Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Human Resources Management Self Service Suite Administrator's Guide

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Contents

Introduction

Welcome to Human Resources Management (HRM) Self Service Suite.

The HRM Self Service Suite is a collection of applications that are accessible from within Business Portal for Microsoft Dynamics® GP. Using these applications, employees can update their personal information, enter timecards, submit vacation requests, and complete other related tasks. Managers can approve timecards, modify their employees' pay rates, and complete other administrative tasks.

Check for updated instructions

This information was current as of March 13, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction is divided into the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*
- *Technical support*
- *Documentation feedback*

What's in this manual

This manual will help you install and set up the applications in the HRM Self Service Suite.

This documentation is divided into the following parts:

- Part 1, **Getting started**, provides an overview of the applications included in the HRM Self Service Suite, and explains how to install them.

- Part 2, **General setup**, explains the setup tasks you must complete, such as assigning users to roles and setting up the Employee Profile application (which is always installed with the HRM Self Service Suite).

- Part 3, **Time and Attendance setup**, provides step-by-step instructions for setting up the Time and Attendance application, which employees can use to submit timecards and vacation requests.

- Part 4, **Workflow setup**, describes how to modify the document approval process.

- Part 5, **Groups and roles reference**, provides details about the SharePoint groups and MBF roles that are used with the HRM Self Service Suite.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office might be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
Enter a default address ID	Italic type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal installation media.

Business Portal Installation Guide The Business Portal Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Business Portal Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The Business Portal User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a

Business Portal page, a Microsoft® Windows® SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 or Microsoft SharePoint Server 2010 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to SharePoint Server features also will be available.

Technical support

You can contact Microsoft Dynamics technical support online or by telephone. Go to www.microsoft.com/dynamics and click the CustomerSource link or call 888-477-7877 (in the U.S. and Canada) or 701-281-0555.

Documentation feedback

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Part 1: Getting started

This part of the documentation provides an overview of the HRM Self Service Suite, and explains how to install it.

The following information is included:

- Chapter 1, "Overview," provides an overview of each application included in the HRM Self Service Suite and explains key concepts you'll need to understand to administer these applications.
- Chapter 2, "Back office integration," explains how the HRM Self Service Suite interacts with the Microsoft Dynamics GP Payroll and Human Resources modules.
- Chapter 3, "Installation," provides instructions on installing and upgrading the HRM Self Service Suite.

Chapter 1: Overview

The following information provides an overview of each application included in the HRM Self Service Suite, and explains some key concepts you'll need to understand to administer these applications.

This information is divided into the following sections:

- *Applications*
- *Users, groups, and roles*
- *Workflow*
- *Business Portal site structure*

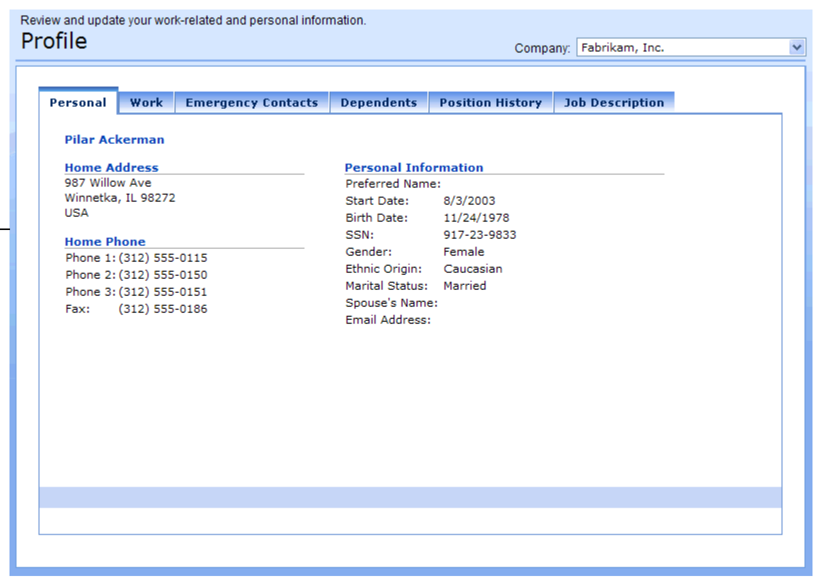
Applications

There are five applications in the HRM Self Service Suite. The following information describes each application.

Employee Profile Using the Employee Profile application, employees can manage their personal information, such as their address and emergency contacts information. Managers can use Employee Profile to review their employees' performance and position history.

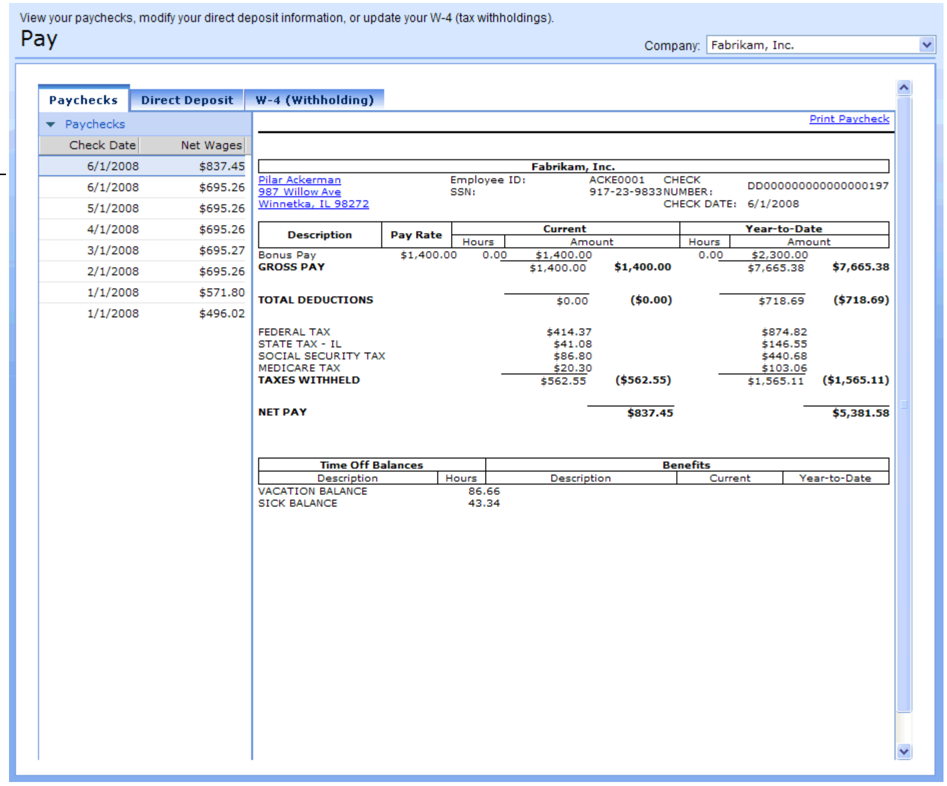
Employee Profile must be installed to use any other application in the HRM Self Service Suite.

Employee Profile helps employees modify their personal information, such as their address.



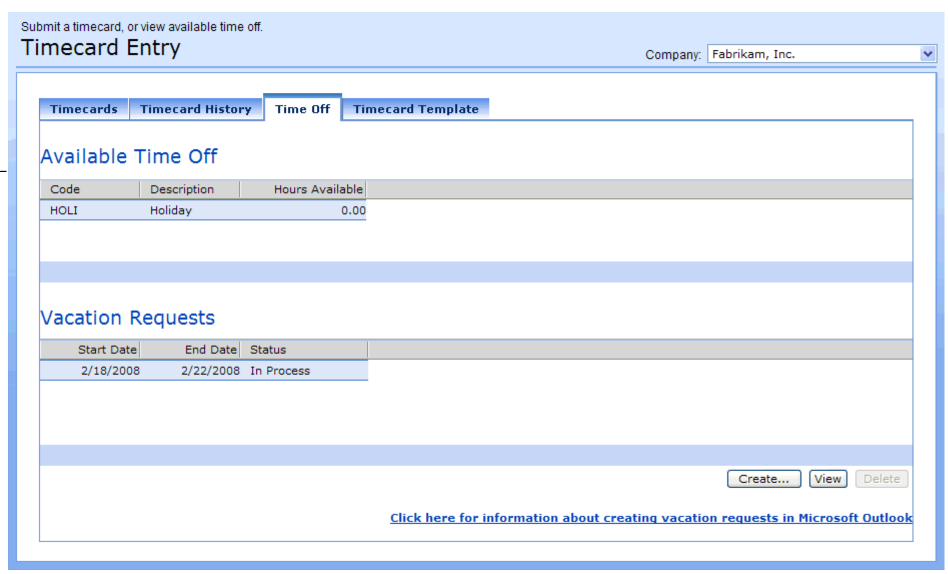
Employee Pay The Employee Pay application enables employees to view their pay and benefits information. Managers can use Employee Pay to review their employees' compensation history and modify employee pay rates.

Employee Pay enables employees to view their paychecks.



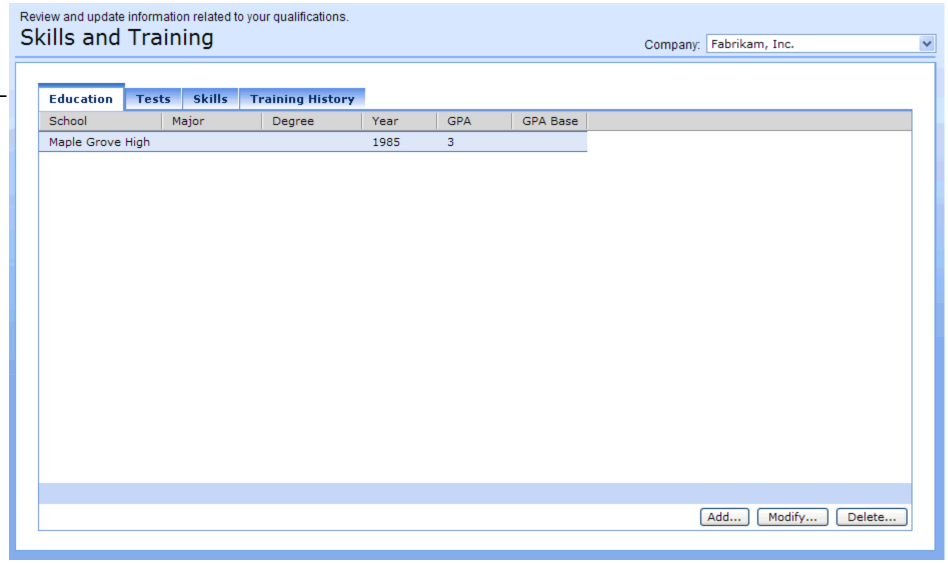
Time and Attendance Using the Time and Attendance application, employees can submit timecards, enter vacation requests, and view the amount of time off they have available.

Employees can enter vacation requests using Time and Attendance.



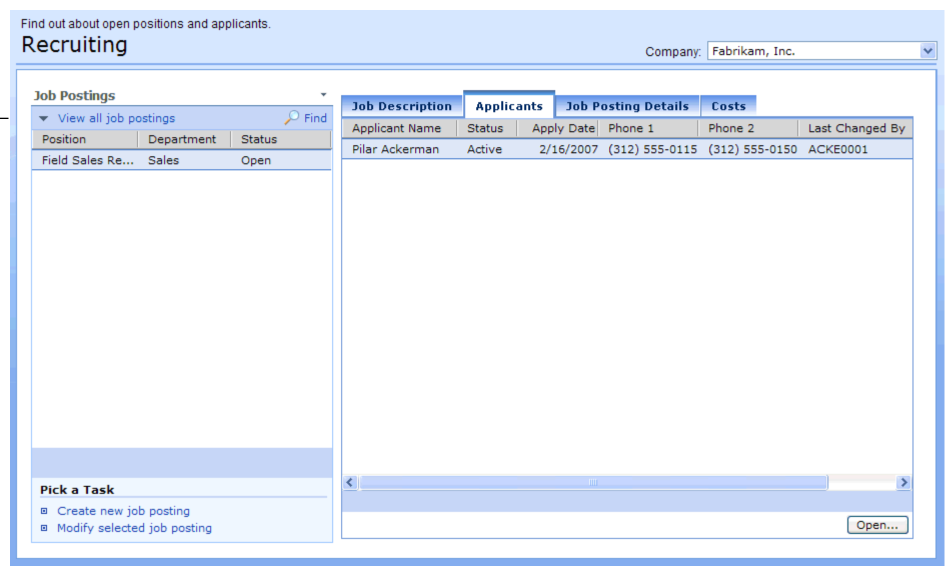
Skills and Training The Skills and Training application enables employees—and their managers—to view the education, skills, and training information that has been entered for them.

Employees can view the education, skills, and training information on record for them using the Skills and Training application.



Recruitment Using the Recruitment application, employees can apply for job openings in the company and view the status of their submitted applications. Managers can use the Recruitment application to post job openings, view applications, and track the cost incurred by the company to fill a position.

Managers can use the Recruitment application to post job openings and view submitted applications.



Users, groups, and roles

To use Business Portal, all users must be assigned to both SharePoint groups and Microsoft Business Framework (MBF) roles. SharePoint groups determine the access users have to the sites, pages, and other elements that display data, while MBF roles determine the access that users have to data.

When setting up the HRM Self Service Suite, you'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. For more information about groups and roles, see Chapter 4, "SharePoint groups and MBF roles."

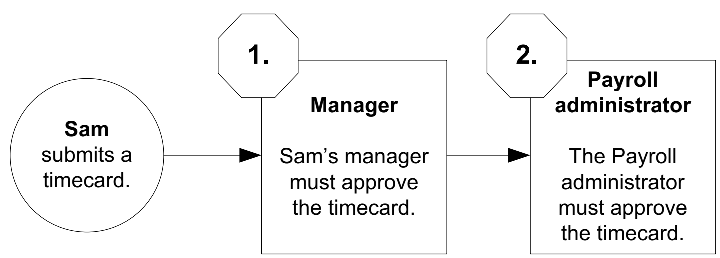
Workflow

When an employee completes an action in the HRM Self Service Suite, a document is created. For example, when an employee creates a timecard or modifies an emergency contact record, a document is created. The path this document must follow in order to be approved is called *workflow*.

