B2E SOLUTIONS

Connecting business to employee

Time & Labor, Human Resources and Payroll User Guide

EMPLOYEE

Contents

Overview & Navigation

About this Guide

Menu and access options are determined by your security level and the software modules that are enabled on your system.

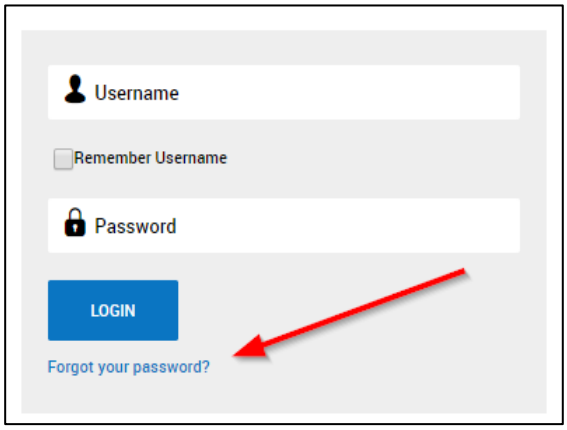
Important Note: The images are examples only and may not match your screens due to configuration differences between our Demo Company and your company. Some users will have more options and some users will have fewer options than what is shown.

Log In

To log into Workforce Ready, do the following:

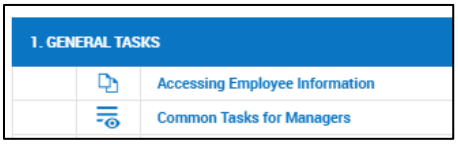
1. Point your web browser to the URL provided by your administrator or…
    a. www.b2esolutionsinc.com, and click Workforce Read Login in upper right.
    b. Enter your Company provided by your Manager or Company Admin
2. Enter your username and password and click Login.
    a. Your Company Administrator will let you know your Username and PW.
    b. The system will prompt you to change your password on first login.
    c. Password must contain Capital Letter, Lower Case Letter, Number and Symbol
        i. Example: Password1!
        ii. Please reference additional user guides on Virtual Code Authentication (VCA) and Password Security in ***My Info > Help > My Learning (Classic) > Employee > 1 Navigation Overview items***, which is also required for login.

- **1st Login: After you change your password,** you will receive a screen to Configure Virtual Code (Authentication) Settings (VCA) for text, voice, and email. **Be sure to update** these fields on first login for future use. When you login using different computer/browsers you will go through VCA using one of these updated contacts.
- **You will be locked out after 5 invalid attempts at your password. Contact your Manager or Company admin if you need to be unlocked.**
- **Did you forget your password? Try the "Forget your Password?" hyperlink below the password box and reset it on your own.**



Additional Help

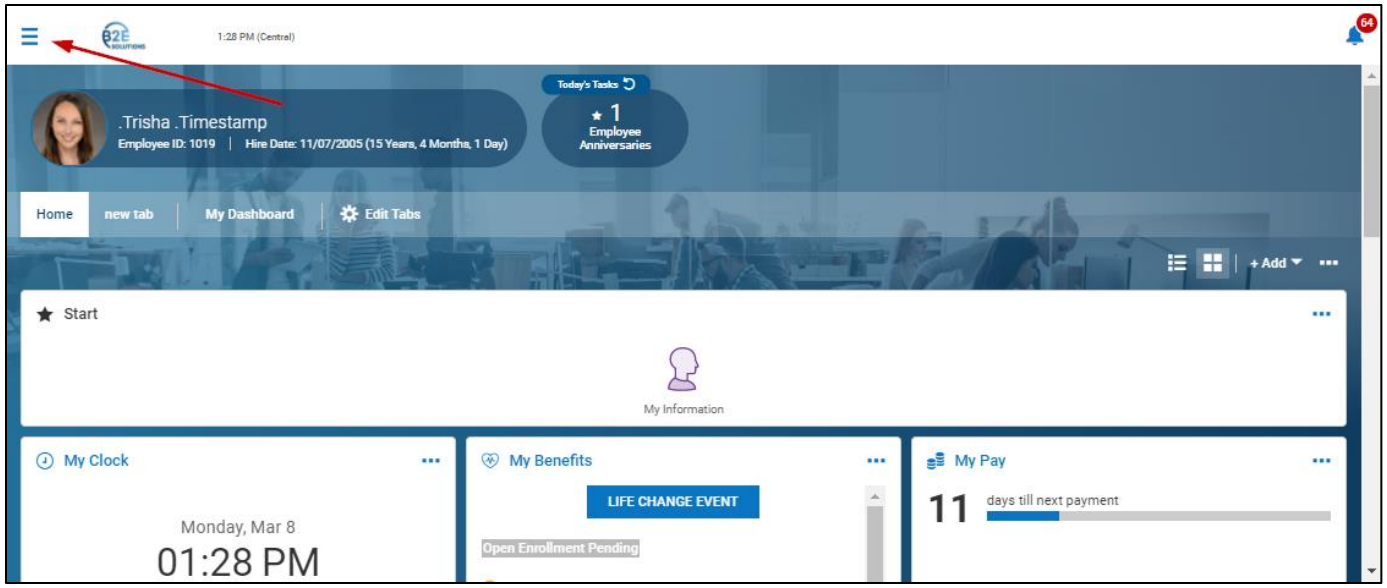
Once logged in you will find additional user guides and training webinars by going to ***My Info > Help > My Learning (Classic)***... Within these menus, you can download short topic specific Job Aides and Interactive Video's* for additional tutorials on items in this guide and more. **Video's work best in Internet Explorer.*



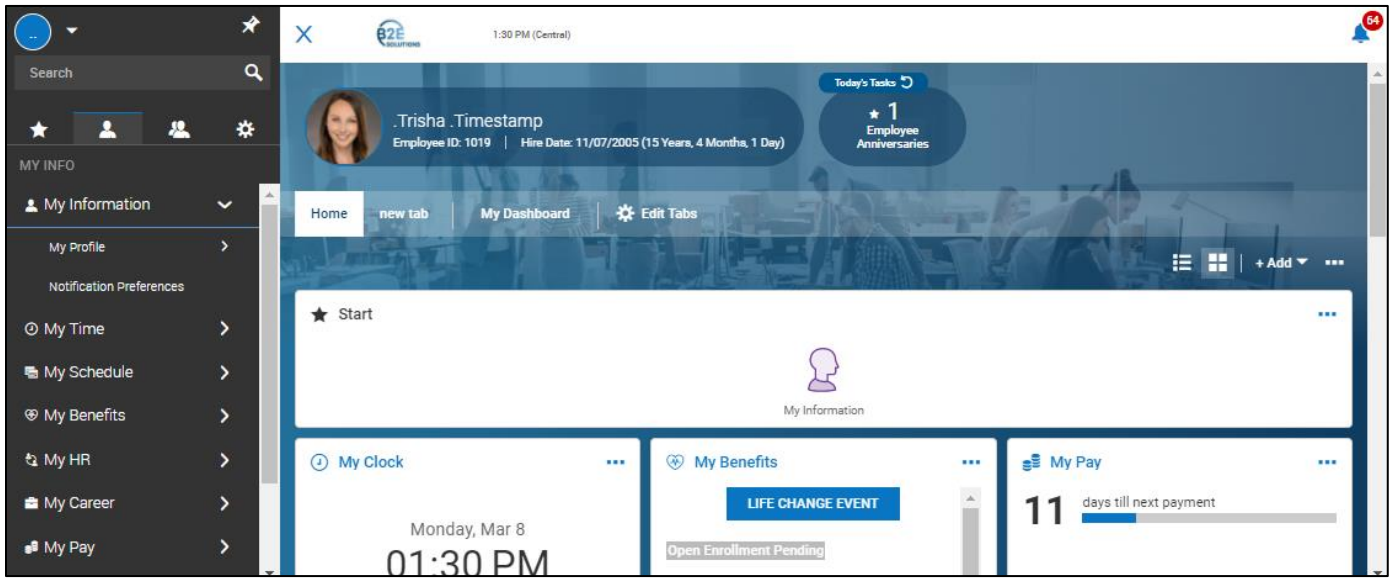
Simple Navigation

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

Navigation through the menus is easy. A menu is accessible from the "hamburger icon" in the upper-left corner of the application. After navigating to an option, the hamburger menu will slide out of view while you work. To return to your menu, simply tap the hamburger icon again and the most recent navigation menu path selected will display again.



After tapping the "hamburger" menu icon, and navigating to the desired page, the menu is pinned; the next time you open the hamburger menu it automatically opens to the last selected path.

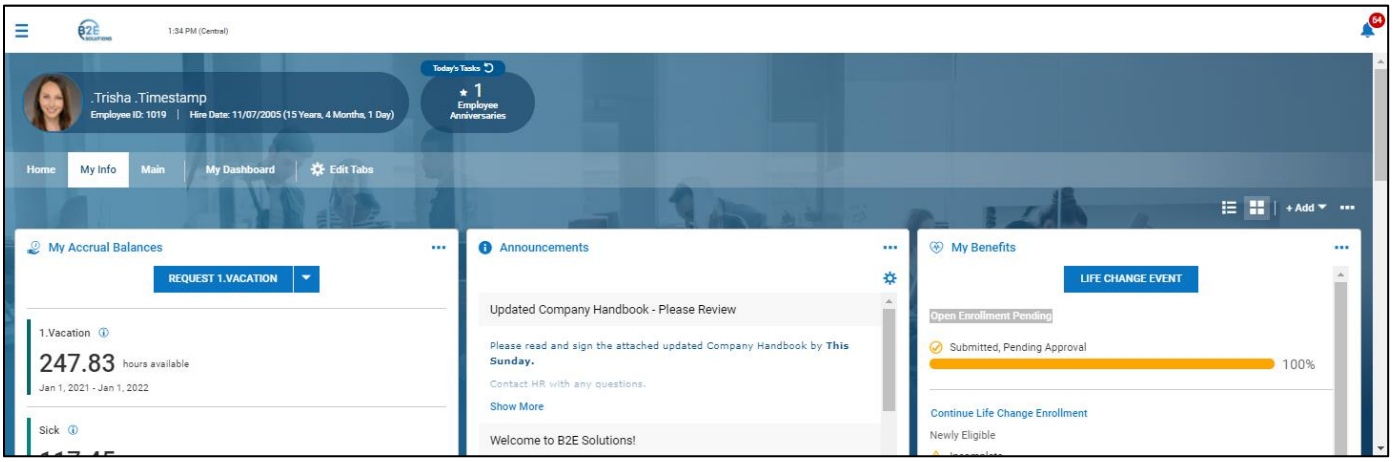


Home View & Widgets

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

After logging in, the Dashboard or landing page will display. Your company may have information on this page, such as a welcome message or announcements. Today's date/time will display and depending how your system has your time entry function configured, you may be able to view your timesheet, register a simple punch, punch in, punch out, or register a transfer punch.

Your company may have other options, or widgets on your dashboard such as Announcements, My Benefits, My Pay, Timesheet Chart, Accrual Balances and Time Statistics. Many of these options contain hyperlinks that will allow you to view and perhaps take certain actions.

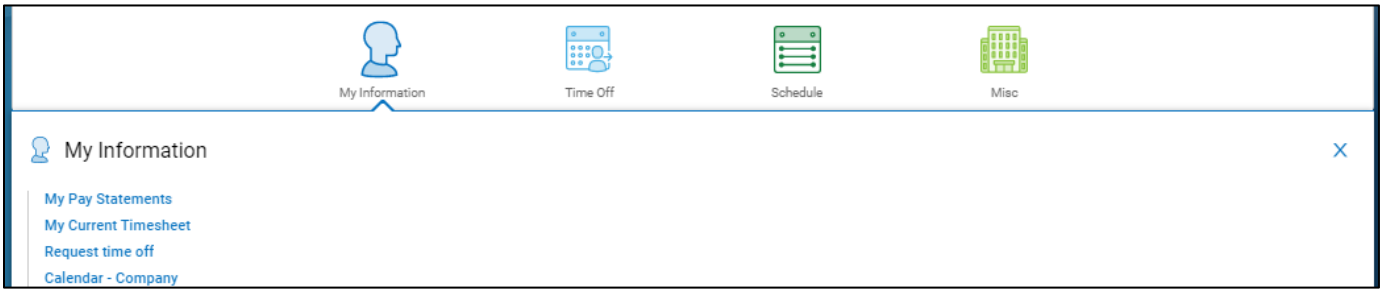


Start

This widget will display the Favorites menu across the top of the user's session. The *Start Widget Configuration* page, located under ***Favorites > Configure Favorites***, can be accessed by users so they can customize their widget. They will have the capability to add a unique color and an icon to each Category for the Start Widget. Or, a Start Widget can be added to security profiles and users will inherit the dashboard set there.

- The *Default Start Widget* in security profiles is used to give users assigned to the profile the ability to modify the Start widget. It is also editable by the employee by clicking on the action icon in the upper right corner.

For additional help on this, go to ***My Info > Help > My Learning (Classic) Employee > 1 Navigation Overview > Favorites Menu & Start Widget Setup****.*

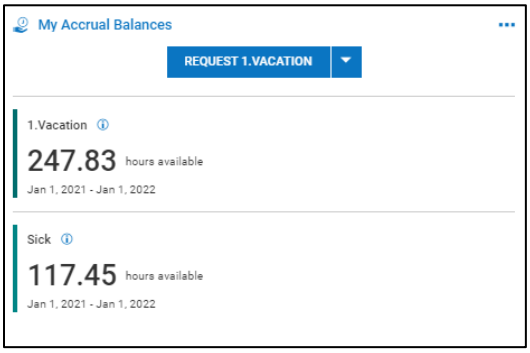


Accrual Balances

Displays the user's current accrual balances. Info icons are available for each category and a pop-up will display more details.

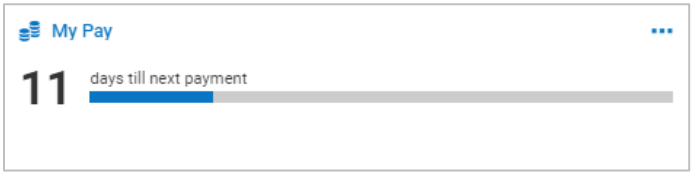
If no Accruals Profile is assigned to the user, the Accruals widget displays a message indicating they do not possess an Accruals profile. If the Accruals profile contains no

rules/policies that include at least one bucket such as Vacation, the widget displays a message indicating such.



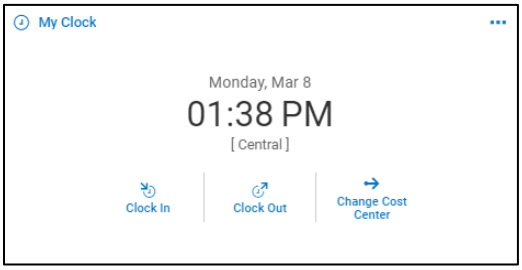
My Pay

In the *My Pay* widget, you can see a countdown until your next pay. By tapping the View Pay History hyperlink, you can view your pay history, and if authorized, you can view and possibly add direct deposits. An e-signature agreement is located here to allow you to agree to receive your pay statement electronically.



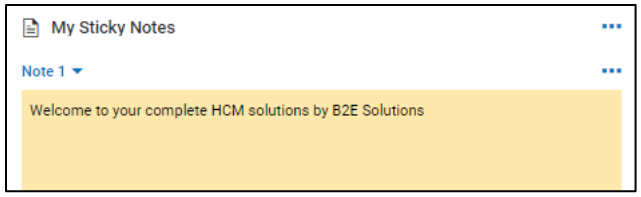
Clock

If your company requires you to clock in/out, you can do so from this widget. This widget will display the current date/time/time zone. A hyperlink for your timesheet is available here, as well as options to allow you to quickly clock in or clock out, as well as perform job transfers through the Change Cost Center option. The options shown here may differ from how your company has your Clock widget configured.



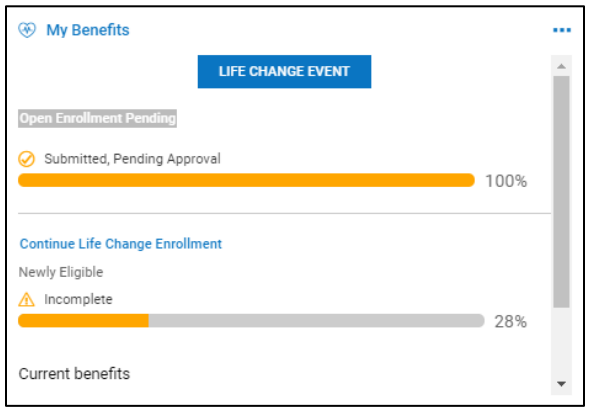
Sticky Note

Allows users to add notes for quick reference. Up to 10 notes can be added and the color of each note can be edited. This sticky note is unique to the user.



My Benefits

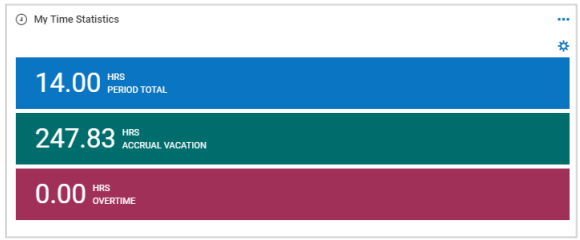
In the *My Benefits* widget, you can view your current benefit plans, and when available, you can enroll in benefits during an open enrollment period, or to process a life change event.



Tap the *View Benefits* hyperlink to be taken to the page containing your existing benefits and enrollments. Tap the Back arrow at the top of your session to return to the home page, one page at a time; or you can tap the hamburger icon and tap the Home icon.

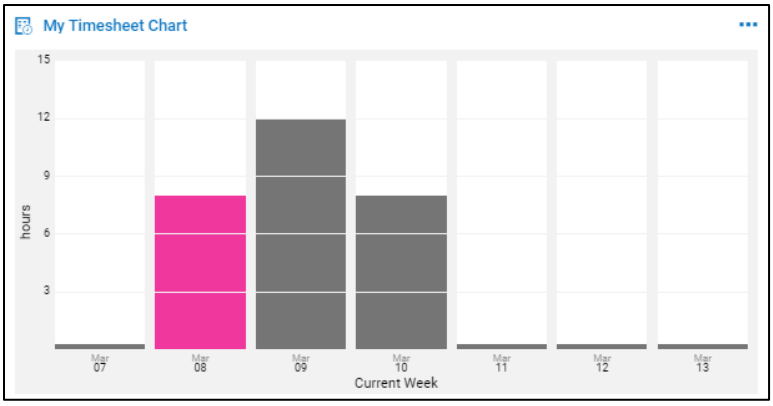
Time Statistics

The Time Statistics widget will display your current balances for the type of time shown. The data will update automatically as time is added to your timesheet, or accrual balances are used.



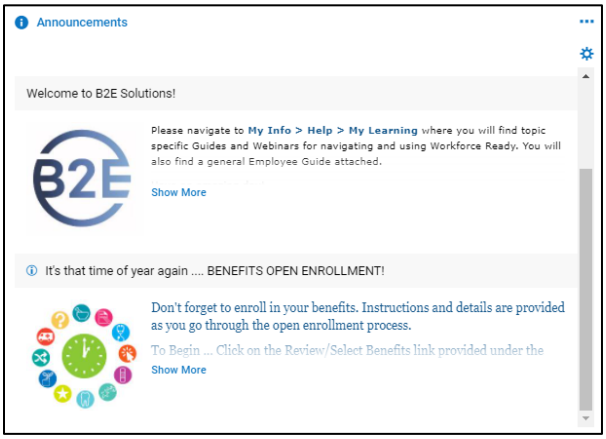
Timesheet Chart

The *Timesheet Chart* widget will display, in real time, your total hours for each day of the current week. The current day will display as highlighted. The data will update automatically as time is added to your timesheet. Clicking on the date will take you directly to your timesheet.



Announcements

Your company may place special announcements on your dashboard. You can view these by tapping on either the Info icon or the arrow. To close the announcement, tap the X or tap Close.

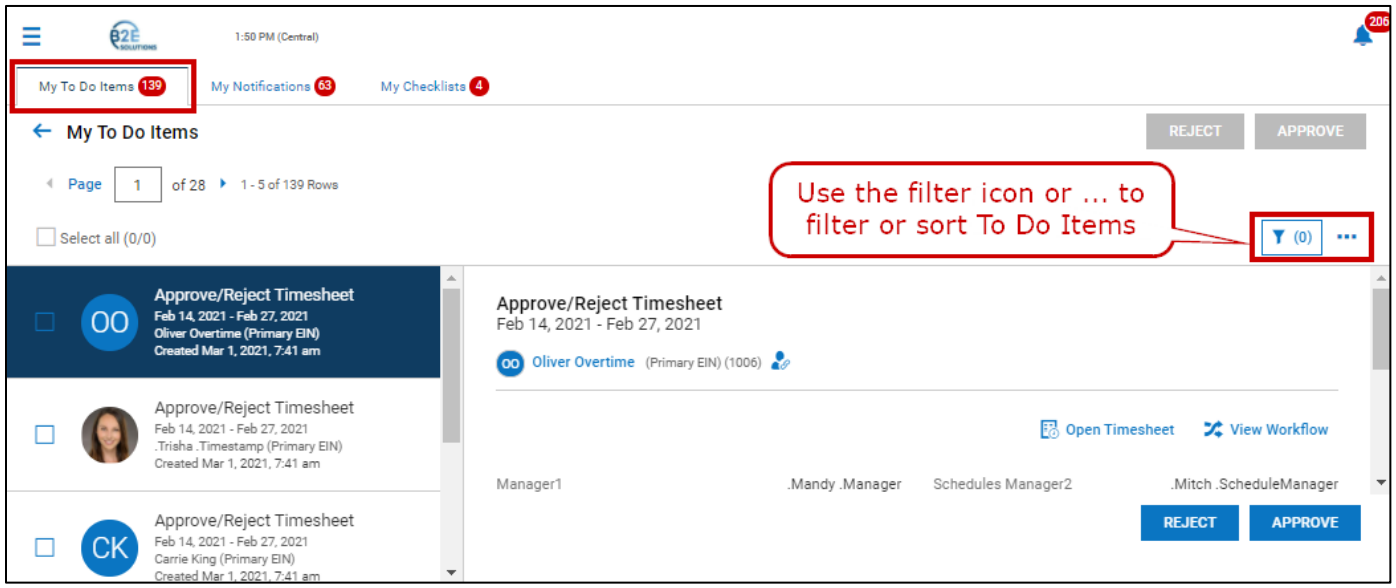


My To Do Items, Notifications & Checklists

The bell icon is the user's system Mailbox and will display any notifications (system generated emails) or To Do Items. Tap the bell to open the mailbox view any actions requiring your attention. This icon can be used at any time, within any menu. To return to the page you left, tap the Back arrow to return. Each tab contains a *Refresh* option, *Sort* option, and *Filters* to help shorten the list and return certain types of requests or notifications.

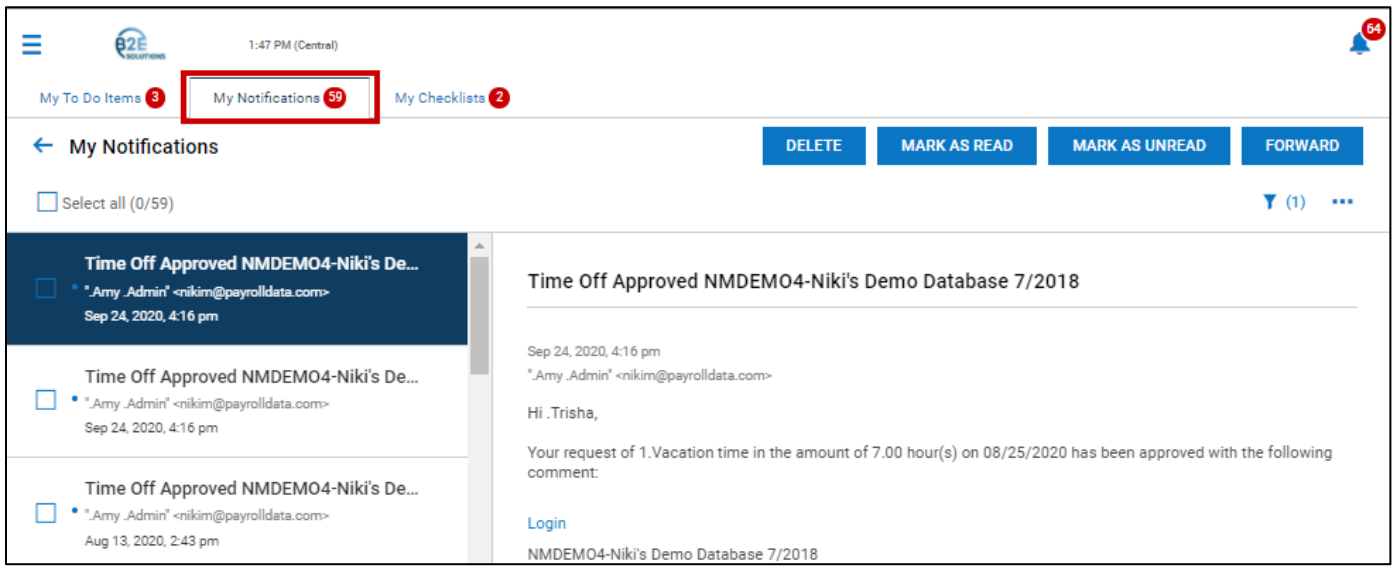
My To Do Items

Under the *My To Do Items* tab are items requiring your attention. Pages containing links to additional information, forms or buttons can be used to complete tasks. A warning message will display to users who either do not have the proper permissions to work with the To Do Item, or to inform the user if the workflow configuration is incorrect.



