

User Manual for

ADP Manager Self Service

Introduction to Manager Self Service (MSS)

In Manager Self Service (MSS), Employee related data may be entered, updated, and approved if necessary. Practitioners and Managers will enter and submit employee changes in MSS that will automatically feed into the Employee Record, Enterprise System (Ev5). For entries requiring approval, Workflows will route employee change requests to the Benefits, Compensation, Recruitment or Executive groups, and an electronic audit trail will be created. This new system will streamline the way employee information is managed in our HRIS system by ensuring accurate data, initiating and tracking approvals, and limiting mistakes that can be made throughout a manual data entry system.

Introduction to Workflow in Manager Self Service

Employee data changes submitted in MSS are referred to as work events and will follow various pre-approved workflow paths. While certain events such as Supervisor Changes required no workflow and immediately update Ev5, other events require the approval of the Budget, Compensation or Benefits Department, if your institutions require it. Institution Specific business rules built into the workflows ensure events are routed to the appropriate workflow. Work events submitted for approval but not yet approved or rejected remain pending and will not update Ev5.

A couple examples of workflows with Business Rule Exceptions in MSS are:

- Changes to an employee's salary or job code – requires Compensation approval.
- Increasing an employee's salary by X% or XK or greater – requires Compensation and Executive HR approval.

All workflows are routed automatically after the event has been submitted by a Manager. When approval is needed, a task is assigned to each approver in MSS and email alerts, notifications, are sent as a reminder that tasks have been generated. The Initiating Manager will receive an e-mail alert when the event has been approved or rejected. In addition, anyone in the workflow that has an approval or rejection responsibility has the ability to view the status of the event workflow, after the event reaches them.

For more information regarding event approvals in MSS, please refer to “Managing Work Events Approvals / Notifications”.

Fundamentals of Manager Self Service

To setup Manager Self Service in USG's system there are several components that must be configured to allow the system as a whole to function.

Work Events: Work Events are the normal events that are done in institutions all around USG. These events consist of Hiring, Rehiring, Transfers, Pay Raises, Job Changes, and Employment Status Change.

Work Groups: Groups of people that will be given the ability to accept/reject events as they come across their desk, as setup up in the work flow.

Work Flow: A specific approval path that an event will take. Work Flows are pre-defined by the institutions MSS committee, and setup by the SSC. A work flow step can be directed towards a Specific User, Transfer to Manager, Up (to managers in the reporting hierarchy) and a Work Group. A work flow could consist of either approvals or notifications. Approvals will pause the event work flow until the time in which the Manager or Work Group approvals or rejects that specific event. Notification, if chosen for the activity, will send an email to the person(s) involved, the event will pass on to the next step in the workflow.

Business Rules: Rules that define which work flow will become active. There are two types of business rules for the USG MSS System. Default Business Rules define the specific group of employees that have been defined as being associated to a specific work flow. Default business rules have to be setup in the portal to make a figurative umbrella over all of the employees at a specific institution. Exception Business Rules are rules that define exceptions to the default business rule. For example a default business rule defines a group of employees that will be selected as "Faculty", the exception for this rule would be if a raise of 3% were to go through, than an approval by the President will be required. Important: The default business rule must cover all of the employees at an institution without creating overlaps in the overage.

Event Workflow: Define which work flow will be connected to which business rule.

Priority: An order can be defined as to which business rules the system will recognize first. The Priority is used when exceptions are involved in the setup of the institution.

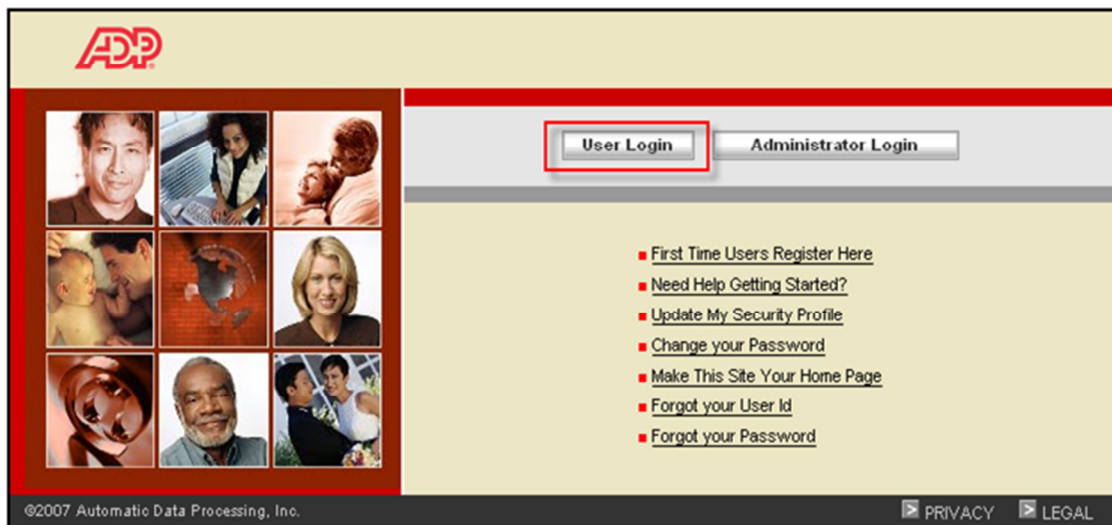
Proxy: An Alternate Manager(s) that can take the responsibility of an approval/rejection of a work event. There are two different proxy types setup in the USG system Default and Manager Assigned Proxies. Default Proxy is setup at the SSC to care for lost events, events that have been stalled or employees that have not been defined in a business rule; these events will be sent to the SSC at MSS@SSC.USG.EDU. Manager Assigned Proxies are defined by a manager and overrules the default proxy, however offers the same functions. A manager can setup a default assigned proxy and a vacation proxy or proxy setup from Date to Date.

Logging into Manager Self Service

You will access MSS from the ADP Portal:

Launch your web browser (Internet Explorer 7 or 8 recommended) and navigate to:
www.portal.adp.com

Click on the **User Login** button.



ADP Portal Login Screen (www.portal.adp.com)

In the login Windows enter your ADP portal **username** and **password** (Three failed attempts will result in a frozen account). The standard username is your first initial followed by your last name, ending with @usg. For example, John Smith's Username is "Jsmith@usg". (Your specific username will be issued by the SSC HRIS department.) If you are having trouble with logging into the portal please contact USGDATAHELP@SSC.USG.EDU. Note: Username are not case sensitive, however, passwords are. (Administrator Logins may be used; however, digital certificates are required for Administer and Practitioner.)

After you have logged in, the ADP Portal Welcome page will be displayed. From the Welcome page you can then select which role you would like to use the functions of; Employee, Manager, Practitioner, Administrator. (Note: A Practitioner can use the roles of a Practitioner as well as

Manager and Employee; however, a Manager can only use the roles of Manager and Employee.)
View Figure 1 for screen shot, located on follow page.

Manager Self Service Layout and Navigation

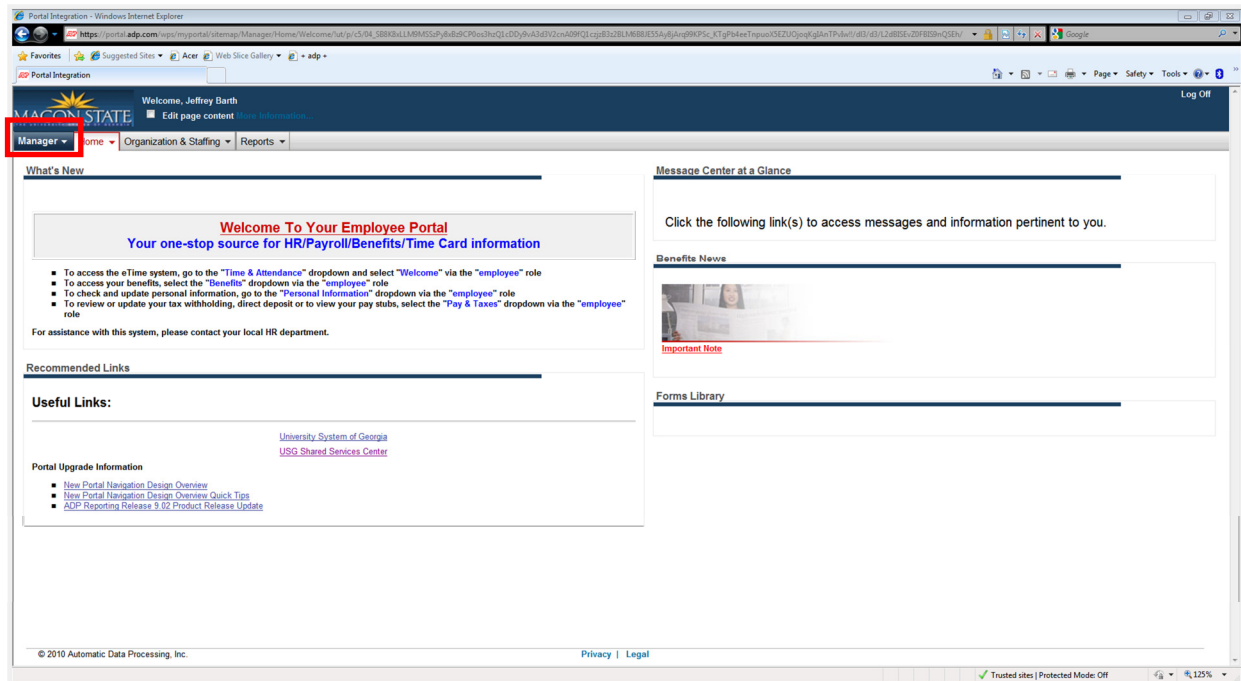


Figure 1 - Manager Welcome Screen

To perform tasks in Manager Self Service that Manager role should be in the upper left hand corner of the screen. (Highlighted by red box) If another role is currently selected click the drop down menu and select Manager. (Your welcome screen for your institution may vary from figure 2) Note: A Practitioner rule can perform the same functions as a manager.

The following chart shows what menus are available from the Manager tab*:

Manager Tab Menu Items		
Home	Organization & Staffing	Reports
Welcome	Direct Reports	Manager Reports
Message Center	Managing Work Events	
Approval History	Proxy Assignments	

*Menu layout will vary depending on security.



While you are in the application you should **not** press the **Back Arrow** button in your browser window to go back to the previous screen in ADP Portal. When available, always click the Cancel or Back button to return to the previous screen.

Working with Manager Self Service

Initiating Work Events

Initiate Work Events

Login to the portal under the User Login at www.portal.adp.com. (Administrator Login may be used by required the use of a digital certification)

While logged in as a manager you can initiate work events. You can do this by selecting the manager role from the role selector on the upper left hand of the welcome screen. See figure 1 above for details.

Once in the manager user role you can initiate the work events by going to 'Managing Work Events' located under the 'Organization & Staffing' tab. See figure 2 below.

