SUNGARD PUBLIC SECTOR

EMPLOYEE ONLINE

IFAS
Integrated Financial &
Administrative Solution

Should you wish to make a comment, or if you find an error in the text, please contact us via email:

doc@bi-tech.com

Document Change Log

Version	Date	Change Description
7.9.4	July 2009	7.9.4 Version

Contents

1 Employee Online Overview

Employee Online (EO) is a Web-based system that enables employees to easily access their employment records. In many instances, employees are granted permission to modify their records. The interactive nature of Employee Online enables end users to have better access to, and greater input into, their employment records. Employee Online operates as a Portal Application in the 7i Dashboard.

1.1 Objectives

- Employee Online User Overview
- Getting Employee Online Started
- EO Development Requests
- Client Specific Files
- EO Administration
- EO Mapping and Change Requests
- W-2 Work Flow
- Frequently Asked Questions (FAQ)

1.2 Key Features

- Read access to employment records
- Update personal information
- Benefit Open Enrollment
- Download Forms
- Print Checks and W-2 Information
- Employee Online Administrator Rights

1.3 Accessing Permissions

To protect confidential information, Employee Online requires users to log in using a valid Employee ID and password. The EO administrator establishes initial passwords. The login page can be set to request a password change when users first login. Login permissions are designed to provide two levels of access. One level is for normal EO users. The other is for an Administrator EO user.

1.4 Common Codes

Common Codes are used to establish and modify many settings within Employee Online. These common codes are required for the application to run properly. Refer to the Common Code setup section in this manual for more information and the use of these codes. Along with the standard functions provided by EO, some modules allow for a client specific link to be shown at the bottom of the screen. These modules are BENEFITS, PERSONAL, DIRDEP, DEFCOMP, SAVBONDS, TAX, TRAIN, PAYCHK, JOBPOS, and EMPDIR.

1.5 Date Policy

By design, Employee Online does not show dates to users. EO recognizes the present date and how it fits into the normal payroll cycles defined at a site. It is possible to display the dates that EO is currently using by setting the Assoc Code 01 of the EOCD MASTER common code to "SHOW DATES".

1.6 Change Requests

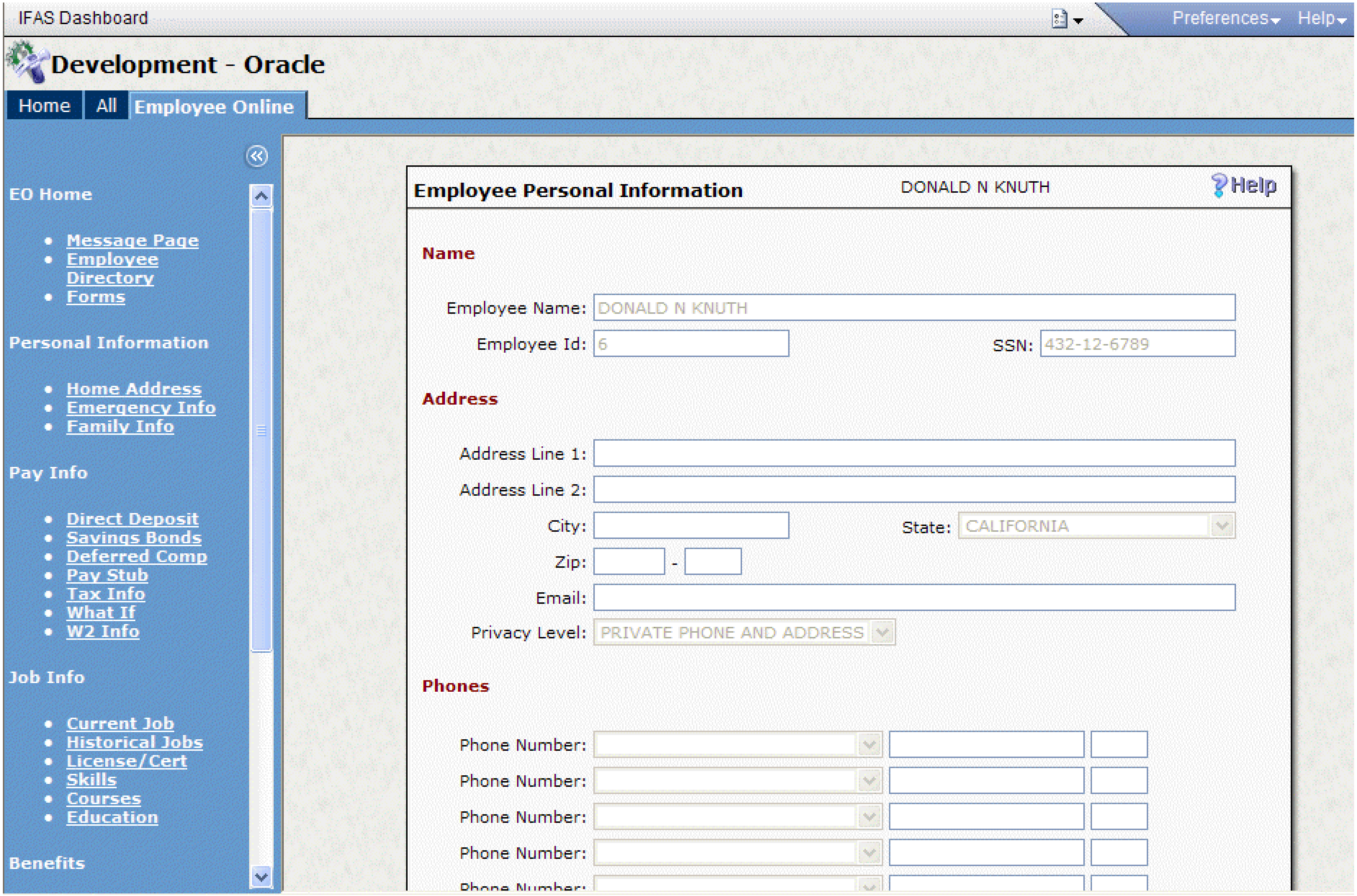
Requests made in Employee Online usually map directly to the related table in the HR database. Thus, a Direct Deposit request in EO shows and modifies data from the hr_dirdep table which can be viewed from the Direct Deposit (HRPYCA) screen. Updates that change the related HR table will be approved on that screen. Benefits map to the EO transaction screen (HREOTR) and approvals are made on this screen before it changes the HR benefits screens. It is important to remember that the approval of EO requests causes changes to be made in the Payroll subsystem. The timing of EO approvals should be done with this in mind. Approvals should not be done while a previous payroll is being processed. The EO approvals need to be complete before the Payroll for the Effective Period is run. The timing and personnel involved in the approval process will vary from organization to organization.

2 Using Employee Online

Successful logon to EO leads users to the Message Board. The system administrator periodically changes the "message of the day" to provide timely information and announcements. A site map for Employee Online is located along the left hand side of the Web browser. The map is organized into broad groups of related functional areas. Clicking one of the bulleted items is used to proceed to a specific area of interest. This site map can be configured specifically for each site using the following file: <ifas7>/App_Code/EmpOnline/ClientSpecific/menu.xml.

2.1 Employee Online Homepage

The Employee Online site map is a tool that lets users navigate through the application. You will find the site map running down the left side of Employee Online, as shown below:


IFAS Dashboard
Preferences
Help
Development - Oracle
Home
All
Employee Online
EO Home
Message Page
Employee Directory
Forms
Personal Information
Home Address
Emergency Info
Family Info
Pay Info
Direct Deposit
Savings Bonds
Deferred Comp
Pay Stub
Tax Info
What If
W2 Info
Job Info
Current Job
Historical Jobs
License/Cert
Skills
Courses
Education
Benefits
Employee Personal Information
DONALD N KNUTH
Help
Name
Employee Name: DONALD N KNUTH
Employee Id: 6
SSN: 432-12-6789
Address
Address Line 1:
Address Line 2:
City:
State: CALIFORNIA
Zip: -
Email:
Privacy Level: PRIVATE PHONE AND ADDRESS
Phones
Phone Number:
Phone Number:
Phone Number:
Phone Number:
Phone Number:

2.2 Message Board

A successful login presents the user with the "Message Board" which is a convenient place for the administrator to post system updates and other information relevant to your organization. The welcome and instructions area of the message board can be customized by the system administrator to contain almost any desired content. The message board can be updated via the following files EOHomeWelcome.ascx and EOHomeInstructions.ascx file. The EO Date control reads from the systems pay period screen and cannot be modified. In most situations, the administrator may not want to burden the user with the complexity of the EO Date control and that is why it can be turned off completely via the EO administration screens.

Welcome

Welcome to the Sandpoint School District's Employee Online web site. This site provides a way for you to keep your payroll information up to date.

Please feel free to browse your current payroll setup and make changes as needed.

Next payday will be 6/30/2007. Requests made in Employee Online prior to midnight 6/21/2007 will be considered for the check of 6/30/2007.

The Sandpoint School Disctrict is an Equal Opportunity Employer.

EO Dates

Here's a look at Employee Online Dates.

Period	Per #	Beg-End	Check
LastDisp	701004	4/1/2007-4/30/2007	4/30/2007
Closing	701005	5/1/2007-5/31/2007	5/30/2007
Next	701006	6/1/2007-6/30/2007	6/30/2007
Effective	701006	6/1/2007-6/30/2007	6/30/2007

The as of date is 6/11/2007.
The cutoff date is 6/21/2007.

Instructions

Step 1: Choose an area
Select the tab for the area with the information that you want to change.

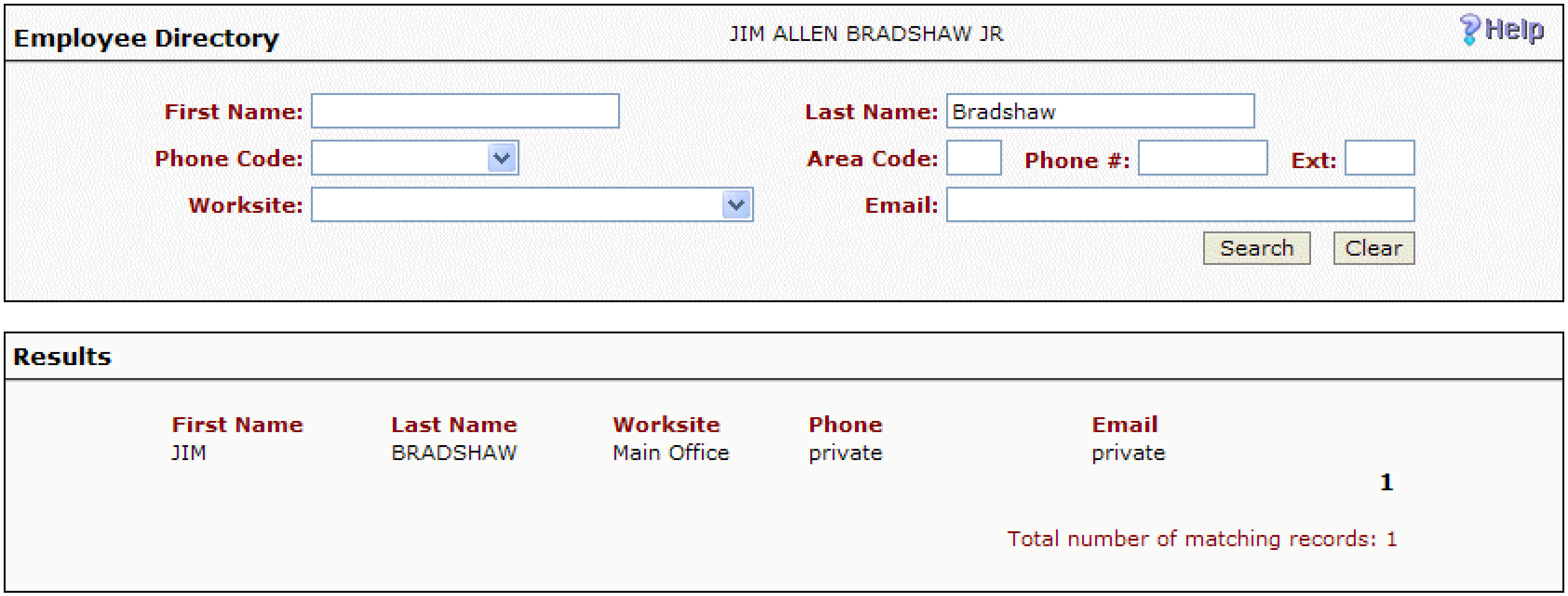
Step 2: Select the record that you would like to modify.
Choose the record you would like to modify.

Step 3: Submit request
Click on the button to submit your request.

Step 4: Repeat as needed.
Repeat the process in other areas of Employee Online as needed.

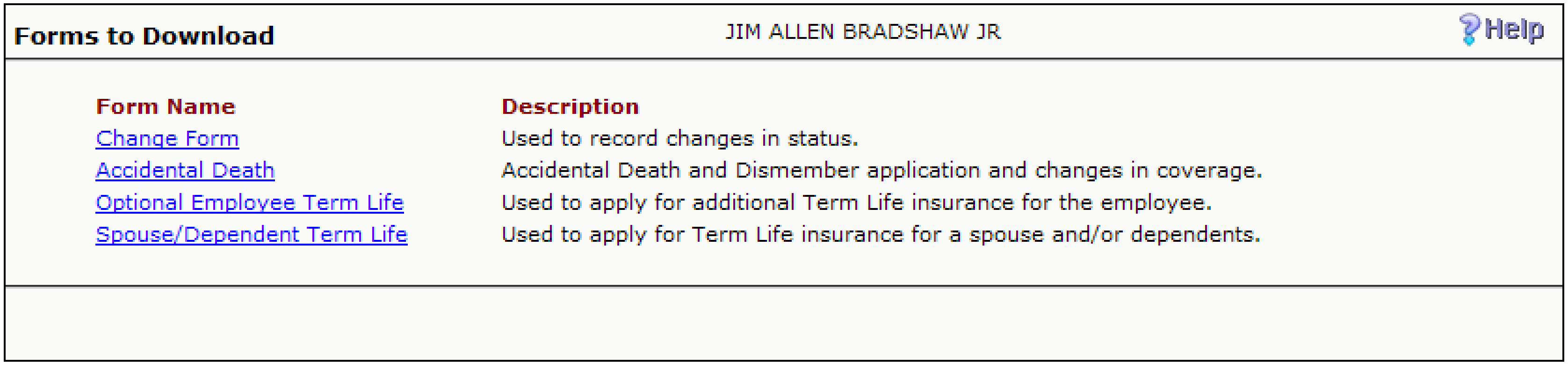
2.3 Employee Directory

Listing of employee names, phone numbers, and e-mail addresses, are visible in HREMEN. This page allows for the ability to search for employees based on configurable search criteria such as names, telephone numbers, telephone number types, locations, and e-mail addresses. Depending on the presence of a valid public email address, it is possible to initiate an email from this page to be sent to an Employee.



Forms

This screen provides a convenient place to allow for the download of material that is to be distributed to Employees. Typical entries might include forms for request that require a physical form to be submitted. The CSMiscForms.ascx section, located below, describes how to create entries on this screen.



Personal Information

This Home Address page maps to the hr_empmstr and hr_addrwloc tables, and can be viewed in HREMEN. From here, employees may view and update employee home address information, including email and phone numbers. Click the Edit icon in the bottom right corner to modify this information.

