



Version 2.057 Release Notes

07/07/2016



25B Hanover Road * Florham Park, NJ 07932
Phone: 800-343-6844 * Fax: 973-360-0699
www.unicornhro.com

Table of Contents

Version 2.057 Checklist.....	1
Overview.....	2
Manager Services Functions.....	3
New User Interface.....	3
myWorkSpace.....	6
My Employees Functions.....	7
Employee Overview Functions.....	8
Audit Report.....	9
Job Titles.....	9
Multi Browser.....	9
ACA Compliance.....	9
ACA Employment Statuses.....	9
ACA Export.....	10
ACA Stability Groups.....	10
Benefit Validation Report.....	11
Dependent Benefit Enrollment Import.....	11
EmpInfo Contact Information.....	12
EmpInfo Export.....	12
EmpInfo Pay Type Definition.....	12
EmpInfo Status Definition.....	13
On-Line Enrollment Top of Page Text.....	13
Payroll Exception Report.....	14
Time Off Request Purge.....	14
Report Distribution.....	15
Work Addresses.....	15
Work Address.....	16
Work Address Default.....	16
Work Address Import.....	17
Work Profile.....	18
Customer Management Module.....	19
Report Distribution.....	19
Payroll Express.....	20
Workflow Report Status and Copy.....	22
Workflow.....	24
Workflow Definition.....	24
Approval Path.....	37
Workflow Processing.....	45
Workflow Statistics.....	48

iCON Tools Module	50
New Year Administration	50
State Withholding Tax	50
Idaho Income Tax Withholding	50

Version 2.057 Checklist

The new features in Version 2.057 for Workflow Processing, the New UI and Report Distribution require set-up steps. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
Workflow		
Assign Function Security to the following new functions in Manager Services for applicable users. <ul style="list-style-type: none"> • Workflow Definition • Workflow Statistics 		
In File Type Security , grant access to applicable users in order to see files associated with the Transfer Employee function.		
In Work Profile , make sure all active employees have an employee number in the Reports To field in order to use workflow processing.		
In Work Relationships , define the employees who will approve workflow transactions.		
New UI		
Each user who wishes to use the new User Interface in Manager Services must go to My Account , and select the New option in the Style field. The user must then log off and then log back on in order for all of the changes to take effect. If a user does not change the Style manually, it will automatically be changed to the New Style in late August.		
Assign Function Security to the following new functions in Manager Services for applicable users. <ul style="list-style-type: none"> • Employee Overview • Employee Overview Functions 		
Report Distribution		
Assign Function Security to the Report Distribution function for applicable users.		
Work Addresses		
Assign Function Security to the following new functions in Manager Services for applicable users. <ul style="list-style-type: none"> • Work Address • Work Address Default • Work Address Import 		

Overview

Version 2.057 contains new functions as well as additional functionality throughout the product. The Release Notes contain a description of each feature in detail.

We are excited to present a significant update to the Manager Services user interface (UI). The UI is the means by which the user and a computer application interact. The new UI gives ICON an up to date look and feel that is more pleasing to the eye and makes it easier to navigate the system. Some of the new features include Menu navigation, Employee Overview, My Employee List, My Employee Functions, Job Server and Report Master Listing panels, MyWorkspace and the ability to select previous employees you worked with during your active session. See the notes below for details.

The following function will be added in the Employment Information menu in Manager Services:

- Employee Overview

The following functions will be added in the HR Setup menu in Manager Services:

- Work Address
- Work Address Default
- Work Address Import
- Workflow Definition

The following function will be added in the HR Actions menu in Manager Services:

- Workflow Statistics

The following function will be added in the Tools menu in Manager Services:

- Employee Overview Functions

The following function will be added in the Payroll menu in Manager Services:

- Report Distribution

The following section will be added to the menu bar in Manager Services:

- To Do List

Manager Services Functions

This section describes the new or changed functions in Manager Services.

New User Interface

The new user interface will be available to each user when Version 2.057 is applied to your system. Whenever you are ready to switch to the new look, go to My Account and change from Classic to New in the Style field. Submit the change and then log off of iCON and log back in to activate all of the new features. For users who do not select the change manually, the user interface will automatically change to the new look in late August. If you have any custom modification, we highly recommend you review these immediately after the release.

The home page for the New style is shown below. If you wish to work with an employee-related function, select the employee search method by clicking on the down arrow next to “Employee#”; you may search by Employee Number, Social Security Number, Last Name, First Name, Preferred Name, Report To (Last Name) or Organization.

Next, enter the employee search criteria in the SEARCH box. Click on the magnifying glass icon to begin your search. To see a list of the employees you have worked with during this session, click on the down arrow to the left of the search icon. The drop down list will display the employee number and name.



To select the function that you wish to work with, enter at least one word or partial word in the MENU SEARCH box; the system will display a list of matching functions. Click on the function with which you wish to work. You may also use the down arrow to go to the selected function. When it is highlighted,

press Enter to access the function. Or, you may click on any of the menus in the Menu Bar: Employees, Benefits, HR, Payroll, Reports or Tools. Either a submenu or a list of functions will appear. Click on the function that you wish to access.

The functions that you see in the menu are dependent on your security access. Functions that you are authorized to will be shown in alphabetical order within each of the menu areas, with the exception of the Payroll Processing menu. Functions in this menu are shown in the order in which a pay cycle is processed. At the bottom of each menu, User Defaults will appear.

Above the menu bar, the following are shown in the icon bar:



My Employee List: click on this option to display the employees that report to you. From here you may access the Overview, Demographics or Work Profile function. The Overview button will appear if you have defined functions in Employee Overview Functions.



Job Server Queue: hover over this option to see the jobs in the Job Server Queue at the time that it was last refreshed. When you submit a job, a counter will appear. If the count is red, the job is waiting. If it is gold, the job is in process. If it is green, the last job is finished. If you hover over the icon, the count will no longer be displayed. You may click Refresh in the Job Server Queue to see the latest jobs.



Reports: hover over this option to display a list of the reports and files in Report Master Listing at the time that it was last refreshed. This will bring you to the same listing as when you select Report Master Listing from the Tools menu. When a new report is generated, a counter will appear in green. If you hover over the icon, the count will no longer be displayed. You may click Refresh in the Report Master Listing to see the latest reports.



To Do List: click on this option to display workflow transactions in which you are involved. The system will default to showing the pending transactions that are awaiting your review and approval. You may change the selection to see workflows that have been approved or rejected or are in process.



HCA Reporting: if Human Capital Analytics metrics have been defined, click on this option to display dashboard charts.



WebReportHR: if you have access to the adhoc report writer, click on this option to open a separate window with the list of reports you have created.



Compliance Corner: click on this option to display BNA's Compliance Corner where you can search for information related to benefits, human resources and payroll.

Above the icon bar, the following are shown in the session bar:



Notifications: click on this option to view notifications that have been sent to you.



Help: this section will display information about the area of Manager Services from which it is accessed. If you go to another function while the Help window is open, click on Refresh in the Help window to display help text applicable to that function. The following are also available from the Help menu bar:

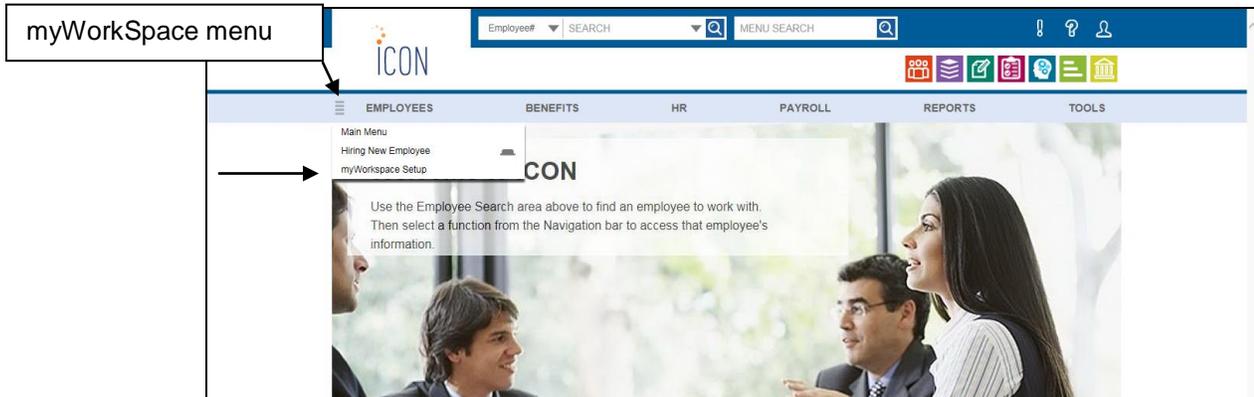
- **Documents:** This section gives you access to documents that describe various areas of the system. They are grouped in the following areas: Benefits, Human Resources, Payroll, Product Manuals, Release Notes and Tools.
- **How To:** This section shows a list of frequently asked questions about procedures in iCON.
- **Outsource Forms:** If you have outsourced your payroll processing to Unicorn HRO, use this section to access commonly-used forms. They are shown as fill-in PDF forms which may then be e-mailed to Pay Support.
- **COD:** This displays a list of all Common Objects. Help for any common object may be accessed here. Help for a particular common object may also be accessed from within the Common Object Dictionary function.
- **Index:** This displays a list of all Help topics. Help for any function may be accessed here, in addition to accessing it from the function itself.



My Account: you may change information such as your password, password recovery question and answer, your e-mail address and your default home page setting. You may also log off the system using this icon.

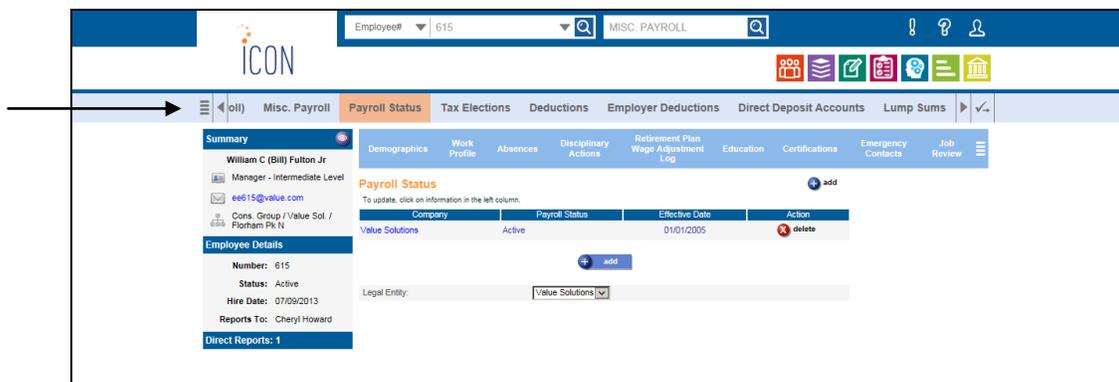
myWorkspace

If you wish to group selected functions together, thereby creating your own menu entry, click on the 4 horizontal bars to the left of the menu bar to access the myWorkspace menu. Then click on myWorkspace Setup. See the Help document called Workspace Setup for full instructions. The myWorkspace Menu will also display previously defined Workspaces. In the following example, the user has defined a Workspace called Hiring New Employee.



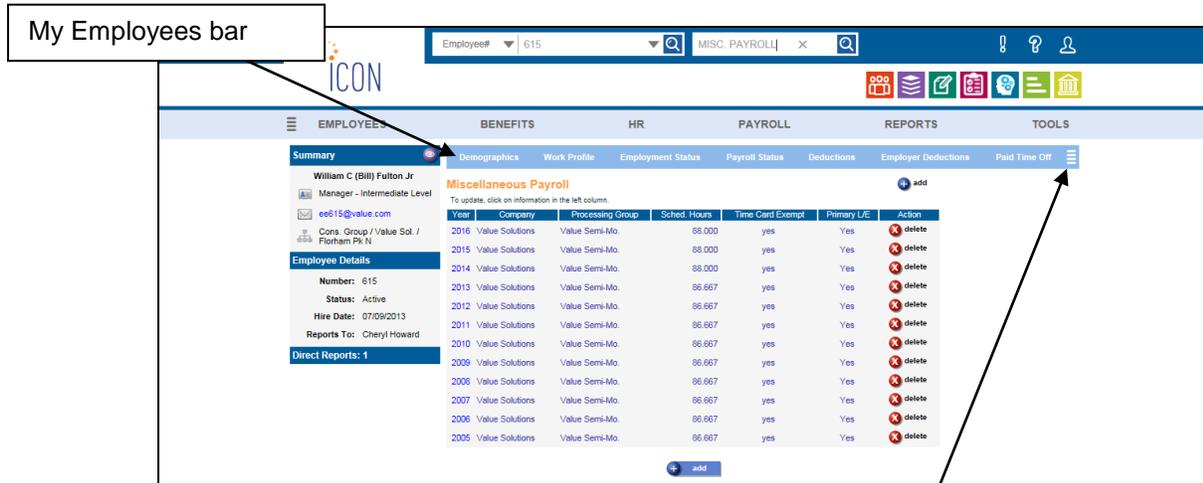
If you access a Workspace, the MyWorkspace bar will appear in place of the Main Menu. You may click on the left arrow to scroll left, or the right arrow to scroll right. At the right of the MyWorkspace bar is a checkmark; click on this to advance to the next function.

