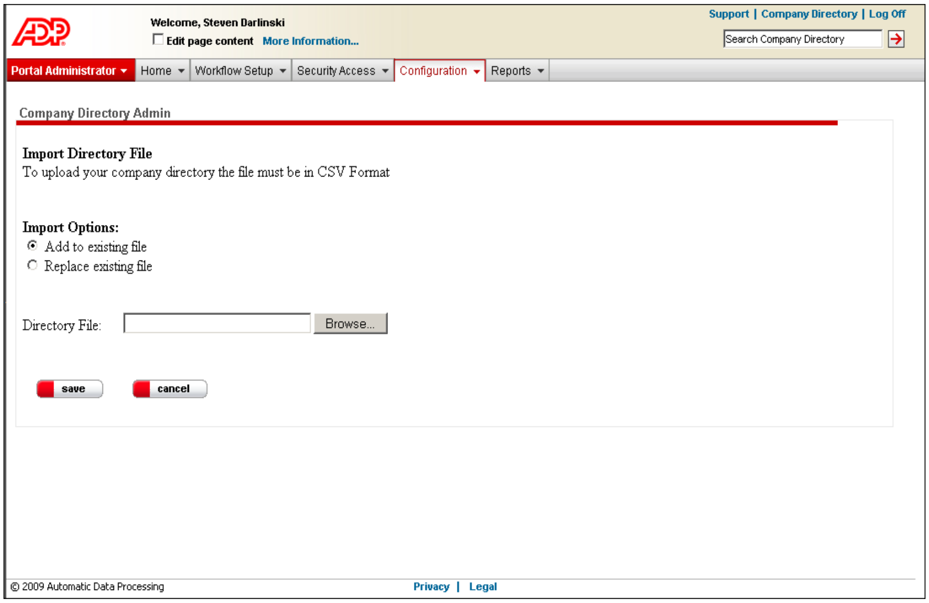
1 Point to **Configuration** and select **Company Directory**.

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**.



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

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

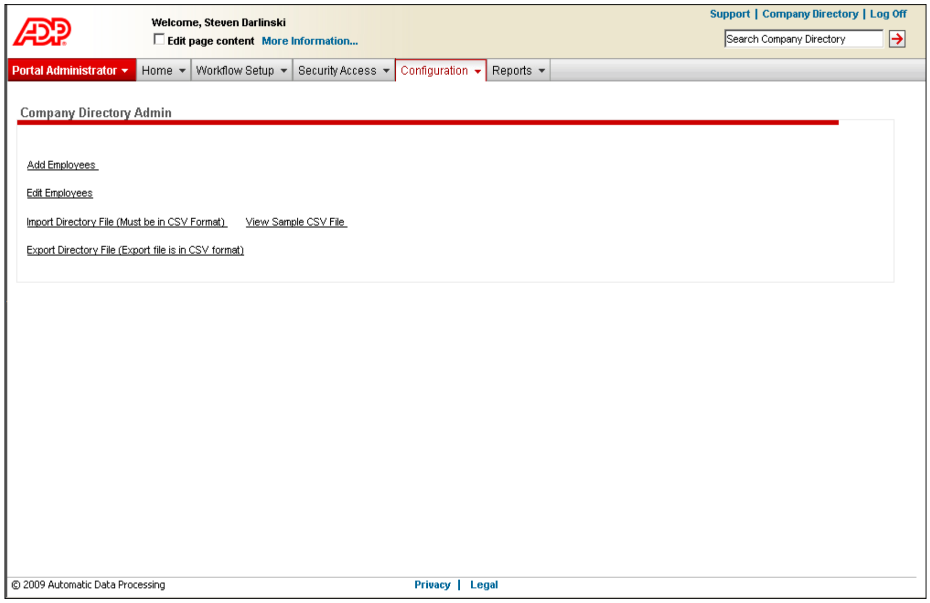
6 Click **Save**.

Exporting Your Directory File

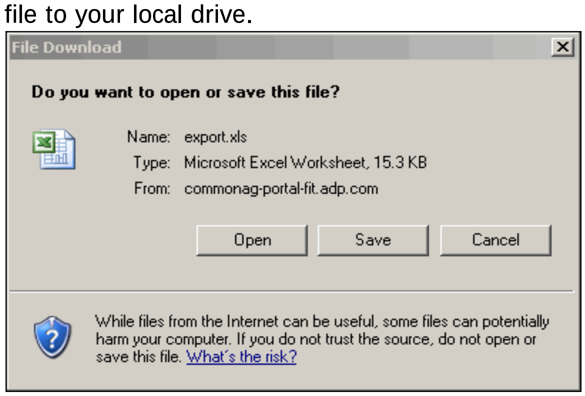
You can export the data in your directory to a .csv file and reformat or change the information using software such as Microsoft® Excel.

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:

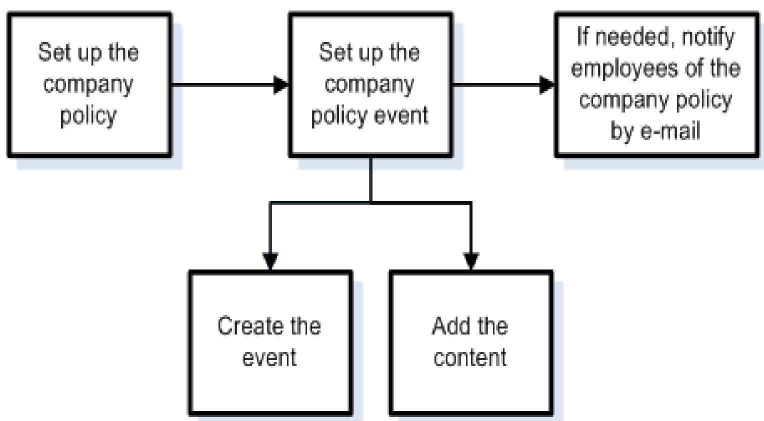
- Having a message pop up when they log on to ADP Workforce Now. This message directs them to where they need to go to read or acknowledge the new policy.
- Sending them an e-mail to let them know about the new policy.