Employee Personal Information JIM ALLEN BRADSHAW JR ? Help

Name

Employee Name: JIM ALLEN BRADSHAW JR

Employee ID: JIMBR SSN: ***-**-9675

Address

Address Line 1: 323 ELM STREET

Address Line 2: APT #42

City: PARADISE State: CALIFORNIA

Zip: 95969 - 0042

Email: JBRADSHAW@YAHOO.COM

Privacy Level: PRIVATE PHONE AND ADDRESS

Phones

Phone Number:	OFFICE PHONE	(530) 263-4531	8923
Phone Number:	HOME PHONE	(530) 287-6943	
Phone Number:	CELL PHONE	(530) 228-2311	
Phone Number:	FAX NUMBER	(530) 263-4532	
Phone Number:	MESSAGE PHONE	(530) 228-2566	
Phone Number:	MESSAGE PHONE	(530) 228-9865	

Edit

2.4 Emergency Information

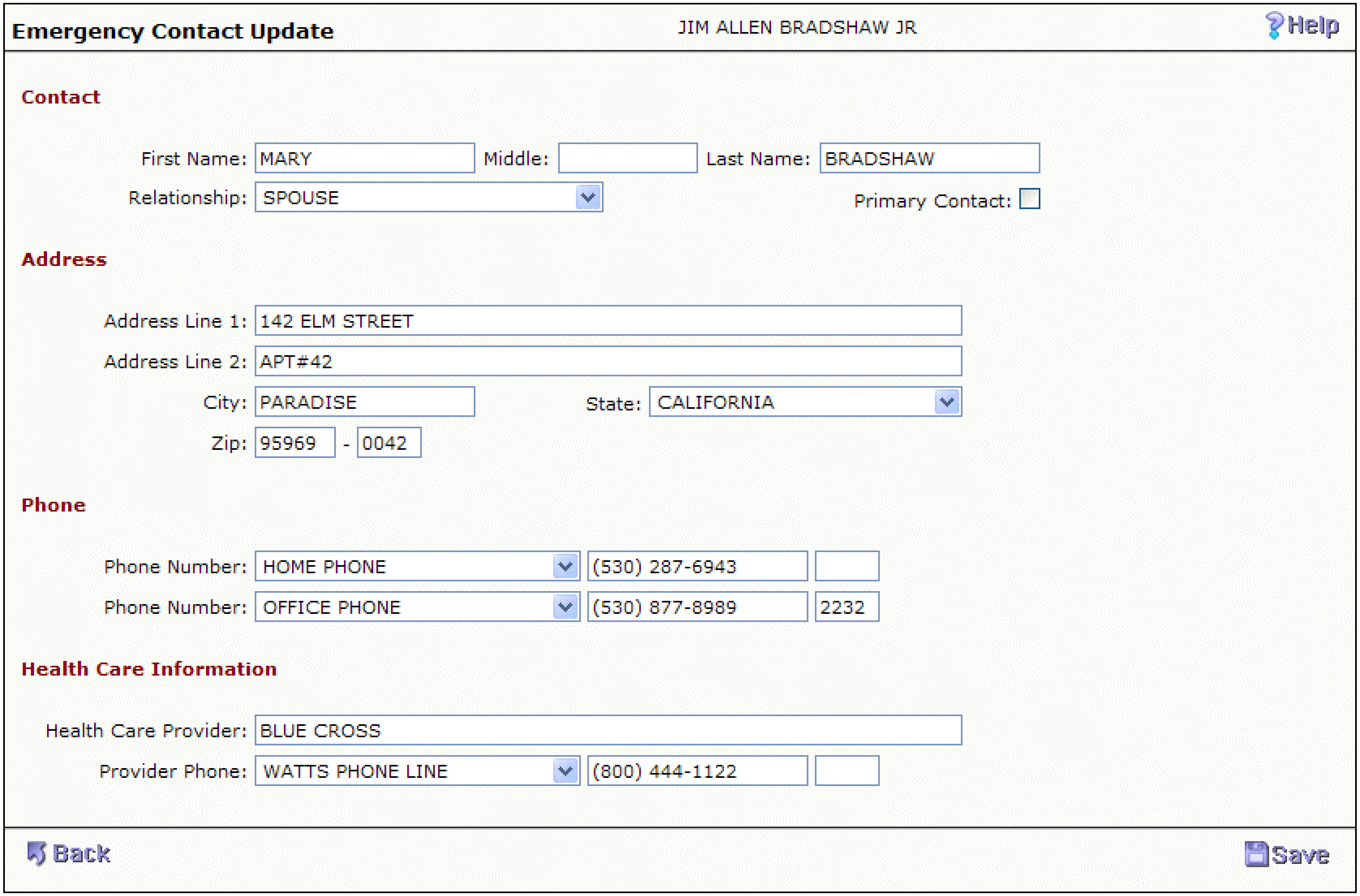
This screen maps to the hr_emerinfo table, visible in HREMPR (Emergency Tab). From here, employees may establish or update those people to be contacted in the event of an emergency. The Emergency Contacts list displays all of the emergency contacts for the employee. The primary emergency contact is labeled as (PRIMARY). From here, an employee may add, edit, or delete emergency contacts.

Emergency Contacts JIM ALLEN BRADSHAW JR Help

Name	Relationship	Phone 1	Phone 2	
MARY BRADSHAW	SPOUSE	(530) 287-6943	(530) 877-8989	Delete
NICK GARVIN	FRIEND	(530) 228-1209	(530) 342-1285	Delete
HENRIETTA BRADSHAW (PRIMARY)	MOTHER	(530) 228-2921	(530) 345-4563	Delete

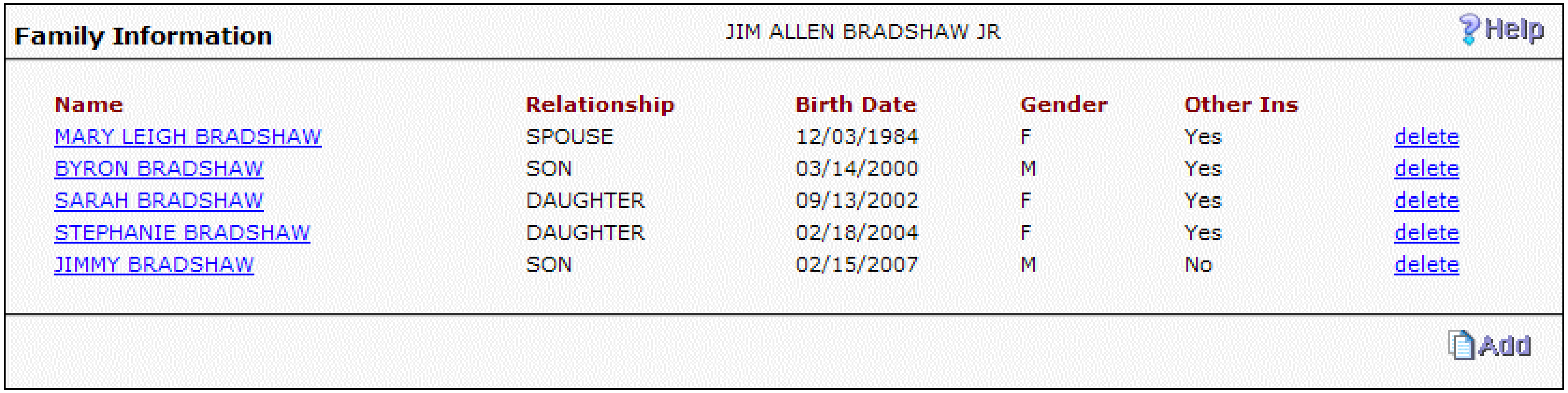
Add

The Emergency Contact Add/Update screen allows the employee to add or update information related to the employee's emergency contacts, including health care information.



2.5 Family Information

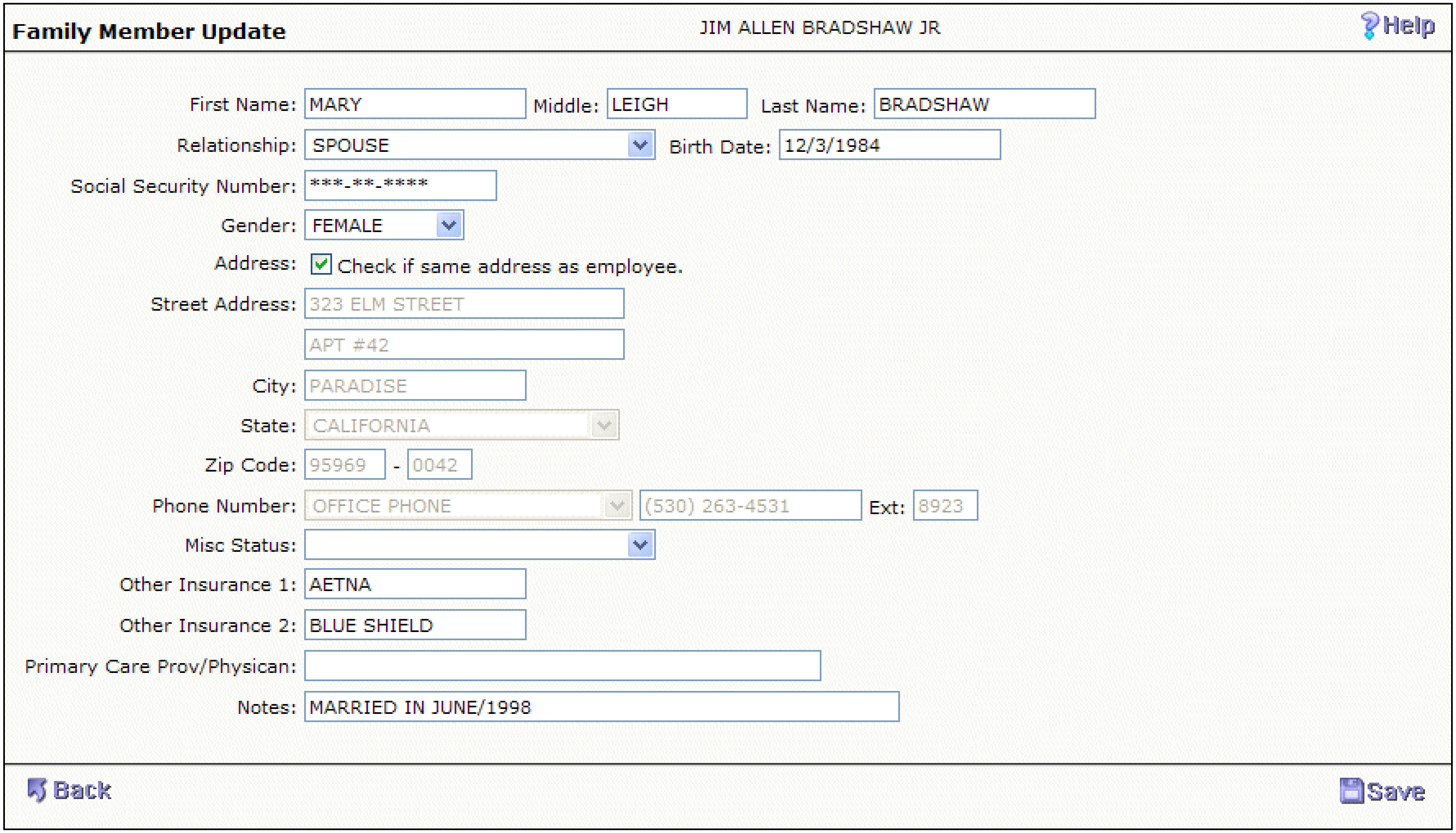
This screen maps to the hr_family table, visible in HRPYBE (Family tab). From here, employees may establish or update family member information for an employee.


Family Information JIM ALLEN BRADSHAW JR Help

Name	Relationship	Birth Date	Gender	Other Ins	
MARY LEIGH BRADSHAW	SPOUSE	12/03/1984	F	Yes	delete
BYRON BRADSHAW	SON	03/14/2000	M	Yes	delete
SARAH BRADSHAW	DAUGHTER	09/13/2002	F	Yes	delete
STEPHANIE BRADSHAW	DAUGHTER	02/18/2004	F	Yes	delete
JIMMY BRADSHAW	SON	02/15/2007	M	No	delete

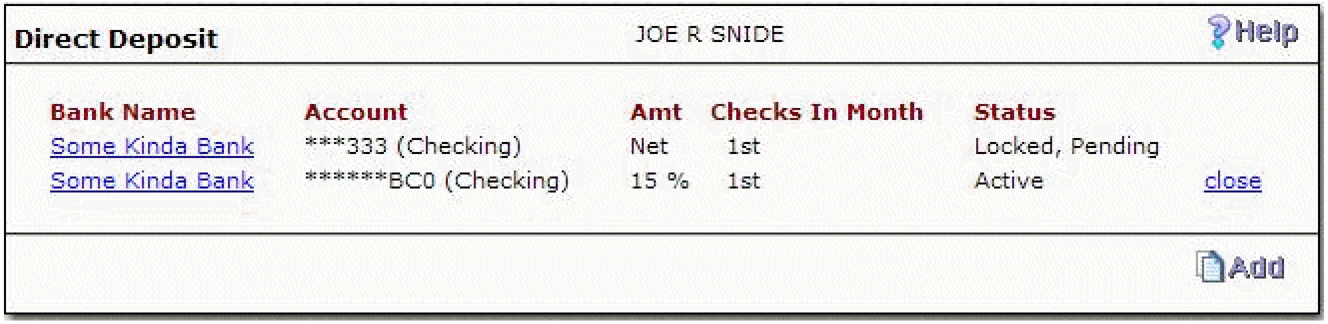
Add

The Family Information list displays all of the family members for the employee. An employee may add, edit, or delete family members from their personal information. The Family Member Add/Update screen allows the employee to add or update information related to the employee's family members, including insurance information.

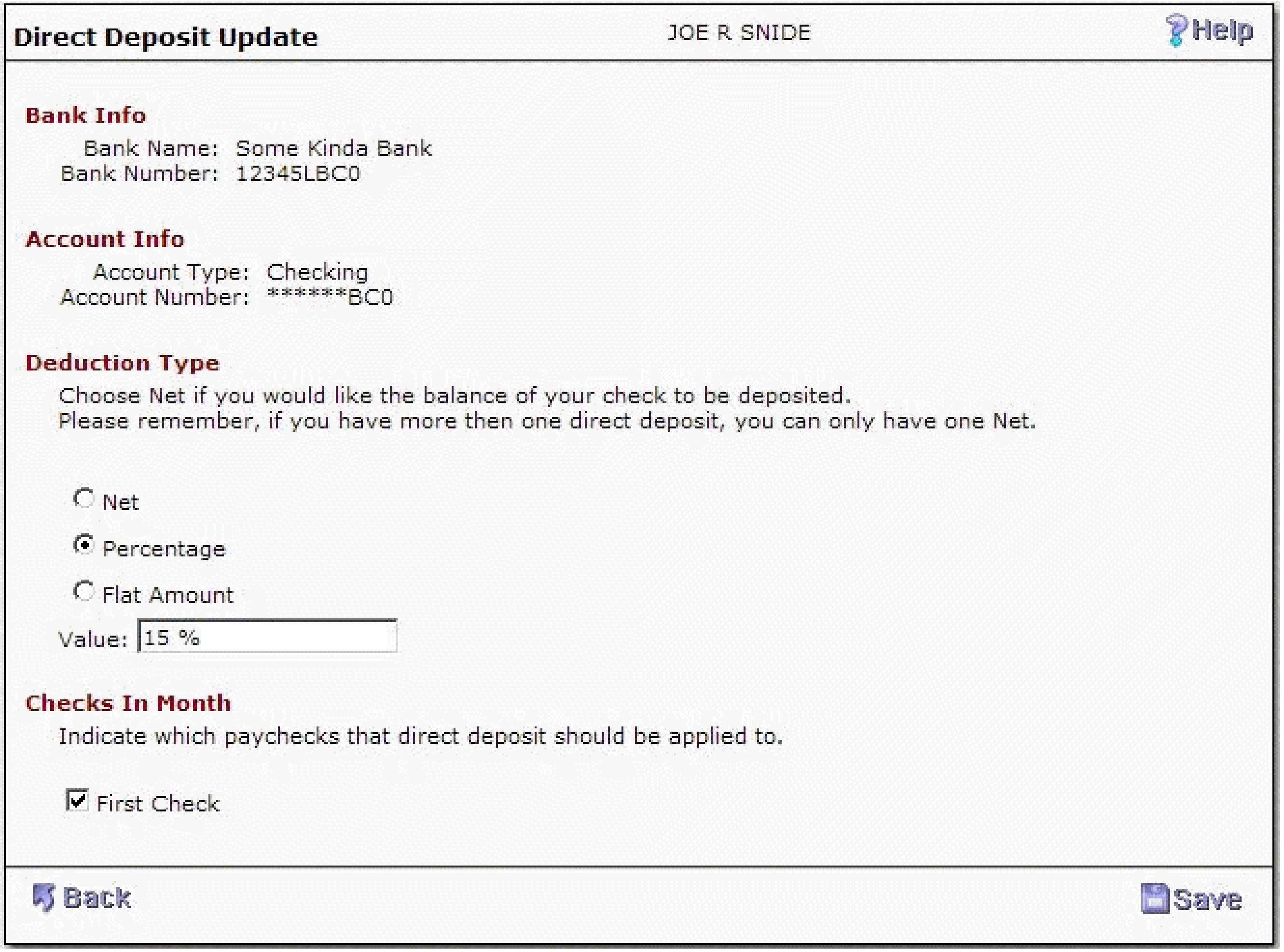


2.6 Pay Information

This area contains links related to paychecks. The Direct Deposit page maps data from the hr_dirdep table in the database, visible on the Direct Deposit tab of HRPYCA. It allows the user to specify details for directly depositing all or part of their paycheck with a bank. This screen requires a bank number and account.



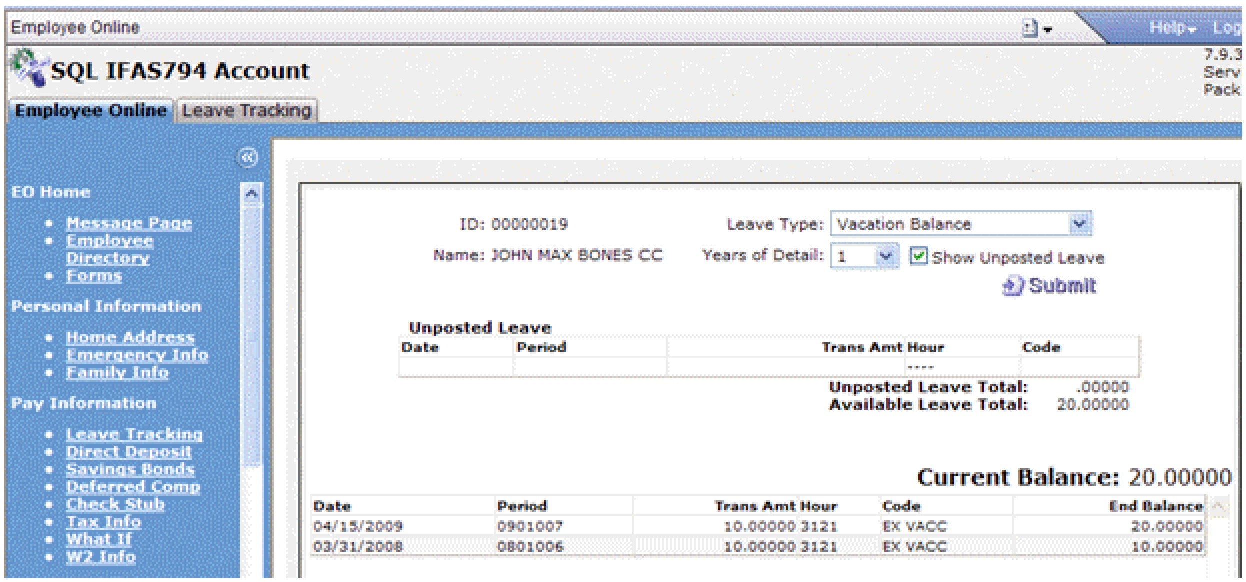
The user can specify a flat amount or a percentage of each check to be deposited into one or more specific accounts. The calc codes related to Direct Deposit may need to be adjusted depending on how a site handles these types of deductions.