To return to the main menu, put your mouse pointer over the four horizontal bars at the left of the MyWorkspace bar; click on Main Menu at the top of the list.



My Employees Functions

If you wish to show a list of commonly used functions beneath the main menu bar when you are accessing an employee-related function, you may define them in **My Employees Functions**. By doing so, the functions will be shown as links in the My Employees bar; you may click on any of these to quickly access that function. In this example, the user has set up **Demographics**, **Work Profile**, **Employment Status**, etc.



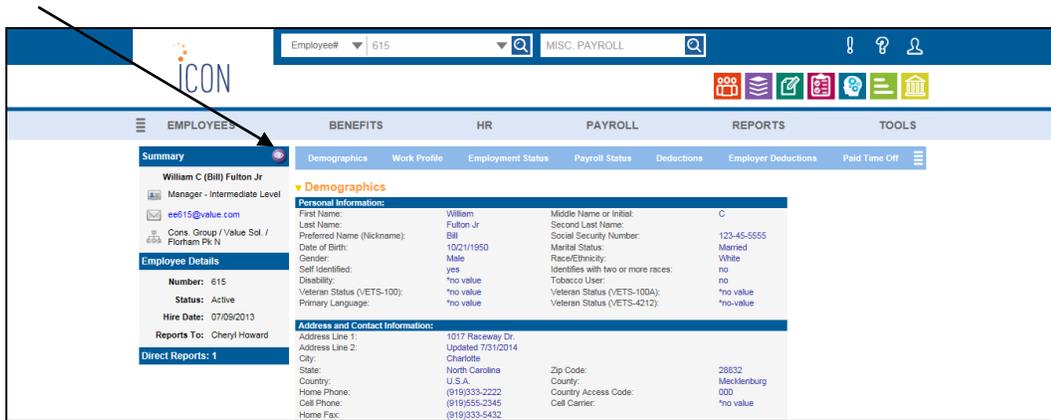
If you have selected more functions than can fit on the My Employees bar, four horizontal lines will appear on the right of the bar; put your mouse pointer over this area to access the remaining functions.

Employee Overview Functions

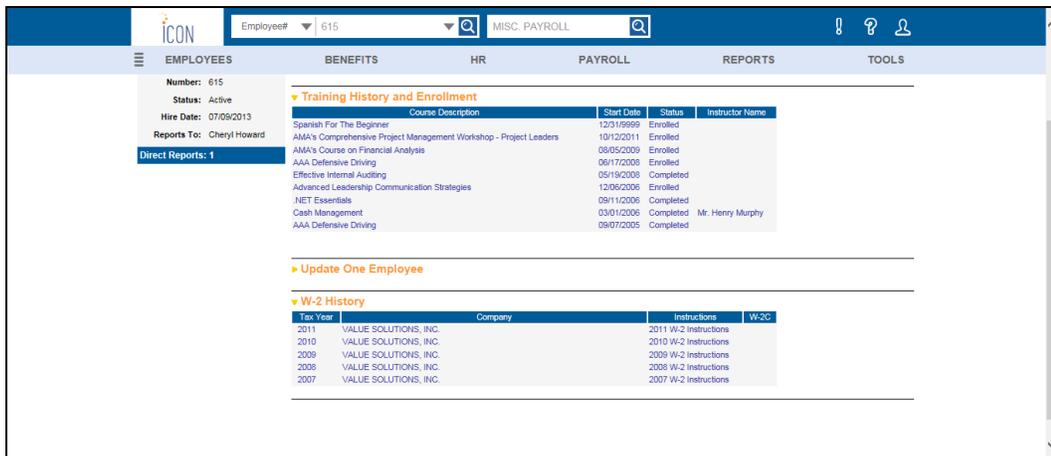
Another way to quickly view commonly-used employee functions is to set them up in Employee Overview Functions, which is a new feature in Version 2.057. The following two new functions are included in this update:

- **Employee Overview**
- **Employee Overview Functions**

In **Employee Overview Functions**, select up to four functions. This will cause the Employee Overview icon to appear in the Summary section of the side bar. When you click on this icon, the main page of each of the functions you selected will be shown as view only. You may click on any of the function names to go directly to that function. In this example, **Demographics** is the first function. You may click on the down arrow to the left of the function name to hide the details; a right arrow will then display, which you may click to show the details.



The last three functions in this example are **Training History and Enrollment**, **Update One Employee** (where the user has hidden the details) and **W-2 History**:



Audit Report

The ability to report on changes to **Garnishment Payees** has been added.

Job Titles

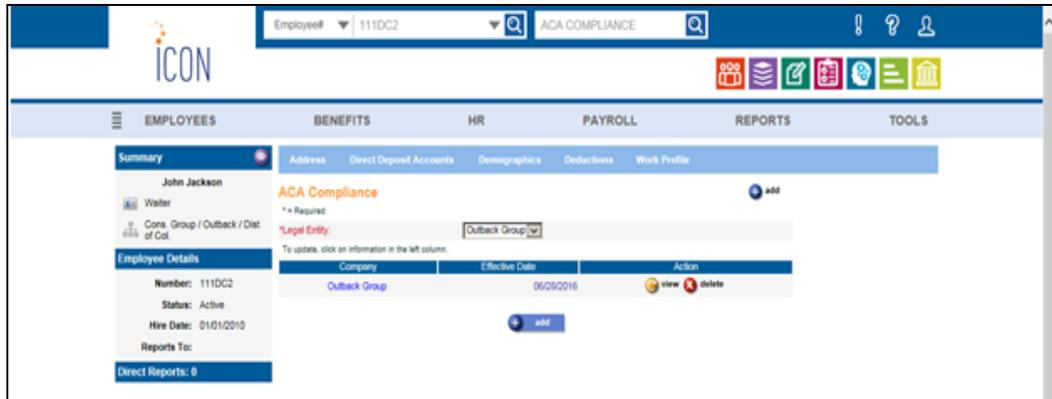
When a large amount of job titles existed, the search function did not work correctly and users had to page to the job title to be updated. This issue has been corrected.

Multi Browser

We have implemented multi browser changes for thirteen functions. The changes ensured the page design and functionality is the same in all supported browsers. The function list along with an IE screenshot are shown below.

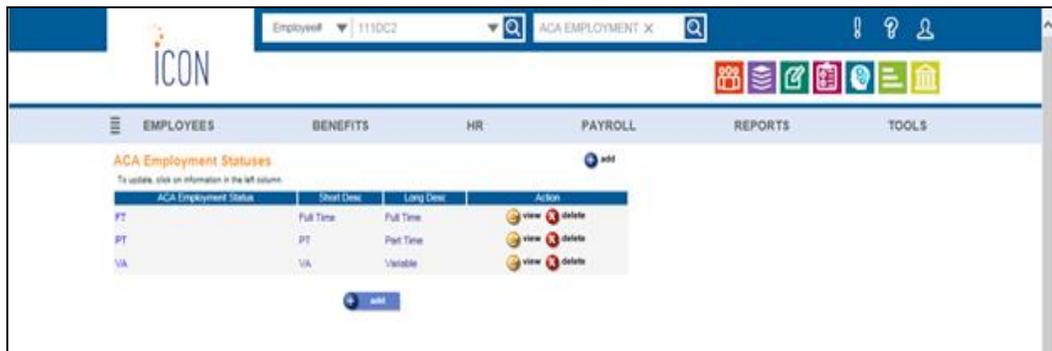
ACA Compliance

If you have purchased the ACA module, use this function to record, track, and maintain information for the employee related to the Affordable Care Act (ACA).



ACA Employment Statuses

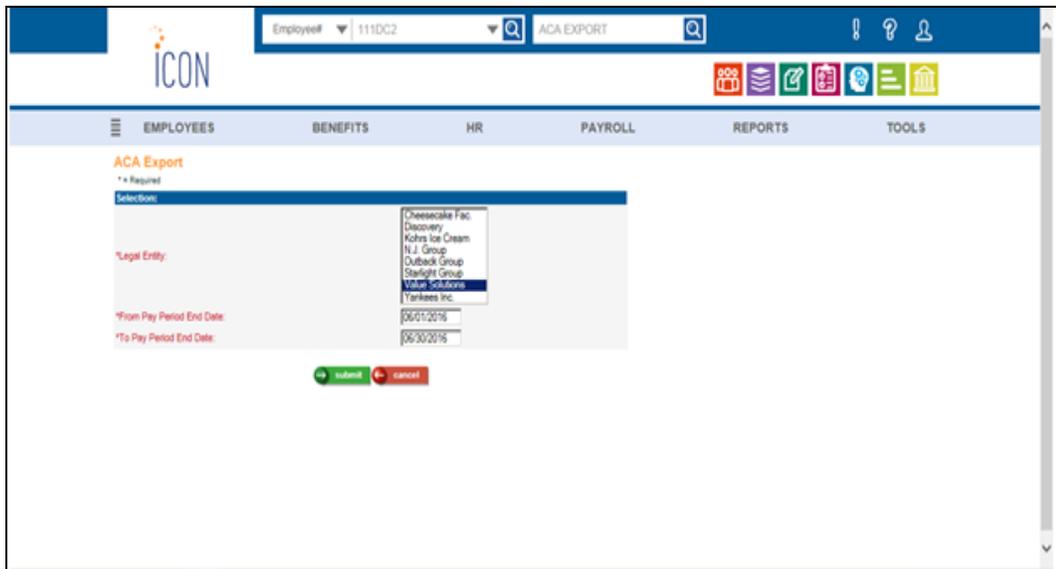
If you have purchased the ACA services, use this function to define the valid employment statuses that employees may have for purposes of the Affordable Care Act (ACA).



ACA Export

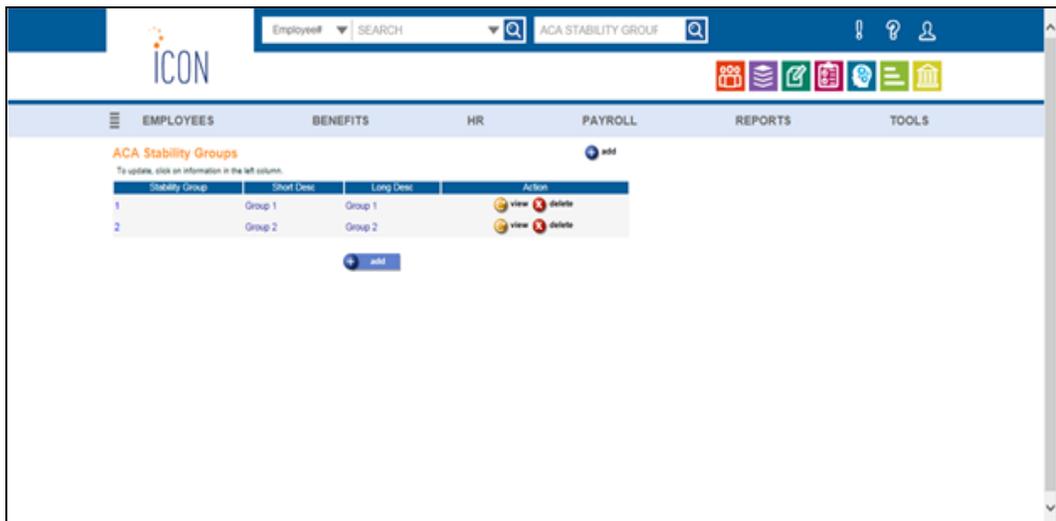
If you have purchased the ACA module, if you use the Affordable Care Act (ACA) module, this function may be used to create the following export files:

- DEM: demographics information about employees
- ECP: employee custom properties
- HEI: organization hierarchy
- PAY: employee payment data



ACA Stability Groups

If you have purchased the ACA module, use this function to record, track, and maintain measurement or stability groups.



Benefit Validation Report

Use this function to create a CSV file containing deduction information for benefits, flexible spending accounts and/or health savings accounts.

The screenshot shows the 'Benefit Validation Report' form in the iCON system. The top navigation bar includes 'EMPLOYEES', 'BENEFITS', 'HR', 'PAYROLL', 'REPORTS', and 'TOOLS'. The main form area contains the following fields and options:

- Organization:** A dropdown menu with 'Cons. Group / Value Sol.' selected.
- As Of Date:** A date field with '07/01/2016' entered.
- Deduction Code:** Radio buttons for 'All' and 'Selected'. A list of codes is shown below: 421 06 Prior, 421 09 Prior, 4203 10 Health Exp, 4203 11 Loan, 4203 12 Plan, 421 06 Prior, 423 06 Prior.
- Report Name:** A text field with 'BenefitValidationReport' entered.

Below these fields, there are instructions: 'Click on each tab to select the information to be included in the report. When you have entered all information, click on the Submit button.' There are three tabs: 'Benefits', 'Flexible Spending Accounts', and 'Health Savings Accounts'. Under the 'Benefits' tab, there are three columns of radio buttons for selection:

Select Benefits	Benefit Categories	Benefit Plans
<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None
<input type="radio"/> All	<input type="radio"/> All	<input type="radio"/> All
<input type="radio"/> Select	<input type="radio"/> Select	<input type="radio"/> Select

Dependent Benefit Enrollment Import

Use this function to upload a file containing dependent benefit information into the **Benefit Enrollment** and **Benefit History** functions. This will create dependent benefit enrollment records, as well as dependent benefit history records.