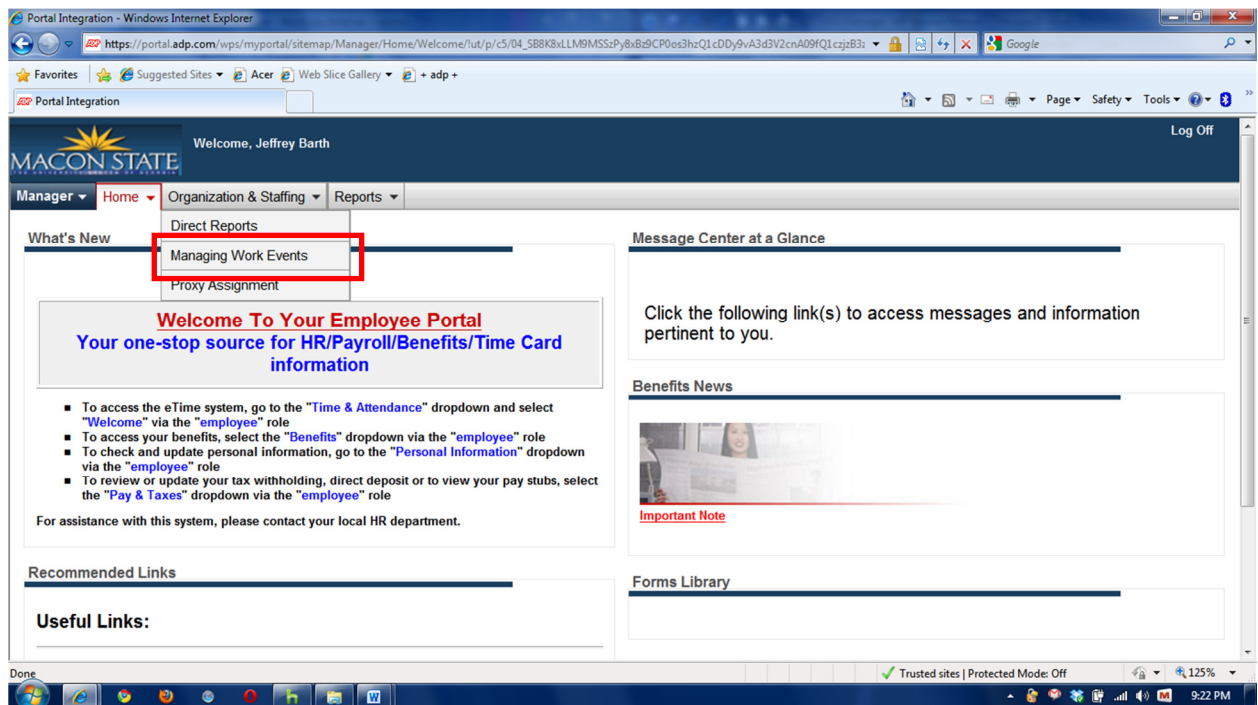


Figure 2

This will then bring up the 'Managing Work Events' home screen that is able to start work events that have been setup in the portal. At this screen those employees that are direct reports of a manager will be able to be viewed, and events started on them. See figure 3 below.

Managing Your Employees

Select the appropriate actions below for your employees.
Click Submit to perform the actions on the selected employee.

What do you want to do?

☐ Hire New Employee ☐ Rehire Employee

☐ Transfer Employee(s) ☐ Change Job Status

☐ Change Job & Salary Information ☐ Change Employment Status

Select the employee(s) you want to work with:

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input type="checkbox"/>	Januario DePonte	00995X - Affiliate Non-Compensated	Active	07/13/2010	07/13/2010

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Figure 3

From this screen all the different event types may be initiated. The events with the box next to them are events that are initiated on an existing employee that reports to the logged in manager either as a direct report or as a drill down report. These events consist of Employee Transfers, Changing one Job and Salary, Changing ones Job Status, and Changing Ones Employment Status. See Figure 3 above.

To initiate one of these events an employee must have a check next to his/her name, than the event(s) that you wish to start must have a check in the box next to the event type, then press submit. This then takes the initiator to a screen that allows them to enter information pertaining to the event.

1. If more than one event is selected, then the 1st Screen after selecting the event type and clicking submit allows the initiator to enter the effective date and any comments that they wish to about the specific event(s) that is/are being initiated. See figure 4 below.
2. After any comments about the event have been entered click the button. Items that have a red arrow are required items, and the system will not allow the next step to start unless those field are filled out. For Example in figure 4 the Effective Date is required thus is must be filled out before continuing to the next. To go back to the pervious screen press the button. (Note: If the back button of the browser window is used the user will be logged out and it will require them to relogin and redo any steps that they have done before.)

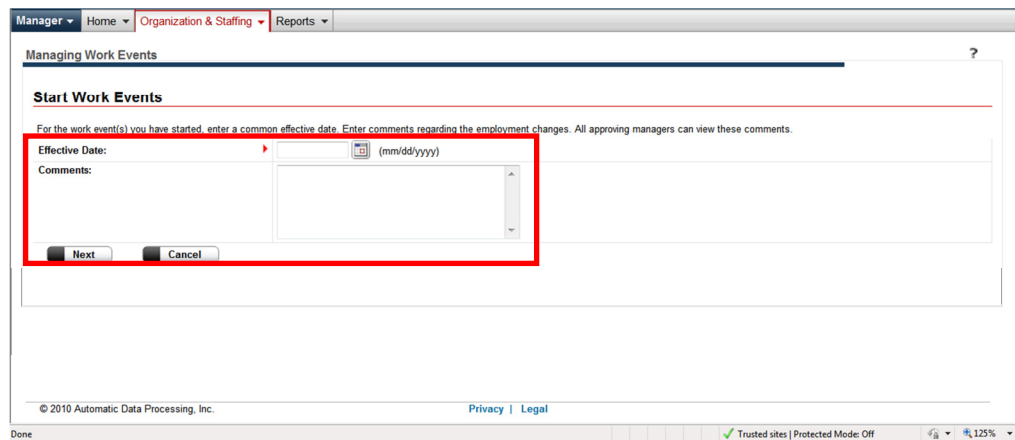


Figure 4

Steps for Initiating “Transferring Employee”

3. Select what type of transfer that is being done. IE: Manager, Department, Location.
This is a required field and must be filled out before proceeding to the next step. When ready to continue click the **Submit** button.
4. After all desired and required fields have been entered press the **Submit** button to proceed to the next step. If you need to go back press the **Cancel** button. If the browser back button is used you will be required to re-login to portal using the portal login at www.portal.adp.com. If you would like to restart the form press the **Reset** button. See Figure 5.
5. This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The Approval activity requires action on the part of the Manager(s), either to approve or Reject the Activity. When all the Approvals or Notifications have been successfully meet, than the event will be populated in Employee Record in Ev5.

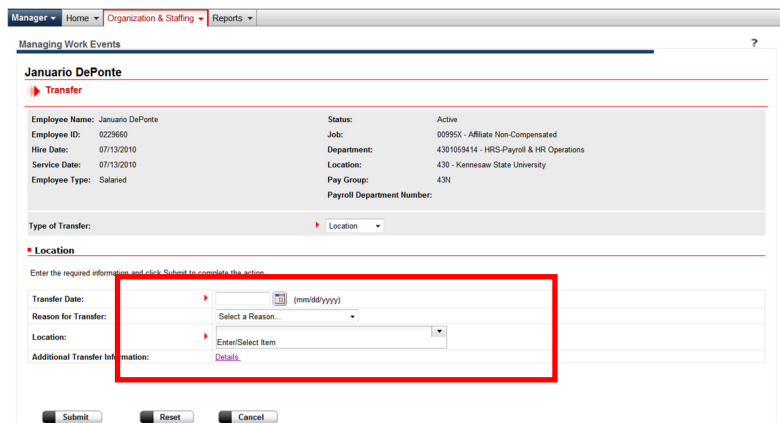


Figure 5 - Transfer

Steps for Initiating “Change Job Status”

3. Enter Information that is required. Required information is indicated by a red arrow next to the box. IE: Effective Date. Other information may be entered as well. IE: Reason for the Job Status Change, whether the employee will be a Regular or Temporary Employee, whether the employee will be a Full or Part-Time Worker, which shift they will be a part of, these can include either using the job shift or not applicable, how many hours they employee will be required to work, what the classification of the employee will be, what level of security clearance the employee will be granted if any, whether the employee is a full time student or not, and any other details that need to be entered. See figure 6.
4. After all desired and required fields have been entered press the **Submit** button to proceed to the next step. If you need to go back press the **Cancel** button. If the browser back button is used you will be required to re-login to portal using the portal login at www.portal.adp.com. If you would like to restart the form press the **Reset** button. See figure 6.
5. This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The 'Approval' activity requires an action on the part of the Manager(s), either to approve or reject the activity. When all the Approvals or Notifications have been successfully meet, than the event will be populated in Employee Record in Ev5.

Managing Work Events

Januario DePonte

Change Job Status

Employee Name: Januario DePonte	Status: Active
Employee ID: 0229660	Job: 00995X - Affiliate Non-Compensated
Hire Date: 07/13/2010	Department: 4301059414 - HRS-Payroll & HR Operations
Service Date: 07/13/2010	Location: 430 - Kennesaw State University
Employee Type: Salaried	Pay Group: 43N
Payroll Department Number:	

Change Job Status

Enter the required information and click Submit to complete the action.

Effective Date: (mm/dd/yyyy)

Reason:

Regular/Temporary: ☐ Regular ☒ Temporary

Full/Part Time: ☒ Full-Time ☐ Part-Time

Shift:

Standard Hours:

Employee Classification:

Security Clearance:

Full Time Student: ☐ Yes ☒ No

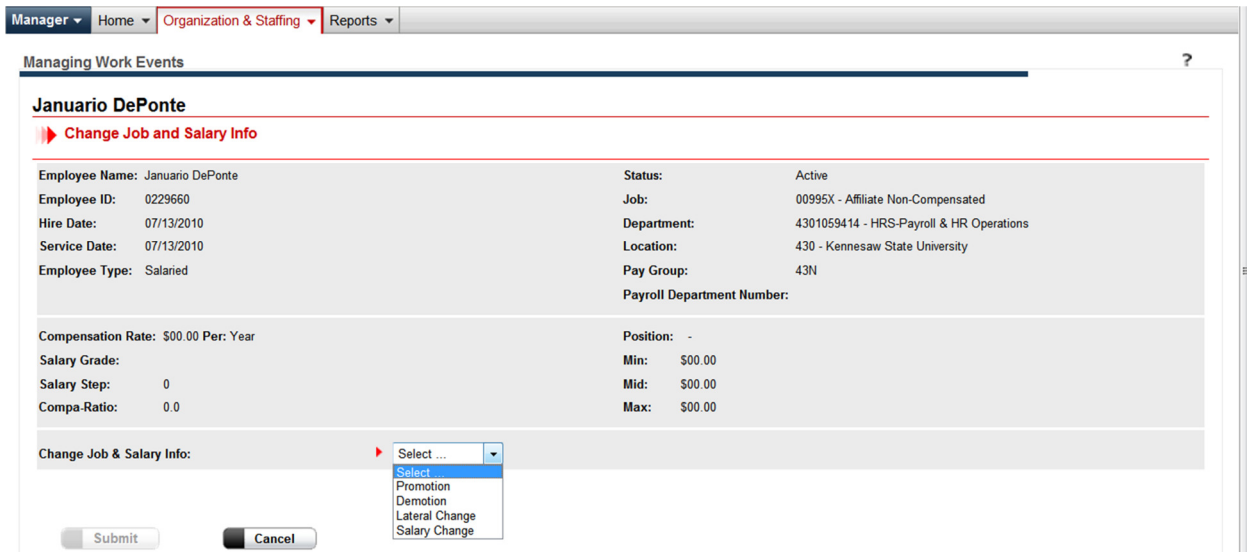
Additional Job Status Information: [Details](#)

Submit **Reset** **Cancel**

Figure 6 – Change Job Status

Steps for Initiating “Change Job and Salary Info”

3. Select which job or salary change you would like to make. IE: Promotion, Demotion, Lateral Change, Salary Change. See Figure 6.