2.7 Leave Tracking

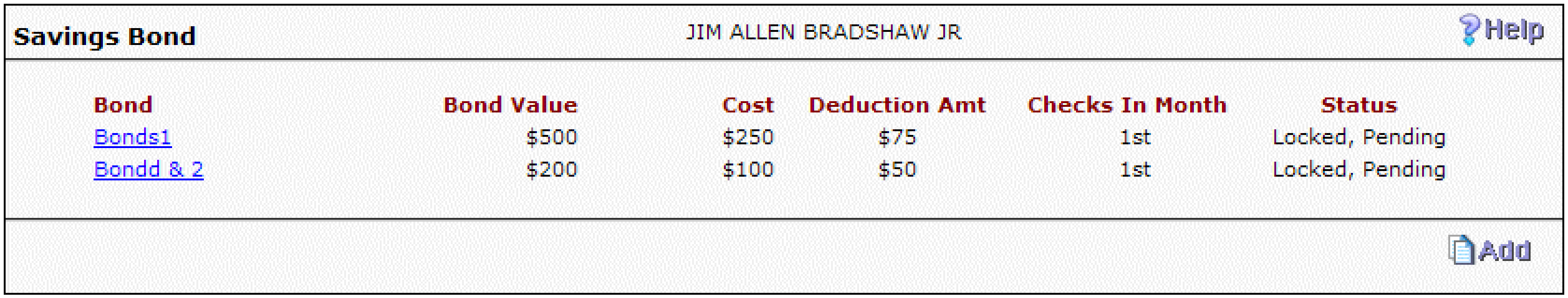
The Leave tracking screen gives easy access to the accrued leave information for the employee. It is available as a separate tab and can also be set up as a link "Pay Information". The left pane displays employee entity which is only available to a user who has the associations of "Timekeep" and "Finance". A regular EO user will view only their leave details. The leave type information comes from special hour bases that are configured using the PYHB common codes. A user can view their current leave balances upon selecting their leave type and then submitting to view the details. The balance is from the employee's PY Accumulator record.

Unposted Leave can also be displayed if common code EOCD/LEAVE is set up. Options for viewing include S(how), O(ptional) and H(ide). The screen shot below is with the "O" option set on the common code.



2.8 Savings Bonds

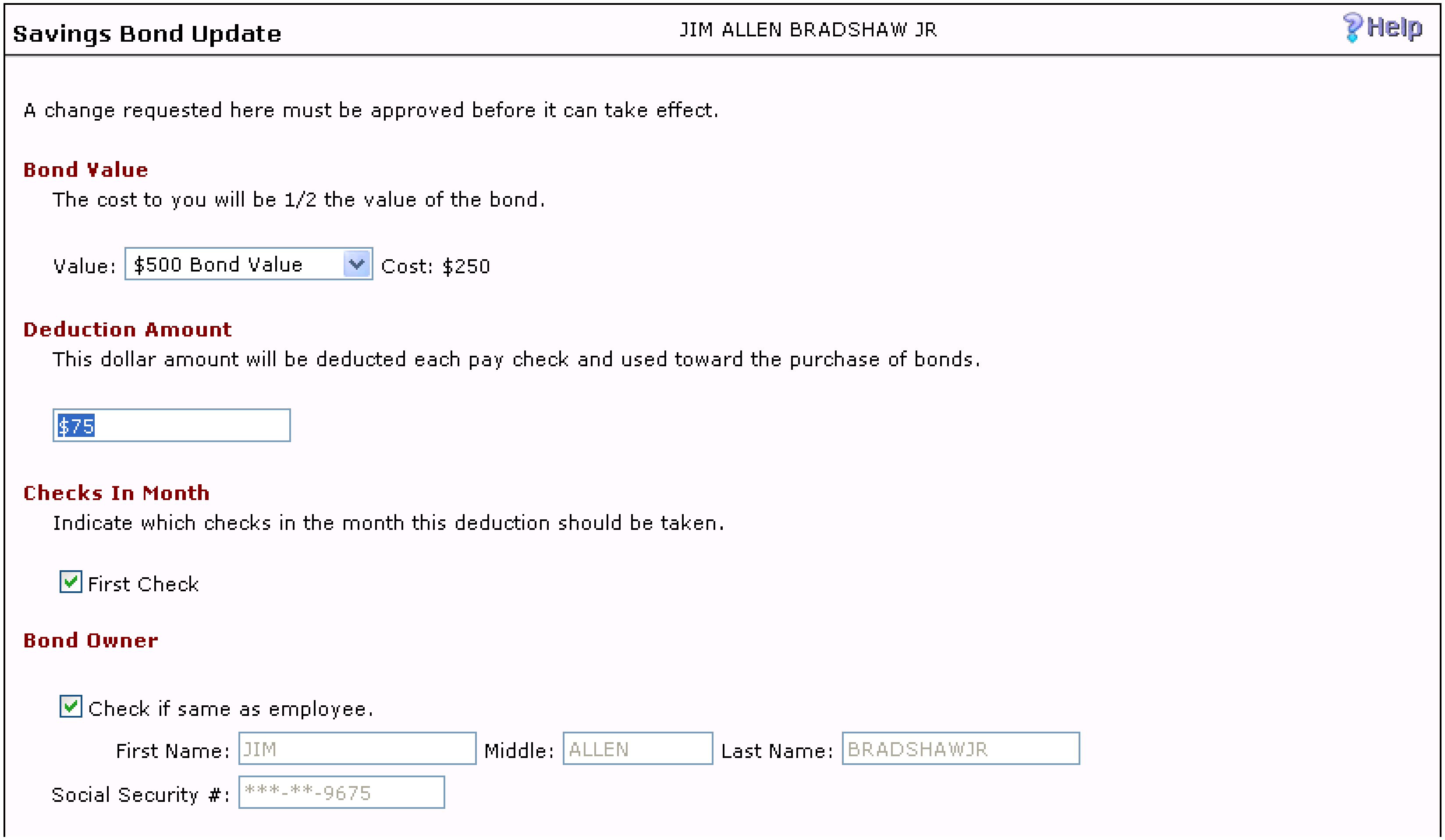
This page maps data from the hr_bonds table in the database, visible in HRPYCA - Bonds Tab. Request the start of a savings bond deduction or request a change in the amount to be deducted from each check for an existing bond.



Savings Bond JIM ALLEN BRADSHAW JR Help

Bond	Bond Value	Cost	Deduction Amt	Checks In Month	Status
Bonds1	$500	$250	$75	1st	Locked, Pending
Bondd & 2	$200	$100	$50	1st	Locked, Pending

Add



Savings Bond Update JIM ALLEN BRADSHAW JR Help

A change requested here must be approved before it can take effect.

Bond Value

The cost to you will be 1/2 the value of the bond.

Value: $500 Bond Value Cost: $250

Deduction Amount

This dollar amount will be deducted each pay check and used toward the purchase of bonds.

$75

Checks In Month

Indicate which checks in the month this deduction should be taken.

- [x] First Check

Bond Owner

- [x] Check if same as employee.

First Name: JIM Middle: ALLEN Last Name: BRADSHAWJR

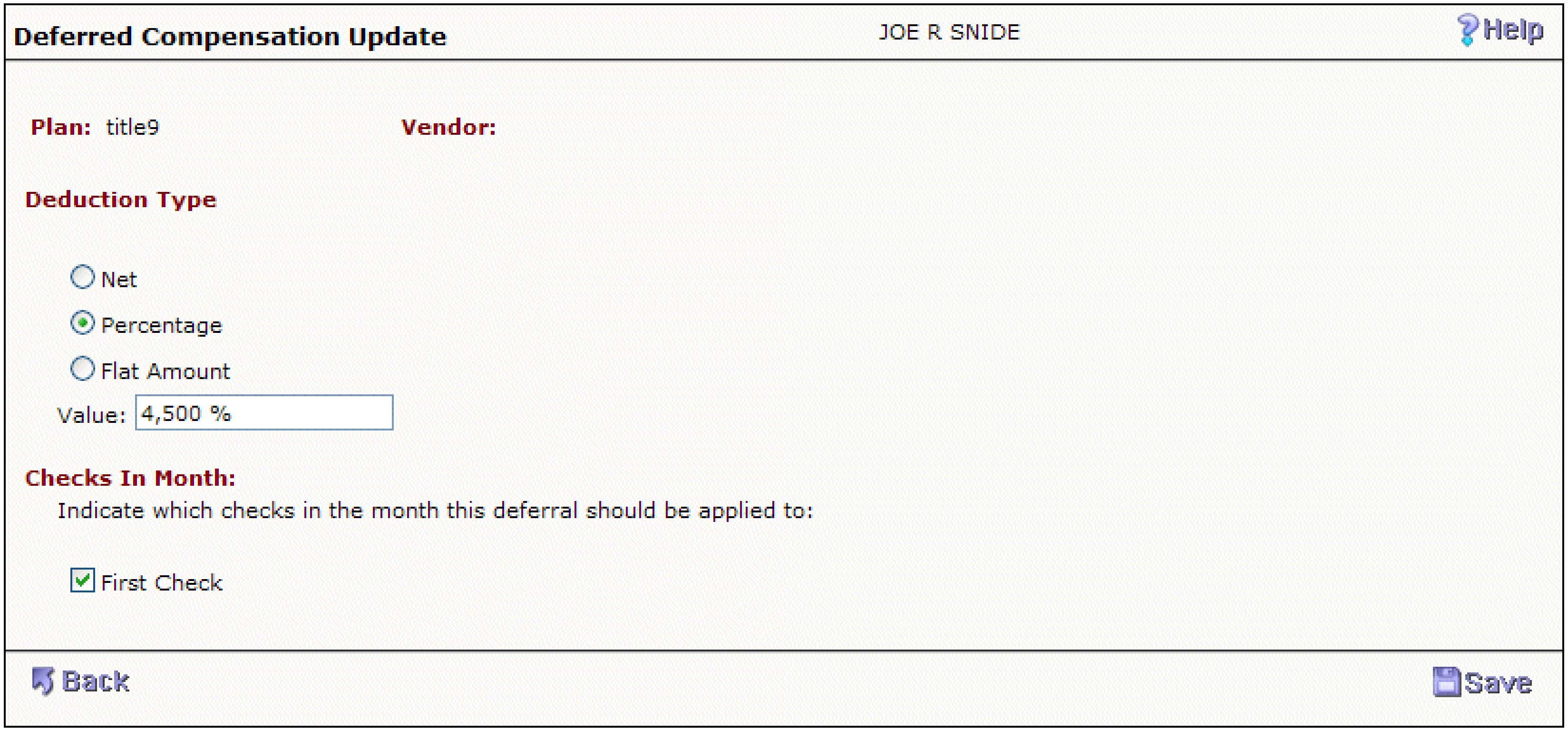
Social Security #: ***-**-9675

2.9 Deferred Compensation

This page maps data from the hr_tsainfo table in the database, visible in HRPY - Tax Sheltered Annuity tab. There are typically eligibility requirements for these types of deductions and for this reason this screen does not allow Add mode. Common deferred compensation types include 457 and 401K savings plans.

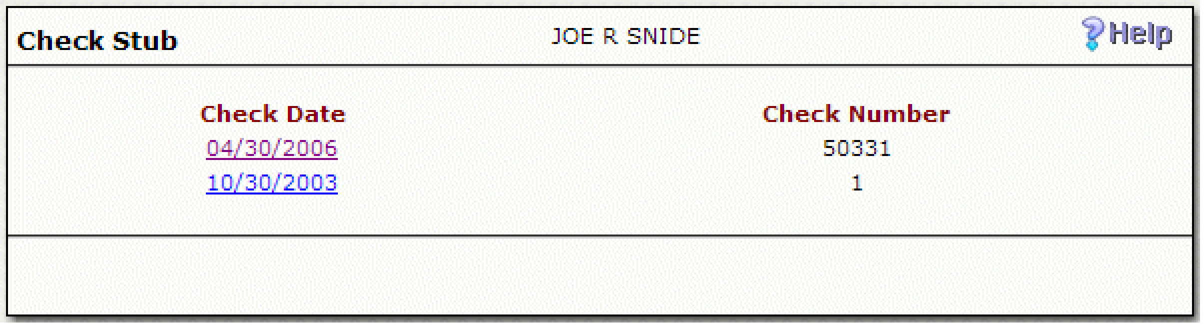
Deferred Compensation JOE R SNIDE Help

Plan	Vendor	Amt	Checks In Month	Status
Federal Income Tax	KAISER	$45	1st	Locked, Pending
CALIF SIT	KAISER	$0	1st	Active
title9		$44	1st	Locked, Pending
Social Security Tax		$0	1st	Active
title9		4,500 %	1st	Active
CA State Dis. Ins		$0	1st	Active
Worker's Comp		$0	1st	Active
COBRA Medical		$0	1st	Active
Social Security Tax		$0	1st	Active
Dental Insurance		$0	1st	Active
CA SUI		$0	1st	Active
New Jersey SIT		$0	1st	Active
Bonds1		$500	1st	Active


Deferred Compensation Update
JOE R SNIDE
Help
Plan: title9
Vendor:
Deduction Type
Net
Percentage
Flat Amount
Value: 4,500 %
Checks In Month:
Indicate which checks in the month this deferral should be applied to:
First Check
Back
Save

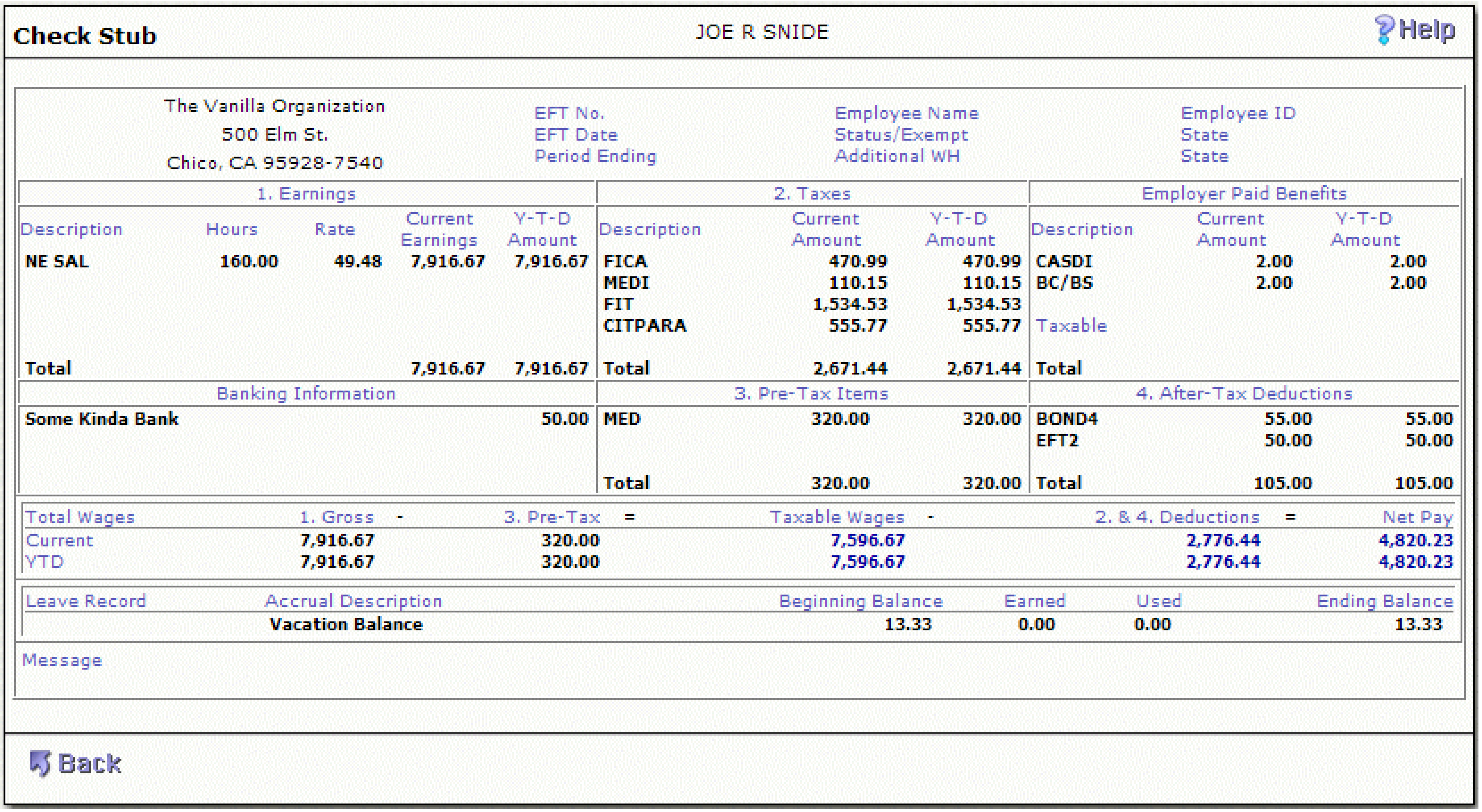
2.10 Check Stub

This link allows employees to view past pay check stubs online. The details used to build this page are derived from the hr_eostub table in the database and are visible in HREOTR - EO Employee Info, Check Stub Info tab. To populate the hr_eostub table the Check Writer and EFT Writer programs will need to be modified.



