Automatic Data Processing, Inc.

ADP freedom

Setting up & maintaining Self Service

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Chapter 1 – Preparing to use Self Service

This chapter includes information and the tasks necessary for preparing ADP freedom so you can set up ADP freedom Solutions Self Service.

Table 1 - 1 – Preparing to use Self Service tasks

Task	Page	Required?
1 – Assemble your implementation team	1 - 3	Yes
2 – Establish your organisation objectives	1 - 4	Yes
3 – Evaluate employee education and equipment needs	1 - 4	Yes
4 – Review and update ADP freedom information	1 - 5	Yes
5 – Establish implementation task target dates	1 - 8	Yes
6 – Set up a Self Service administrator	1 - 8	Yes
7 – Set up a registration pass code	1 - 9	Yes
8 – Log on to Self Service for the first time	1 - 10	Yes

About Self Service

Self Service is a component of ADP freedom that your employees can use to view and, in come cases, update their personal and payroll information. You can configure Self Service according to your organisation's unique needs.

A typical Self Service page is displayed in the figure below to help you familiarise yourself with the basic components. You will get the opportunity to review all the Self Service pages when you log on to Self Service in **Task 8 – Log on to Self Service for the first time** which can be found on page 1 - 10.

Note: *Self Service employs the same basic components as ADP freedom with the exception that the middle frame, whilst used as the picklist frame in ADP freedom, is used to document help for the current page in Self Service. For more information on the basic components see the Getting Started guide.*
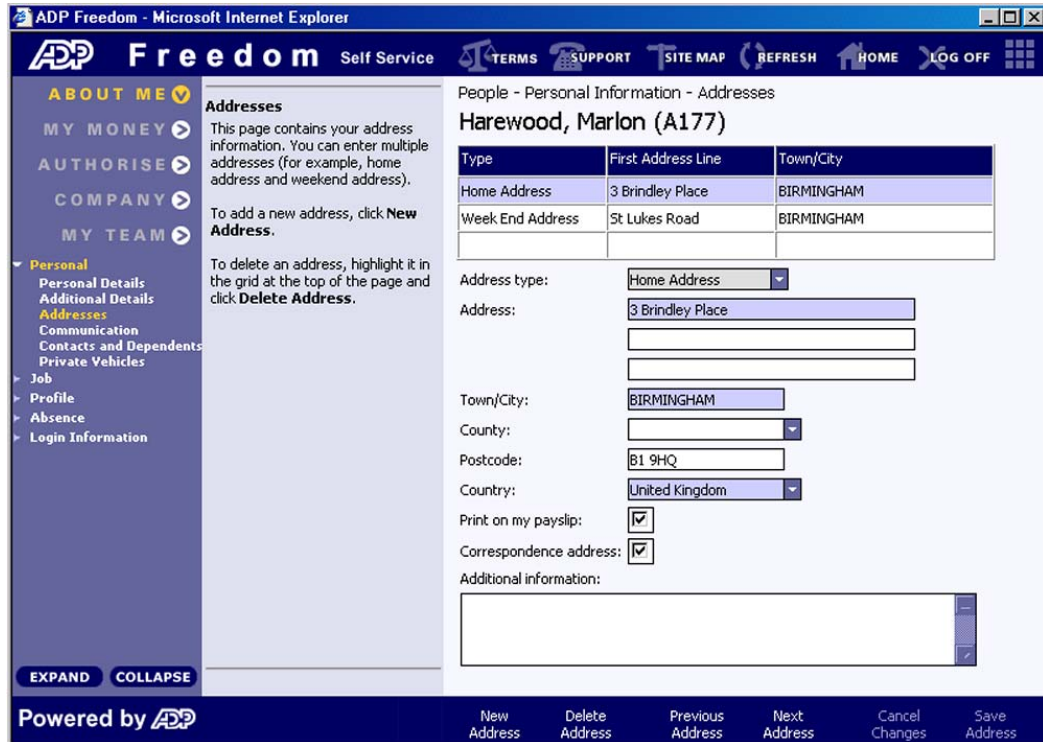
Figure 1 - 1 – ADP freedom Self Service

About this guide

This guide outlines the process for implementing Self Service in your organisation and provides some additional information for maintaining and supporting Self Service going forward.

Some tasks include planning and decision making exercises to help guide the thought process behind your implementation whilst other tasks involve steps that must be completed in ADP freedom to configure Self Service according to these planning decisions.

Who should read this guide?

To help guide you through the implementation process, the person or group responsible for completing each task is listed at the beginning of the task.

Your implementation team

Setting up Self Service is a team project. **Task 1 – Assemble your implementation team** discusses who should be included on this team. Your implementation team should make the planning decisions together since they impact all employees in your organisation.

Your Self Service administrator

ADP recommends you choose one or more Self Service administrators who are primarily responsible for the setup and management of Self Service within ADP freedom.

Note: *In a few security-related cases, an ADP freedom Super User or your ADP representative may need to be involved.*

Task 1 – Assemble your implementation team

Who performs the task: The person responsible for implementing Self Service in your organisation.

The following chart details the roles and responsibilities of the people you may want to include on your implementation team. As you organise your implementation team, keep in mind the importance of including people with human resources, payroll and information technology (IT) experience. After you organise your team, select a team leader to act as the group facilitator and to serve as the primary ADP contact.

Table 1 - 2 – Implementation team roles

Team member	Responsibilities	Suggested experience/skills
Employee	o Provide employee's perspective to identify Self Service content	o Using the internet/intranet
HR generalist	o Identify Self Service content	o Using ADP freedom with full access to HR information o Using the internet/intranet
IT, Local Area Network (LAN), or Web administrator	o Troubleshoot browser and connectivity issues o Set up employee workstations with browsers and internet or intranet access	o Building, administering and maintaining the physical network infrastructure o Setting up and maintaining web servers and web security
Line manager	o Provide manager's perspective to identify Self Service content	o Using the internet/intranet
Payroll manager	o Identify Self Service content	o Using ADP freedom with full access to payroll information

Team member	Responsibilities	Suggested experience/skills
		o Using the internet/intranet
Self Service administrator	o Set up and maintain Self Service o Set up and support employees who use Self Service	o Using ADP freedom o Using the internet/intranet o Managing websites

Task 2 – Establish your organisational objectives

Who performs the task: Implementation team

Before you set up Self Service, your implementation team must agree on your organisation's objectives for using Self Service. Possible objectives can be the following:

- To improve service to employees and managers

- To streamline processing steps, such as obtaining approvals for changes to employee information

- To provide managers with access to employee human resources information.

Prioritise your objectives

After you determine your company objectives, prioritise them in order of importance. This exercise will help the implementation team focus on achieving the objectives that are most important to your company.

Plan to track your decisions and changes

Use either a paper or online document to track all the decisions you make and changes you plan to implement. You may also want to keep a binder for your completed worksheets. These documents will serve as a resource for future decisions and changes.

For example, if you decide to remove the Self Service **Memberships** page because you are not currently using this feature in ADP freedom, you should make a note of this decision, including the date the decision was made, who made the decision, and the reason it was made.

In the future, if you are considering adding this page back into Self Service, you will have a record of your reasons for removing it.

Task 3 – Evaluate employee education and equipment needs

Who performs the task: Implementation team

Education needs

To use Self Service, your employees need some basic computer skills including introductory computer, mouse, and internet browser training. Consider your employees and determine if you need to provide any training.

Equipment needs

To set up and use Self Service, your employee workstations must comply with certain hardware and software requirements. Review the following table to determine which system requirements are necessary and then evaluate whether your employee systems meet these requirements. If not, you may need to upgrade their software or hardware.

Table 1 - 3 – Employee equipment needs

This employee	Uses this software	The employee's workstation must comply with these requirements
Self Service administrator(s)	ADP freedom	ADP freedom system requirements
Employees and managers	Self Service	Self Service system requirements

You can find both requirements lists on the ADP freedom Help page of the ADP freedom Solutions Service Centre.

Develop a plan to meet these needs

After you evaluate your employees' skill and equipment needs, develop a plan to address these needs, if any. Consider including the following tasks in your plan:

- Place orders for necessary hardware and software

- Research and select training options

- Schedule employees to attend necessary prerequisite training classes.

Task 4 – Review and update ADP freedom information

Who performs the task: Self Service administrator with help from other ADP freedom users with access to this information.

Where to start the task: Reports provided by your ADP representatives.

Why review and update the ADP freedom information?

Before you give your employees access to Self Service, the information in ADP freedom must be reviewed and updated. This exercise is important for several reasons:

- You want your employees to see accurate and up-to-date information in Self Service so they have confidence in using this new resource.

- You want your employees to understand the information they see so it must be presented in language they understand.

- You want your employees to see only the information they are entitled to see, so your **Reports to** structure must be accurate.

Important: Once you have completed your updates of this information, it is important that all ADP freedom users are aware of the importance of maintaining the accuracy of the information in ADP freedom.

How to review the ADP freedom information

Your ADP representative will provide you with reports to help you review most of the information. You will need to review a few things online. Once you complete your review of the current information, correct any problems before you give your employees access to Self Service.

What information do I need to review?

Focus your initial review on the following areas of ADP freedom. Once you have reviewed these areas, you can certainly review any other ADP freedom information until you are comfortable.

Reports to field for all employees

The **My Team** access point in Self Service gives managers access to information about their employees. For example, on the Self Service **My Team > Personal > Communication** page, managers can view and update phone and email information for all employees reporting to them (for example, the chairman can view information for all employees in the company). If employees do not have anyone reporting to them, the **My Team** access point is not available to them in Self Service.

The **Reports to** field on the **People > Appointment & Rates > Appointment** page should contain the name of the employee's current manager. That manager is then able to view the employee's details.

There is also a **Reports to** field on the **Company > Position > Position Details** page.

