



Unicorn HRO

User Process Organization (UPO)

A user has the ability to link functions together via the use of a User Process Organizer (UPO). This can be useful when a person normally works with a few functions that make up a business process. For example, if when hiring a new employee, you add the employee's name and address (Personal Data), enter his/her documents listed on the I-9 form (Employment Eligibility), hand out benefit enrollment forms and W-4 form (Forms Distribution), and then assign a company identification card (Employee Property), you could set up a UPO that will step you through these functions, in the order that you do them. Another example of a UPO would be several functions that you wish to run at once, for example a group of reports that are run at month-end.

When a UPO is created, it will be represented by an icon, with a user-specified function title. When accessed, it will run the pre-selected functions, in the order they were selected. A user may continue on to the next function within the UPO, or exit the UPO entirely. You are not forced to continue through each function if you decide to exit the UPO. As an alternative, you may choose the "Run All At Once" option, in which case all functions will run simultaneously.

To add a UPO:

- 1) Go to the window where you wish to add the UPO. When it is created, the system will add it to your current window, or "Parent Group". (It can later be removed from the window and added to a different one.)
- 2) Click on File in the menu bar. Select Create User Object. The "Add User Object" window will appear.
- 3) In the "Process Object Name" field, enter the title for this UPO. It will appear next to the UPO's icon in the window.
- 4) From the list of Available Functions, click on each function that you wish to run during this process. You can select one function at a time or many. To select multiple functions, you can select a range by clicking on the first function, then holding the Shift key and clicking on the last function. You can select multiple individual functions by holding down the Control button and clicking on each function. Click the "<Select" button when you are finished. The functions you chose will appear in the "Selected Functions" box.
- 5) The order of the functions in the "Selected Functions" box will determine the order in which they are accessed. To rearrange the order of the functions you selected, click on a function and use the "Move Up" or "Move Down" buttons to move the function within the list. This can be done with individual functions, or a group of functions (using the click, Shift-click, or Control-click as defined above to select the functions to be moved).
- 6) To remove a function from the UPO, click on the function and then click "Remove>".
- 7) If you want the functions to run simultaneously, click on the "Run All At Once" checkbox. An "X" signifies a "Yes" answer. To run the functions sequentially, leave this checkbox blank.
- 8) Click on Save to store the UPO's definition. If you do not wish to save the definition at this time, click Cancel.

To run the UPO:

- 1) Double click on the UPO's icon. If you selected the "Run All At Once" option, all functions will be submitted. This may cause multiple windows to open. If you did not select this option, the first function in your list of "Selected Functions" will appear.
- 2) Enter/change data on the first function. You will see a "stop light" on the bottom of the window in the button bar. If the window contains an "Exit" button, the stop light will appear immediately to the left of the Exit button. If the window contains a "Cancel" button, the stop light will appear immediately to the right of the Cancel button. The stop light will default to green, and the Exit button will say "Continue". This means that, when you click on Continue, you will be brought to the next function in the UPO. If you wish to exit the UPO without going through the remaining functions, click on the stop light, which will change the color to red. Click on the Exit button (or the "Cancel" button, depending on which type of window you are in) to get out of the UPO.

To update a UPO:

On the window containing the UPO, click once on the icon. Click on File from the menu bar, then Uppdate Item. You will be brought to the Update User Object window. This works the same as the "Add" window. You can add or delete functions from the UPO, or change the order of the functions. Make the necessary changes and click on the Save button, or click on the Cancel button to revert to the previous UPO definition.

To remove a UPO from a window:

1. Access the window where the UPO is located and click once on the UPO icon.
2. Click on File in the menu bar. Click on Remove Item. This will only remove the UPO's icon from this window; it does not actually delete the UPO's definition.

To add an existing UPO to a window:

1. Click on File in the menu bar. Click on Add Item.
2. Within the next box that appears, click on User Object. A window will appear entitled "Select a User Object to Add." Click on the UPO you wish to add to this window, and then click on the Select button. You may click on the Cancel button to exit this window without making a selection.

To delete a UPO:

1. Make sure that the UPO is not included in any of your windows. This process actually deletes the UPO and its definition, rather than just removing it from the current window or Parent Group.
2. Click on File in the menu bar. Click on Delete User Object.
3. A window entitled "Select a User Object to Delete" will appear. Click on the UPO you wish to delete and click on the Select button. To exit this window without deleting anything, click on the Cancel button.

4. You will get a confirmation message to make sure that you want to delete this UPO. If the UPO exists on any window, a message will appear to notify you that the UPO is in use as part of a Parent Group.

To move a UPO from one window to another:

1. Access the window where the UPO currently exists. Follow instructions above to “remove a UPO from a window”. (Make sure you don’t delete it.)
2. Access the window where you wish the UPO to be. Follow instructions above to “add an existing UPO to a window”.