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

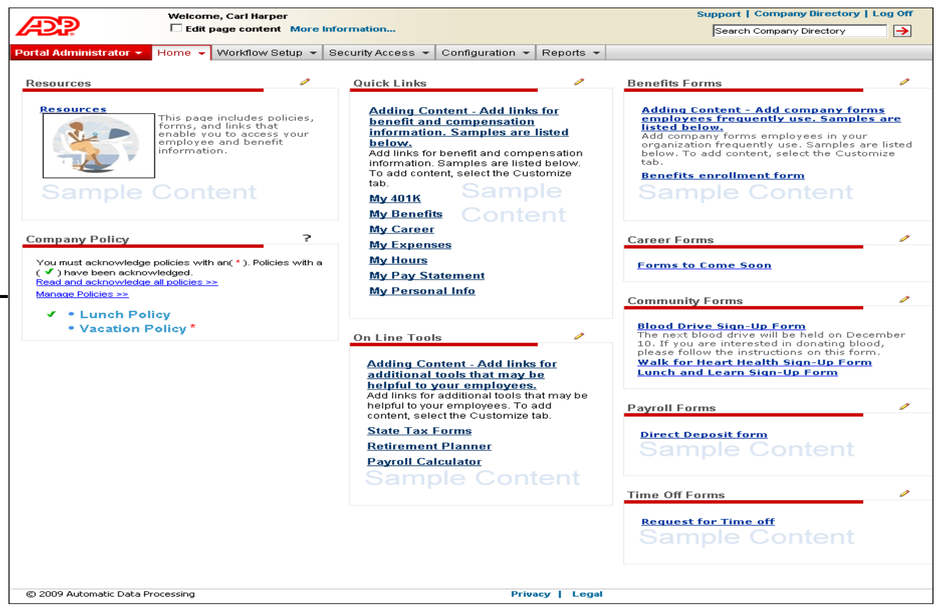
When the content of a company policy is finalized and is ready to be distributed to employees - either as a document file or a link to the policy - you need to first set it up in ADP Workforce Now. This task can be done by your company's HR practitioner or by you.

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**.

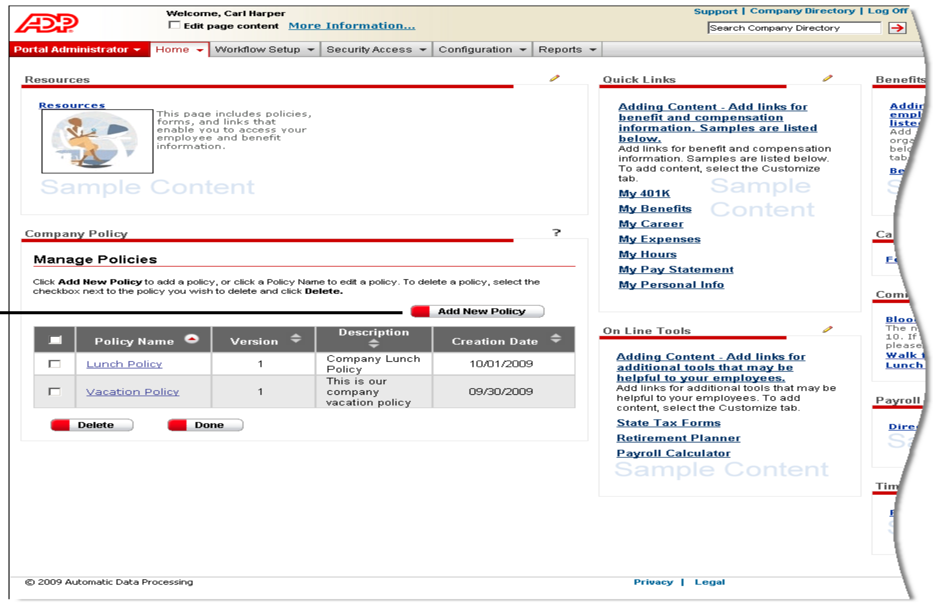
2 In the **Company Policy** area, click **Manage Policies**.

Manage Policies link



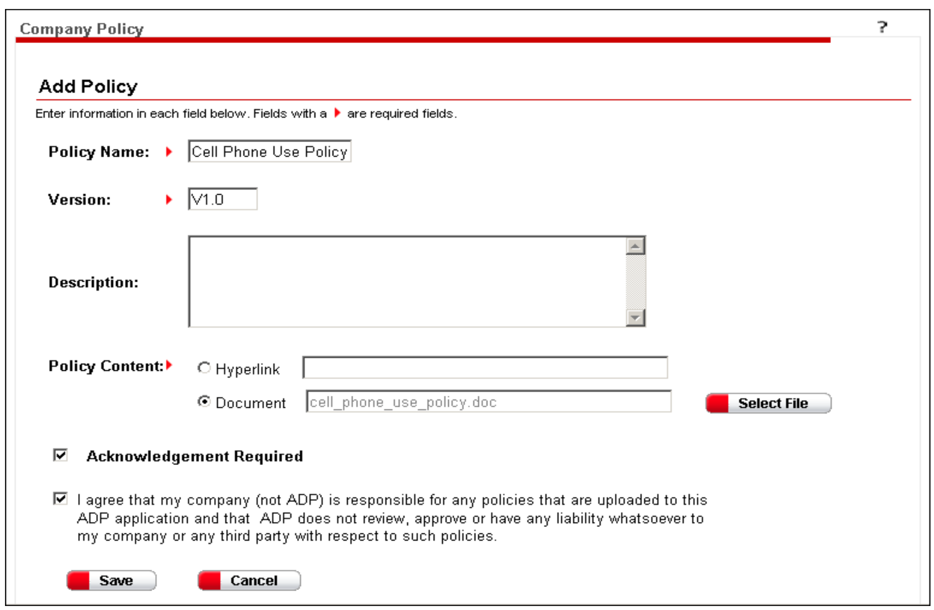
3 Click **Add New Policy**.

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.



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 **Documen**t 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.

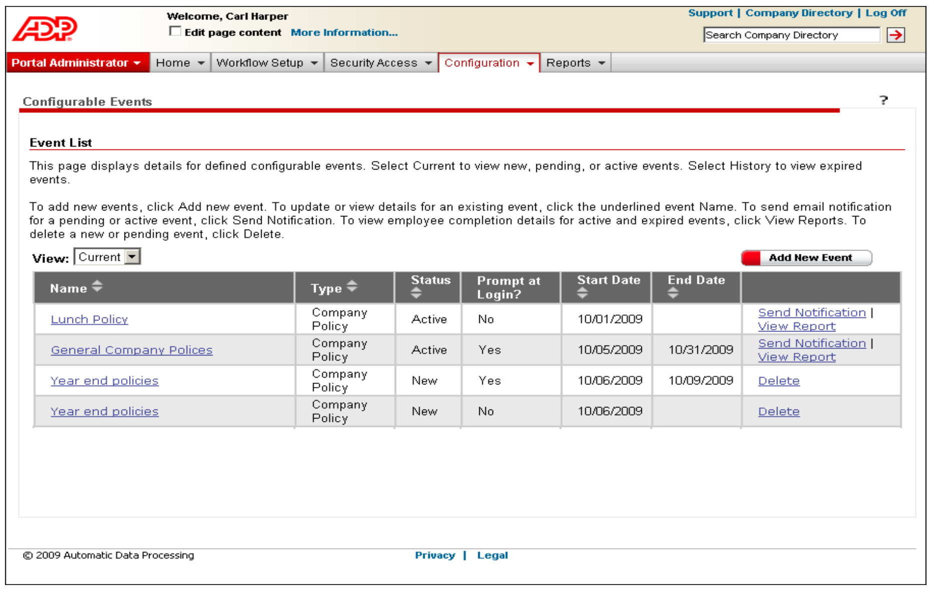
Setting Up a Company Policy Event

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.