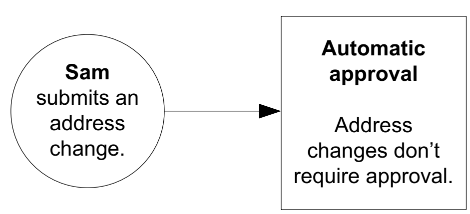
A workflow defines how a document moves through the system—it lists all of the people (or roles) who must approve the document.

Each document type has its own workflow

Each type of HRM document has its own workflow. For example, you may require a timecard to be approved by the employee's manager and the Payroll administrator.



Consider another example. You may want address changes submitted by employees to be automatically approved. In this scenario, the address change is automatically saved to the back office database without approval from a manager or administrator.



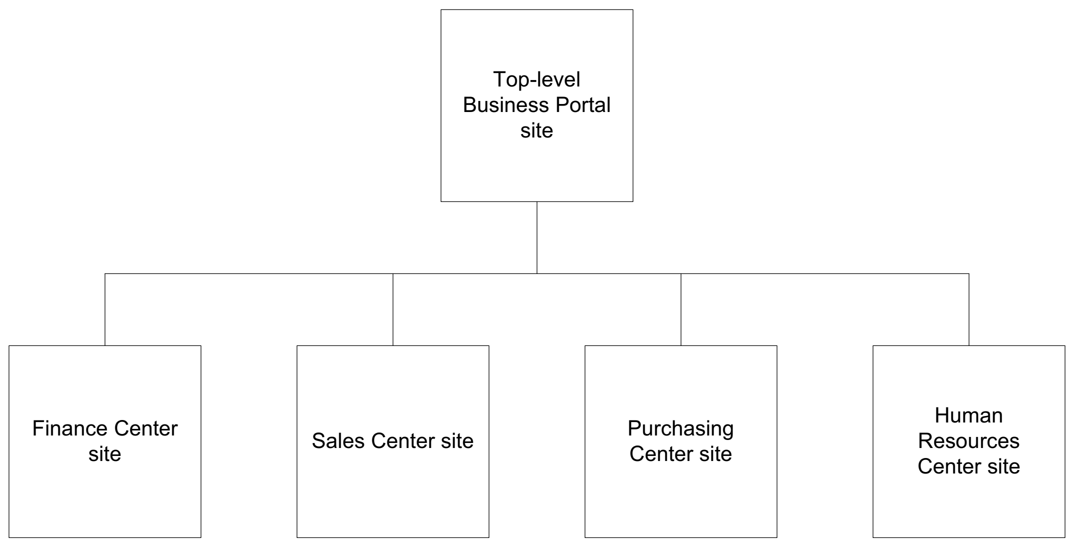
Default workflows

Each type of HRM document is installed with a default workflow. You can modify each document's workflow to fit your business needs. To view the default workflow for each document, and to modify it, see Part 4, **Workflow setup**.

Business Portal site structure

Business Portal is composed of multiple web sites. The top-level site contains the main Home page and the administration pages for Business Portal and its applications. Each Business Portal center is a subsite that contains pages related to a particular department or role.

The following illustration shows the Business Portal site structure. (You may have additional center subsites in your implementation.)



You must use the top-level web site to perform administrative tasks for Business Portal and its applications, including Order Management. However, you can administer SharePoint users, groups, and content on each subsite.

For more information about site administration, refer to the Business Portal Administrator's Guide.

Chapter 2: Back office integration

To use the HRM Self Service Suite, the Human Resources or Payroll module must be installed, registered, and set up in Microsoft Dynamics GP. The modules you are using will determine which HRM Self Service Suite applications you can use, and how some of the features will work.

The following information explains which applications and features you can use, based on the back office modules you're using.

- *Integrating with Human Resources*
- *Integrating with Payroll*
- *Integrating with Human Resources and Payroll*

Integrating with Human Resources

If the Human Resources back office module is installed and registered, but the Payroll module is not, the following features are enabled:

- You can install all HRM Self Service Suite applications.

- Employees can enter hours in Time and Attendance using time codes. Time codes based on the following time types are supported: Hourly, Overtime, Absent, and Benefit.

- Managers can create new job postings.

However, these are the limitations:

- You cannot create, modify, or delete pay schedules in Business Portal. (You must use Microsoft Dynamics GP to do this. For more information, see the documentation for the Human Resources module.)

- Employees cannot view benefit information.

Integrating with Payroll

If the Payroll back office module is installed and registered, but the Human Resources module is not, the following features are enabled:

- You can install the Employee Profile, Employee Pay, and Time and Attendance applications.

- Employees can enter hours in Time and Attendance using pay codes. Pay codes based on the following pay types are supported: Hourly, Overtime, Double Time, Vacation, Sick, and Holiday.

- You can create, modify, or delete pay schedules in Business Portal.

However, these are the limitations:

- You cannot install the Recruitment application.
- You cannot install the Skills and Training application.

Integrating with Human Resources and Payroll

If both the Human Resources and Payroll back office modules are installed and registered, the following features are enabled:

- You can install all HRM Self Service Suite applications.
- Employees can enter hours in Time and Attendance using *pay codes*. For more information, see Chapter 10, "Pay codes and time codes."

Chapter 3: Installation

The following information explains how to install the HRM Self Service Suite.

This information is divided into the following sections:

- *Install the HRM Self Service Suite*
- *Start the Workflow service*

Install the HRM Self Service Suite

If you did not install the HRM Self Service Suite when running the Business Portal installation wizard, use the Setup Wizard to add it to your Business Portal installation. If you've installed Business Portal on multiple web servers, you must add the HRM Self Service Suite to each of the web servers.

Before installing

Before you can install the HRM Self Service Suite, you must

- Enter registration keys for it in Microsoft Dynamics GP. For more information about entering registration keys, refer to your Microsoft Dynamics GP documentation.

- Verify that you are a member of the Administrators group on the Business Portal server.

To install the HRM Self Service Suite

To install the HRM Self Service Suite, you must run the Setup Wizard.

1. From the Business Portal installation media, double-click the **CDSetup.exe** file.

2. Under **Install**, click **Business Portal for Microsoft Dynamics GP**.

For detailed instructions, refer to the Business Portal Installation Guide.

Start the Workflow service

The **Microsoft Business Framework queued work item service** (Workflow service) is installed when you install Business Portal. This service processes HRM documents.

Single Business Portal web server If you have one Business Portal server, the Workflow service will be started automatically when you install Business Portal on that server.

Multiple Business Portal web servers In a multiple Business Portal web server environment, the Workflow service must run on *one* of the servers. The Workflow service will be started automatically on the first server where you installed Business Portal.

If you need to manually start the Workflow service, follow the steps below.

To start the Workflow service, you must be an administrator on the Business Portal web server.

1. Open the Services window.
   Start > **Administrative Tools** > **Services**
2. Double-click **Microsoft Business Framework queued work item service**.
3. The Properties window appears. Click the **General** tab.
4. From the **Startup type** list, select **Automatic**.
5. Click **Start**.
6. Click **OK** to close the window.

PART 2: GENERAL SETUP

Part 2: General setup

This part of the documentation contains the setup tasks you must complete to use the HRM Self Service Suite. Specifically, you'll need to assign users to SharePoint groups and MBF roles and set up the Employee Profile application (which is always installed with the HRM Self Service Suite).

The following information is included:

- Chapter 4, "SharePoint groups and MBF roles," describes the HRM-specific groups and roles you'll need to assign your users to.
- Chapter 5, "Employee Profile application," provides setup tasks specific to the Employee Profile application.

Chapter 4: SharePoint groups and MBF roles

To use Business Portal, all users must be assigned to both SharePoint groups and Microsoft Business Framework (MBF) roles. SharePoint groups determine the access users have to the sites, pages, and other elements that display data, while MBF roles determine the access that users have to data.

There are six main categories of HRM users. The following information explains the SharePoint groups and MBF roles you'll need to assign these users to.

- *Employee*
- *Manager*
- *Human Resources administrator*
- *Payroll administrator*
- *HRM Self Service administrator*
- *Workflow administrator*

Employee

To give your employees access to the HRM Self Service Suite, assign them to the:

- BP Employee group
- Employee advanced role

Employees must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages employees can use

Once you assign your employees to the BP Employee group and Employee advanced role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Employee Center	Profile	View and update their employee profile information, such as their address, emergency contacts, and dependents.	This page is installed with Business Portal. However, Employee Profile must be installed in order for users to modify the information on this page.
	Pay	View their paychecks, set up direct deposit information, and view and modify tax withholding information.	Employee Pay
	Benefits	View their payroll benefit contributions and their employer's contributions.	Employee Pay
	Skills and Training	View and update information about their education and certifications they've received. They can also view their training history.	Skills and Training
	Timecard Entry	Submit timecards, view their available hours of vacation and sick time, and submit vacation requests.	Time and Attendance
	HR Documents - Submitted by Me	View documents they have submitted. Users can suspend or terminate documents they've submitted from this page.	Employee Profile
	HR Documents - Assigned to Me	View the documents that are currently assigned to them, and approve or reject them.	Employee Profile
Company Center	Careers	View job openings in the company and submit applications.	Recruitment
	Training	View a list of course offerings in the company.	Skills and Training
	Organization Structure	View the company's organizational chart.	Employee Profile

Manager

To give managers access to the HRM Self Service Suite, assign them to the:

- BP Manager group
- Manager advanced role

Managers must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages managers can use

Once you assign managers to the BP Manager group and Manager advanced role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Manager Center	Team Profile	View and update personal and work information for a selected employee.	Employee Profile
	Team Job History	View the job history, performance information, and compensation history for a selected employee.	Employee Profile
	Team Skills and Training	View and update the education, skill sets, tests, and training on record for a selected employee.	Skills and Training
	Team Timecard Entry	Submit timecards for their employees and view each employee's time off information.	Time and Attendance
	Timecard Status	See which employees have not submitted timecards for a selected pay period.	Time and Attendance
	Recruiting	Submit job postings, review the job posting details (including the opening date, close date, status, and costs), and view a list of applicants for the job.	Recruitment

Human Resources administrator

To give your Human Resources administrators access to the HRM Self Service Suite, assign them to the:

- BP HR Administrator group
- Human Resources Administrator role

Human Resources administrators must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages Human Resources administrators can use

Once you assign users to the BP HR Administrator group and Human Resources Administrator role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Human Resources Center	Timecard Status	See which employees have not submitted timecards for a selected pay period.	Time and Attendance

Payroll administrator

To give Payroll administrators access to the HRM Self Service Suite, assign them to the:

- BP Payroll Administrator group
- Payroll Administrator role

Payroll administrators must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages Payroll administrators can use

Once you assign users to the BP Payroll Administrator group and Payroll Administrator role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Payroll	Timecard History	View historical timecard information for employees.	Time and Attendance
	Timecard Status	See which employees have not submitted timecards for a selected pay period.	Time and Attendance
Top-level Business Portal site	Timecard Delegates	Give an employee permission to enter timecards on behalf of another employee.	Time and Attendance

HRM Self Service administrator

To give application administrators the ability to manage the HRM Self Service Suite, assign them to the:

- BP HRM Self Service Administrator group
- HRM Self Service Administrator role

HRM Self Service Suite administrators must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages HRM Self Service administrators can use

Once you assign users to the BP HRM Self Service Administrator group and HRM Self Service Administrator role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Top-level Business Portal site	Document Signatures	Indicate whether employee signatures are required on HRM documents, such as timecards.	Employee Profile
	Default Address ID	Specify the address ID that will be used as the default for employees who don't already have a default address ID in Microsoft Dynamics GP.	Employee Profile
	Direct Reports View	Indicate whether managers can view information about their immediate direct reports, or multiple levels of direct reports.	Employee Profile
	Timecard Setup	Set up pay schedules, create timecard restrictions, and create batch prefixes.	Time and Attendance
	Employee Assignments	Give employees permission to modify information in the Department, Position, Pay Code, and Time Code fields on their timecards.	Time and Attendance
	Timecard Delegates	Give an employee permission to enter timecards on behalf of another employee.	Time and Attendance

Workflow administrator

Workflow is a term used to describe the document approval process. A workflow defines how a document moves through the system—that is, it lists all of the people (or roles) who must approve the document.

We recommend that you give your HRM Self Service Suite administrators the ability to manage the workflow system. Assign them to the:

- BP HR Workflow Administrator group
- Workflow Administrator role

Workflow administrators must be assigned to this group and role so that they have access to the pages and data necessary to complete their tasks.

How to assign users to SharePoint groups and MBF roles

You'll need to work with the Business Portal administrator to assign users to SharePoint groups and MBF roles. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Pages Workflow administrators can access

Once you assign users to the BP HR Workflow Administrator group and Workflow Administrator role, they can use the following HRM-specific pages.

Site	Page	What can users do on this page?	Which HRM application is this page installed with?
Top-level Business Portal site	Workflow Business Processes	View and modify document workflows.	Employee Profile
	Workflow Process Options	Manage notifications and event log settings.	Employee Profile
	Workflow Process Log	View, end, suspend, and resume business process instances.	Employee Profile
	Workflow Event Log	View information about workflow events in summary or in detail.	Employee Profile
	Workflow Task Transfer	Assign tasks from one user or role to another.	Employee Profile

Chapter 5: Employee Profile application

To set up the Employee Profile application, you must complete a few procedures, such as entering a default address ID and indicating whether employees must sign documents they submit. This information provides step-by-step instructions for each procedure.

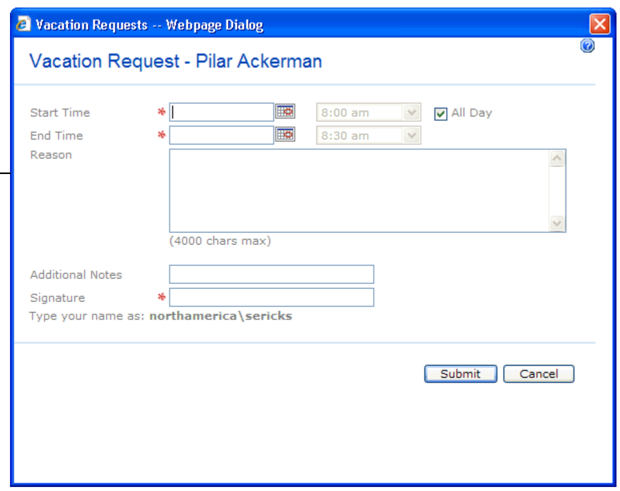
This information is divided into the following sections:

- *Require electronic signatures*
- *The employee address displayed on the Profile page*
- *Enter a default address ID*
- *Specify how direct reports are displayed*

Require electronic signatures

For confirmation purposes, you may want to require employees to electronically sign documents they submit, such as documents containing emergency contact information or direct deposit information. To sign documents, employees must enter their domain and logon ID in the following format: *domain\logon ID*.