The screenshot shows the 'Dependent Benefit Enrollment Import' form in the iCON system. The top navigation bar includes 'EMPLOYEES', 'BENEFITS', 'HR', 'PAYROLL', 'REPORTS', and 'TOOLS'. The main form area contains the following elements:

- File Name:** A text input field with a 'Browse...' button next to it.
- Instructions:** A note stating 'The File Name must contain your Customer Number and be in .csv format'.
- Submit Button:** A green button with a right-pointing arrow and the text 'Submit'.

EmpInfo Contact Information

If you are using the EmpInfo module, this function is used to store information about the person who should be contacted in case of a question regarding the EmpInfo process.

The screenshot shows the 'EmpInfo Contact Information' form in the iCON system. The page header includes the iCON logo, a search bar with 'Employee# 111DC2', and a search bar with 'EMPINFO CONTACT IN'. The navigation menu includes EMPLOYEES, BENEFITS, HR, PAYROLL, REPORTS, and TOOLS. The form fields are as follows:

First Name:	Susan	Last Name:	Jackson
Email:	sjackson@icon.conro.com	Extension:	
Phone#:	(973) 555-0999		
Fax#:	(973) 555-9999		

A 'submit' button is located at the bottom of the form.

EmpInfo Export

If you are using the EmpInfo module, this function exports the file required by EmpInfo.

The screenshot shows the 'EmpInfo Export' form in the iCON system. The page header includes the iCON logo, a search bar with 'Employee# 111DC2', and a search bar with 'EMPINFO EXPORT'. The navigation menu includes EMPLOYEES, BENEFITS, HR, PAYROLL, REPORTS, and TOOLS. The form has a 'File Name' field containing 'EmpInfoFile'. Below the field are 'submit' and 'cancel' buttons.

EmpInfo Pay Type Definition

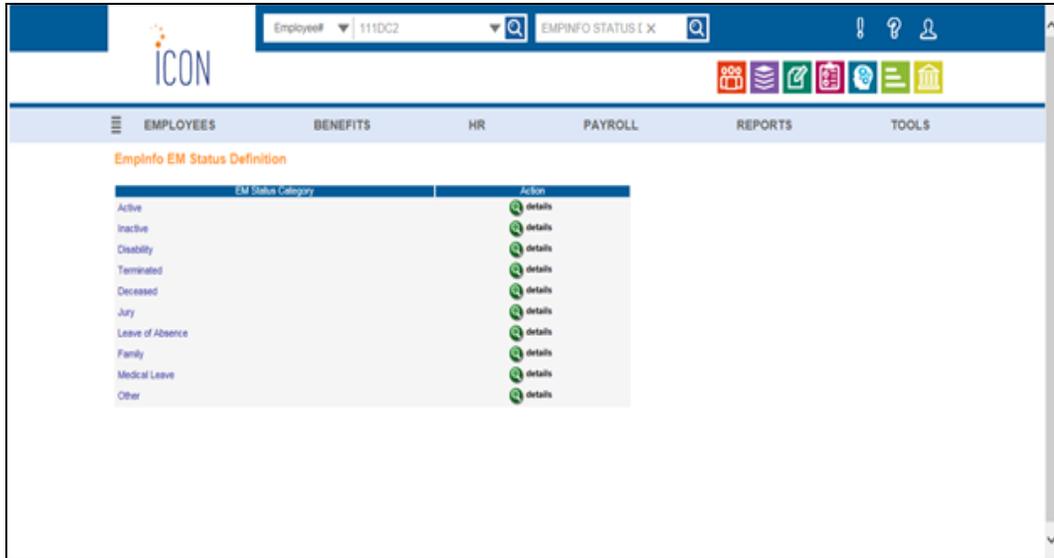
If you are using the EmpInfo module, this function is used to define the pay types that are in each of the Pay Categories.

The screenshot shows the 'EmpInfo Pay Type Definition' table in the iCON system. The table has two columns: 'Pay Category' and 'Action'. Each row represents a pay category with a corresponding 'details' action link.

Pay Category	Action
Base Pay	details
Overtime Pay	details
Bonus	details
Commissions	details
Stocks	details
Other Pay	details

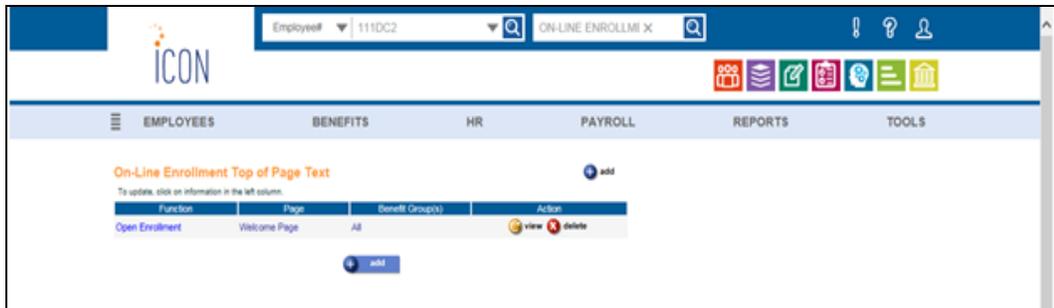
EmpInfo Status Definition

If you are using the EmpInfo module, this function is used to define the employment statuses that are in each of the Status Categories.



On-Line Enrollment Top of Page Text

This function allows you to provide employees with additional information and instructions when they access **First Time Enrollment**, **Open Enrollment**, **Life Events** or **Voluntary Benefits Enrollment** in Employee Self Service. You have the ability to replace the first paragraph on any of the many pages.



Payroll Exception Report

This report prints employees with an active Payroll Status whose Scheduled Hours in Misc. Payroll do not equal Annual Hours divided by the Number of Pay Periods from the Pay Frequency common object. The report includes:

- legal entity
- payroll processing group
- as of date
- employee number
- employee name
- pay frequency
- scheduled hours in Misc. Payroll
- annual hours divided by number of pay periods

The screenshot shows the iCON web interface for the 'Payroll Exception Report'. The top navigation bar includes 'EMPLOYEES', 'BENEFITS', 'HR', 'PAYROLL', 'REPORTS', and 'TOOLS'. The main content area displays the report title and a form with the following fields:

- Legal Entity:** Value Solutions (dropdown)
- Payroll Processing Group:** No value (dropdown)
- As of Date:** 01/01/2016 (text input)
- Report ID:** PayrollExceptionReport (text input)

At the bottom of the form are 'submit' and 'cancel' buttons.

Time Off Request Purge

This function is used to purge data that employees have entered in Employee Self Service in the **Time Off Request** function. Once purged, this data will no longer be available in **Review Time Off Request**. This function can be used as a data maintenance tool to purge old records that will no longer be used.

The screenshot shows the iCON web interface for the 'Time Off Request Purge' function. The top navigation bar includes 'EMPLOYEES', 'BENEFITS', 'HR', 'PAYROLL', 'REPORTS', and 'TOOLS'. The main content area displays the report title and a form with the following fields:

- Select Employee Population:** A list of states including Vermont, Virginia, W. Virginia, Washington, Wisconsin, Wyoming, and an 'Overland' section with sub-items for Pennsylvania, Shriver's, Star Archive, Starlight, and Value Sol.
- Selected Levels:** Com. Group / Value Sol.
- From:** 06/01/2016 (calendar icon)
- To:** 06/30/2016 (calendar icon)
- Status:**
 - Open:
 - Approved:
 - Denied:

At the bottom of the form are 'submit' and 'cancel' buttons.

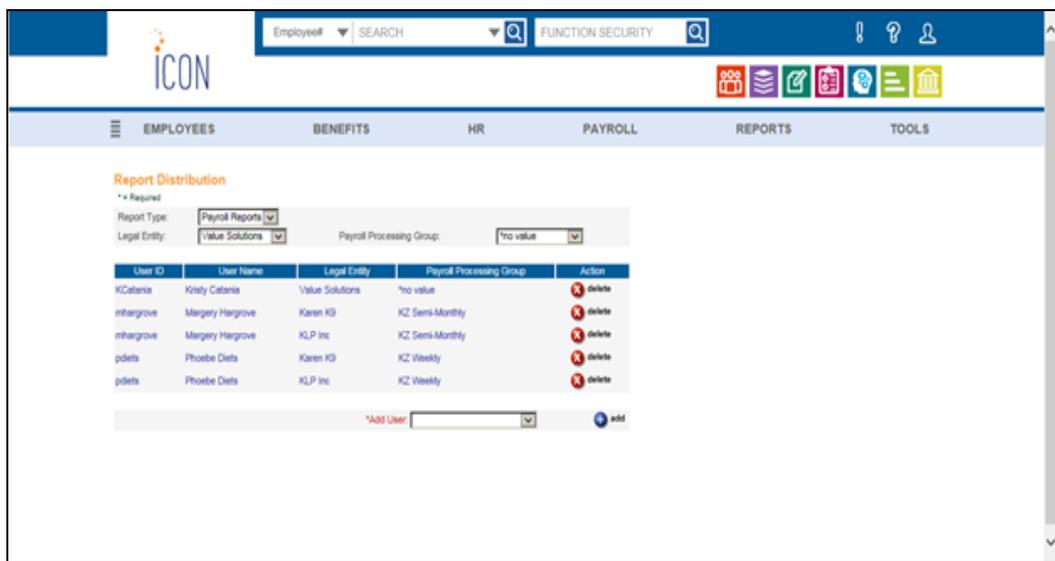
Report Distribution

This function can be used to place output reports in the Report Master Listing.

Report Type field is hard coded for “Payroll Reports”.

Select a Legal Entity and Payroll Processing Group from the drop down list, if applicable. If these fields are blank, then the user will receive payroll workflow files for all options listed.

Select a user from the drop down list and click on the Add button.



Work Addresses

Three Work Address functions will be added to the system. These functions have been designed to give you the ability to record the work locations for each of your employees. If you have multiple locations, this will be a helpful tool to determine which withholding taxes are required. Additionally, in the near future we are looking to implement a W-4 Form enhancement which will require an employee’s work location to be available in iCON. This will allow iCON to determine which W-4 Form(s) are required for a specific employee based on their resident and work addresses. A default work address can be specified, such as the legal entity address or an organization level’s address; if a default is set up, any Work Address that is stored in **Work Profile** will be used as an override.

Work Address

This function is used to set up work addresses. These work addresses will be shown in the **Work Profile** function in a new field called Work Address.

EMPLOYEES				BENEFITS				HR				PAYROLL			
Work Address												+ add			
To update, click on information in the left column.															
Work Address Code		Description				Address				Action					
ADD2		Morristown NJ				123 South St Morristown, NJ 07960				view delete					
KOHR-CAPEMAY		Kohr's Cape May NJ				103 Ocean Dr. Cape May, NJ 08228-1234				view delete					
KOHR-OCEANCITY		Kohr's Ocean City NJ				204 Boardwalk Ocean City, NJ 08222				view delete					
KOHR-SEASIDEPARK		Kohr's Seaside Park NJ				305 Ocean Ave. Seaside Park, NJ 08229-2575				view delete					

Work Address Default

If you already store work addresses on your system, you may select a work address default. By so doing, you do not need to enter them in the **Work Address** function, or select them for each employee in **Work Profile**. If you select a work address default, you may still enter “override” addresses in **Work Address** for specific situations, and then associate them with employees in **Work Profile**. In this example, Organization Level 3 is selected as the default work address:

EMPLOYEES		BENEFITS		HR	
Work Address Default					
Work Address Default:				Organization Level 3	
→ submit		← cancel			

Here are the selections in the Work Address Default field for an organization that has a Check Address and Mailing Address in the Address Types common object:

- *no value
- Legal Entity
- Organization Levels**
- Organization Level 1
- Organization Level 2
- Organization Level 3
- Organization Level 4
- Organization Level 5
- Organization Level 6
- Organization Level 7
- Address Types**
- Check
- Mailing

Work Address Import

Use this function to import records into the **Work Address** function. The file must be in csv format and the file name must contain your customer number. The file must contain one header row. Enter the field names in the header row, separated by a comma. You must enter at least all mandatory fields: Work Address, Work Address Desc, Effective Date, Address Line 1, City, State, Zip and Country. If the State is Pennsylvania, the Subdivision field is also mandatory. The valid column headings are:

Work Address	Work Address Desc
Effective Date	Active
Address Line 1	Address Line 2
Address Line 3	City
State	Zip
Phone#	CellPhone#
CellCarrier	Fax#
Alt Phone Type 1	Alt Phone 1
Alt Phone Type 2	Alt Phone 2
Alt Phone Type 3	Alt Phone 3
Alt Phone Type 4	Alt Phone 4
Alt Phone Type 5	Alt Phone 5
Country#	County
Country	Verbal
Subdivision	

Valid values for the Active column are Y and N. If no value is specified, the system will default the Active field to Y. If no Effective Date is specified, the system will default the field to today's date.