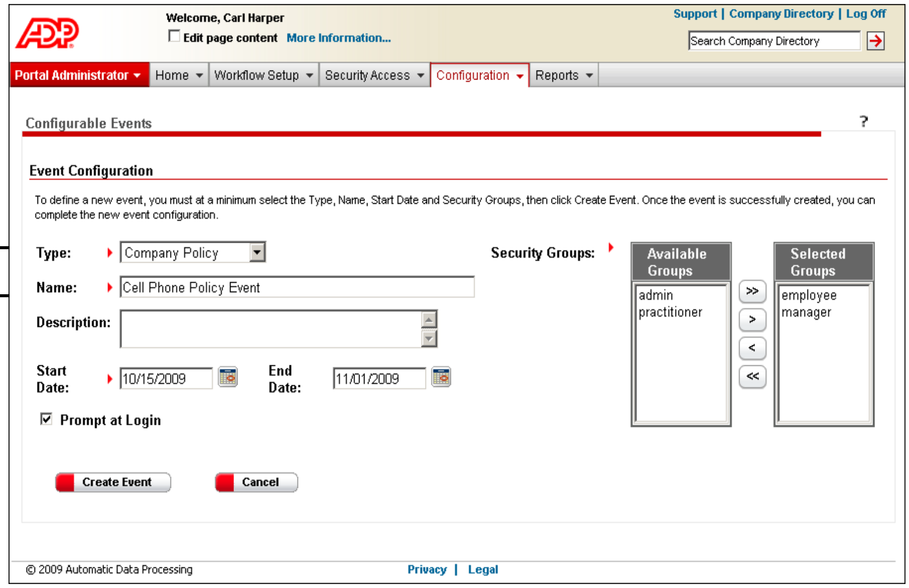
Creating the Event

1. Point to **Configuration** and select **Event Configuration**.
2. Click **Add New Event**.



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

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



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

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

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

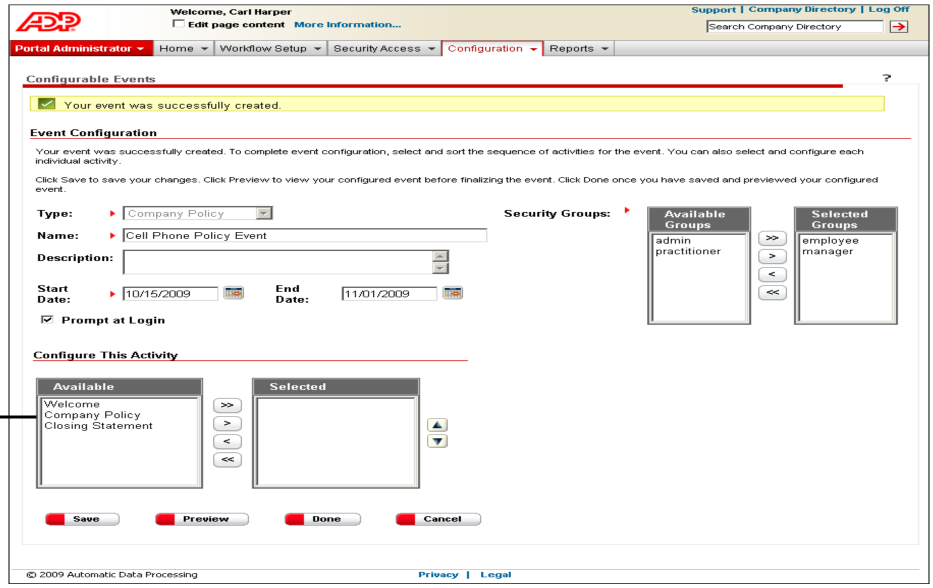
After you create the company policy event, you need to add the content. You can include three items: a welcome message, the actual company policy, and a closing message. Each item is set up as a separate step in the event. The number of policies that you include in an event is up to you. However, you 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:

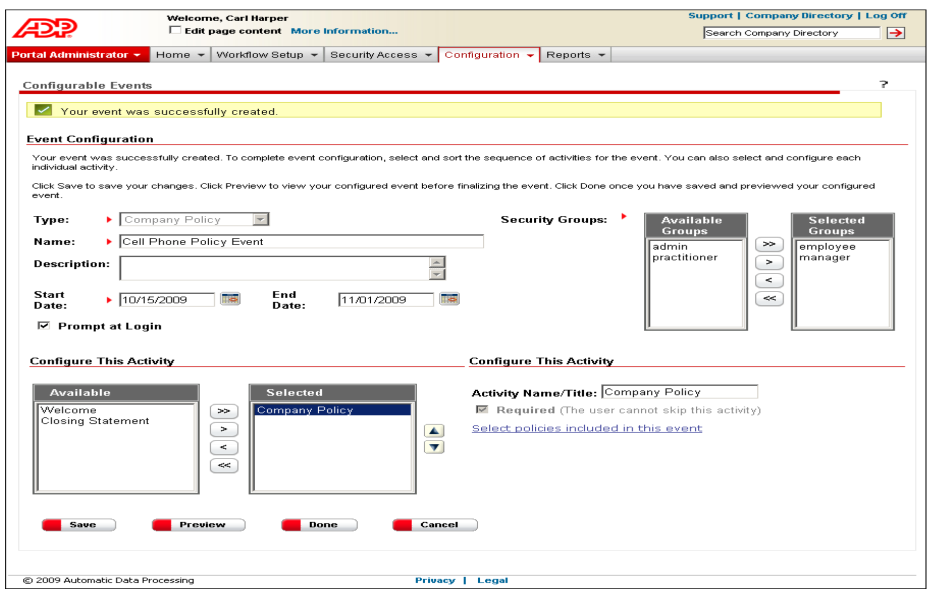
1 In the **Available** list in the **Configure This Activity** area, click what you want to include, and then use the arrow keys to move the items into the **Selected** list. You must select **Company Policy**.

Your available content



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

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

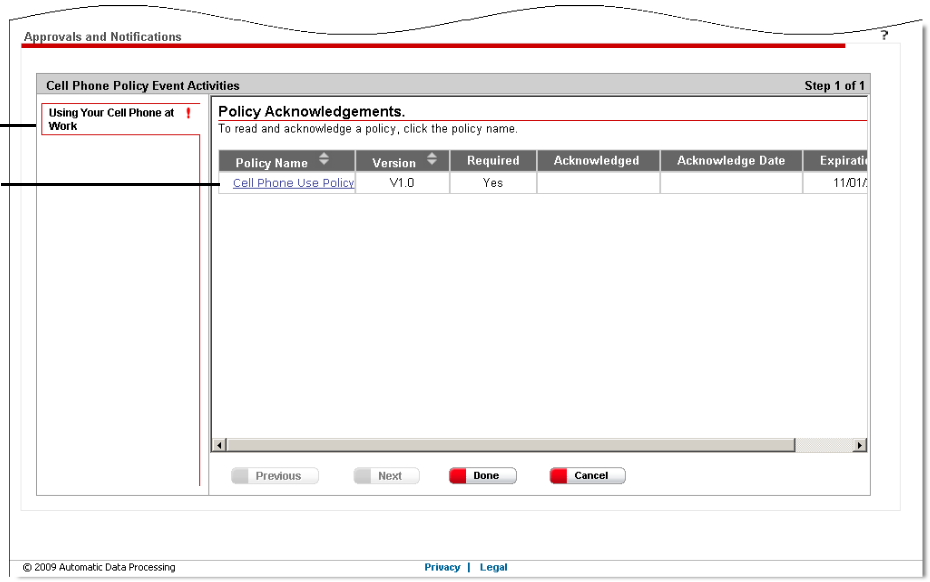


3 To change the title of the step that the employees will see, enter a new name in the **Activity Name/Title** field. The default name is “Company Policy.”