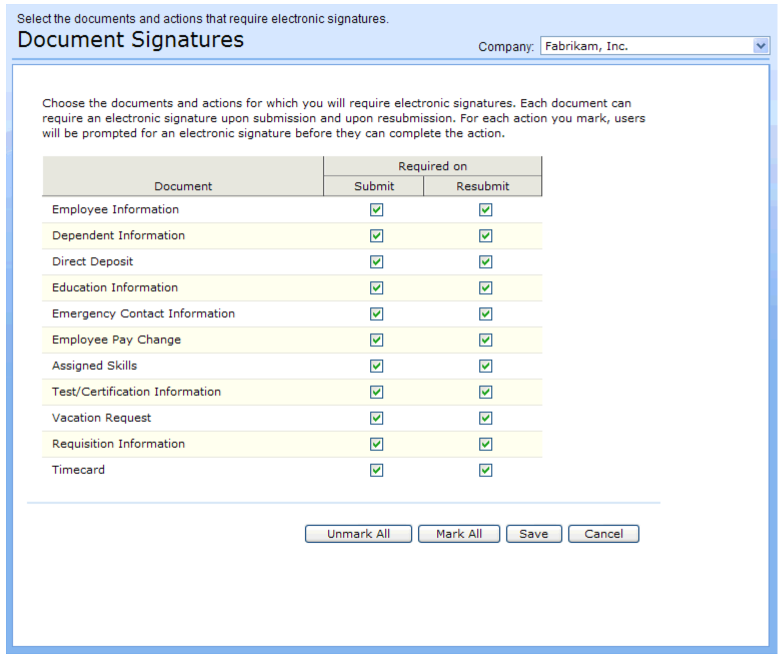
The employee must sign the document here.



Use the following steps to specify which documents employees must sign.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Document Signatures**. The Document Signatures page appears.



3. For each document listed, indicate whether a signature is required when the document is submitted and resubmitted.

The W-4 document will not be listed on this page because a signature is legally required for all W-4 documents.

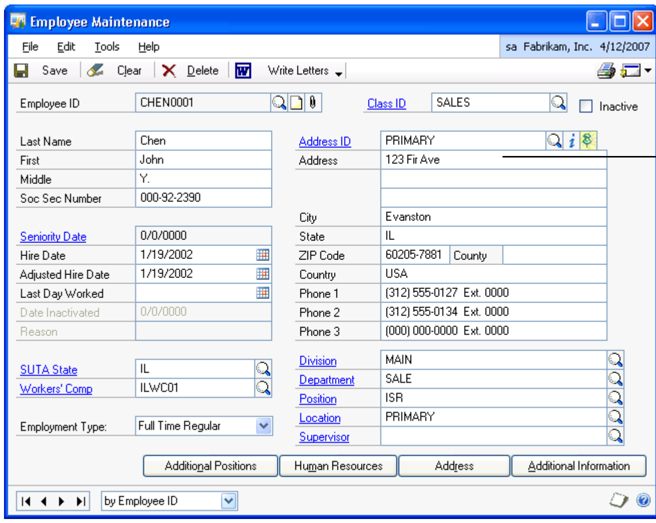
4. Click **Save**.

*To require signatures on timecards and vacation requests, you must also mark the electronic signature option on the **Set Up Timecard Restrictions** page. For more information, refer to* *Chapter 7, “Timecard restrictions.”*

The employee address displayed on the Profile page

An employee may have multiple address records saved in the back office database. For example, suppose intern John Chen's primary address is his address during the school year. His secondary address is his address during the summer months.

When John views the Profile page in Business Portal, he'll be able to view and modify only one of his addresses. The address that is displayed on the Profile page is the address that is first displayed when you open his employee record in the Employee Maintenance window in Microsoft Dynamics GP.



The address displayed when you open the Employee Maintenance window is the address displayed on the Profile page in Business Portal.

If an employee does not have an address specified in the back office, the employee can enter one on the Profile page. For more information about how that address is saved in the back office database, see *Enter a default address ID* on page 29.

Enter a default address ID

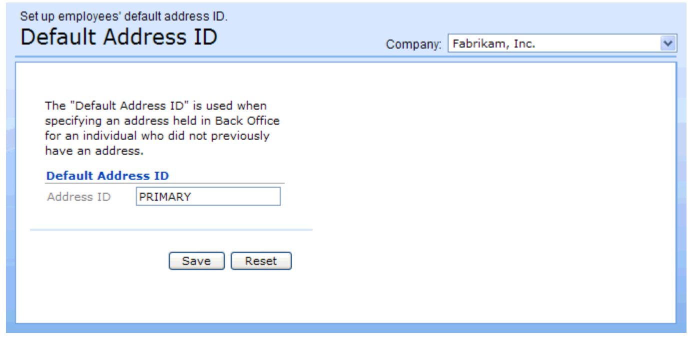
You must specify a default address ID on the Default Address ID page. A default address ID is used to save an employee's address in the back office database. For example, the address ID may be PRIMARY or WORK. To understand how a default address ID is used, consider the following example:

Wendy Kahn's employee record in the back office database doesn't include an address, so she enters her address on the Profile page in Business Portal. When Wendy's address is saved in the back office database, the default address ID you entered on the Default Address ID page is assigned to it. (An address cannot be saved to the back office database without an address ID.)

Use the following steps to enter a default address ID.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Default Address ID**. The Default Address ID page appears.



3. Enter a default address ID.

4. Click **Save**.

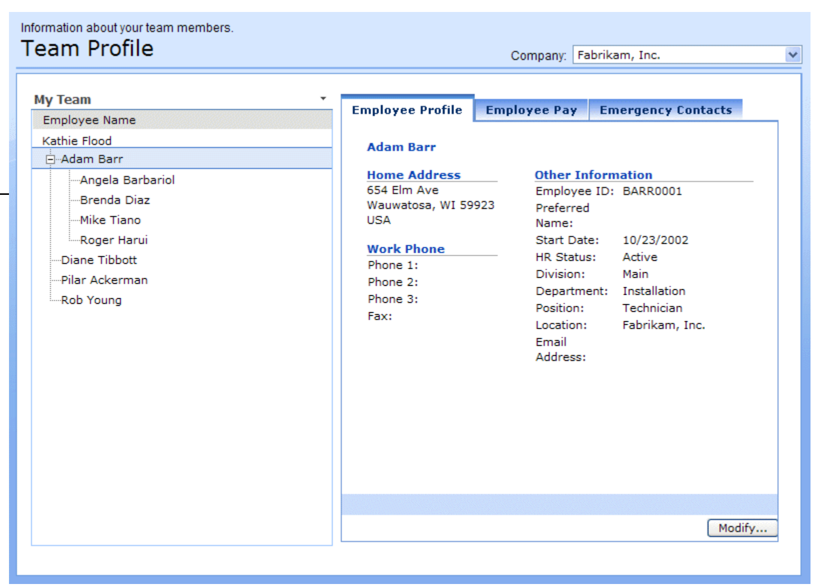
Specify how direct reports are displayed

Several pages on the Manager Center site display the **My Team** web part. As the HRM Self Service administrator, you must specify which employees will be listed in the **My Team** web part. This means you must determine the following:

How many levels of direct reports should be displayed? Specify whether managers will see a single level of direct reports in the **My Team** web part, or all levels. If you choose to display a single level, managers will see their own direct reports. If you choose to display multiple levels, managers will see their direct reports and all organizational levels below their direct reports.

Should inactive employees be displayed? Specify whether inactive employees will be listed in the **My Team** web part. You can choose to display only active employees, or both active and inactive employees.

Specify which employees will be listed in the ***My Team*** *web part.*



Use the following steps to specify which employees will be listed in the **My Team** web part.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Direct Reports View**. The Direct Reports View page appears.

3. Indicate whether you want to display a single level of direct reports or all levels in the **My Team** web part.

   - To display all levels of direct reports, select the **View multiple levels of direct reports** check box.

   - To display a single level (the manager's direct reports only), clear the **View multiple levels of direct reports** check box.

4. Indicate whether inactive employees will be listed in the **My Team** web part.

   - To display only active employees, select the **Include only active employees** check box.

   - To display active and inactive employees, clear the **Include only active employees** check box.

5. Click **Save**.

PART 3: TIME AND ATTENDANCE SETUP

Part 3: Time and Attendance setup

This part of the documentation contains the setup tasks you must complete to use the HRM Self Service Suite's Time and Attendance application.

The following information is included:

- Chapter 6, "Pay schedules," explains how to create a pay schedule for each pay frequency your company uses, and assign your employees to it.
- Chapter 7, "Timecard restrictions," explains how to create and assign timecard restrictions, which are groups of rules controlling timecard entry.
- Chapter 8, "Batch prefixes," describes how to create and assign batch prefixes. Batches are used to group transactions in Microsoft Dynamics GP for posting. Batches are identified by a name or a number.
- Chapter 9, "Assignment priority," explains how to set up the assignment priority. The assignment priority indicates which assignment type—employee, position, department, location, or division—takes precedence when an employee enters a timecard.
- Chapter 10, "Pay codes and time codes," outlines the differences between pay codes and time codes, and explains how to specify which codes your employees can enter time against.
- Chapter 11, "Departments and positions," provides instructions on how to specify which departments and positions your employees can enter time against.
- Chapter 12, "Timecard delegates," describes how to give an employee permission to enter timecards on behalf of another employee.
- Chapter 13, "Vacation requests and Microsoft Office Outlook," explains how to install the required components of the Vacation Requests for Microsoft Office Outlook® integration.

Chapter 6: Pay schedules

A pay schedule is a record of the beginning and ending dates of each pay period, for a specific pay frequency, for a specific year. You must create a pay schedule for each pay frequency your company uses, and assign your employees to it.

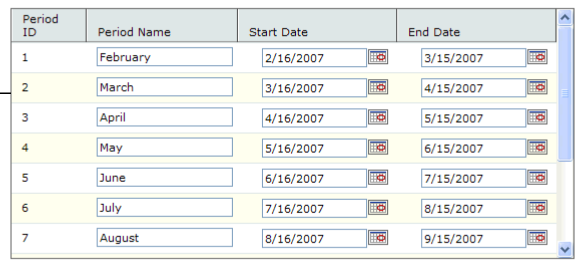
The following sections are included:

- *Pay schedule overview*
- *Create a pay schedule*
- *Modify a pay schedule*
- *Assign a pay schedule*
- *Delete a pay schedule*

Pay schedule overview

A pay schedule is a record of the beginning and ending dates of each pay period, for a specific pay frequency, for a specific year. For example, a monthly pay schedule might look like the following.

Monthly pay schedule



Period ID	Period Name	Start Date	End Date
1	February	2/16/2007	3/15/2007
2	March	3/16/2007	4/15/2007
3	April	4/16/2007	5/15/2007
4	May	5/16/2007	6/15/2007
5	June	6/16/2007	7/15/2007
6	July	7/16/2007	8/15/2007
7	August	8/16/2007	9/15/2007

You must create a pay schedule for each pay frequency your company uses. Where you create pay schedules depends on which Microsoft Dynamics GP modules are registered.

Human Resources

If Human Resources is registered, you won't create pay schedules in Business Portal. Rather, the pay schedules that have been defined in the Human Resources back office module will automatically appear in the **Pay Schedules** web part on the Timecard Setup page. However, you will need to:

- Specify how many past and future pay periods will be available to employees to enter time against. See *Modify a pay schedule* on page 37 for more information.

- Assign the pay schedule to employees. See *Assign a pay schedule* on page 38 for more information.

Payroll

If Payroll is registered, you must set up and assign pay schedules in Business Portal. For more information, see *Create a pay schedule* on page 36 and *Assign a pay schedule* on page 38.

Human Resources and Payroll

If both Human Resources and Payroll are registered, you must set up and assign pay schedules in Business Portal. For more information, see *Create a pay schedule* on page 36 and *Assign a pay schedule* on page 38.

Create a pay schedule

If the Payroll module is registered, you must create pay schedules in Business Portal. Create a pay schedule for each pay frequency your organization uses. For example, create a weekly pay schedule for employees who are paid weekly, and a monthly pay schedule for employees who are paid monthly.

Use the following steps to create a pay schedule.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Pay Schedules** web part, click **Add** to open the Pay Schedule Setup page.

4. In the **Pay Schedule Year** field, select a year.

5. In the **Description** field, enter a description for the pay schedule.

6. In the **Frequency** list, select how often employees assigned to this pay schedule will be paid.

7. If you selected **Weekly** or **Biweekly** as the frequency, you can select the **Use Only Full Pay Periods** check box to create pay periods that are always equal in length (7 days or 14 days). If this check box is selected, the pay schedule will be 364 days long. Day 365 is included in the first pay period for the following year.

   You can clear the **Use Only Full Pay Periods** check box to create pay periods that can be shorter than a standard pay period. If this check box is cleared, the pay schedule will be 365 days long—or 366 days long for leap years. The last pay period for the year will be one or two days long.

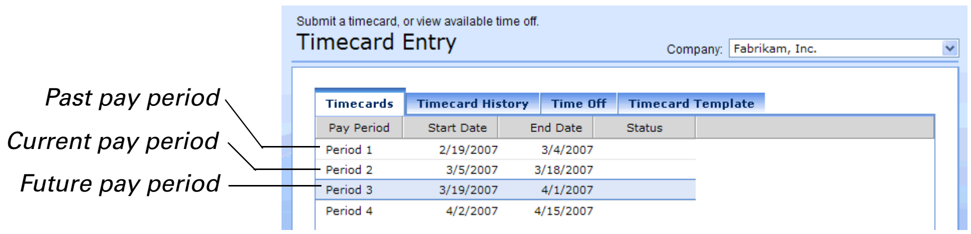
8. In the **Begin Date** field, enter or select the starting date for this pay schedule.