If no value is entered in the **Appointment Reports to** field that employee's records will be accessed in Self Service by the manager(s) holding the position named in the **Position Reports to** field (if there is any).

If both the **Appointment Reports to** and the **Position Reports to** fields are completed, the **Appointment Reports to** field will override and the manager named in the **Appointment Reports to** field will be able to access the employee's records on Self Service.

Important: If the **Reports to** field contains the wrong person's name, the employee will have access to the other employee's information in Self Service. If this field is empty, the employee's manager cannot see information about this employee in Self Service.

Employee Status field for all employees

You can confirm whether an employee is allowed or prevented from accessing Self Service based on the **Employee Status** field.

Available **Employee Status** options can be viewed on the **System > Self Service > User Access Control** page. Select the **Status Code** from the grid at the top of the page. If the **Access to Self Service** checkbox is checked all employees with that employee status have access to Self Service. Assignment of access based on employee status is determined at setup by the ADP Implementation Consultant.

Personal Email Addresses field for all employees

Using the **Notification** feature of Self Service, you can automatically send email messages to your employees to inform them of changes made by other employees or to update them on the status of their changes. These emails are sent to the address in the **Personal Email** field.

Important: If the **Personal Email** field is empty or incorrect, email messages will not be received.

Therefore, review the **Personal Email** field on the **People > Personal Information > Communication** page for each employee to make sure that it contains the correct email address.

Tip: Because employees can also update their personal email address on the Self Service **Communication** page, some companies choose to have their employees update this information as a simple exercise to introduce them to Self Service. After a specified period of time, check that your employees have completed this field and follow up with those who have not.

For more information on notification, see **Chapter 3 – Setting up notification and authorisation** on page 3 - 1.

Company and Enterprise lookup tables

In Self Service, your employees need to understand the information that is displayed so they can make the proper selections when updating information. If descriptions are not clear, the information will be difficult to understand and your employees might make incorrect selections.

Therefore, on the **Company > Company Setup > Lookups > Company Lookups** and **Enterprise Lookups** pages, review the **Description** field for each

code that is meaningful to your employees. For example, if you use an acronym or abbreviation (ISTC), make sure you spell it out (The Institute of Scientific and Technical Communications).

Person IDs for ADP freedom users

On the ADP freedom **User Setup** page, you can link an ADP freedom person ID to the selected ADP freedom user. Doing this allows ADP freedom and Self Service to recognise the user as the same person. Then, the ADP freedom user can use the same user ID and password for security purposes.

Note: *When switching from Self Service to ADP freedom, employees must enter their user ID and password for security purposes.*

1. In the menu list, select **System > Management > User Setup**.

2. In the picklist, select a user.

3. On the **User Setup** page, click the **Assign** button.

4. Search for the person ID by either the employee's last name, business unit or job title and click **Next**.

5. Search the employee you want, click **Next**, and click **Finish**. The selected user's person ID is displayed in the **User's Person ID** field.

6. Click **Save User**.

7. Repeat steps 2 – 6 for each ADP freedom user who will also use Self Service.

Task 5 – Establish implementation task target dates

Who performs the task: The person responsible for implementing Self Service in your organisation.

After you assemble your implementation team, use the *ADP freedom Solutions Self Service Implementation Schedule* provided by your ADP representative during the project planning meeting to assign, schedule, and track your implementation tasks.

Task 6 – Set up a Self Service administrator

Who performs the task: ADP freedom Super User

Where to start the task: ADP freedom

Your Self Service administrator needs to be set up as an ADP freedom user with access to the Self Service menu items.

Is your Self Service administrator a current ADP freedom user?

- If yes, add the Self Service menu items to the list of pages this person can access.

> **Note:** *If your Self Service administrator is already an ADP freedom Super User, you do not need to add any menu items.*

- If no:
  - Set up your Self Service administrator as an ADP freedom user.
  - Assign the Self Service administrator role to this user.

For instructions on completing either of these tasks, see **Setting up users and user security** in the *Implementation* guide.

Important: To see the **About Me, My Money, Authorise, and Company** pages, your Self Service administrator needs to be set up as an employee of your company in ADP freedom. To see the **My Team** pages, another employee must have your Self Service administrator's name selected in the **Reports to** field on the **Appointment** page. For more information on the relationship between the **Reports to** field and the **My Team** pages, see **Reports to field for all employees** on page 1 - 6.

Task 7 – Set up a registration pass code

Who performs the task: Self Service administrator

Where to start the task: ADP freedom

About the registration pass code

The registration pass code consists of your ADP client ID which is your company's unique character code (provided by ADP and displayed automatically in ADP freedom) followed by a hyphen and up to 100 alphanumeric characters of your choice. For example, a sample registration code could be:

ABC-123def (where ABC is your ADP client ID and 123def are the alphanumeric characters you enter).

Important: The code is case-sensitive.

How to set up a registration pass code

1. In the menu list, select **System > Management > Client Details**.
2. In the picklist, select the company.
3. In the Self Service **Registration pass code** field, enter up to 100 alpha or numeric characters to complete your company's pass code.
4. Click **Save Client**.

Important: If you subscribe to another ADP internet product that also has a Self Service component, the code may already be displayed in the **Self service registration pass code** field. If you change the code, you must notify other system administrators in your company of the change.

Task 8 – Log on to Self Service for the first time

Who performs the task: Self Service administrator

Where to start the task: Self Service

To confirm that the previous tasks have been accomplished successfully and to see the registration process and Self Service for yourself, you should register yourself and log on to Self Service. After you log on to Self Service, you are also able to refer to the application as you make decisions and test any changes you make during the rest of your Self Service implementation.

How to log on to ADP freedom Self Service

Before you begin: To log on to Self Service you need the Self Service URL and the registration pass code you created in **Task 7 – Set up a registration pass code** on page 1 - 9.

1. Open your web browser and enter the URL for Self Service.

2. On the ADP freedom login page, click **Register Now**.

3. Follow the instructions on the screen to complete your registration and start the Self Service application.

Chapter 2 – Customising Self Service

This chapter includes information and instructions for customising ADP freedom Solutions Self Service.

Table 2 - 1 - Customising Self Service tasks

Task	Page	Required?
1 – Customise the Welcome page	2 - 1	Yes
2 – Set up employee and manager security	2 - 3	Yes

Task 1 – Customise the Welcome page

Who performs the task: Implementation team and Self Service administrator

Where to start the task: ADP freedom

When your employees log on to Self Service, the first page they see is the **Self Service Welcome** page. You can customise the company logo, website links, support link, and company information area.
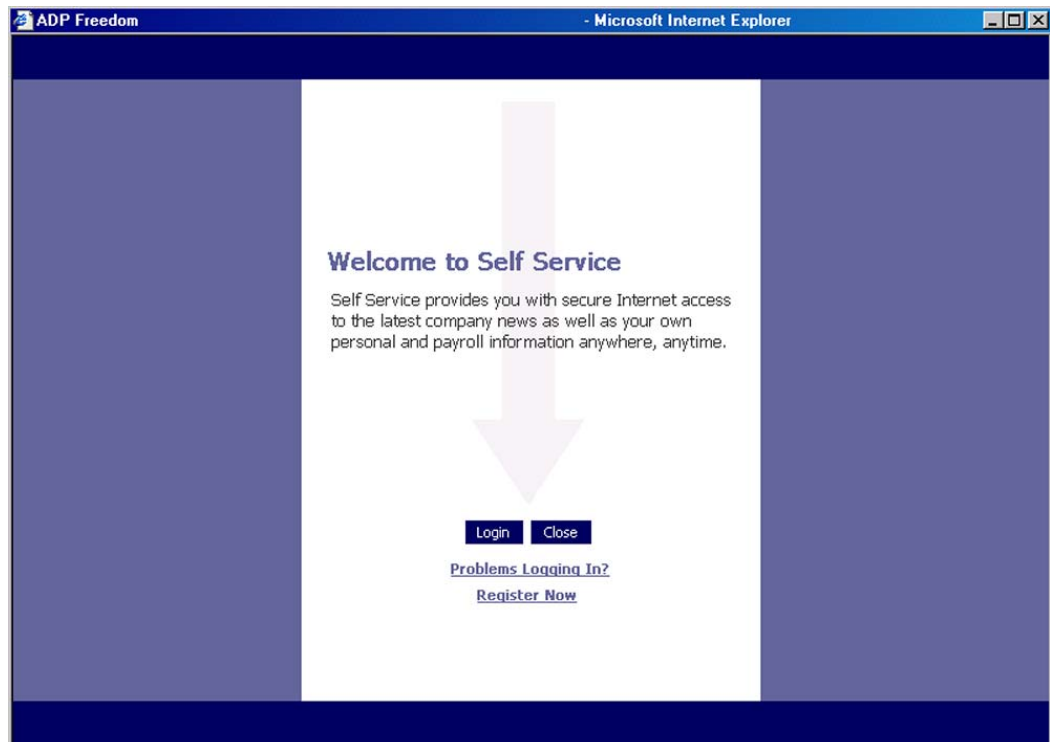
Figure 2 - 1 – Self Service Welcome page

How to add your company logo

Before you begin: To use your company logo in Self Service, the logo must be 340 by 33 pixels in size and saved in JPEG (*.jpg) format on the shared network drive.

4.   In the menu list, select **System > Self Service > Self Service Graphics**.

5.   In the Self Service banner area, click **Browse** and then select your company logo.

6.   Click **Upload** to copy the graphic to the web server.

7.   Position your cursor over **Test Display** to make sure that the logo looks the way you want it to look in Self Service.