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

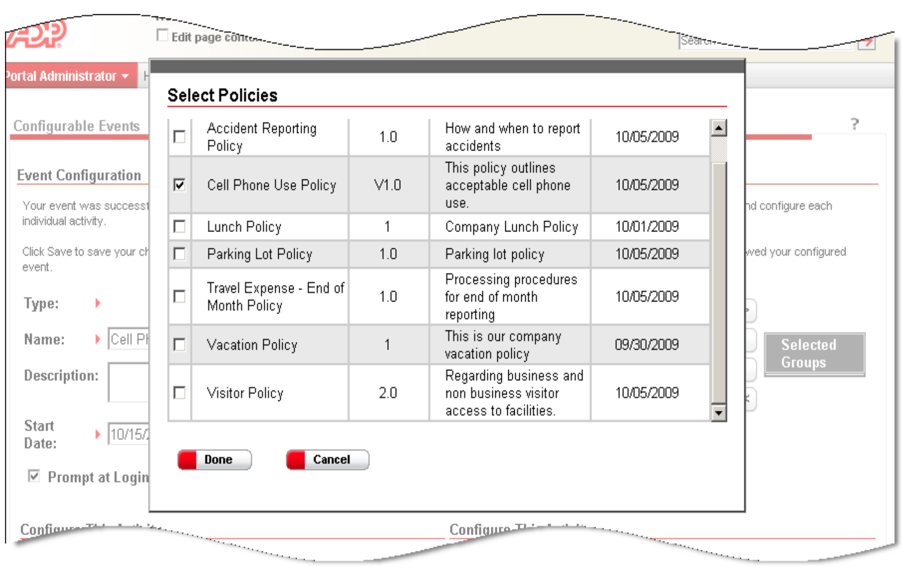
Employees will see the title of the step in the left navigation area.

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



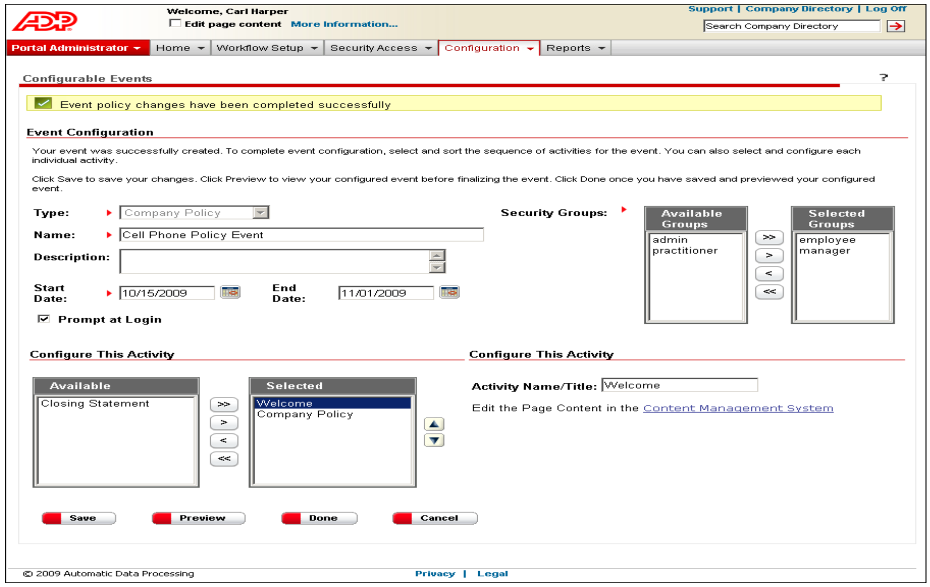
4 Select the policies to include in this event by clicking the **Select policies included in this event** link to the right of the **Selected** list.

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



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

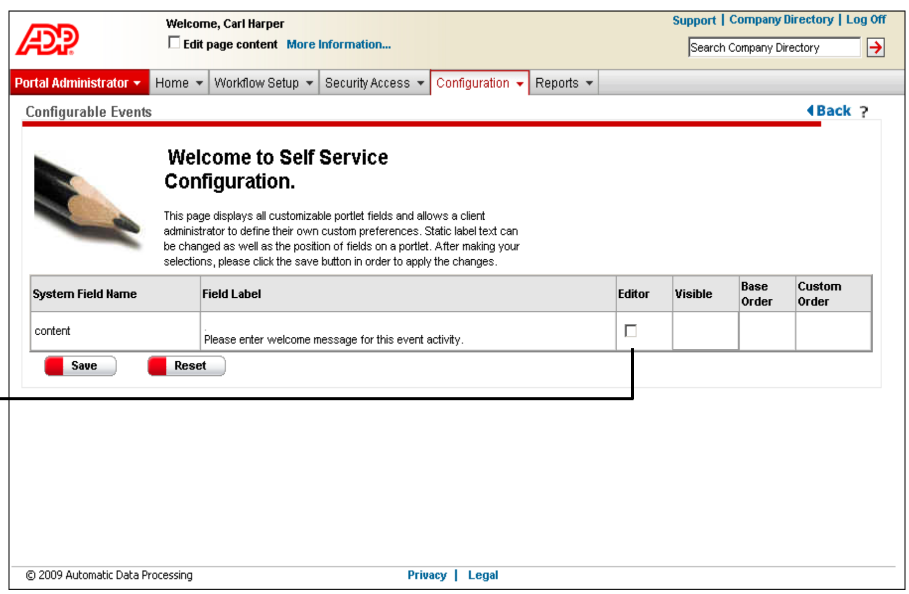
In this example, a welcome message is selected.