9. Click **Calculate Pay Periods**.

   The system displays names and dates for each pay period, based on the beginning date and pay frequency you selected. You can change the pay period name and dates, as needed.

10. In the **Past pay periods** field, enter the number of pay periods prior to the current period that should appear on the **Timecards** tab of the Timecard Entry page.

    Be sure enough past pay periods are displayed to employees. For example, an employee may need to view past pay periods so that she can enter vacation hours for time already taken. Or an employee may have saved—and not yet submitted—a timecard for a previous pay period. If you choose to no longer display past pay periods, the employee will not be able to submit the saved timecard.



11. In the **Current and Future pay periods** field, enter the number of current and future pay periods that should appear on the **Timecards** tab of the Timecard Entry page.

12. Click **Save**.

Modify a pay schedule

Use the **Pay Schedules** web part on the Timecard Setup page to modify pay schedules. You can modify the following settings for pay schedules:

- Description
- Period names
- Start and end dates
- Number of pay periods displayed on the **Timecards** tab of the Timecard Entry page

If the Payroll module is not registered, you won't be able to modify the description, period names, and start and end dates.

Use the following steps to modify a pay schedule.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Pay Schedules** web part, select a pay schedule and click **Modify**. The Pay Schedule Setup page appears.

4. Modify the pay schedule's description, if necessary.

5. The pay periods for the selected pay schedule are displayed. Modify the pay period names, start dates, and end dates, as needed.

   If there are active timecards using the pay schedule, you won't be able to modify the pay period names, start dates, and end dates.

   If the frequency is **Weekly** or **Biweekly** and the **Use Only Full Pay Periods** check box is selected, the pay periods must be equal in length. If the **Use Only Full Pay Periods** check box is cleared, you can enter pay periods that are shorter than a standard pay period, such as one or two days.

6. In the **Past pay periods** field, enter the number of pay periods prior to the current one that should appear on the **Timecards** tab of the Timecard Entry page.

   Be sure enough past pay periods are displayed to employees. For example, an employee may need to view past pay periods so that she can enter vacation hours for time already taken. Or an employee may have saved—and not yet submitted—a timecard for a previous pay period. If you choose to no longer display past pay periods, the employee will not be able to submit the saved timecard.

7. In the **Current and Future pay periods** field, enter the number of current and future pay periods that should appear on the **Timecards** tab of the Timecard Entry page.

8. Click **Save**.

Assign a pay schedule

After creating pay schedules, assign them to your employees. If an employee is not assigned to a pay schedule, he or she can't enter timecards.

You can assign pay schedules to each employee individually, or to specific groups of employees. For example, you can assign a pay schedule to all employees in a certain location or department.

Use the following steps to assign a pay schedule.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Pay Schedules** web part, select a pay schedule and click **Assign**. The Assign Pay Schedule page appears.

4. From the **Restrict By** list, select a category.

   For example, if you select **Employee**, all employees will be listed, and you can assign the pay schedule to specific employees. If you select **Department**, all departments will be listed. You can then assign the pay schedule to all employees in a specific department.

If the category you selected has a large number of records, it might take a few moments to display all the records.

5. Select the check box for each employee or group you want the pay schedule assigned to.

6. To assign the pay schedule to another category of employees, make another selection from the **Restrict By** list. Then select the check box for each employee or group you want the pay schedule assigned to.

   When you use different categories to assign employees to pay schedules, some employees may be assigned to multiple pay schedules. For example, suppose you assigned *MonthlyPaySchedule* to all employees in the Sales department and *BiweeklyPaySchedule* to all employees who are managers. Now assume that Michael is the manager of the Sales department. This means he is assigned to both *MonthlyPaySchedule* and *BiweeklyPaySchedule*. However, only one pay schedule can be used when entering time cards. The pay schedule an employee will use when entering timecards is determined by the assignment priority. For more information, see Chapter 9, "Assignment priority."

7. To view a list of all employees and groups currently assigned to the pay schedule, click **View**.

8. Click **Save**.

Delete a pay schedule

If the Payroll module is registered, you can delete pay schedules in Business Portal. If the Payroll module isn't registered, you will have to delete your pay schedules in Microsoft Dynamics GP.

Before deleting a pay schedule:

- Verify that no employees are assigned to the pay schedule.
- Be sure there are no active timecards or timecard templates using the pay schedule. If you delete a pay schedule that is being used by a timecard or template, the timecard originator won't be able to work with that timecard or template anymore.

  If you delete a pay schedule that has timecards associated with it, the timecard originators won't be able to view history information for those timecards.

Use the following steps to delete a pay schedule.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Pay Schedules** web part, select a pay schedule and click **Delete**. Confirm that you want to delete the pay schedule.

Chapter 7: Timecard restrictions

A timecard restriction is a group of rules controlling timecards. For example, a timecard restriction specifies whether employees must enter start and stop times on their timecards. A timecard restriction also specifies whether employees must electronically sign their timecards.

You must create timecard restrictions and assign them to employees. The following information explains more about timecard restrictions, including how to create them and assign them to employees.

The following sections are included:

- *Timecard restrictions overview*
- *Create or modify a timecard restriction*
- *Assign a timecard restriction*
- *Delete a timecard restriction*

Timecard restrictions overview

A timecard restriction is a group of rules controlling timecards. You must create timecard restrictions and assign them to employees.

When you create a timecard restriction, you can:

Set hour requirements Indicate the minimum and maximum number of hours that an employee can enter on a timecard.

Indicate whether start and stop times are required Indicate whether employees must enter the time they started and stopped working each day. For example, instead of entering eight hours of work for a specific day, they'll need to enter 8:00 A.M. as the starting time and 5:00 P.M. as the stopping time.

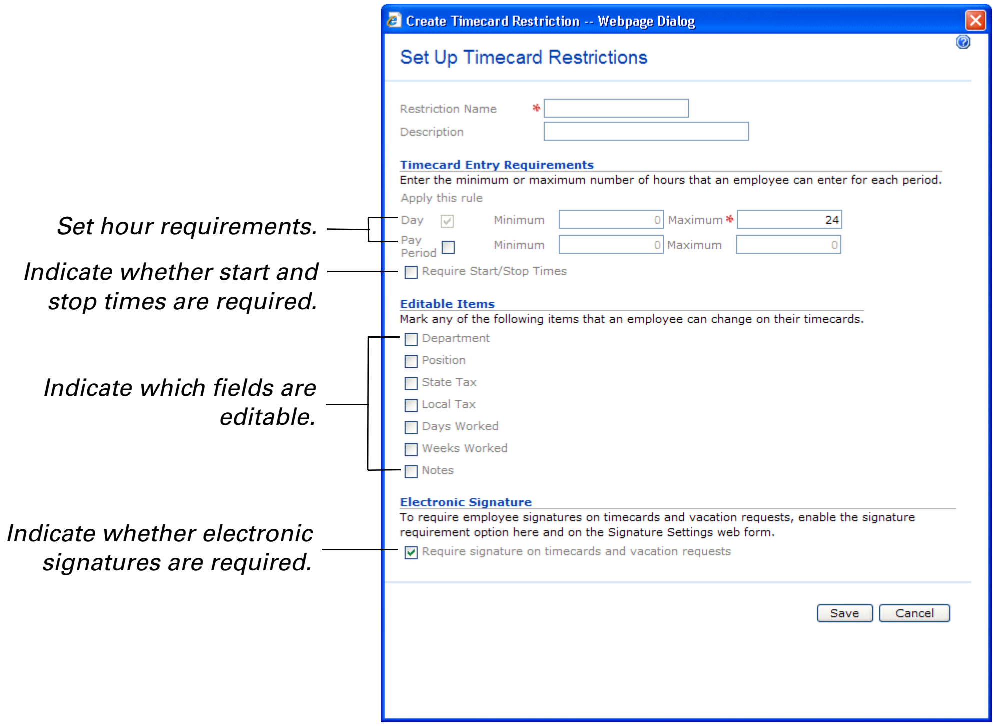
Indicate which fields are editable Indicate whether employees will be able to view and edit specific fields on their timecards.

- If Payroll is registered in the back office, you can select all the fields shown.

- If Payroll is not registered in the back office, you can select only the **Notes** field.

When an employee enters time against a *pay code*, the fields that you select will be available on the employee's timecard. When an employee enters time against a *time code*, only the **Notes** field will be available (that is, if you select the **Notes** check box).

Indicate whether electronic signatures are required Indicate whether employees must electronically sign their timecards and vacation requests.



For instructions on how to create a timecard restriction, see *Create or modify a timecard restriction* on page 42.

Create or modify a timecard restriction

A timecard restriction is a group of rules controlling timecards. You must create timecard restrictions and assign them to all employees.

If you want a large number of employees (such as 1,000 employees) to use a timecard restriction, we recommend that you create multiple timecard restrictions with the same information and assign each of them to smaller groups of employees. If a large number of employees submit timecards that all use the same timecard restriction, time-out errors may occur as each timecard is validated.

Use the following steps to create or modify a timecard restriction. Keep in mind, if you modify a timecard restriction, your modifications will be applied to saved timecards that use that restriction.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Timecard Restrictions** web part, do one of the following:
   - To add a new timecard restriction, click **Add**.
   - To modify an existing timecard restriction, select the restriction and click **Modify**.
4. The Set Up Timecard Restrictions page appears. Enter a name for the timecard restriction.
5. Enter a description for the timecard restriction.
6. Enter the maximum number of hours an employee can enter for a day.
7. To set the minimum and maximum number of hours an employee can enter for a pay period, select the **Pay Period** check box, and then enter the number minimum and maximum of hours.
8. To require employees to provide start and stop times on their timecards, select the **Require Start/Stop Times** check box. Then select a time format:
   - If you select **Use AM/PM Format**, employees must enter time in the following format: 8:00 AM and 5:00 PM.
   - If you select **Use 24-hour Format**, employees must enter time in the following format: 08:00 and 16:00.
9. Select the fields you want employees to be able to view and edit on their timecards.
   - If Payroll is registered in the back office, you can select all the fields shown.
   - If Payroll is not registered in the back office, you can select only the **Notes** field.

   When an employee enters time against a *pay code*, the fields that you select will be available on the employee's timecard. When an employee enters time against a *time code*, only the **Notes** field will be available (that is, if you select the **Notes** check box).
10. Select the **Require signature on timecards and vacation requests** check box to require employees to electronically sign their timecards and vacation requests.

    To require employees to electronically sign their timecards and vacation requests, you'll also need to select the appropriate options on the Document Signatures page. For more information, see *Require electronic signatures* on page 27.
11. Click **Save**.

Assign a timecard restriction

After creating timecard restrictions, assign them to your employees. If an employee is not assigned to a timecard restriction, he or she can't enter timecards.

You can assign timecard restrictions to each employee individually, or to specific groups of employees. For example, you can assign a timecard restriction to all employees in a certain location or department.

Use the following steps to assign a timecard restriction.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Timecard setup**. The Timecard Setup page appears.
3. In the **Timecard Restrictions** web part, select a timecard restriction and click **Assign**. The Assign Timecard Restrictions page appears.
4. From the **Restrict By** list, select a category.

   For example, if you select **Employee**, all employees will be listed, and you can assign the timecard restriction to specific employees. If you select **Department**, all departments will be listed. You can then assign the timecard restriction to all employees in a specific department.

   If the category you selected has a large number of records, it might take a few moments to display all the records.

5. Select the check box for each employee or group you want the timecard restriction assigned to.
6. To assign the timecard restriction to another category of employees, make another selection from the **Restrict By** list. Then select the check box for each employee or group you want the timecard restriction assigned to.

   When you use different categories to assign employees to timecard restrictions, some employees may be assigned to multiple timecard restrictions. For example, let's say you assigned *TimecardRestrictionSales* to all employees in the Sales department and *TimecardRestrictionManagers* to all employees who are managers. Now assume that Michael is the manager of the Sales department. This means he is assigned to both *TimecardRestrictionSales* and *TimecardRestrictionManagers*. However, only one timecard restriction can be used when entering time cards. The timecard restriction an employee will use when entering timecards is determined by the assignment priority. For more information, see Chapter 9, "Assignment priority."

7. To view a list of all employees and groups currently assigned to the timecard restriction, click **View**.
8. Click **Save**.

Delete a timecard restriction

Before deleting a timecard restriction:

- Verify that no employees are assigned to the timecard restriction.
- Verify that all timecards using the timecard restriction have been processed.

Use the following steps to delete a timecard restriction.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Timecard Restrictions** web part, select a timecard restriction and click **Delete**. Confirm that you want to delete the timecard restriction.

Chapter 8: Batch prefixes

When employee timecards are approved and transferred to Microsoft Dynamics GP, they are saved in batches. Batches are used to group transactions in Microsoft Dynamics GP for posting, and are identified by a name or a number.

If the Payroll module is registered in Microsoft Dynamics GP, you must create batch prefixes in Business Portal. The batch prefix you create will identify the Payroll batches in which timecards will be saved in the back office.

After you create a batch prefix, you'll need to assign it to employees. For example, you can create a batch prefix named SALESTIME to identify timecards submitted by the Sales department.

The following sections are included:

- *Create or modify a batch prefix*
- *Assign a batch prefix*
- *Delete a batch prefix*

Create or modify a batch prefix

If the Payroll module is registered in Microsoft Dynamics GP, you must create batch prefixes to identify the Payroll batches in which timecards will be saved in the back office.

If the Payroll module is not registered, you will not be able to complete these steps. Batches are not used in Human Resources.

Use the following steps to create or modify a batch prefix.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Batch Prefixes** web part, do one of the following:

   - To create a batch prefix, click **Add**. The Create Batch Prefix page appears.

   - To modify a batch prefix, select a batch prefix and click **Modify**. The Modify Batch Prefix page appears.

4. Enter the batch prefix.

5. Enter a description for the batch prefix.

6. Click **Save**.

Assign a batch prefix

After creating batch prefixes, assign them to your employees. If an employee is not assigned to a batch prefix, he or she can’t enter timecards.

You can assign batch prefixes to each employee individually, or to specific groups of employees. For example, you can assign a batch prefix to all employees in a certain location or department.