8.   Select the **Use graphic** checkbox to insert the new graphic in Self Service.

9.   Click **Save Setup**.

How to set up employee and manager support contacts

Your employees may need support to resolve problems and reset passwords. Depending on the size of your organisation, your existing Self Service administrator(s) may be able to provide this support. If your organisation already has a help desk, you may want to consider training these employees as Self Service administrators. ADP Support is available to help your support team troubleshoot any problems your employees may encounter.

Whenever your employees or managers click the **Support** icon at the top of Self Service, a blank email window is displayed. You need to determine to whom these email messages will be sent. You can have a different support contact for employees and managers, or you can use the same contact for both.

How to set up email support addresses

1.   In the menu list, select **System > Self Service > Self Service Setup**.

2.   In the **Employee contact** area, select the employee who will receive email support questions from employees.

3.   In the **Manager contact** area, select the employee who will receive email support questions from managers.

   Tip: You can enter the same email address in both fields.

4.   Click **Save Setup**.

How to add website addresses to the Activity List

You can create links to up to four websites which display in the area at the bottom of the **Activity List** on the **Self Service Welcome** page.

Note: *When your ADP freedom users log on to Self Service, a link to ADP freedom is also displayed in this area. For more information on setting up this option, see **Person IDs for ADP freedom users** on page 1 - 8.*

1. In the menu list, select **System > Self Service > Self Service Setup**.

2. In the company web addresses area, do the following:

   a. In the first **Web address** field, enter the URL for the first website you want to set up (for example, www.adp.com).

   b. In the corresponding **Display text** field, enter a meaningful description of the website. For example, If you enter a link to your company's intranet site which your employees know as WISMO, you might type 'Go to WISMO' in the **Display text** field.

3. Repeat the above step for up to 3 additional websites.

4. Click **Save Setup**.

How to add information to the Company information area

Use the **Company information** area on the Self Service **Welcome** page to communicate information to your employees. For example, if you have scheduled a company holiday party, you could put the announcement in this area.

1. In the menu list, select **System > Self Service > Self Service Setup**.

2. In the **Company information** area, enter the text you want to display in the **Company information** area on the Self Service **Welcome** page.

3. If necessary, use standard HTML codes to format the text. For example:

   - <h1>Title or heading of your message</h1>

   - <p>Paragraph or body text of your message</p1>

   For more information on standard HTML codes, see the World Wide Web Consortium (W3C) website at http://www.w3.org/.

4. Click **Preview information** to see how the text will display on the Self Service **Welcome** page.

5. After you are satisfied with the content and format of the text, click **Save Setup**.

Task 2 – Set up employee and manager security

Who performs the task: Implementation team and Self Service administrator

Where to start the task: ADP freedom

Associated worksheets: Site Map Worksheet

What are the default security settings?

The default security settings are different for the two groups of Self Service users. These users are divided into two groups based on whether or not employees report to them.

Table 2 - 2 – Self Service security groups

These employees	Belong to this group
Employees without employees reporting to them	Employee
Employees with employees reporting to them	Managers

Important: Managers have employees reporting to them if their name is selected in another employee's **Reports to** field on the ADP freedom **Appointment** page or where an employee occupies a position that has other positions reporting to it.

Default security settings for employees

Employees who do not have any employees reporting to them can:

1. See all pages in the **About Me**, **My Money**, **Authorise,** and **Company** access points in Self Service unless you hide them.

2. Change the information on any of the changeable pages.

3. Add new records to changeable pages.

4. Delete existing records from changeable pages.

5. View salary information on their own pages.

Default security settings for managers

Managers who have employees reporting to them can:

1. See all the pages in the **About Me**, **My Money**, **Authorise**, **Company** and **My Team** access points in Self Service unless you hide them.

2. Change the current information on any of the changeable pages.

3. Add new records to changeable pages.

4. Delete existing records from changeable pages.

5. View salary information on their own pages.

What security settings can I change?

You can limit employee and manager access to information in Self Service in the following ways:

1.   Hide Self Service pages you do not want employees to see.

2.   Prevent employees from changing information on specific pages.

3.   Prevent employees from clicking **Delete**.

4.   Prevent employees from clicking **New**.

5.   Hide salary related information.

6.   Require someone to authorise employee changes before they are saved in ADP freedom. For more information, see **Chapter 3 – Setting up notification and authorisation** on page 3 - 1.

Complete the Site Map Worksheet for employees and managers

Before you begin: Print two copies of the **Site Map Worksheet** located in **Appendix A**. Write **Employee** at the top of one copy and **Manager** at the top of the other copy. On the **Employee** copy of the **Site Map Worksheet**, cross out the **My Team** module.

1.   Log on to Self Service. For instructions on logging on to Self Service, see **Task 9 – Log on to Self Service for the first time** on page 1 - 10.

2.   Review each Self Service page and, as you do, record the following decisions on the appropriate copy of the **Site Map Worksheet**:

   •   Cross out any access points, menu items, or pages you want to hide from the employees or managers.

   •   In the **Allow updates?** column, select **Yes** if you want the employees or managers to change the information in any of the changeable fields on the page. Otherwise, select **No** to prevent employees from changing these fields.

   Tip: If you are concerned about employees or managers changing information but you do not want to prevent them from making the change, you can allow employees to make changes and then require someone to authorise these changes before they are saved in ADP freedom. Or, you can notify someone that the change has been made. For more information, see **Chapter 3 – Setting up notification and authorisation** on page 3 - 1.

How to set up employee and manager security

Before you being: Complete a **Site Map Worksheet** for your employees and one for your managers. For instructions see **Complete the Site Map Worksheet for employees and managers** on page 2 - 5.

1.   In the menu list, select **System > Management > User Security**.

2.   In the picklist, select **Employee**.

3.   In the **User access/restriction** area, do the following:

   •   To prevent employees from deleting records, click to clear the **Allow delete** checkbox.

   •   To prevent employees from adding records, click to clear the **Allow add new** checkbox.
   Note: *Refer to the* **Add/Delete Available** *column on the* **Site Map Worksheet** *for a complete list of pages where employees can add and delete information.*

4.   In the **Data security group** area, click to clear the **Show data group salary** checkbox to prevent employees from seeing the following salary-related pages and fields in Self Service.

Table 2 - 3 – Fields hidden on Self Service pages

Self Service Page	Fields Hidden
About me > Job > Appointment	• **Base Rate** • **Grade**
My Money > Payroll Information > Payslip view	Entire page is hidden
My Team > Job > Pay rates	Entire page is hidden
My Team > Payroll Information > Earnings	Entire page is hidden
My Team > Job > Appointment	• **% in Grade** • **Base Rate** • **Budget** • **Compa Ratio** • **Compensation** • **Grade** • **Quartile** • **Total Position**

5.   In the **Menu Profile Definition** area, click an access point.

6.   In the **Security Assistant Menu Profile Definition** window, click the plus sign (+) to reveal the menu items and pages associated with the selected access point.

7.   Referring to your completed employee **Site Map Worksheet**, do the following:

- To the left of the menu item, click to clear any pages you do not want employee to see in Self Service.

- To the right of the menu item, click to clear **Allow Update** if you do not want your employees to change information on a page.

   Note: *Employees can still add and delete information on these pages, where applicable, unless you prevent it in step 3.*

8. Click **Save**.

9. Repeat steps 5 – 8 for each access point.

10. Click **Save User**.

11. In the picklist, select **Manager**.

12. Repeat step 3 – 10 for managers.

Note: *The Select data restrictions for this user and Set reporting permissions for this user options are not available for employee and manager security setup. For more information on the ADP freedom User Security page, see Setting up users and user security of the Implementation guide.*

Chapter 3 – Setting up notification and authorisation

This chapter includes information and instructions for setting up automatic notification and authorisation of employee changes in ADP freedom Solutions Self Service.

Table 3 - 1 – Setting up notification and authorisation to use Self Service

Task	Page	Required?
1 – Determine who reviews and approves employee changes	3 - 1	Yes
2 – Create lists of reviewers and approvers	3 - 4	Yes
3 – Set up rules, profiles, domains and lists	3 - 13	Yes
4 – Set up notifications	3 - 17	Yes
5 – Set up authorisations	3 - 18	Yes
6 – Define when employee changes are purged	3 - 19	Yes

Task 1 - Determine who reviews and approves employee changes

Who performs the task: Implementation team

Associated worksheets: Site Map Worksheet (completed)

Notification Worksheet

Authorisation Worksheet

When employees make changes to their information in Self Service, these changes are saved in ADP freedom. If you want someone to review or approve these employee changes before they are saved in ADP freedom, you need to set up either notification or authorisation. If you prevent employees from changing any information in Self Service, you do not need to set up notification or authorisation. For more information on preventing employees from changing information see **Task 2 – Set up employee and manager security** on page 2 - 3.

What is notification?

Notification allows you to automatically send an email and a message to an employee's Self Service **Welcome** page when another employee adds, changes, or deletes information on a particular page or field.

Note: *If the employee receiving the message is also an ADP freedom user, the employee can also see the message on the ADP freedom home page.*

Example of notification

You can have an email sent automatically to an HR manager every time an employee changes information on the Self Service **Communication** page.

Important: Notification does not prevent the change from being made in ADP freedom. It sends the reviewer(s) an email message and then relies entirely on that reviewer to follow up if there is a problem with the change.

What is authorisation?

Authorisation allows you to automatically require someone to authorise changes employees make on a page in Self Service before the changes are saved in ADP freedom. Because authorisation prevents changes to ADP freedom information unless the change is authorised, it helps maintain the accuracy of the information.

Example of authorisation

You can require the payroll administrator to approve any employee address change before it is saved in Self Service, because an address change can affect the employee's payslip.

Setting up an authorisation process

You can set up a successive authorisation process, where a first-level reviewer or group of reviewers, must approve a change before it is sent to a second-level reviewer for final authorisation. For example, you can designate an employee's manager as a first level reviewer for an address change, a payroll manager as a second-level reviewer.