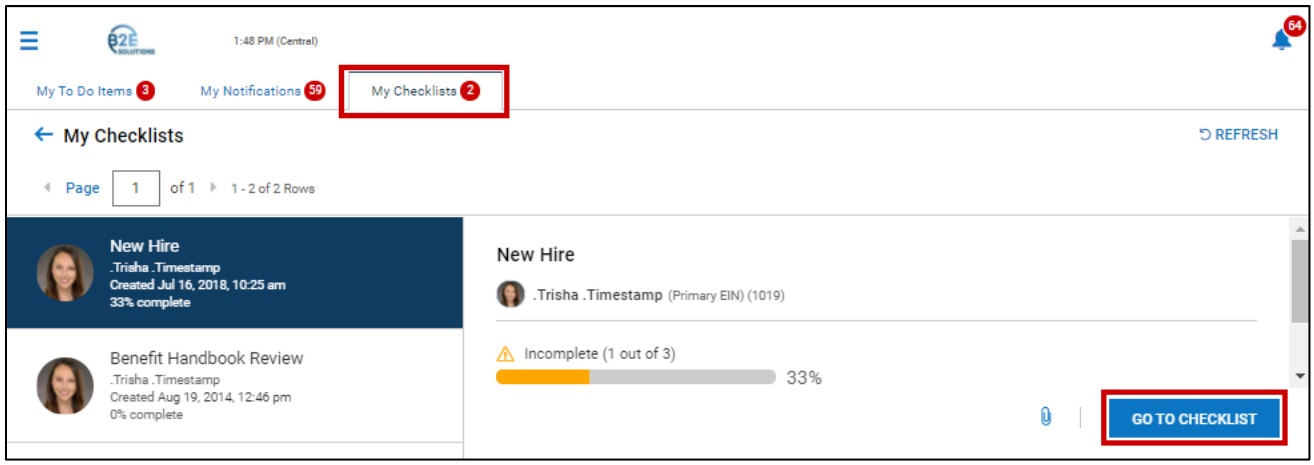
Notifications

Under the *My Notifications* tab, any emails generated by a system notification will display here. This tab contains multiple icons to process the notifications.



My Checklists

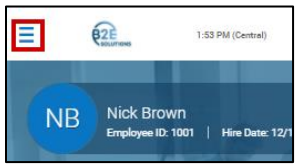
The *Checklists* Items with My To Do will automatically add any checklist items requiring the employee's attention. A number will display indicating how many items are under the tab. Users can view the item in their list and then select the *Go To Checklist* button to open the checklist and view and/or edit the checklist details.

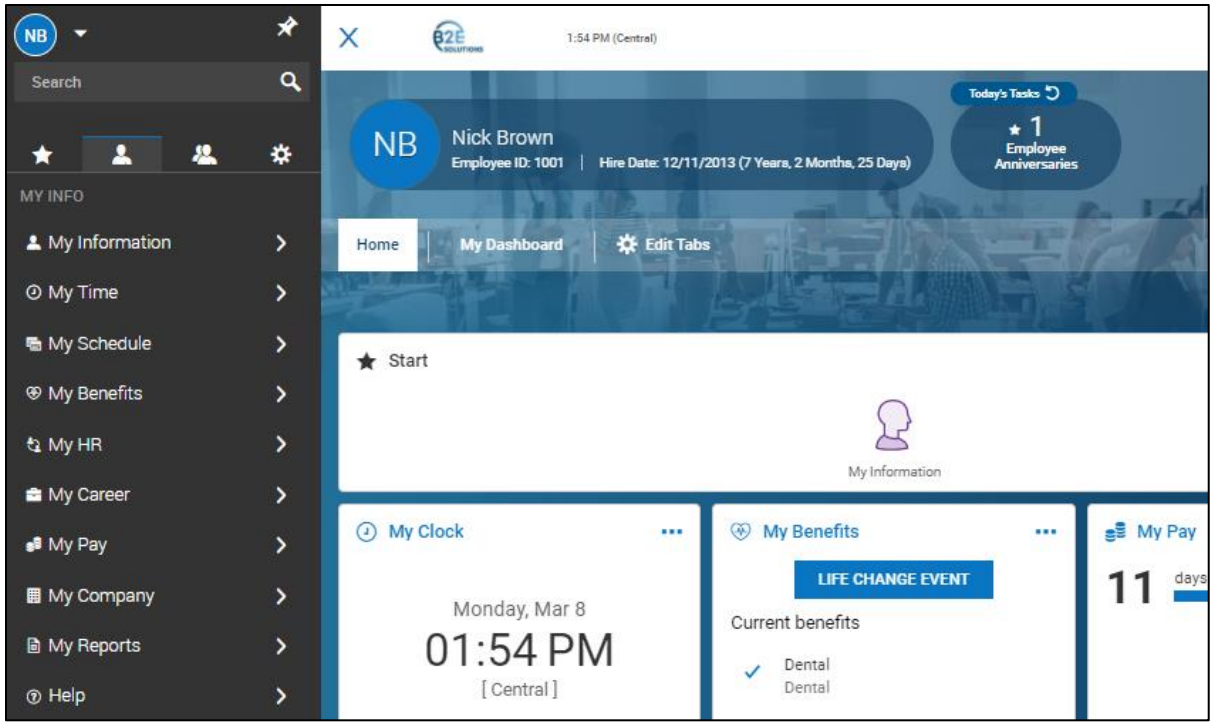


Global Navigation Menu

For additional help on these topics (and more), go to ***My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

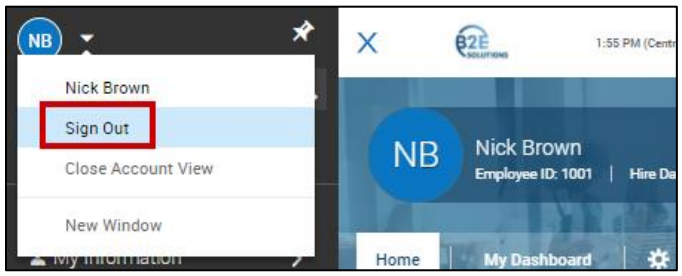
The "hamburger" icon at the top left of your session can be clicked to open the menu containing all pages that have been configured for your experience. There will be settings such as your *Home* icon, your *Settings Gear* icon, your *Sign Out* link, and other menu options. This menu can be accessed at any time, within any menu. You can also swipe to the right to activate the main menu, though this may vary by device. Once active, it can be closed by tapping the X in the rolled-out menu.





Sign Out

Tapping the *Sign Out* link will log you out of your current session and return you to the Log In page.



Navigation Bars

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

Each page in the Time & Labor Module contains a navigation bar that provides buttons for performing actions specific to that area of the software. Always use the navigation bar buttons along with the Time & Labor Module menu options to navigate throughout the application, rather than the **Back Arrow** offered in your web browser.

Common Icons

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

Icons, controls, and links are frequently used to display pages containing additional information or requiring additional action on the part of the user. These commonly used elements are described below.

- Your company's logo icon will appear in upper left of scree. When tapped it will take you back to your login screen.

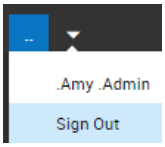
- The "hamburger" icon is a horizontal triple stacked line. When tapped, it will access your main menu.

- The back arrow will take you back one page at a time.

- The bell icon is your link to My To Do Items, My Notifications and My Checklists. The number indicates how many items are to be completed or unread.

- The picture (your picture), when tapped, will open your profile. If a picture has not been uploaded, your initials will appear here instead.

- The Sign Out link, when tapped, will allow you to link to "My Profile, sign out of the applications or open another window to have multiple sessions going at one time. If sign out is not used, your session will time out according to the number of minutes set by your company.



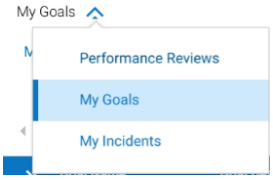
- The Star icon, when tapped, will show your Favorites. They can be configured to show your most commonly used items. These items can also be show on your Home Screen Start Menu.

- The single employee icon contains My Info menu options enabled by your company.

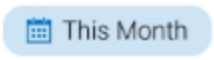
- The multi-employee icon contains Team menu options for managers and supervisors.

- Tapping the X in the upper right corner of the main menu will close the main menu and leave you on the currently selected page.

- When navigating through pages in the application, the chevron icon, when tapped, will display other menu options that are available. You can tap any of the items under the icon and navigate to that area.



- Any page with a calendar indicates that the dates can be changed. Tap to open the calendar and select a different date.



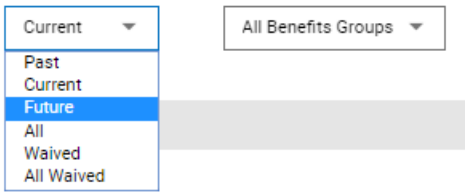
- Any page with the funnel icon indicates that filtering criteria is available. Tap to open the filter settings and make a selection to change the data shown. A number next to the icon indicates the number of active filter settings.

- The triple dot icon known as the Actions menu (infinity icon), indicates more options are available. Tap the icon to view and select an option.

- Active links will display in blue, and links with drop-down arrows indicate there are additional options. Tap to view and select.

- The Edit Information link will display when your company has authorized you to edit information for the selected page.

- Drop-downs will display a list of options in a browse list on your application where you will make selections. This will also display for date selections.

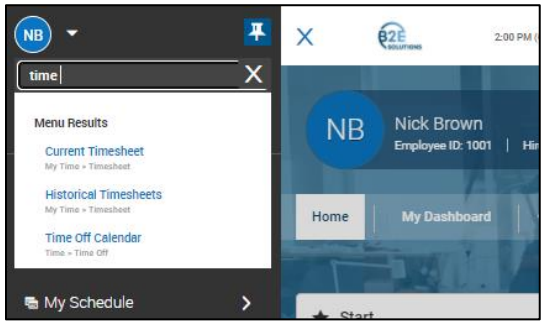


- Minimize and Maximize Icon, when tapped will expand or contract the selected widget or box.

Search

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 1. Navigation Overview***

There is a Search Bar within the system that allows you to search for items throughout the system. This field will allow you to search for configuration pieces that are clickable, as well as specific employees (by name, Id, or badge).



The system will also remember recent searches that were used when you use the field.

You will only be able to search for items based on your Security.

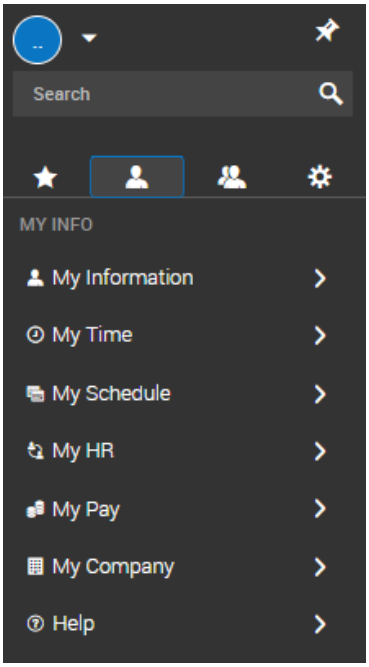
My Info - User Experience

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks >***

The following contains options that can be enabled for all users, whether an employee or a manager. These are items that fall under the My Info menu (the single employee icon). These are options that affect the individual user, or are options granted to the individual, such as a user's timesheet, schedule, benefits, direct deposits, pay, and more.

This section discusses the user's experience when those options have been enabled and may include sub-systems your company may not have enabled. Not all options shown will be available to you depending on your permissions. In some cases, additional information is provided for certain functions.

From the hamburger menu ☰, the default view for the user will be the My Info options.

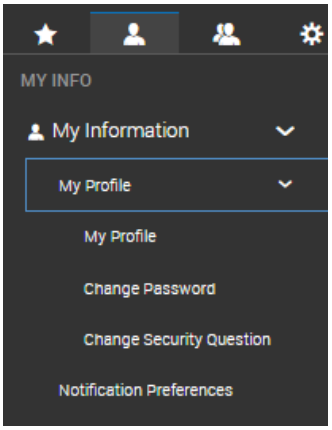


My Information

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks >***

Under the My Information menu are options to access your profile, your contacts and set your notification preferences (if authorized.)

- **My Profile** – Under your profile, you can view your account information, and if authorized, edit certain types of information. Options under here can include your basic information within the Employee Information widget, Contacts, Touch ID authentication, Account Demographics, Account Information (name, locale, time zone, username, nickname, security question), Cost Centers (your default cost centers), Base Compensation, Managers (your manager(s)), Dates (hired, re-hired, seniority, start date, Skills, Scheduled Cost Centers (for use with the Scheduler module) and options to Change Password and Change Security Question.
- **Notification Preferences** – Under this menu, if authorized, you can set how you wish to receive To Do Items and other system-generated emails. You can select to receive notifications in your Mailbox (accessed by tapping the bell icon), or to receive these notifications under your primary email account. Options are also available to set if you wish to be notified of certain types of schedule changes within the Scheduler module.



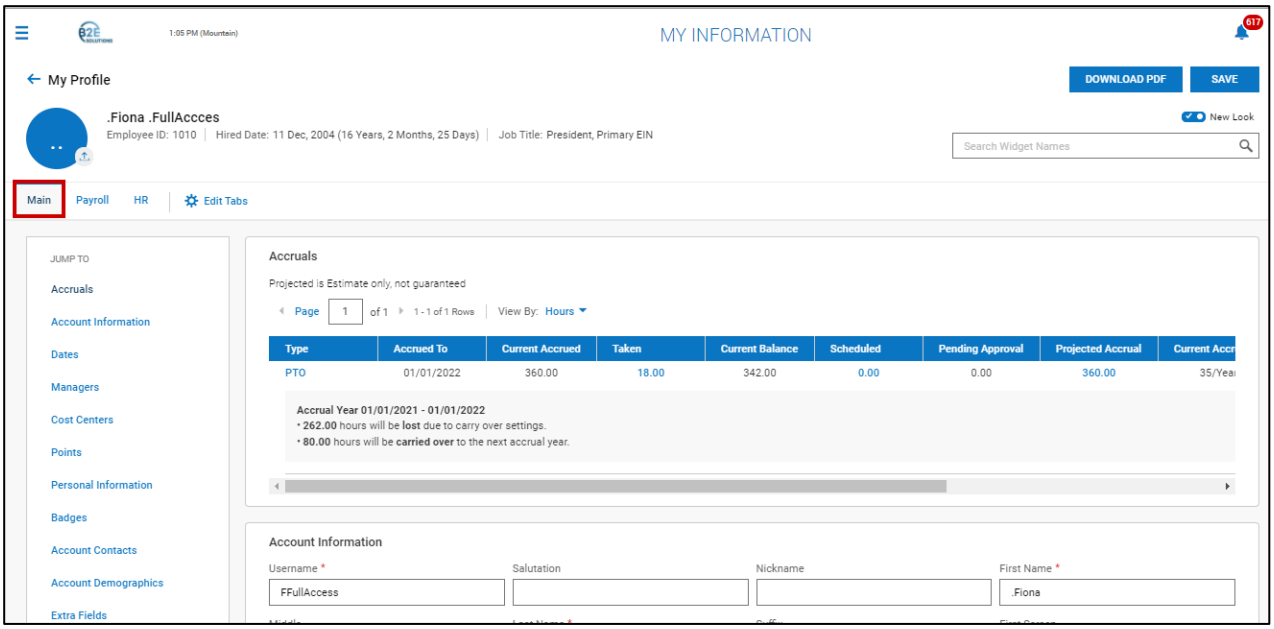
My Profile

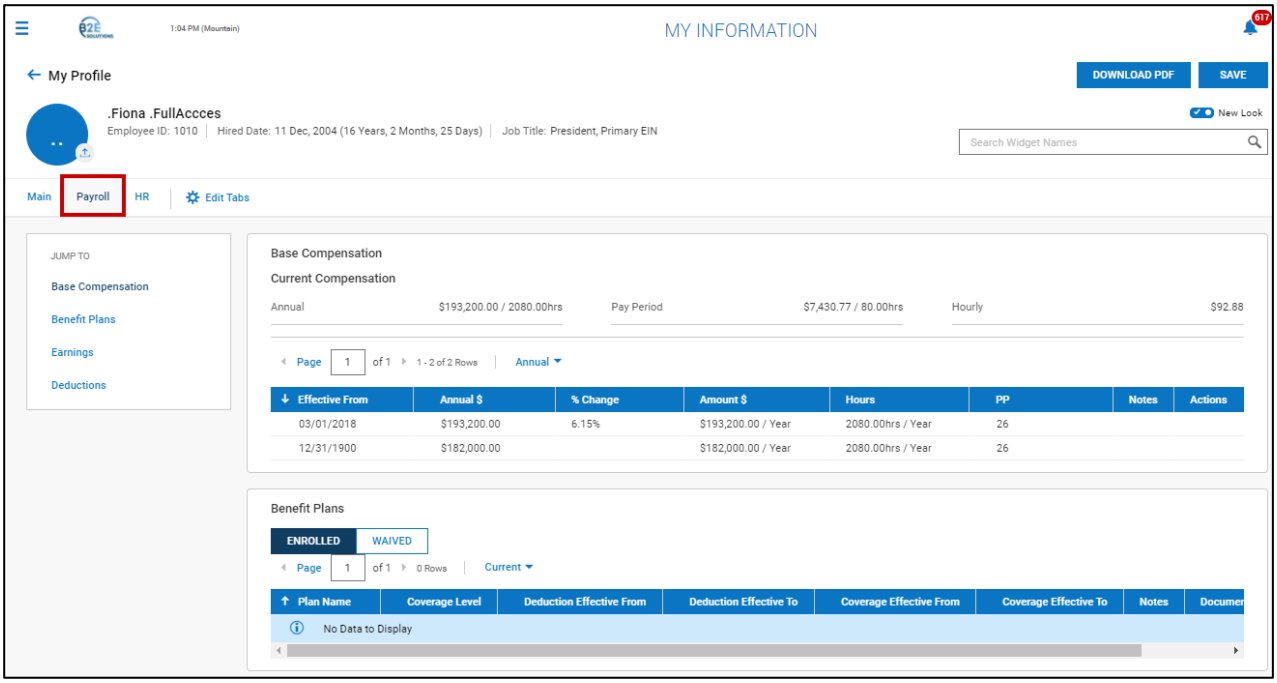
My Info > My Information > My Profile > My Profile

Your company may have some of your personal account information available to you in your profile. To access this information, tap your picture or your name and your profile will open. You may have access to edit some of the information through the *Edit Information* link in each section. Other options may also be available, such as your contacts, and notification preferences.

1. After you have logged into the system, Click on ***My Info > My Information > My Profile > My Profile.***
2. You will be presented with your basic information your company has chosen to store & display.

3. The **Main** tab includes your basic employee & HR information.
    a. Here you can review, and update enabled information, contact info, etc.
4. The **Payroll** tab includes your basic payroll information (Scheduled Earnings & Deductions)
    a. Here you can review Payroll related info such as Base comp, scheduled benefits, deductions, etc.
5. Other tabs may also be available based on your company's setup.
6. Be sure to click Save after you make any updates.





Change Password

My Info > My Information > My Profile > Change Password

To change your password, do the following:

- Use the fields on the Change Password page to enter your old and new password, and then click Save.

Changing Security Question

My Info > My Information > My Profile > Change Security Question

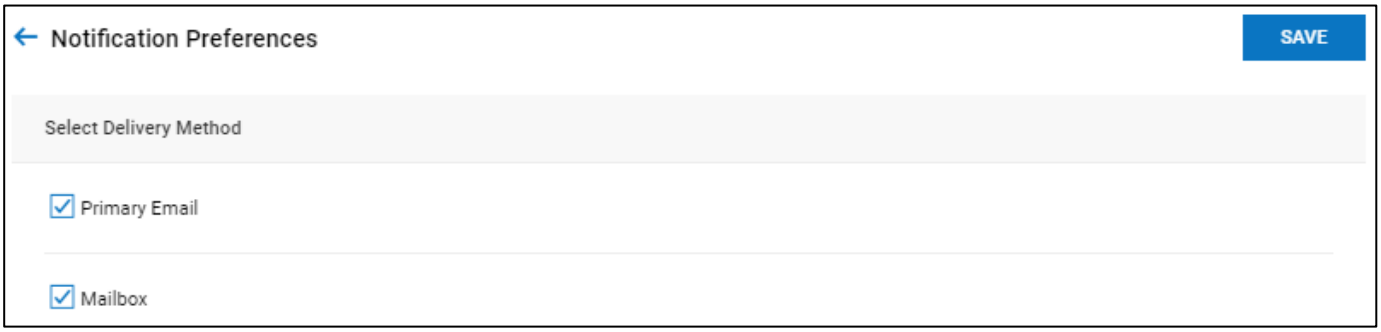
If you change your security question, used to reset Passwords, etc. you can do so here.

- Type in your Password then enter your New Security Question and Security Answer, and then click Change Security Question.

Notification Preferences

My Info > My Information > My Profile > Notifications Preferences

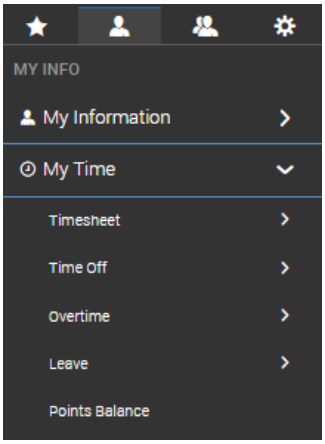
From here you can check/uncheck any notifications you wish to receive. Be sure to click Save after you have made your updates.



My Time

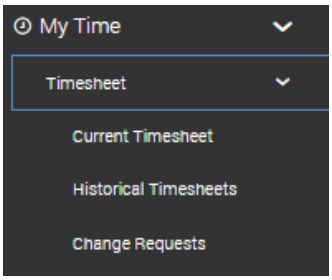
*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks >***

Under the My Time menu, you can access your timesheet, request, and manage time off requests, view schedules, request and manage overtime requests, and more. Remember that your options may vary from the examples depending how your company is configured.



Timesheet Menu

The Timesheet menu contains options for an employee to view/edit their own current timesheet, historical timesheets, and if authorized, create and submit a timesheet change request.