Use the following steps to assign a batch prefix.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard setup**. The Timecard Setup page appears.

3. In the **Batch Prefixes** web part, select a batch prefix and click **Assign**. The Assign Batch Prefix page appears.

4. From the **Restrict By** list, select a category.

   For example, if you select **Employee**, all employees will be listed, and you can assign the batch prefix to specific employees. If you select, **Department**, all departments will be listed. You can then assign the batch prefix to all employees in a specific department.

   If the category you selected has a large number of records, it might take a few moments to display all the records.

5. Select the check box for each employee or group you want the batch prefix assigned to.

6. To assign the batch prefix to another category of employees, make another selection from the **Restrict By** list. Then select the check box for each employee or group you want the batch prefix assigned to.

   When you use different categories to assign employees to batch prefixes, some employees may be assigned to multiple batch prefixes. For example, let’s say you assigned *SALESTIME* to all employees in the Sales department and *MGMNTTIME* to all employees who are managers. Now assume that Michael is the manager of the Sales department. This means he is assigned to both *SALESTIME* and *MGMNTTIME*. However, only one batch prefix can be used for an employee. The batch prefix that will be used for an employee’s timecards is determined by the assignment priority. For more information, see Chapter 9, “Assignment priority.”

7. To view a list of all employees and groups currently assigned to the batch prefix, click **View**.

8. Click **Save**.

Delete a batch prefix

Before deleting a batch prefix:

- Verify that no employees are assigned to the batch prefix.
- Verify that all timecards using the batch prefix have been processed.

Use the following steps to delete a batch prefix.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.
3. In the **Batch Prefixes** web part, select a batch prefix and click **Delete**. Confirm that you want to delete the batch prefix.

Chapter 9: Assignment priority

As part of Time and Attendance setup, you'll need to specify an assignment priority. The following information explains what the assignment priority is and how to configure it.

The following sections are included:

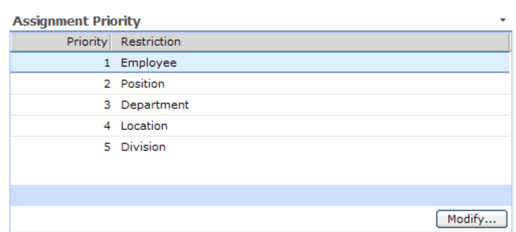
- *Assignment priority overview*
- *Modify the assignment priority*

Assignment priority overview

When you assign employees to pay schedules, timecard restrictions, and batch prefixes, it is possible to assign a single employee to more than one pay schedule, timecard restriction, or batch prefix. For example, suppose you assigned *TimecardRestrictionSales* to all employees in the Sales department and *TimecardRestrictionManagers* to all employees who are managers. Now assume that Michael is the manager of the Sales department. This means he is assigned to both *TimecardRestrictionSales* and *TimecardRestrictionManagers*. However, only one pay schedule, timecard restriction, and batch prefix can be used for an employee's timecard.

The *assignment priority* will determine which timecard restriction will be used when Michael enters his timecards. The assignment priority indicates which assignment type—employee, position, department, location, or division—takes precedence when an employee is assigned to more than one pay schedule, timecard restriction, or batch prefix.

Continuing with the example, assume the assignment priority in the company Michael belongs to looks like the following,



Because position (Michael is a manager) has a higher priority than department (Michael is a member of the Sales department), *TimecardRestrictionManagers* will be used when Michael creates his timecards.

A default assignment priority is provided with HRM. To modify the default assignment priority see, *Modify the assignment priority* on page 52.

Modify the assignment priority

A default assignment priority is provided with HRM. You can view the default assignment priority in the **Assignment Priority** web part on the Timecard Setup page.

You can modify the assignment priority if you need to. Use the following steps to modify the assignment priority.

Do not modify the assignment priority when there are active timecards in the system.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.
3. Review the existing priority in the **Assignment Priority** web part. To make changes, click **Modify**.
4. A dialog box appears, warning you that changes made to the assignment priority could affect timecards in the system. To continue, click **Yes**.
5. The Change Priority of Assignments page appears, displaying the existing priority levels. To change an item's priority, select the item, then click **Move Up** or **Move Down** until the item is at the correct priority level.
6. Continue to select items and move them up or down, as necessary.
7. Click **Save**.

Chapter 10: Pay codes and time codes

When employees enter timecards, they'll enter their hours against pay codes or time codes. The following information explains what pay codes and time codes are, and how to specify which ones your employees can enter time against.

The following information is included:

Pay codes and time codes overview

When employees enter timecards, they'll enter their hours against *pay codes* or *time codes*, depending on which Microsoft Dynamics GP modules you have registered.

Payroll

If Payroll is registered, employees will enter timecards using *pay codes*. Pay codes are used to identify a specific type and rate of pay. For example, employees who are paid a specific hourly rate may have the pay code HOUR assigned to them.

Employees can enter time against pay codes if:

- Pay codes are assigned to them in Payroll.
- Pay codes are based on the following pay types: Hourly, Overtime, Double Time, Vacation, Sick, and Holiday. For more information about pay types, see the documentation for the Payroll module.
- Pay codes are assigned to them on the Employee Assignments page in Business Portal. See *Specify which pay codes and time codes employees can enter time against* on page 54 for more information.

Human Resources

If Human Resources is registered, but not Payroll, employees will enter timecards using *time codes*. Time codes are used to categorize how employees use their time. For instance, time codes can be used to track vacation time, hourly time, and sick time.

Employees can enter time against time codes if:

- Time codes are assigned to them in Human Resources.
- Time codes are based on the following time types: Hourly, Overtime, Benefit, and Absent. For more information about time types, see the documentation for the Human Resources module.
- Time codes are assigned to them on the Employee Assignments page in Business Portal. See *Specify which pay codes and time codes employees can enter time against* on page 54 for more information.

Human Resources and Payroll

If both Human Resources and Payroll are registered, employees will enter timecards using *pay codes*. Pay codes are used to identify a specific type and rate of pay. For example, employees who are paid a specific hourly rate may have the pay code HOUR assigned to them.

Employees can enter time against pay codes if:

- Pay codes are assigned to them in Payroll.
- Pay codes are based on the following pay types: Hourly, Overtime, Double Time, Vacation, Sick, and Holiday. For more information about pay types, see the documentation for the Payroll module.
- Pay codes are assigned to them on the Employee Assignments page in Business Portal. See *Specify which pay codes and time codes employees can enter time against* on page 54 for more information.

Specify which pay codes and time codes employees can enter time against

Use the following steps to specify which pay codes and time codes your employees can enter time against.

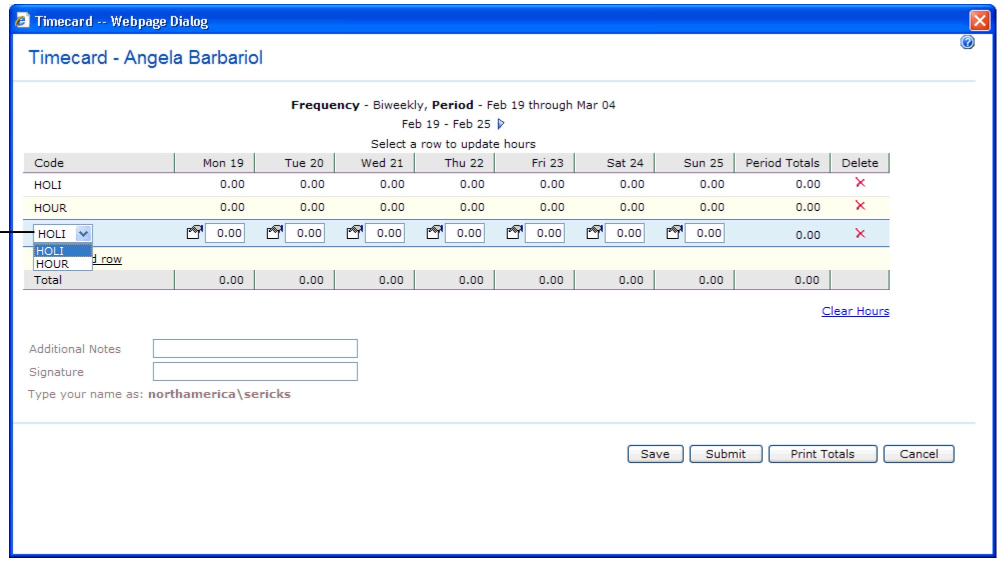
You can also specify which departments and positions your employees can enter time against. For more information, see Chapter 11, "Departments and positions."

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Employee Assignments**. The Employee Assignments page appears.
3. In the **Employee List**, select an employee.
4. In the **Assignments** web part, select the **Pay Code** or **Time Code** option. (The **Time Code** option won't be available if Payroll is registered.)

   All of the pay codes or time codes the employee is assigned to in Microsoft Dynamics GP will be listed, and are marked by default.

5. If there are pay codes or time codes you do not want the employee to enter time against, unmark the appropriate check boxes.

   The pay codes and time codes that are marked will be available in a drop-down list on the employee's timecard. (Unmarked codes will not appear in the list.)



The pay codes or time codes that are marked on the Employee Assignments page will be displayed in this list.

The pay codes and time codes listed on the Employee Assignments page are the codes assigned to the employee in Microsoft Dynamics GP. Marking or unmarking a code on this page does not affect the back office. For example, if you unmark a pay code, the employee will not be able to enter time against that pay code in Business Portal. However, the pay code will still be assigned to the employee in Microsoft Dynamics GP.

6. Click **Save**.

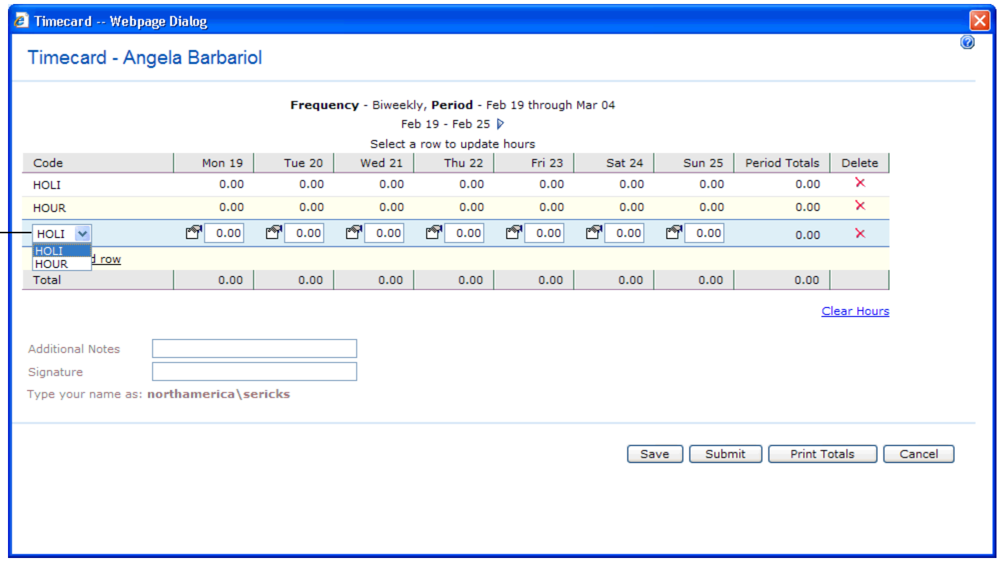
How pay codes and time codes are displayed in the HRM Self Service Suite

Pay codes and time codes are displayed in several places in the HRM Self Service Suite. The following information describes where they are displayed, and explains how your settings in the back office determine which type of code is displayed.

Timecard page

The Timecards page displays either pay codes or time codes.

Pay codes or time codes are displayed in this list.



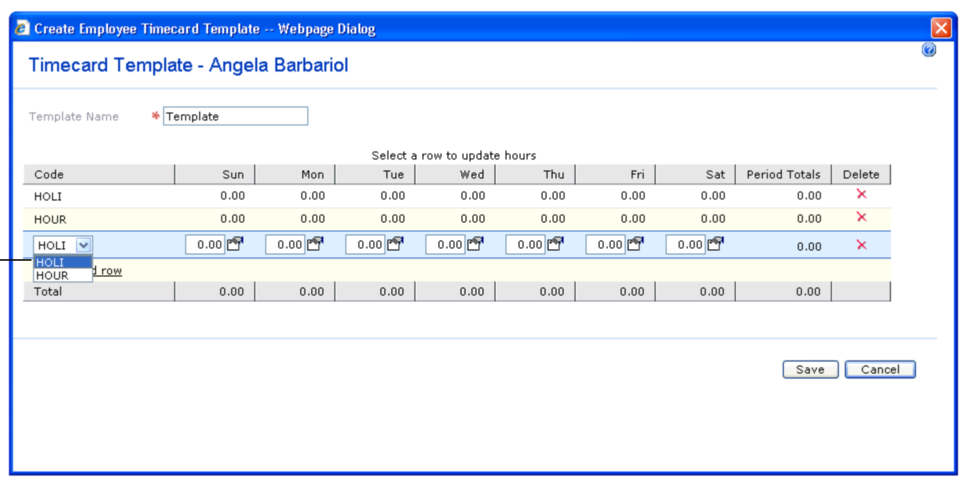
Your back office settings determine which codes are displayed.

If this module is registered...	These codes are displayed...
Payroll	Pay codes
Human Resources	Time codes
Payroll and Human Resources	Pay codes

Timecard Template page

The Timecard Template page displays either pay codes or time codes.

Pay codes or time codes are displayed in this list.



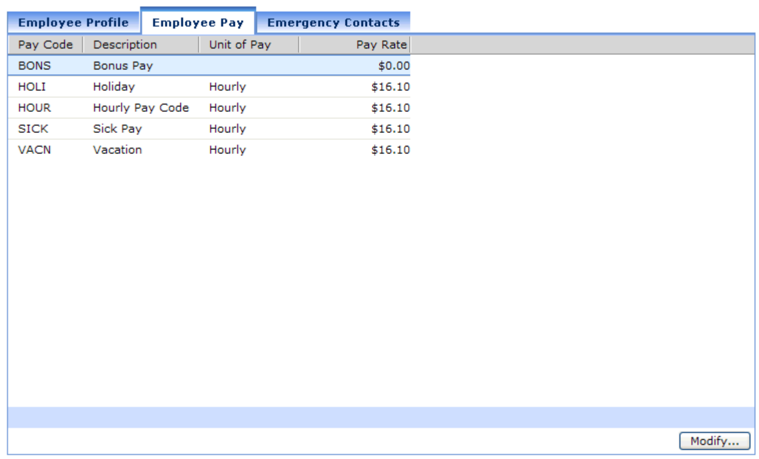
Your back office settings determine which codes are displayed.

