Manager Services Menu Navigation

Employee Search Options

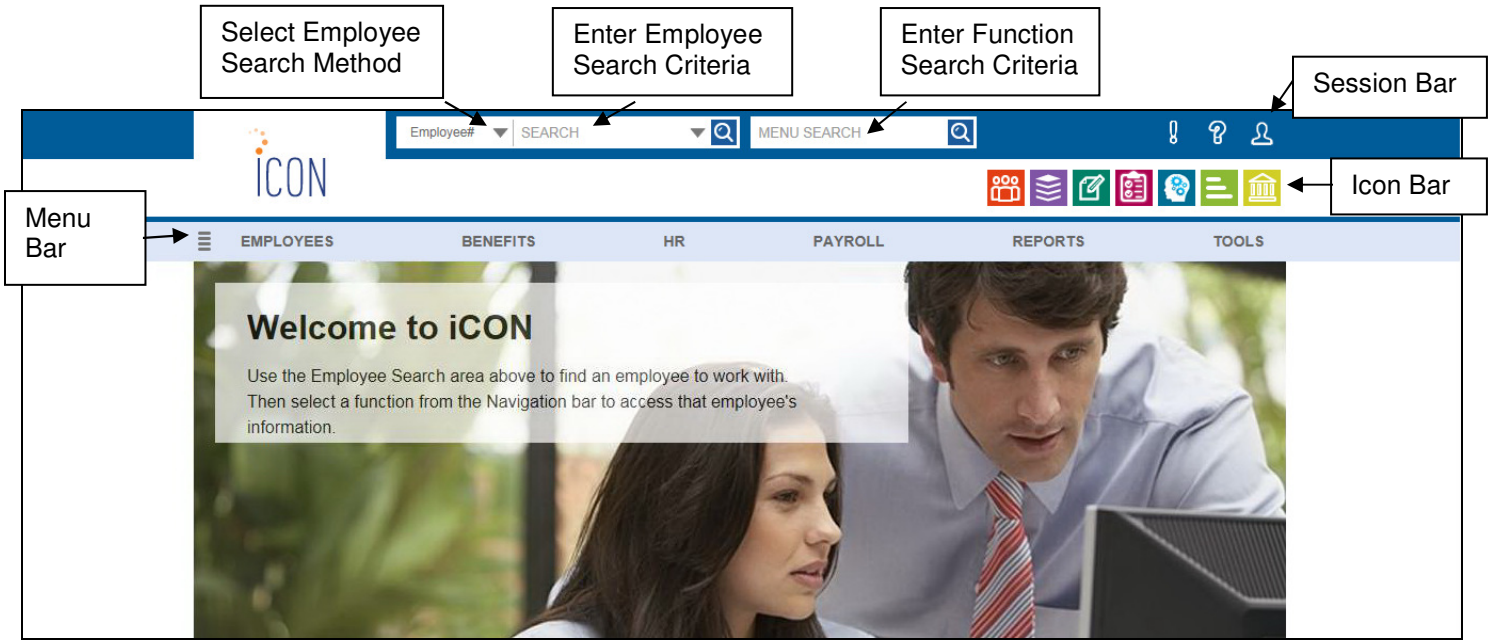
You may use the Employee Search feature to find an employee whose number is unknown. Employee Search options are Employee Number, First Name, Last Name, Preferred Name, Organization and Reports To. From the Employee Search page, you may also elect to include terminated employees, or search by previous last name.

Menu Navigation

The home page 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, 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.



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.