Timesheet

My Info > My Time > Timesheet > Current Timesheet

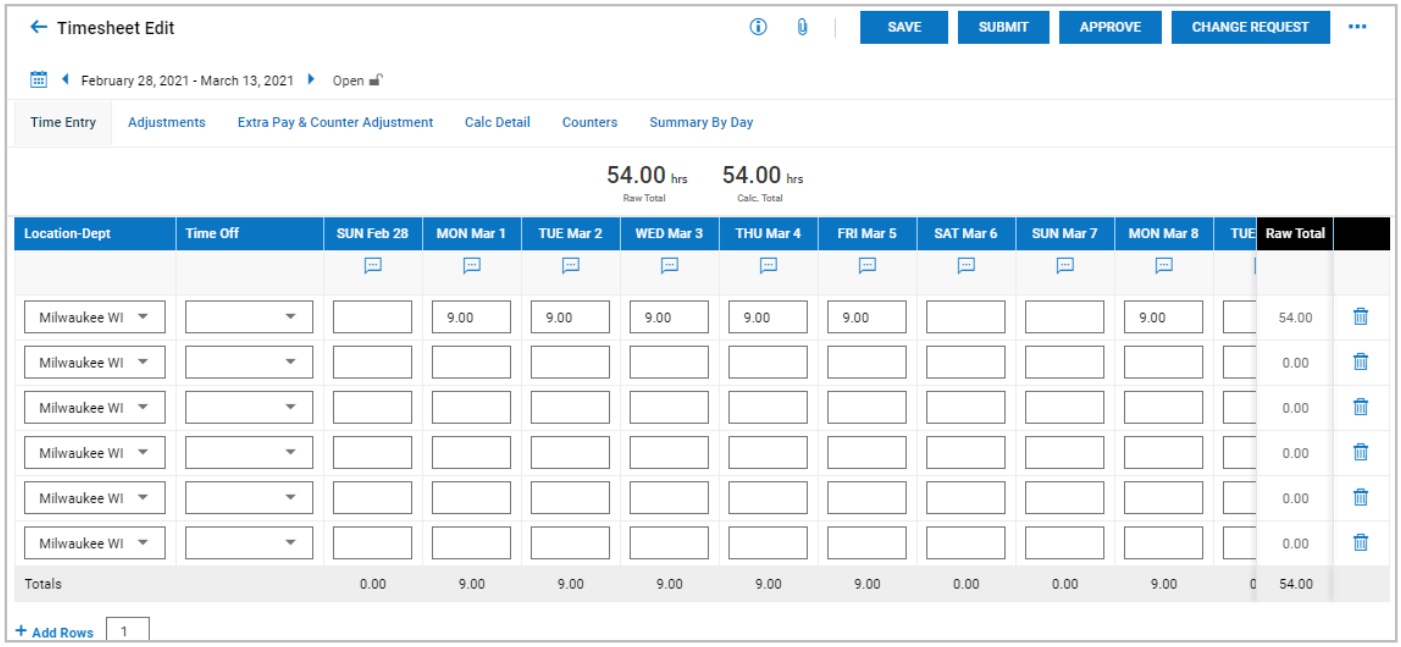
Your system administrator or manager has assigned one of these timesheet formats to your user account. This section describes how to use each timesheet format. Follow the instructions pertaining to the timesheet format you have been assigned to use. There are four possible default Timesheet Profiles are provided in the system.

1. Bulk Hours – HCMtoGo Compatible
2. Start/End (All Days) – HCMtoGo Compatible

NOTE: Your timesheet view may vary slightly based on the options enabled for your company. Please see your manager if you have any questions.

Bulk Hours

This timesheet allows you to enter time records in bulk amounts without specifying exact start and end times. You can also indicate the cost center you worked on for each bulk amount of time entered in a day.



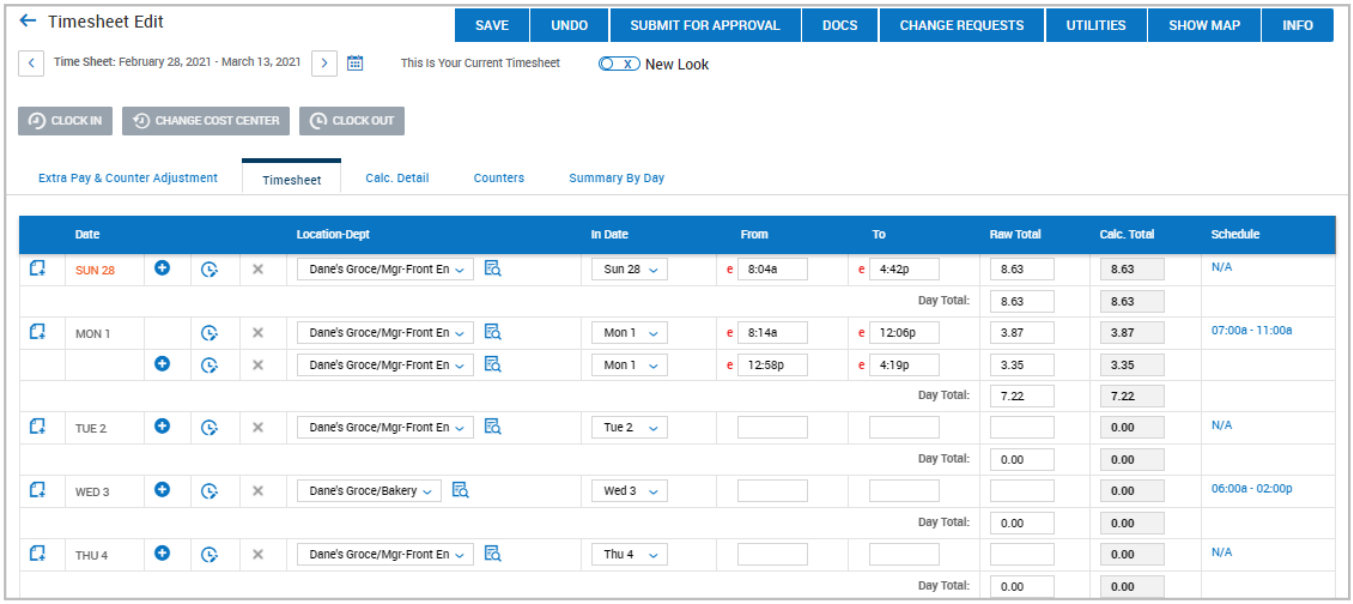
To record time entries in a Bulk Hours timesheet, do the following:

1. The timesheet will open to the current pay period and display the entire pay period under the *Timesheet* tab.
2. Use the first available cost center field and select the task in which you worked. If necessary, click the Lookup Icon to browse to select a cost center or Time Off.
3. Enter the amount of time worked in this cost center in the corresponding text field, for the correct date.
4. If enabled, the tabs across the top of the timesheet may be used to view your time entries in detail or summary view. You may also be able to view your schedule.
5. Continue entering time records as appropriate. If necessary, use the *Add Rows* button to add more cost center rows.
6. Use the buttons at the top to *Save*, *Undo*, and *Submit For Approval*. If enabled, the *Utilities* button will provide links that will list information about your account, time offs, schedule, and allow printing. If enabled, the *Info* button will provide links and information about the profiles to which you are assigned.
7. Click the *Save* button.

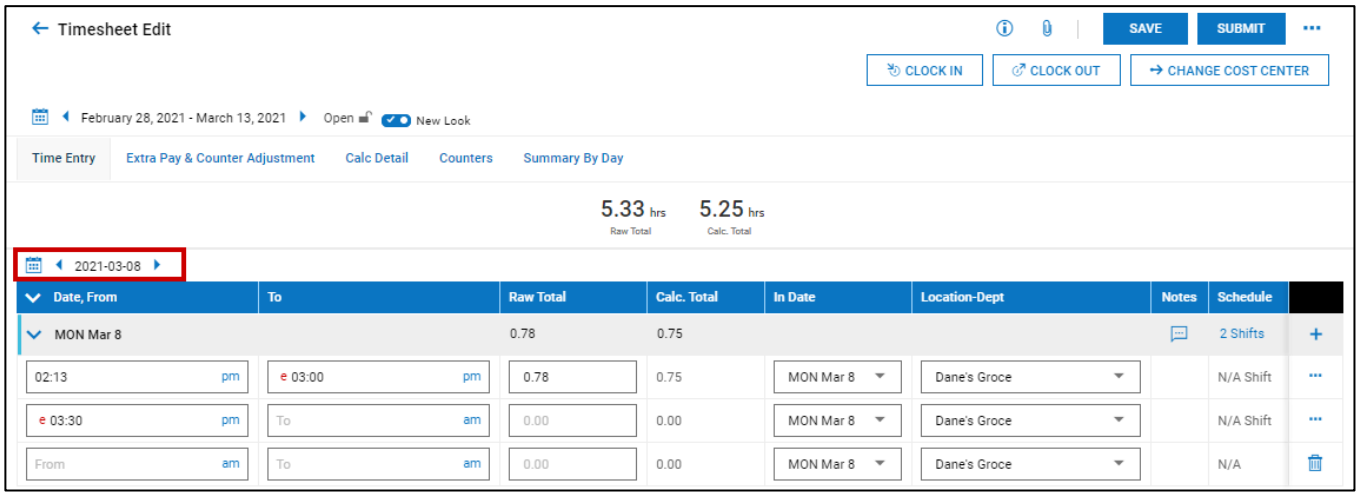
Start/End

The Start/End All Days timesheet allows you to view all days within one pay period on one screen, as shown below. This profile can be configured to allow you to stamp time with the clock buttons, or manually enter time.

Full Pay Period/Weekly View:



Daily View



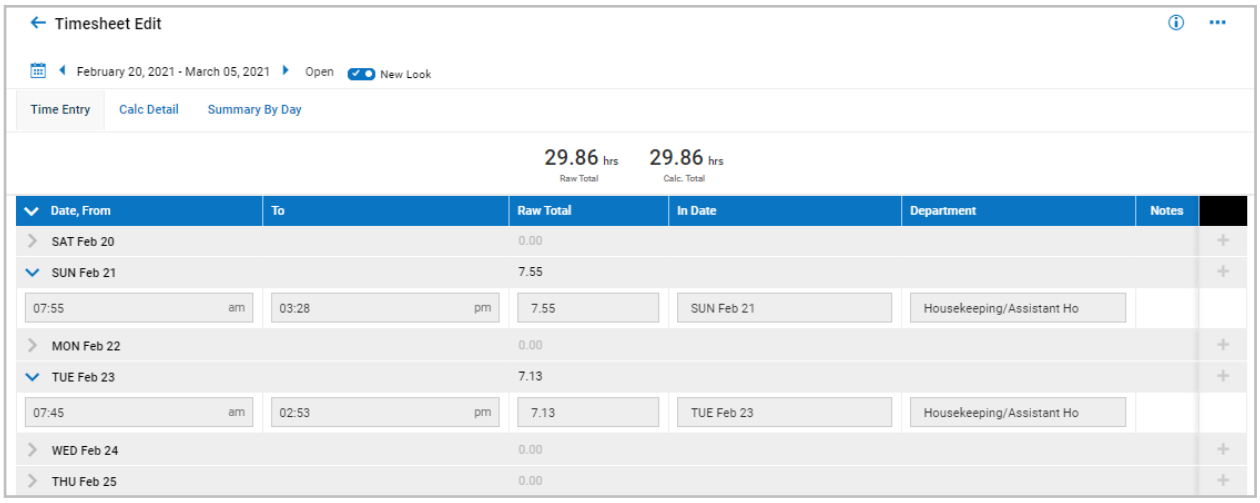
To record time entries in a Start/End (All Days) timesheet, do the following:

1. The timesheet will open to the current pay period and display all days in that time period.
2. If necessary, click the Cost Center *Lookup* icon to browse and select a new or different cost center.

3. Depending on the settings assigned to this timesheet profile, you may enter your start/end times in the **From** and **To** fields or click the *Clock In* or *Clock Out* buttons to record your time.
4. Notes may be added for a day by clicking the *Notes* icon for the day being edited.
5. If enabled, the tabs across the top of the timesheet can be used to view your time in detail or summary views, as well as view your schedule.
6. Use the buttons at the top to *Save*, *Undo*, and *Submit For Approval*. If enabled, the *Utilities* button will provide links that will list information about your account, time offs, schedule, and allow printing. If enabled, the *Info* button will provide links and information about the profiles to which you are assigned.
7. Continue entering time records as appropriate. If necessary, use the *Plus* sign to add rows if multiple entries for a day is required.
8. Click the *Save* button.

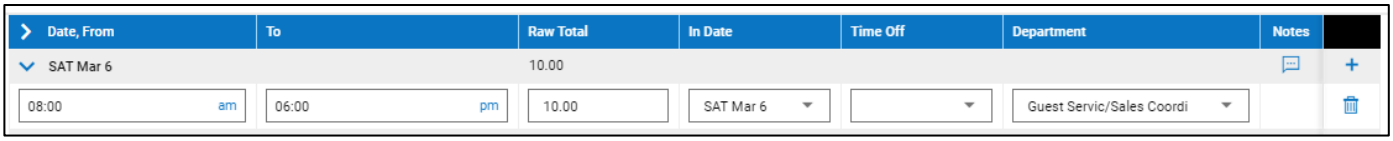
Small Business

With this timesheet type, you will enter your time via clock buttons. Editing your time entries may or may not be available.



To record time entries in a Small Business timesheet, do the following:

1. The timesheet will open to the current pay period and display the entire pay period under the *Timesheet* tab.
2. Click the *Clock In* button to register an In Punch.
3. Click the *Clock Out* button to register an Out Punch.
4. If enabled, you may be able to edit your time by entering it in the white fields. When editing, cost center information is able to be edited by clicking the *Lookup* icon in the Cost Center fields. The entry may be able to be deleted if that functionality has been made available.

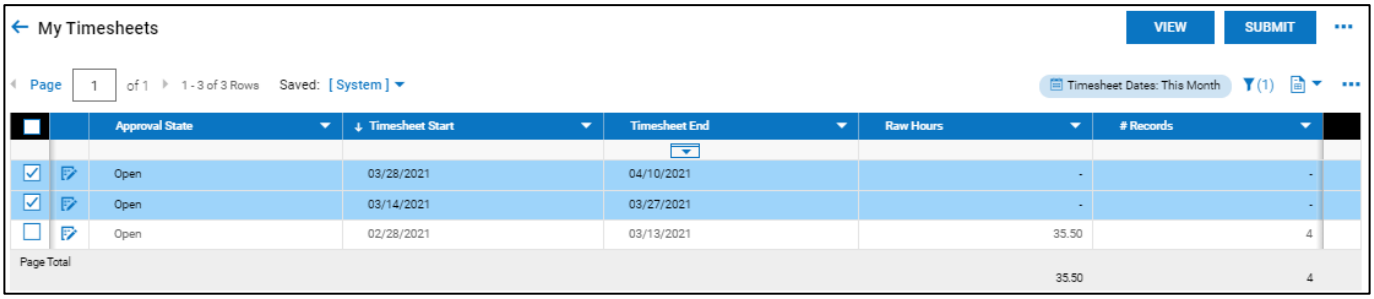


5. If enabled, the tabs across the top of the timesheet may be used to view your time entries in detail or summary view. You may also be able to view your schedule.
6. Use the buttons at the top to *Save*, *Undo*, and *Submit For Approval*. If enabled, the *Utilities* button will provide links that will list information about your account, time offs, schedule, and allow printing. If enabled, the *Info* button will provide links and information about the profiles to which you are assigned.
7. Click the *Save* button.

Historical Timesheets

My Info > My Time > Timesheet > Historical Timesheets

Under the Timesheet menu is the Historical Timesheets menu which displays a list, in read-only format, of an employee's timesheets and their statuses (Open, Approved, etc.)



Change Requests

My Info > My Time > Timesheet > Change Requests

Users can request timesheet changes through their timesheet. The button can be accessed from the *Actions* icon in the timesheet. See Timesheet Change Requests in this document for more info. The history of those requests will show here including, date, type, status etc.

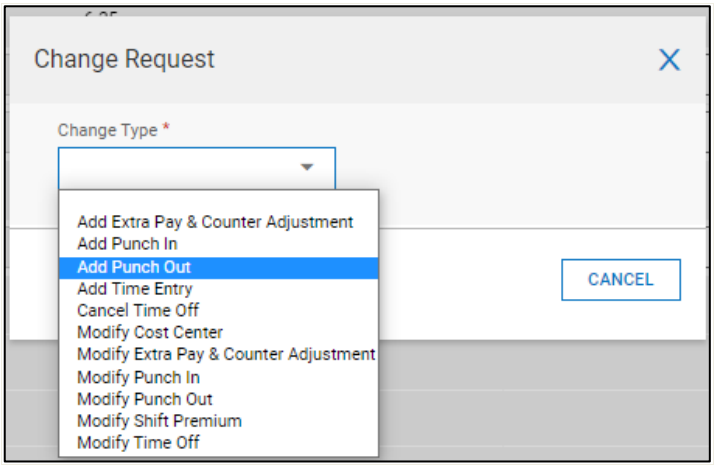
Timesheet Change Requests

My Info > My Time > Timesheet > Timesheet

If you are unable to edit your own Time Off Requests or time, you may be able to request a modification from within your timesheet via the Change Request option. The option to submit a Change Request may or may not be allowed by your company. If it is not allowed within the Time and Labor Module, your company will notify you of the process to request a modification.

To request a timesheet change, do the following:

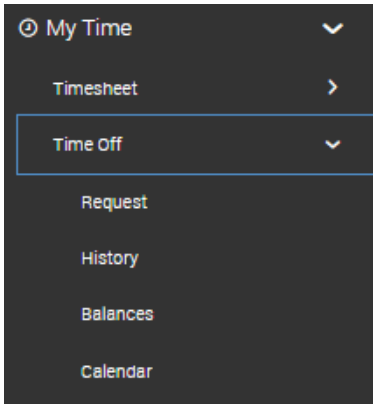
1. To make a request to modify your timesheet, go to the appropriate timesheet using Historical or Timesheet.
2. Click the **Change Requests** button and select the type of change needed.



3. Based on your selection, you can enter the appropriate information and then click on submit changes.

Time Off Menu

The *Time Off* menu contains options to create a request, view time off history, view time off balances and view open absences created by managers or administrators.



Request

My Info > My Time > Time Off > Request

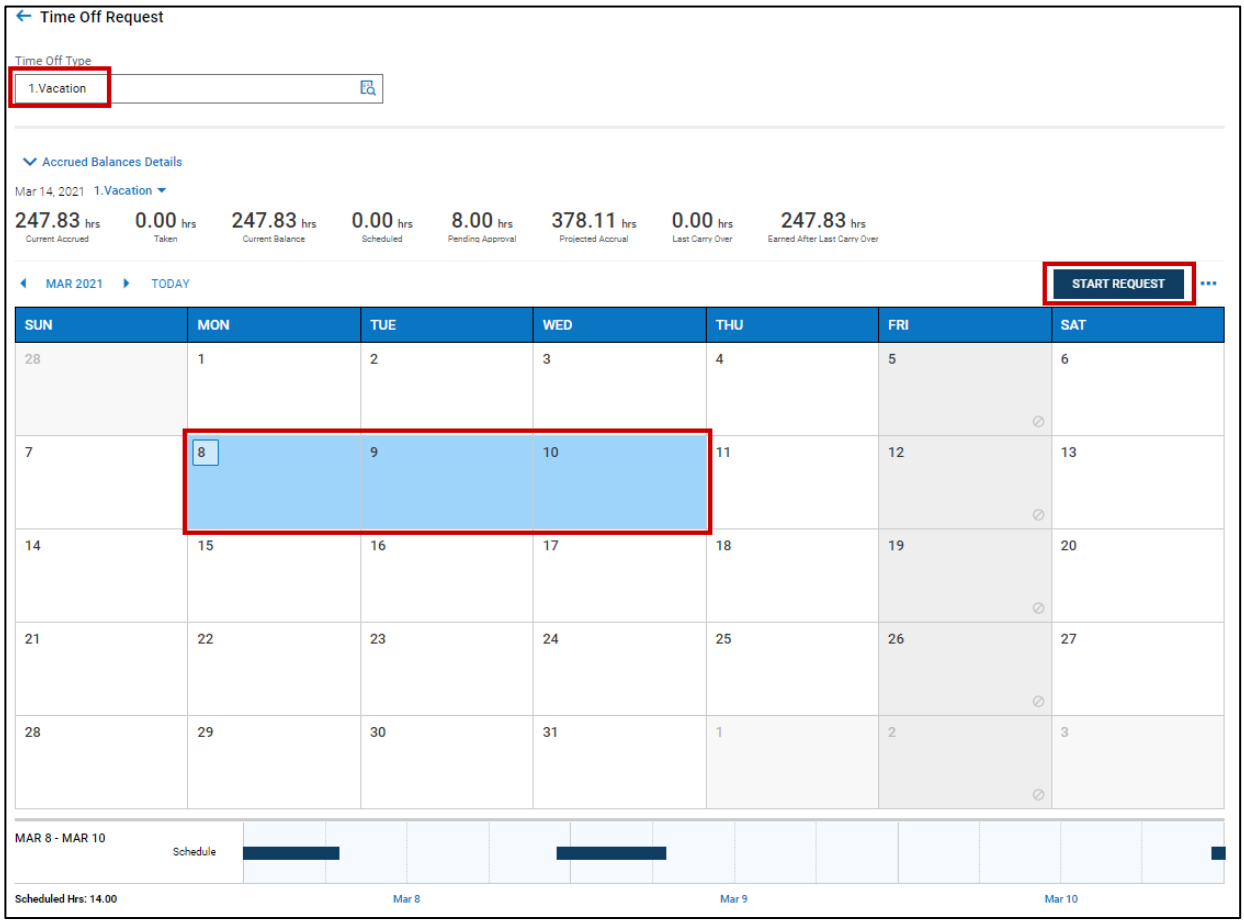
To create a request, select from one of the menu paths listed above. Enter the *Time off type*, *Request type*, and if required, a *Comment*. The *Request* type will determine the additional fields that display. For example, if selecting *Multiple Days*, the *From/To* date fields and *Hours per Day* field will display. Each type will display the required fields for the type chosen.

Click *Submit Request* when done. After the submission, a success message will display. After clicking *OK*, the *Request* page will display where another request can be made. If no

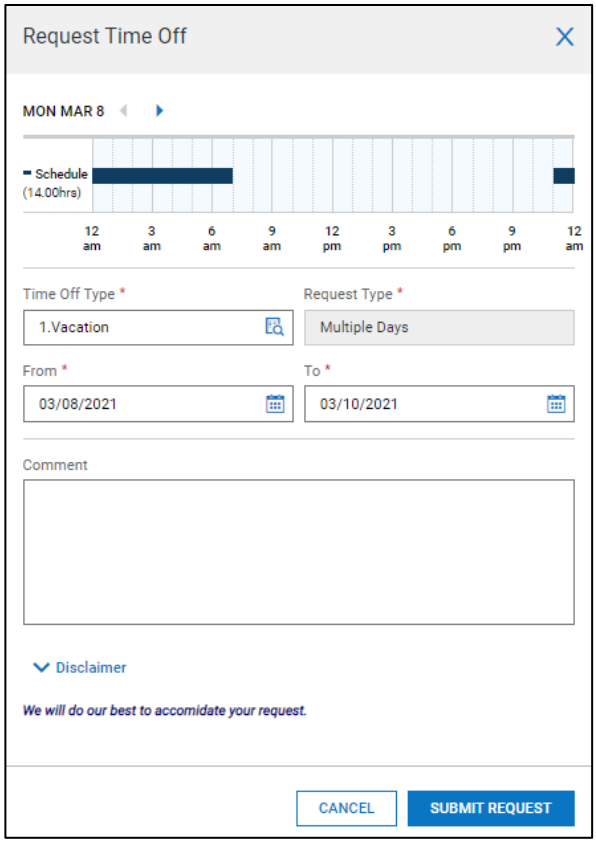
further requests are needed, you can return to the main menu by clicking the hamburger icon, or if you would like to view the history of your requests, click the *Request* chevron icon, and select *History* or select *Balances* to view your accrual balances (these options are shown next).

To request time off, do the following:

1. In the **Time Off Type** field, select the type of time off you would like to take using the *Lookup* icon.
2. Click on the desired dates on the calendar.
    a. To select more than 2 days, hold shift key will selecting begin and end dates.
3. Click Start Request



4. Pull in the Request Type, Full, Partial or Multiple Days.
5. Enter Times (if using specific times), be sure to specify AM or PM accordingly
6. Enter any notes you may want to communicate to your approver regarding your request in the **Comments** field. Click the **Submit Request** button.