If this module is registered…	These codes are displayed…
Payroll	Pay codes
Human Resources	Time codes
Payroll and Human Resources	Pay codes

Employee Pay tab

The **Employee Pay** tab on the Team Profile page displays pay codes only.

Pay codes are displayed on the ***Employee Pay*** *tab.*



If Payroll is not registered, this tab is blank.

Compensation History web part

The **Compensation History** web part on the Team Job History page displays pay codes only.

Pay codes are displayed in the ***Compensation History*** *web part.*

If Payroll is not registered, this web part is blank.

How time off information is displayed in the HRM Self Service Suite

Time off information is displayed in the following places in the HRM Self Service Suite:

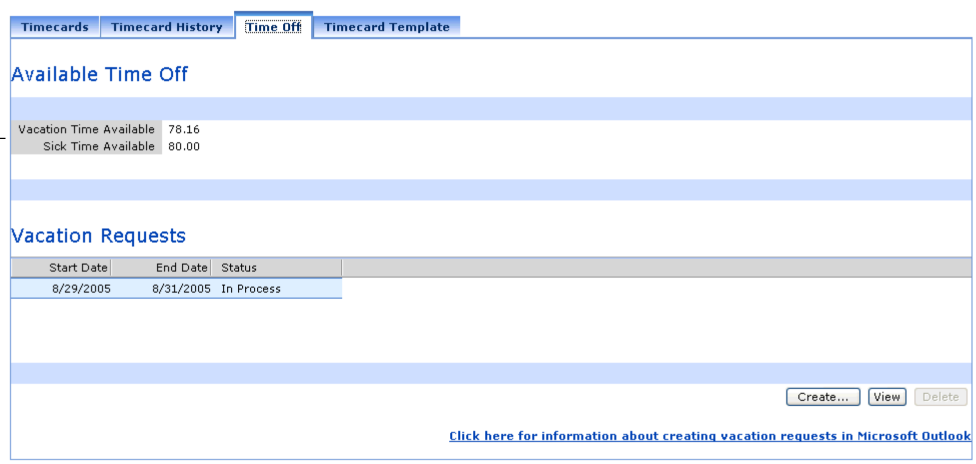
- **Paychecks** tab of the Pay page
- **Time Off** tab of the Timecard Entry page
- **Time Off Summary** tab of the Team Timecard Entry page

Your back office settings determine how time off information is displayed.

If this module is registered...	This is displayed...
Payroll	Vacation and sick time balances
Human Resources	Time codes are displayed if the **Print Available Time on Payroll Checks** option is selected in the Microsoft Dynamics GP Employee Attendance Maintenance window.
Payroll and Human Resources	Vacation and sick time balances are displayed if the **Accrue Type** field is set to **Payroll** in the Microsoft Dynamics GP Attendance Setup window. Time codes are displayed if the following conditions are met: 1. The **Accrue Type** field is set to **Human Resources** in the Microsoft Dynamics GP Attendance Setup window. 2. The **Print Available Time on Payroll Checks** option is selected in the Microsoft Dynamics GP Employee Attendance Maintenance window.

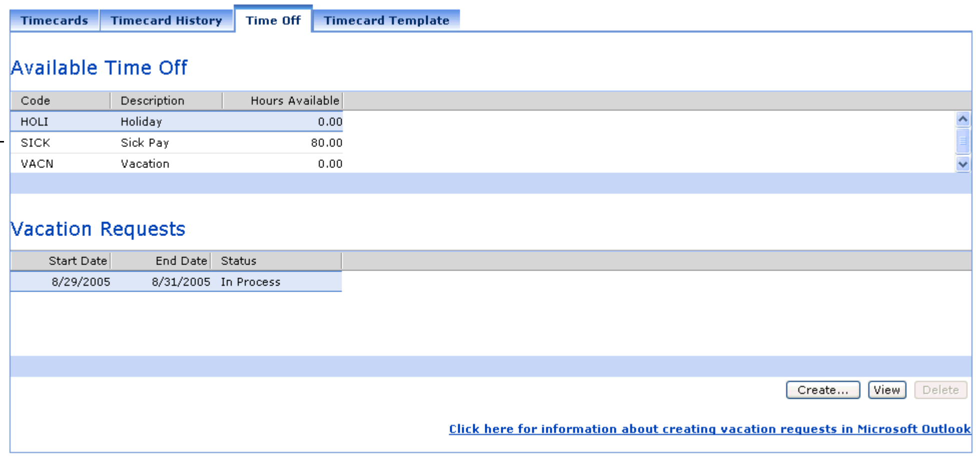
For example, if you have only Payroll registered, vacation and sick time balances are displayed.

Vacation and sick time balances are displayed when Payroll is registered.



If you have only Human Resources registered, and the **Print Available Time on Payroll Checks** option is selected in the Employee Attendance Maintenance window, time codes are displayed.

*Time codes are displayed when Human Resources is registered and the **Print Available Time on Payroll Checks** option is selected.*



Chapter 11: Departments and positions

Some of your employees may need to enter time against multiple departments or positions. For example, you may have an employee who needs to enter time for hours worked for both the Accounting and Purchasing/Receiving departments.

To enable employees to enter time against multiple departments and positions, you'll need to complete two procedures. First, you'll need to give employees permission to select departments and positions on their timecards. Second, you'll need to specify which departments and positions each employee can enter time against.

These procedures are explained in the following sections:

- *Give employees permission to select departments and positions on their timecards*
- *Specify which departments and positions employees can enter time against*

If Payroll is not registered in Microsoft Dynamics GP, there is no need to complete these procedures. Employees can specify a department and position only when entering time against a pay code. They cannot specify a department and position when entering time against a time code.

Give employees permission to select departments and positions on their timecards

To give employees permission to select the department and position that their work applied to, you must modify their timecard restriction to allow it.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Setup**. The Timecard Setup page appears.

3. In the **Timecard Restrictions** web part, select the timecard restriction that applies to the employees who you want to be able to select their department and position when they enter timecards. Click **Modify**.

4. The Set Up Timecard Restrictions page appears. In the **Editable Items** section, select the **Department** and **Position** options.

5. Click **Save**.

Specify which departments and positions employees can enter time against

Use the following steps to specify which departments and positions each employee can enter time against.

You can also specify which pay codes and time codes your employees can enter time against. For more information, see *Chapter 10, "Pay codes and time codes."*

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Employee Assignments**. The Employee Assignments page appears.

3. In the **Employee List**, select an employee.

4. Select the **Department** option. All departments will be listed.

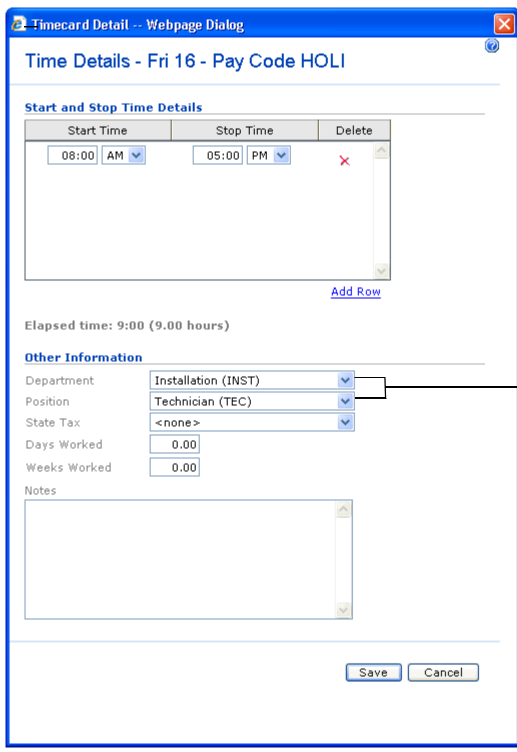
5. Select the departments you want the employee to be able to enter time against.

6. Select the **Position** option. All positions will be listed.

7. Select the positions you want the employee to be able to enter time against.

8. Click **Save**.

   The departments and positions you selected will be available in drop-down lists on the employee's timecard.



The departments and positions you select on the Employee Assignments page will be displayed in these lists.

Chapter 12: Timecard delegates

Not all employees in your organization may have access to a computer to enter their timecards. Therefore, you may want their manager or a specific employee (such as an administrative assistant) to be their *delegate*—another employee who can enter timecards on their behalf. The following information explains how to give an employee the ability to enter timecards on behalf of another employee.

The following sections are included:

- *Give an employee permission to enter timecards for another employee*
- *View timecard delegates*

Give an employee permission to enter timecards for another employee

To give an employee permission to enter timecards for specific employees, or for all employees in a department, complete the following steps.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Timecard Delegates**. The Timecard Delegates page appears.

3. In the **Employee List**, select the employee who will enter timecards on behalf of another employee or employees.

4. In the **Enter Time on Behalf of** web part, select who the employee will enter timecards for. The employee could enter timecards for specific employees, or entire departments.

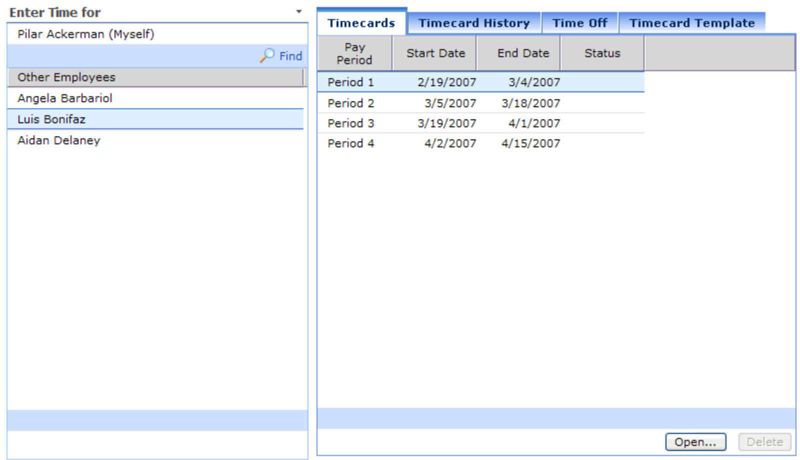
   Employees Select the **Employees** option and select specific employees. For example, you may want to give Pilar Ackerman the ability to enter timecards for Nancy Buchanan and Aidan Delaney.

   Departments Select the **Departments** option and select departments. For example, you may want to give administrative assistant, Diane Tibbot, the ability to enter timecards for all employees in the Shipping department.

5. Click **Save**.

   The employee you selected in the **Employee List** web part now has permission to enter timecards for other employees—and can do so on the Timecard Entry page. For instructions on how to enter timecards, see the HRM Self Service Suite User's Guide.

Pilar Ackerman can enter timecards for these employees.



View timecard delegates

To view a list of the employees who have permission to enter timecards for others, complete the following steps.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Timecard Delegates**. The Timecard Delegates page appears.
3. Click **View All Assignments**. The View All Assignments page appears, displaying a list of employees who have authority to enter timecards for other employees, and the employees they can enter timecards for.

Chapter 13: Vacation requests and Microsoft Office Outlook

Vacation Requests for Microsoft Office Outlook is a feature that integrates Time and Attendance with Microsoft Office Outlook 2007 and Outlook 2010. This integration enables employees to create and save vacation requests in Outlook. The vacation requests will then be sent automatically to Business Portal for manager approval.

The following information explains how to install the required components of the Vacation Requests for Microsoft Office Outlook integration. For information on creating and submitting vacation requests, see the HRM Self Service Suite User's Guide.

This information is divided into the following sections:

- *Install the Outlook add-in*
- *Set up the Outlook add-in*

Install the Outlook add-in

The following steps explain how to install the Vacation Requests for Microsoft Office Outlook add-in. Employees must install the Outlook add-in on the workstations where they will create and submit vacation requests.

1. Close Outlook before installing the Outlook add-in.

2. Open Business Portal and go to the Timecard Entry page.
   Roles > **Employee** > click **Timecard Entry** in the Quick Launch
   -or-
   Employee > click **Timecard Entry** in the Quick Launch

3. Click the **Time Off** tab and click the link to get information about creating vacation requests in Outlook.

4. The Vacation Request for Microsoft Outlook Add-in page opens. Click the link to start the installation wizard.

5. The Welcome window appears. Click **Next**.

6. The License Agreement window appears. Read the terms and conditions, then select **I Agree**, and click **Next**.

7. The Select Installation Folder window appears. Specify the folder where you want the Outlook add-in files installed. The default folder is C:\Documents and Settings\<user>\Application Data\Microsoft\AddIns, where <user> is the login name of the current user of the computer. Click **Next**.

8. The Confirm Installation window appears. Click **Next** to start the installation.

9. The Installation Complete window appears when the installation is complete. Click **Close** to close the installation wizard.

10. The Vacation Request for Microsoft Outlook Add-in page is redisplayed. Click **Close**.

Set up the Outlook add-in

After employees install the Vacation Requests for Microsoft Office Outlook add-in, they'll need to set up the Vacation Requests for Microsoft Office Outlook add-in. For more information, refer to the Human Resources Management Self Service Suite User's Guide.

Part 4: Workflow setup

Workflow is the process used to route and approve documents in the HRM Self Service Suite. Workflow describes how a document “flows” through the system, starting when an employee creates a document, and ending when the document is saved in the back office database.

This part of the documentation provides an overview of the workflow system, and explains how to manage it.

The following information is provided:

- Chapter 14, “Workflow overview,” provides an overview of the workflow system and describes key concepts you’ll need to understand to administer it.
- Chapter 15, “Workflow modifications,” explains how to modify a document’s default workflow.
- Chapter 16, “E-mail notifications,” explains how to configure the workflow system so that users receive e-mail notifications when documents they’ve submitted have been approved or rejected.
- Chapter 17, “Task transfer,” describes how to reassign workflow tasks from one user or role to another user or role.
- Chapter 18, “Workflow event log,” explains how to configure and view the workflow system’s event log.