Managing Work Events

Januario DePonte

Change Job and Salary Info

Employee Name: Januario DePonte	Status: Active
Employee ID: 0229660	Job: 00995X - Affiliate Non-Compensated
Hire Date: 07/13/2010	Department: 4301059414 - HRS-Payroll & HR Operations
Service Date: 07/13/2010	Location: 430 - Kennesaw State University
Employee Type: Salaried	Pay Group: 43N
	Payroll Department Number:

Compensation Rate: \$00.00 Per: Year	Position: -
Salary Grade:	Min: \$00.00
Salary Step: 0	Mid: \$00.00
Compa-Ratio: 0.0	Max: \$00.00

Change Job & Salary Info: Select ...

- Select
- Promotion
- Demotion
- Lateral Change
- Salary Change

Figure 7

- Enter information pertaining to the type of job or salary change selected. This information could include, but is not limited to required information, Effective Date, non-required information, Reason for the change, New position, New Job, Business Title, Employee Type, and Change rate either Percent or specific amount. See Figure 8. Depending on which type of change is selected screen may differ slightly.
- After all desired and required fields have been entered press the button to proceed to the next step. If you need to go back press the button. If the browser back button is used you will be required to re-login to portal using the portal login at www.portal.adp.com. If you would like to restart the form press the button. See figure 8.
- This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The 'Approval' activity requires an action on the part of the Manager(s), either to approve or reject the activity. When all the Approvals or Notifications have been successfully meet, than the event will be populated in Employee Record in Ev5.


Figure 8 - Change Job and Salary Info

Steps for Initiating “Change Employment Status”

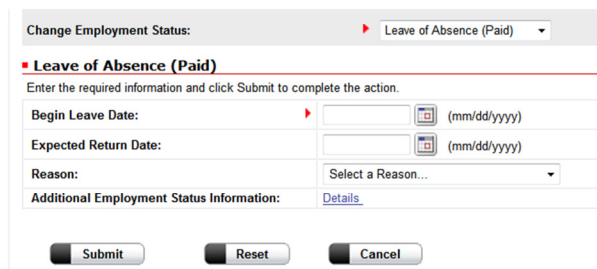
3. Select which type of Employment Status Change is desired. IE: Leave of Absence (Paid), Leave of Absence (Unpaid), Terminate. See Figure 9.

Figure 9

4. Enter additional information about the change in employment. Leave of Absence (Paid/Unpaid) types require a Begin Leave Date, indicated by a red arrow. Other information such as Expected Return Date and Reason for the leave may also be entered at this time. (See Figure 10) Terminations require a date of termination and Reason for the Termination, indicated by the red arrow. Other information such as if the employee will be eligible for Re Hire and/or Severance, as well as Date they were given notice and/or last day they worked may also be filled out at this time. If an employee has lost his/her life an event of employee Change Employment Status selecting “Terminate” could be used to indicate that event. See Figure 11.
5. After all desired and required fields have been entered press the button to proceed to the next step. If you need to go back press the button. If the browser back button is used you will be

required to re-login to portal using the portal login at www.portal.adp.com. If you would like to restart the form press the  button. See figure 10 or 11.

- This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The 'Approval' activity requires an action on the part of the Manager(s), either to approve or reject the activity. When all the Approvals or Notifications have been successfully meet, than the event will be populated in Employee Record in Ev5.



Change Employment Status: Leave of Absence (Paid)

Leave of Absence (Paid)

Enter the required information and click Submit to complete the action.

Begin Leave Date: (mm/dd/yyyy)

Expected Return Date: (mm/dd/yyyy)

Reason: Select a Reason...

Additional Employment Status Information: [Details](#)




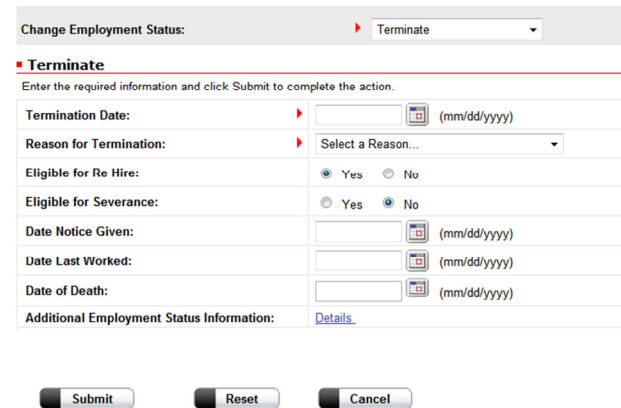
  

Figure 10 - Leave of Absence



Change Employment Status: Terminate

Terminate

Enter the required information and click Submit to complete the action.

Termination Date: (mm/dd/yyyy)

Reason for Termination: Select a Reason...

Eligible for Re Hire: ☒ Yes ☐ No

Eligible for Severance: ☐ Yes ☒ No

Date Notice Given: (mm/dd/yyyy)

Date Last Worked: (mm/dd/yyyy)

Date of Death: (mm/dd/yyyy)

Additional Employment Status Information: [Details](#)




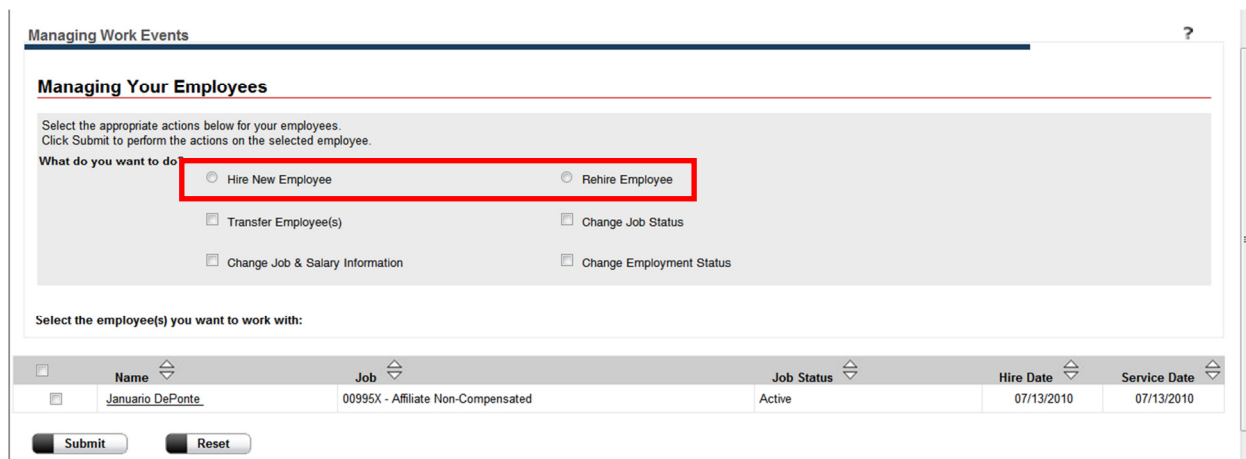
  

Figure 11 - Terminate

Initiating “Hire” and “Re-Hire”

A Hire or Re-Hire event can be initiated from the Manage Work Events home screen by clicking on the Manage Work Events link in the Organization & Staffing tab located in the manager role menu. See Figure 2 above for details. The Hire and Re Hire events have circles next to them. This indicates that you may only do one or the other, a Manager may not choose to do both. See figure 12.



Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees.
Click Submit to perform the actions on the selected employee.

What do you want to do:

☒ Hire New Employee ☐ Rehire Employee

☐ Transfer Employee(s) ☐ Change Job Status

☐ Change Job & Salary Information ☐ Change Employment Status

Select the employee(s) you want to work with:

	Name	Job	Job Status	Hire Date	Service Date
<input type="checkbox"/>	Januario DePonte	00995X - Affiliate Non-Compensated	Active	07/13/2010	07/13/2010




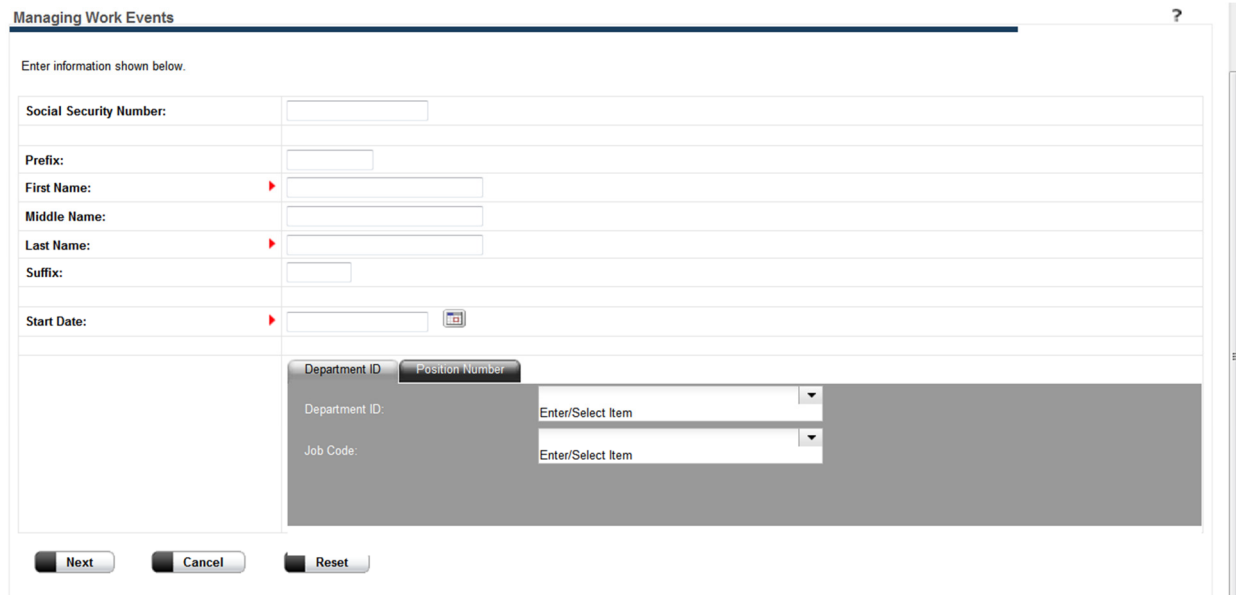
 

Figure 12 - Hire or Re-Hire Work Event


Steps for Initiating a “Hire”

1. Click on the Hire New Employee circle. See figure 12 above. Click the  button.
2. Enter required information. IE: First and Last Name, Start Date, and Department or positions. Required information is indicated by the red arrow. (Note: A manager must enter a Department or Position before they may continue, even though there is no red arrow next to the box.) Other information such as Social Security Number, Prefix, Middle Name and Suffix may also be entered at this time. See figure 13.