2.11EO_Stub

A ticket must be submitted to order the EO_stub. This should be ordered when the ELF forms are ordered. The Check Stub view page needs to be built to match the check stub layout for each particular site.



Check Stub JOE R SNIDE ? Help

The Vanilla Organization
500 Elm St.
Chico, CA 95928-7540

EFT No.
EFT Date
Period Ending

Employee Name
Status/Exempt
Additional WH

Employee ID
State
State

1. Earnings					2. Taxes			Employer Paid Benefits		
Description	Hours	Rate	Current Earnings	Y-T-D Amount	Description	Current Amount	Y-T-D Amount	Description	Current Amount	Y-T-D Amount
NE SAL	160.00	49.48	7,916.67	7,916.67	FICA	470.99	470.99	CASDI	2.00	2.00
					MEDI	110.15	110.15	BC/BS	2.00	2.00
					FIT	1,534.53	1,534.53			
					CITPARA	555.77	555.77	Taxable		
Total			7,916.67	7,916.67	Total	2,671.44	2,671.44	Total		

Banking Information		3. Pre-Tax Items			4. After-Tax Deductions		
Some Kinda Bank	50.00	MED	320.00	320.00	BOND4	55.00	55.00
					EFT2	50.00	50.00
		Total	320.00	320.00	Total	105.00	105.00

Total Wages	1. Gross -	3. Pre-Tax =	Taxable Wages -	2. & 4. Deductions =	Net Pay
Current	7,916.67	320.00	7,596.67	2,776.44	4,820.23
YTD	7,916.67	320.00	7,596.67	2,776.44	4,820.23

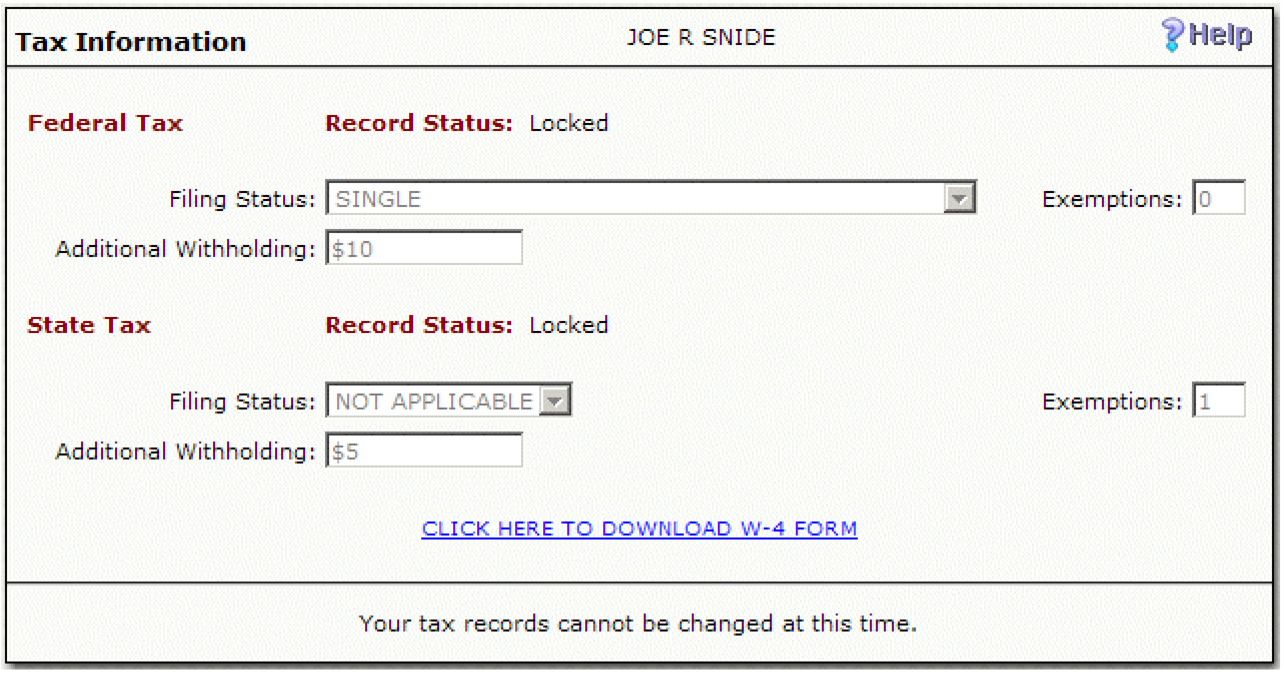
Leave Record	Accrual Description	Beginning Balance	Earned	Used	Ending Balance
	Vacation Balance	13.33	0.00	0.00	13.33

Message

Back

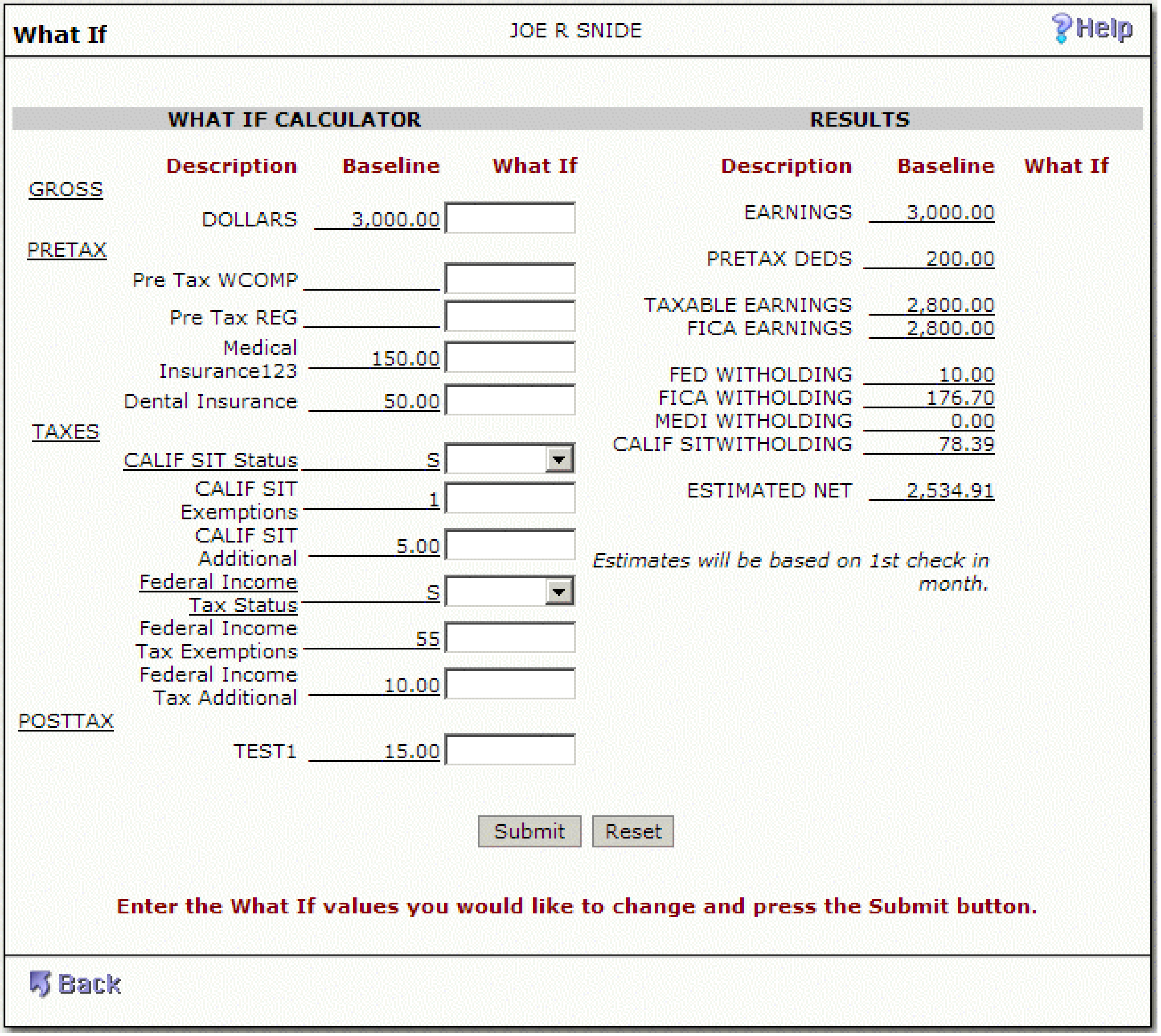
2.12 Tax Information

This page maps data from the hr_mandded table in the database on the HRPYMD Primary Taxes Tab. It allows the user to view and update both Federal and State tax filing status. It also allows for adjustments to the number of declared dependents and additional withholding amounts.



2.13What If

This is a tool that allows employees to see how different deductions and allowances may affect take home pay. What If is not intended to reproduce an exact check amounts, but give an estimate the take home pay changing base pay when pre-tax, after-tax deductions or federal and state tax status changes are made.



What If JOE R SNIDE Help

WHAT IF CALCULATOR

	Description	Baseline	What If
GROSS			
	DOLLARS	3,000.00	
PRETAX			
	Pre Tax WCOMP		
	Pre Tax REG		
	Medical Insurance123	150.00	
	Dental Insurance	50.00	
TAXES			
	CALIF SIT Status	S	
	CALIF SIT Exemptions	1	
	CALIF SIT Additional	5.00	
	Federal Income Tax Status	S	
	Federal Income Tax Exemptions	55	
	Federal Income Tax Additional	10.00	
POSTTAX			
	TEST1	15.00	

RESULTS

Description	Baseline	What If
EARNINGS	3,000.00	
PRETAX DEDS	200.00	
TAXABLE EARNINGS	2,800.00	
FICA EARNINGS	2,800.00	
FED WITHOLDING	10.00	
FICA WITHOLDING	176.70	
MEDI WITHOLDING	0.00	
CALIF SITWITHOLDING	78.39	
ESTIMATED NET	2,534.91	

Estimates will be based on 1st check in month.

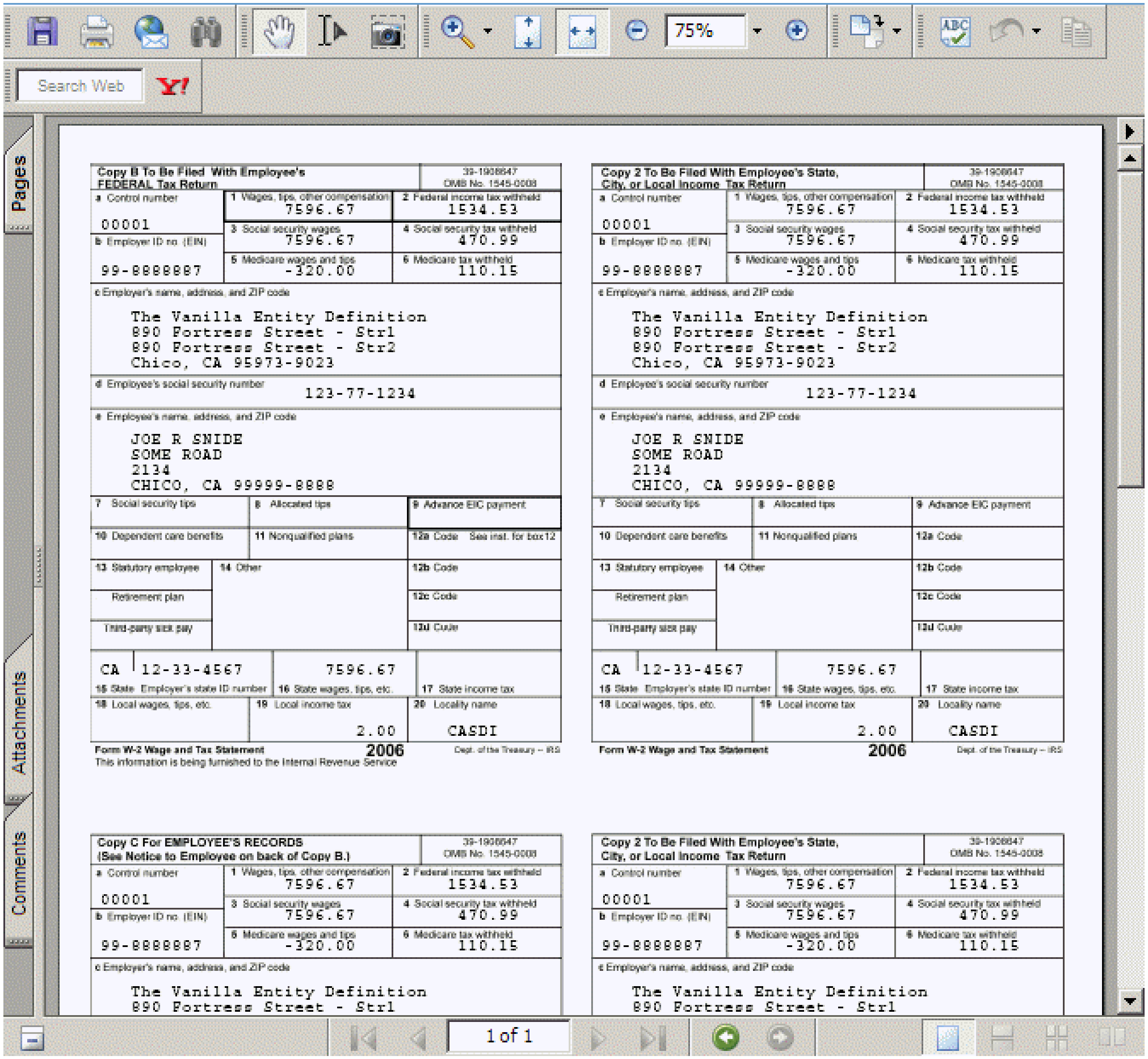
Submit Reset

Enter the What If values you would like to change and press the Submit button.

Back

2.14W-2 Information

EO allows for one W-2 per employee per year. W-2 data is generated when the W-2 process (PYW2PW) is run. For W-2 data to be properly generated, the employee must have Employee Accumulator data (PYUPEA). The Employee Accumulator data is created when a pay check is calculated and/or paid. When the PYW2PW process is run, a workflow model is triggered. The workflow model utilizes a specified W-2 form and overlay the W2 data onto it and then store this data on a PDF file within Documents Online. An attachment definition must to be setup that links the W-2 from Document Online to EO's W-2 screen for the user to access. See W-2 Workflow setup section.



Copy B To Be Filed With Employee's FEDERAL Tax Return
39-1908647
OMB No. 1545-0008

a Control number 00001	1 Wages, tips, other compensation 7596.67	2 Federal income tax withheld 1534.53
b Employer ID no. (EIN) 99-8888887	3 Social security wages 7596.67	4 Social security tax withheld 470.99
	5 Medicare wages and tips -320.00	6 Medicare tax withheld 110.15

c Employer's name, address, and ZIP code
The Vanilla Entity Definition
890 Fortress Street - Str1
890 Fortress Street - Str2
Chico, CA 95973-9023

d Employee's social security number 123-77-1234

e Employee's name, address, and ZIP code
JOE R SNIDE
SOME ROAD
2134
CHICO, CA 99999-8888

7 Social security tips	8 Allocated tips	9 Advance EIC payment
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12
13 Statutory employee	14 Other	12b Code
Retirement plan		12c Code
Third-party sick pay		12d Code

15 State CA Employer's state ID number 12-33-4567	16 State wages, tips, etc. 7596.67	17 State income tax
18 Local wages, tips, etc.	19 Local income tax 2.00	20 Locality name CASDI

Form W-2 Wage and Tax Statement 2006 Dept. of the Treasury – IRS
This information is being furnished to the Internal Revenue Service

Copy 2 To Be Filed With Employee's State, City, or Local Income Tax Return
39-1908647
OMB No. 1545-0008

a Control number 00001	1 Wages, tips, other compensation 7596.67	2 Federal income tax withheld 1534.53
b Employer ID no. (EIN) 99-8888887	3 Social security wages 7596.67	4 Social security tax withheld 470.99
	5 Medicare wages and tips -320.00	6 Medicare tax withheld 110.15

c Employer's name, address, and ZIP code
The Vanilla Entity Definition
890 Fortress Street - Str1
890 Fortress Street - Str2
Chico, CA 95973-9023

d Employee's social security number 123-77-1234

e Employee's name, address, and ZIP code
JOE R SNIDE
SOME ROAD
2134
CHICO, CA 99999-8888

7 Social security tips	8 Allocated tips	9 Advance EIC payment
10 Dependent care benefits	11 Nonqualified plans	12a Code
13 Statutory employee	14 Other	12b Code
Retirement plan		12c Code
Third-party sick pay		12d Code

15 State CA Employer's state ID number 12-33-4567	16 State wages, tips, etc. 7596.67	17 State income tax
18 Local wages, tips, etc.	19 Local income tax 2.00	20 Locality name CASDI

Form W-2 Wage and Tax Statement 2006 Dept. of the Treasury – IRS

Copy C For EMPLOYEE'S RECORDS (See Notice to Employee on back of Copy B.)
39-1908647
OMB No. 1545-0008

a Control number 00001	1 Wages, tips, other compensation 7596.67	2 Federal income tax withheld 1534.53
b Employer ID no. (EIN) 99-8888887	3 Social security wages 7596.67	4 Social security tax withheld 470.99
	5 Medicare wages and tips -320.00	6 Medicare tax withheld 110.15

c Employer's name, address, and ZIP code
The Vanilla Entity Definition
890 Fortress Street - Str1