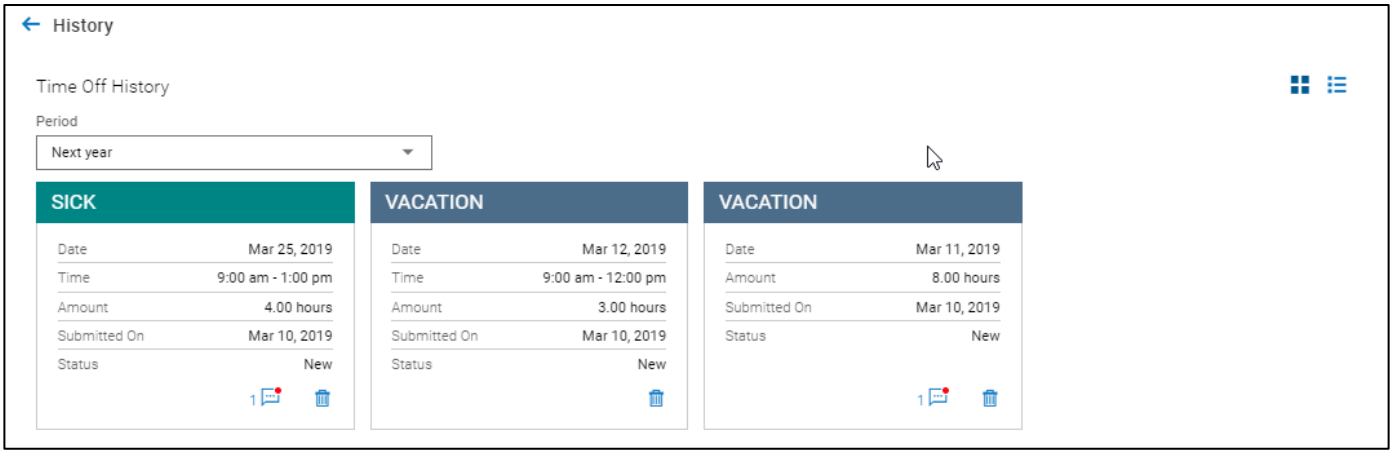
History

My Info > My Time > Time Off > History

From the *Time Off History* page, you can view request history for the *Past Year*, *Next Year*, *Next 3 months*, or *Past 3 months*.

From this page, you can view comments, delete, or cancel the request by tapping the trash can icon. When attempting to delete a request, you will receive a confirmation to cancel or continue.

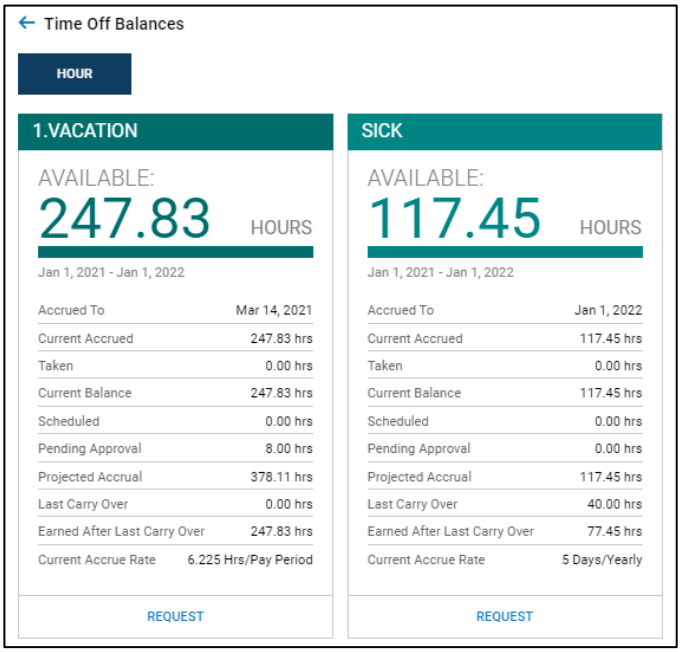
Once done viewing history, you can return to the main menu by clicking the hamburger icon, or if you would like to view your accrual balances, click the *History* chevron icon, and select *Balances*.



Balances

My Info > My Time > Time Off > Balances

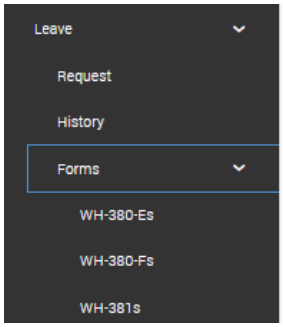
From the *Balances* page, you have the option of viewing your balances in days or hours. Having this option will depend how your company has configured your accruals. Each set of balances contains a *Request* link and when tapped, will open a new time off request. Once done viewing balances, you can return to the main menu by clicking the hamburger icon and re-selecting an option.



Leave Menu

Absence requests will only display if your company is using the Leave module and has it activated to display on your application. This can be accessed from ***My Info > My Time > Leave,*** or from within the tabs at the top of the *My Time* menu. When accessing this option, the request page will open where new requests can be made.

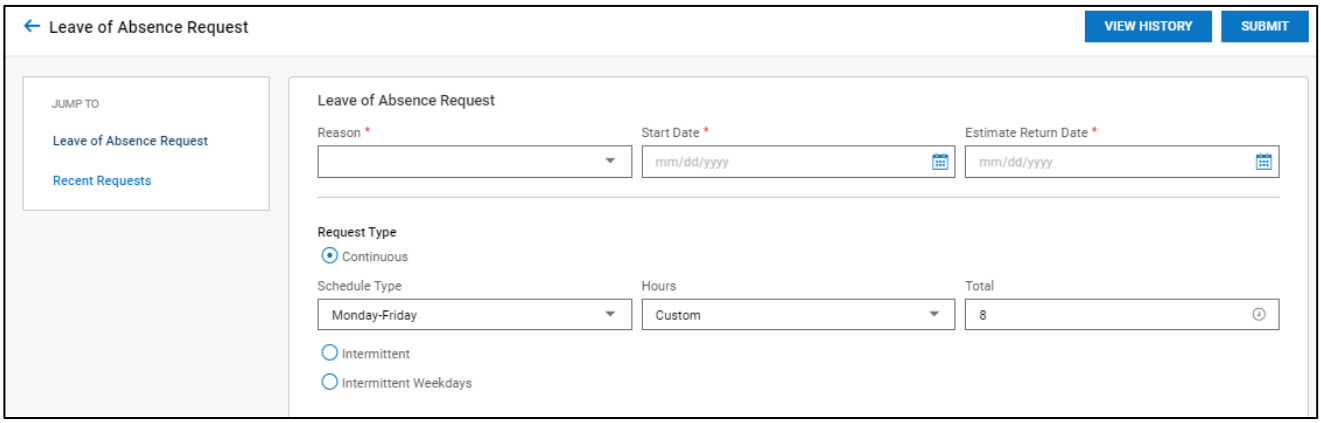
Under the *Forms* menu, commonly used WH-38X forms are available and employees can view their forms from this menu.



Request

My Info > My Time > Leave > Request

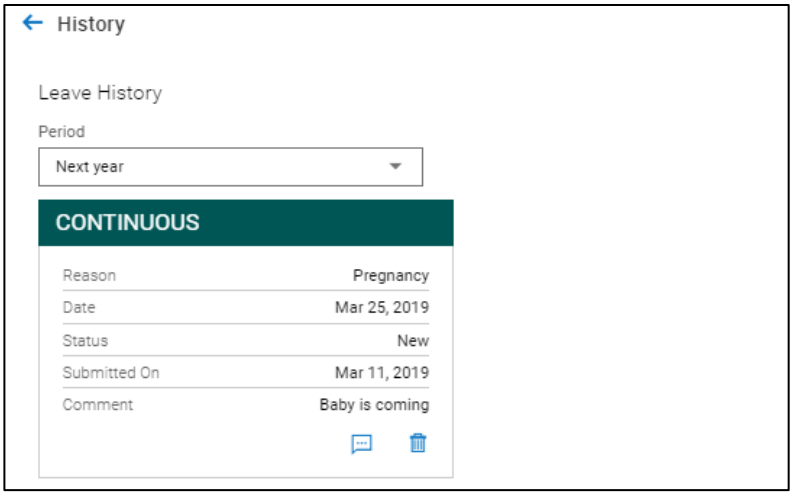
Fill in all the required fields and submit the request. Once submitted, you can click the *Request* chevron icon to view absence request *History*.



History

My Info > My Time > Leave > History

From the *History* page, you can view requests for *Next year*, *Past year*, *Next 3 months*, or *Past 3 months*. With each request, you can view comments, or delete the request, if authorized. When finished, you can select another menu item, or navigate back to the Main menu by clicking the hamburger icon.



My Schedule

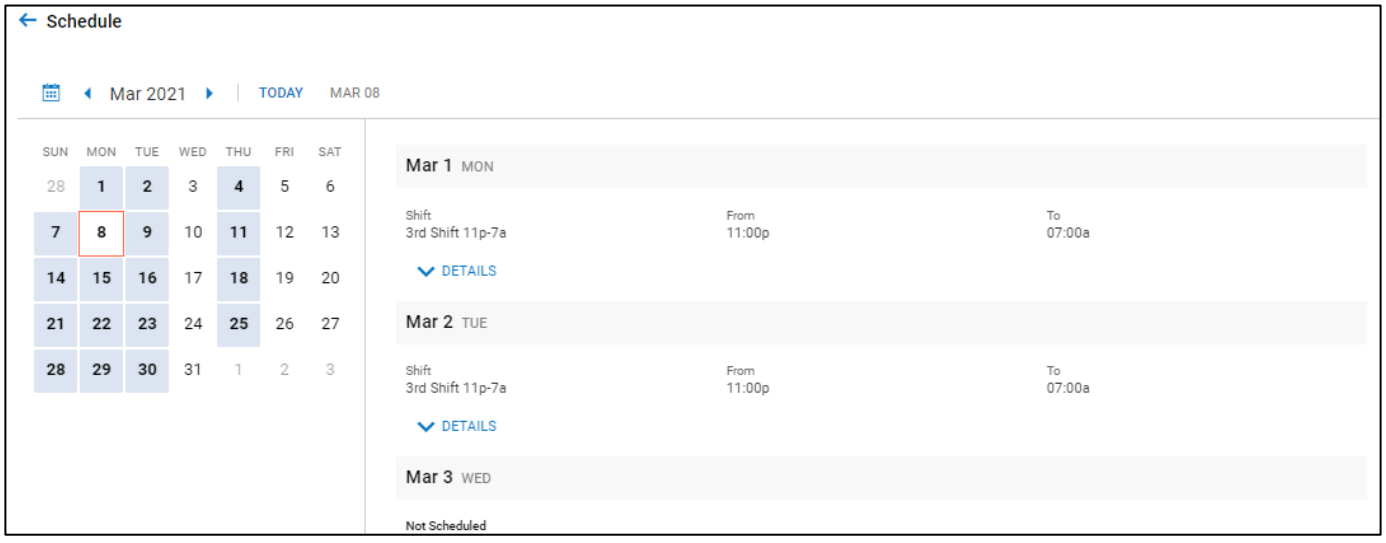
*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks > View My Schedule***

The My Schedule menu contains options for basic scheduling and advanced scheduler.

Schedule

My Info > My Time > My Schedule > Schedule

Schedule information can be accessed from the following areas: ***My Info > My Schedule > Schedule,*** or from the *Schedule* tab within a *Timesheet*. The month/year can be adjusted forward/backward with the date arrows. The current day will be highlighted. Details of each scheduled day can be viewed below the calendar.



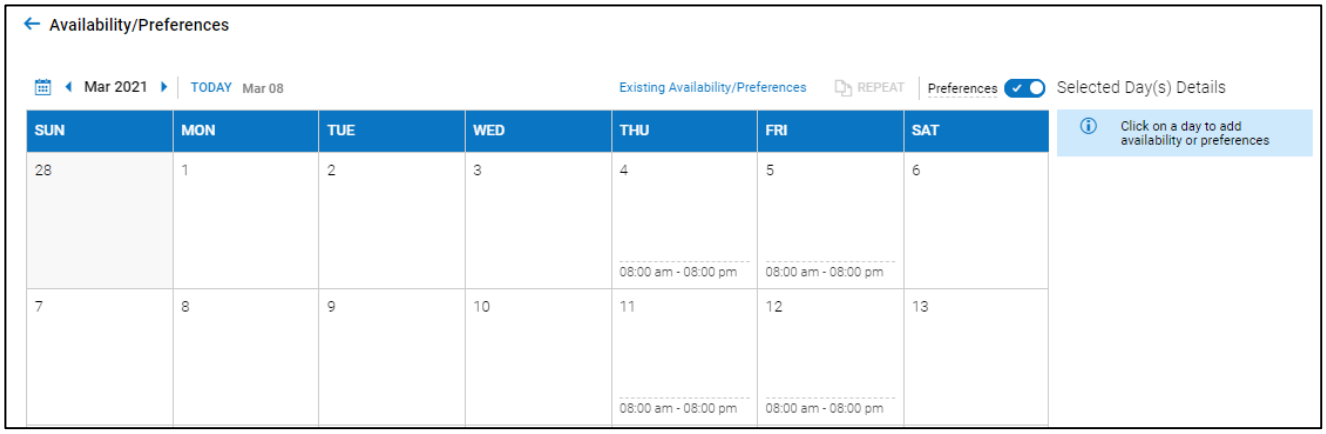
Visual indicators/icons display on the calendar available to employees so that the employees know when there is:

- Time Off
- Holidays
- Scheduled shift(s)
- Posted shift(s)
- Open shift(s)

Availability/Preferences

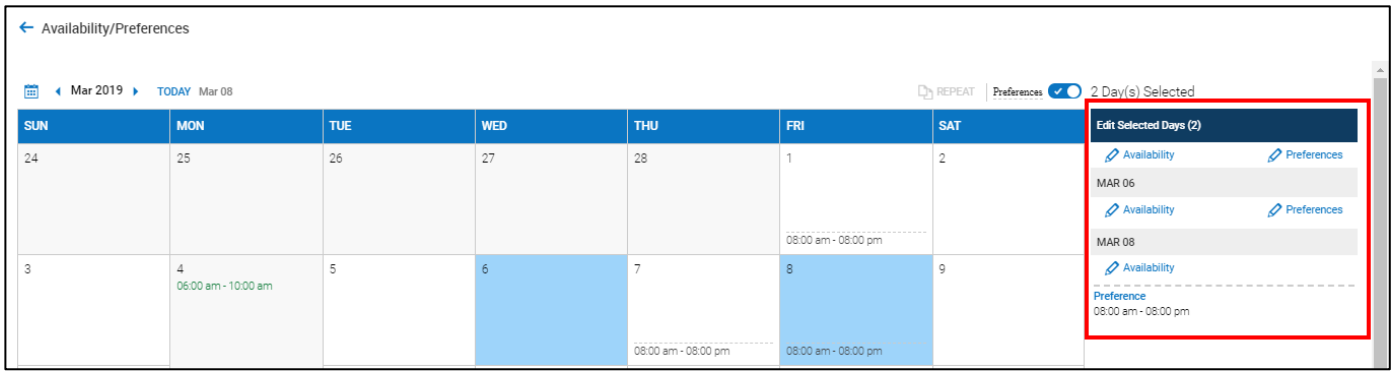
My Info > My Time > My Schedule > Availability/Preferences

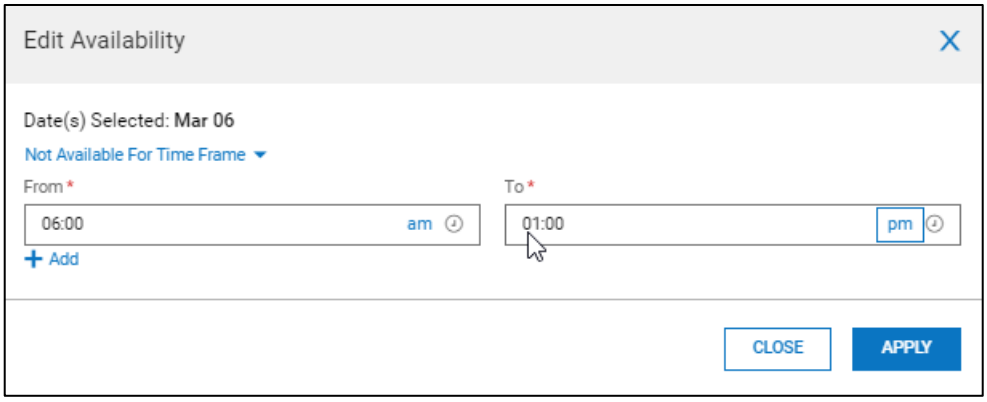
If the Scheduler module sub-system is enabled in your company, and individual employees are authorized to set their own availability and preferences, the *Availability/Preferences* menu will display under the *My Schedule* menu.



To set your own availability, tap the days to be edited. The days will highlight and be added to a list at the bottom of the page.

Enter the times and click *Apply*. The times will display on the selected days. Tapping those days after adding the times will display the entered times below the calendar. The same procedure can be used for preferences.





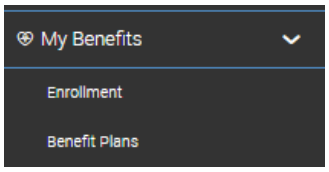
My Benefits

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks > Reviewing and Selecting Benefits***

My Benefits will display your current benefit plans. If your company's Open Enrollment for benefits is active, you can enroll in benefits from within this menu, or see the status of previous or ongoing enrollments.

Tap *Main menu* to return to the other options. Tapping the *Home* icon will return you to your home page, where you will need to access the hamburger icon again to get to the main menu options.

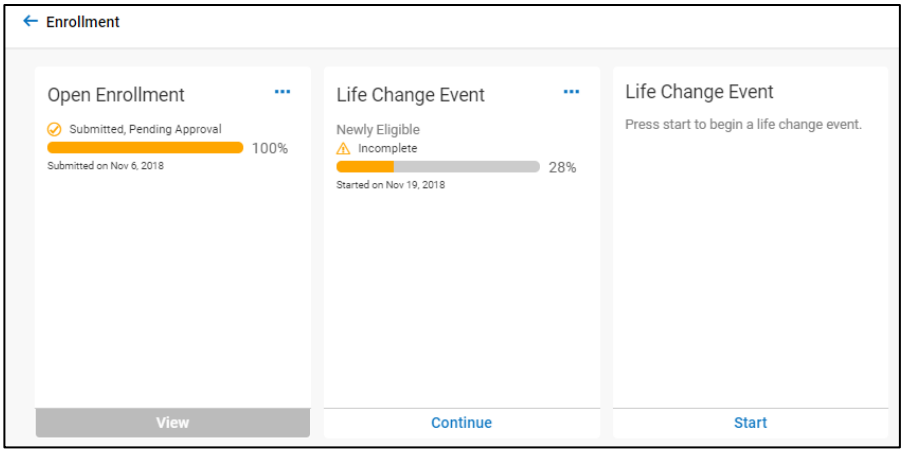
If your company has the *My Benefits* widgets on your Home page, you can perform many of the same functions there, such as viewing your benefit profiles and processing enrollments.



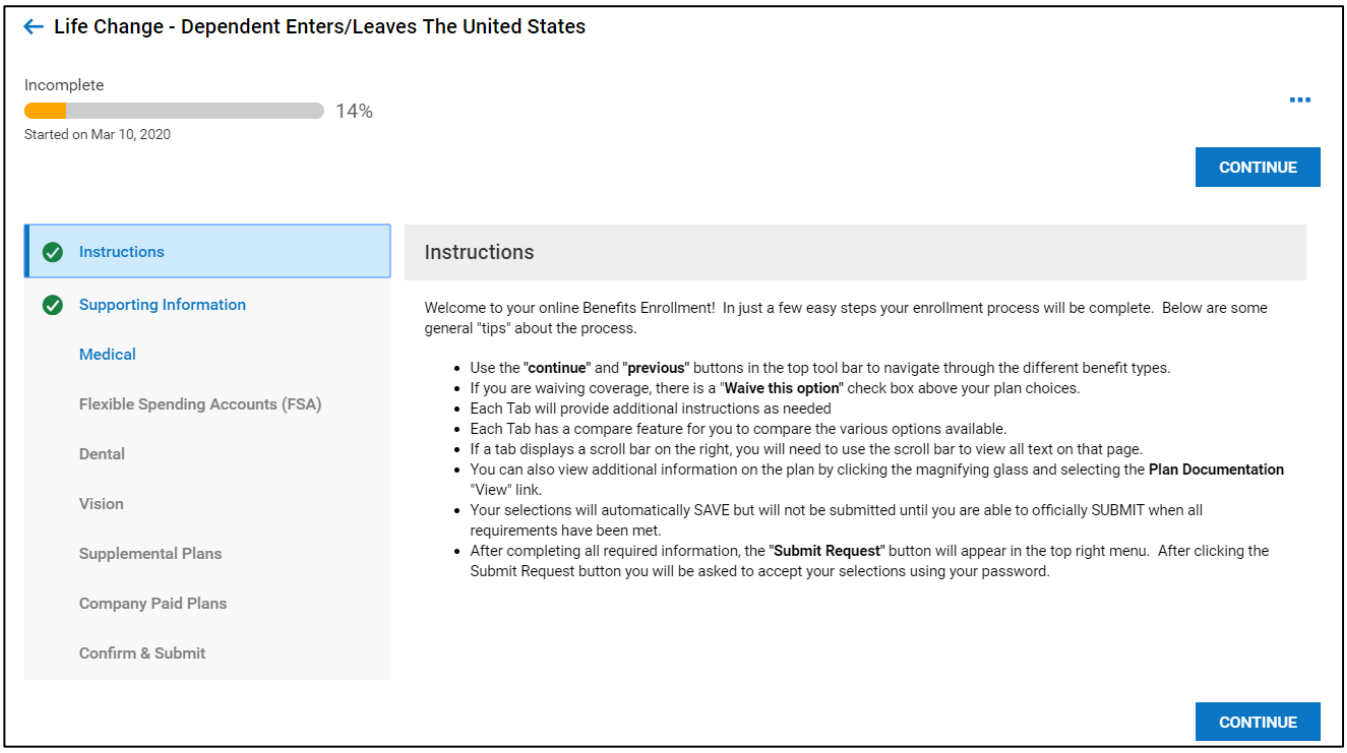
Enrollment

My Info > My Benefits > Enrollment

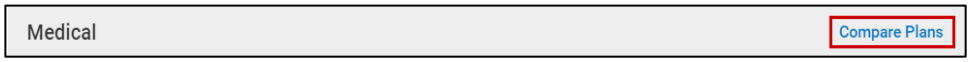
This tab will display Open Enrollment options, including new and pending enrollments, and the status of submitted enrollments. Select View, Continue or Star for you Desired Item.



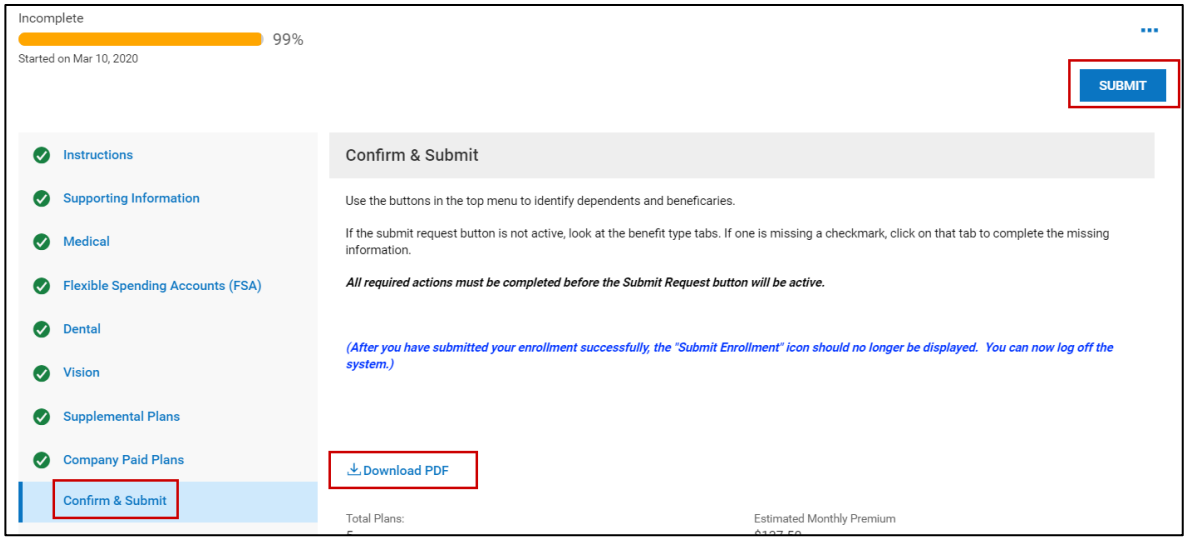
1. Select View, Continue or Star for you Desired Item.
2. Click Continue to move through tabs after selecting plan and coverage.



3. Select the coverage within the desired plan, the check the plan.
    a. You can select multiple plans then click Compare plans at the top of the page.