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

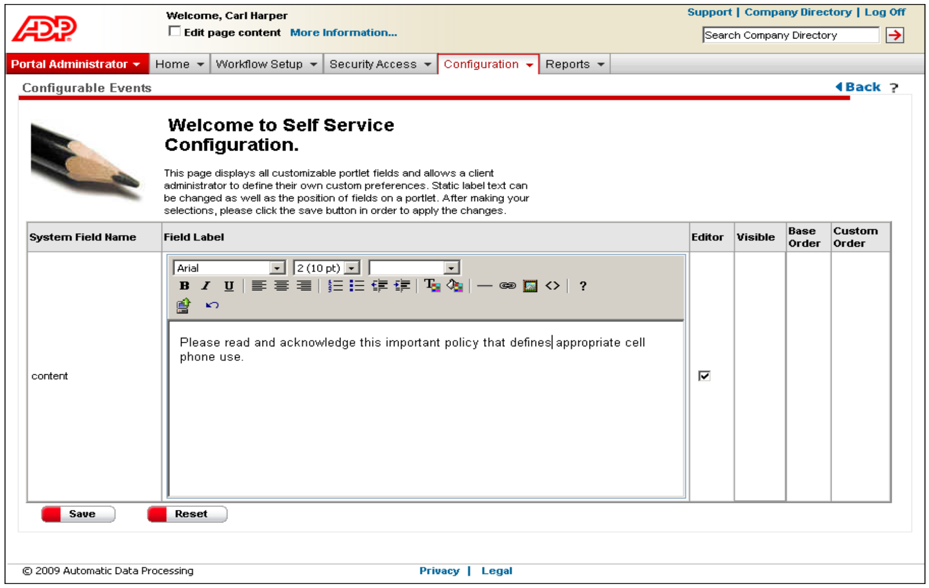
8 To enter text for the welcome or closing message, click the **Content Management System** link to the right of the **Selected** list.

9 Click the **Editor** check box.



Editor check box

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



- To change the appearance of the text, use the toolbar icons.
- To add a link to an ADP Workforce Now page, click the link icon. 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.

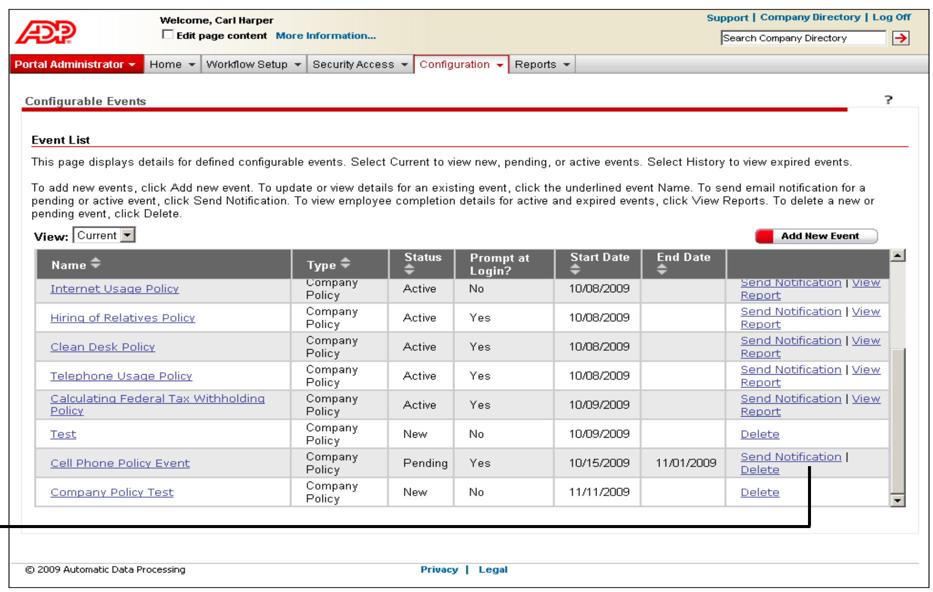
You may want to send a notification to all employees when the company policy is first rolled out to them. Later, you may want to send a reminder to only the employees who have not read or acknowledged the policy, which may be particularly useful if an end date is approaching.

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

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

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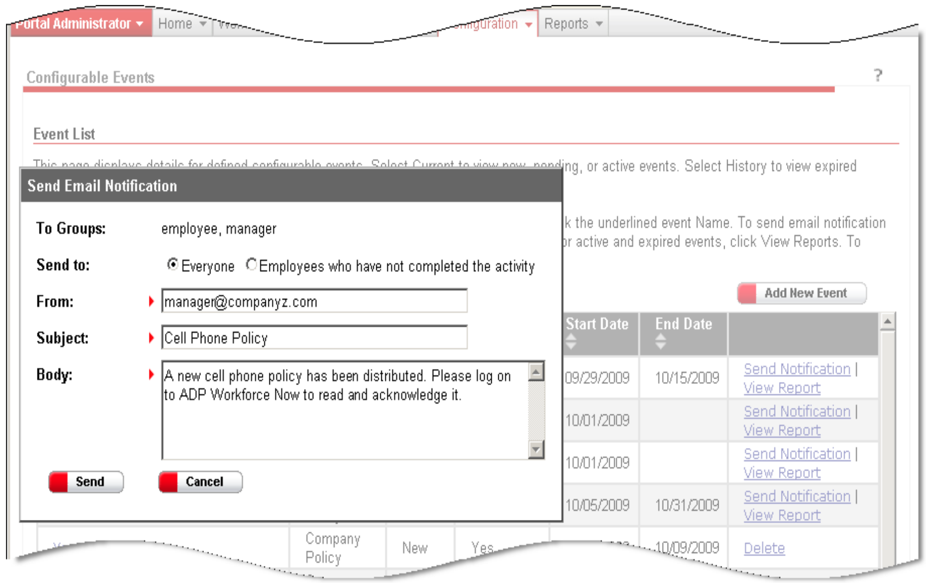
4 Provide the appropriate information. You must make a selection in the **Send to** field and enter information in the **From**, **Subject**, and **Body** fields.

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



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.

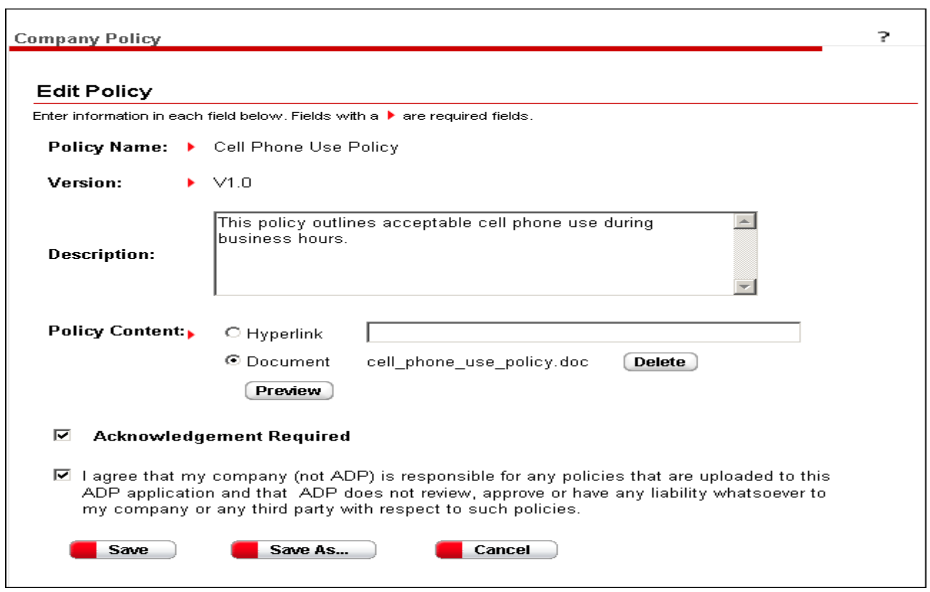
Important: You cannot change policy content once the start date has been reached for the associated event because the policy has been rolled out to employees. However, you can add a new policy and then roll it out through a new event.