You can also define which level of manager you want to approve the change. For example, you can have the second level manager approve the change without requiring the first level manager's approval.

Online help

Help is provided in the **Activity List** in Self Service for the employees and managers in your company who might need assistance in authorising an employee change.

Who can review and approve employee changes?

Any person(s) who is set up as an employee in ADP freedom can review or approve changes that other employees make in Self Service. The person authorising the change or being notified of the change does not need to be in management. For example, you can notify an employee that a manager has made a change to the membership information, and you can require the employee to authorise the change.

Which employee changes can be reviewed and approved?

The **Site Map Worksheet** lists the pages and fields in Self Service on which an employee can change information. For these changeable pages and fields, you can do any of the following:

1. Set up notification to send a message to someone if an employee adds or deletes information.

2. Set up notification to send a message to someone if an employee changes the current information in a specific field.

3. Set up authorisation to require someone to approve the change whenever an employee adds, changes, or deletes information.

Complete the Notification Worksheet

Review the completed **Site Map Worksheet** for both employees and managers. If you want to notify someone if an employee adds, changes, or deletes information on any of these pages, complete the following procedure.

Note: *If you decide to prevent employees and managers from adding or deleting information in Self Service, you do not need to set up notification for adds or deletes. For more information on preventing employees from adding and deleting information, see Task 2 – Set up employee and manager security on page 2 - 3.*

Before you begin: Print the **Notification Worksheet** located in **Appendix B.**

1. In the **Page** column on the **Notification Worksheet**, write the name of the page for which you want to set up notification.

2. In the **Type of change** column on the **Notification Worksheet**, circle **Add**, **Change**, and/or **Delete** to indicate the type of change(s) about which you want to notify someone.

3. If you want to notify someone when a change is made to one or more specific fields on the page, write those fields in the **Fields** column.

4. In the **Who to notify (Position or Group)** column, write a brief description of the person you want to notify when an employee adds, changes, or deletes information or a specific field. For example, if a manager adds a skill on the Self Service **Skills** page, and you want to notify the employee, write **Employee** in the **Who to notify** column in the **Add** row. **Tip:** Use generic descriptions of positions or groups instead of names. For example, use CEO rather than George Smith. This strategy reduces maintenance as employees change positions within your organisation.

5. Repeat steps 1 – 4 for each page for which you want to set up notification.

Complete the Authorisation Worksheet

Review the completed **Site Map Worksheet** for both employees and managers. If you want someone to authorise a change if an employee adds, changes or deletes information on any of these pages or in any of these fields, complete this procedure.

Note*: If you decide to prevent employees from adding or deleting information in Self Service, you do not need to set up authorisation for adds or deletes. For more information on preventing employees and managers from adding and deleting information, see* **Task 2 – Set up employee and manager security** *on page 2 - 3.*

Before you begin: Print the **Authorisation worksheet** in **Appendix C**.

1. On the **Authorisation Worksheet**, in the **Page** column, write the name of a page that contains the information for which you want someone to authorise changes.

2. Circle **Add**, **Change**, or **Delete** to indicate which employee changes require authorisation.

3. In the **Who to notify when authorisation complete** column to the right of each type of change you want to authorise, write a brief description of the person(s) you want to notify when a final decision on the change is made.

4. In the **Who should authorise** column in the **Level 1** row, write a brief description of the person(s) you want to authorise the change first.

5. In the **How many authorisers required to** column, write how many of the first level authorisers must approve or reject the change for it to be approved or rejected. You can use either a number or a percentage.

6. In the **Who to notify when level is complete** column, write the name of the person(s) you want to notify when a decision has been made by the first level authorisers.

7. If you want a second person or group of people to authorise the change if the first group approves the change, repeat steps 5 – 7 in the **Level 2** row. For example, if you want an HR manager to approve a new dependent only if an HR generalist has already approved the change, complete the **Level 2** row.

8. Repeat steps 1 – 7 for each page you select to set up for authorisation.

Task 2 – Create lists of reviewers and approvers

Who performs the task: Implementation team

Associated worksheets: Notification Worksheet (completed)

Authorisation Worksheet (completed)

Lists Worksheet

Rules Worksheet

What are lists?

Before you are able to set up notification and authorisation in ADP freedom, you need to set up lists containing the people you want to either notify about changes or authorise changes. You have just identified these lists on the **Notification** and **Authorisation Worksheets** in **Task 1 – Determine who reviews and approves employee changes** on page 3 - 1.

What are list types?

Important: To make sure that the correct people are reviewing and approving employee changes, you must create your lists using the appropriate list types. Each list type is described in detail on the following pages. You should read all of this information carefully before you create your lists. Instructions for completing the **Lists Worksheet** are included in **Complete the Lists Worksheet** on page 3 - 11.

In ADP freedom, you can create lists using any combination of the following list types:

Table 3 - 2 – List types

List type	Definition
Function	A pre-defined group of Self Service users including employees (data owners) and managers (first and second level).
Security Role Profiles	A pre-defined group of ADP freedom users (for example, HR Admin or Pay Admin).
Person	Any person in ADP freedom.
List	Any list you have already created.
HR Profiles	A group of people selected by a rule or rules. In general, you set these up by job title. See **What is the HR Profile list type?** on page 3 - 7 for more information.
HR Domains	A profile that is responsible for another profile to create a hierarchy. The highest level profile, called the domain, can be notified about changes, or authorise changes, for the lower level profile.

What is the Function list type?

The **Function** list type allows you to add people to a list based on their relationship to the information changed or their relationship to each other. You can create a list using any of the following functions:

- **DATAOWNER** – The employee whose information has been changed.

- **DOLEVEL1MANAGER** – The manager of the employee whose information has been changed.

- **DOLEVEL2MANAGER** – The manager of the manager of the employee whose information has been changed.

- **LEVEL1MANAGER** – The manager of the person who made the change. If the manager makes a change to an employee's information, this is the manager's manager.

- **LEVEL2MANAGER** – The manager of the manager of the person who made the change.

- **ORIGINATOR** – The person who made the change.

Example of creating lists using the Function list type

You want first level managers to approve changes for employees on the Self Service **Addresses** or **Communication** pages. You also want to notify these employees that their change has been approved or rejected. You need to create two lists: (1) first level managers and (2) employees whose information has been changed.

- Create a list called **First Level Managers** by using the **Function** list type and by selecting the **DOLEVEL1MANAGER** option.

- Create a list called **Employees** by using the **Function** list type and by selecting the **DATAOWNER** option.

When you set up authorisation, you will:

- Select the **First Level Managers** list as the group of people whom you want to authorise changes on the Self Service **Addresses** or **Communication** pages.

- Select the **Employees** list as the group of people you want to notify when the change is approved or rejected.

What is the Security Role Profile list type?

The **Security Role Profile** list type allows you to create a list containing ADP freedom users with any of the following ADP freedom roles:

- **SUPER USER**

- **SYSTEM ADMIN**

- **PAY/HR ADMIN**

- **PAY ADMIN**
- **HR ADMIN**
- **PDE CLERK**
- **SS ADMIN**

Note: *For more detailed descriptions of the ADP freedom roles, see the **User setup and security** in the [Implementation guide](#).*

What is the Person list type?

The **Person** list type allows you to create a list by selecting people in ADP freedom.

Note: *This list type is available in case you cannot select the person you want to review or approve a change using any other list type. To avoid maintenance as people change positions, use this list type rarely, if at all.*

What is the List list type?

The **List** list type allows you to create a list using one or more lists you have already created. You can use this list type to combine multiple lists into a single list or add the employees in one list to another list. For example, you may have a security profile list for Pay Admins, but you also want to include the PDE clerk.

What is the HR Profile list type?

The **HR Profile** list type allows you to create a list by using one or more rules to select a group of people (called an HR profile). For example, if you want to create a profile of London HR Managers, first you would create a rule to select these employees (for example, all employees with a job title equal to HR Manager AND a location equal to London). After you create the rule, you can create the London HR Managers profile by using this rule to define the profile.

You can use more than one rule to define a profile. However, when you select more than one rule, an employee is included in the profile if he meets the criteria defined in either rule.

What is a rule?

A rule is a set of criteria used to define a generic group of people. For example, if you need to create a rule to select London HR Managers, it might look like this example.

(	Field	Operator	Value	)	Boolean
(	**Job title**	Contains	HR Manager		AND
	Location name	Is	London	)	NONE

Guidelines for creating rules

As you can see from the example above, each clause (line) in a rule contains the following information:

Table 3 - 3 – Rule information

Column name	Description
Field	A field from ADP freedom.
Operator	A comparison operator used to compare the information in the **Field** with the information in the **Value** column.
Value	The information that is compared to the information in ADP freedom field.
Boolean	A logical operator (AND, OR) or NONE, which is always entered at the end of the last line of the rule.

You can use parentheses to group lines together and prioritise the order in which lines of the rule are read. When a rule is processed, information inside the parentheses is always considered before information outside the parentheses.

Important: If your rule has more than one line, you must include an open parenthesis at the beginning of the first line and a close parenthesis at the end of the last line.

You can use any of the following ADP freedom fields to define a rule:

- **Adjusted Service Date**
- **Appointment Location Code**
- **Business Unit Location Code**
- **Employment Hire Date**
- **First name**
- **Full or Part time Employee**
- **Job Title**
- **Last name**
- **Person ID**
- **Position Location Code**
- **Status Code**

Important: If the information in the ADP freedom fields is incorrect, the rule will not work. For example, if you want a rule to select all HR Managers, but

one of your HR Managers does not have the correct job title in the **Job title** field, that manager will not be selected by the rule.