Managing Work Events ?

Enter information shown below.

Social Security Number:	<input type="text"/>
Prefix:	<input type="text"/>
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Suffix:	<input type="text"/>
Start Date:	<input type="text"/> 

Department ID Position Number

Department ID: Enter/Select Item

Job Code: Enter/Select Item










  

Figure 13 - New Hire

3. After all desired and required fields have been entered press the  button to proceed to the next step. If you need to go back press the  button. If the browser back button is used you will be required to re-login to portal using the portal login at www.portal.adp.com. If you would like to restart the form press the  button.
4. A series of screens will then appear allowing a Manager to enter Personal Data, Job Data, Pay Info, Citizenship info and Additional Info related to hiring a new employee. Required field are indicated by the red arrow next to the field. See figures 14-20 below. After information has been populated in each screen press the  button or press the menu item on the left side of the screen. To go back press the menu Item on the left side of the screen for the desired field. To cancel the New Hire process press the  button. To reset all fields press the  button.

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 1 of 8 Candidate Name: Jon Doe

- 1. Personal Data Part A**
2. Personal Data Part B
3. Job Data Part A
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Street:	<input type="text"/>
Apt/Suite:	<input type="text"/>
Address Line 3:	<input type="text"/>
City/Town:	<input type="text"/>
State/Province:	Select State
Postal/ZIP:	<input type="text"/>
Country:	USA
County:	<input type="text"/>
Home Phone:	<input type="text"/>

Next Cancel Reset

Trusted sites | Protected Mode: Off 125%

Figure 14 - Personal Data Part A



Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 2 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
- 2. Personal Data Part B**
3. Job Data Part A
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Race/Ethnicity	Select Race Ethnicity
Ethnic Group:	Select Ethnic Group
Gender:	Select Gender
Marital Status:	Single
Highest Education Level:	Not Indicated
Birth Date:	<input type="text"/> 
Disabled:	<input type="checkbox"/>
Military Status:	Not Indicated
Disabled Veteran:	<input type="checkbox"/>
Military Discharge Date:	<input type="text"/> 

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 15 - Personal Data Part B

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 3 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
- 3. Job Data Part A**
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Regular/Temporary:	Regular
Full/Part Time:	Full-Time
Rate Code:	Select Rate Code
Shift:	Select Shift
Work Location:	810 - Macon State College
Reporting Location:	810 - Macon State College
Holiday Schedule:	USG Holiday Schedule

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 16- Job Data Part A

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 4 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
- 4. Job Data Part B**
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Full Time Student:	<input type="checkbox"/>
Reason For Action:	Select Action Reason
Employee Classification:	Select Employee Classification
Referral Source:	Select Referral Source
Business Title:	
Security Clearance:	Select Security Clearance
Bargaining Unit:	Select Bargaining Unit
Union Code:	
Union Seniority Date:	

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 17 - Job Data Part B

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 5 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
4. Job Data Part B
- 5. Pay Info**
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Selected Job Code:	81FH03, Training Coordinator		
Salary Plan:			
Salary Grade:			
Compensation Frequency:	Annual		
Salary Step:	Select Salary Step		
Compensation:	0.00	per:	Select Frequency
Standard Hours:	40.00		
Paygroup:	<input checked="" type="checkbox"/>	Salaried	
Employment Type:	<input checked="" type="checkbox"/>	Salaried	
Variable Pay Plan:	Select Variable Pay Plan		
Split Base:	Select Split Base		
Allow Draw:	<input type="checkbox"/>		
Geographic Differential:	Select Geographic Differential		

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 18 - Pay Info

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 6 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
4. Job Data Part B
5. Pay Info
- 6. Citizenship**
7. Additional Hire Info
8. Ready To Submit

Citizenship Status:	U.S. Native		
Authorization and Identity (List A) Document:			
Authorization and Identity Document Expiration Date:			
Identity (List B) Document:			
Identity Expiration Date:			
Authorization (List C) Document:			
Authorization Expiration Date:			
Non US Country of Citizenship 1:	Select a Country		
Non US Country of Citizenship 2:	Select a Country		
Visa Type:	None - U.S. Citizen		
Visa Number:			
Visa Expiration Date:			
Passport Number:			
Passport Expiration Date:			
Country Issuing Passport:	USA		

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 19 – Citizenship

■ For amount distributions ensure that the amounts add up correctly
■ Please ensure you're using a valid Speedtype. A current list of codes (updated daily) can be found [here](#).

Earnings Distribution Fields

Step 7 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Amount (A) or Percent (P) :

Select "C" if this is a change to the Job Earnings Distribution, otherwise please **DO NOT** update this field. :

Salary Amt (when distributing by amount)
The Salary amount field **must** match the "New Salary" on the previous page. Please update or an error will occur.
(Press Cancel if you need to return to the previous screen.) :

Speedtype #1 :

Distribution #1 (Do not use \$ or % signs):

Speedtype #2 :

Distribution #2 (Do not use \$ or % signs):

Speedtype #3 :

Distribution #3 (Do not use \$ or % signs):

Speedtype #4 :

Distribution #4 (Do not use \$ or % signs):

End Date (departmental user only)
Note: Informational only - does not update : (mm/dd/yyyy)

*****End of Earnings Distribution Fields*****

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 20 - Earning Distribution Fields

- After all the information has been entered and reviewed a Manager can then add any final comments and submit the request for the new hire. See Figure 21.

Manager Home Organization & Staffing Reports

Managing Work Events

You have completed all steps for this activity. Click the Submit button to initiate the approval process for this event. You will not be able to return to prior steps once you have clicked on the submit button. If you would like to return to prior steps to review your entries, click the Previous button.

Step 8 of 8 Candidate Name: Jon Doe

Start Date: 04/01/2011
Position Number: 81000844, Training Coordinator
Department ID: 8105002000, ADP Project
Job Code: 81FH03, Training Coordinator

Comments:

Submit Previous Cancel

Done Trusted sites | Protected Mode: Off 125%

Figure 21 - Final Comments and Submit

- This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow

which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The 'Approval' activity requires an action on the part of the Manager(s), either to approve or reject the activity. When all the Approvals or Notifications have been successfully meet, than the event will be held in an area of Ev5 that allows HR to look it over before it is written to Ev5, creating the employee Record. See Figure 22.

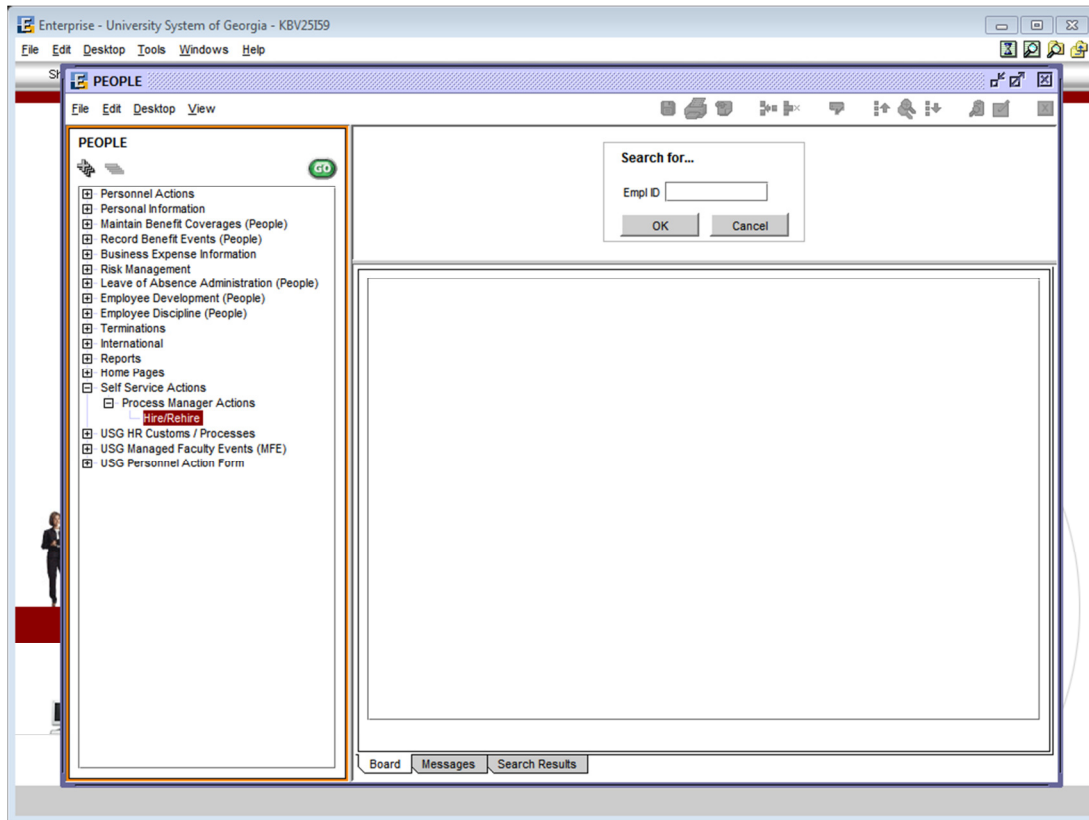


Figure 22 - Where Hire/Rehire are Held

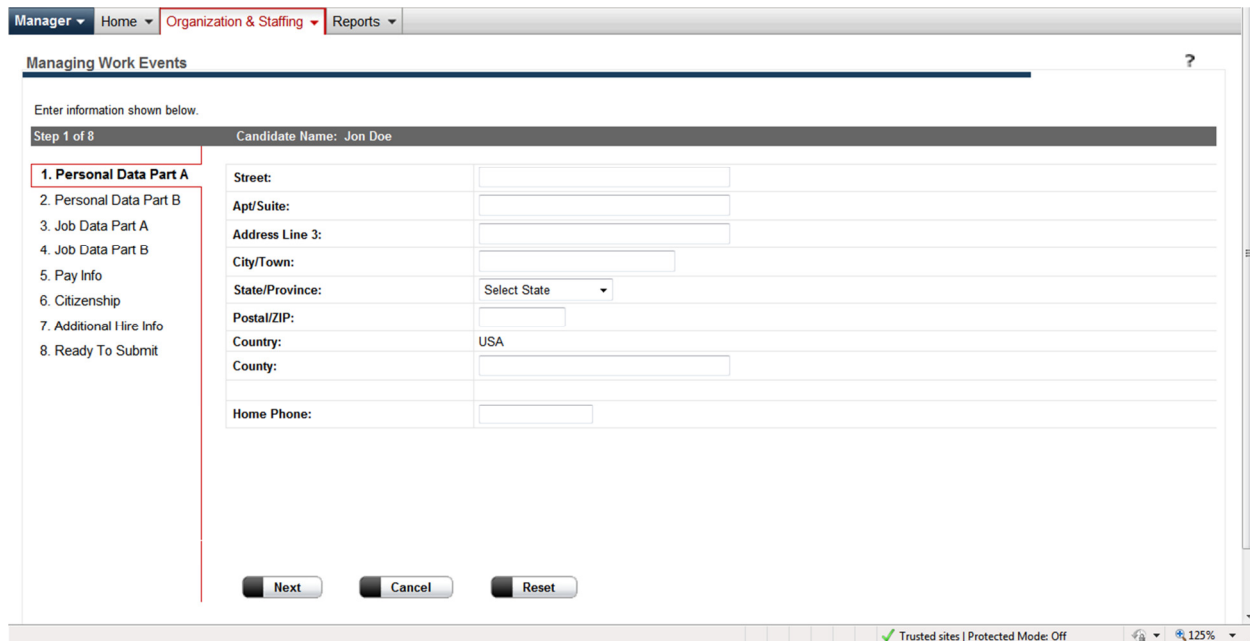
Steps for Initiating “Re-Hire”

The Re-Hire option is for person(s) that have worked for USG in the past. At the time of their termination the box that indicates if they are available for rehire must be checked.