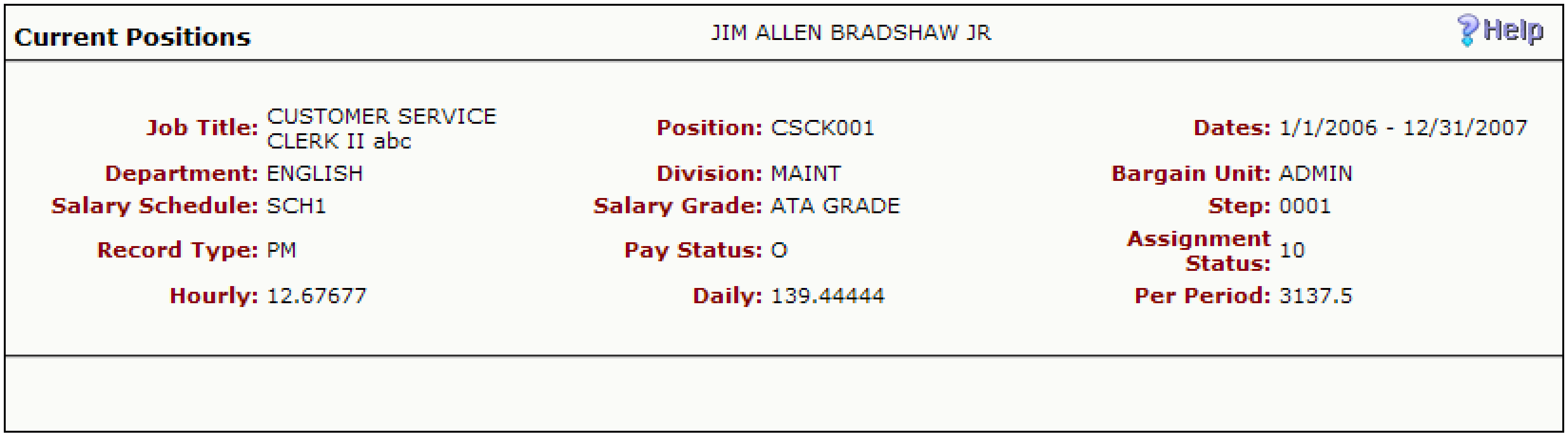
Copy 2 To Be Filed With Employee's State, City, or Local Income Tax Return
39-1908647
OMB No. 1545-0008

a Control number 00001	1 Wages, tips, other compensation 7596.67	2 Federal income tax withheld 1534.53
b Employer ID no. (EIN) 99-8888887	3 Social security wages 7596.67	4 Social security tax withheld 470.99
	5 Medicare wages and tips -320.00	6 Medicare tax withheld 110.15

c Employer's name, address, and ZIP code
The Vanilla Entity Definition
890 Fortress Street - Str1

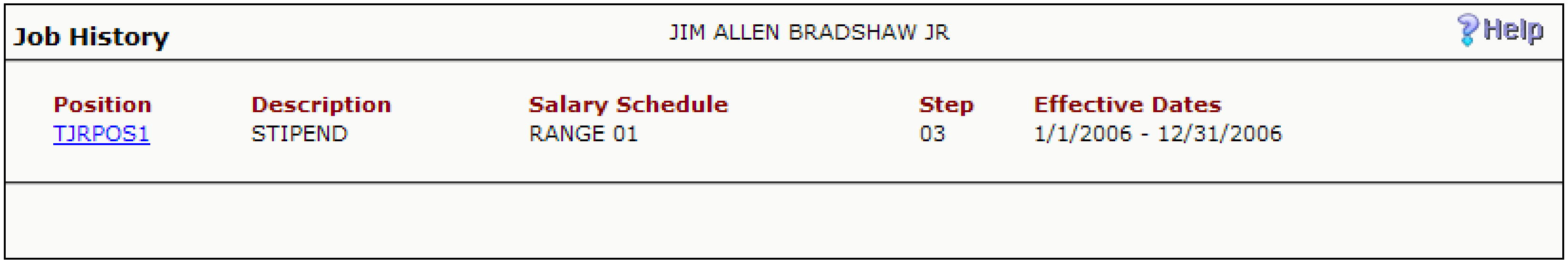
2.15 Job Information

This area contains different categories of information related to jobs and education. The Current Position screen displays information related to present job positions, visible in 7i as HRPYPA or HRPYQP. The Current Job screen maps to the hr_emppay, hr_pcntble and hr_slrytble tables in the database. It shows jobs that are currently active.



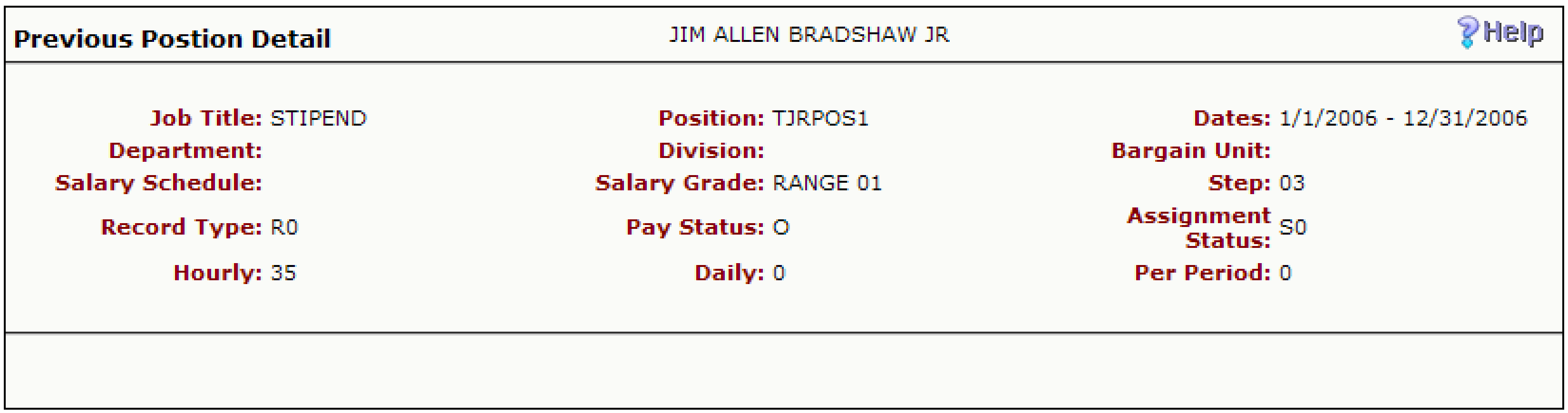
2.16 Historical Positions

This screen displays job history from HRPYPA or HRPYQP. The Historical Jobs screen maps to the hr_emppay, hr_pcntble and hr_slrytble tables in the database and displays jobs the employee held in the past.



Job History JIM ALLEN BRADSHAW JR Help

Position	Description	Salary Schedule	Step	Effective Dates
TJRPOS1	STIPEND	RANGE 01	03	1/1/2006 - 12/31/2006



Previous Postion Detail JIM ALLEN BRADSHAW JR Help

Job Title:	STIPEND	Position:	TJRPOS1	Dates:	1/1/2006 - 12/31/2006
Department:		Division:		Bargain Unit:	
Salary Schedule:		Salary Grade:	RANGE 01	Step:	03
Record Type:	R0	Pay Status:	O	Assignment Status:	S0
Hourly:	35	Daily:	0	Per Period:	0

2.17 License and Certification Information

This link displays all licenses and certifications shown in HREMES License/Certifications Tab. The License/Cert screen maps to the hr_tuition and hr_hrcode tables in the database.

License/Certification Info JIM ALLEN BRADSHAW JR Help

License or Certification	Expiration
EMT CERTIFICATE	11/27/2008
D-4 DRIVER	02/09/1997
CPR CERTIFICATE	

2.18 Skills

This link displays skills related to education and experience shown in HREMES/Skills tab. The Skills tab maps to the hr_empskill and hr_hrcode tables in the database.

Skills Info JIM ALLEN BRADSHAW JR Help

Skill Description	Educational Source	Experience Source	Comments
CASHERING			BURGER HUT
LANGUAGE			FLUENT IN FRENCH
LIBRARY EXP.			AZ STATE U. INTER-LIBRARY LOAN
SPANISH SPEAKNG			

2.19 Courses

This link displays educational courses taken along with their associated unit amount shown in HREMES/Course Units tab. The Courses tab maps to the hr_crseunit table in the database.

Course Info JIM ALLEN BRADSHAW JR Help

Course Title	Institution	Date Completed	Units
GENERIC CRSU	INSTITUTE	9/1/2001	5.00
	UNIV. OF CALIFORNIA @ BERKELEY	04/03/2005	2.00

2.20 Tuition

This link displays educational courses taken along with their associated costs shown in HREMES/Tuition tab. The Tuition tab maps to the hr_tuition and hr_hrcode tables in the database.

Tuition Info JIM ALLEN BRADSHAW JR Help

Course Title	Institution	Date Completed	Cost
HOW TO FIND BARGAINS ON EBAY	WHITMAN COLLEGE	12/22/2005	$0.00
GENERIC TRAINING	CHICO STATE	12/02/2000	$0.00

2.21 Education

This link displays education history shown in HREMES/General tab. The Education screen maps to the hr_educinfo and hr_hrcode tables in the database.

Education Info JIM ALLEN BRADSHAW JR ? Help

Institutional Description	Graduation	Degree	Major
CSU, CHICO	06/18/1998	BACHELOR ARTS	ENGLISH
ARIZONA STATE UNIVERSITY	05/11/1995	ASSOCIATE ARTS	ENGLISH

2.22 Training

This link displays training history shown in HREMES/Training tab. The Training tab maps to the hr_emptrain and hr_hrcode tables in the database.

Training Info JIM ALLEN BRADSHAW JR ? Help

Institution	Course	Date	Units
SUSAN FRANKLIN	COMM. SKILLS	6/8/2006	25
BOWEN SMITH	FIRST AID TRAIN	3/30/2004	45

2.23 Benefits

This screen allows a user to view and modify Benefit records. As setup varies, some of the items described here may not be in use at each site and will not be visible on the site map. Benefit functionality in Employee Online requires substantial setup, described in the Administration Benefit Requests section below.

2.24 Benefit Request

Benefit requests are recorded in the HREOTR Screen, Request Info Tab which maps to the hr_trnsreq and hr_trnsdtl tables in the database. Approvals of the benefit requests affect benefit records visible in the HRPYBE Benefit Assignments Tab or the HRPYCA Miscellaneous Tab. These records map to the hr_beneinfo and hr_cdhassgn tables in the database. Additionally, a Benefit request may also affect the information on the HRPYBE Dependent Beneficiaries Tab which maps the hr_depdbenf table in the database. Benefits are organized into the following Groups: Insurance, Reimbursements, Retirement, and Other.

2.24.1 Benefit Grouping

Insurance: Navigate to those Benefits defined with the INS Group. Typically, includes basic coverage such as Medical, Dental, Vision, and Supplemental Life.

Reimbursement: Contains the records associated with Medical Flex or Dependent Care plans.

Retirement: Contains information related to certain retirement benefits.

Other Benefits: Intended for those items that do not fit into any of the previous three categories.

Insurance

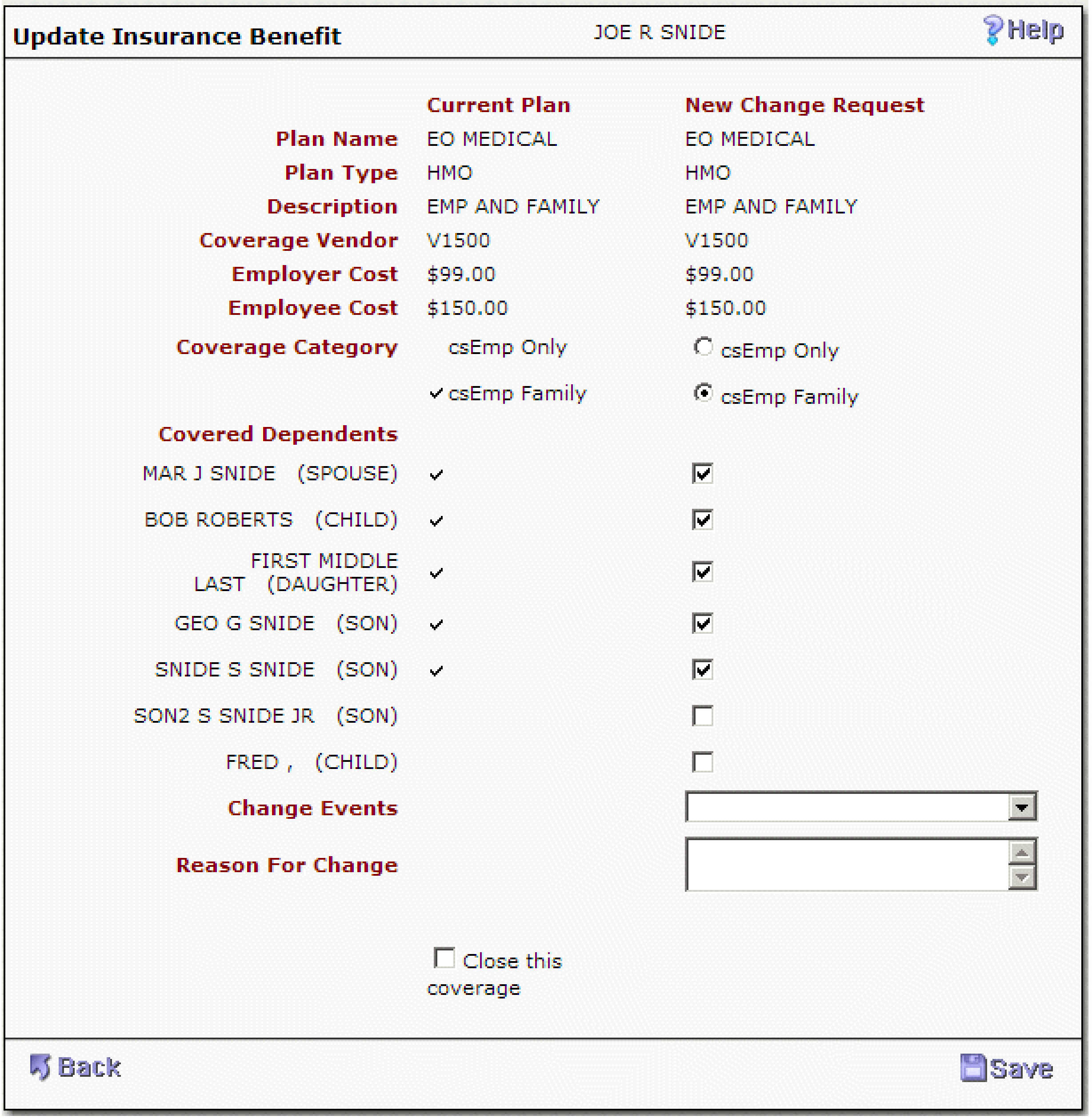
Navigate to those Benefits defined with the INS Group. Typically, this includes basic coverage such as Medical, Dental, Vision, and Supplemental Life. The user is first presented with a list of present or possible coverage.

Insurance Benefits JOE R SNIDE Help

Coverage Type	Plan Name	Covered Individuals	Coverage Amt	Status
MEDICAL	EO MEDICAL	csEmp Family	n/a	Active
DENTAL	DENTAL NO TYPE	csFamily	n/a	Pending Close

Choose Insurance Benefit JOE R SNIDE Help

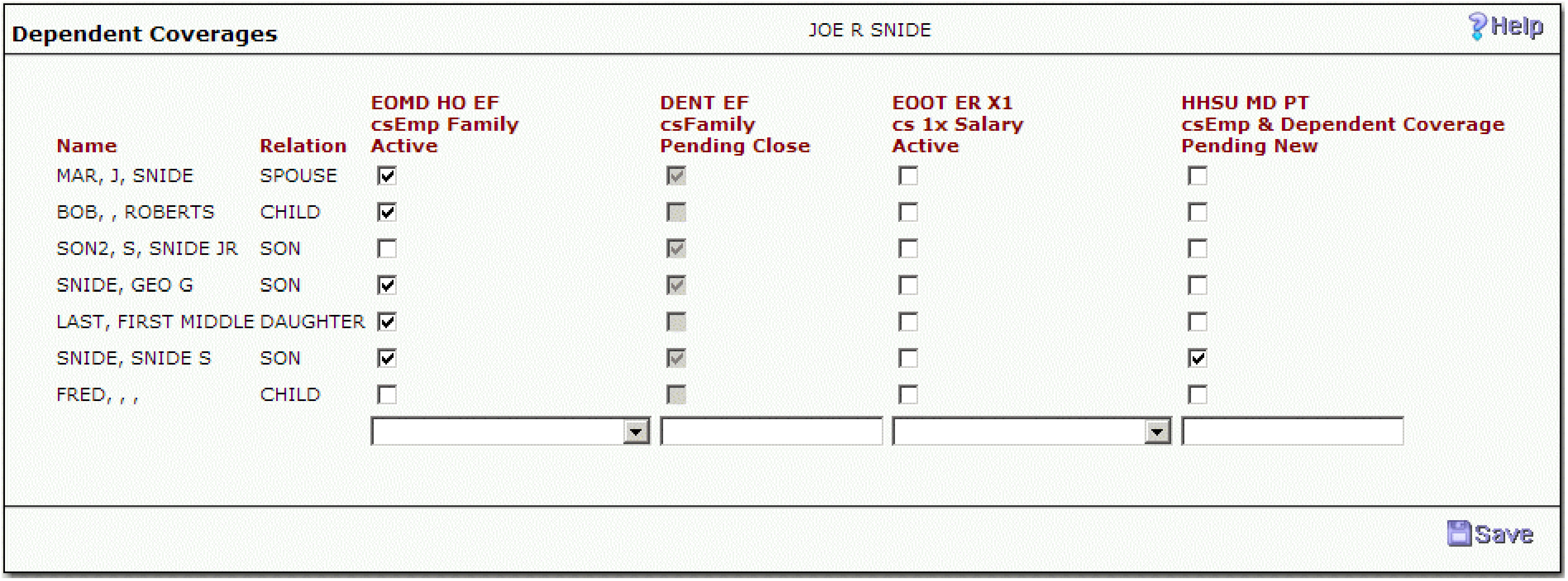
Plan Name	Plan Type	Restrictions
EO MEDICAL	HMO	This is your current plan. Mid year changes allowed under certain conditions. Open enrollment period: 02/01 - 02/28 Open enrollment period: 08/01 - 10/30
MEDICAL	MEDICAL	Mid year changes allowed under certain conditions. Open enrollment period: 02/01 - 02/28 Open enrollment period: 08/01 - 10/31
BLUS SHIELD	n/a	Open enrollment period: 02/01 - 02/28 Open enrollment period: 08/01 - 10/31


Update Insurance Benefit
JOE R SNIDE
Help
Current Plan
New Change Request
Plan Name
EO MEDICAL
EO MEDICAL
Plan Type
HMO
HMO
Description
EMP AND FAMILY
EMP AND FAMILY
Coverage Vendor
V1500
V1500
Employer Cost
$99.00
$99.00
Employee Cost
$150.00
$150.00
Coverage Category
csEmp Only
csEmp Only
csEmp Family
csEmp Family
Covered Dependents
MAR J SNIDE (SPOUSE)
BOB ROBERTS (CHILD)
FIRST MIDDLE LAST (DAUGHTER)
GEO G SNIDE (SON)
SNIDE S SNIDE (SON)
SON2 S SNIDE JR (SON)
FRED , (CHILD)
Change Events
Reason For Change
Close this coverage
Back
Save

2.25 Dependent Coverage

Some insurance plans require covered dependents be explicitly listed. This page provides a view of all Benefits that are currently active for the Employee and that have been setup to be sensitive to which dependents are covered. It provides a view of data from the hr_depdbenf table in the database, visible on HRPYBE Dependent Beneficiaries Tab.