You can use any of the following operators and the reverse of each of these operators (for example, is equal to/is not equal to, contains/does not contain, etc.):

- **is equal to**
- **is less than**
- **is greater than**
- **is less than or equal to**
- **is greater than or equal to**

- **starts with**
- **contains**
- **ends with**
- **is empty**

Finally, you can combine multiple lines in a rule using the following Boolean operators:

Table 3 - 4 – Boolean operators

If you want	Use
Employees who meet the criteria for both lines	**AND**
Employees who meet the criteria for either line	**OR**
End the rule	None

What are exceptions?

After you create a profile by selecting a group of people using a rule, you can add or remove specific people from the profile. The people you add or remove from the profile are called exceptions.

Note: *To avoid on-going maintenance of rules, limit the number of exceptions.*

Example using lists made with the HR Profile list type

You want your payroll managers to authorise changes made by any employee on the Self Service **Address** page. You do not want Nancy Johnson, a payroll manager, to authorise these changes.

- Set up a rule to select your payroll managers (Job title = payroll manager).
- Set up a profile to select your payroll managers using your payroll managers rule.
- Set up an exception to the payroll managers profile, which excludes Nancy Johnson.
- Set up a payroll managers list using your payroll managers profile.

- When you set up authorisation, you will select the payroll managers list as the group of people you want to authorise changes on the Self Service **Address** page. For more information see **Task 5 - Set up authorisations** on page 3 - 18.

What is an HR Domain list type?

The **HR Domain** list type (Domain) allows you to create a list that contains a profile that is responsible for another profile. The highest level profile, called the domain, can be notified about changes, or authorise changes, for the lower level profile.

Example using lists made with the Domain list type

Your company has two locations: Manchester and Birmingham. You want to require your HR managers in Manchester to authorise changes made on the Self Service **Dependents/Contacts** page by employees in Manchester and HR managers in Birmingham to authorise changes made on this same page by employees in Birmingham. You need to do the following:

- Set up a rule to select employees in Birmingham.

- Set up a rule to select HR managers in Birmingham.

- Set up a rule to select employees in Manchester.

- Set up a rule to select HR managers in Manchester.

- Set up a Birmingham HR managers profile using the Birmingham HR managers rule.

- Set up a Birmingham employees profile using the Birmingham employees rule.

- Set up a Birmingham HR managers domain by selecting the Birmingham HR managers profile and assigning the Birmingham employees profile to the Birmingham HR managers domain.

- Set up a Manchester HR managers profile using the Manchester HR managers rule.

- Set up a Manchester employees profile using the Manchester employees rule.

- Set up a Manchester HR managers domain by selecting the Manchester HR managers profile and assigning the Manchester employees profile to the Manchester HR managers domain.

- Create an HR managers list that contains the Birmingham HR managers domain and the Manchester HR managers domain.

- Select the HR managers list as the group of people you want to authorise changes made on the Self Service **Dependents/Contacts** page.

Including all employees in a domain

If you set up authorisation or notification using a domain list type, some employee changes may be rejected automatically unless you:

- Include every employee in a profile and assign the profiles to domains.

- Include the domains for every employee in a list and use a list to define who authorises the change.

Difference between HR Profile lists and Domain lists

If you create a list using a profile and set up an authorisation using that list, the employees in the profile group authorise the change for any employee in the company who makes a change on that page. However, if you create a list using a domain and set up an authorisation using that list, the employees in the domain authorise the change only for the employees in the profiles assigned to the domain.

Example of using HR Profile lists

Use the **HR Profile** list type if you want changes made by any employee in the company to be approved by the people in the profile list. For example, your company has two locations: Birmingham and Manchester. You want Birmingham HR managers to approve changes made by employees in both the Birmingham and Manchester locations. Create a list using the Birmingham HR managers profile and use that list to specify who will authorise the change.

Example of using Domain lists

Use the **HR Domain** list type if you want changes made by specific groups of employees (rather than all employees) to be approved by another specific group of employees. For example, your company has two locations. You want your Birmingham HR managers to approve changes made by your Birmingham employees and your Manchester HR managers to approve changes made by your Manchester employees. Create a domain list that contains the Birmingham HR managers and the Manchester HR managers domains and use that list to specify who will authorise the change.

Complete the Lists Worksheet

Before you begin: Find your completed **Notification** and **Authorisation Worksheets** and print the **Lists Worksheet** in **Appendix D** and the **Rules Worksheet** in **Appendix E.**

Note: *You can use the Sample completed Lists Worksheet on page 3 - 12 as a model for completing your own Lists Worksheet.*

1. On the **Lists Worksheet** in the **List name** column, write down each group that you want to notify of a change and each group that you

want to approve a change. You identified these groups when you completed **Notification** and **Authorisation Worksheets**.

2. In the **List type(s)** column, write down the list type(s) you need to use to create the list in ADP freedom. For more information, see **What are list types?** on page 3 - 5.

3. In the **Description (identify)** column, write down the name of the function, security profile, profile, domain, or list you want to create.

4. If you do not need profiles or domains, you are ready to set up your lists. Go to **How to set up lists** on page 3 - 17.

5. For each profile and domain you listed in the **List type** and **Description** columns, do the following:

6. If the **List type** is a domain, write the profiles you need to set up the domain in the **Profiles used to create the domain(s)** column.

7. For each profile (from either the **List type** or **Profiles used to create the domain(s)** column), write down the **Rules used to create the profile**, and anyone you want to include or exclude from the profile in the **Exceptions** column.

8. On the **Rules Worksheet**, write out the rules you need to create your profiles. Use as many lines as you need for each rule. Combine the lines with Boolean operators. If you have more than one line in a rule, include an open parenthesis at the beginning of the rule and a closed parenthesis at the end of the rule.

Sample completed Lists Worksheet

This sample completed **Lists Worksheet** is filled out as it would be if you were going to set up all the lists discussed in the three examples from this chapter: (1) **Example of creating lists using the Function list type** on page 3 - 6, (2) **Example of using lists made with the HR Profile list type** on page 3 - 9, and (3) **Example using lists made with the Domain list type** on page 3 - 10.

Lists Worksheet

List name	List type(s)	Description (identity)	If applicable:		
			Profiles used to create the domain(s)	Rules used to create the profile	Exceptions to the profile
First Lvl Mgrs	Function	DOLEVEL1MGR			
Employees	Function	DATAOWNER			
Payroll Mgrs	Profile	Payroll Mgrs		Payroll Mgrs	N. Johnson
HR Mgrs	Domain	BM HR Mgrs	BM HR Mgrs	BM HR Mgrs	
			BM Employees	BM Employees	
	Domain	MR HR Mgrs	MR HR Mgrs	MR HR Mgrs	
			MR Employees	MR Employees	

Figure 3 - 1 – Lists Worksheet

Task 3 – Set up rules, profiles, domains, and lists

Who performs the task: Self Service administrator

Where to start the task: ADP freedom

Associated worksheets: **Lists Worksheet** (completed)

Rules Worksheet (completed)

After you plan the lists, you can set up rules, profiles, domains, and lists in ADP freedom. You must set up rules first, followed by profiles and exceptions to profiles, then domains, and finally lists.

How to set up a rule

Before you begin: You must complete **Task 1 – Determine who reviews and approves employee changes** (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). You need your completed **Rules Worksheet** to complete this task.

1. In the menu list, select **System > Self Service > List Management > Rules**.

2. At the top of the picklist, click **New Rules**.

3. In the **Rule name** field, enter the name of the rule.

4. Click **Save Rule.**

5. In the **Rule Clauses** area, click **New Clause**.

6. Complete the fields for the first row of the rule.

7.   Click **Save Clause**.

8.   If necessary, repeat steps 5 – 7 until you add all the rows for the rule.

9.   Select **Save Rule**.

Field Descriptions – Rules page

Table 3 - 1 – Rules page field descriptions

Field	Description
Rule name	Enter a name for a rule in the **Rule name** field. The name used for a rule cannot exceed 50 characters.
Rule Clauses	**Rule clauses**, also known simply as rules, extract specific information from a complete database like a filter. In ADP freedom a rule clause is defined using the **Open parenthesis**, **Field**, **Negator**, **Operator Code**, **Value is a function**, **Value (function)**, **Value (literal)**, **Close parenthesis** and **Link operator** fields and checkboxes. A rule can contain more than one rule clause. A **Link Operator**, AND or OR, is used to connect rule clauses.
Open parenthesis	Parentheses group data parameters in a rule similarly to parentheses in a mathematical equation. By grouping parameters, parentheses determine the order that data is processed by the rule. If an **Open parenthesis** is used, a **Close parenthesis** is also required at the end of the rule or rule clause.
	Multiple open parentheses, for example ((or (((, are used when a rule is complex and contains several rule clauses nested within the rule.
Field	A rule queries fields from a database to establish whether they meet a specific criteria. In ADP freedom, a user selects the field of the database to be queried from the options provided in the **Field** dropdown list.
Negator	If this checkbox is selected, NOT will be included in the rule or rule clause criteria. For example if the **Operator Code** is **less than** and the **Negator** checkbox has been selected, it will become **NOT less than**.