Chapter 14: Workflow overview

Workflow is the process used to route and approve documents in the HRM Self Service Suite. Workflow describes how a document flows through the system, starting when an employee creates a document, and ending when the document is saved to the back office database.

The following sections provide an overview of the workflow system:

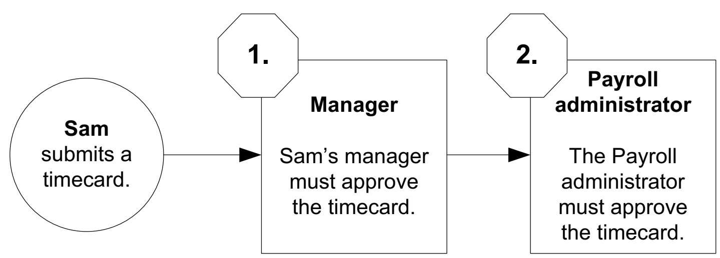
- *Documents and workflows*
- *Default workflows*
- *E-mail notifications*
- *Tasks and task transfer*
- *Workflow event log*

Documents and workflows

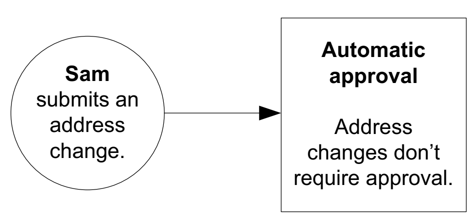
When an employee completes an action in the HRM Self Service Suite, a document is created. For example, when an employee creates a timecard or modifies an emergency contact record, a document is created. The path this document must follow in order to be approved is called *workflow.*

A workflow defines how a document moves through the system—it lists all of the people (or roles) who must approve the document.

Each type of HRM document has its own workflow. For example, you may require a timecard to be approved by the employee's manager and the Payroll administrator.



Consider another example. You may want address changes submitted by employees to be automatically approved. In this scenario, the address change is automatically saved to the back office database without approval from a manager or administrator.



Default workflows

Each type of HRM document is installed with a default workflow. You can modify each document's workflow to fit your business needs. To view the default workflow for each document, and to modify it, see Chapter 15, "Workflow modifications."

E-mail notifications

E-mail notifications are e-mail messages that tell users when documents they've submitted have been approved or rejected, or when documents are assigned to them.

Both document originators and approvers can receive e-mail notifications. For example, a manager can receive an e-mail notification when one of his or her employees has submitted a timecard for approval. The employee can receive a notification when the manager has approved or rejected the timecard.

For information about how to set up e-mail notifications, see Chapter 16, "E-mail notifications."

Tasks and task transfer

Once users at your company begin to submit documents, *tasks* will appear on each user's HR Documents - Assigned to Me page. A task indicates that the user must approve or reject a document.

You might need to assign tasks from one user to another. For example, if a user is on vacation or leaves the company, you will need to transfer the user's tasks to another user. You can transfer tasks using the Workflow Task Transfer page. For more information, see Chapter 17, "Task transfer."

Workflow event log

The workflow system includes an event log, which records information about workflow events, such as when a specific document was submitted and approved.

For more information about the workflow event log, see Chapter 18, "Workflow event log."

Chapter 15: Workflow modifications

Each HRM document has a default workflow. You can modify each document's workflow to fit your business needs on the Workflow Business Processes page.

The following information will help you understand and modify a document's workflow:

- *Document types and default workflows*
- *Set workflow options*
- *Workflow steps*
- *Add or modify a work item step*
- *Resource queries*
- *Modify a business activity step*
- *Specify the starting step*
- *Remove a work item step*
- *View the process log*
- *End, suspend, or resume documents*

Document types and default workflows

Each HRM document has a default workflow. The workflow defines who must approve each document. For example, the default workflow for timecards specifies that a timecard must be approved by the employee's manager.

The following table lists each type of HRM document, and the default user or role responsible for approving it.

Document name	Default approver
Dependent Information	Human Resources Administrator
Emergency Contact Information	Human Resources Administrator
Employee Direct Deposit	Payroll Administrator
Employee Education	Human Resources Administrator
Employee Information (employee profile changes)	Payroll Administrator
Employee Pay Change	Payroll Administrator
Employee Skills	Human Resources Administrator
Employee Tax Information (W-4)	Payroll Administrator
Employee Test Information	Human Resources Administrator
Employee Timecard	Employee's manager (or Payroll Administrator role if employee doesn't have a manager)
Employee Vacation Request	Employee's manager (or Payroll Administrator role if employee doesn't have a manager)
Manager Requisition (job postings)	Human Resources Administrator
Timecard on Behalf of Employee (timecards submitted by managers and delegates)	Payroll Administrator

Set workflow options

The Workflow Business Processes page displays each HRM document's workflow. Each type of document is listed on the left side of the page, and setup options are listed on the right side of the page in the **Options** tab.

For each document type, you must specify whether:

- Users will be able to submit documents.
- Users will be able to remove documents they've submitted from the workflow system.

Use the following steps to set these workflow options.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Business Processes**. The Workflow Business Processes page appears.

3. From the **Business Process List**, select a document type.

4. Select the **Options** tab.

5. To prevent users from submitting new documents of the selected type, select the **Suspend creation of new process instances** check box. For example, if you select the Employee Timecard document type and this check box, users won't be able to submit new timecards.

   You should select this check box if you're going to modify the document's workflow, or if you're going to upgrade the HRM Self Service Suite.

6. To prevent users from removing documents they've submitted from the workflow system (and ending the approval process for them), select the **Disable Terminate option for originator** check box.

7. Click **Save**.

Workflow steps

A document's workflow consists of steps. You can view each step in a document's workflow on the **Steps** tab of the Workflow Business Processes page. Each step has a name, description, and type.

Name The purpose of the step. For example, a step might be named First Required Approver if the purpose of the step is to get initial approval of the document.

Description A brief explanation of the step.

Type Indicates whether the step is a *work item* step or a *business activity* step.

- Work item steps require a user to take some action, such as approving or rejecting the document. Work item steps will appear as tasks in the appropriate user's HR Documents - Assigned to Me page. You can add, modify, and remove work item steps from a document's workflow. For more information, see *Add or modify a work item step* on page 73.

- Business activity steps are automated steps that don't require user action. You can't add or remove business activity steps, but you can modify them. For more information, see *Modify a business activity step* on page 75.

Add or modify a work item step

You can add a work item step—that is, a step that requires user interaction—to a document's workflow, or you can modify an existing work item step.

Before adding or modifying a work item step:

- Verify that there are no active documents of the selected type in the workflow system. To determine whether there are active documents in the system—and to remove active documents if need be—see *End, suspend, or resume documents* on page 78.

- Prevent users from submitting new documents of the selected type. For more information, see *Set workflow options* on page 72.

Use the following procedure to add or modify a work item step.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Business Processes**. The Workflow Business Processes page appears.

3. From the **Business Process List**, select a document type.

4. Select the **Steps** tab.

5. Do one of the following:

   - To add a new work item step, click **Add.** The Add Step page appears.

   - To modify a work item step, select the step and click **Modify**. The Modify Step page appears.

6. Enter a name and description for the step.

7. Select a priority level for the step. The priority level indicates the urgency of the task.

A user can change the priority level when the task appears on the HR Documents - Assigned to Me page.

8. Choose a resource for the step. The resource is the user, role, or reporting structure that is responsible for performing an action, such as approving or rejecting the document.

   - If you choose **Reporting Structure**, select a reporting structure, a resource query, and a query input. See *Resource queries* on page 75 for more information.

   - If you choose **Role**, select a role.

   - If you choose **User**, select a user ID.

9. Enter action settings for the step. Each action you enter is an option that the user will have when this task is assigned to him or her. For example, if the task is to approve or reject a document, you could create two actions: one called "Approve" and another called "Reject."

   Refer to the table for information that must be entered for each action.

Field	Description
Name	Enter a name for the action, such as "Approve."
Description	Enter a brief description of the action, such as "Approve timecard."
Next Step	Select the next step in the document's workflow.
Auto Complete	If you want the action to occur automatically, select the **Auto Complete** check box. If the action requires a user to perform some action, be sure the check box is cleared.
Maximum Traversals	Indicate how many times, up to 50, a user can retry the action before the entire process is terminated. For example, a manager may want an employee to rework his timecard before it can be approved. The manager can redirect the timecard back to the employee, and the employee can make changes and return the timecard to the manager. The number of traversals determines how many times this cycle can be repeated. The default number of maximum traversals is 10.

10. To add another action, click **Add**. A new blank line will be displayed.

*To remove an action, be sure that its check box next to the **Name** field is selected and then click **Remove**.*

11. Repeat steps 9 and 10 until all actions have been defined for the step.

12. Enter information for users who will view details about the document. You can enter a description of the information and a base URL for the document.

13. Click **Save**.

Resource queries

A resource query is a class, or division, within a reporting structure. A parent-child relationship exists between a reporting structure and its resource queries. A resource query cannot exist without its parent reporting structure.

The HRM Self Service Suite includes two resource queries. If you select the **HRM Supervisor Resource** reporting structure, you can select the **Process Query for Payroll Supervisor** resource query. If a supervisor cannot be found, the document will be assigned to the Payroll Administrator. If you select the **HRM Originator Provider** reporting structure, you can select the **Process Query for Originator** resource query.

When a workflow step uses a reporting structure as its resource, the resource query might need input to be able to locate the appropriate resource. You must point the resource query to the piece of information that will help it identify the appropriate resource.

Refer to the table for more information.

Query input	Description
Originator	A resource is identified based on information about the user or role who submitted the document.
Previous Step Assignee	A resource is identified based on information about the user or role who was assigned to the previous step in the workflow.
No Input	No input is required to return the appropriate resource. The same resource is always identified, no matter which user submits the document or which user or role was assigned to the previous step in the document's workflow.

Modify a business activity step

You can modify a business activity step—that is, an automated step that requires no user interaction—in a document's workflow.

Before modifying a business activity step:

- Verify that there are no active documents of the selected type in the workflow system. To determine whether there are active documents in the system—and to remove active documents, if need be—see *End, suspend, or resume documents* on page 78.
- Prevent users from submitting new documents of the selected type. For more information, see *Set workflow options* on page 72.

Use the following procedure to modify a business activity step.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Workflow Business Processes**. The Workflow Business Processes page appears.
3. From the **Business Process List**, select a document type.
4. Select the **Steps** tab.

5. Select a step with the **Business Activity** type.

6. Click **Modify** to open the Modify Business Activity page.

7. Select the step that should follow the successful completion of the business activity step.

8. Select the step that should follow the unsuccessful completion of the business activity step.

9. Click **Save**.

Specify the starting step

You can specify a new starting step for a document's workflow. Before specifying a new starting step:

- Verify that there are no active documents of the selected type in the workflow system. To determine whether there are active documents in the system—and to remove active documents, if need be—see *End, suspend, or resume documents* on page 78.

- Prevent users from submitting new documents of the selected type. For more information, see *Set workflow options* on page 72.

Use the following procedure to specify a new starting step for a document's workflow.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Business Processes**. The Workflow Business Processes page appears.

3. From the **Business Process List**, select a document type.

4. Select the **Steps** tab.

5. Select the step that you want to be the starting step.

6. Click **Set Starting Step**.

7. A message is displayed, asking if you're sure you want the selected step to become the starting step. Click **Yes**.

   The starting step will be marked with an asterisk (*).

Remove a work item step

You can remove a work item step from a document's workflow. When you remove a work item step, be sure to carefully review the remaining steps in the workflow so that no gaps are created in the document's approval process.

Before removing a work item step:

- Verify that there are no active documents of the selected type in the workflow system. To determine whether there are active documents in the system—and to remove active documents if need be—see *End, suspend, or resume documents* on page 78.
- Prevent users from submitting new documents of the selected type. For more information, see *Set workflow options* on page 72.
- Verify that the work item step you are going to remove is not the starting step. If it is the starting step, you must select a new starting step. See *Specify the starting step* on page 76 for more information.

Use the following procedure to remove a work item step from a document's workflow.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Workflow Business Processes**. The Workflow Business Processes page appears.
3. From the **Business Process List**, select a document type.
4. Select the **Steps** tab.
5. Select the work item step you want to remove.
6. Click **Remove.**
7. A message is displayed, asking if you're sure you want to remove the step. Click **Yes**.

View the process log

The process log lists all documents in the workflow system. It lists the title (or subject) of the document, the date and time the document was submitted, the user or role that is currently assigned to the document, and the current status of the document.

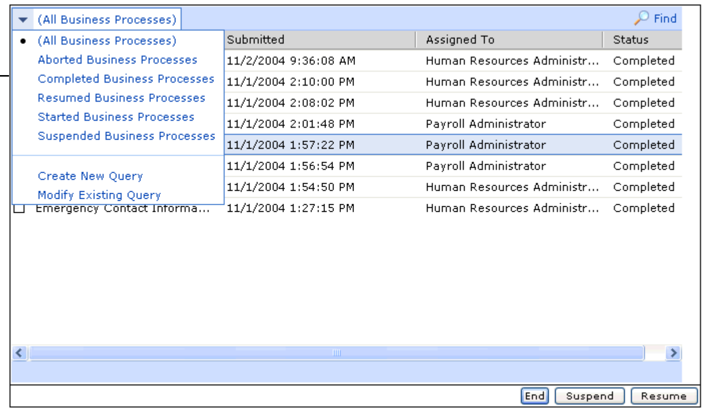
Use the following steps to view the process log.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Workflow Process Log**. The Workflow Process Log page appears.

3. Select a document. Comments, action history, and details about the document are displayed on the right side of the page.

4. To filter the documents in the process log, click the arrow in the upper-left of the process log and select from the list of filter options.

You can filter the documents displayed in the process log.



End, suspend, or resume documents

You can end, suspend, or resume HRM documents using the Workflow Process Log page.

End If you click **End**, the selected document's status changes to Aborted. This means the document has been permanently removed from the workflow system.

Suspend If you click **Suspend**, the selected document's status changes to Suspended. This means the document's workflow has been paused. If you later want the document's workflow to continue, you can click **Resume**.

Resume If you click **Resume**, the suspended document's workflow will continue. The document will be processed beginning with the workflow step from which it was suspended. You cannot resume documents that have the Aborted status.