1. Click the box next to “Re-Hire Employee”. See figure 12 above. Click on the button.
2. Search for the previous employee that is to be Re-Hired by either their Social Security Number or Previous Employee ID. Click the button to continue. To Cancel Press the button. To reset the form press the button.
3. Enter required information, Start Date and Department ID or Position Number. Required field are indicated by a red arrow. (Note: A Department ID or Position Number is a required field though there is no red arrow.) Other required information will automatically be populated with the information that was previously entered into the Employee Record, Ev5, from the previous employment at USG. After all

required and desired information has been populated in the field press the **Next** button. To Cancel Press the **Cancel** button. To reset the form press the **Reset** button.

4. A series of screens will then appear allow a Manager to enter Personal Data, Job Data, Pay Info, Citizenship info and Additional Info related to hiring a new employee. Required field are indicated by the red arrow next to the field. See figures 23-29 below. After information has been populated in each screen press the **Next** button or press the menu item on the left side of the screen. To go back press the menu Item on the left side of the screen for the desired field. To cancel the New Hire process press the **Cancel** button. To reset all fields press the **Reset** button.



The screenshot displays a web application interface for 'Managing Work Events'. At the top, there is a navigation bar with tabs: 'Manager', 'Home', 'Organization & Staffing' (which is highlighted), and 'Reports'. Below this, the main header reads 'Managing Work Events' with a help icon. The content area shows 'Enter information shown below.' and 'Step 1 of 8' with the 'Candidate Name: Jon Doe'. A sidebar on the left lists eight steps: 1. Personal Data Part A (highlighted with a red box), 2. Personal Data Part B, 3. Job Data Part A, 4. Job Data Part B, 5. Pay Info, 6. Citizenship, 7. Additional Hire Info, and 8. Ready To Submit. The main form area contains several input fields: 'Street', 'Apt/Suite', 'Address Line 3', 'City/Town', 'State/Province' (a dropdown menu showing 'Select State'), 'Postal/ZIP', 'Country' (pre-filled with 'USA'), 'County', and 'Home Phone'. At the bottom of the form are three buttons: 'Next', 'Cancel', and 'Reset'. The browser's status bar at the very bottom shows 'Trusted sites | Protected Mode: Off' and a zoom level of '125%'.

Figure 23 - Personal Data Part A

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 2 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
- 2. Personal Data Part B**
3. Job Data Part A
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Race/Ethnicity	Select Race Ethnicity
Ethnic Group:	Select Ethnic Group
Gender:	Select Gender
Marital Status:	Single
Highest Education Level:	Not Indicated
Birth Date:	<input type="text"/>
Disabled:	<input type="checkbox"/>
Military Status:	Not Indicated
Disabled Veteran:	<input type="checkbox"/>
Military Discharge Date:	<input type="text"/>

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 24 - Personal Data Part B

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 3 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
- 3. Job Data Part A**
4. Job Data Part B
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Regular/Temporary:	Regular
Full/Part Time:	Full-Time
Rate Code:	Select Rate Code
Shift:	Select Shift
Work Location:	810 - Macon State College
Reporting Location:	810 - Macon State College
Holiday Schedule:	USG Holiday Schedule

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 25- Job Data Part A


Manager ▾ Home ▾ Organization & Staffing ▾ Reports ▾

Managing Work Events

Enter information shown below.

Step 4 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
- 4. Job Data Part B**
5. Pay Info
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Full Time Student:	<input type="checkbox"/>
Reason For Action:	Select Action Reason ▾
Employee Classification:	Select Employee Classification ▾
Referral Source:	Select Referral Source ▾
Business Title:	<input type="text"/>
Security Clearance:	Select Security Clearance ▾
Bargaining Unit:	Select Bargaining Unit ▾
Union Code:	<input type="text"/>
Union Seniority Date:	<input type="text"/> 

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 26 - Job Data Part B

Manager ▾ Home ▾ Organization & Staffing ▾ Reports ▾

Managing Work Events

Enter information shown below.

Step 5 of 8 Candidate Name: Jon Doe

1. Personal Data Part A
2. Personal Data Part B
3. Job Data Part A
4. Job Data Part B
- 5. Pay Info**
6. Citizenship
7. Additional Hire Info
8. Ready To Submit

Selected Job Code:	81FH03, Training Coordinator		
Salary Plan:			
Salary Grade:			
Compensation Frequency:	Annual		
Salary Step:	Select Salary Step ▾		
Compensation:	0.00	per:	Select Frequency ▾
Standard Hours:	40.00		
Paygroup:	<input checked="" type="checkbox"/>	Salaried ▾	
Employment Type:	<input checked="" type="checkbox"/>	Salaried ▾	
Variable Pay Plan:	Select Variable Pay Plan ▾		
Split Base:	Select Split Base ▾		
Allow Draw:	<input type="checkbox"/>		
Geographic Differential:	Select Geographic Differential ▾		

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 27 - Pay Info

Manager Home Organization & Staffing Reports

Managing Work Events

Enter information shown below.

Step 6 of 8 Candidate Name: Jon Doe

- Personal Data Part A
- Personal Data Part B
- Job Data Part A
- Job Data Part B
- Pay Info
- Citizenship**
- Additional Hire Info
- Ready To Submit

Citizenship Status:	U.S. Native
Authorization and Identity (List A) Document:	
Authorization and Identity Document Expiration Date:	
Identity (List B) Document:	
Identity Expiration Date:	
Authorization (List C) Document:	
Authorization Expiration Date:	
Non US Country of Citizenship 1:	Select a Country
Non US Country of Citizenship 2:	Select a Country
Visa Type:	None - U.S. Citizen
Visa Number:	
Visa Expiration Date:	
Passport Number:	
Passport Expiration Date:	
Country Issuing Passport:	USA

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 28 – Citizenship

For amount distributions ensure that the amounts add up correctly
Please ensure you're using a valid Speedtype. A current list of codes (updated daily) can be found [here](#).

Earnings Distribution Fields

Step 7 of 8 Candidate Name: Jon Doe

- Personal Data Part A
- Personal Data Part B
- Job Data Part A
- Job Data Part B
- Pay Info
- Citizenship
- Additional Hire Info**
- Ready To Submit

Amount (A) or Percent (P)	
Select "C" if this is a change to the Job Earnings Distribution, otherwise please DO NOT update this field.	
Salary Amt (when distributing by amount) The Salary amount field must match the "New Salary" on the previous page. Please update or an error will occur. (Press Cancel if you need to return to the previous screen).	0
Speedtype #1 :	
Distribution #1 (Do not use \$ or % signs):	0
Speedtype #2 :	
Distribution #2 (Do not use \$ or % signs):	0
Speedtype #3 :	
Distribution #3 (Do not use \$ or % signs):	0
Speedtype #4 :	
Distribution #4 (Do not use \$ or % signs):	0
End Date (departmental user only) Note: Informational only - does not update	

End of Earnings Distribution Fields

Next Previous Cancel Reset

Done Trusted sites | Protected Mode: Off 125%

Figure 29 - Earning Distribution Fields

- After all the information has been entered and reviewed a Manager can then add any final comments and submit the request for the new hire. See Figure 30.

Manager ▾ Home ▾ Organization & Staffing ▾ Reports ▾

Managing Work Events

You have completed all steps for this activity. Click the Submit button to initiate the approval process for this event. You will not be able to return to prior steps once you have clicked on the submit button. If you would like to return to prior steps to review your entries, click the Previous button.

Step 8 of 8 Candidate Name: Jon Doe

Start Date:	04/01/2011
Position Number:	81000844, Training Coordinator
Department ID:	8105002000, ADP Project
Job Code:	81FH03, Training Coordinator

Comments:

Submit Previous Cancel

Done Trusted sites | Protected Mode: Off 125%

Figure 30 - Final Comments and Submit

- This will then start the process for the business rules selection. The employee will be associated with one of the business rules that have been setup, based on the logic that was used to set it up. The Work Flow which is connected to the business rule will then be started. The manager(s) in the workflow will receive either an approval or notification activity. The 'Approval' activity requires an action on the part of the Manager(s), either to approve or reject the activity. When all the Approvals or Notifications have been successfully meet, than the event will be held in an area of Ev5 that allows HR to look it over before it is written to Ev5, updating the employee record. See Figure 31.