Field	Description
Operator Code	The **Operator Code** is used with a selection from the **Field** dropdown list to query databases in order to extract specific values. For example if the **Field** option **First name** is selected, and **starts with** is selected as the **Operator Code**, and "S" is entered in the **Value (literal)** field, the rule, when executed, will return all first names on the database beginning with "S".
Value is a function	A function is a predefined formula which calculates by using specific values from the database. If a function is to be included in the rule clause, the **Value is a function** checkbox must be selected and, additionally, a selection must be made from the **Value (function)** dropdown list. If the **Value is a function** checkbox has been selected, the **Value (literal)** field must not be completed.
Value (function)	A function is a predefined formula which calculates by using specific values from the database. If a function is to be included in the rule clause, the **Value is a function** checkbox must be selected and, additionally, a selection must be made from the **Value (function)** dropdown list. If the **Value is a function** checkbox has been selected, the **Value (literal)** field must not be completed.
Value (literal)	**Value (literal)** is the field where specific criteria for the rule is entered. For example if the **Field** option **First name** is selected, and **starts with** is selected as the **Operator Code**, and "S" is entered in the **Value (literal)** field, the rule, when executed, will return all first names on the database beginning with "S".
	If the **Value is a function** checkbox has been selected, a selection must be made from the **Value (function)** dropdown list and the **Value (literal)** field should not be completed. Only if the **Value is a function** checkbox has not been selected, should the **Value (literal)** checkbox be completed.
Close parenthesis	A parenthesis groups data parameters in a rule similarly to parentheses in a mathematical equation. If a **Close parenthesis** is used, an

Field	Description
	Open parenthesis is also required at the beginning of the rule or rule clause. Multiple close parentheses, for example)) or))), are used when a rule is complex and contains several rule clauses nested within the rule.
Link operator	A **Link operator** is a word, for example AND or OR, used to join rule clauses to form a rule.

How to set up a profile

Before you begin: You must complete **Task 1 – Determine who reviews and approves employee changes** (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). You need your completed **List Definition Worksheet** to complete this task.

1. In the menu list, select **System > Self Service > List Management > Profiles**.
2. At the top of the picklist, click **New Profiles**.
3. In the **Profile Name** field, enter the name of the profile.
4. In the **Description** field, enter a description of the group.
5. Click **Save Profile**.
6. In the **Profile Rules** area, click **New Rule**.
7. In the **Rule name** field, select the first rule you want to use to select this group.
8. Click **Save Rule**.
9. If necessary, repeat steps 6 – 8 until you have added all the rules required to select people for this profile.
   Note: *Rules are combined with a logical OR. Therefore, all employees who meet the criteria for at least one rule in the profile are included in the profile unless you exclude them using* **Exceptions**.
10. Select **Save Rule**.

How to set up an exception to a profile

Before you begin: You must complete **Task 1 – Determine who reviews and approves employee changes** (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). You need your completed **List Definition Worksheet** to complete this task.

To exclude or include specific individuals from a profile, do the following:

1. In the menu list, select **System > Self Service > List Management > Exceptions**.

2. In the picklist, select the profile for which you want to define an exception.

3. At the bottom of the page, click **New Exception**.

4. Click **Select Person** to open the **Person Selection Assistant**. For more information on selecting a person using the **Person Selection Assistant**, click **Help** in the **Person Selection Assistant** window.

5. After you select a person to include or exclude from the profile, select one of the following options in the **Exception** field:

    • Select **Include** to add the person to the selected profile.

    • Select **Exclude** to remove the person from the selected profile.

6. Repeat steps 3 – 5 to add or remove more people from the profile.

7. Click **Save Exception**.

How to set up lists

Before you begin: You must complete **Task 1 – Determine who reviews and approves employee changes** (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). You need your completed **List Definition Worksheet** to complete this task.

1. From the menu list, select **System > Self Service > List Management > List Definition**.

2. At the top of the picklist, click **New List Definition**.

3. In the **List name** field, enter the name of the list.

4. Click **Save List**.

5. In the **List items** area, click **New Item**.

6. In the **Type** field, select the first group type you want to add to this list.

7. In the **Identity** field, select the specific group you want to add to this list.

8. Click **Save Item**.

9. Repeat steps 5 – 8 to add more groups to this list.
    Note: *Employees selected by any list type you add to the list are included.*

Task 4 – Set up notifications

Who performs the task: Self Service administrator

Where to start the task: ADP freedom

Associated worksheets: Notification Worksheet (completed)

Lists Worksheet (completed)

Before you begin: Find your completed **Notification Worksheet** and **Lists Worksheet**. You must complete **Task 1 – Determine who reviews and approves employee changes** (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). and **Task 3 – Set up rules, profiles, domains, and lists** (see page 3 - 13).

1.   In the menu list, select **System > Self Service > Review/Approve > Define Notification**.

2.   In the picklist, select the page for which you want to set up notification.

3.   At the bottom of the page, click **New Definition**.

4.   In the **On create notify** field, select the list of people you want to be notified if an employee adds a new record on the selected page.

5.   In the **On update notify** field, select the list of people you want to notify if an employee changes any field on the selected page.

6.   In the **On delete notify** field, select the list of people you want to be notified if an employee deletes a record on the selected page.

7.   If you do not want to notify someone when an employee changes a field, click **Save Definition** to complete this procedure.

8.   To notify someone when an employee changes a particular field, select enable **Field Level Notification**.

9.   Click **Save Definition**.

10.   In the **Field Level Notification** area, click **New Field**.

11.   In the **Field name** field, select the field for which you want to monitor changes.

12.   In the **On update notify** field, select the list of people you want to notify when an employee changes the information in this field and click **Save Field**.

13.   Repeat steps 9 – 12 for each field on the page for which you want to set up a specific notification.

Task 5 – Set up authorisations

Who performs the task: Self Service administrator

Where to start the task: ADP freedom

Associated worksheets: Authorisation Worksheet (completed)

Lists Worksheet (completed)

Before you begin: Find your completed **Authorisation Worksheet** and **Lists Worksheet**. You much complete **Task 1 – Determine who reviews and**

approves employee changes (see page 3 - 1) and **Task 2 – Create lists of reviewers and approvers** (see page 3 - 4). and **Task 3 – Set up rules, profiles, domains, and lists** (see page 3 - 13).

1. From the menu list, select **System > Self Service > Review/Approve > Define Authorisation**.

2. In the picklist, select the page for which you want to set up authorisation.

3. At the bottom of the page, click **New Definition.**

4. In the **Applies to** area, select the changes you want someone to authorise.

5. In the **Notify when authorisation complete** field, select the list of people that you want to receive an email when the change has been approved or rejected.

6. Click **Save Definition**.

7. In the **Authorisation levels** area, click **New Level**.

8. In the **Votes for** field, enter the number or percent of people in the first level of authorisers who must approve the change to have it passed on to the second level, and then select **Number** or **%** in the **Type** field.

9. In the **Votes against** field, enter the number or percent of people in the first level of authorisers who must reject the change to have it rejected, and select **Number** or **%** in the **Type** field.

10. In the **To be authorised by** field, select the list of people that you want to authorise or reject the changes first.

11. In the **Notify when selected level complete** field, select the list of people that you want to notify when the first level of authorisers have made their decisions.

12. Click **Save Level**.

13. Repeat steps 7 – 12 for each level you want to set up.

Task 6 – Define when employee changes are purged

Who performs the task: Implementation team and Self Service administrator

Where to start the task: ADP freedom

Whenever an employee makes a change that requires authorisation, a record of the requested change is saved in ADP freedom and forwarded to the authoriser(s). Until the authoriser(s) make(s) a decision to approve or reject the change, the status of the change remains unauthorised. If, however, the authorisers wait too long to make a decision, the change is automatically rejected when the purge delay date is reached.

Important: The actual information is not changed in ADP freedom until the change is approved.

As part of setting up authorisation and notification, you need to define how many days you want **Authorised**, **Rejected**, and **Unauthorised** to be available for review.

How to define when employee changes are purged

You need to define the default **Purge Delay** for each status. These default selections apply to all changeable pages unless you override the selection for a specific page.

1. In the menu list, select **System > Self Service > Review/Approve > Purge Definition**.

2. In the **Page Name** grid, select **Default**.

3. In the **Purge Delay (Days)** area, enter the number of days you want each type of change to remain in the database.

4. Click **Save Page**.

How to override the default purge delay for a specific page

If you want changes made on a specific page to wait a different number of days than the default purge delay, do the following:

1. In the menu list, select **System > Self Service > Review/Approve > Purge Definition**.

2. From the picklist, select the page for which you want to override the default purge delay.

3. Click **New Page** at the bottom of the page.

4. In the **Purge Delay (Days)** area, enter the number of days you want each type of change for this page to remain in the database.

5. Click **Save Page**.

6. Repeat steps 2 – 5 for each page for which you want a different purge delay than the default.

Chapter 4 – Rolling out Self Service to your employees

This chapter includes information and instructions for rolling out ADP freedom Solutions Self Service to your employees.

Table 4 - 1 – Information and instructions for rolling out Self Service

Task	Page	Required?
1 – Develop a plan to introduce Self Service to employees and managers	4 - 1	Yes
2 – Develop a method for getting feedback	4 - 3	Optional
3 – Conduct the initial employee rollout	4 - 4	Yes
4 – Conduct the full employee rollout	4 - 5	Yes

Task 1 – Develop a plan to introduce Self Service to employees and managers

Who performs the task: Implementation team

Your goal in rolling out Self Service to your employees should be to generate as much interest and excitement about this new employee service as possible.

Use a two phase approach

ADP recommends a multi-phase approach to introduce Self Service to employees:

- Initial employee rollout phase: Introduce Self Service to a small group of employees first. Then, evaluate and implement their feedback. Use this time not only to test your customisations of Self Service, but also to test your rollout approach.

- Rollout phase: After you introduce Self Service to a small group of employees, you can begin a more general release to larger groups of employees.

Separate employees into rollout groups

One of the first steps in developing your rollout plan is to determine how to separate your employees into rollout groups. ADP recommends your initial employee rollout group be a small cross-section of your organisation, perhaps 25 – 50 employees. Depending on the size of your organisation, you may want to rollout Self Service to the rest of your organisation all at once, or you may want to continue the phase approach.

In determining how to group your employees, you should consider employee locations, department size, shifts and skill levels. You should also consider the group workload. For the initial employee rollout group, this factor is particularly important because the success of your general rollout will depend, in part, on this group's ability to provide feedback. For general rollout, workload is important to consider because you don't want to waste time generating enthusiasm and training employees who won't have time to explore Self Service.