Changes on the Dependent Coverage's page are restricted to adding or removing a family member from coverage. The page is further restricted in that it does not allow a change in the coverage category for a benefit. For example if the user's coverage category is Employee Family, a new family member can be added. But if the employee's coverage is currently Employee Only then this screen will disallow the request to add the new family member. The reason for this is that change in category request may entail change in costs to the Employee. The regular Benefit screens will show these cost details associated with a change in coverage and the Employee should make this kind on the regular Benefit page.



2.26 Term Life

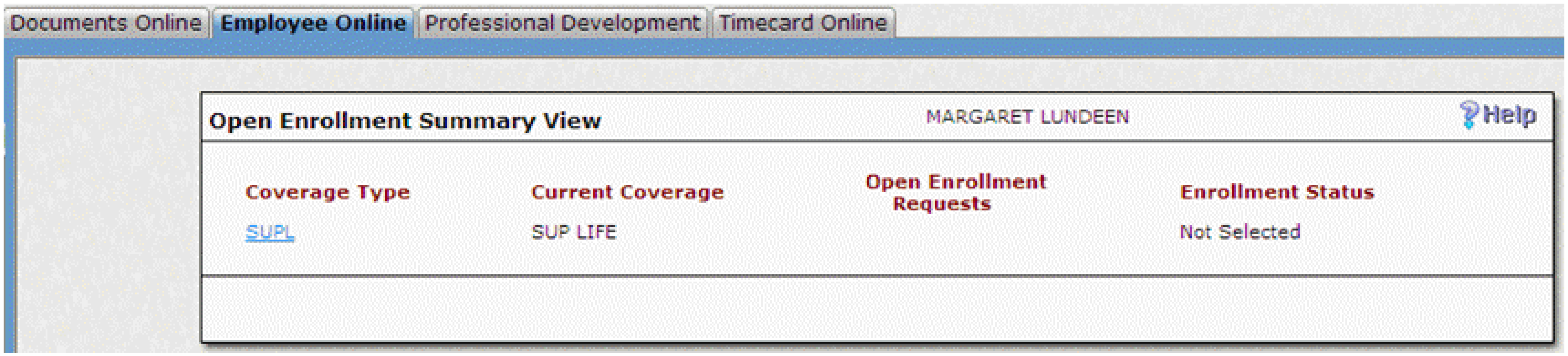
Relay information about term life coverage of dependents, visible in 7i as the HRPYBE Term Life Insurance Tab. This view maps the data in the hr_termlife table in the database.

Term Life Coverage JIM ALLEN BRADSHAW JR Help

Name	SSN	Coverage	Coverage Amount	Description
JIM ALLEN BRADSHAW JR	***-**-9675	Employee Lien		Coverage election is 1 times salary.
JIM ALLEN BRADSHAW JR	***-**-9675	Employee Lien		Coverage election is 1 times salary.
MARY LEIGH BRADSHAW	***-**-9865	Supplemental Life	$100,000.00	Coverage not to exceed $100,000.
BYRON BRADSHAW	***-**-9841	Supplemental Life	$25,000.00	Coverage not to exceed $25,000.
SARAH BRADSHAW	***-**-0943	Supplemental Life	$25,000.00	Coverage not to exceed $25,000.
STEPHANIE BRADSHAW	***-**-1454	Supplemental Life	$25,000.00	Coverage not to exceed $25,000.
JIMMY BRADSHAW	***-**-9675	Supplemental Life	$25,000.00	Coverage not to exceed $25,000.

2.27 Open Enrollment Menu

EO gives the option to create an open enrollment link that would only be visible during the open enrollment period of a benefit plan. An employee would have the option to view and select to add the plan from the link.



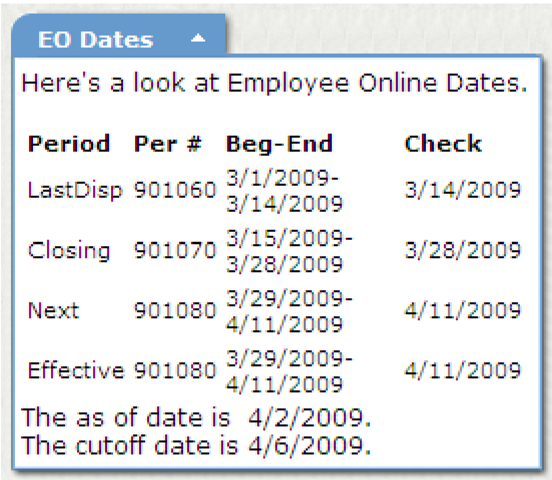
2.28 Employee Online Dates

Employee Online does not show begin and end dates to the employee when they make a change request. EO uses the date time value from the web server to understand the current date. Given the current date and the information from the common code PYPR CYCLExx described in the Common Code guide, EO is able to construct a timeline of standard period begin and end dates and place the appropriate dates on the request being made.

An occurrence of PYPR CYCLExx is set up for each payroll cycle in use at a site. Given the information in the common code, EO is able to figure out the Period Numbers of the standard periods for that pay cycle. The code also defines the cut off date for EO requests by the number placed in Assoc Code 01 which represents the number of days prior to the pay check when cut off will occur.

The important concept to convey to employees is that of the cutoff date for requests. Requests made prior to the cutoff will apply to one period. Requests made after the cutoff will apply to the next period. EO's default message of the day explicitly tells the user to which checks a request made now will apply.

There is a debug feature that is intended to help see how EO is oriented in the timeline of standard periods. In common code EOCD MASTER, Associated Code 1 can be set to SHOW DATES. Typically, this feature would only be turned on during training and implementation. This causes EO to print date related information on the Message of the day page. The period categories it displays are described below.



2.29 Getting Employee Online Started

Employee Online is driven by common codes, the benefits table, the EO master benefit table, and the Benefunc file. The benefit setup must maintain consistency between the HR benefit table, the EO benefit master table and the Benefunc file.

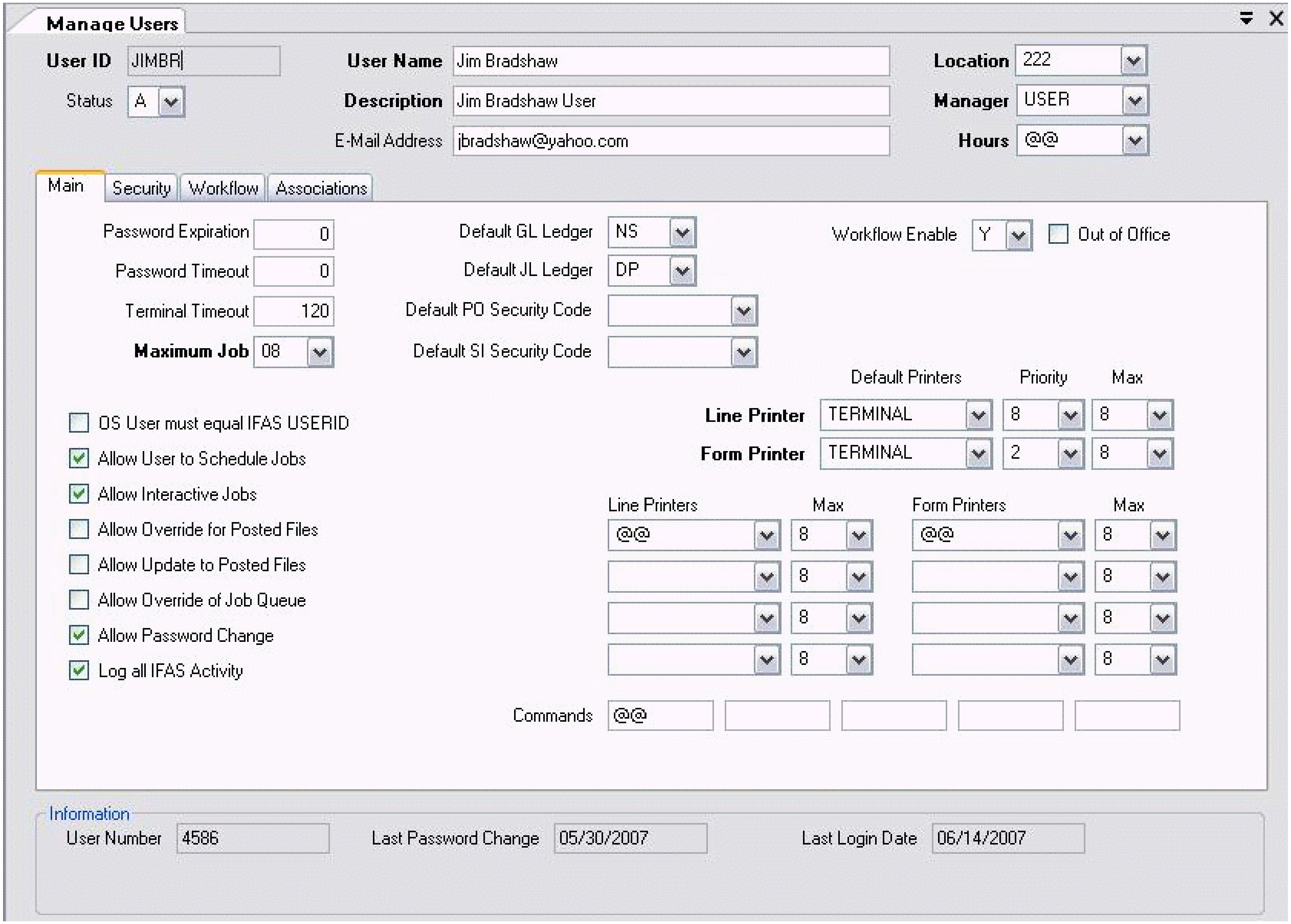
Required Common Codes – please refer to the common codes manual for further common code setup.

Code	Category	Purpose
NUAS	EMPLOYEE	Gives user security to access EO
NUAS	EOADMIN	Give the user administrator rights
EOCD	BENEFITS	Set restrictions on the benefit screen
EOCD	DEFCOMP	Set restrictions on the deferred com screen

EOCD	DEFCOMP2	Set further restrictions on the deferred comp screen
EOCD	DIRDEP	Set restrictions on the direct deposit screen
EOCD	DIRDEP2	Set further restrictions on direct deposit screen
EOCD	EMER	Set restrictions on the emergency screen
EOCD	EMPDIR	Set restrictions on the employee directory screen
EOCD	FAMILY	Set restrictions on the family screen
EOCD	MASTER	Set restrictions on the master screen
EOCD	MASTER2	Set further restrictions on the master screen
EOCD	PAYCHK	Set restrictions on the pay check screen
EOCD	PERSONAL	Set restrictions on the personal information screen
EOCD	SAVBONDS	Set restrictions on the bonds screen
EOCD	TAX	Set restrictions on the tax screen
EOCD	WHATIF	Runs a mini force calculation
PYPR	CYCLCxx	Defines the pay periods for the EO Dates
PYFG	PY911C	Deletes EO check stubs when payroll undo is run
PYFG	PY266C	Maintains the EO check stubs to match payroll actions
SYNO	TRNSID	Defines the EO transaction ID

2.30 Required User Security to Access EO

Access to Employee Online is granted via the existence of an Association named EMPLOYEE with the value being the Employee's ID. Administrative access is granted using an Association named EOADMIN again with a value of the Employee's ID. From here, an EO administrator may perform a variety of password/security maintenance tasks: force password change, reset password, lock account can be activated form the status field.


Manage Users
User ID JIMBR
Status A
User Name Jim Bradshaw
Description Jim Bradshaw User
E-Mail Address jbradshaw@yahoo.com
Location 222
Manager USER
Hours @@
Main
Security
Workflow
Associations
Password Expiration 0
Password Timeout 0
Terminal Timeout 120
Maximum Job 08
Default GL Ledger NS
Default JL Ledger DP
Default PO Security Code
Default SI Security Code
Workflow Enable Y
Out of Office
Default Printers
Priority
Max
Line Printer TERMINAL 8 8
Form Printer TERMINAL 2 8
OS User must equal IFAS USERID
Allow User to Schedule Jobs
Allow Interactive Jobs
Allow Override for Posted Files
Allow Update to Posted Files
Allow Override of Job Queue
Allow Password Change
Log all IFAS Activity
Line Printers
Max
Form Printers
Max
@@ 8
@@ 8
8
8
8
8
8
8
Commands @@
Information
User Number 4586
Last Password Change 05/30/2007
Last Login Date 06/14/2007

Enter your ID in the value field.

Rebuild the user's security.

Required Non Entity Specific Codes (HRTBHR)

Screen	**Code ID**	**Code**	**Purpose**
HRTBHR	ACTION_CODE	EOA	EO add record
HRTBHR	ACTION_CODE	EOU	EO update record

HRTBHR	ACTION_CODE	EOC	EO close record
HRTBHR	RELATIONSHIP_CD		The County the employee lives in

Required Entity Specific Codes (HRTBCE)

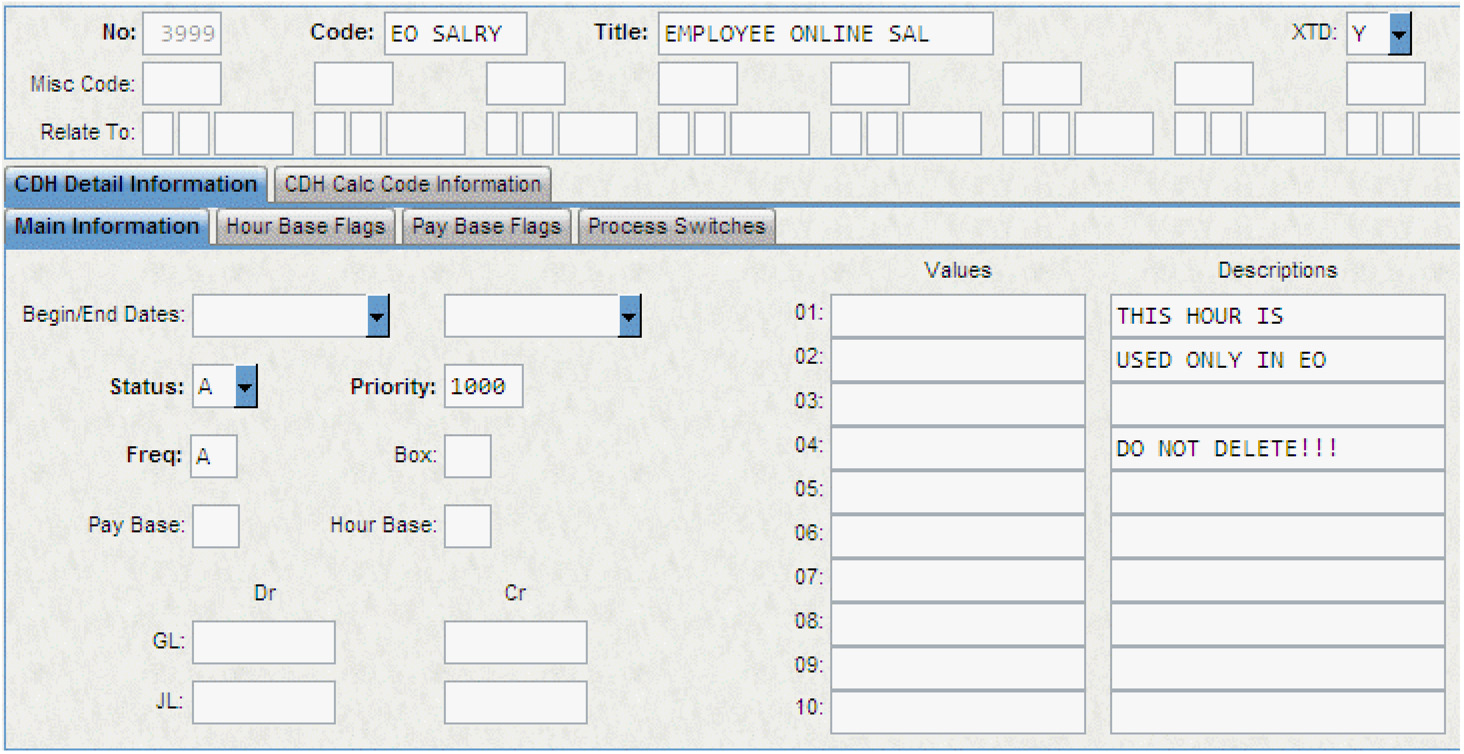
Screen	Code ID / Tab	Purpose
HRTBCE	BENEFIT_CATEGORY	To define the client insurance category types