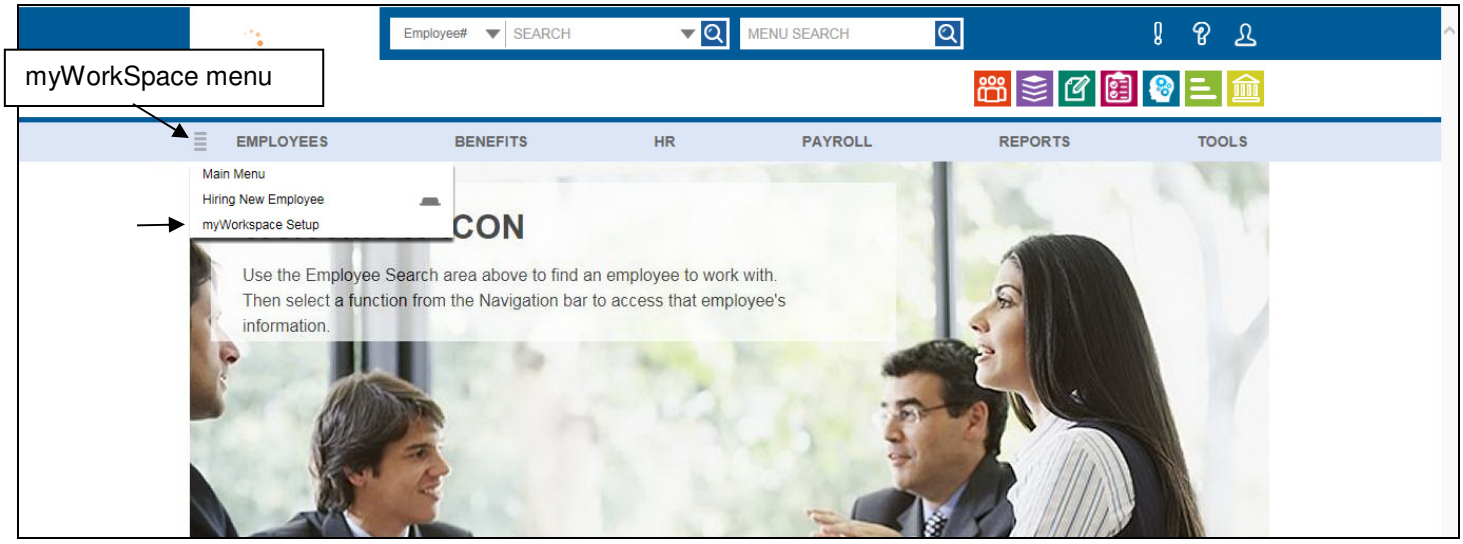
Help: this section will display information about the area of Manager Services from which it is accessed. If you go to another function while the Help window is open, click on Refresh in the Help window to display help text applicable to that function. The following are also available from the Help menu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

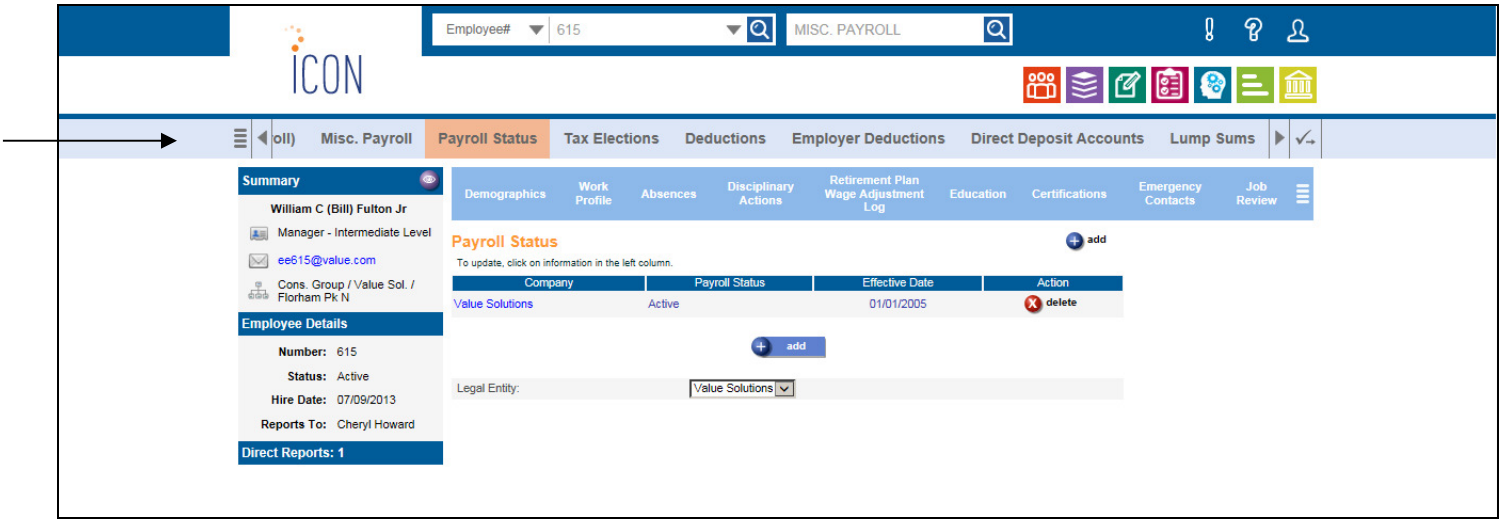
myWorkSpace

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.