Decide how to distribute log on information

Determine if you will distribute the registration pass code and instructions for login on to Self Service at the kick-off meeting, by mail, or by email. Employees will need this information to log on to Self Service the first time.

Plan a kick-off meeting

The kick-off meeting is your opportunity to introduce your employees to Self Service and to generate their interest in using it. After you complete your initial employee rollout and you are ready to begin rolling out Self Service to the rest of your organisation, you can advertise the kick-off meeting and Self Service by using posters, email messages, letters, or voice mail messages.

Presentation

Following are some ideas for enhancing this meeting:

- Hold a contest to generate excitement about Self Service.

- Provide refreshments at the kick-off meeting.

- Decorate the meeting facility.

- Ask the CEO or VP of Human Resources to make the presentation.

Handouts

The following is a list of items and information you should consider handing out during your kick-off meeting:

- A small gift for attending the presentation (for example, pens or mugs with the URL of Self Service to provide future advertising).

- Instructions for accessing Self Service including information about the authentication process to set their expectations and a note to have employees check their browser settings to ensure that the latest page updates are displayed.

- Feedback mechanism (see **Task 2 - Develop a method for getting feedback** on page 4 - 3).

- Reminder that employees should log off Self Service when finished.

- Expectations and objectives for Self Service.

- Schedule of training sessions (optional, depending on the meeting group).

- Employee support information (for example, who to contact for help and how to contact them).

- Future plans for Self Service.

Choose incentives for logging on and providing feedback

Consider offering your employees a small incentive for registering to use Self Service or for completing a feedback survey about Self Service. Here are some ideas:

- Place the names of all employees who register by a certain date in a drawing for a day off.

- Give any employee who returns their survey by a certain date a small gift (a pen, a key ring).

- Send your employees on a Self Service treasure hunt. Place the names of all employees with the correct answers in a drawing for a gift certificate to a local restaurant.

You know the incentives that work for your employees. Use your creativity to get them excited about Self Service! For more information on gathering feedback, refer to **Task 2 - Develop a method for getting feedback** on page 4 - 3.

Determine your rollout schedule

After you determine how you will present Self Service to your employees, define a schedule for moving forward. You should schedule an initial employee rollout period during which you conduct a kick-off meeting and allow this small test group to use Self Service. Your schedule should include time for collecting and implementing initial employee feedback before you begin rolling out Self Service to the rest of your employees.

Task 2 – Develop a method for getting feedback

Who performs the task: Implementation team

ADP recommends that the implementation team develop a method for gathering feedback from your employees to ensure Self Service is meeting the corporate objectives you have established. Here are some suggestions:

- Survey: Develop a survey of questions you want your employees to answer about Self Service. Then, distribute it to them at the kick-off meeting and/or, if it is an online survey, include a link to the survey from the **Welcome** page in Self Service. Give them an incentive for returning the survey by a particular date. For some incentive ideas, see **Choose incentives for logging on and providing feedback** on page 4 - 3.

- Focus group: Include the date, time, and place for the focus group meeting in the kick-off meeting handout and post a reminder in the **Company information** area on the Self Service **Welcome** page.

Note: *For more information about customising the **Welcome** page in Self Service, see [Customise the Welcome page](#) on page 2 - 1.*

Questions to ask

Asking the following questions can provide useful feedback to your implementation team.

- Is information easy to find?

- Were you able to move through Self Service easily?

- Would you like to see additional pages? If so, what information should these additional pages contain?

Plan for change

After you have gathered feedback about Self Service, the implementation team must decide how to address the feedback concerns and communicate back to employees the results of the feedback. Consider the following items as you determine how to implement changes to Self Service:

- As Self Service evolves over time, do you want to implement each change as it comes up? Or, do you want to save your changes and implement them on a quarterly basis?

- When modifications are made to Self Service, do you want to provide a feedback mechanism relating to the new changes?

Task 3 – Conduct the initial employee rollout

Who performs the task: Self Service administrator

Where to start the task: ADP freedom

Any of the people entered in ADP freedom who were ever employed by your organisation have access to Self Service by default. However, you can prevent employees with a particular employment status from accessing Self Service. In addition, your employees cannot access Self Service until you give them the registration pass code and instructions for logging on.

Distribute log on instructions to the initial employee rollout group

Distribute the registration letter, which includes the registration pass code and the Self Service URL, to the initial employee rollout group.

Tip: To prevent other employees from logging on to Self Service during the test period, ask your initial employee rollout group to keep the registration pass code to themselves and change the registration pass code after two weeks. For more information see **Set up a registration pass code** on page 1 - 9.

Gather and incorporate feedback

After your initial employee rollout group has used Self Service, gather feedback from them using the method you determined in **Develop a method for getting feedback** on page 4 - 3. Incorporate as many of these ideas and suggestions as you can to meet your employees' expectations.

Task 4 – Conduct the full employee rollout

Who performs the task: Implementation team and Self Service administrator

After you have successfully rolled out Self Service to your initial employee rollout group and incorporated their feedback, roll out Self Service to the rest of your employees based on the rollout schedule you developed in **Determine your rollout schedule** on page 4 - 3.

Chapter 5 – Maintaining Self Service

This chapter includes information and instructions for maintaining employee security, monitoring employee changes awaiting authorisation and troubleshooting problems your employees may encounter.

Table 5 - 1 – Maintaining Self Service

Task	Page	Required?
1 – Maintain employee security	5 - 1	Yes
2 – Monitor employee changes awaiting authorisation	5 - 2	Optional
3 – Troubleshooting	5 - 3	Yes

Task 1 – Maintain employee security

How to prevent an employee from logging on to Self Service

You can prevent eligible employees from accessing Self Service only after they have registered. Employees are eligible to log on to Self Service if their employment status does not match any status you prevented from accessing Self Service.

1.   In the menu list, select **System > Self Service > User Maintenance**.

2.   In the picklist, select the employee you want to prevent from accessing Self Service.

3.   On the **User Maintenance** page, click to clear **Allow Access to Self Service**.

4.   Click **Update User**.

Note: *You can also require an employee to re-register to use Self Service if you suspect someone has gained access using another person's information. For more information, see **How to unregister an employee** on page 5 - 2.*

How to reset an employee password

1.   In the menu list, select **System > Self Service > User Maintenance**.

2.   In the picklist, select the employee whose password you need to reset.

3.   On the **User Maintenance** page, click **Reset Password**. The new password is automatically sent to the email address on the employee's **About Me > User Setup > Account Information** page.

   Note: *The **Reset Password** button is active only when **Allow Access to Self Service** is selected.*

4. In the **Reset Password** window, click **Close**.

How to unregister an employee

When you unregister an employee, you force that employee to go through the registration process again to access Self Service.

Note: *You can also prevent a user from accessing Self Service after registering. For more information, see **How to prevent an employee from logging on to Self Service** on page 5 - 1.*

1. In the menu list, select **System > Self Service > User Maintenance**.

2. In the picklist, select the employee you want to unregister.

3. Click **Unregister User** to remove a user's access to Self Service.

4. In the **Unregister User** window, click **Update User**.

Task 2 – Monitor employee changes awaiting authorisation

How to view the status of employee changes

1. In the menu list, select **System > Self Service > Review/Approve > Authorisation Override**.

2. In the picklist, enter criteria to search for the employee changes you want to view.

3. Select **Click here to view selection** to display a list of the selected employee changes in the grid at the top of the **Authorisation Override** page.

4. To view details about a specific employee change, select the change in the grid.

5. To view additional information about the status of this employee change, click **View Comments**.

How to re-route employee changes awaiting authorisation

1. In the menu list, select **System > Self Service > Review/Approve > Authorisation Override**.

2. In the picklist, enter criteria to search for the employee changes you want to re-route.

3. Click **Click here to view selection** to display a list of the selected employee changes in the grid at the top of the **Authorisation Override** page.

4. In the grid, select the employee change you want to re-route.

5. In the **Current Voting** area, click **Re-assign Element**.

6. Select the person to whom you want to assign this employee change.

Task 3 – Troubleshooting

Message during logon or registration – No Access to Self Service

Check the following:

- Does the employee's employee status match an employee status that has access to Self Service? For more information and instructions, see **How to prevent an employee from logging onto Self Service** on page 5 - 1 and **Employee status field for all employees** on page 1 - 7.

Employee is failing validation during registration

Confirm that the information the employee is typing on the **Validation** page matches exactly the information in ADP freedom for that employee.

Table 5 - 2 – Validation information fields in ADP freedom

ADP freedom field	Format	Example
National Insurance Number (NI)	XX999999X*	AB122334C
Date of Birth	dd/mm/yyyy	31/12/1961
Home post code (post code from **Correspondence Address** in ADP freedom)	XX99 9XX* or XX9 9XX*	AB12 3CD or EF4 5GH

* X = Alpha, 9 = Numeric, @ = Alphanumeric

Appendix A - Site Map Worksheet

For instructions on completing this worksheet, see **Complete the Site Map Worksheet for employees and managers** on page 2 - 5.