Create EO CDHS

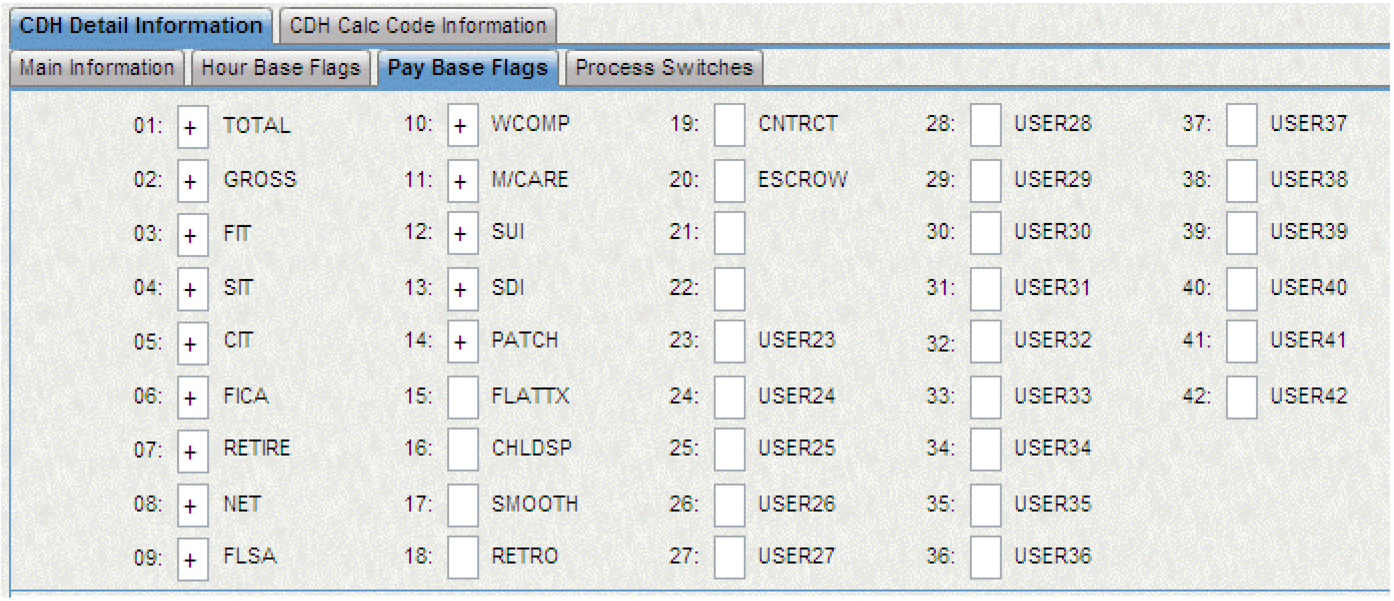
EO Hours and EO Deductions codes are required during the initial set-up and will be used in the 'What If' calculator to display potential changes and employee may wish to make. PRE-TAX AND AFTER TAX deductions both need to be setup; the example is of a pre-tax deduction only.

2.31Create EO Hour Codes (PYUPHH)

Access the hour codes screen (PYUPHH) screen and Select the "+" symbol on the top left part of the screen to add the new Hour Code. Enter the basic hour details in the Hour Definition as shown in the example below:



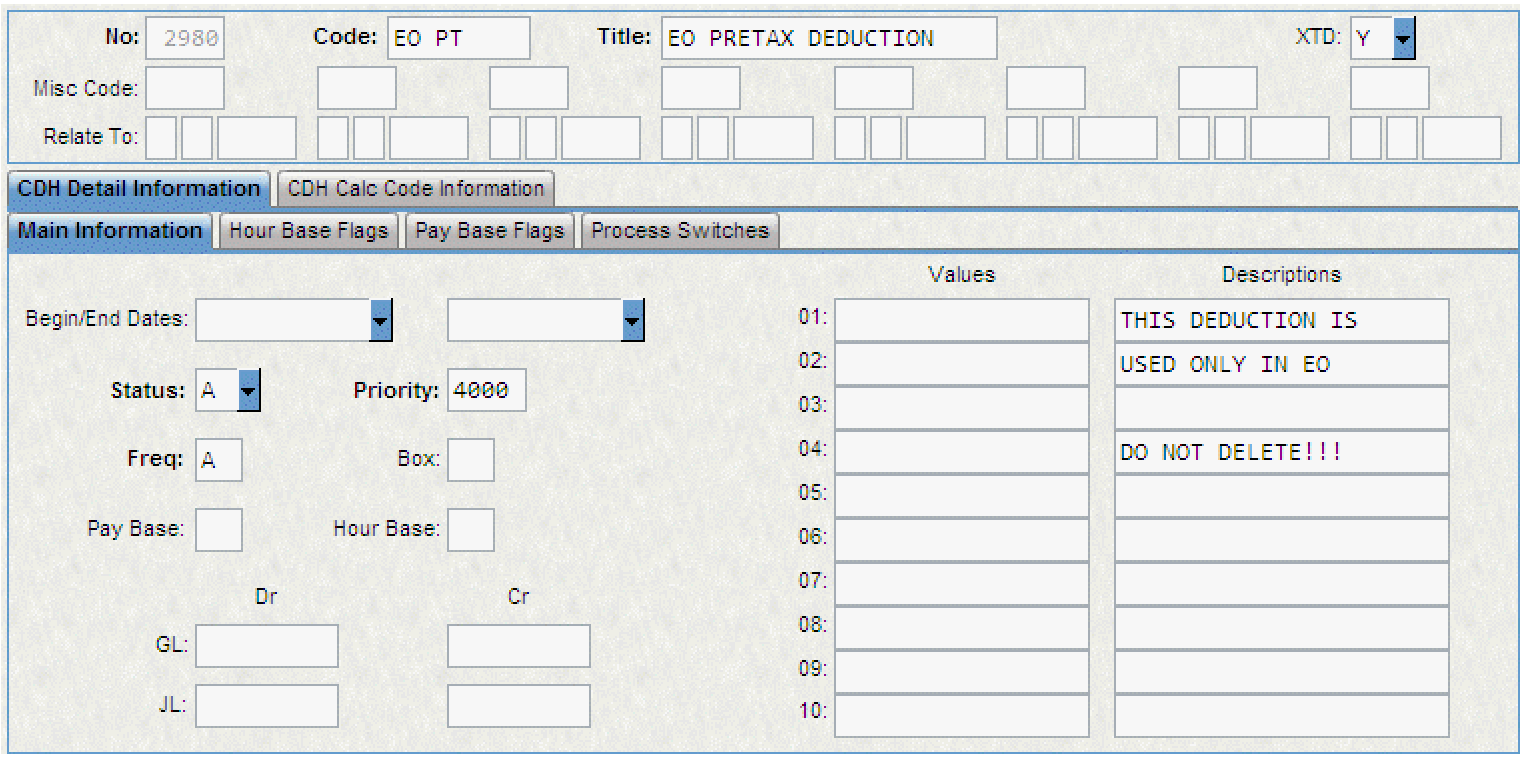
Pay Base Flags: Adjust the applicable pay bases accordingly and press enter to save changes.



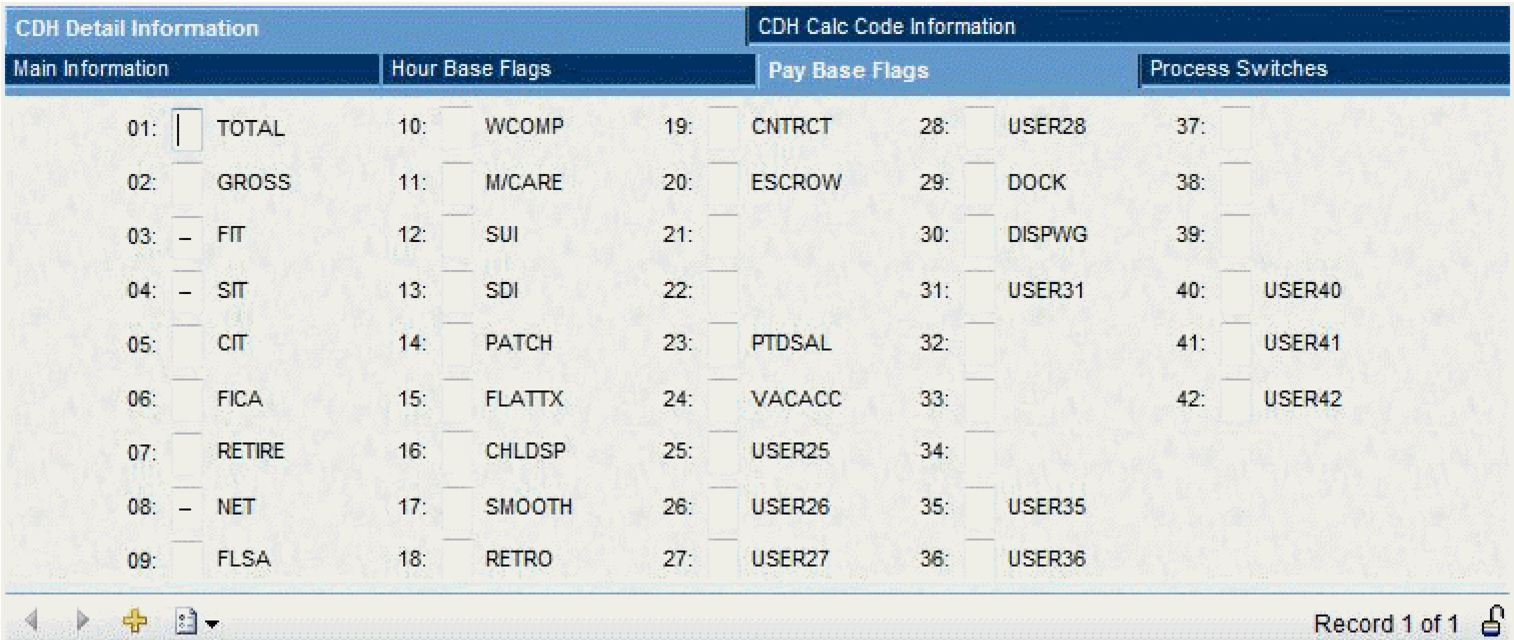
Select the 'Process Switches' tab and enter the following data. Be sure to hit <enter> to save.

2.32 Create EO Pre-Tax and After-Tax Deductions (PYUPDD)

Access the deductions (PYUPDD) screen and select the "+" symbol in the top left side of the screen to add the new deduction. Enter the basic deduction details in the Deduction Definition as shown in the example below:

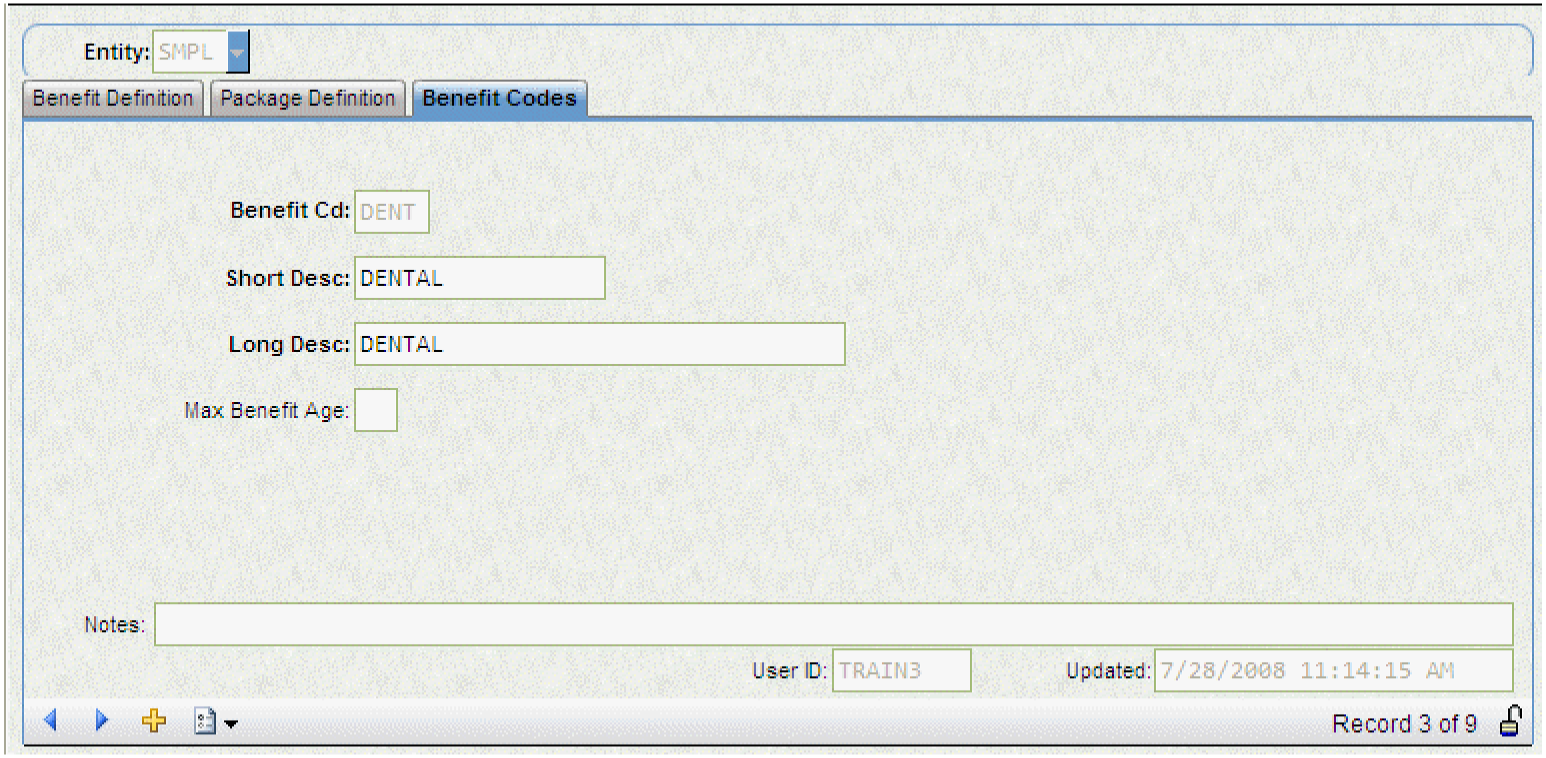


Pay Base Flags: Enter a plus or minus in the applicable pay bases accordingly and press enter to save changes.



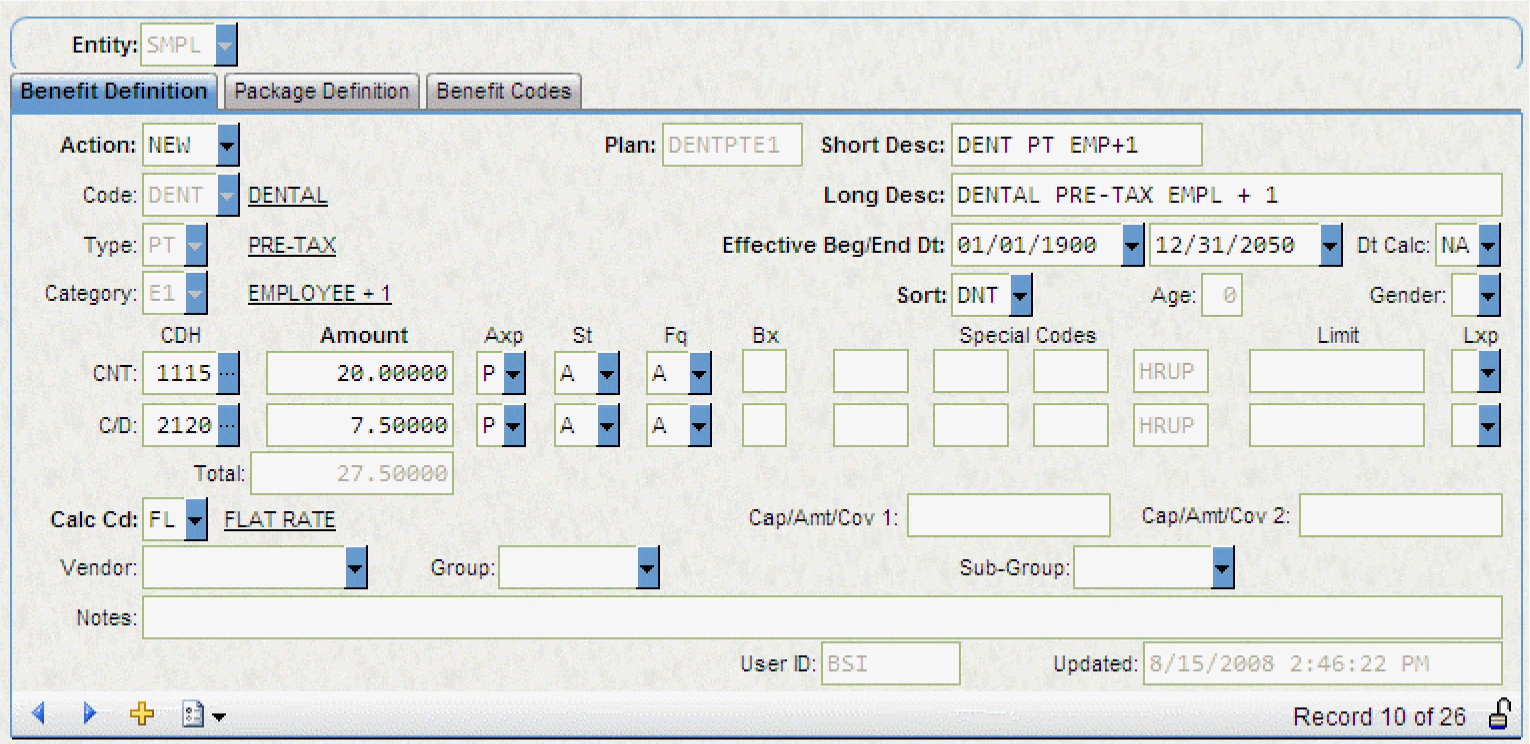
2.33Required Benefit Codes (HRTBBE)

Benefit Codes must be defined to allow plans to be created.