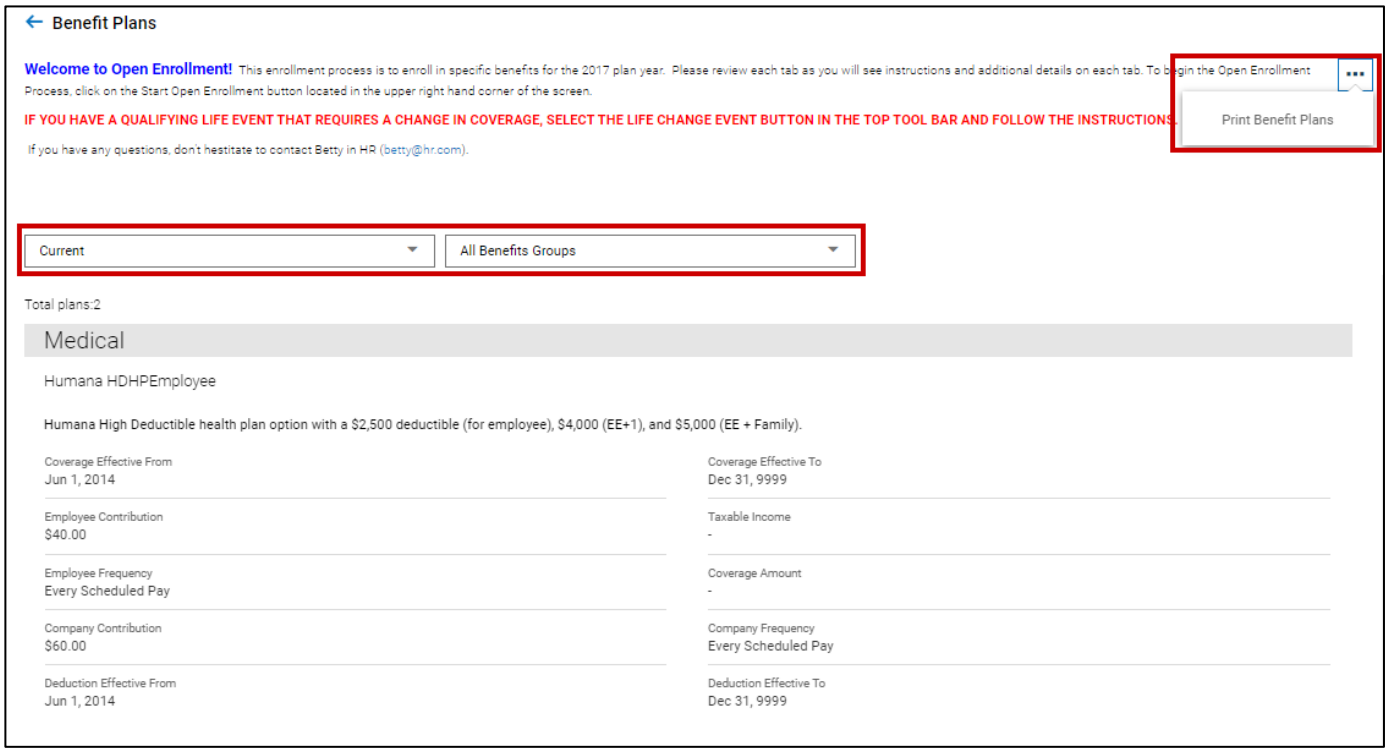
    b. Typically, if you not electing a plan, you must select Waive…
4. Click Continue until all have been complete.
5. Once all are complete Review your selections. Download a pdf (if desired) and click Submit.

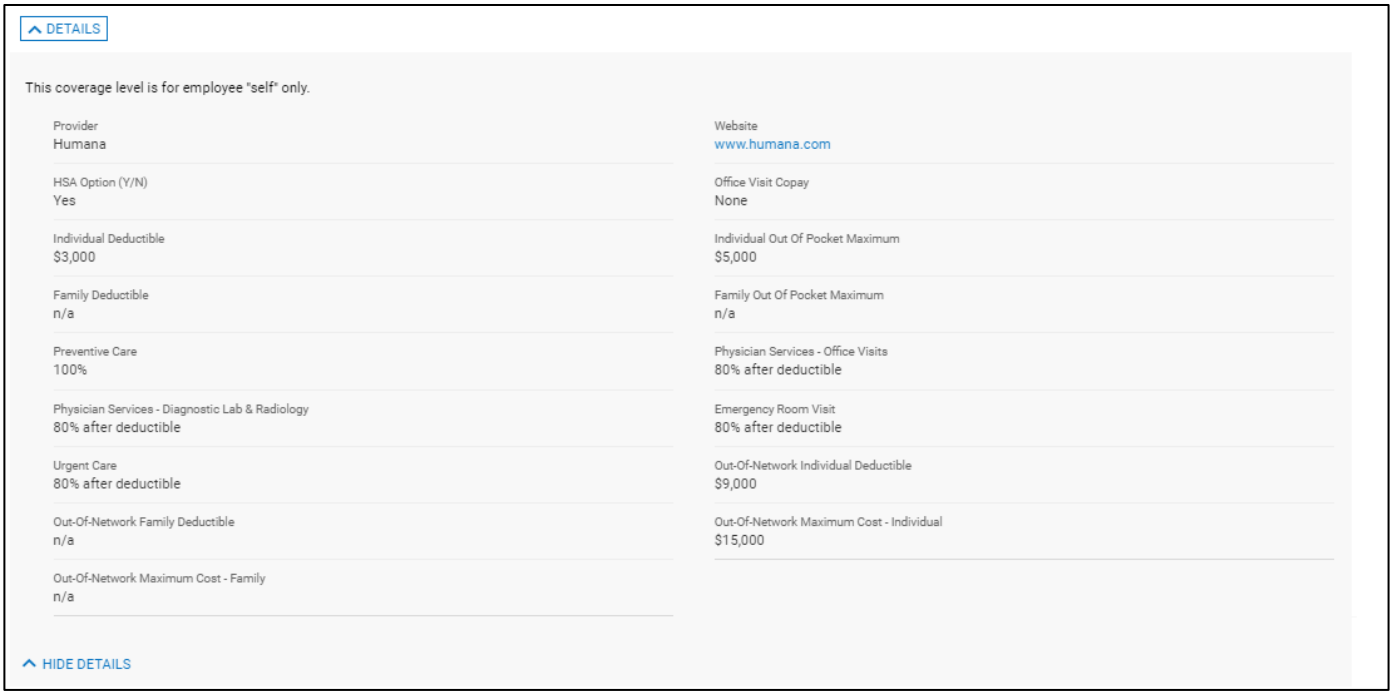


Benefit Plans

My Info > My Benefits > Benefit Plans

Any benefit plans you are currently enrolled in will display here.

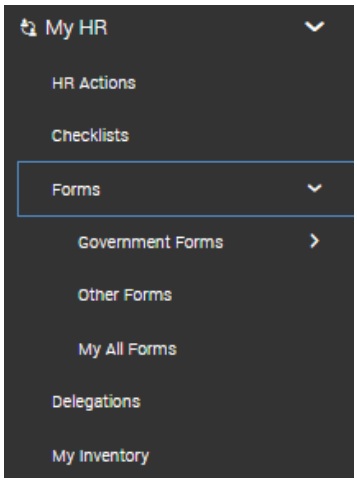




My HR

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > Managing My Actions***

Under the My HR menu, users can view and respond to HR actions, checklists, forms, delegations, and inventory.



HR Actions

My Info > My HR > HR Actions

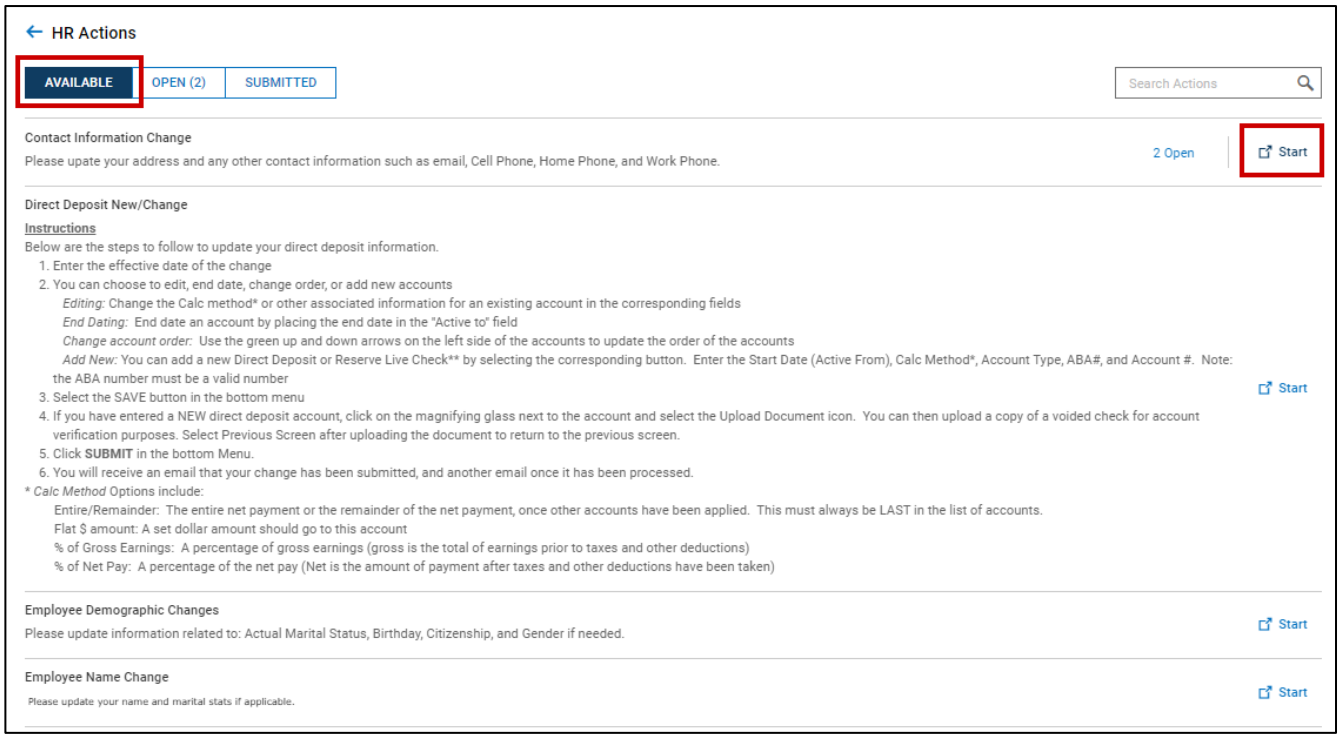
HR Actions are accessed under ***My Info > My HR > HR Actions*** (for employees) and under ***Team > HR > HR Actions*** (for managers). Under *Team*, managers view a list of HR Actions assigned to their employees. If authorized, they can edit or start another HR Action of the same type and assign to another employee.

Overview

Users will find HR Actions under the *Available* tab that have been pre-configured by a system administrator. All tabs contain a Search window where users can enter criteria to find only those HR Actions containing the characters listed. The system will search titles and descriptions.

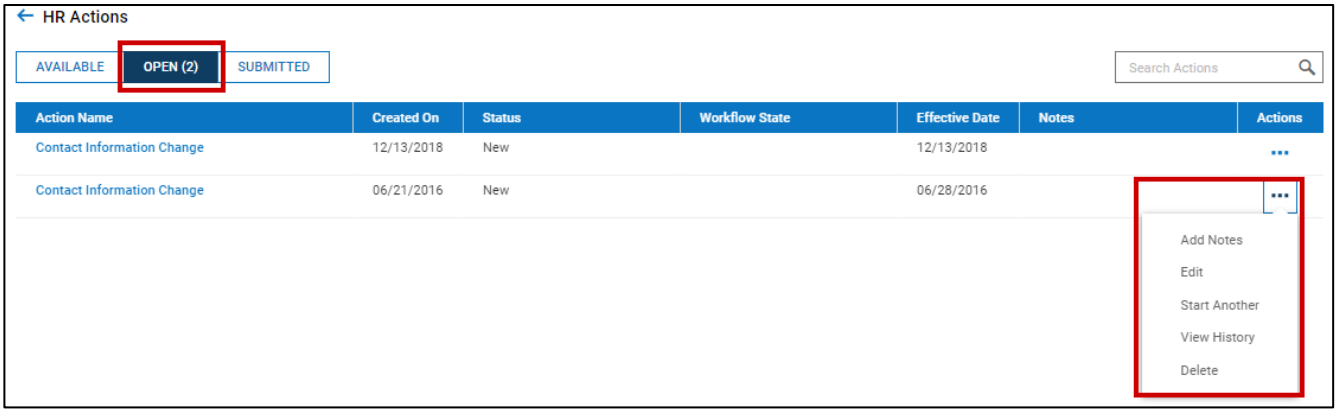
Available Tab

The *Available* tab allows users to initiate an HR Action request. After tapping or clicking **Start** to initiate Hire actions, users must distinguish between new applicants and existing employees. For other types of actions, the employees can be retrieved from a search page.



Open Tab

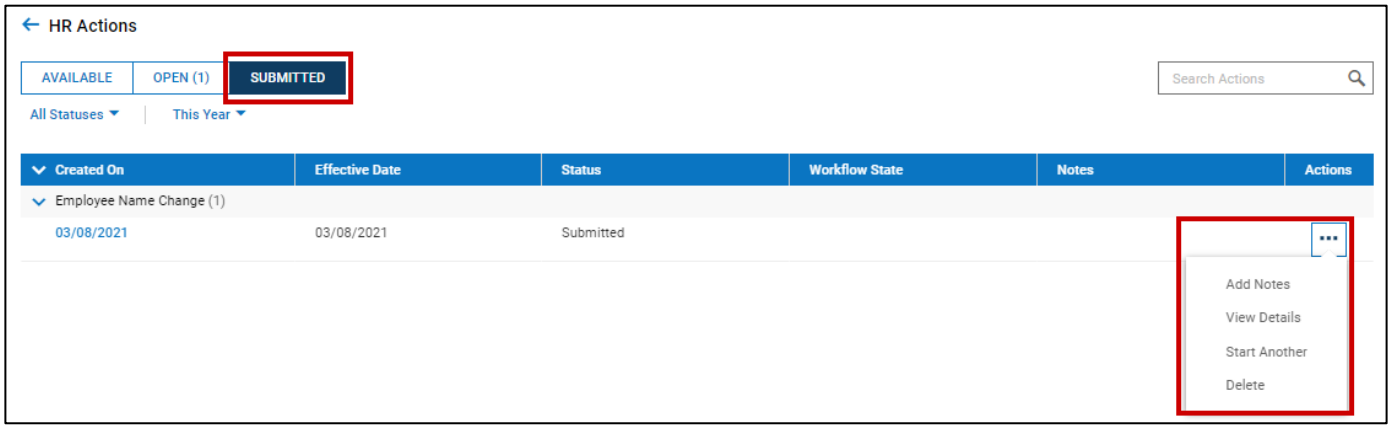
The *Open* tab will list all open HR Action requests that have not had an action taken on them.



- A dynamic counter will display the total number of open requests on the tab. This number will be updated as requests are added, submitted, or deleted.
- When tapping the *Actions* icon, options will display such as *Add Notes*, *Edit*, *Start Another*, *View History*, and *Delete*. User security permissions will determine the options displayed.
- The *View History* option will redirect users to the *Submitted* tab where previously submitted requests can be viewed.

Submitted Tab

The *Submitted* tab will list all submitted HR Action requests that are completed or may require action. When tapping the *Actions* icon for an action, options will display such as *Add Notes*, *View Details*, *Start Another*, and *Delete*. User security permissions will determine the options displayed. Users will be able to search for specific HR Actions using the *Search* window. The system will search all tabs.

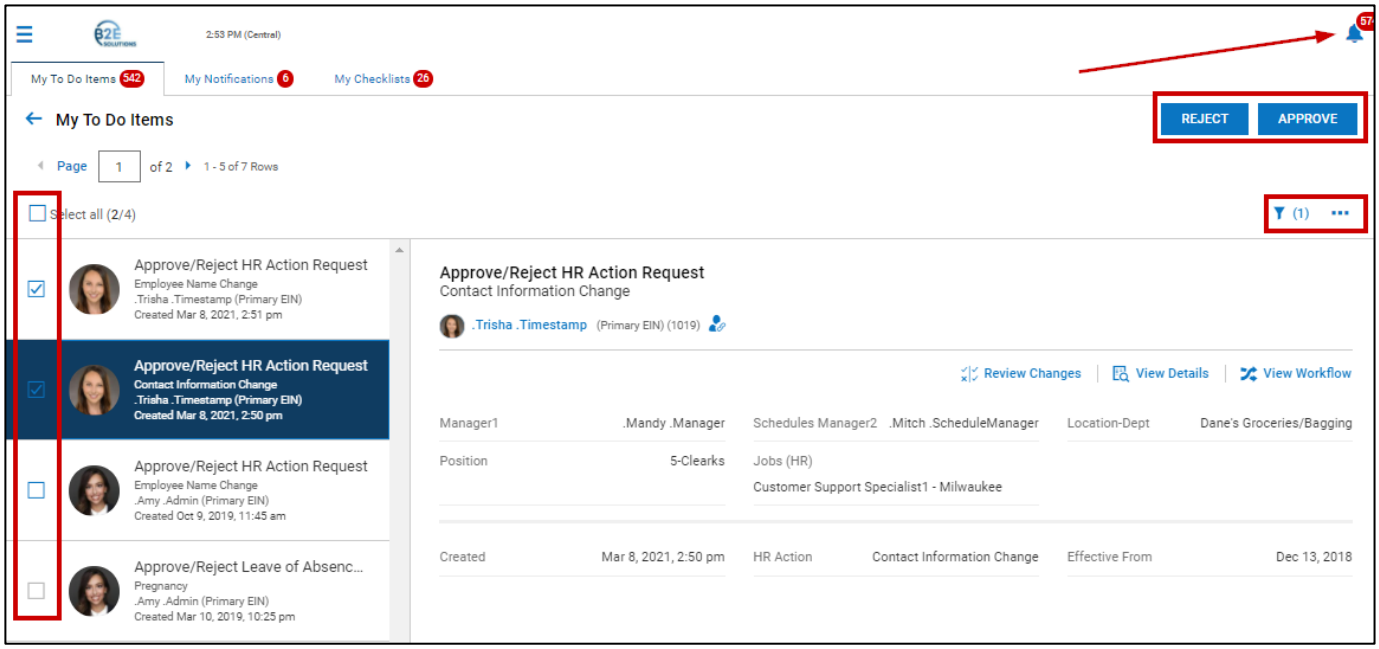


- Users will be able to add notes to their HR Action requests within the *Notes* field, after selecting the *Add Notes* option under the *Actions* icon.
- For managers, the ability to maintain default cost center fields for their employees are available if cost center items are included in the HR Action. The ability to edit cost centers can be controlled by the user's security profile, or by checking the security override for the cost center item in the HR Action.

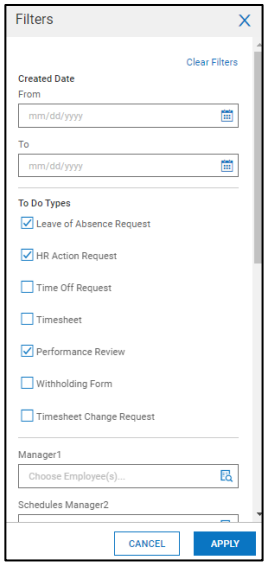
- In the desktop, managers can view their employees' open HR Actions under the *Pending HR Action Requests* widget under *Employee Information*. Requests will be visible when the HR Action's effective date is set in the future. The pending HR Action can be viewed by clicking the icon in the widget.
- HR Actions will display the details of the request in the *Open* and *Submitted* tabs. Details will include the date the action was created, Status, Workflow State (i.e., New), Approver, and the Effective Date.
- After an HR Action is submitted, a To Do Item will be generated for the designated user. Viewing details, reviewing, and editing of the To Do Item is supported prior to approving. After edits are made, a message will display indicating manual changes were made. Edits will display as the *New* value and will be bolded.

To Do Items

The examples shown below are from a user's My Do Items, accessed under their My To Do icon.

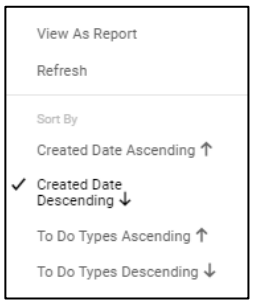


- From this screen you can select multiple items to approve or reject using the check boxes at the side.
- **Filtering** - Click on the funnel icon in the upper right (just below reject/approve) (0)
    - From this drop down you can filter by multiple options. Some include, Date Created, To Do Type, Manager, Location, Department, Employee and EIN.



- Once you have chosen the desired filters click Apply at the bottom.

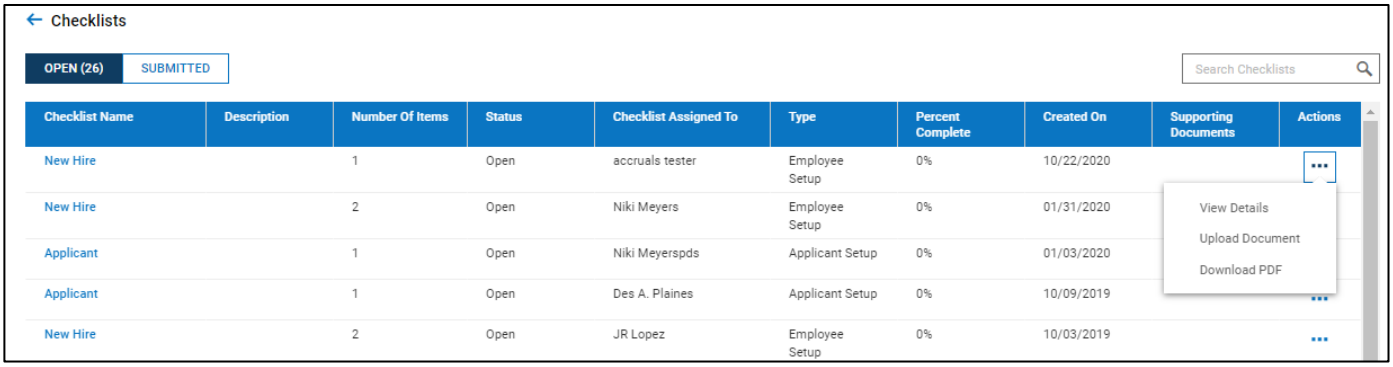
- **Alternate Views** - Click on the Action icon in the upper right (just below reject/approve) 
  - From this drop down you can filter by multiple options. Some include, View As Report, Sorting by Created Date or To Do Type.



Checklists

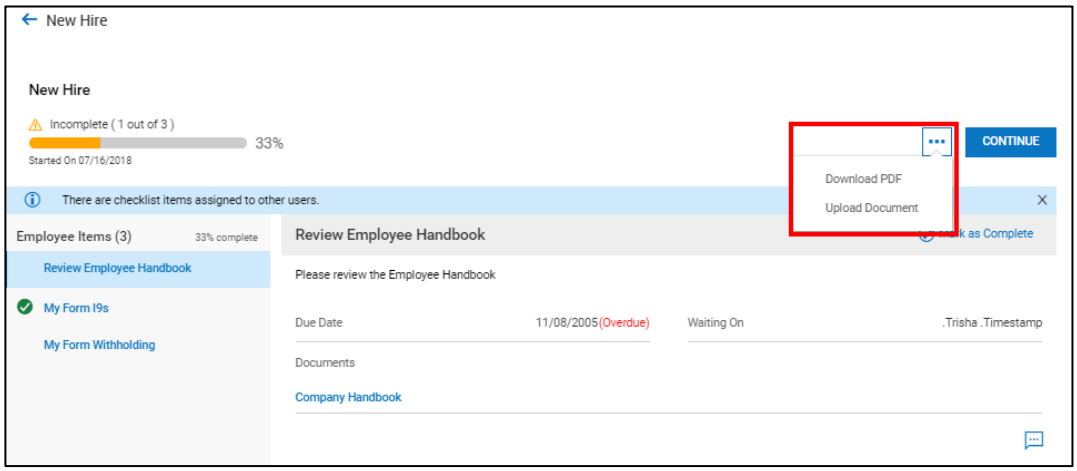
My Info > My HR > Checklists

Employees with appropriate permissions can view and complete employee checklist items. Support for completion of checklist items is currently limited to employees and employee checklists.



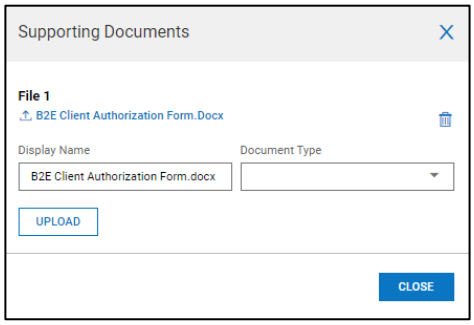
View Details

Users can tap the *Actions* icon and select *View Details* to proceed through the steps to complete the checklist. From the pages, another *Actions* icon is available, allowing users to download a PDF of the checklist, or to upload a needed document to complete the requirements of the step.