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
About Me	Personal	Personal Details		. Yes . No	No
			Last name		
			First name		
			Middle name(s)		
			Preferred name		
			Previous name		
			Title		
			Suffix		
			Date of birth		
			Place of birth		
			Martial status		
		Additional Details		. Yes . No	No
			Ethnic origin		
			Religion/community		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			EU citizen (checkbox)		
			Primary		
			Acquired		
			Secondary		
			Acquired		
			Blood donor (checkbox)		
			Disabled (checkbox)		
			Comments		
		Addresses		◦ Yes ◦ No	No
			Address (line 1)		
			Address (line 2)		
About Me	Personal	Addresses	Address (line 3)	◦ Yes ◦ No	No
			Town/City		
			County		
			Postcode		
			Country		
			Print on my payslip (checkbox)		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Correspondence address (checkbox)		
			Additional information		
		Communication		. Yes . No	No
			Type		
			Telephone		
			Primary contact (checkbox)		
			Email		
		Contacts and Dependents		. Yes . No	No
			Relationship		
			Is this person an employee (checkbox)		
			Emergency contact type		
			Use correspondence address(checkbox)		
			Last name		
			First name		
			Middle name(s)		
			Preferred name		
			Title		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Address		
			Town/City		
			County		
			Postcode		
			Country		
			Comments		
About Me	Personal	Contacts and Dependents	Home phone	. Yes . No	No
			Work phone		
			Mobile		
			Email		
			Dependent (checkbox)		
			Disabled (checkbox)		
			In full time education (checkbox)		
			Gender		
			Date of birth		
		Private Vehicles		. Yes . No	Yes

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Vehicle registration no.		
			Make		
			Model		
			Engine size (cc)		
			Fuel type		
			Type		
			Colour		
			Date from		
			Date to		
			Agree to use for business (checkbox)		
			Date agreed		
			Additional information		
	Job	Previous Employer	Not Changeable	Not Updateable	No
		Company Property	Not Changeable	Not Updateable	No
		Company Vehicles	Not Changeable	Not Updateable	No
		Disciplinary Action	Not Changeable	Not Updateable	No
		Employment Status	Not Changeable	Not Updateable	No

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
		Job Details	Not Changeable	Not Updateable	No
		Appointment	Not Changeable	Not Updateable	No
About Me	Job	Exit Information	Not Changeable	Not Updateable	No
	Profile	Skills	Not Changeable	Not Updateable	No
		Qualifications		ˌ Yes ˌ No	Yes
			Subject		
			Qualification level		
			Qualification grade		
			Qualification date		
			School/College		
			Comment		
		Languages	Not Changeable	Not Updateable	No
		Educational Establishments	Not Changeable	Not Updateable	No
	Absence	My Absence		ˌ Yes ˌ No	Yes
			First day absent		
			Absent from		

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Last day absent		
			Absent to		
			Time off work		
			Category of absence		
			Reason for absence		
			Accident at work (checkbox)		
			Notifiable disease		
			Employee's note		
		Agree Absences	Not Changeable	Not Updateable	No
		Who is Absent?	Not Changeable	Not Updateable	No
		Company Holiday Dates	Not Changeable	Not Updateable	No
	Login Information	Account Information	Not Changeable	Not Updateable	No
		Change Password		. Yes . No	No
			Please enter current password		
			Please enter new password		
About Me	Login Information	Change Password	Confirm new password	. Yes . No	No

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
My Money	Payroll Information	Payslip View	Not Changeable	Not Updateable	No
		Earnings	Not Changeable	Not Updateable	No
		Deductions	Not Changeable	Not Updateable	No
		Pay Rate History	Not Changeable	Not Updateable	No
		Tax	Not Changeable	Not Updateable	No
		National Insurance	Not Changeable	Not Updateable	No
		Tax Credit	Not Changeable	Not Updateable	No
		Student Loan	Not Changeable	Not Updateable	No
		Attachment of Earnings	Not Changeable	Not Updateable	No
		Company/Inland Revenue	Not Changeable	Not Updateable	No
Authorise	Changes	Authorise changes	Not Changeable	Not Updateable	No
		Pending/Approved	Not Changeable	Not Updateable	No
Company	Business Unit	Business Unit Details	Not Changeable	Not Updateable	No
	Job	Job Details	Not Changeable	Not Updateable	No

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
		Job Grades	Not Changeable	Not Updateable	No
My Team	Personal	Personal Details	Not Changeable	Not Updateable	No
		Emergency Contacts	Not Changeable	Not Updateable	No
		Communication	Not Changeable	Not Updateable	No
		Private Vehicles		ˌ Yes ˌ No	Yes
			Vehicle registration no.		
			Make		
			Fuel Type		
			Model		
			Type		
My Team	Personal	Private Vehicles	Engine size (cc)	ˌ Yes ˌ No	Yes
			Colour		
			Date from		
			Date to		
			Agreed to use for business (checkbox)		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Date agreed		
			Additional information		
	Job	Previous Employer		˙ Yes ˙ No	No
			Previous employer		
			Start date with employer		
			End date		
			Leaving reason		
			Resignation period		
			Period type		
			Comments		
			Previous job		
			Start date of previous job		
			Final salary		
			Reference requested		
			Reference received		
			Reference summary		
			Last name		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			First name		
			Title		
			Job title		
			Telephone number		
			Email		
			Address		
My Team	Job	Previous Employer	Town/City	ˌ Yes ˌ No	No
			County		
			Postcode		
			Country		
		Company Property		ˌ Yes ˌ No	Yes
			Property name		
			Date issued		
			Date returned		
			Pass number		
			Security level		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Expiry date		
			Comments		
		Company Vehicles	Not Changeable	Not Updateable	No
		Disciplinary Action		ˌ Yes ˌ No	Yes
			Reason		
			Date		
			Details		
			Employee (checkbox)		
			Employee		
			Protected		
			Level		
			Date		
			Given by		
			Employee (checkbox)		
			Expiry period		
			Expiry date		
			Comments		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Employee response		
		Employment Status	Not Changeable	Not Updateable	No
		Job Details	Not Changeable	Not Updateable	No
My Team	Job	Appointment	Not Changeable	Not Updateable	No
		Labour Allocation	Not Changeable	Not Updateable	No
		Exit Information		. Yes . No	Yes
			Date completed		
			Completed by		
			New employer		
			Rehire		
			Comments		
	Profile	Skills		. Yes . No	No
			Date attained		
			Effective to		
			Last used		
			No years used		
			Comments		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
My Team		Language		ˌYes ˌNo	Yes
			Language		
			Attribute		
			Level		
			Date attained		
			Effective to		
			Last used		
			No years used		
			Comments		
		Qualifications		ˌYes ˌNo	Yes
			Subject		
			Qualification level		
			Qualification grade		
			Qualification date		
			School/College		
			Comment		
	Profile	Educational Establishment	Not Changeable	Not Updateable	No

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
	Absence	My Team's Absence		ˌ Yes ˌ No	Yes
			First day absent		
			Absent from		
			Expected last day absent		
			Last day absent		
			Absent to		
			Time off work		
			Category of absence		
			Reason for absence		
			Accident at work (checkbox)		
			Notifiable disease (checkbox)		
			Employer's note		
		Certificate of Absence		ˌ Yes ˌ No	Yes
			Date issued to employee		
			Type of certificate		
			Issued from		
			Signed by		

Appendix A – Site Map Worksheet

Access point	Menu item	Page	Changeable fields	Allow updates?	New/Delete available?
			Acting as		
			With effect from (EWC)		
			With effect to		
			Date received by employer		
			Valid (checkbox)		
			Detail/Diagnosis		
		Summary	Not Changeable	Not Updateable	No
		Who is Absent?	Not Changeable	Not Updateable	No
	Earnings	Earnings	Not Changeable	Not Updateable	No
		Pay Rates	Not Changeable	Not Updateable	No
	Payrun Earnings	Summary	Not Changeable	Not Updateable	No
	Authorise	Pending/Approved	Not Changeable	Not Updateable	No

Appendix B - Notification Worksheet

For instructions on completing this worksheet, see **Complete the Notification Worksheet** on page 3 - 3.

Page	Type of change	Who to notify (Position or Group)
	Add	
	Change	
	Delete	
	Fields	
Page	**Type of change**	**Who to notify (Position or Group)**
	Add	
	Change	
	Delete	
	Fields	

Appendix B – Notification Worksheet

Page	Type of change	Who to notify (Position or Group)
	Add	
	Change	
	Delete	
	Fields	

Page	Type of change	Who to notify (Position or Group)
	Add	
	Change	
	Delete	
	Fields	

Appendix C - Authorisation Worksheet

For instructions on completing this worksheet, see **Complete the Authorisation Worksheet** on page 3 - 4.

| Page | Type of change | Who to notify when authorisation complete | Level | Who should authorise | How many authorisers required to | | Who to notify when level is complete |
					Approve (# or %)	Reject (# or %)	
	Add		1				
			2				
	Change		1				
			2				
	Delete		1				
			2				

Appendix C – Authorisation Worksheet

Page	Type of change	Who to notify when authorisation complete	Level	Who should authorise	How many authorisers required to		Who to notify when level is complete
					Approve (# or %)	Reject (# or %)	
	Add		1				
			2				
	Change		1				
			2				
	Delete		1				
			2				
	Add		1				
			2				
	Change		1				
			2				
	Delete		1				
			2				

Appendix D - Lists Worksheet

For instructions on completing this worksheet, see **Complete the Lists Worksheet** on page 3 - 11.

List name	List type(s)	Description (identity)	If applicable:		
			Profiles used to create the domain(s)	**Rules used to create the profile**	**Exceptions to the profile**

Appendix D – Lists Worksheet

List name	List type(s)	Description (identity)	If applicable:		
			Profiles used to create the domain(s)	Rules used to create the profile	Exceptions to the profile

Appendix D – Lists Worksheet

Appendix E – Rules Worksheet

For instructions on completing this worksheet, see **Complete the Lists Worksheet** on page 3 - 11.

Rule name	Row	(	Field	Operator	Negate operator?	Value	)	Boolean
	1							
	2							
	3							
	4							
	1							
	2							
	3							
	4							
	1							
	2							
	3							
	4							

Appendix E – Rules Worksheet

Rule name	Row	(	Field	Operator	Negate operator?	Value	)	Boolean
	1							
	2							
	3							
	4							
	1							
	2							
	3							
	4							
	1							
	2							
	3							
	4							