Work Address Import

* = Required

*File Name: Browse...

The File Name must contain your Customer Number and be in .csv format

Work Profile

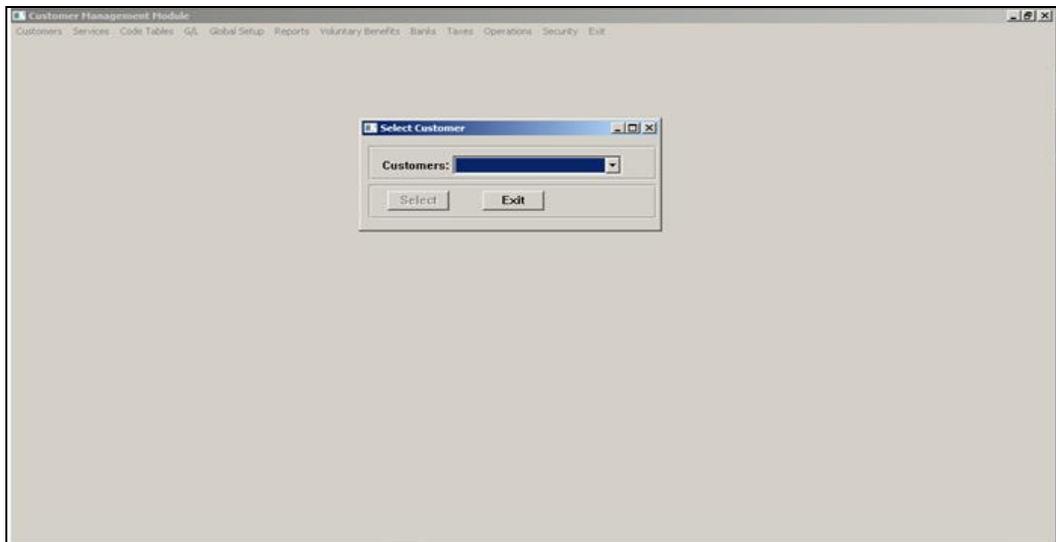
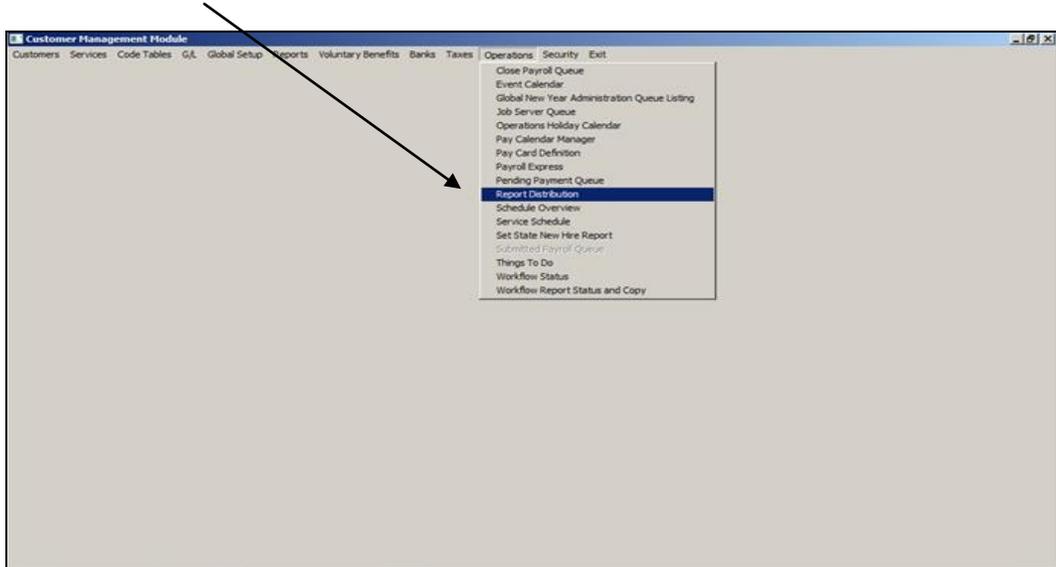
In order to associate a work address with an employee if the default work address has not been set up or does not apply, a field called Work Address has been added to the **Work Profile** function. In this drop down list, the Work Address Descriptions for all active Work Address records will be shown.

EMPLOYEES	BENEFITS	HR	PAYROLL	REPORTS	TOOLS
Summary					
William C. (Bill) Fulton Jr Manager - Intermediate Level ee615@value.com Cons. Group / Value Sol. / Florham Pk N					
Employee Details					
Number: 615 Status: Active Hire Date: 07/09/2013 Reports To: Cheryl Howard					
Direct Reports: 1					
Update Work Profile * = Required					
Position Data:					
*Original Hire Date:		01/02/1997	*Adjusted (Rehire) Date:		07/09/2013
Acquisition Date:			Last Paid Date:		10/15/2013
Seniority Date:			Projected Retirement Date:		10/21/2016
To modify the Organization and Job Title use the Transfer Employee function.					
*Organization:		Florham Pk N	*Job Title:		Manager - Intermediate Level
Work Address:		<input type="text" value="Value-Florham Park, NJ"/>			
Business Title:		<input type="text"/>			
Reports To:		601	Supervisor Name:		Cheryl Howard
To modify the status use the Employment Status function.					
*Status:		Active	*Status Date:		01/02/1997
*Status Reason:		New Hire	Security Class:		no value

Customer Management Module

Report Distribution

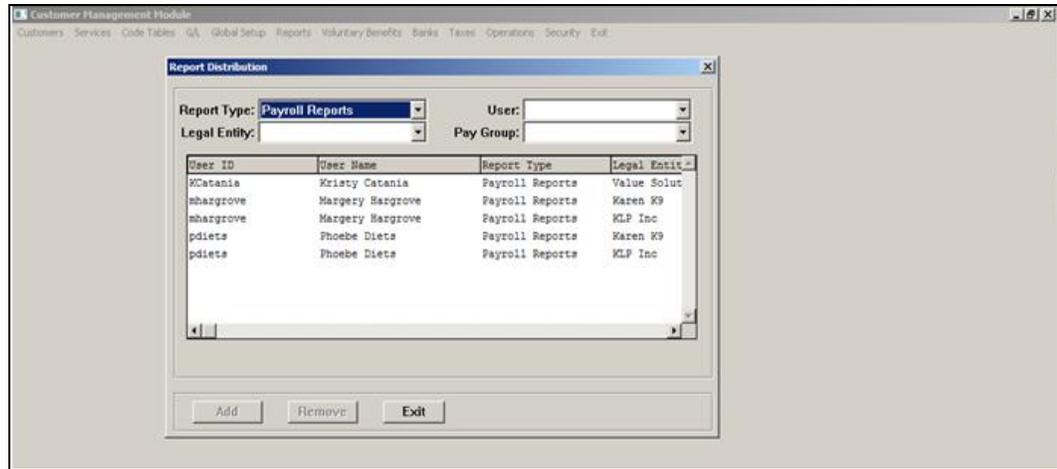
This function can be used to place output reports in the **Report Master Listing**.



Report Type field is hard coded for “Payroll Reports”.

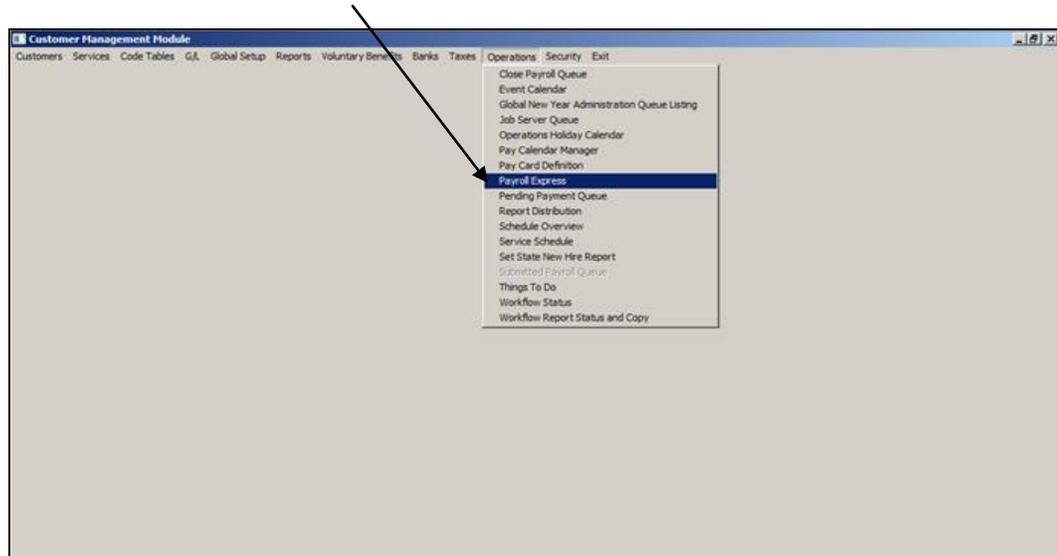
Select a Legal Entity and Payroll Processing Group from the drop down list, if applicable. If these fields are blank, then the user will receive payroll workflow files for all options listed.

Select a user from the drop down list and click on the Add button.

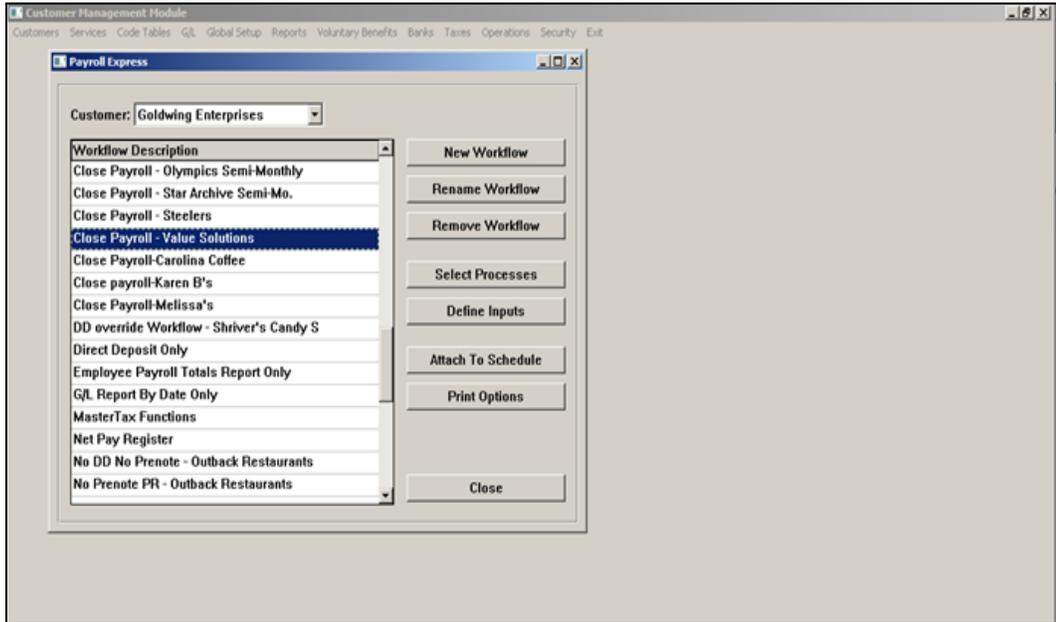


Payroll Express

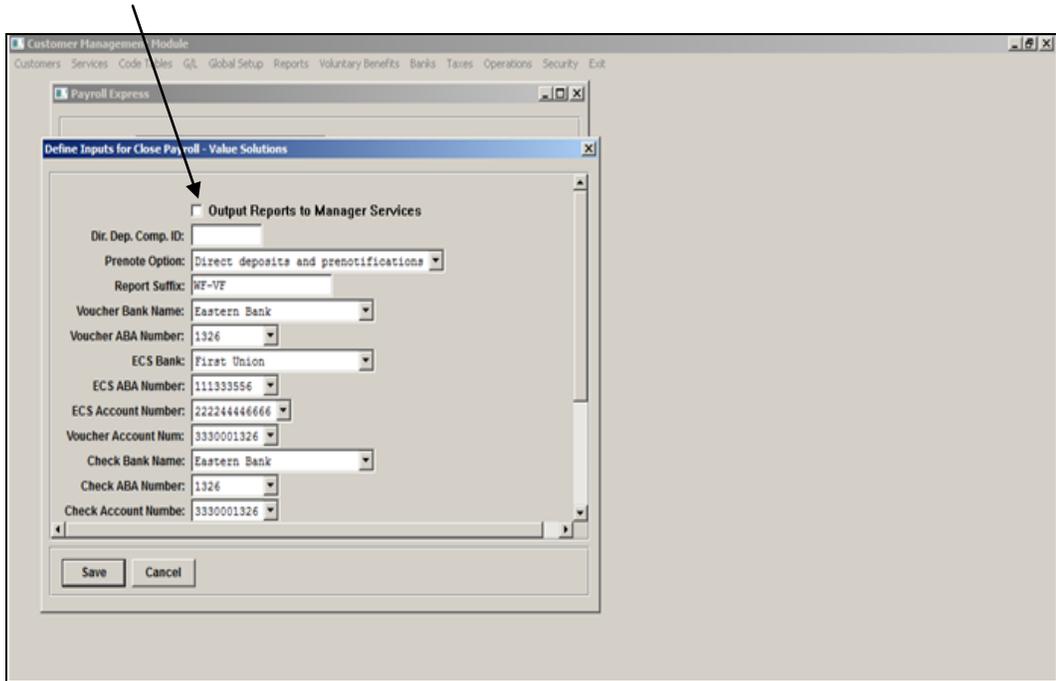
Click on **Payroll Express** option in the Operations menu, as shown below.