Upload Document

The option to upload a document is available under the *Actions* icon. A document type and display name can be selected/entered, and a link is available to upload a file.



Download PDF

Under the *Actions* icon, users can download the checklist in PDF. The PDF will display all the steps in the checklist, and show which steps are completed (green check) or incomplete (blank checkbox).

New Hire
Checklist (New Hire)

Applicant: .Trisha .Timestamp

		Completed On	Completed By
Employee Items			
☐	Review Employee Handbook Please review the Employee Handbook	-	-
☐	Provide Access Entry Keycard Provide new employee with Key Card access for building	-	-
☑	My Form I9s Complete I-9 form	10/23/2018 03:25p	Nicole
☐	My Form Withholding Complete W4 for Federal and State	-	-
☑	New Computer Provide new employee with laptop and login instructions for email, company internet, and Sharepoint	06/03/2018 09:24a	Nicole

Forms

My Info > My HR > Forms

Under the Forms menu, employees can access many different types of forms as uploaded by their company. Options include governmental forms, other forms, and an area for all forms. Employees can be given authority to edit forms under the *Other Forms* or *All My Forms* menu. In the available options under the *Actions* icon, users can edit or delete a form, create another form, download a PDF of the form, view the history of the custom form (what has been submitted) and view the detail report (where custom form items can be edited or deleted.)

The *View Detail Report* option will be available on both the *Open* and *Submitted* tabs.

Government Forms

Government Forms include forms such as 1095-C, 1099s, I9s, W2s, Withholding, and any other state or federal forms required by your employer. When adding a new form, be sure to Submit the form when you have it complete. This will initiate and email for your manager to review and update/approve as neccessary.

← Withholding

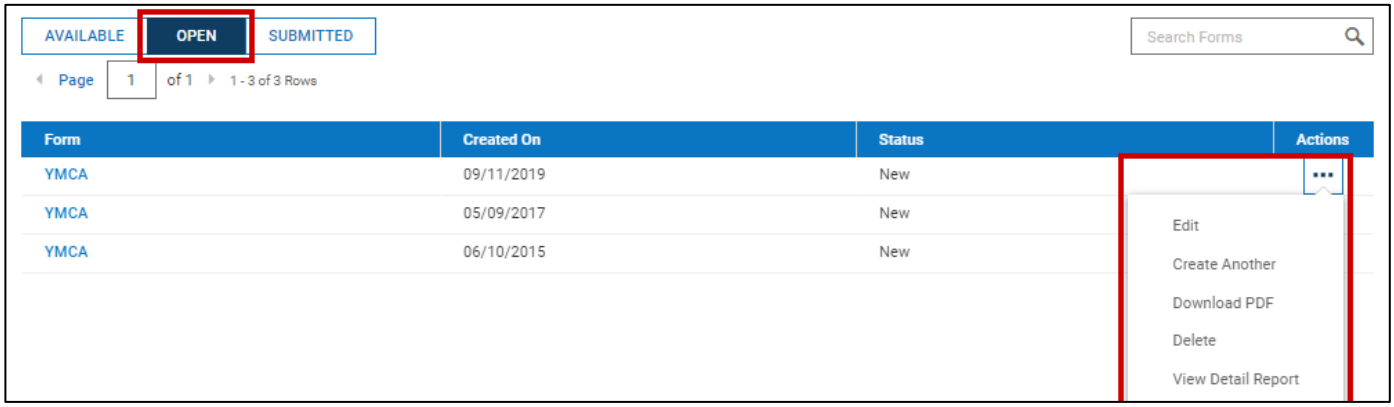
ADD NEW

Page 1 of 1 | 1 - 8 of 8 Rows | Saved: [System] | Columns (1) | (1)

		Year	Status	State/Federal	Code	Name	Created
✎	🗑	2018	New	Federal	W-4	Employee's Withholding Allowance Certificate	10/24/2018 01:27p
✎	🗑	2017	New	Federal	W-4	Employee's Withholding Allowance Certificate	07/18/2017 02:13p
✎	🗑	2017	New	Federal	W-4	Employee's Withholding Allowance Certificate	01/30/2017 01:48p

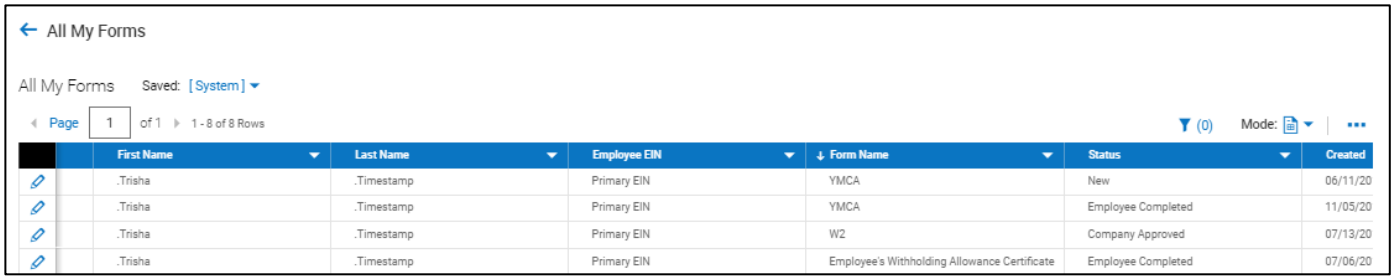
Other Forms

Forms under this area will consist of any custom forms created by your company. When adding a new form, be sure to Submit the form when you have it complete. This will initiate and email for your manager to review and update/approve as neccessary.



My All Forms

This area will house all your forms.



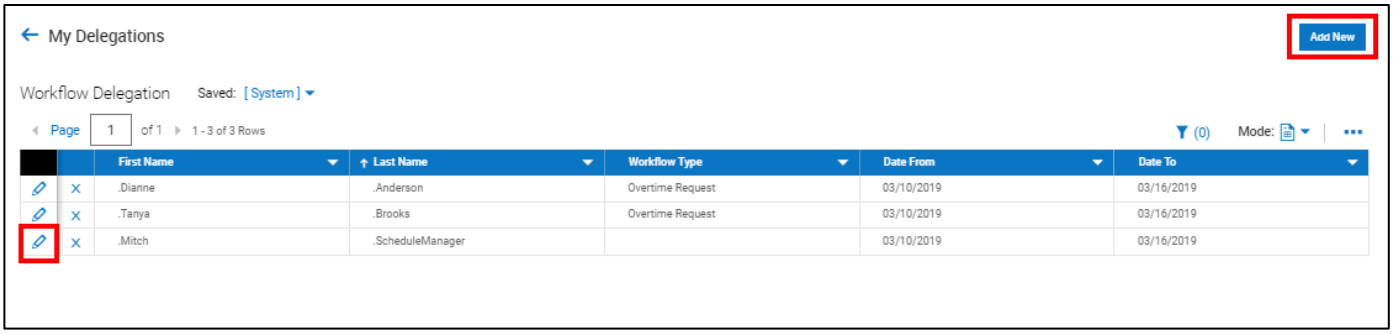
Easy Backgrounds

If your company uses the New Easy Backgrounds Marketplace product, employees can be set up so they can view any background checks ordered on them. This area will display those reports.

My Delegations

My Info > My HR > My Delegations

If a delegate has been set as your back up for handling the resulting My To Items from a workflow, those back up users, or delegates, will display here.



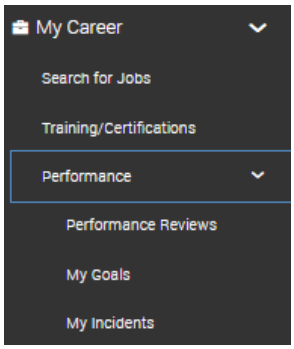
My Inventory

My Info > My HR > My Inventory

If an inventory items has been assigned to you, you can view and possibly add and delete those items here. Click the Arrow to view more detail.

My Career

Under the My Career menu, employees can access information about their performance reviews and learning options, as configured by your company. If your company posts job openings, those can be accessed under the *Jobs* menu.

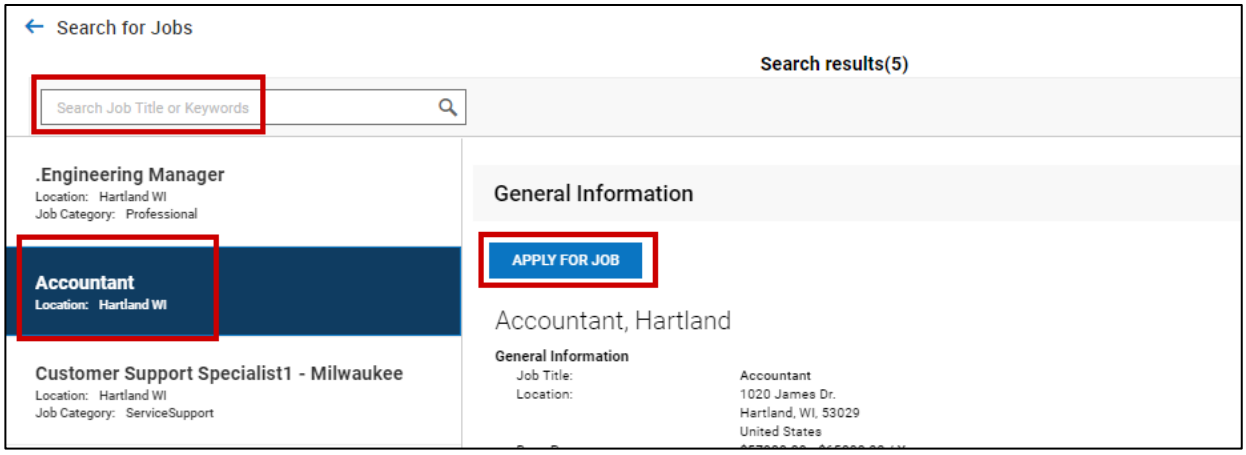


Jobs – Search for Jobs

My Info > My Career > Jobs

If your company has authorized or enabled this option, you can search for open jobs in your company and *Jobs* will appear under the My Career menu. From the Jobs menu, select the *Search For Jobs* option and any available jobs will display.

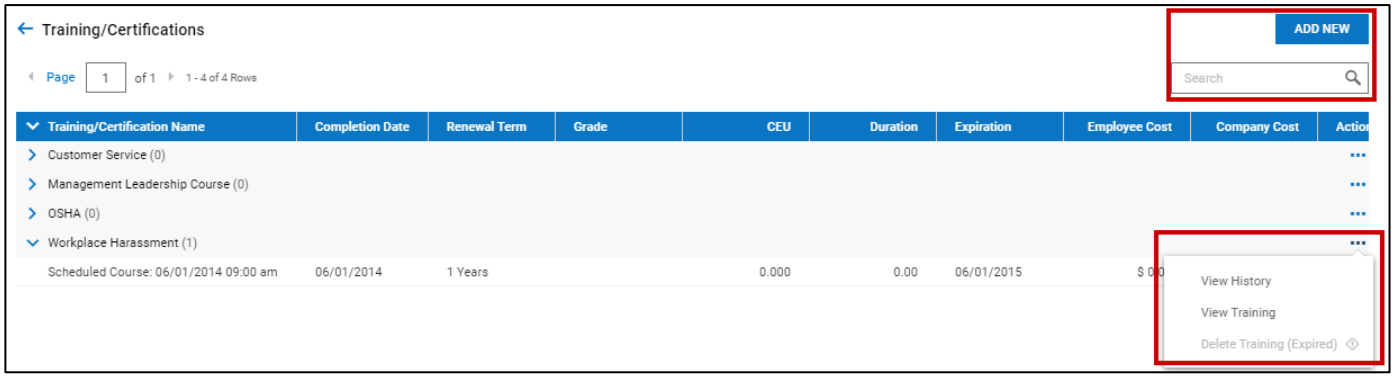
Click the job you wish to view General information on. Click Apply for this job if you wish to apply.



Training/Certifications

My Info > My Career > Training/Certifications

In this area you can review, edit, and add trainings and certification your company is tracking.



Performance

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Task > Viewing My Performance Reviews***

My Info > My Career > Performance

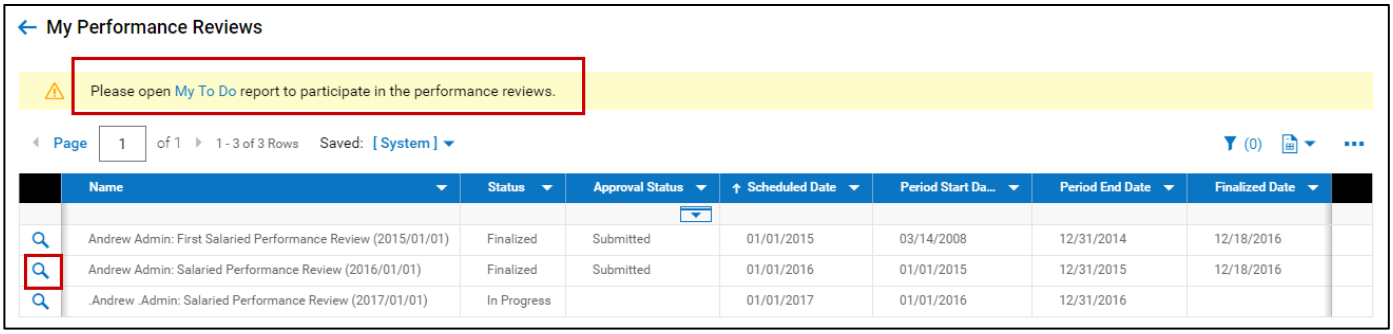
Under the Performance menu are two options to review and/or act on your performance reviews, and an option to view and/or set your goals.

Performance Reviews

My Info > My Career > Performance > Performance Review

Employee can view their performance reviews under this menu. The ability to take any action on a performance review is dependent the permissions granted by your company.

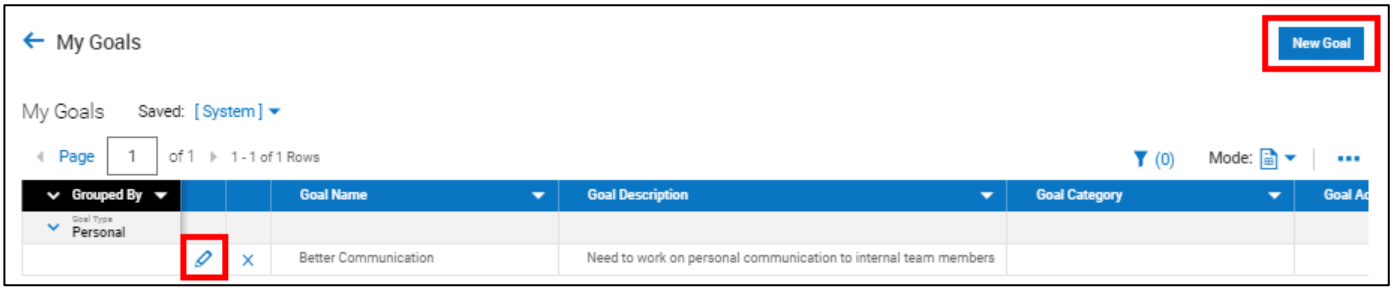
- Go to My To Do's to participate in a schedule Performance Review.
- Click the magnifying glass to review any reviews.



My Goals

My Info > My Career > Performance > Goals

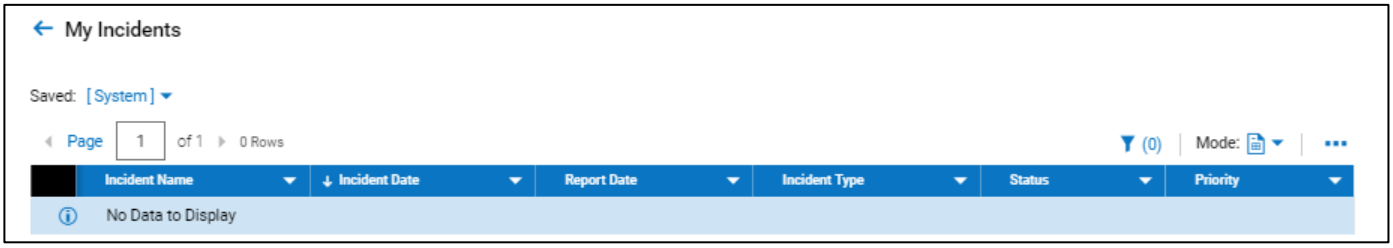
Employee can view performance goals created for them under this menu. The ability to take any action, such as creating, editing, or deleting goals will be determined by your company.



My Incidents

My Info > My Career > Performance > Incidents

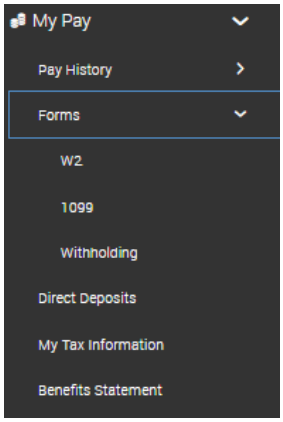
If your company has filed any incident reports (such as safety violations, accidents, etc.) they will display here.



My Pay

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 2. General Tasks***

From the main menu, you can access pay history information from the *My Pay* menu. Tap the *Pay History* menu option. The page will default to *Recent* pay histories and will display your last three (3) most recent pay histories.

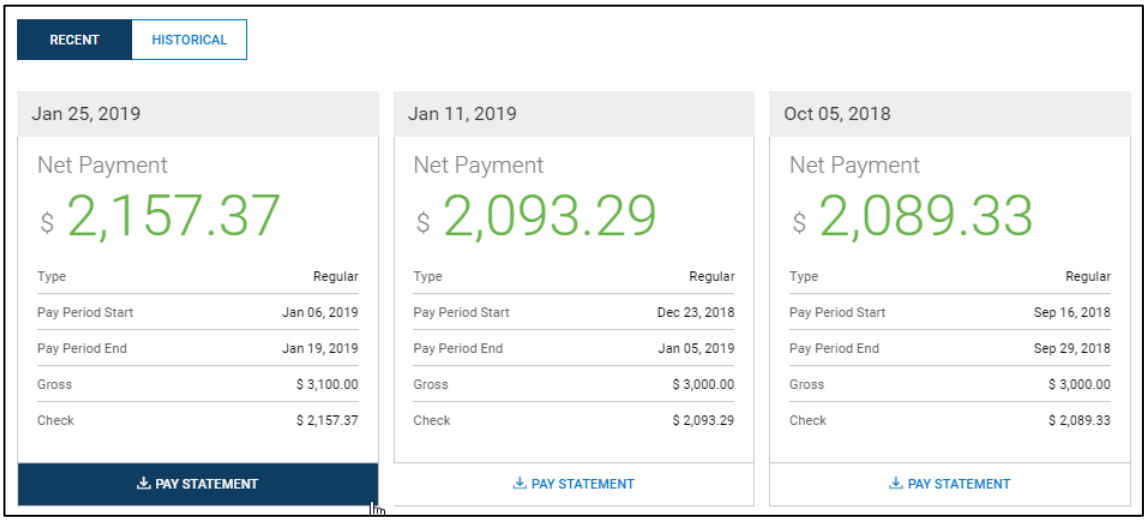


Pay History

My Info > My Pay > Pay History > Pay Statements

From the main menu, you can access pay history information from the *My Pay* menu. Tap the *Pay History* menu option. The page will default to *Recent* pay histories and will display your last three (3) most recent pay histories.

If your company has the *My Pay* widget on your *Home* page, you can perform many of the same options there.



You can tap the *Pay Statement* link and download the full pay statement for that entry.

On the *Historical* tab, you can enter a date range to view the pay statements for that range. Historical pay statements can also be downloaded via the *Pay Statement* link.

Tax Forms

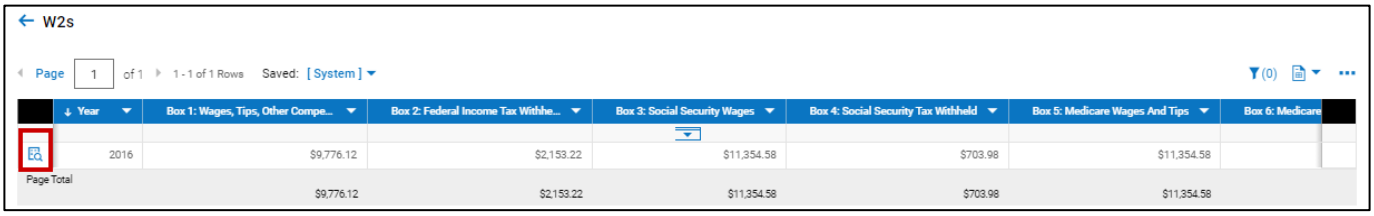
My Info > My Pay > Forms

Employee tax forms for viewing or action will be under this menu. Forms such as W2s, W4s, etc. may be under this menu.

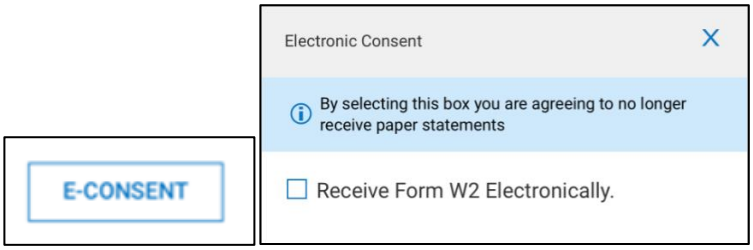
W2

My Info > My Pay > Forms > W2

Employees can download W2 forms and view W2 forms from the last seven years, provided that the tax year has been locked and signed off at the company or admin level and the employee's payroll history from prior years has been loaded into the system.



The form can be accessed from ***My Pay > Forms***. When enabled, or required, users can consent to receive the form electronically, instead of requiring a paper copy by clicking the *E-Consent* button. Users who choose this option will not receive paper copies of the forms unless they turn electronic consent off.



NOTE to Administrators: Electronic Consent can be enabled at the company level. Contact your CSR if you wish to have this enabled.

A list of available forms is shown under the W2 label with a download icon in each row. After providing consent to receive the W2 form electronically, a PDF file can be downloaded by clicking the download icon. The PDF will appear in a pop-up and can then be printed or saved.

1099

My Info > My Pay > Forms > 1099

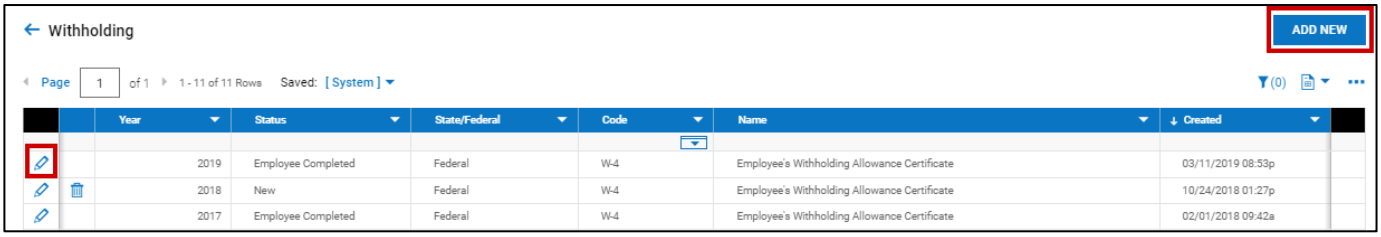
Employees can access tax form 1099-MISC and download PDFs of any 1099-MISC forms from prior years, provided that the tax year has been locked and signed off at the company or admin level and the employee's payroll history from prior years has been loaded into the system.

The form can be accessed from ***My Pay > Forms***. All available years appear in a list, with the year shown on the left and a download icon in the row on the right. A PDF file can be downloaded and viewed by tapping the download icon. Copy B, 2 and C will be downloaded in a single two-page file.