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.



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:

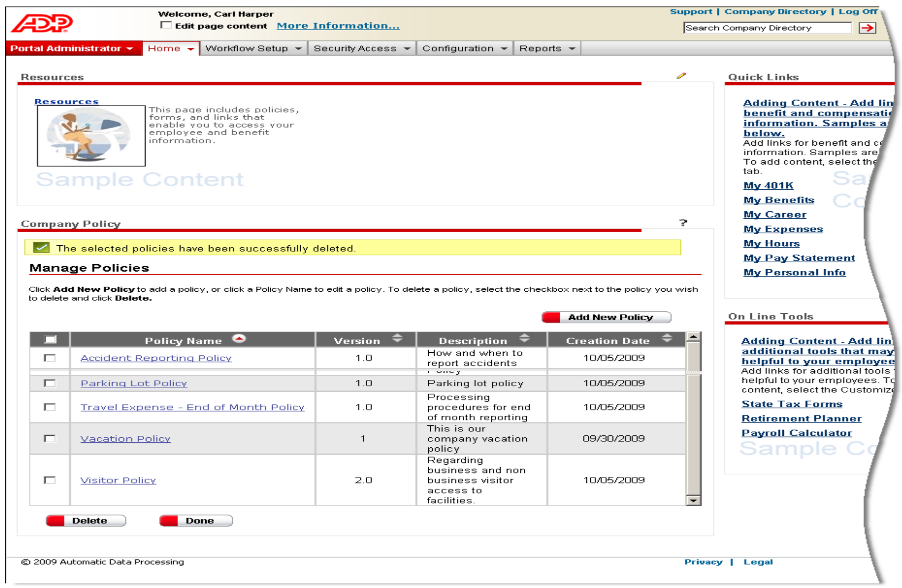
- Save your changes using the same version number by clicking **Save**. You are returned to the updated Manage Policies page.
- Save your changes using a new version number by clicking **Save As**. Enter the new version number, then click to select the check box next to the liability agreement. You must 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.



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.

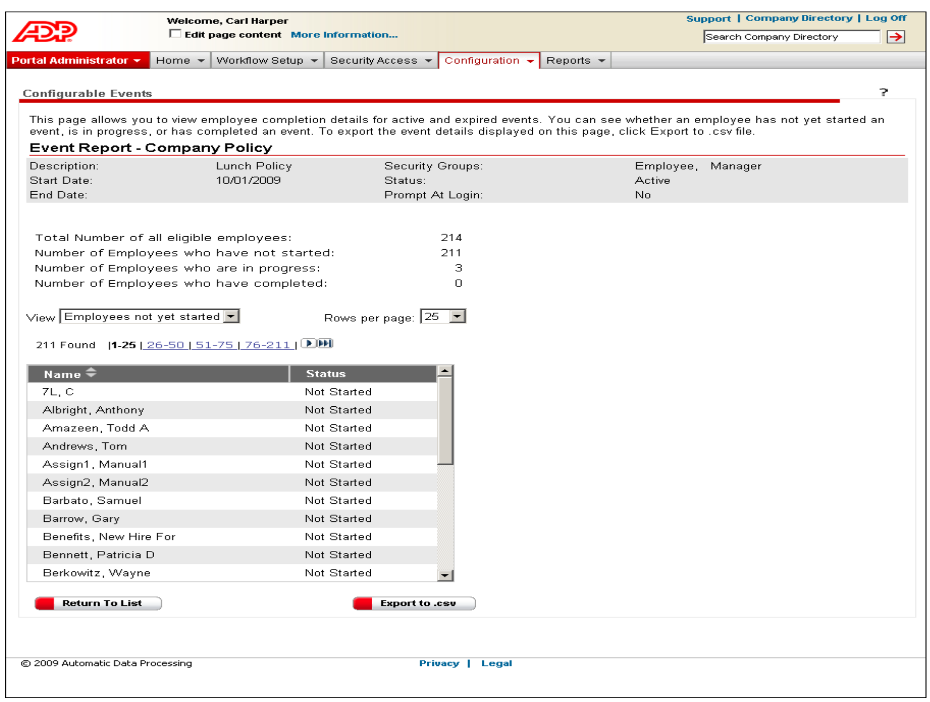
4 In the **View** field, select a report. The options are:

- **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.



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.

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.

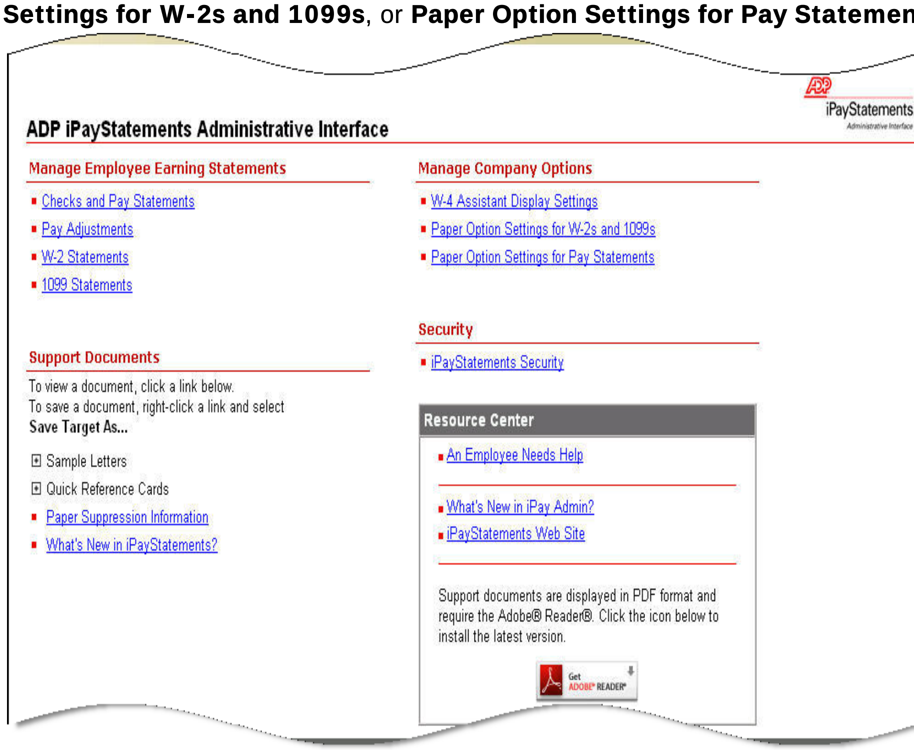
Managing Paper Option Settings

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).