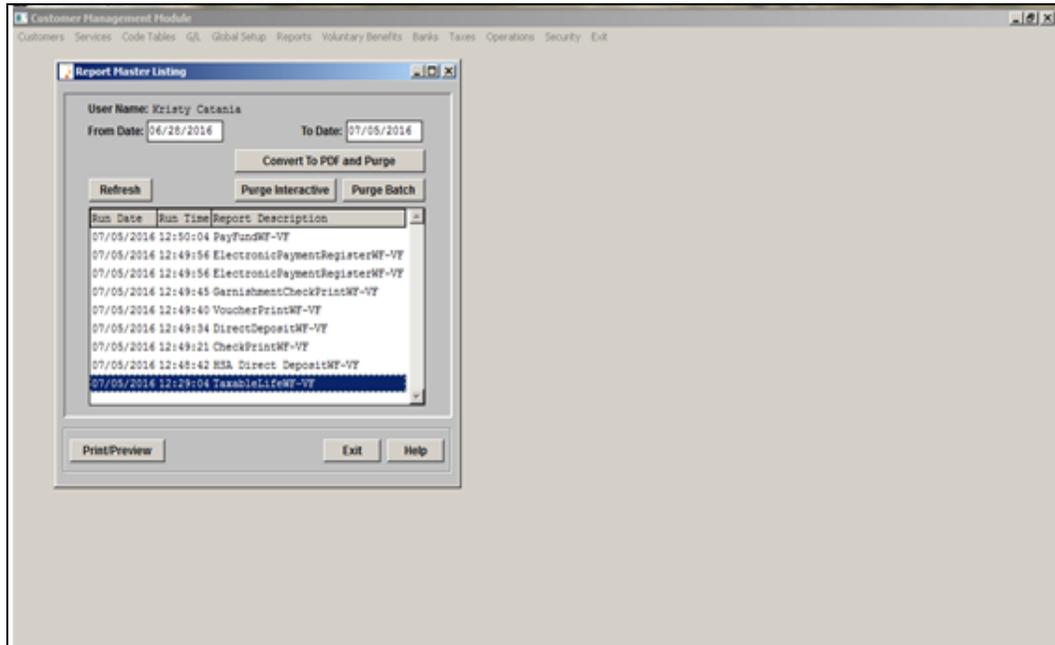
Select the Customer and a Close Payroll workflow, as shown below.



Click on the Define Inputs button to display the check box “Output Reports to Manager Services”. Select the field as required and save your entry.



Once the Workflow process is complete, the reports can be retrieved from the **Report Master Listing**.



Workflow Report Status and Copy

If a report needs to be resent to the **Report Master Listing**, in the Operations menu select **Workflow Report Status and Copy**.



In the **Workflow Report Status** page, highlight the report and click the button Copy Workflow to User.

The screenshot shows the 'Workflow Report Status' application window. It features two data tables and a set of control buttons at the bottom.

Customer ID	Login ID	Workflow Description	Status	Start Date	Start Time	End Date	End Time
2000	kcatania	Basic Payroll - Value Solutions	Completed	07/05/2016	12:26:34	07/05/2016	12:50:14
2000	dev	Basic Payroll - Discovery	Completed	07/01/2016	03:37:19	07/01/2016	03:40:40
2000	carol	Basic Payroll - Starlight	Completed	06/30/2016	10:29:01	06/30/2016	11:01:08
2000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	11:49:16	06/24/2016	11:54:06
1000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	11:41:51	06/24/2016	11:44:42
2000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	11:21:28	06/24/2016	11:23:56
2000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	11:15:07	06/24/2016	11:20:09
2000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	11:05:30	06/24/2016	11:08:55
2000	kpearsall	Close Payroll - KLP Inc.	Completed	06/24/2016	10:55:10	06/24/2016	11:01:26
1000	dev	Close Payroll - KLP Inc.	Completed	06/24/2016	06:24:58	06/24/2016	06:30:09

Report Name	Report Description	PDF File	Run Date
Taxable	TaxableWF-VF	p:\qa1\qa100002\wfpdf\2119-TaxableWF-VF-86114.pdf	07/05/2
HsaList	HSA Direct DepositWF-VF	p:\qa1\qa100002\wfpdf\2119-HSA Direct DepositWF-VF-86115.pdf	07/05/2
checkdetail	CheckPrintWF-VF	p:\qa1\qa100002\wfpdf\2119-CheckPrintWF-VF-86116.pdf	07/05/2
dirdep	DirectDepositWF-VF	p:\qa1\qa100002\wfpdf\2119-DirectDepositWF-VF-86118.pdf	07/05/2
checkdetail	VoucherPrintWF-VF	p:\qa1\qa100002\wfpdf\2119-VoucherPrintWF-VF-86119.pdf	07/05/2
GarnCheckPrint	GarnishmentCheckPrintWF-VF	p:\qa1\qa100002\wfpdf\2119-GarnishmentCheckPrintWF-VF-86121.pdf	07/05/2
ECSPaymentRegister	ElectronicPaymentRegisterWF-VF	p:\qa1\qa100002\wfpdf\2119-ElectronicPaymentRegisterWF-VF-86122	07/05/2
ECSPaymentRegister	ElectronicPaymentRegisterWF-VF	p:\qa1\qa100002\wfpdf\2119-ElectronicPaymentRegisterWF-VF-Sum-86123	07/05/2
PayFund	PayFundWF-VF	p:\qa1\qa100002\wfpdf\2119-PayFundWF-VF-86124.pdf	07/05/2

Buttons at the bottom: Refresh, Send Mail to Administrator, Copy Workflow, Copy Report, Copy Workflow to Users, Close.

Workflow

Workflow Definition

You may set up your system to route certain transactions through a workflow approval process. By doing so, the new information that is requested can be sent to one or more approvers. You have the ability to set up approval processes for these Manager Services functions:

- **Account Distribution**
- **Address**
- **Disciplinary Actions**
- **Employment Status**
- **Job Review**
- **Salary Change** (Standard compensation method)
- **Transfer Employee**

You may attach up to 10 files to the transaction (except for the **Address** function, which currently does not provide file upload capability). The files can be viewed from the individual functions (with the exception of the **Transfer Employee** function; files uploaded when processing a transfer can be viewed in the **Employee Files** function).

While the transaction is in the approval process, it will be held in a pending state. When members of the workflow have approved the transaction, the transaction is completed and the information is added to the iCON database.

The **To Do List** in the menu bar is used to approve or reject workflow transactions; it includes the details and statuses of these transactions, along with any associated files, and any comments that have been made by the requestor or approvers.

Each user who is part of a workflow can set up their notification elections in **My Account**. Users may choose to be notified of workflows via email messages, text messages or both. If no election is made, an email message will be sent.

When defining a workflow, you will set up information in several areas, and then create the approval path. These are the set up steps:

- Define the main workflow information: this includes the workflow name, the sequence in which it will be used, whether or not a document is required when the transaction is requested, and the status (active/inactive).
- You may use sequencing to determine the order in which the system will find the workflow to be used when a transaction is requested. For example, if you want Department ABC to use Workflow 1 (this is accomplished by setting up a filter; see the next bullet point for more

details), and Department DEF to use Workflow 2, and all other Departments to use Workflow 3, you would use the numerical Sequence field to process Workflow 3 last. That way, if an employee was not in Department ABC (sequenced first) or Department DEF (sequenced second), the system would use the workflow for all Departments.

- If you want the person requesting the workflow to attach a document, set the Documentation Required field to Yes. All approvers will then be able to view the document(s). The system will require that at least one document be attached to the transaction in order for it to be saved. If the user tries to save the transaction and no files have been uploaded, a message will appear: Please upload at least one document.
- While adding a workflow, the status is automatically set to Inactive, so that it will not be used until all setup steps have been completed. When you are ready to put the workflow into place, change the status to Active.
- Define the filter: if you want the workflow to apply only under certain circumstances, add a filter such as Organization Level 4 = 'ABC'. In this example, the workflow would only apply to employees in the ABC organization. Each workflow will display the available fields that may be used as filters.
- Define the requestors: a requestor is the user who adds or updates information in the workflow-enabled function. You may define different workflows for different requestors, or set up workflow to be used when any requestor enters information. For example, you may set up workflow to run for all requestors except the HR Director. When a workflow is created, the requestor defaults to All Users; this may be changed.
- Define the members: a member is someone who is involved in the workflow. For example, the employee's Reports To 1 (direct supervisor) and Reports To 2 (direct supervisor's manager) may need to approve the workflow, as well as the HR Director. These relationships need to be defined as Members prior to setting up the Approval Path. When a workflow is created, the system will automatically create members for several levels of the employee's Reports To and the requestor's Reports To; you may add more members if needed.
- Define the messages: e-mail and/or text messages may be sent at various stages of the workflow being processed. Before setting up the Approval Path, the messages are defined. When a workflow is created, default messages will be created; if you want to change the Subject or Text of the default messages, or add more messages, you may do so.
- Define the statuses: as the workflow progresses, you may have the system change the status. The status appears with the workflow in the **To Do List**. Examples would be Requested, Approved by 'User', Rejected by 'User' or Complete. When a Workflow Definition is added to the system, default statuses will be created; you may change these or add new statuses.

Once these areas are defined, you will set up the Approval Path. This tells the system things such as who to notify when a workflow transaction is requested, who gives the first approval, second approval, etc., whether to send reminder messages if an approver does not take action, whether to escalate the workflow to another user if an approver does not take action, who to notify as the workflow progresses and who will give the final approval.

When the setup is complete, you may use the “Test” feature to make sure the workflow will be processed correctly.

Before you add data that will go through the workflow process, make sure that your employees have a Reports To in the **Work Profile** function. You may use the **Reports To** and **Report To By Organization** functions also. Email addresses must be entered in **User Administration**. Each user must be associated with an Employee Number in **User Security**.

If you will be including members who represent various work relationships, such as Human Resources Manager, Payroll Manager, Vice President, etc., set up information in the Business Relationships common object and the **Work Relationships** function.

Files that are associated with a workflow are stored in the function where the data was entered, with the exception of **Transfer Employee**. Files uploaded in **Transfer Employee** can only be seen in the **Employee Files** function. To grant access to these types of files, set up the authorized users in **File Type Security** for Transfer Employee files.

To set up workflow, go to the **Workflow Definition** function. Click on the Add button. In this example, we will create a Workflow from a Template, which will step you through the set up process and automatically create certain data for you. Select the first radio button to Create Workflow from Template, click on the drop-down list in Step 1 and select the template that you wish to work with. In this example, the Basic Transfer workflow will be used.

The screenshot displays the 'Workflow Wizard - Step 1: Select Method' interface. At the top, there are navigation tabs for 'EMPLOYEES', 'BENEFITS', 'HR', and 'PAYROLL'. Below the tabs, the title 'Workflow Wizard - Step 1: Select Method' is shown in orange. There are three radio button options:

- Create Workflow from Template: This option is selected, and a dropdown menu is open next to it, showing 'Basic Transfer'.
- Create Workflow without Template
- Skip Wizard and create blank Workflow

 At the bottom of the form, there are two buttons: a yellow 'next' button with a right-pointing arrow and a red 'cancel' button with a left-pointing arrow.

Click Next to continue. The Workflow Wizard – Step 2 page will appear.

The screenshot shows a web interface for the 'Workflow Wizard - Step 2: Define Main Information'. At the top, there are navigation tabs for 'EMPLOYEES', 'BENEFITS', 'HR', and 'PAYROLL'. Below the title, a note indicates '* = Required'. The form contains five fields:

- *Workflow Type: A dropdown menu with 'MS Transfer Employee' selected.
- *Workflow Name: A text input field containing 'MS Transfer Employee Workflow'.
- *Active: A dropdown menu with 'No' selected.
- *Sequence: A text input field containing '16'.
- *Documentation Required?: A dropdown menu with 'No' selected.

 At the bottom of the form, there are three buttons: 'back' (with a left arrow), 'next' (with a right arrow), and 'cancel' (with a left arrow).

The system will populate the fields as follows. Make any needed changes.

Field	Description
Workflow Type	This field will be populated based on the template you selected; in this example, the MS Transfer Employee type is populated. MS represents transactions initiated in Manager Services.
Workflow Name	A default name will be populated based on the Workflow Type you selected. Workflow Names must be unique
Active	This field will default to No. Only change this to Yes after all set up has been completed and you want the workflow to be used when a user enters data in this function.
Sequence	This field will be populated with the number after the last sequence number for the selected workflow type. The Sequence determines the order in which workflows will be used when an entry is made in a workflow-enabled function. When data is entered, the system will get all Active workflows for the Workflow Type. It will look at the first workflow with the lowest Sequence number; if the Filter applies to the data, and the Requestor is in the list of Included Users, that workflow will be used. If the Filter and/or Requestor does not apply, the system will use the next highest sequence until it finds a workflow where the Filter and Requestor apply. If no Filters apply, workflow will not be used for that transaction.
Documentation Required?	This field will default to No. You may change it to Yes if you require that at least one document be uploaded by the user requesting the workflow. Note that this field appears for all workflows except for MS Address.