Withholding (W4 and State)

My Info > My Pay > Forms > Withholding

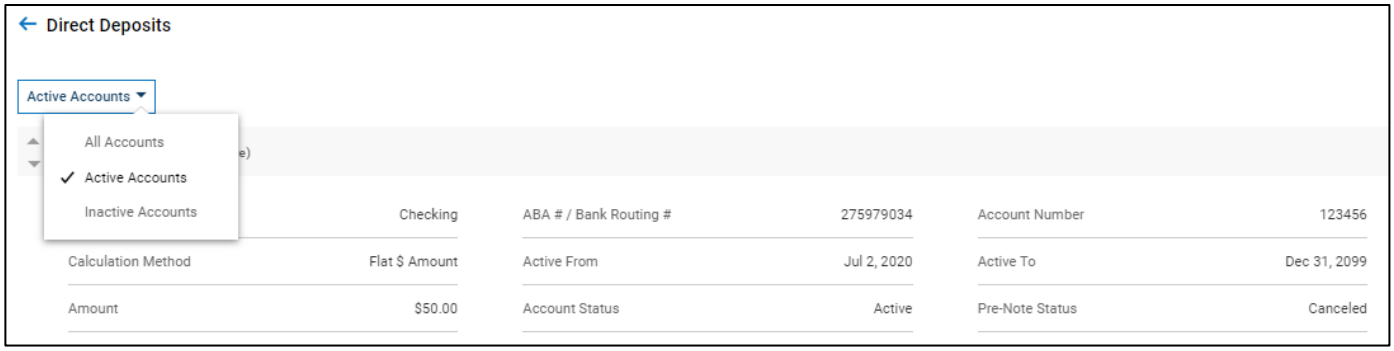
From here you can view/edit and add new State and Federal Withholding forms. To add a new form click Add New Withholding form and follow the prompts. When adding a new form, be sure to Submit the form when you have it complete. This will initiate and email for your manager to review and update/approve as neccessary.



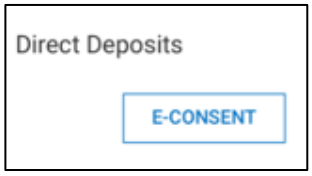
Direct Deposits

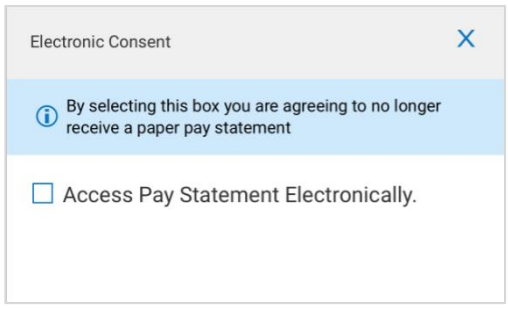
My Info > My Pay > Direct Deposits

From ***My Pay > Direct Deposits***, employees can view information about existing direct deposit accounts. On the *Direct Deposits* tab. Details of active and inactive accounts can be viewed by scrolling down. Using the drop-down, users can select whether to view *All Accounts*, *Active Accounts,* or *Inactive Accounts*. New accounts can be added by tapping the *Add* button and filling in the required fields. In addition, employees can also provide authorization to receive pay statements electronically instead of receiving paper copies.



The *E-Consent* button will allow employees to receive their pay statement electronically. Users who choose this option will not receive paper copies of the forms unless they turn electronic consent off.

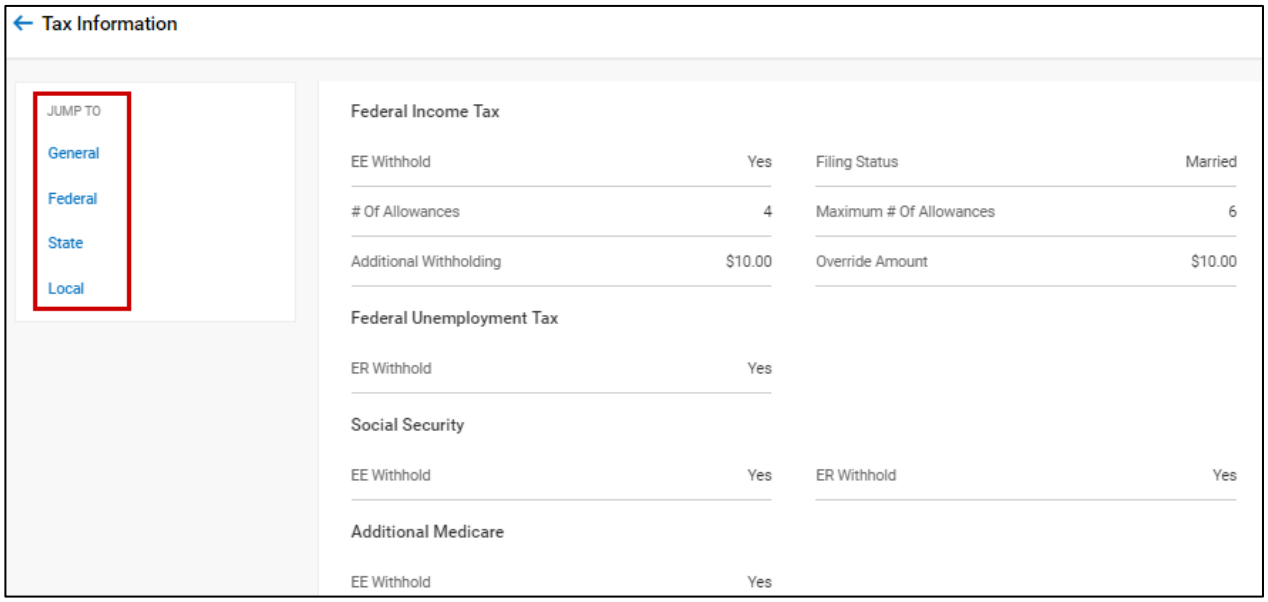




NOTE to Administrators: Electronic Consent can be enabled at the company level. Contact your CSR if you wish to have this enabled.

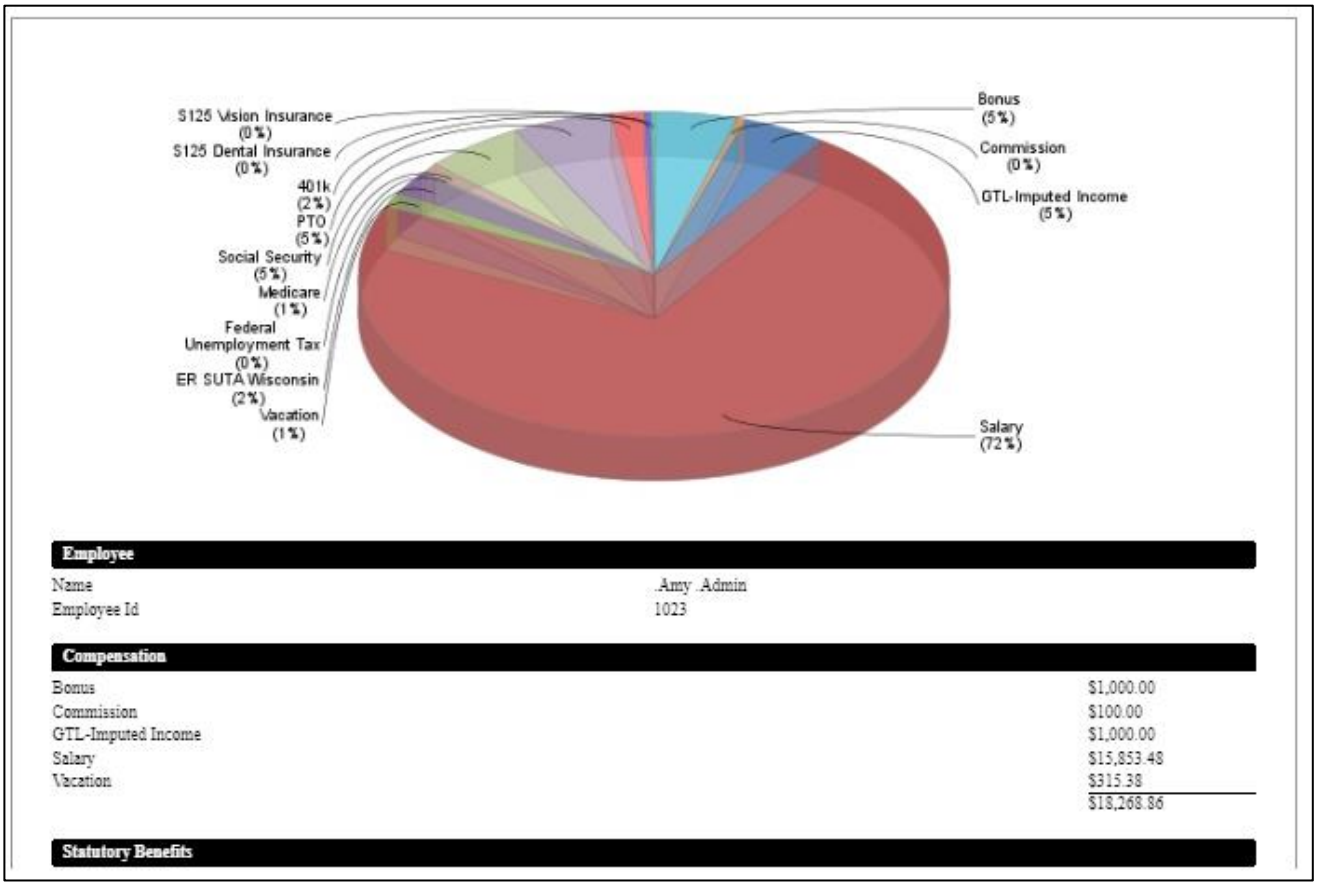
Tax Information

This area will display the employee's tax selections, such as withholding for Federal, State, and Local taxes.



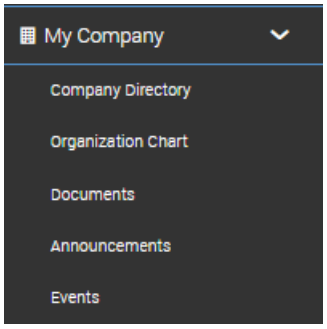
Benefits Statement

Employees can view a summary report of their benefits, by year, and opt to download the report as a PDF.



My Company

Under the My Company menu are options to view documents uploaded by your company.



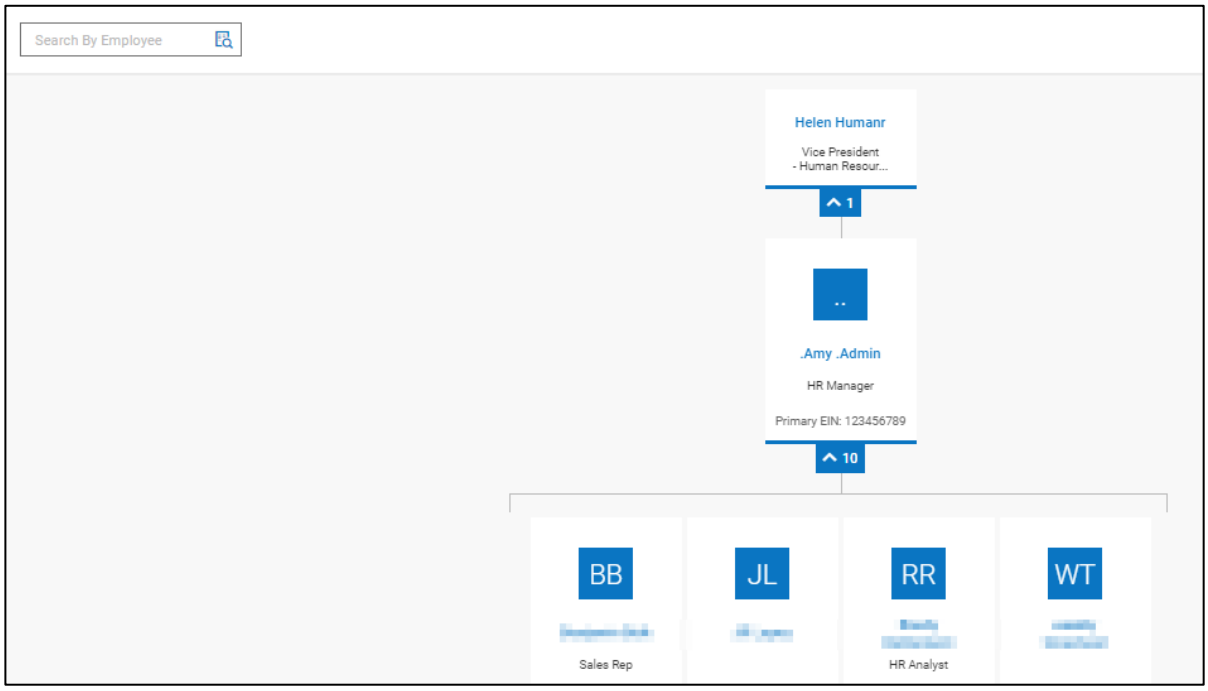
Company Directory

My Info > My Company > Company Directory

When enabled, you will see a listing of company employees and their contact information.

Organization Chart

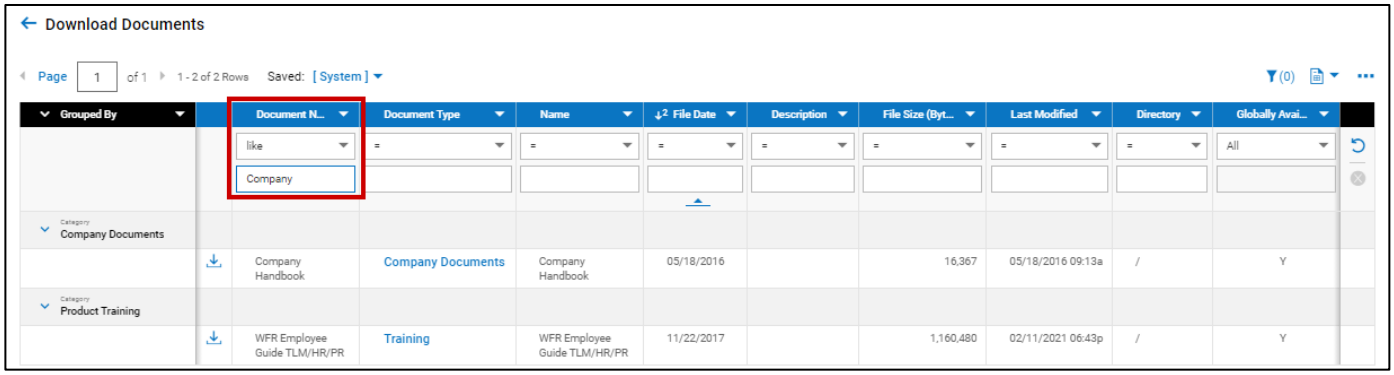
My Info > My Company > Organization Chart



Documents

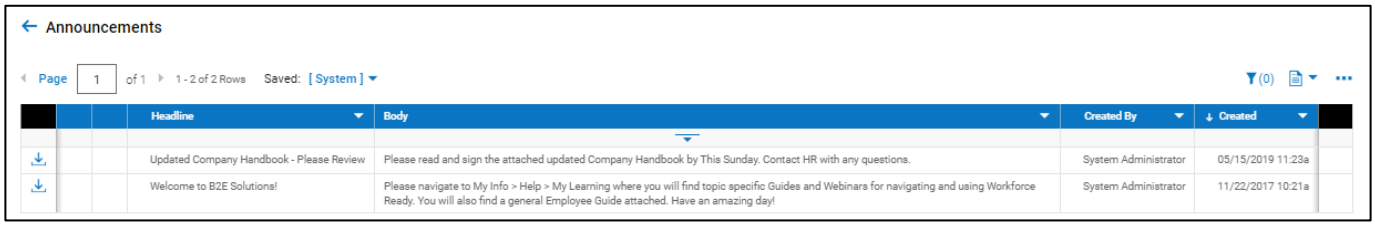
My Info > My Company > Documents

Under the Documents menu, your company may upload company-specific documents for you to access. Tap the download link next to a document to download a PDF of the document.



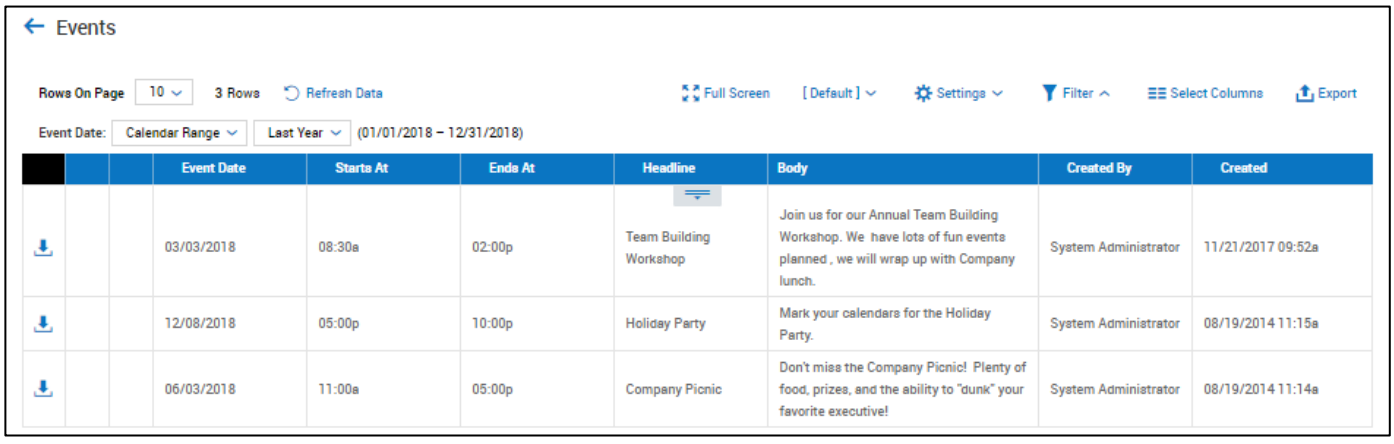
Announcements

My Info > My Company > Announcements



Events

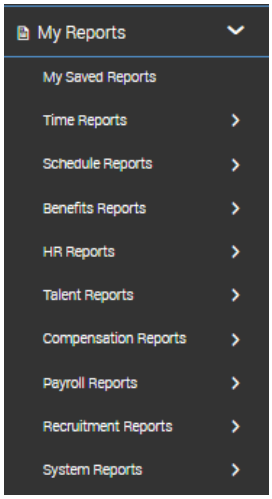
My Info > My Company > Events



My Reports

*For additional help on these topics (and more), go to **My Info > Help > My Learning (Classic) > Employee > 3. Working with Reports***

For users authorized to view reports, those reports will be available under My Info (single employee icon) in the *My Reports* menu. Under this menu are saved and scheduled reports, team reports, and functional areas and modules reports.



In most cases the users who will have access to reports will be managers and administrators. Employees seldom have access to reports but can be allowed to view them if security permissions allow.

Common Options in Reports

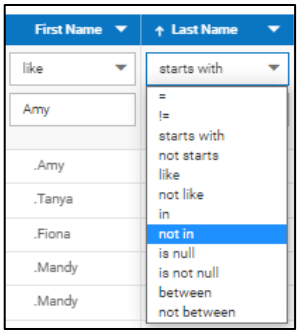
The options shown below are available across all reports and are presented here to help you familiarize yourself with the navigation of these options.

Manual Column Resizing

To manually expand a column, hover over the dividing line between columns until the double arrow displays and then click and drag the column to the desired width.

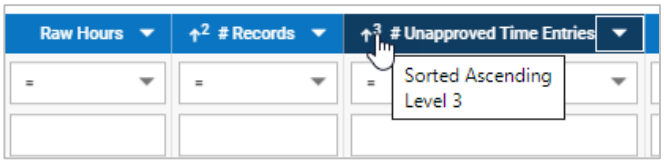
Inline Filtering

Report pages have filtering options known as inline filtering across each column on the page. Each column can be filtered with operators (=, !=, starts with, not starts, like, not like, in, not in, is null, is not null, between, no between) and then a value placed in the field below the operator.

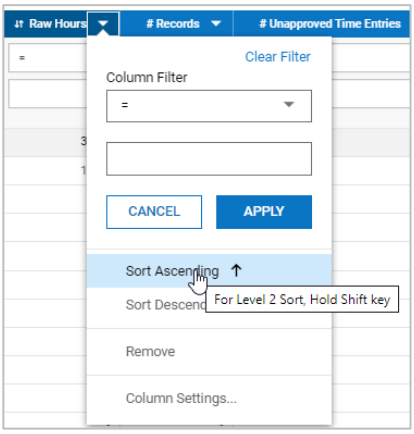


Inline Sorting

Clicking a column to apply filtering criteria, you will find tool tips when hovering over the *Sort Ascending* and *Sort Descending* text. The tool tip states you can hold the Shift key, click the option, and activate the next level sort. You can do this for multiple columns. In the report header, you will see the numbered columns indicating the sorting selections. You can hover over the number to see the applied sorting criteria.



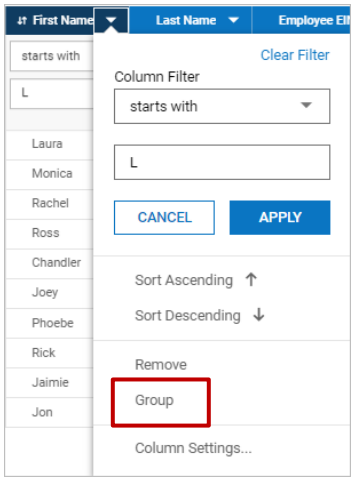
or

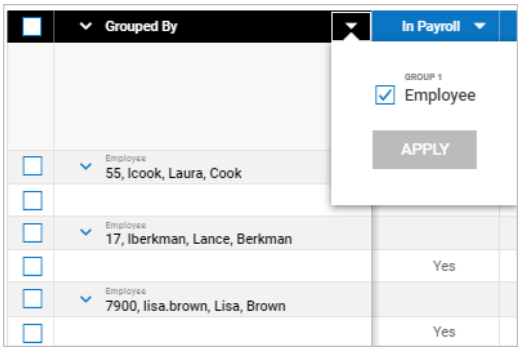


Columns can also be sorted by placing your cursor in the column heading until the double arrows display. Clicking the arrows will change or toggle the column in ascending or descending order.

Grouping

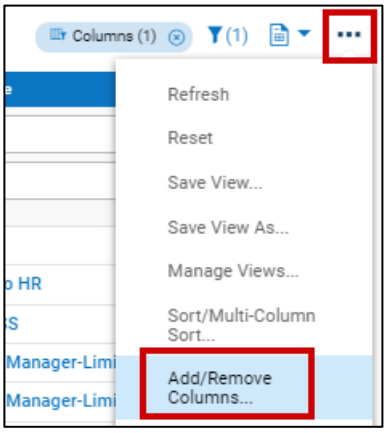
Other options are available to *Group* by the filtering criteria. Once grouped, the *Grouped By* column will display. The drop-down in this column will show the column used to perform the grouping. Unchecking the column and clicking *Apply* will ungroup the column. If employees are included in the *Grouped By* column, an Actions ellipse will display and when selected will display links to *Employee Information* and *Employee Quick Links*.





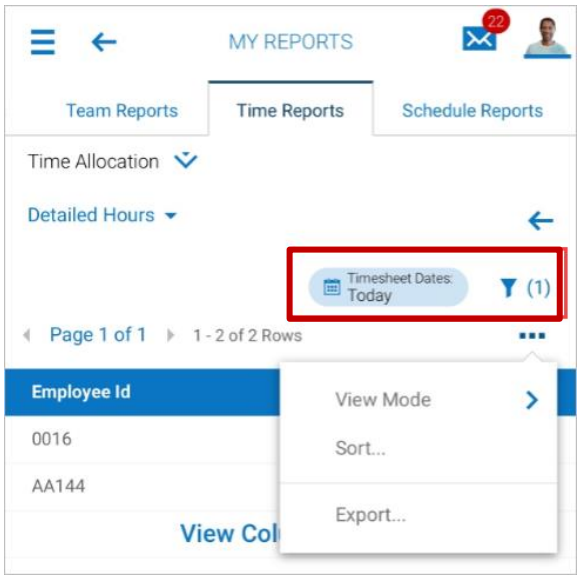
Adding/Removing Columns

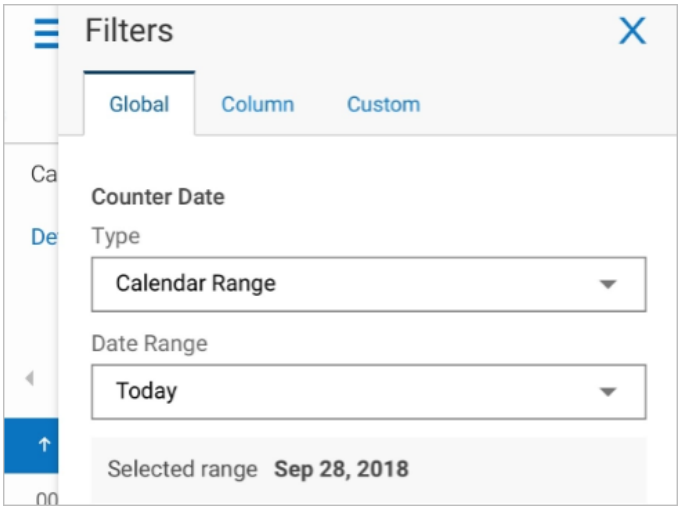
You can add, reorder, or remove columns in reports to see the information that is most relevant to you. From the triple-dot action icon in a report, select *Add/Remove Columns.* Click on the appropriate icons to add a column or remove a column. To quickly find a column to add, you can enter a few characters in the *Search* field. Tap the arrows to change the order of selected columns in the report.