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

Setting Up Calculators

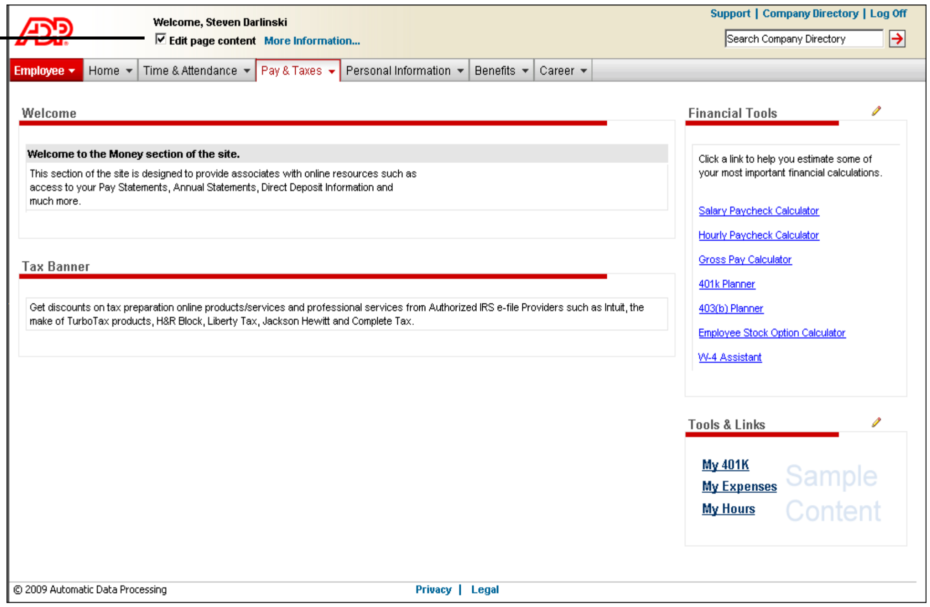
To choose which calculators you want your employees to view, do the following:

1 Point to the Role Selector and select **Employee**.

2 On the **Pay & Taxes** menu, select any menu item.

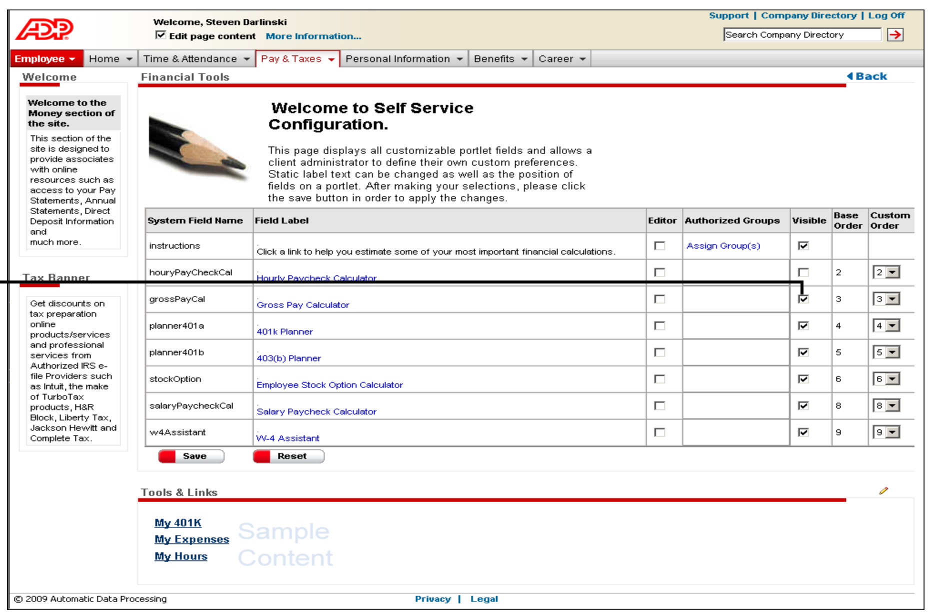
3 In the **Financial Tools** section of the page, click the pencil icon.

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



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

Click to display the associated calculator.



Note: Although you can change the display settings of the W-4 Assistant calculator on the iPay Admin page, we recommend that you make your changes here.

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

Appendix: Adding Smart Links to ADP Workforce Now Pages

You can add links, or jumps, from one ADP Workforce Now™ page directly to another ADP Workforce Now page. This allows you to add a “smart” link that the user can click to immediately access another ADP Workforce Now page.

Example 1:

On the Employee Home page, in the News and Announcements area, you have added information on a new policy allowing associates to have additional direct deposit accounts. You can add a link in the News and Announcements area that takes the 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 Notifica-tions	/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 & Atten-dance	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/TimeOffSum-mary
	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
	Manager Task Assistance 3	/wps/myportal/Manager/ManagerTaskAssistance3
Time & Atten-dance	Home	/wps/myportal/Manager/TimeAttendance/Home
	Timecards	/wps/myportal/Manager/TimeAttendance/Timecards
	Schedules	/wps/myportal/Manager/TimeAttendance/Schedules
	Employees	/wps/myportal/Manager/TimeAttendance/Employees
My Team	Team Summary	/wps/myportal/Manager/MyTeam/TeamSummary
	Hire Employee	/wps/myportal/Manager/MyTeam/HireEmployee
	Talent Search	/wps/myportal/Manager/MyTeam/TalentSearch
	Direct Reports	/wps/myportal/Manager/MyTeam/DirectReports
	Managing Work Events	/wps/myportal/Manager/MyTeam/ManagingWorkEvents
	Employee Career Profile	/wps/myportal/Manager/MyTeam/EmployeeCareerProfile
	Proxy Assignment	/wps/myportal/Manager/MyTeam/ProxyAssignment
Recruiting	Recruiting - Search	/wps/myportal/Manager/Recruiting/RecruitingSearch
	Application Management	/wps/myportal/Manager/Recruiting/ApplicationManagement
	Screening Settings	/wps/myportal/Manager/Recruiting/ScreeningSettings
	Resource Library	/wps/myportal/Manager/Recruiting/ResourceLibrary

ADP Workforce Now Menu	Option Page	URL
Reports	HR & Benefits Reports	/wps/myportal/Manager/Reports/HRBenefitsReportsMan-agement
	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/ApprovalsAndNotifica-tions
	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/Communica-tion
	Settings	/wps/myportal/Practitioner/RecruitingStaffing/Settings
	Resource Library	/wps/myportal/Practitioner/RecruitingStaffing/ResourceLi-brary
	Welcome	/wps/myportal/Practitioner/RecruitingStaffing/Welcome
	Background Check	/wps/myportal/Practitioner/RecruitingStaffing/Background-Check
	Tax Credit Screening	/wps/myportal/Practitioner/RecruitingStaffing/TaxCred-itScreening
	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/TimeAttendanceRe-ports
	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
	Event Workflow	/wps/myportal/Administrator/WorkflowSetup/EventWorkflow
Security Access	Security Groups	/wps/myportal/Administrator/SecurityAccess/SecurityGroups
	Membership Rules	/wps/myportal/Administrator/SecurityAccess/MembershipRules
	View User	/wps/myportal/Administrator/SecurityAccess/ViewUser
Configuration	Company Directory	/wps/myportal/Administrator/Configuration/CompanyDirectory
	Theme Configuration	/wps/myportal/Administrator/Configuration/ThemeConfiguration
Reports	Policy Acknowledgement	/wps/myportal/Administrator/Reports/PolicyAcknowledgement