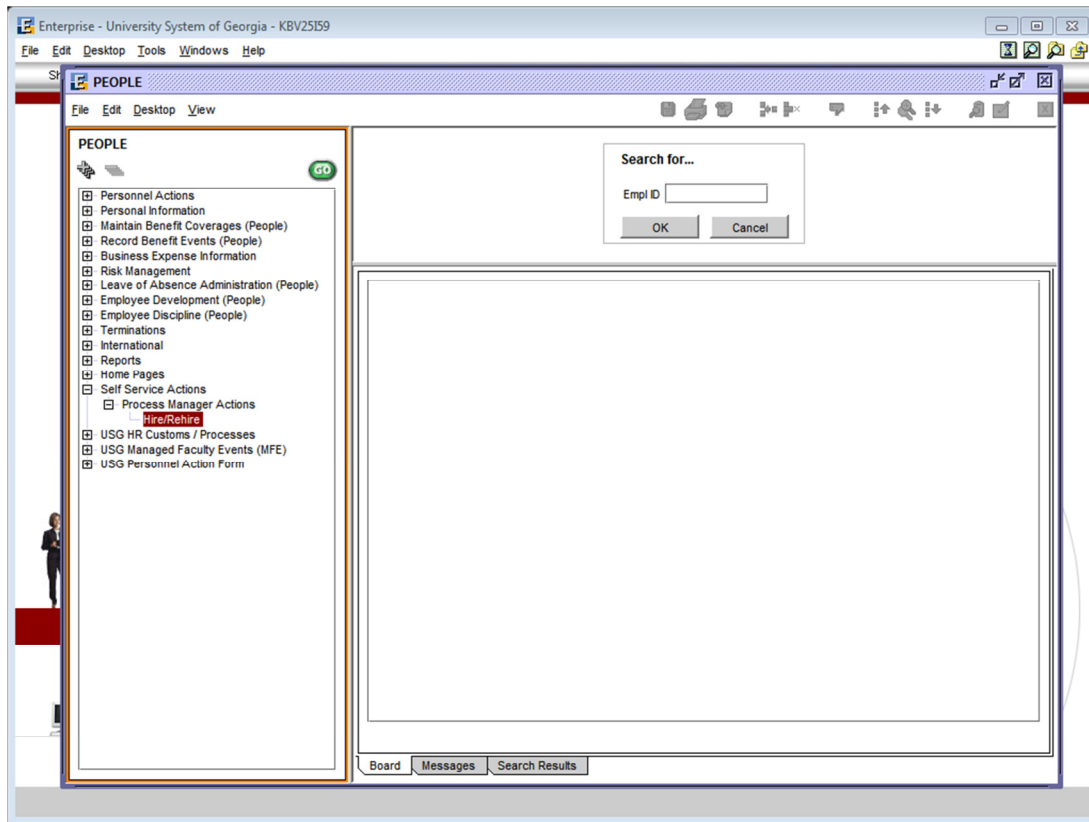


Figure 31 - Where Hire/Rehire are Held

Managing Work Event Approvals/Rejections

Managing Employee Approvals

A Manager that has been placed in a work flow either by themselves or as part of a work group may approve or reject a work event and view notifications that come across his Portal 'Desk'. This is done within the 'Manager Role' in ADP Portal. Under the 'Home' tab click on the 'Message Center' link. See figure 33.

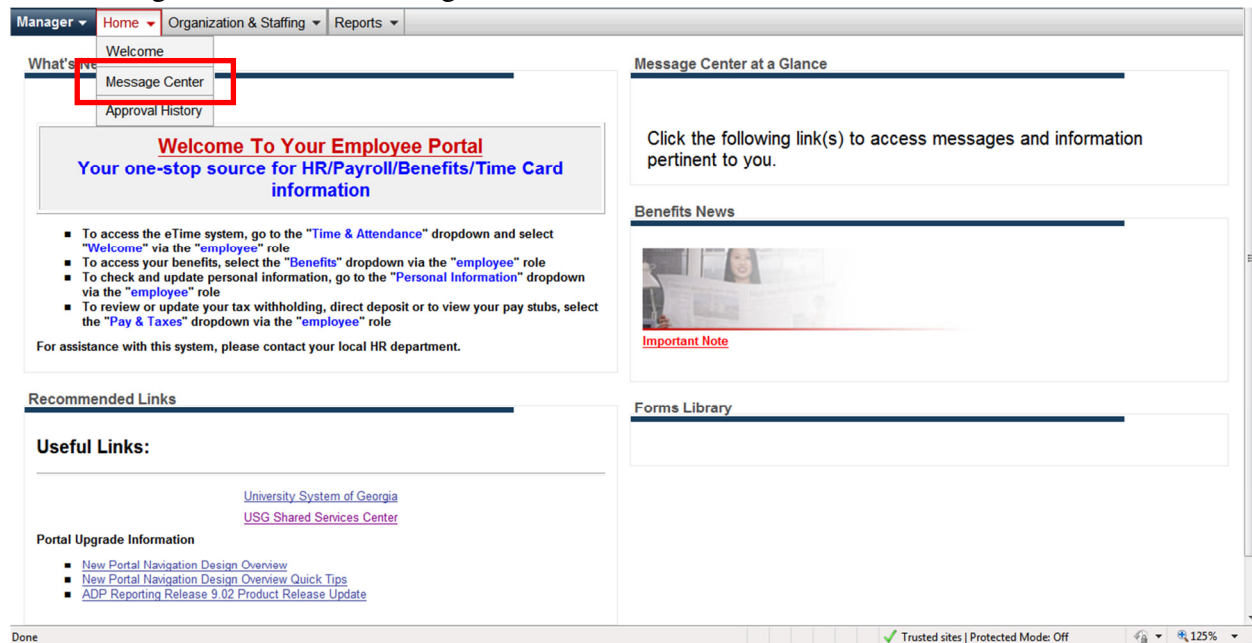


Figure 32 - Navigation to 'Message Center'

Approving Work Events

1. In the 'Message Center' welcome screen click on the approvals tab at the top of the screen under the navigation bar. (By default the approvals tab appears when entering the Message Center) See Figure 33.

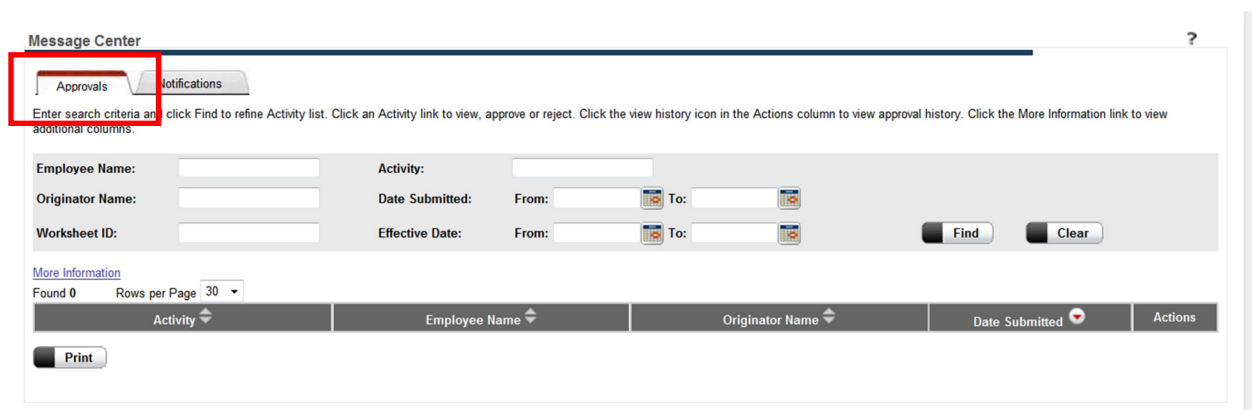
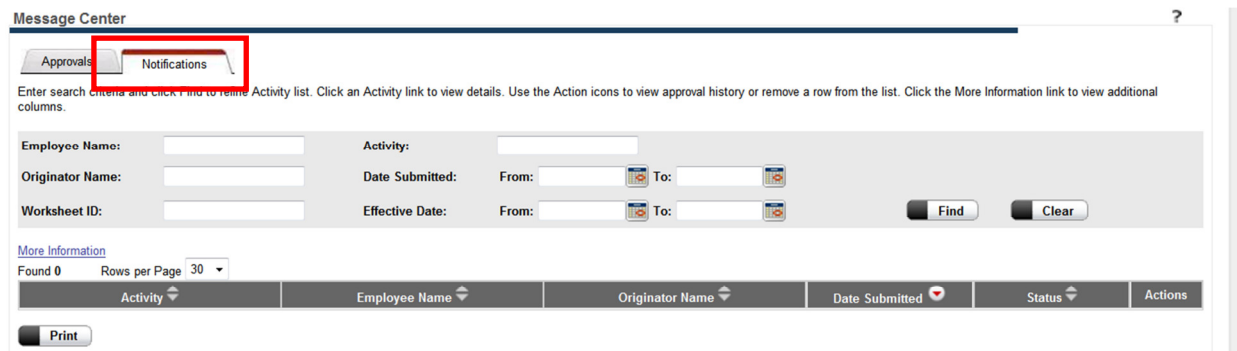


Figure 33 - Message Center Approvals Tab

2. From the approvals tab a Manager can see any events that await his/her decision. They will be able to see the Activity, Type of Work Event, the name of the Employee that will be affected by the event, the name of the Manager that initiated the event, the date that the event was submitted, and they will be able to approve or reject the event. A Manager can also click on the event in the list to receive the details of the event that the originating Manager has keyed into the system.
3. After the approval/rejection is made the event is removed from the list of Approvals. The Event is then populated in the Approval History page (see Approval/Rejection History Section in this manual for more details).

Viewing Notifications Sent by a Work Flow

1. In the 'Message Center' welcome screen click on the Notifications tab at the top of the screen under the navigation bar. (By default the approvals tab appears when entering the Message Center) See Figure 34.



Message Center

Approvals **Notifications**

Enter search criteria and click Find to refine Activity list. Click an Activity link to view details. Use the Action icons to view approval history or remove a row from the list. Click the More Information link to view additional columns.

Employee Name: Activity:

Originator Name: Date Submitted: From: To:

Worksheet ID: Effective Date: From: To:

[More Information](#)

Found 0 Rows per Page 30

Activity	Employee Name	Originator Name	Date Submitted	Status	Actions
<input type="button" value="Print"/>					

Figure 34 - Message Center Notifications Tab

2. From the Notifications tab a Manager can see any event Notifications that were sent to him/her. They will be able to see the Activity, Type of Work Event, the name of the Employee that will be affected by the event, the name of the Manager that initiated the event, the date that the event was submitted, and they will be able to approve or reject the event. A Manager can also click on the event in the list to receive the specific details about the event. All event details are not available in the notifications.
3. After viewing the notification, the notification can be removed from the list by clicking on the delete button to the right of the event in the list.

Viewing Approval/Rejections History

Viewing Event Approval/Rejection History

A Manager may view any past approvals/rejections that he/she has made. A Manager can also view any events that he/she originated. Login in as a User or Administrator (Administrator Login requires a digital certification) under the Manager Role. Click on the 'Home' tab and then the 'Approval History' link. See figure 35.