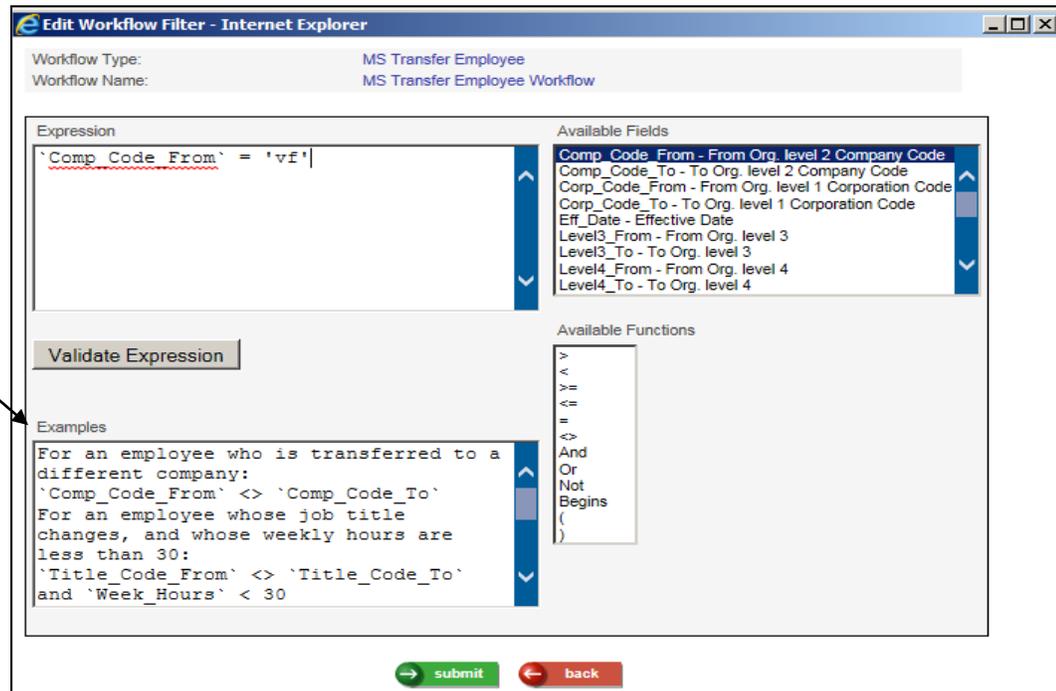
Click Next to continue. The Workflow Wizard – Step 3 page will appear:

This is where you may define filters that determine under which circumstances this workflow will be used. If you want this workflow to always be used, regardless of the data, leave the radio button for None selected. If you want to define a filter for when to use this workflow, select the Custom radio button. An Update button will then appear; click on this button to display the filter page.

A separate window called Edit Workflow Filter will appear. Enter the filter in the Expression box by clicking on the Available Fields and Available Functions that you wish to use. In the example shown below, a filter has been entered that will apply this workflow only for employees whose `Comp_Code_To` is equal to `vf`. This means that when an employee is being transferred to organization level 2 “vf” (the code that is stored in the **Organization Setup** function), this workflow will be used. The Available Fields box shows the data fields that can be used when constructing a filter. The first part of the Available Field shows the field name that must be used in the Expression box, followed by a dash, followed by a further description of the field that will help you identify what the field is. When

you click on one of these fields, the system will populate the field name surrounded by back ticks into the Expression box, where you can either type an equal sign or other sign, or you may click on one of the Available Functions; by so doing, the system will populate that Function into the Expression box.

Examples are provided that will assist you with the syntax that must be followed in the Expression box.



The Available Fields may be typed into the Expression box manually, but you must include them in back ticks.

For alphanumeric field values such as 'vf', you must include them in single or double quotes. For numeric field values do not include quotes. For date fields, enter the dates with slashes and no quotes, such as 'Eff_Date' >= 1/1/2016.

When you are defining a filter to apply to employees in a particular organization, you may use only the lowest level in the filter, as long as it is unique. For example, if you define divisions at level 3 and departments at level 4, and you want this workflow to apply to the Administrative department whose code is 'ADMIN' for only divisions A and B, and not divisions C and D, you would need to enter a filter for both levels, such as:

('Level3_From' = 'A' and 'Level4_From' = 'ADMIN') or
('Level3_From' = 'B' and 'Level4_From' = 'ADMIN')

If you enter the following, it would apply to Level 4 ADMIN for all divisions:

'Level4_From' = 'ADMIN'

Here is an example of the “Not” function: to initiate workflow only for a transfer where the Reason doesn’t begin with “Z”:

Not(`Reason` begins `Z`)

Pay special attention to the use of parentheses. Consider the following example, where the Status Change workflow should be used if an employee is going from Status ACT, AFT or APT, and is going to one of the following Statuses: INA, TER, RES, DS:

(`Ee_Status_From` = "ACT" or `Ee_Status_From` = "AFT" or
 `Ee_Status_From` = "APT") and
 (`Ee_Status_To` = "INA" or `Ee_Status_To` = "TER" or `Ee_Status_To`
 = "RES" or `Ee_Status_To` = "DS")

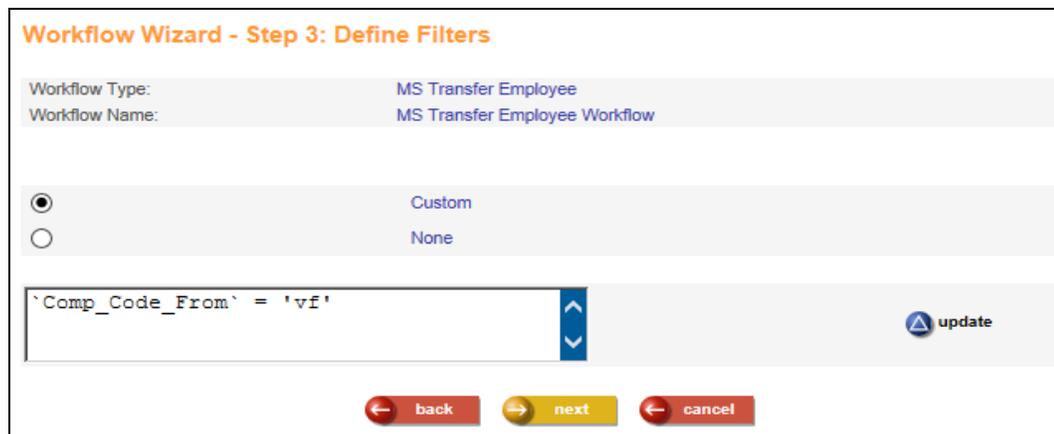
For some Workflow Types such as MS Address, an Available Field called AddUpd can be used. You can set up different filters for whether a record is added or updated. If you wish to use this field, use either ‘ADD’ or ‘UPD’ as the field value:

`AddUpd` = ‘ADD’ for this workflow to apply when a record is added, or
 `AddUpd` = ‘UPD’ for this workflow to apply when a record is updated

If you want the workflow to be used when information is added or updated, do not enter a filter for this field.

If you want the workflow to apply only to employees who report to a certain supervisor, use the `Reports_To` filter. Enter the employee number in single quotes, since it is an alphanumeric field, such as: `Reports_To` = ‘123456’.

Click on Validate Expression to see if your filter is valid; a message will appear. Make any needed changes. Click on the Submit button when you have finished entering the filter. The filter will be displayed on Workflow Wizard – Step 3:



Workflow Wizard - Step 3: Define Filters

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

Custom
 None

``Comp_Code_From` = `vf`` update

back next cancel

Click Next to continue. The Workflow Wizard – Step 4 page will be displayed.

On this page, define the work relationships that will either approve/reject the workflow (Approvers), or who will be notified but do not have an approval role (Viewers). You must define these relationships in the proper order of how the workflow will progress on once data has been entered in one of the workflow-enabled functions.

In each drop down list on this page, the list of available Members will appear. These include five levels of the requestor’s Reports To (RT) and five levels of the employee’s Reports To. All of the entries in the Business Relationships common object will also appear, such as those shown in this example: Benefits Coordinator, Benefits Manager, Controller, etc. Each Business Relationship will appear twice: once to represent the person associated with the employee (EMP), and once to represent the person associated with the requestor (REQ).

If you wish to add a Work Relationship value to this list, click on Add New Work Relationship Code. This will bring up a separate window with the Business Relationships common object, where you can add or update values. When you have finished, close the Business Relationships window and click on the Refresh button. This will cause your new entries to appear in the drop-down lists in the Approver and Viewer columns.

If you need to define the employees who are in those Work Relationships, click on Define Work Relationships. This will open a separate window where you can enter information in the **Work Relationships** function. For example, this is where you would define the employee numbers who represent the Benefits Coordinator, Benefits Manager and Controller for each organization level.

Warning: If you select a Work Relationship value (one that is not an Employee RT or Requestor RT) in any of the Approver or Viewer columns on Step 4 of the Workflow, the employees must first be defined in the **Work Relationships** function before you set the Workflow to Active = Yes. It does not have to be done while you are adding the Workflow Definition; you can access the **Work Relationships** function after you have completed the Workflow Definition, but it must be done *before* activating the workflow. Otherwise, any transactions that are entered will not be able to be completed, because the system won't know who the approvers are.

Select the first Approver on Step 1, the second Approver on Step 2, etc. If you wish to notify someone that the workflow has been submitted, you may select up to three Viewers on Step 1.

You may select up to 10 steps of approval. Regardless of the number of steps that you define, the last step that you define will be considered the final approval. If you want to allow more than one person to do the final approval, enter up to three Approvers on your final Step.

Consider the following example. You want the Employee's Reports To 1 to do the first approval, the Employee's Reports To 2 to do the second approval, and then have the final approval done by *either* the HR Assistant or HR Manager of the employee. When the transaction is requested, you want the Controller to receive notification, but no action is required by this person. The Steps would be set up as follows:

Workflow Wizard - Step 4: Define Members

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

[Add New Work Relationship Code](#) [refresh](#) [Define Work Relationships](#)

Notify Final Approver(s) on Workflow Initiation Allow Final Approver(s) to provide final approval at any point in the approval process

Step# / Approval Level	Approver 1	Approver 2	Approver 3	Viewer 1	Viewer 2	Viewer 3
1	Employee RT1			Controller (EMP)		
2	Employee RT2					
3	HR Assistant (EMP)	HR Manager (EMP)				
4						
5						
6						
7						
8						
9						
10						

[back](#) [next](#) [cancel](#)

If you want the final approvers to receive a message when the requestor enters the transaction, make sure the checkbox for “Notify Final Approver(s) on Workflow Initiation” is selected. If you want the final approvers to be able to approve the transaction at any time, make sure the checkbox for “Allow Final Approver(s) to

provide final approval at any point in the approval process” is selected. These checkboxes are selected by default.

Click Next when you have finished defining the approvers and viewers. The Workflow Wizard – Step 5 page will appear. The system will populate the approvers that you entered on Step 4, as shown in this example:

EMPLOYEES							BENEFITS							HR							PAYROLL						
Workflow Wizard - Step 5: Define Reminders and Escalations																											
Workflow Type:														MS Transfer Employee													
Workflow Name:														MS Transfer Employee Workflow													
Level	Approver	Response	Time interval before Reminder / Escalation	Frequency Type	Skip Days	Maximum Reminders																					
1	Employee RT1	<input type="checkbox"/> REMIND	<input type="text"/>	Days	None	<input type="text"/>																					
1	Employee RT1	<input type="checkbox"/> ESCALATE	<input type="text"/>	Days	None	<input type="text"/>																					
2	Employee RT2	<input type="checkbox"/> REMIND	<input type="text"/>	Days	None	<input type="text"/>																					
2	Employee RT2	<input type="checkbox"/> ESCALATE	<input type="text"/>	Days	None	<input type="text"/>																					
3	HR Assistant (EMP)	<input type="checkbox"/> REMIND	<input type="text"/>	Days	None	<input type="text"/>																					
3b	HR Manager (EMP)	<input type="checkbox"/> REMIND	<input type="text"/>	Days	None	<input type="text"/>																					
							<input type="button" value="← back"/> <input type="button" value="→ next"/> <input type="button" value="← cancel"/>																				

In Step 5, set up timing for any reminders or escalations that you wish to occur. If you enter data on the REMIND row, the REMINDER message will be sent as an e-mail and/or text message to the approver when he or she does not respond in a certain amount of time, depending on that person’s Workflow Notification Election in **My Account**. If the user has made no election, an email message will be sent. In the Skip Days drop-down list, you may leave the default of None, which will send reminders on each calendar day, including weekends and holidays. Or, you may select a value from the drop-down list to Skip Days for: Holidays, Weekends or Weekends and Holidays.