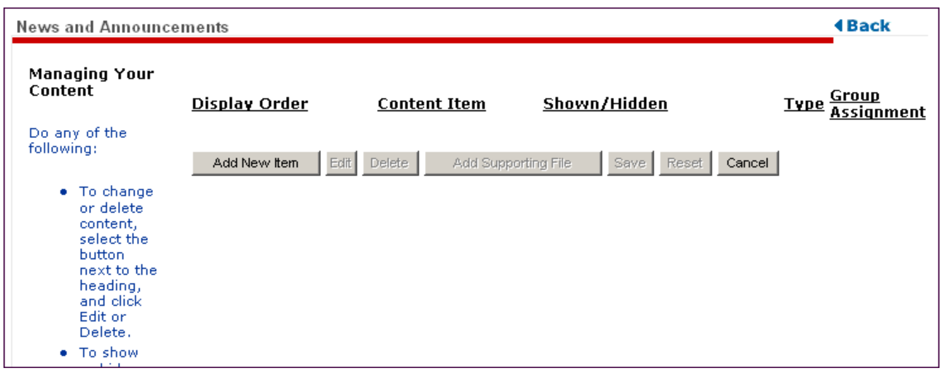
ADP Workforce Now Menu	Option Page	URL
	Audit Trail for Past Policies	/wps/myportal/Administrator/Reports/AuditTrailforPastPolicies

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:

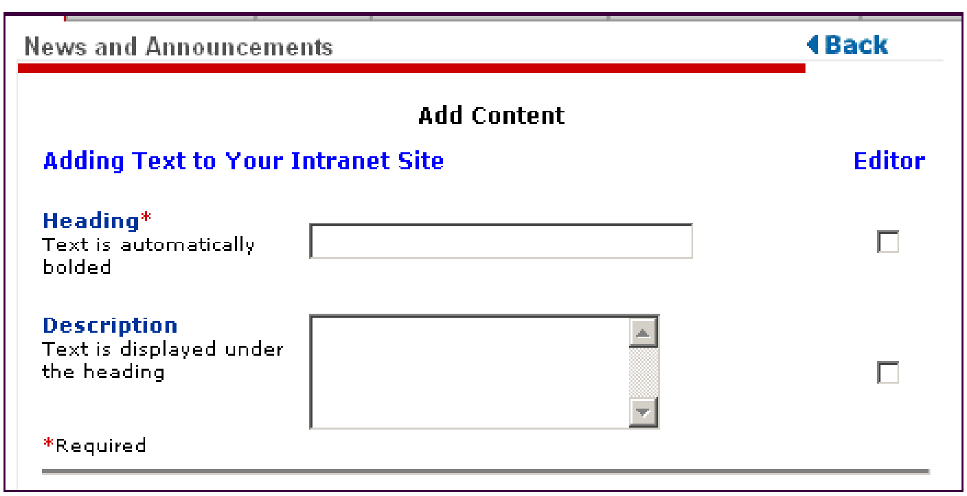
1 Navigate to the page and locate the section where you want to add a smart link. Then click  (Pencil/Configure icon).

The Configuration page for the selected page displays.



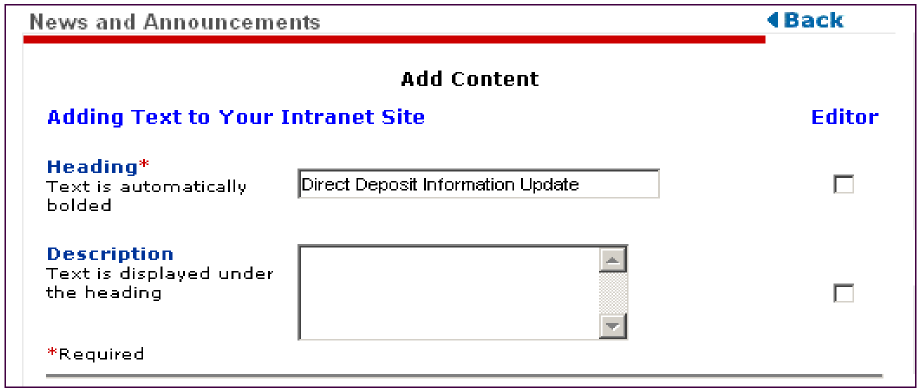
2 Click **Add New Item**.

The Add Content page displays.

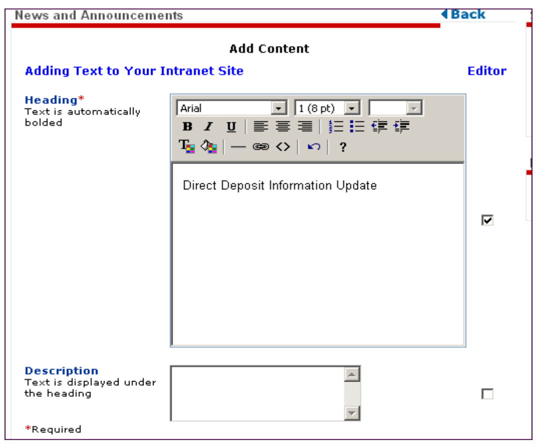


3 Enter a heading, then click to select the **Editor** check box to the right of the heading.

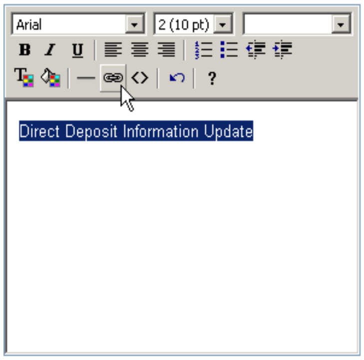
Note: In this example, we will make the heading a link to the Employee Direct Deposit page. If you want to make the description the link, add a description, then click to select the **Editor** check box to the right of the **Description** field and continue with the following instructions.



4 The editor page displays with your heading displayed.

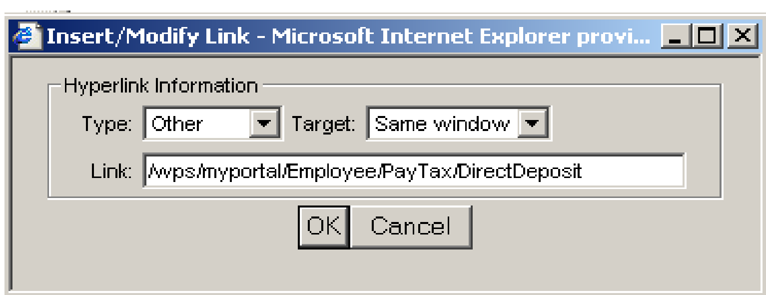


5 Highlight the text and click .



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.