Filters Icon

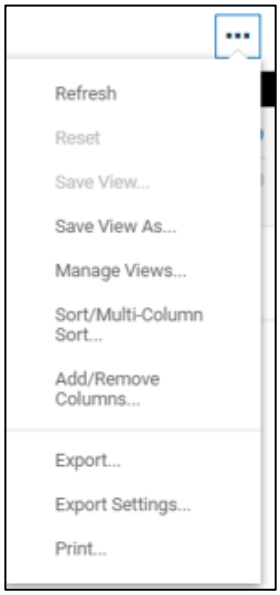
Under the funnel icon are multiple filtering options. Three columns are available: *Global*, *Column*, and *Custom*. These options can also be accessed from the filter selections next to the icon that displays the time period. The time period and date range can be selected from the dropdowns for *Type* and *Date Range*.





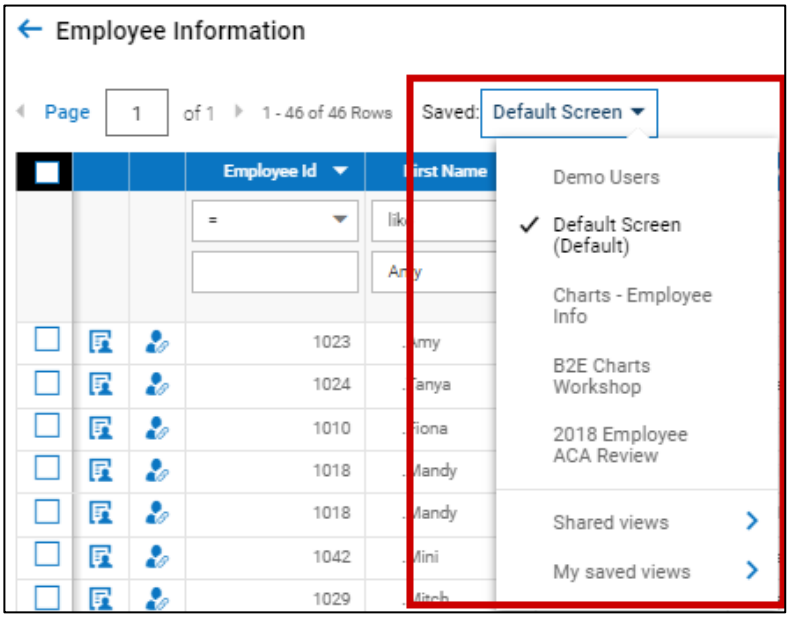
Saving Views and Exporting Report Data

To navigate to save, view or export a report, tap the ellipses above the blue bar on the report tab.



- **Save View & Save View As** - After tapping the Actions ellipses, the *Save View* and *Save View As* options are available. If the report has been modified, but not yet saved, the *Reset* option can be used to return to the default view. When saving a view, you must provide a name and can optionally add a description and tag. You can make the view the default, disable deletion of the view and share the view with other employees.
- **Manage Views** - The *Manage Views* option enables users to *Run* or *Delete* an existing view. The *Edit* option under *Manage Views* allows you to change the view settings, such as name or sharing.

- **Export & Export Settings** - Export settings including layout, margins, font size, page break, header and footer display, column name display, and totals display. The character used to populate fields that do not contain data can be selected as well. All columns are included in the export file by default, but the columns can be limited in the export settings.
- When a report has more than one view, the view selector is aligned with other controls in the report header.

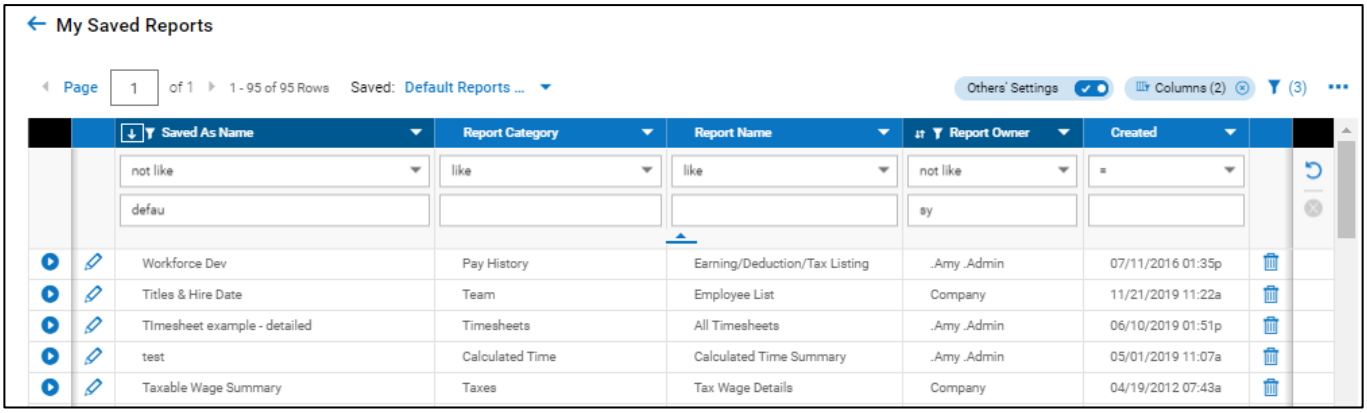


My Saved Reports

My Info > My Reports > My Saved Reports

Reports that have been saved for you or by you will display under the *My Saved Reports* menu. These saved reports can be run by tapping the *Run Icon* . Some reports will have additional options such as *Edit* and *Delete*.

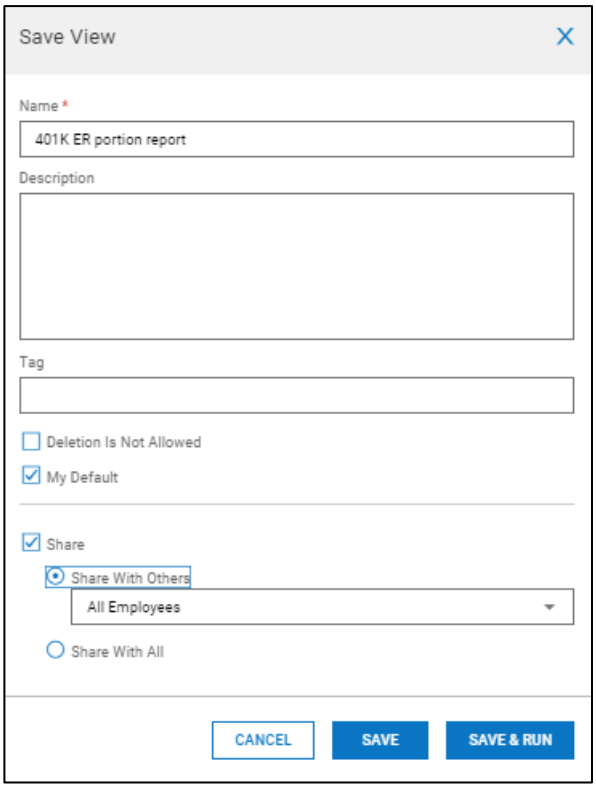
- The *Edit* option will allow you to adjust how the report is saved. The *Delete* option will remove the report from the saved list.



Edit – Saving/Sharing a Saved Report

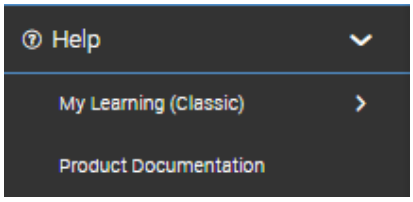
The *Edit* option will open a *Save View* page where you can edit the saved report. The name and description can be edited, and a tag name can be added. The report can be set to disallow deletion, make the report your default report, and share the report with others in your company.

- If selecting the *Share* option, you can select specific employees or choose to share will all employees.
- Once the settings are done, the report can be saved, or an option is available to save and run the report simultaneously.



Help

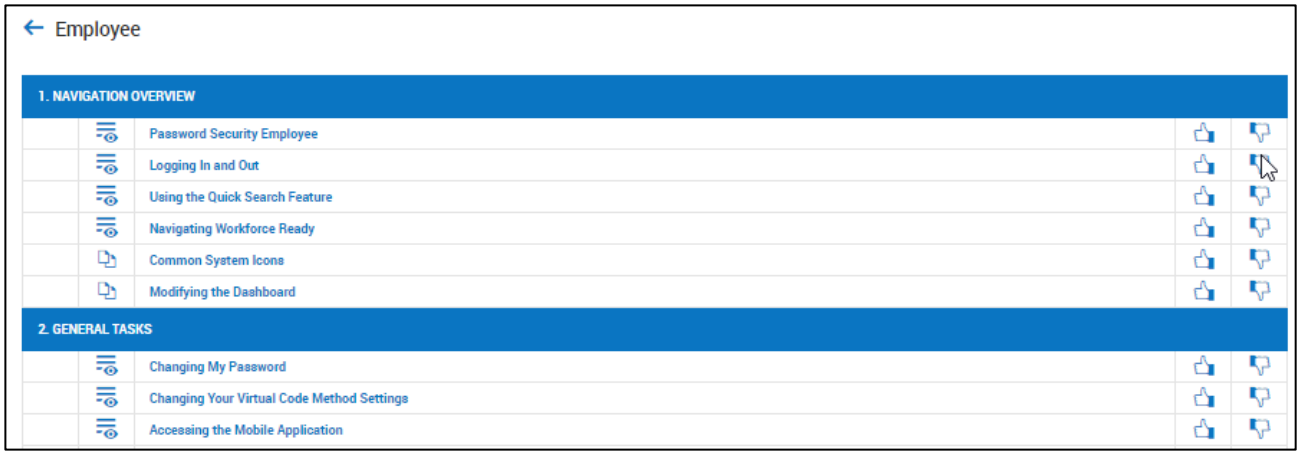
In this menu, your company may upload documents to help you learn certain tasks, or possibly create new content and links for training. These will be accessible under the *Product Documentation* option. Under this option, you can view and download documentation in PDF by tapping the download link next to each document. A separate browser will open to display the resulting PDF.



My Learning

My Info > Help > My Learning (Classic)

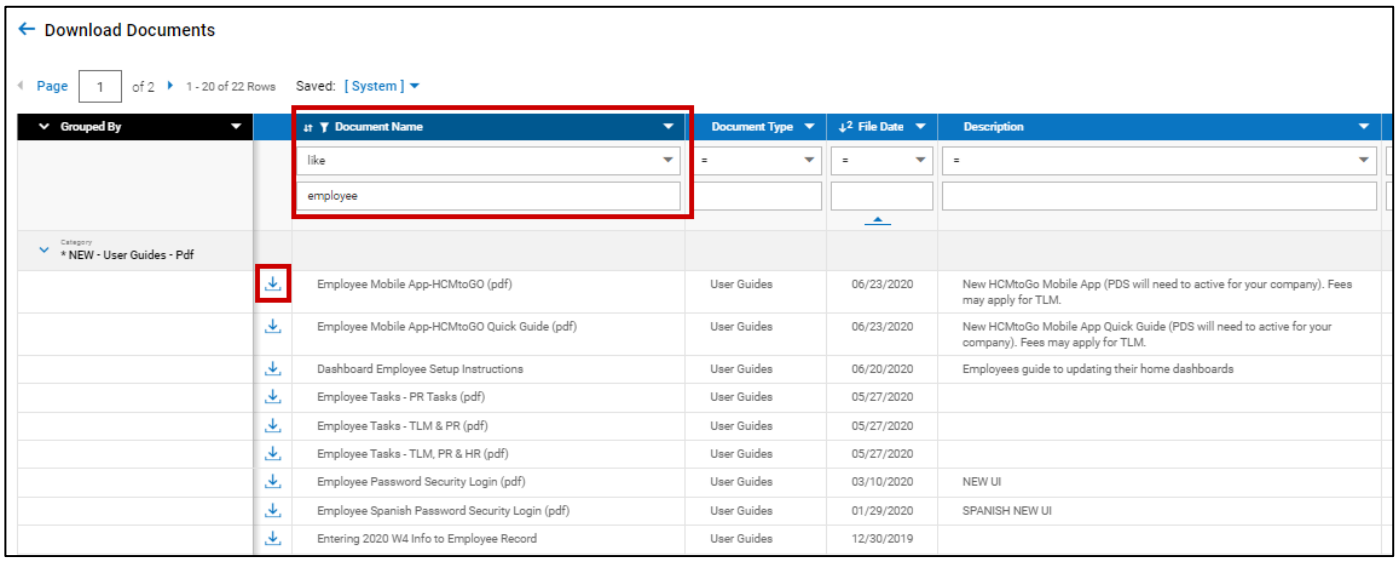
In this area you will find topic specific tutorials, webinars and job aids related to the system. Based on your access, you will find items ranging from Navigation, Employee, Managers and Admin access tools. Clicking on the icon to the left of the topic will open new window or download item for you to review.



Download Documentation

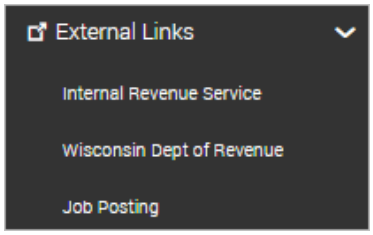
My Info > Help > Download Documentation

In this area you will find general User guides, Release Notes etc. related to the system. Based on your access, you will find items ranging from Navigation, Employee, Managers and Admin tools. Clicking on the icon to the right of the Item will download the item for you to review. You may also use the Search field in to search for desired items.



External Items/Links

The *External Links* are located under the *My Info* menu supports the use of externally linked URLs. Once defined, the external links will become active for the users assigned to the security profile. When activated, a separate browser will open, independent of the session.



NOTE to Administrators: External Links can be enabled at the company level. Contact your CSR if you wish to have this enabled or edited.

Report Charts & Dashboards

For additional help on these topics (and more), go to ***My Info > Help > My Learning (Classic) > Employee > 3. Working with Charts & Dashboards***

Within the system, charts can be added to any report to provide a graphical representation of report data.

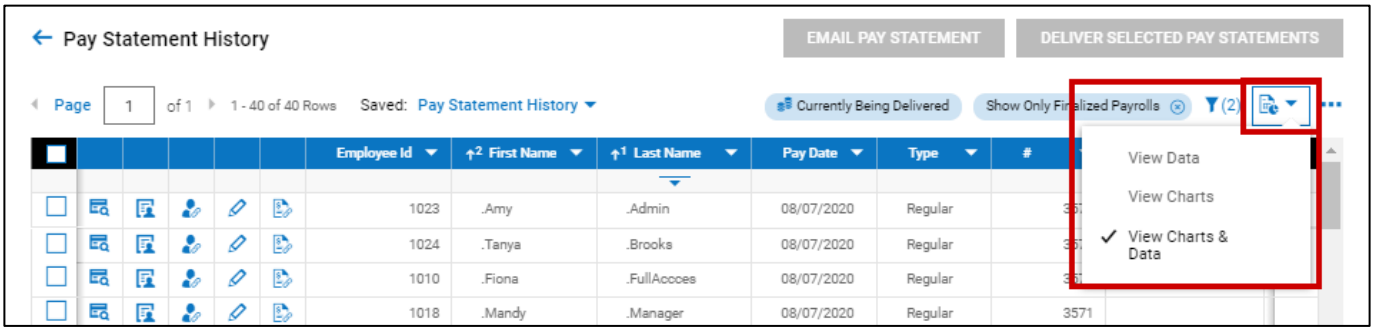
Things You Need to Know

- All charts created will reflect the complete report provided above it. For example, if there are six pages for a report and you are looking at only the first page, the charts will show data from all six pages.
- All charts will be filter based on the report as well. If the default date range for the report is *Today*, and then this is changed to *This Week*, all charts will instantly update along with the report.
- Charts are associated with report views. Once saved, and if you decide to share the report view, the charts will be shared with it.
- There is a maximum limit of 3 charts that can be viewed at one time for a single saved report view. However, you can switch out different charts that you have created.

View Mode

Navigate to a report and tap the *Actions* icon and select *View Mode*. Options are available to view the report as follows:

- **Data Only** – This is the normal default view of report data.
- **Charts Only** – This option will show your report only as a graphical chart.
- **Charts & Data** – This option will show both your default view at the top, with the chart view at the bottom.

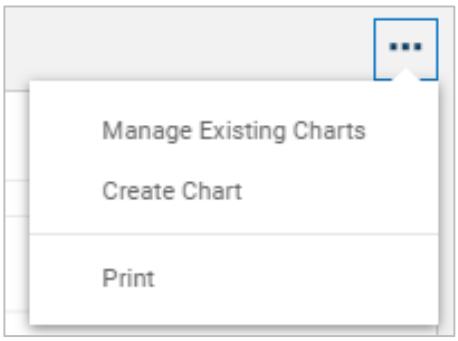


After making a view selection, the Mode option will display next to the *Actions* icon. The default will show *Data Only*.

Show Data Only *Show Charts Only* *Show Charts and Data*

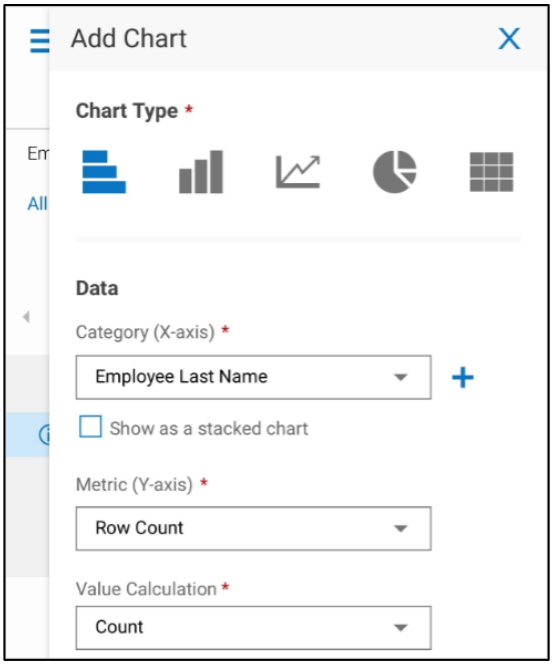
Adding and Selecting Charts

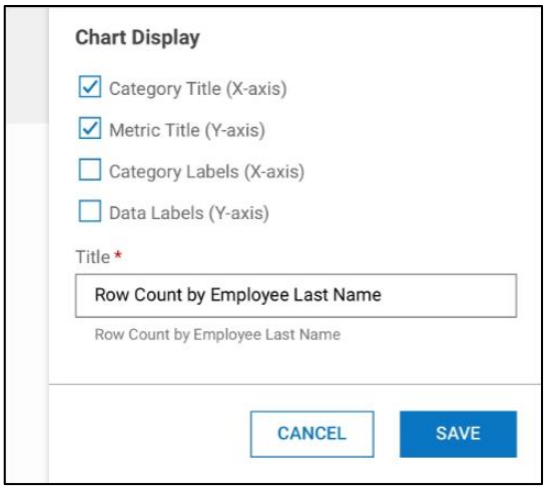
Once the chart panel is open, you can add or select an existing chart by accessing the options under the *Actions* icon. If you already have 3 charts in your view, the *Create Chart* option will not display.



Upon selecting *Create Chart* a side panel will open with options for creating a new chart. Select a Chart Type, Data metrics, Chart Display options and edit the title if you prefer a different one from the automatically generated one.

Depending which type of chart is selected will determine the type of data and metrics that can be selected, i.e., a Pie Chart will not contain an X or Y axis.



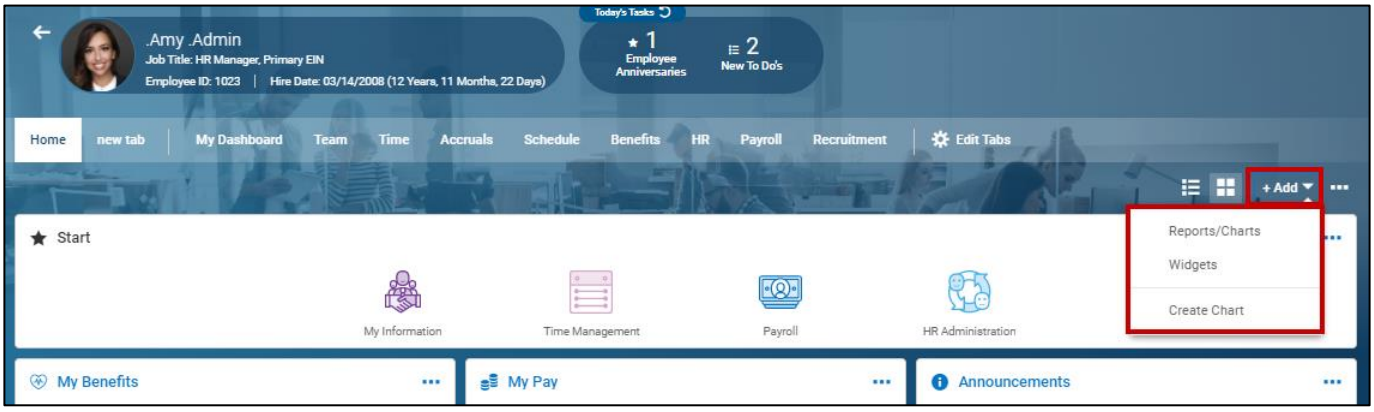


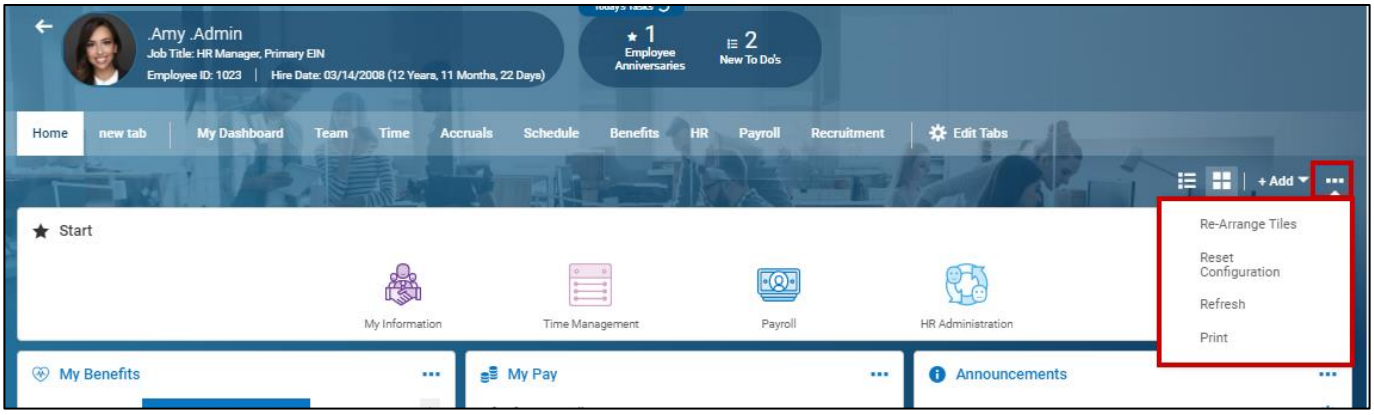
Once charts have been created and saved, they will be available for selection by choosing the *Manage Existing Charts* option.

Dashboards

The ability to create charts for reports allows for compelling at-a-glance visuals of your data. By providing the ability to add report charts from a variety of reports across the application within the home screen, dashboards bring important information to users upon logging in.

Users can customize their own dashboard experience directly from their home screen by adding report charts.





Things You Need to Know

- My Dashboard can be accessed via the *My Dashboard* tab upon logging in.
- There is a maximum limit of 9 charts, reports or widgets per single dashboard. This is the limit for My Dashboard as well as for module dashboards.
- Module dashboards are also available under each menu option within the Team menu. If a manager has the TLM Time menu, a Dashboard option will be available, and charts related to only time functions can be added. The same would be true for HR, Benefits, etc.
- When you have charts within dashboards, the title to each chart serves as a hyperlink which, when clicked, will send you to the report view it is sourced from. Each data point (*for example: single bar in a bar chart, single point in a line chart*) can be tapped which will send you to the filtered report based on the selection.