If you wish to escalate the workflow to the next approver when someone does not take action within a certain amount of time, enter that information on the ESCALATE row.

In the following example, a reminder will be sent in 1 day to Employee RT1 if he or she does not approve or reject the workflow. Another reminder will be sent on the second next day (maximum reminders = 2). If Employee RT1 still has not taken action, the workflow will be escalated to Employee RT2 in 3 days. Once it is on the **To Do List** for Employee RT2, a reminder will be sent if he or she has not taken action in 1 day. Another reminder will be sent on the 2nd day. If after 3 days no action has been taken, the workflow will be escalated to both final approvers: the HR Assistant and the HR Manager. These reminders and escalations will not occur on weekends or holidays.

In this example, no reminders or escalations are defined for the final approvers.

EMPLOYEES **BENEFITS** **HR** **PAYROLL**

Workflow Wizard - Step 5: Define Reminders and Escalations

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

Level	Approver	Response	Time interval before Reminder / Escalation	Frequency Type	Skip Days	Maximum Reminders
1	Employee RT1	<input checked="" type="checkbox"/> REMIND	1	Days	Weekends and Holidays	2
1	Employee RT1	<input checked="" type="checkbox"/> ESCALATE	3	Days	Weekends and Holidays	
2	Employee RT2	<input checked="" type="checkbox"/> REMIND	1	Days	Weekends and Holidays	2
2	Employee RT2	<input checked="" type="checkbox"/> ESCALATE	3	Days	Weekends and Holidays	
3	HR Assistant (EMP)	<input type="checkbox"/> REMIND		Days	None	
3b	HR Manager (EMP)	<input type="checkbox"/> REMIND		Days	None	

← back → next ← cancel

Click Next when you have finished defining reminders and escalations. The Workflow Wizard – Step 6 will appear. The system creates the following default messages.

EMPLOYEES **BENEFITS** **HR** **PAYROLL**

Workflow Wizard - Step 6: Define Messages + add

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

Message ID	Message Subject	Action
AFTERAPPROVAL	Transfer Employee Workflow Is Waiting For Your Review And Approval	delete
AFTERDATACHG	The Data Has Changed For The Transfer Employee Workflow	delete
AFTERFINALAPPRVL	Transfer Employee Workflow Has Received Final Approval	delete
AFTERREJECTION	Transfer Employee Workflow Has Been Rejected	delete
AFTERREQUEST	A New Transfer Employee Workflow Is Waiting For Your Review And Approval	delete
ESCALATEDFROM	Transfer Employee Workflow Escalated	delete
ESCALATEDTO	Transfer Employee Workflow Escalated to You for Review And Approval	delete
NOTIFYFINALAPPRVR	Transfer Employee Workflow Notification - No Action Required	delete
NOTIFYVIEWER	Transfer Employee Workflow Has Been Requested - No Action Required	delete
NOTIFYWITHAPPROVAL	Transfer Employee Workflow Waiting For Your Final Approval	delete
ONERROR	Transfer Employee Workflow - Error Notification	delete
PENDINGFINALAPPRVL	Transfer Employee Workflow Pending Final Approval	delete
REMINDER	Reminder of Transfer Employee Workflow Waiting For Your Review	delete

← back → submit ← cancel

Click on the Message ID if you wish to change the Message Subject and/or Text for any of these messages. The Message ID field for the default message is hard-coded by the system; it cannot be changed. If you update one of the default

messages, you will notice that there is an Initiate Transaction field. If this field contains the name of the workflow, it means that an action will be initiated when this message is sent. Do not change the Initiate Transaction field for the default messages.

Workflow Wizard - Step 6: Define Messages

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

Message ID: AFTERAPPROVAL
 Initiate Transaction: MS Transfer Employee Workflow

*Message Subject: Transfer Employee Workflow Is Waiting For Your Review And Approval

*Email Message:
 The Transfer Employee workflow for `Full_Name` is now waiting for your approval. Please log in at <http://mgr.unicornhro.com>, then click on To Do in the banner to review the details of this pending transaction before deciding to approve or reject it.

*SMS Text Message:
 The Transfer Employee workflow for `Full_Name` is now waiting for your approval. Please log in at <http://mgr.unicornhro.com>, then click on To Do in the banner to review the details of this pending transaction before deciding to approve or reject it.

You may add data elements to the Message Subject, Email Message or SMS Text Message. In the above example, the `Full_Name` data element is in the Email Message and SMS Text Message. Each Workflow Type has data elements specific to the transaction that you can add to the message; this will give the approver or viewer information about the workflow that is being processed.

At the bottom of the page, the available data elements display. The system shows the data element that will be included in back ticks, such as `Full_Name`. Following the data element, a description of the field appears.

Click in the Subject or Message field where you want to add a data element; then click on the data element that you wish to insert. When you have finished updating information for this message, click Submit to save your changes.

Add Data Element:

Click on a Data Element in order to add it to the current position.

Data Elements:

- Eff_Date - Effective Date
- Employee# - Employee Number
- Full_Name - Employee Name
- NewJob - New Job Title
- NewOrg - New Org Level
- OldJob - Old Job Title
- OldOrg - Old Org Level
- RequestDate - Requested Date
- RequestTime - Requested Time

submit cancel

You may add messages if needed. These messages can then be associated with an action in the Approval Path. Click Submit on Step 6 when you have completed defining the messages that will be used. A confirmation message will appear that the Workflow setup was completed successfully.

Approval Path

After adding a workflow, the system will display the Workflow Approval Path page. These steps were created based on the entries that you made during the wizard process. Here is an example of this page:

The screenshot displays the 'Workflow Approval Path' configuration page. At the top, there are navigation tabs for 'EMPLOYEES', 'BENEFITS', 'HR', and 'PAYROLL'. Below these, the title 'Workflow Approval Path' is shown with an '+ add' button. The workflow details are: 'Workflow Type: MS Transfer Employee' and 'Workflow Name: MS Transfer Employee Workflow'. A note states: 'Click on the plus sign to expand the Step. To update, click on information in the left column.' There are 'Show All' and 'Hide All' links. The main table lists the steps:

Step#	Description	Member	Action
1	Start	N/A	N/A
2	Requestor	Requestor	delete
3	System	System	delete
4	Approval by EMPRT1	Employee RT1	delete copy
5	Approval by EMPRT2	Employee RT2	delete copy
6	Final Approval by hr2(EMP)	HR Assistant (EMP)	delete copy
7	Final Approval by hrm(EMP)	HR Manager (EMP)	delete copy
8	End	N/A	N/A

At the bottom of the table, there are '+ add' and '← back' buttons.

The Approval Path determines what will happen at each step of the workflow. The following steps are required:

- **Start:** this is created automatically by the system, and is the first Step.
- **Requestor:** this determines what happens when a user enters data in a workflow-enabled function.
- **System:** this includes actions that the system performs, such as setting a status when the workflow is complete.
- **Approve/Reject:** at least one approve/reject step must be specified. Final Approval steps may also be defined.
- **End:** this is created automatically by the system, and is the last Step.

Below is an example of the Processes that are associated with the Request Step Type. In our example, the workflow wizard automatically created these Processes that will occur when a transaction is requested:

- Process 1 sets the workflow status to Requested by `User`; when any of the workflow members view it in the **To Do List**, this Status will appear.
- Process 2 will send the AFTERREQUEST message to Employee RT1; this is the employee's Reports To as stored in the **Work Profile** function.
- Process 3 will send the NOTIFYFINALAPPRVR message to the HR Assistant, as defined in the **Work Relationships** function.
- Process 4 will send the NOTIFYFINALAPPRVR message to the HR Manager.
- Process 5 will send the NOTIFYVIEWER message to the Controller.

The screenshot shows the 'Approval Path Step Detail' interface. At the top, there are navigation tabs for EMPLOYEES, BENEFITS, HR, and PAYROLL. The main title is 'Approval Path Step Detail'. Below the title, there are fields for 'Workflow Type' (MS Transfer Employee) and 'Workflow Name' (MS Transfer Employee Workflow). The 'Step Type' is set to 'Request', and the 'Step#' is '2'. The 'Description' is 'Requestor' and the 'Member' is 'Requestor'. Below these fields, there are instructions: 'To update, click on information in the left column.' and a row of action buttons: 'Request', '+ add', 'Move Up', and 'Move Down'. The main part of the interface is a table with the following data:

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Requested by `User`			delete
2	Send Message	AFTERREQUEST	APP	Employee RT1	delete
3	Send Message	NOTIFYWITHAPPROVAL	FA	HR Assistant (EMP)	delete
4	Send Message	NOTIFYWITHAPPROVAL	FA	HR Manager (EMP)	delete
5	Send Message	NOTIFYVIEWER		Controller (EMP)	delete

At the bottom of the interface, there are two buttons: 'submit' (green) and 'cancel' (red).

For the Approve/Reject step, the wizard in our example has created Processes for the APPROVE, REJECT, REMIND and ESCALATE actions.

When the Employee's Reports To 1 approves the workflow, the workflow status will be set to Approved by `User`. The AFTERAPPROVAL message will be sent to the employee's Reports To 2, to let him or her know that they must now approve it.

If the Employee's Reports To 1 rejects the workflow, the workflow status will be set to Rejected by `User`. The AFTERREJECTION message will be sent to the

Requestor. The workflow will be stopped and ended; the workflow will no longer appear as pending for any of the members.

If the Employee's Reports To 1 does not take action in one day, a REMINDER message will be sent. Two REMINDER messages will be sent if no action is taken.

It will go to the ESCALATE process in 3 days if no action is taken.

*Step Type: Approve/Reject
 *Step#: 4
 *Description: Approval by EMPRT1
 *Member: Employee RT1

To update, click on information in the left column.

Action: APPROVE + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Approved by 'User'			delete
2	Send Message	AFTERAPPROVAL	APP	Employee RT2	delete

Action: REJECT + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Rejected by 'User'			delete
2	Send Message	AFTERREJECTION		Requestor	delete
3	Stop Transaction				delete
4	End				delete

Action: REMIND + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Send Message	REMINDER		Employee RT1	delete

AUTO RESPONSE

Frequency	Frequency Type	Skip Days	Maximum Reminders	Action
1	Days	Weekends and Holidays	2	delete

Action: ESCALATE + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Escalated from 'User'			delete
2	Send Message	ESCALATEDFROM		Employee RT1	delete
3	Send Message	ESCALATEDTO	APP	Employee RT2	delete

AUTO RESPONSE

Frequency	Frequency Type	Skip Days	Action
3	Days	Weekends and Holidays	delete

→ submit ← cancel

The workflow wizard automatically created the following Processes for the HR Manager, a final approver. If he or she approves the workflow, the status will be set to Approved by 'User'. The transaction will be saved; the next step is SYS (System). If the user rejects the workflow, the status will be set to Rejected by 'User'. The transaction will be stopped; no further action will be taken. No Reminders or Escalations are defined.

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

*Step Type: Final Approval
 *Step#: 7
 *Description: Final Approval by hrm(EMP)
 *Member: HR Manager (EMP)

To update, click on information in the left column.

Action: APPROVE + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Approved by 'User'			delete
2	Save Transaction		SYS		delete

Action: REJECT + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Rejected by 'User'			delete
2	Send Message	AFTERREJECTION		Requestor	delete
3	Stop Transaction				delete
4	End				delete

Action: REMIND + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

The workflow wizard automatically created the following Processes for the System member. When one of the final approvers approves the workflow, the system will consider the workflow SAVED, and the workflow status will be set to Complete. The AFTERFINALAPPRVL message will be sent to the Requestor.

If an error occurs, the workflow status will be set to Error, and the ONERROR message will be sent to the Requestor. The workflow will end and no further action can be taken. If needed, the requestor can submit another transaction.

*Step Type: System
 *Step#: 3
 *Description: System
 *Member: System

To update, click on information in the left column.

Action: SAVED + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Complete			delete
2	Send Message	AFTERFINALAPPRVL		Requestor	delete
3	End				delete

Action: ERROR + add ▲ Move Up ▼ Move Down

Process#	Process	Value	Next	Receiving Member	Action
1	Set Status	Error			delete
2	Send Message	ONERROR		Requestor	delete
3	Stop Transaction				delete
4	End				delete

Action: UserDef1 + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

Action: UserDef2 + add

On the Workflow Approval Path page, click on “+” next to any of the Steps in order to see the Processes that are included in that Step. You may click Show All to view all of the Processes.

You may click on the Copy button next to an Approval or Final Approval step. The system will prompt you for the new Step Number and Member. You may then make any changes to the new information that was created.

You may add or update Steps as needed. The available Step Types are: Approve/Reject, Final Approval, Request or System.

Approval Path Step Detail

* = Required

Workflow Type: MS Transfer Employee
 Workflow Name: MS Transfer Employee Workflow

*Step Type: *no value
 *Step#:
 *Description:
 *Member: Controller (EMP)

Approve/Reject
 Final Approval
 Request
 System

submit cancel

Based on the Step Type that you select, the system will display the applicable Actions. When the Approve/Reject or Final Approval Step Type is selected, and available Actions are APPROVE, REJECT, REMIND, AUTO RESPONSE (for REMIND), ESCALATE and AUTO RESPONSE (for ESCALATE). Actions in the APPROVE and REJECT sections are mandatory; the REMIND and ESCALATE sections are optional.