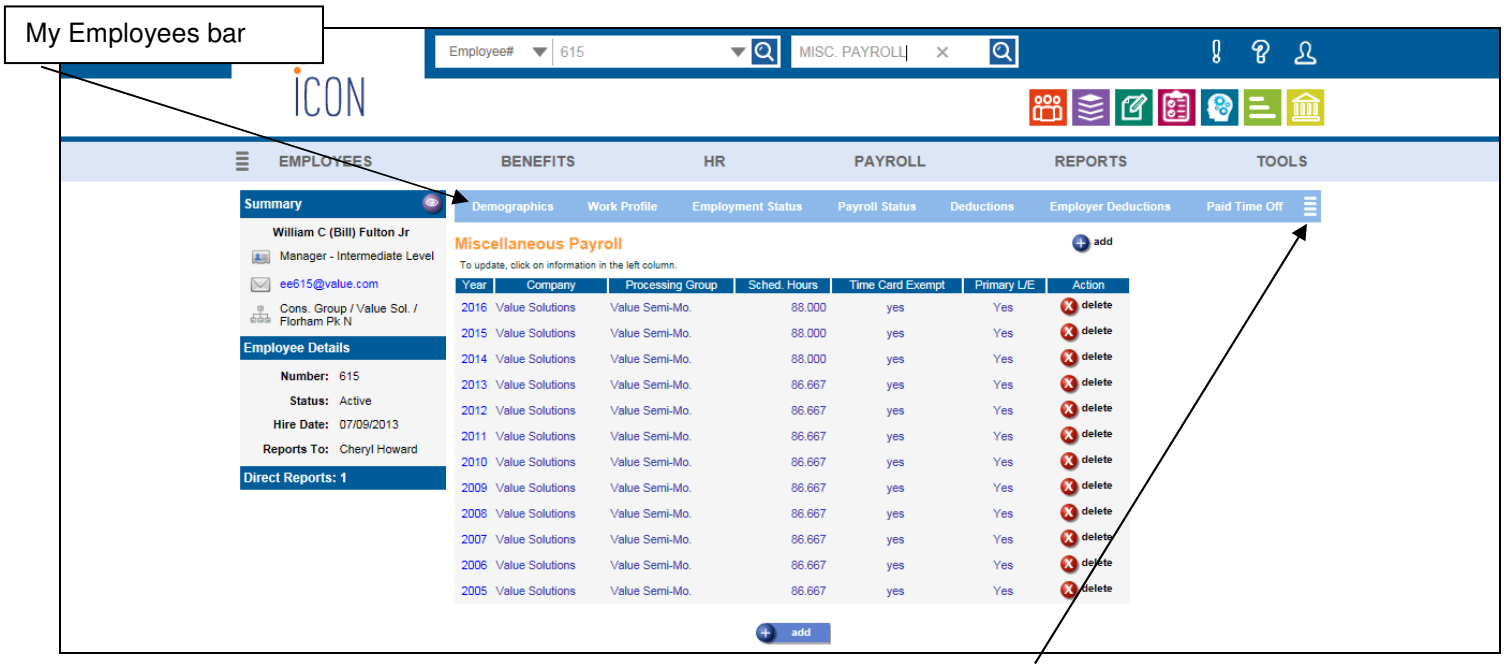
If you access a Workspace, the MyWorkspace bar will appear in place of the Main Menu. You may click on the left arrow to scroll left, or the right arrow to scroll right. At the right of the MyWorkspace bar is a checkmark; click on this to advance to the next function.

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

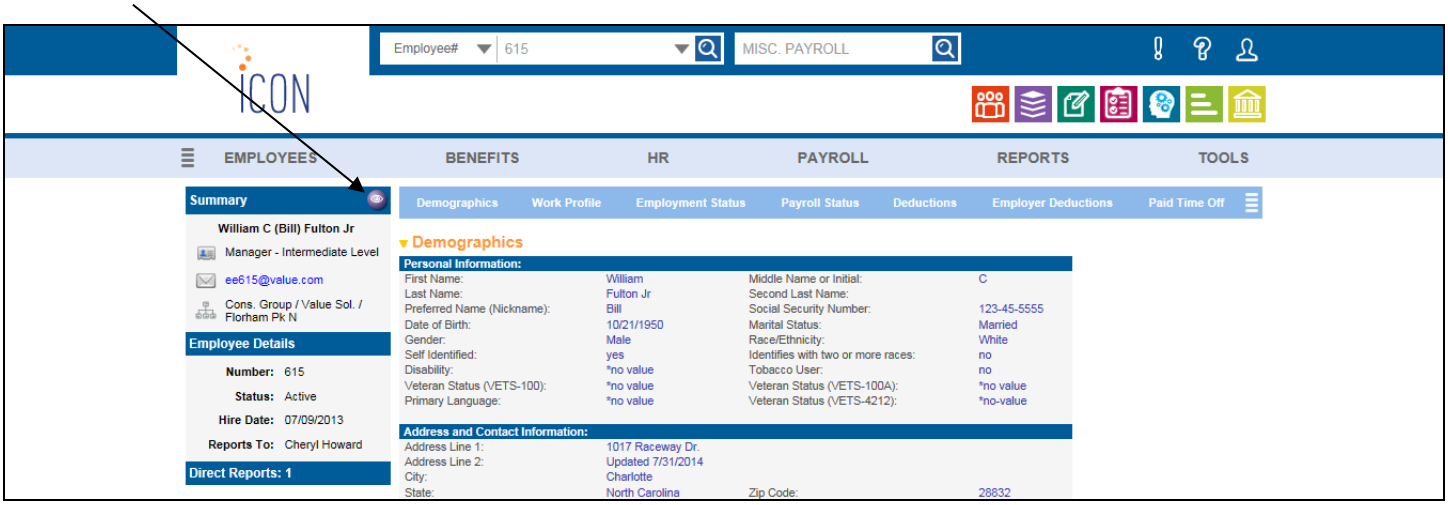
If you wish to show a list of commonly used functions beneath the main menu bar when you are accessing an employee-related function, you may define them in My Employees Functions. By doing so, the functions will be shown as links in the My Employees bar; you may click on any of these to quickly access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