Users can use the HR Documents - Submitted by Me page to end, suspend, or resume documents they created. Refer to the Human Resources Management Self Service Suite User's Guide for more information.

Use the following steps to end, suspend, or resume a document.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Process Log**. The Workflow Process Log page appears.

3. Select the check box next to a document.

4. Click the **End**, **Suspend**, or **Resume** button.

Chapter 16: E-mail notifications

E-mail notifications are e-mail messages that tell users when a workflow event has occurred, such as when documents have been assigned to them, or when documents they've submitted have been approved or removed from the workflow system.

Both document originators and approvers can receive e-mail notifications. For example, a manager can receive an e-mail notification when one of his or her employees has submitted a timecard for approval. The employee can receive a notification when the manager has approved or rejected the timecard.

The following information explains how to set up e-mail notifications:

- *Enter e-mail addresses*
- *Enter the name of your SMTP server*
- *Set up e-mail notifications*
- *Message text*

Enter e-mail addresses

In order for users to receive e-mail notifications, the Business Portal administrator must enter each user's e-mail address on the Users page.

For more information on how to enter users' e-mail addresses, see the Business Portal Administrator's Guide.

Enter the name of your SMTP server

In order to use e-mail notifications, the Business Portal administrator must enter the name of your Simple Mail Transfer Protocol (SMTP) server and a from e-mail address on the E-mail and Terminal Services page.

For instructions on how to enter the name of your SMTP server, see the Business Portal Administrator's Guide.

Set up e-mail notifications

Use following steps to set up e-mail notifications.

Before you set up e-mail notifications, enter your users' e-mail addresses and the name of the server that will manage the e-mail notifications. For more information, see Enter e-mail addresses on page 79 and Enter the name of your SMTP server on page 79.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Process Options**. The Workflow Process Options page appears.

3. Click the **Subscriptions** tab.

4. Select whether to notify users when documents are assigned to them, when documents they've submitted have been processed, or both.

    - If you select **When they are assigned tasks**, users will be notified when a task appears on their HR Documents - Assigned to Me page.

    - If you select **When a task related to a business process they started completes**, users will be notified when documents they've submitted have been approved or rejected.

5. Indicate if users should be notified when business processes (documents) are:

    - Started
    - Suspended
    - Resumed
    - Terminated
    - Completed

6. Click **Save**.

Message text

The text that appears in e-mail notifications indicates what action has occurred in the workflow system. For example, if you submitted a document, the e-mail notification you receive says:

Process was started successfully.

If you submit a vacation request and the Payroll Administrator approves it, the e-mail notification you receive says:

Task has been completed by Role: Payroll Administrator. The result of this task is: Approve

You cannot modify the text that appears in e-mail notifications.

Chapter 17: Task transfer

Once users at your company begin to submit documents, *tasks* will appear on each user's HR Documents - Assigned to Me page. A task indicates that the user must approve or reject a document.

You might need to transfer tasks from one user to another. For example, if a user is on vacation or leaves the company, you will need to transfer the user's tasks to another user. You can transfer tasks using the Workflow Task Transfer page.

This information is divided into the following sections:

- *When to transfer tasks*
- *Transfer tasks from one user or role to another*

When to transfer tasks

Task transfer is meant to be used primarily when a user is on vacation, unexpectedly out of the office, or leaves the company.

When you transfer tasks, all of the tasks that are assigned to a user or role are moved to a new user or role; you cannot choose to reassign only some tasks, or to reassign different tasks to different users.

Transfer tasks from one user or role to another

Use the following steps to reassign tasks from one user or role to another user or role.

Be aware that tasks will continue to be assigned to a user or role until the underlying workflow, or business process, is modified. If you remove a Business Portal user before you've made those modifications, business processes that create tasks for the user will fail.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Task Transfer**. The Workflow Task Transfer page appears.

3. Select the **User** or **Role** option above the left scrolling window to specify whether you're transferring tasks from a user or role. If you select **User**, all users will be displayed in the scrolling window. If you select **Role**, all roles will be displayed.

   Then select the specific user or role you want to remove tasks from.

4. Select the **User** or **Role** option above the right scrolling window to specify whether you're transferring tasks to a user or role. If you select **User**, all users will be displayed in the scrolling window. If you select **Role**, all roles will be displayed.

   Then select the specific user or role you want to assign tasks to.

5. Click **Transfer**.

6. A message is displayed, stating that more tasks may be assigned to the resource unless the underlying workflow, or business process, is updated. To continue transferring the tasks, click **Yes**.

The Workflow Task Transfer page is used to assign tasks from one user or role to another. However, in cases where a document has been resubmitted, you must reassign tasks. For example, suppose Bob's tasks have been transferred to Juan. When Sue (Bob's direct report) submits her timecard, it is automatically routed to Juan for approval. If Juan rejects the timecard, and Sue resubmits it, the timecard is routed to Bob for approval. In this scenario, you will need to reassign Bob's tasks to Juan.

Chapter 18: Workflow event log

The workflow system includes an event log that records information about workflow events, such as when a specific document was submitted and approved.

Information about the workflow event log is divided into the following sections:

- *Select events to track in the workflow event log*
- *Set the workflow event log size and removal options*
- *View the workflow event log*
- *Delete events from the workflow event log*

Select events to track in the workflow event log

The workflow event log is the audit trail for workflow events. Use the following steps to specify which events are tracked in the workflow event log.

Workflow events are tracked in the workflow event log and the Windows event log.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Process Options**. The Workflow Process Options page appears.

3. Click the **Subscriptions** tab.

4. In the **Event Subscriptions** section, select the events to track:

   - If you select **When tasks are created**, all tasks that are created and assigned to users will be tracked in the event log.

   - If you select **When tasks are completed**, all completed tasks will be tracked.

   Be aware that workflow events are tied to the action history of a business process. If ***When tasks are completed*** *is not selected, the action history will not include information about the action taken for a task.*

5. Click **Save**.

Set the workflow event log size and removal options

The workflow event log stores information about workflow events, including the type of event, when the event was logged, and the action taken when the event occurred.

You can save an unlimited number of events in the event log, or you can set a specific number of events to save. If you choose to specify a number of events, you'll need to choose a method for removing events when the event log reaches its maximum size.

Use the following steps to set the workflow event log size and removal options.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Process Options**. The Workflow Process Options page appears.

3. Select the **General** tab.

4. Select whether to save an unlimited or limited number of events in the event log. If you select **Limited**, enter the maximum number of events that can exist in the event log.

Action history information that is displayed on the HR Documents - Assigned to Me, HR Documents - Submitted by Me, and Workflow Process Log pages comes from the workflow event log. If you restrict the size of the workflow event log too much, you could lose action history information your users might need.

5. If you selected to limit the size of the event log, choose a method for removing events.

   - If you select **Based on a set number of days**, enter a number of days; events older than this will be removed automatically once the event log reaches its maximum size. If the number of events logged for a period is greater than the maximum size you've selected for the event log, no additional events will be tracked in the event log.

   - If you select **As needed**, the oldest events will be removed when the event log reaches the size you specified.

   - If you select **Manually**, no additional events will be tracked in the event log when it reaches its maximum size until events are manually deleted. (The Windows event log will continue to record events when the workflow event log reaches its maximum size.) See *Delete events from the workflow event log* on page 85 for more information about removing events from the event log.

6. Click **Save**.

View the workflow event log

Use the following steps to view the workflow event log.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **HRM Self Service**, click **Workflow Event Log**. The Workflow Event Log page appears.

3. Select an event in the list. The following will be displayed on the right side of the page:

   Type The type of event. *Information* events indicate a successful action, such as the successful start of the workflow process.

   Title The name of the event.

   Logged The date and time when the event was logged.

   Source Where the event occurred within the document's workflow.

Description Indicates whether the process was successfully started or completed.

Event Category The event category that the event belongs to: system, business, or execution.

Process Instance ID The ID associated with the event's business process instance. A process instance ID represents a separate thread of execution of a business process.

Delete events from the workflow event log

Use the following steps to delete one or more events from the event log.

If you delete events, you won't be able to view the associated action history. For example, if you delete events that resulted from approving a document, you won't be able to see the action history details for that document approval in other parts of Business Portal.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **HRM Self Service**, click **Workflow Event Log**. The Workflow Event Log page appears.
3. Select the check box next to the event you want to delete.
4. Click **Delete**.

Part 5: Groups and roles reference

This information provides details about the SharePoint groups and MBF roles that are used with the HRM Self Service Suite.

- Chapter 19, "Default group and role permissions," lists the default permissions associated with the SharePoint groups and MBF roles used with the HRM Self Service Suite.

Chapter 19: Default group and role permissions

This information lists the default permissions associated with the SharePoint groups and MBF roles that are used with the HRM Self Service Suite.

For more information about SharePoint groups and MBF roles, see the Business Portal Administrator's Guide.

This information is divided into the following sections:

- *SharePoint groups*
- *MBF roles*
- *Advanced MBF roles*

SharePoint groups

SharePoint groups are used to grant access to Business Portal sites and pages. The permission levels associated with each group define the level of control users have over the securable items on those pages, such as web parts.

SharePoint permission levels control whether users can modify SharePoint content, such as pages and document libraries. For example, a user who has the Read permission level for a page can't modify the page or the web parts on it. Permission levels do not affect a user's access to Microsoft Dynamics GP data. This means that a user with the Read permission level for a page still may be able to create transactions, modify records, or delete entries using that page.

The following table lists the SharePoint groups that are used with the HRM Self Service Suite, and includes the HRM-specific pages and permission levels associated with each group. See the Business Portal Administrator's Guide for additional information about these SharePoint groups.

Group	Site	Page library	HRM-specific page	Permission level
BP Employee	Employee Center	Employee Center Pages	Profile	Read
		HRM Employee Pay Pages	Pay	Read
		HRM Employee Pay Pages	Benefits	Read
		HRM Skills and Training Pages	Skills and Training	Read
		HRM Time and Attendance Pages	Timecard Entry	Read
		HRM Employee Profile Pages	HR Documents - Submitted by Me	Read
		HRM Employee Profile Pages	HR Documents - Assigned to Me	Read
	Company Center	HRM Recruitment Pages	Careers	Read
		HRM Skills and Training Pages	Training	Read
		HRM Employee Profile Pages	Organization Structure	Read
BP HR Administrator	Human Resources Center	HRM Time and Attendance Pages	Timecard Status	Read
BP HR Workflow Administrator	Top-level Business Portal site	HRM Employee Profile Pages	Workflow Business Processes	Read
		HRM Employee Profile Pages	Workflow Process Options	Read
		HRM Employee Profile Pages	Workflow Process Log	Read
		HRM Employee Profile Pages	Workflow Event Log	Read
		HRM Employee Profile Pages	Workflow Task Transfer	Read

Group	Site	Page library	HRM-specific page	Permission level
BP HRM Self Service Administrator	Top-level Business Portal site	HRM Employee Profile Pages	Document Signatures	Read
		HRM Employee Profile Pages	Default Address ID	Read
		HRM Employee Profile Pages	Direct Reports View	Read
		HRM Time and Attendance Pages	Timecard Setup	Read
		HRM Time and Attendance Pages	Employee Assignments	Read
		HRM Time and Attendance Pages	Timecard Delegates	Read
	Company Center	Company Center Common Pages	Company Center Home	Contribute
	Employee Center	Employee Center Common Pages	Employee Center Home	Contribute
	Manager Center	Manager Center Common Pages	Manager Center Home	Contribute
BP Manager	Manager Center	HRM Employee Profile Pages	Team Profile	Read
		HRM Employee Profile Pages	Team Job History	Read
		HRM Skills and Training Pages	Team Skills and Training	Read
		HRM Time and Attendance Pages	Team Timecard Entry	Read
		HRM Time and Attendance Pages	Timecard Status	Read
		HRM Recruitment Pages	Recruiting	Read
BP Payroll Administrator	Payroll Center	HRM Time and Attendance Pages	Timecard History	Read
		HRM Time and Attendance Pages	Timecard Status	Read
	Top-level Business Portal site	HRM Time and Attendance Pages	Timecard Delegates	Read

MBF roles

MBF roles are used to grant access to Business Portal data. The data permissions associated with each role control access to the back office data that can be displayed in Business Portal.

The following table lists the MBF roles that are used with the HRM Self Service Suite, and includes the data permissions associated with each role. See the Business Portal Administrator's Guide for additional information about these MBF roles.

Role	HRM-specific data permissions
HRM Self Service Administrator	AdministrativeTimecardTemplate - All AssignmentHeirarchy - All BackOfficeSettings - All BatchPrefix - All Employee - Restricted Directory Information HRMSetup - All HRPayschedule - All HRPayscheduleYear - All LifeEventLink - All PRPayschedule - All SignatureSettings - All
Human Resources Administrator	BatchPrefix - All EmployeeTimecardTemplate - All HRMSetup - All HRPayschedule - ReadOnly Payschedule - All Payschedule - ReadOnly PRPayschedule - ReadOnly Timecard - All

Role	HRM-specific data permissions
Payroll Administrator	BatchPrefix - All HRMSetup - All HRPayschedule - ReadOnly Payschedule - All Payschedule - ReadOnly PRPayschedule - ReadOnly Timecard - All
Workflow Administrator	WorkItem Reassignment

Advanced MBF roles

Advanced MBF roles map Business Portal users to specific IDs in the back office, such as employee or salesperson IDs. This allows these users to access their personal data—for example, employee paystubs or salesperson commission information. The data permissions associated with each advanced role control access to the back office data that can be displayed in Business Portal.

The following table lists the advanced roles that are used with the HRM Self Service Suite, and includes the data permissions associated with each role. See the Business Portal Administrator's Guide for additional information about these advanced MBF roles.

Role	HRM-specific data permissions
Employee	Employee - Restricted Proxy (Timecard Entry) EmployeeTimecardTemplate - Restricted Proxy EmployeeTimecardTemplate - Restricted Self HRMSetup - All Timecard - Restricted Proxy Timecard - Restricted Self
Manager	EmployeeTimecardTemplate - Restricted Manager HRMSetup - All HRPayschedule - ReadOnly Payschedule - ReadOnly PRPayschedule - ReadOnly Timecard - Restricted Manager

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