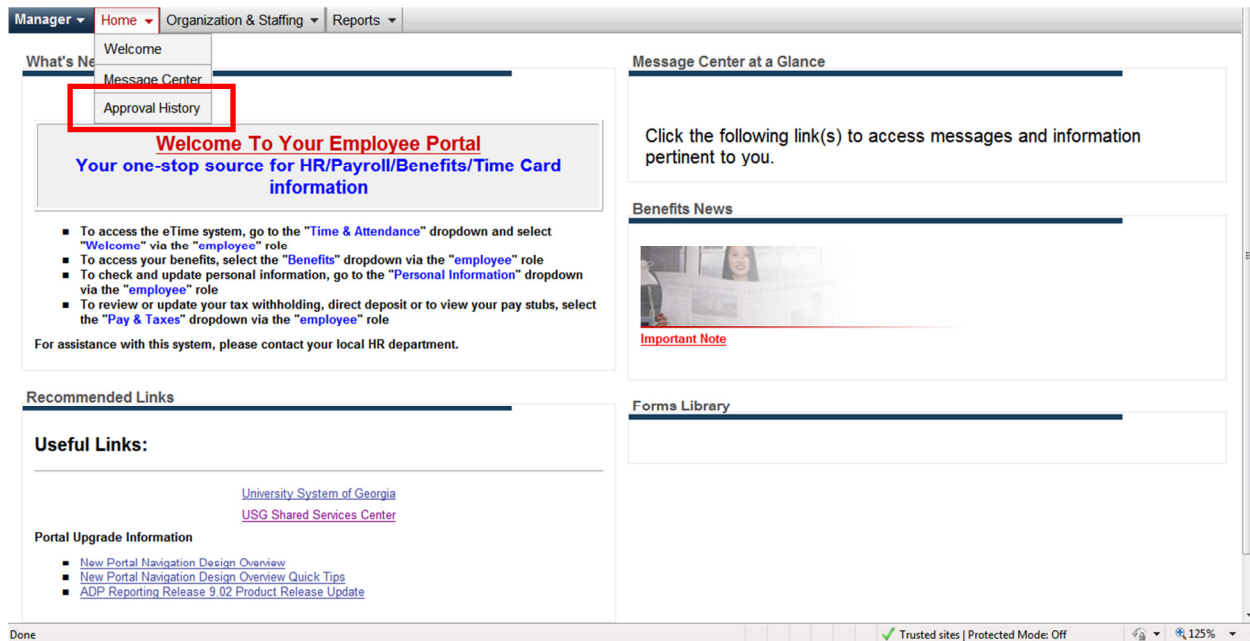


Figure 35 - Approval History

This will then bring up the 'Approval History' home screen. From this screen the Manager logged in can view a history of events that he/she has approved or rejected. The Manager is also able to see Events that originated with Him/Her. See Figure 36.

Manager Home Organization & Staffing Reports

Approval History

Enter search criteria and click Find to refine Activity list. Click the Activity hyperlink to view the details of the event. Use the Action icons to view approval history, remove a row from the list or to recall a submitted event. Click the More Information link to view additional columns.

Status: All Employee Name: Activity: Originator Name: Last Action Date: From: To: Worksheet ID: Effective Date: From: To: Find Clear

More Information Found 2 Rows per Page 30

Activity	Employee Name	Originator Name	Date Submitted	Last Action Date	Status	Actions
Work Event - New Hire	Johnson, Richard	Barth, Jeffrey	03/23/2011 10:26:09	03/26/2011 00:04:34	In Progress	
Work Event - Employment Status Change - Terminate	Williams, Clifford	Barth, Jeffrey	03/07/2011 16:14:47	03/07/2011 16:23:03	Completed	

Print

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Done Trusted sites | Protected Mode: Off 125%

Figure 36 - Approval History Home Screen

From the Approval History home screen a Manager has the ability to view work events that have been completed by clicking on the name of the activity. As well as recall a work event that has not been completed. (To edit or recall a work event that step must be taken before the first step in the work flow is completed) A Manager can also delete any completed work events from the log.

Viewing Work Events

1. Click on the completed work event activity name. See figure 37.

Manager Home Organization & Staffing Reports

Approval History

Enter search criteria and click Find to refine Activity list. Click the Activity hyperlink to view the details of the event. Use the Action icons to view approval history, remove a row from the list or to recall a submitted event. Click the More Information link to view additional columns.

Status: All Employee Name: Activity: Originator Name: Last Action Date: From: To: Worksheet ID: Effective Date: From: To: Find Clear

More Information Found 2 Rows per Page 30

Activity	Employee Name	Originator Name	Date Submitted	Last Action Date	Status	Actions
Work Event - New Hire	Johnson, Richard	Barth, Jeffrey	03/23/2011 10:26:09	03/26/2011 00:04:34	In Progress	
Work Event - Employment Status Change - Terminate	Williams, Clifford	Barth, Jeffrey	03/07/2011 16:14:47	03/07/2011 16:23:03	Completed	

Print

Figure 37 - View Completed Work Events

2. In the pop up window you can view the details of the event that completed. To close the window click on the button or the 'X' in the upper right hand corner of the window. See Figure 38.

Work Event - Employment Status Change - Terminate (Williams, Clifford)


■ Terminate

Enter the required information and click Submit to complete the action.


Termination Date:	03/07/2011
Reason for Termination:	TMP - End Temporary Employment
Eligible for Re Hire:	Yes
Eligible for Severance:	No
Date Notice Given:	
Date Last Worked:	
Date of Death:	
Additional Employment Status Information:	Details

Figure 38 - Exit Popup window

Deleting Completed Work Events in History

1. Click on the  button on the right side of the work event that you would like to delete. See figure 39.

Recalling Work Event in Progress

1. Click on the  button on the right side of the work event that you would like to recall. See figure 39.

Manager ▾ Home ▾ Organization & Staffing ▾ Reports ▾

Approval History

Enter search criteria and click Find to refine Activity list. Click the Activity hyperlink to view the details of the event. Use the Action icons to view approval history, remove a row from the list or to recall a submitted event. Click the More Information link to view additional columns.

Status:

Employee Name:

Originator Name:

Worksheet ID:

Activity:

Last Action Date: From: To:

Effective Date: From: To:

[More Information](#)

Found 2 Rows per Page 30 ▾



Activity	Employee Name	Originator Name	Date Submitted	Last Action Date	Status	Actions
Work Event - New Hire	Johnson, Richard	Barth, Jeffrey	03/23/2011 10:26:09	03/26/2011 00:04:34	In Progress	
Work Event - Employment Status Change - Terminate	Williams, Clifford	Barth, Jeffrey	03/07/2011 16:14:47	03/07/2011 16:23:03	Completed	

Figure 39

Viewing and Exporting Archived Approval History

Even though a manager/practitioner can delete an event in his/her personal approval history the events are archived for retrieval at a later date by a Practitioner.

1. Login using the Administrator login portal at www.portal.adp.com. (To login as an administrator a digital certificate is required.)

- Under the 'Practitioner Role' (Default Role when logging in to Administrator Portal), verified on the right side of menu in the role selector menu, mouse over the home tab and select 'Manage Approval History'. See figure 40.

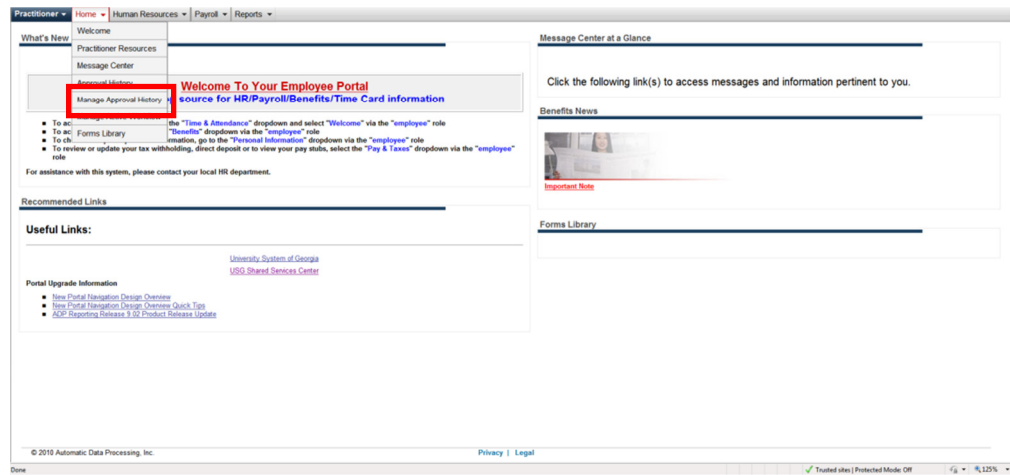


Figure 40 - Manage Approval History

- At the 'Manage Approval History' home screen a search can be performed to retrieve transactions/events both in progress or completed. The search can be done by using the follow criteria: date submitted, last action date, effective date, employee name, event name, originator name, and/or worksheet ID. As a Practitioner you may do a search using just the Date submitted, a required field, or you may choose any combination of other field to preform your search. Click on the **Find** button. You may also clear all field by clicking on the **Clear** button. See figure 41.

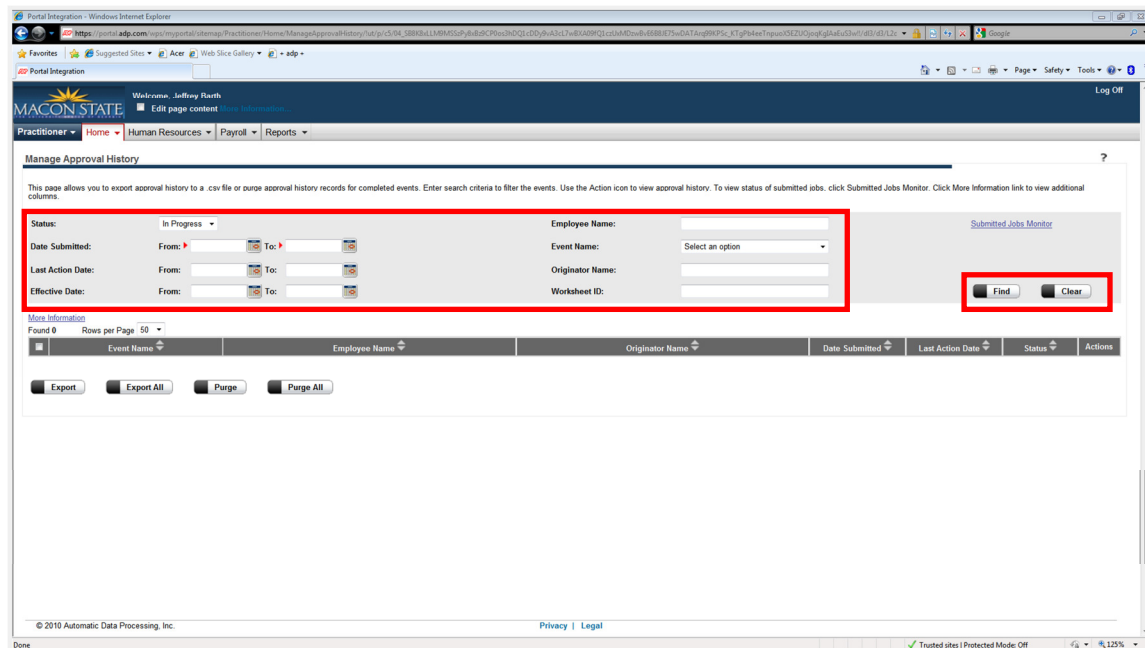


Figure 41 - Enter Fields for Search

4. The results of the search are then displayed below the title field. See Figure 42.

Manage Approval History

This page allows you to export approval history to a .csv file or purge approval history records for completed events. Enter search criteria to filter the events. Use the Action icon to view approval history. To view status of submitted jobs, click Submitted Jobs Monitor. Click More Information link to view additional columns.