*Step Type:
 *Step#:
 *Description:
 *Member:

To update, click on information in the left column.

Action: APPROVE + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

Action: REJECT + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

Action: REMIND + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

AUTO RESPONSE + add

Frequency	Frequency Type	Skip Days	Maximum Reminders	Action
Not Configured				

Action: ESCALATE + add

Process#	Process	Value	Next	Receiving Member	Action
Not Configured					

AUTO RESPONSE + add

Frequency	Frequency Type	Skip Days	Action
Not Configured			

When you select the Request Step Type, the Request Action will be shown. Processes in the Request section are required.

When you select the System Step Type, the SAVED, ERROR, UserDef1, UserDef2 and UserDef3 Actions will be shown. Processes in the Saved and Error sections are required. The UserDef sections must be set up if they are referenced by any other Process.

To work with Processes in a Step, click on the Step# to go to the Approval Path Step Detail page. When adding a Process, the following options are available:

Add Process for Request

* = Required

Workflow Type:	MS Transfer Employee		
Workflow Name:	MS Transfer Employee Workflow		
Step Type:	Request	Step#:	2
Description:	Requestor	Member:	Requestor

*Process:	*no value
Value:	Custom
Next Step:	End
Receiving Member:	GoTo Member/Action
Process#:	GoTo UserDef
	If Then
	Save Transaction
	Send Message
	Set Status
	Stop Transaction
	Submit Without Message

- Custom: a programmer may enter specific code to be run
- End: this will end all processing; it should be preceded by a Stop process for a REJECT or ERROR action. In the SAVED action, the Stop process is not needed; include the End process.
- GoTo Member/Action: this will direct the workflow to a particular Action and Member.
- GoTo UserDef: this will direct the workflow to one of the 3 available User Defined steps. Set up UserDef1, UserDef2 and/or UserDef3 in the System step.
- If Then: enter an if/then statement, including instructions for what the system should do next. Consider the following examples:
 - In the Request action, enter the following If Then statement for the scenario where the requestor’s Reports To is blank (a space surrounded by double quotes), meaning that the person is at the top level of the company, such as President (where “REQRT1” is the Member ID for the Reports To 1), and you want the system to skip to UserDef1 rather than using the remaining Processes in the Request action:
 - IF USER(REQRT1) = “ “ THEN GOTO USERDEF1

Step Type:	Request	Step#:	2
Description:	Requestor	Member:	Requestor

*Process:	If Then
*Value:	IF USER(REQRT1) = " " then GOTO UserDef1
Next Step:	N/A
Receiving Member:	N/A
*Process#:	5

- In the Request action, enter the following If Then statement for the scenario where the requestor's Reports To is the President (where "REQRT1" is the Member ID for the Reports To 1, and "PRES-REQ" is the Member ID of Work Relationship "President" for this workflow):
 - IF EMP(REQRT1) = EMP(PRES-REQ) THEN GOTO USERDEF1

Step Type:	Request	Step#:	2
Description:	Requestor	Member:	Requestor
*Process:	If Then <input type="button" value="v"/>		
*Value:	IF EMP(REQRT1) = EMP(PRES-REQ) THEN GOTO USERDEF1 <input type="button" value="x"/>		
Next Step:	N/A		
Receiving Member:	N/A		
*Process#:	<input type="text" value="5"/>		

- Save Transaction: this is used in the APPROVE action after the final approval is made, typically with a Set Status process of Approved
- Send Message: this will send the selected message to a particular user
- Set Status: this will change the status of the workflow, as seen in the **To Do List** and **Workflow Statistics**
- Stop Transaction: this will stop the workflow; it should be followed by an End process
- Submit Without Message: this gives authority to a user to approve the transaction, without sending a message to that person

After you have created a workflow using a template or wizard, it is recommended that you run the "Test" feature from the main Workflow Definition page. This will alert you to any missing data before you activate the workflow. Refer to the Prerequisites section of this document for setting up the required data.

Also before activating a workflow, make sure that the Sequence is correct. From the list of Workflow Definitions, you may click on "Yes" in the Filter column to see when each workflow will be used. Make sure that the Sequence for your new workflow will cause it to be processed at the correct time for the correct data.

You may update a workflow by clicking on the Workflow Name from the main Workflow Definition page. Click on the tab that you wish to work with: Main, Filter, Requestors, Members, Messages or Statuses. Refer to the Updating a Workflow section of this document for more information on each tab. The Approval Path may also be accessed from the main Workflow Definition page.

For more instructions on adding workflows, see the help text for the **Workflow Definition** function in Manager Services.

Workflow Processing

When a Workflow Definition exists and a user enters information in any of the workflow-enabled functions, an Add Workflow Comment window similar to the following will appear when that user saves the information. In this example, the user entered information in the **Transfer Employee** function.

Add Workflow Comment

The Workflow Job shown below has been submitted. To add an optional comment, fill in the comment field at the bottom of the page and press Add. If you do not want to add a comment, just close this window.

Workflow Name: MS Transfer Employee Workflow
 Employee: Nanette Smith (999)
 Status: Requested by Carol Bradbury

New Position		Current Position	
Organization:	Wayne	Organization:	Florham Pk N
Job Title:	Manager - Intermediate Level	Job Title:	Accounts Receivable Supervisor
Effective Date:	06/23/2016		
Weekly Hours:	40		
Reason For Change:	Transfer		
Replace Position:	Yes		
Update Lump Sums:	yes		

[File Name](#) [Date Loaded](#) [Attached Document](#)

Comment:

The system will display the Workflow Name that is being used, as well as information that the user entered. If a file was uploaded, the user may view it at this time. At the bottom of this window, a Comment field is available, where the user may enter any other information that may be useful to the approvers. Click on the Add button below the Comment field to save this information. If no Comment is entered, the user may click on either the Add button or the Close This Window button. The information will then be stored in the pending status until it receives final approval.

In the **To Do List**, which is accessed from the menu bar, you may view the workflows that you have submitted. The choices in the Workflow field are: All Workflows, Pending, In Process, Approved or Rejected. You may change the Date Requested field in order to see workflows from a particular time period. You may also enter an Employee Number if you wish to see workflows for a particular employee. Click on the Refresh button after changing any of these selection fields.

The screenshot shows the 'To Do List' interface with the following filters: Workflow: All Workflows, Date Requested: This Month, Employee Number: (empty). A table lists three workflows:

Transaction	Employee	Last Name	First Name	Status	Date Requested	Time Requested	Action	Comment
MS Transfer Employee Workflow	999	Smith	Nanette	Requested by Carol Bradbury	06/23/2016	5:55:51 PM		
MS Transfer Employee Workflow	999	Smith	Nanette	Complete	06/20/2016	4:22:55 PM		
Salary Change in Florham Park and >\$2000	999	Smith	Nanette	Complete	06/20/2016	4:21:31 PM		

Here is an example of All Workflows. To see more details about a workflow, click on the “+” button to expand it.

The screenshot shows the 'To Do List' interface with the following filters: Workflow: All Workflows, Date Requested: This Month, Employee Number: (empty). The first workflow is expanded to show details:

Transaction	Employee	Last Name	First Name	Status	Date Requested	Time Requested	Action	Comment
MS Transfer Employee Workflow	999	Smith	Nanette	Requested by Carol Bradbury	06/23/2016	5:55:51 PM		

Expanded details for the selected workflow:

- New Position:**
 - Organization: Wayne
 - Job Title: Manager - Intermediate Level
 - Effective Date: 06/23/2016
 - Weekly Hours: 40
 - Reason For Change: Transfer
 - Replace Position: Yes
 - Update Lump Sums: yes
- Current Position:**
 - Organization: Florham Pk N
 - Job Title: Accounts Receivable Supervisor

At the bottom, there are links for [File Name](#), [Date Loaded](#), and [Attached Document](#).

Or, you may click on the Transaction name in the left column to see the Workflow History page, which includes the details of the transaction, responses, comments and any errors that may have occurred.

Workflow History

Workflow Name: MS Transfer Employee Workflow
 Employee: Nanette Smith (999)
 Status: Complete

New Position		Current Position	
Organization:	Florham Pk N	Organization:	Florham Pk N
Job Title:	Accounts Receivable Supervisor	Job Title:	Manager - Intermediate Level
Effective Date:	06/20/2016		
Weekly Hours:	40		
Reason For Change:	Transfer		
Replace Position:	Yes		
Update Lump Sums:	no		

[File Name](#) [Date Loaded](#) [Attached Document](#)

Responses						
Member	User	Notification Date	Notification Time	Response Date	Response Time	Response
HR Manager (EMP)	Donna Reynolds	06/20/2016	4:22:57 PM	06/20/2016	4:44:09 PM	APPROVED (FINAL)
HR Assistant (EMP)	Theresa Bolser	06/20/2016	4:22:57 PM			
Employee RT1	Jim Boniger	06/20/2016	4:22:56 PM			
Requestor	Carol Bradbury	06/20/2016	4:22:55 PM			REQUESTED

Comments				
Member	User	Comment Date	Comment Time	Comment

People who have been defined as approvers or final approvers will see the Approve and Reject checkboxes on their **To Do List**, as well as a Comments field. The user can click in the Approve or Reject checkbox. Comments are optional. When all entries have been made, click on the Submit button to save the changes. Note that Comments can be entered and saved with the workflow, without approving or rejecting it; you must click on Submit to save them.

When an approver approves the workflow, the actions associated with the APPROVE process will be taken. When an approver rejects the workflow, the actions associated with the REJECT process will be taken.

To Do List

Workflow: Date Requested: Employee Number:

Click on the plus sign to expand the item. To access, click on information in the left column.

Transaction	Employee	Last Name	First Name	Status	Date Requested	Time Requested	Action	Comment
Salary Change in Florham Park and >\$2000	999	Smith	Nanette	Requested by Carol Bradbury	06/23/2016	6:04:26 PM	<input type="checkbox"/> Approve <input type="checkbox"/> Reject	<input type="text"/>
MS Transfer Employee Workflow	999	Smith	Nanette	Requested by Carol Bradbury	06/23/2016	5:55:51 PM	<input type="checkbox"/> Approve <input type="checkbox"/> Reject	<input type="text"/>

Workflow Statistics

This function may be used to see how many workflows are in process, approved or rejected. If you were a member of any of these workflows, you may view the details for the transaction.

Workflow Statistics

Active: Date Range: Employee Number:

Type: Rows Per Page:

To view details, click on count.

Name	Type	In Process	Approved	Rejected	Active
Account Distr. from Wizard Lev3 Beg. 'M'	MS Account Distribution	0	2	0	Yes
Account Distr. Manually Added; Lev 3 < W	MS Account Distribution	6	5	0	Yes
Account Distribution in Value-Florham Pk	MS Account Distribution	0	30	5	Yes
Account Distribution in Value-Morristown	MS Account Distribution	3	4	0	Yes
Account Distribution in Wizard RT = 6070	MS Account Distribution	0	1	1	Yes
Address Change - Check Address (04)	MS Address	0	2	0	Yes
Address Workflow - California VF	MS Address	0	5	1	Yes
Address Workflow for Value Solutions	MS Address	0	5	1	Yes
MS Address Workflow-Value Solutions	MS Address	0	12	1	Yes
MS Address Workflow: FL2 Update	MS Address	0	4	0	Yes

Page: 1 of 4

The system will default to showing the counts of all Active workflows for the Current Month. You may change the selections using the following filters:

- Active: Yes, No or All (as defined in **Workflow Definition**)
- Date Range: Current Month, Quarter or Year; Previous Month, Quarter or Year
- Type: select a Workflow Type or All types
- Employee Number: select a specific employee number or leave blank for all employees
- Rows Per Page: 10, 20, 50 or 100

If you change any of the filter values, click on Refresh to display updated counts.

When you click on a count, the list of workflows in which you were a member will display. Note that because of this security feature, the count on the main page may be higher than the number of workflows that are displayed on the detail page.

Workflow Statistics

Click on the plus sign to expand the item. Only the workflow transactions that you were a part of are displayed.

Transaction	Employee	Last Name	First Name	Status	Date Requested	Time Requested
MS Transfer Employee Workflow	999	Smith	Nanette	Complete	06/23/2016	5:55:51 PM
MS Transfer Employee Workflow	999	Smith	Nanette	Complete	06/20/2016	4:22:55 PM

back

You may click on “+” to view the details for the workflow. If any files were associated with the workflow, you may view them from the details section.

iCON Tools Module

New Year Administration

If this function was run using either the Deduction Rules or All of Above selections, and was run in Local mode, an error would appear if a deduction had an invalid Date Rounding Formula. The error previously said “Date Rounding Spec Definition does not exist in Date Rounding Algorithm Definitions”; this error has been changed to “Date Rounding Formula does not exist.”

State Withholding Tax

Idaho Income Tax Withholding

Idaho has released their 2016 income tax withholding tables. The annual allowance increased to \$4,050 for 2016 from \$4,000 for 2015. In addition, the tax table upper income levels have also changed. The withholding tax rates have not changed. The supplemental tax rate remains at 7.4%.