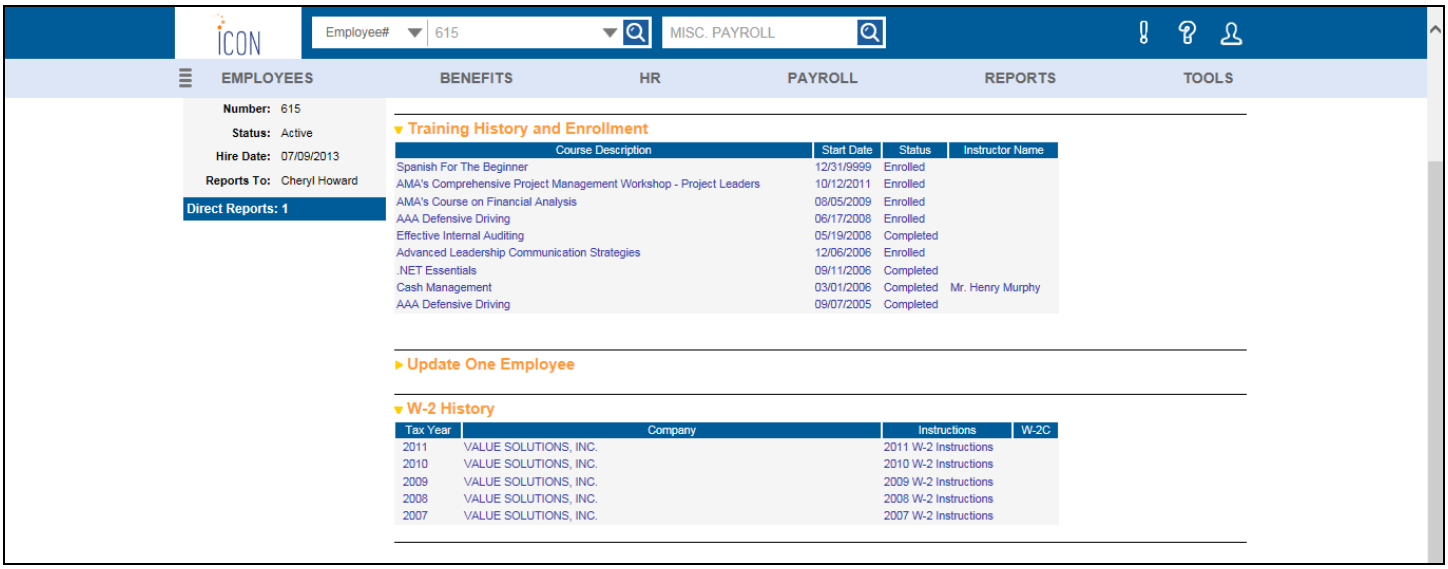
If you have selected more functions than can fit on the My Employees bar, four horizontal lines will appear on the right of the bar; put your mouse pointer over this area to access the remaining functions.

Employee Overview Functions

Another way to quickly view commonly-used employee functions is to set them up in Employee Overview Functions. You may select up to four functions. If you do so, an Employee Overview icon will 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:



Logging Off

Put your mouse pointer over the User icon in the upper right corner. Click on Log Off.

Time-Out

Note that Manager Services includes a “time-out” feature. Typically, this is set at 20 minutes. If you do not perform any action or mouse click after the set time, the system will display the Sign On page the next time an action is attempted.