Status: Completed

Date Submitted: From: 04/07/2011 To: 04/07/2011

Last Action Date: From: To:

Effective Date: From: To:

Employee Name: [Text Box]

Event Name: Select an option

Originator Name: [Text Box]

Worksheet ID: [Text Box]

Find Clear

Table Data:

Event Name	Employee Name	Originator Name	Date Submitted	Last Action Date	Status	Actions
Work Event - Employment Status Change	Anthony, Susan - 0239500	Potter, Harry - 0239499	04/07/2011 13:52:16	04/07/2011 13:53:08	Recalled	[Icon]
Work Event - Employment Status Change	Anthony, Susan - 0239500	Potter, Harry - 0239499	04/07/2011 17:48:51	04/07/2011 17:49:26	Recalled	[Icon]
Work Event - Job and Salary Change	McDonald, Ronald - 0239501	Smith, John - 0239498	04/07/2011 08:02:30	04/07/2011 08:32:10	Completed	[Icon]
Work Event - Job and Salary Change	Hancock, Herbie - 0239502	Smith, John - 0239498	04/07/2011 17:22:55	04/07/2011 17:27:56	Completed	[Icon]
Work Event - Job and Salary Change	McDonald, Ronald - 0239501	Smith, John - 0239498	04/07/2011 13:41:59	04/07/2011 13:47:14	Completed	[Icon]
Work Event - Job and Salary Change	McDonald, Ronald - 0239501	Smith, John - 0239498	04/07/2011 13:38:39	04/07/2011 13:40:19	Completed	[Icon]
Work Event - Job and Salary Change	McDonald, Ronald - 0239501	Smith, John - 0239498	04/07/2011 07:48:00	04/07/2011 07:51:20	Recalled	[Icon]
Work Event - Job and Salary Change	McDonald, Ronald - 0239501	Smith, John - 0239498	04/07/2011 17:21:32	04/07/2011 17:36:10	Completed	[Icon]

Export Export All Purge Purge All

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Figure 42 - View Results of Search



5. You may view the history of the event by clicking on the history icon, [Icon], in the actions column on the left side of the event.
6. You may also select individual events for exporting or export all events found by your search criteria.
 - a. Export Individual Events: Put a check next to each event that you desire to be exported by clicking the box, [Icon], next to the name. Then click the [Export] button on the bottom of the screen.
 - b. Export All Events: Click the [Export All] button on the bottom of the screen.
7. At the 'Download' Screen you can then download the file that was created to your hard drive for archiving by clicking on the [Download] button located after the Status in the Job row. (Processing may take up to a minute to reach a completed status. When the status changes from 'in progress' to 'completed' the screen will refresh and the [Download] will appear.) See figure 43.

Practitioner Home Human Resources Payroll Reports

Manage Approval History

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

	Creation Date	Job Process	Submitted By	Status	Records		
					Total	Completed	Failed
	04/08/2011 21:29:44	Export All	Barth, Jeffrey	Completed	8	8	0

 Delete  Back

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Done Trusted sites | Protected Mode Off 125%

Figure 43 - Download Exported File

Assigning Manager Assigned Default and Vacation Proxies

Assigning Manager Proxies

Proxies can be setup by a Manager. There are two different proxies that a Manager can assign Default and Vacation, also known as date specific. To have a vacation proxy for a pre-existing event default proxy, the default proxy must be edited. See Editing Proxies below. The proxies are setup in the portal under the Manager role. Login as a user or administrator (administrator login requires a digital certification), and click on the role selector and select Manager. Proxy Assignments can be setup and edited from the proxy assignment home screen found under Organization & Staffing tab in the menu bar. See Figure 44. (Note: If a proxy is not setup at the Manager level than the event will go to the SSC and not continue with the work flow.)

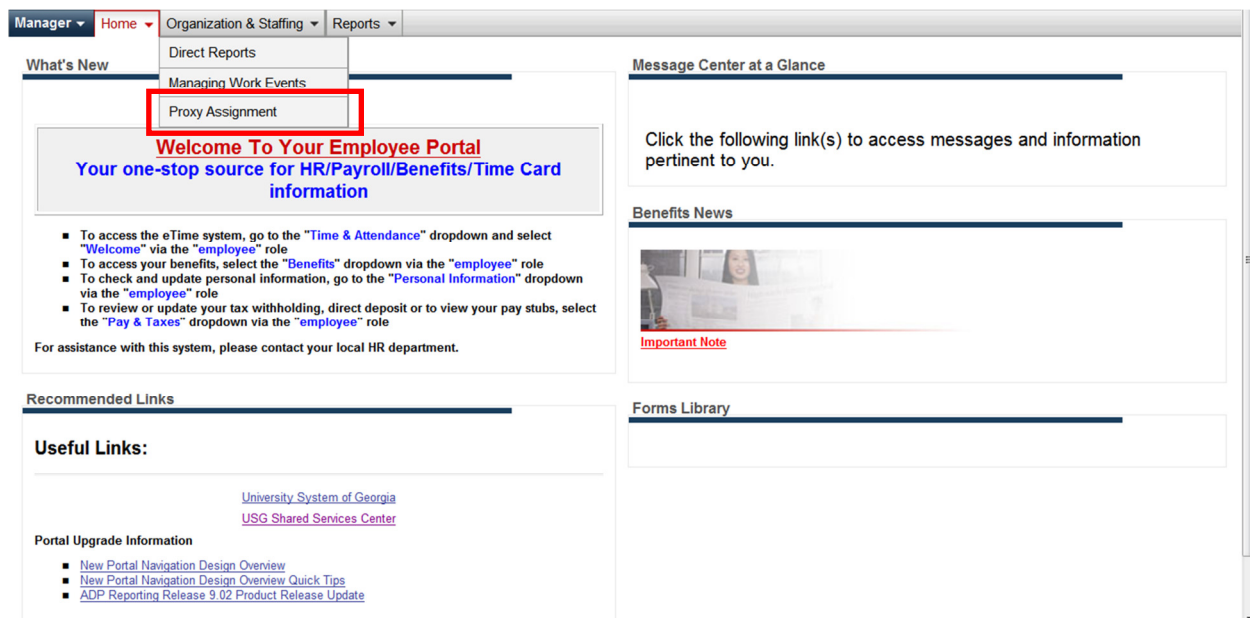



Figure 44 - Proxy Assignments

This will take you to the Proxy Assignment home screen. There you will be able to create, edit, and delete the proxies that are required by your personal responsibilities.

Adding New Proxy

1. Click on the  button in the upper right hand side of the screen. See Figure 45.

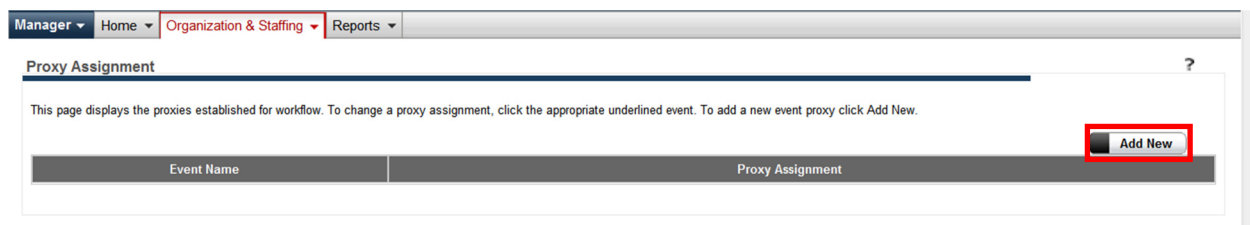


Figure 45 - Adding New Proxy

2. You are then taken to the entire form for New Proxies. From here you can select which event you would like this proxy to apply to. As well as how many days will pass before the proxy will pass this event on, in the case of a default proxy, or which specific dates in which all events will be automatically routed to the proxy, in the case of a Specific Date Proxy, or Vacation Proxy. Proxies can be assigned to a Work Group, Up to a 'reports to' Manager, maximum of 10 levels, or to a Specific Manager. See Figure 46.

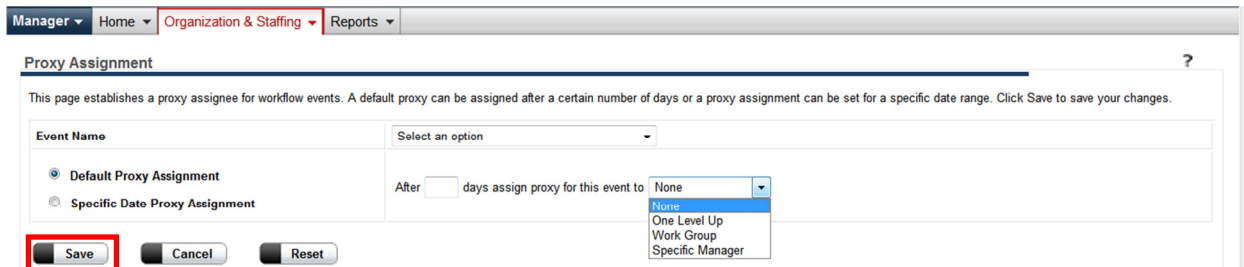


Figure 46

3. After desired information has been entered click on the **Save** button. See Figure 46 above. To cancel the proxy creation process click the **Cancel** button. To reset the proxy form click the **Reset** button.
4. The Proxy Assignment will then appear on the Proxy Assignment home screen. See Figure 47.
5. To enter additional proxies repeat steps 1-4.

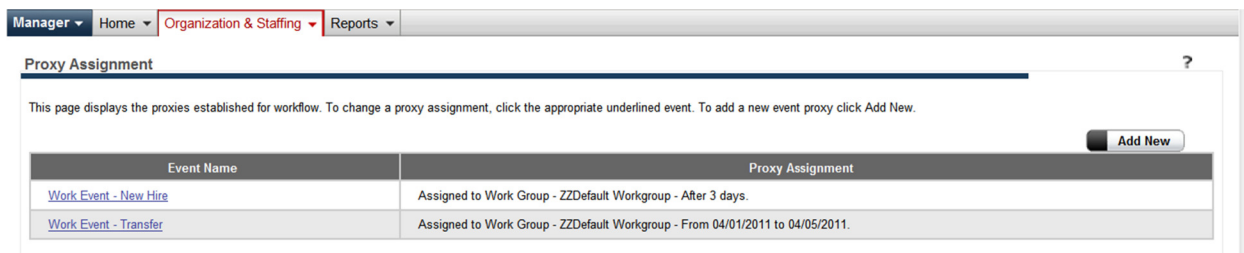


Figure 47


Edit Proxy Assignments

Proxy Assignments need to be edited if a Manager must change a default proxy or if they would like to change a Proxy from a default proxy to a Vacation Proxy.

1. Click on the Event Name of the Proxy that needs to be edited. This will then take you back into the proxy details page. See Figure 47 above. Any changes that need to be made can be made here. To change a default proxy to a vacation proxy, click on the 'Specific Date Proxy' button. This will then allow specific date to be entered where if the event occurs between those two dates it is automatically be transferred to the proxy.
2. After desired information has been entered then click on the **Save** button. See Figure 46 above. To cancel the proxy creation process click the **Cancel** button. To reset the proxy form click the **Reset** button.

Delete Proxy Assignments

To delete a Proxy Assignment a Manager must first edit the event. See Editing Proxy Assignments above.

1. Once you are in the editing proxy screen, you can delete a proxy assignment. See figure 43 above.
2. To delete the proxy click the  button. See figure 46 above.