2.34Required Benefit Plans (HRTBBE)

Use this screen to define all active benefit plans to be made available on EO.



2.35Required EO Transaction Definition (HREOSU)

Transaction Class: EO BENEINFO REQUEST

Primary Target: BENEINFO

Secondary Target: DEPDBENF

Subsystem: HR

Allowed Modes: Y

Procedure to Call: EOBENEINFO_PROC BENEPLAN

EOBENEINFO_PROC EO GROUP

EOBENEINFO_PROC EO PLAN TYPE

EOBENEINFO_PROC REQUEST TYPE

Sub Key Title: EMPLOYEE ID

Cluster/Attribute: EMPMSTR ID

EMPMSTR NAME

Transaction Class: EO CDHASSGN REQUEST

Primary Target: CDHASSGN

Secondary Target:

Subsystem: HR

Allowed Modes: Y

Procedure to Call: EOCDHASSGN_PROC BENEPLAN

EOCDHASSGN_PROC EO GROUP

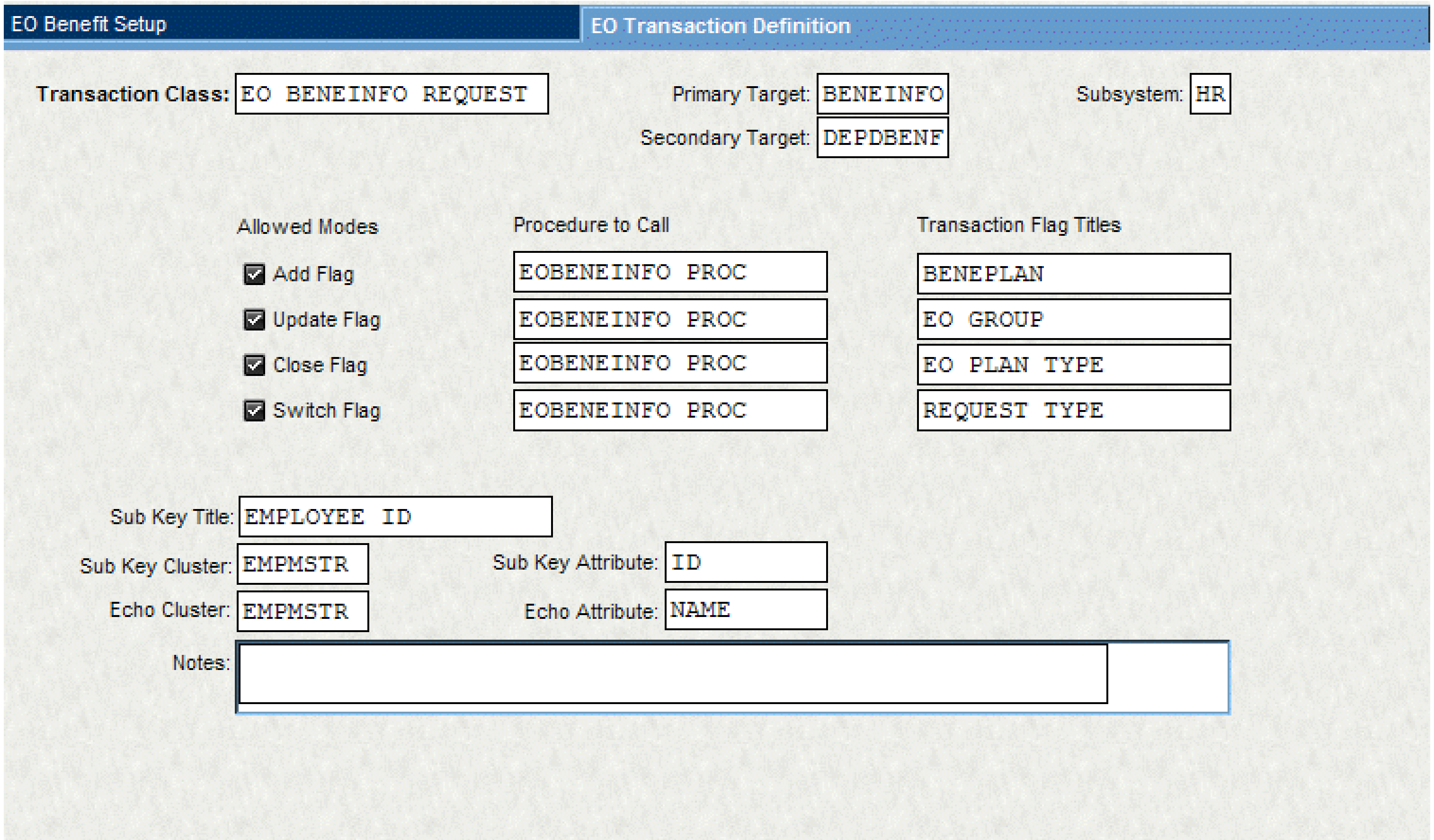
EOCDHASSGN_PROC EO PLAN TYPE

EOCDHASSGN_PROC REQUEST TYPE

Sub Key Title: EMPLOYEE ID

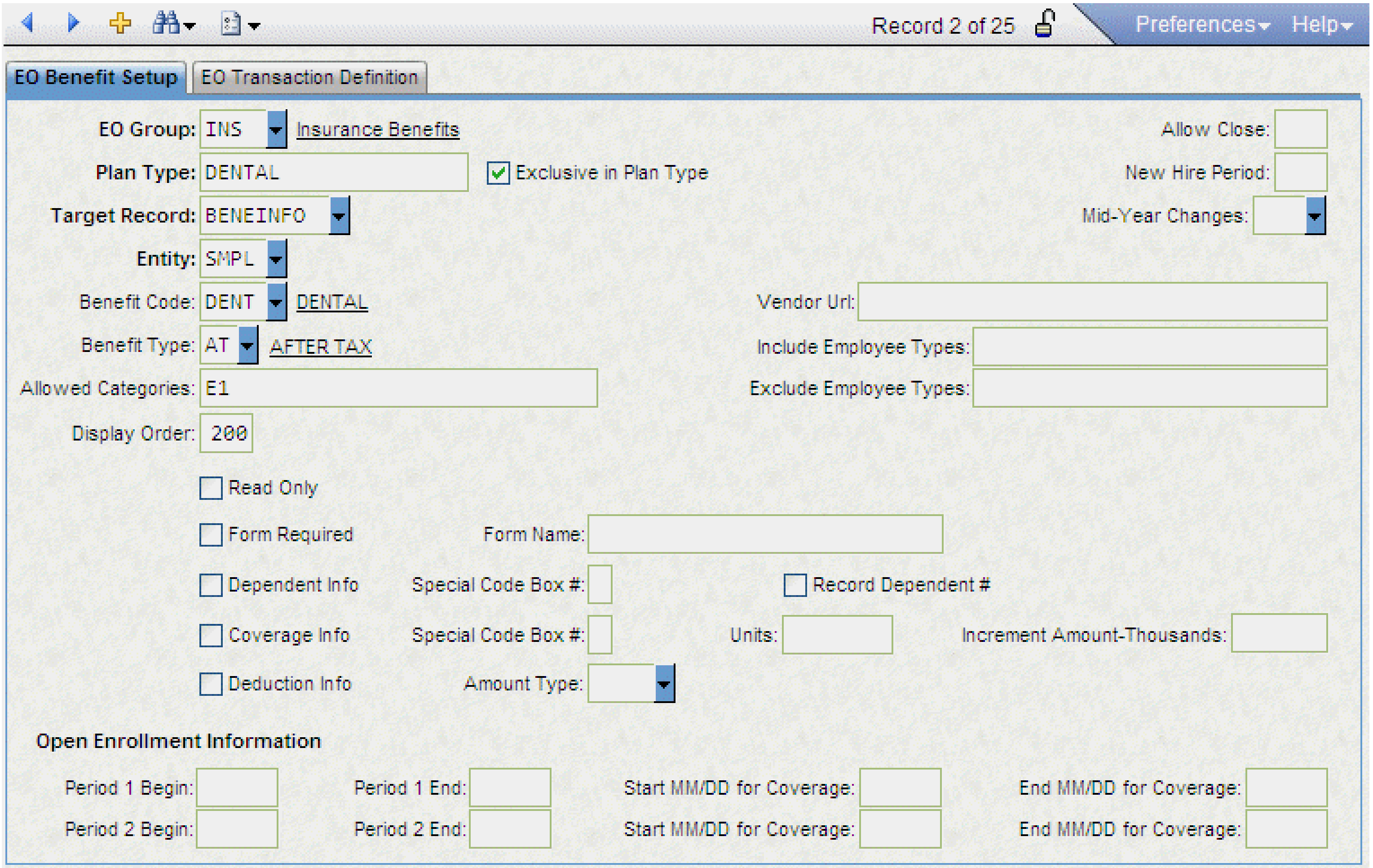
Cluster/Attribute: EMPMSTR ID

EMPMSTR NAME



2.36 Required EO Benefit Master table (HREOSU)

All active benefits defined in (HRTBBE) must be defined in this table and in the Benefunc file.



2.36.1 Required Benefunc File

CSBenefunc.cs is located in: Inetpu/wwwroot/ifas7/App_Code/Emponline/ClientSpecific/Benefunc.cs**.

2.37 Benefit Plans Mapping

Employee Online requires some additional information to understand how Benefits are defined at a given site. Client benefit categories may defer from site to side. The categories below are the system defined categories.

```
/*
public const string CAT_EMP_ONLY       = "EO"; //employee only
public const string CAT_EMP_ONLY2      = "O2"; //employee only secondary type

public const string CAT_EMP_1          = "E1"; //emp plus one other
public const string CAT_EMP_1_OR_MORE = "1M"; //emp plus one or more
public const string CAT_EMP_GT_1       = "G1"; //emp plus greater then one
public const string CAT_EMP_ANYBODY    = "EA"; //emp plus anybody else or nobody else

public const string CAT_EMP_SPOUSE     = "ES"; //emp and spouse
public const string CAT_SPOUSE_ONLY    = "SP"; //spouse only

public const string CAT_EMP_DEPDS      = "ED"; //emp and dependents, no spouse
public const string CAT_SPOUSE_DEPDS   = "SD"; //spouse and depds, no emp
public const string CAT_DEPDS_ONLY     = "DP"; //just dependents, no emp, no spouse

public const string CAT_EMP_FAMILY     = "EF"; //everybody, emp, spouse, depds
*/
```

Example of client defined categories would look like this: You can enter your client defined categories in the section following the system recognized benefit categories.

```
public const string CAT_EMP_ONLY       = "EI"; //Employee Only
public const string CAT_EMP_ONLY       = "WI"; //Waived
public const string CAT_EMP_1          = "EC"; //Employee + Child
public const string CAT_EMP_FAMILY     = "EF"; //Employee + Family
public const string CAT_EMP_FAMILY     = "FN"; //Employee no premium
public const string CAT_EMP_FAMILY     = "FP"; //Employee with premium
```

Each Benefit plan must be defined in HREOSU and needs to be entered into CSBeneFunc.cs file beneplanMapArr area.

An example of benefit plans input into the Benefunc file appear as:

```
public static BeneplanMapEntry[] _beneplanMapArr =
{
new BeneplanMapEntry("DENT",   "ER",  "EO",   BeneUtil.CAT_EMP_ONLY, "     csEmployee",          ""),
new BeneplanMapEntry("DENT",   "ER",  "E1",   BeneUtil.CAT_EMP_1, "         csEmployee + 1",      ""),
new BeneplanMapEntry("DENT",   "ER",  "EF",   BeneUtil.CAT_EMP_FAMILY, "   csFamily",            "")
}
```

Note: do not insert a comma after the last bene plan before the closing }

The first four members of the BeneplanMapEntry are required and are made up of the Benecode, Benetype, Client Specific Category, and the Employee Online Category.

The Benecode, Benetype, and Client Specific Category comprise the Beneplan. The Employee Online Category is chosen based on the meaning of the Client Specific Category and provides the mapping from the Client Specific Category to one understood by Employee Online.

A list of acceptable Employee Online Categories appears in the comments in the CSBeneFunc.cs file. The last two pieces of the BeneplanMapEntry are the Category Description and the Beneplan Description. Certain Benefit Screens in EO will look here for a description of the Category or Beneplan. Typically entries in the _beneplanMapArr will be defined as part of the EO implementation. If the Benefits shown in EO change after the implementation, it is important to make the corresponding changes in the _beneplanMapArr.

2.38 Relationship Codes

In a manner similar to the Benefit Mappings above Employee Online also requires some additional information to understand how RelationCodes for family members are defined at a given site. The first part of this mapping requires that all Relation Codes at the client site are defined as constants in the <Ifas7>/App_Code/Emponline/ClientSpecific/CSBeneFunc.cs file. An example appears below.

System recognized relationship codes:

```
//
// Client Specific (CS) EO.Net dependent type codes.  These need to be changed to match
//      the client's values.  In some cases you may have to add a new entry.  Those entries
//      that are not being used could be commented out or deleted
//
/* not used at this site
   public const string CS_CHILD_REL_CD           = "CH";
   public const string CS_AUNT_REL_CD            = "AU";  //aunt
   public const string CS_UNCLE_REL_CD           = "UN";  //uncle
   public const string CS_COUSIN_REL_CD          = "CS";  //cousin
   public const string CS_SIBLING_REL_CD         = "SI";  //sibling
   public const string CS_BROTHER_REL_CD         = "BR";  //brother
   public const string CS_SISTER_REL_CD          = "SR";  //sister
   public const string CS_GUARDIAN_REL_CD        = "GU";  //guardian
   public const string CS_FRIEND_REL_CD          = "FR";
   public const string CS_STEP_CHILD_REL_CD      = "SC";  //step child
   public const string CS_GRANDMOTHER_REL_CD     = "GM";
   public const string CS_GRANDFATHER_REL_CD     = "GF";
   public const string CS_SON_REL_CD             = "SN";
   public const string CS_DAUGHTER_REL_CD        = "DG";
   public const string CS_AUNT_REL_CD            = "AU";
   public const string CS_NEIGHBOR_REL_CD        = "NG";
   public const string CS_GRANDPARENT_REL_CD     = "GG";
   public const string CS_FATHER_REL_CD          = "FA";
   public const string CS_MOTHER_REL_CD          = "MO";
   public const string CS_EMPLOYEE_REL_CD        = "EM";
   public const string CS_SELF_REL_CD            = "SE";
   public const string CS_STEP_CHILD_REL_CD      = "SC";
   public const string CS_OTHER_REL_CD           = "OT";
*/
```

Example of client specific relationship codes:

```
public const string CS_CHILD_REL_CD           = "CH";
public const string CS_FRIEND_REL_CD          = "EX";
public const string CS_SIBLING_REL_CD         = "OA";
public const string CS_PARENT_REL_CD          = "PA";
public const string CS_SPOUSE_REL_CD          = "SP";
public const string CS_DEPENDENT_REL_CD       = "UA";
public const string CS_OTHER_REL_CD           = "WI";
```

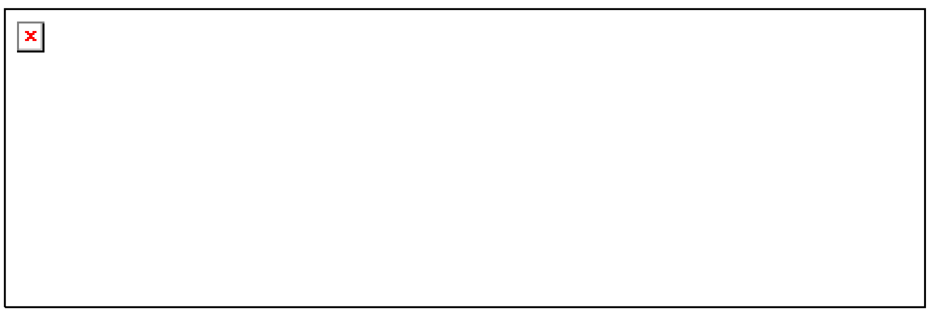
Once the Client Specific Relation Codes are defined then they are used to define the RelCdMapEntry's that that define the mapping from the Client Specific value to one understood by Employee Online.

```
public static RelCdMapEntry[] csRelCdMapArr =
{
  new RelCdMapEntry(CS_CHILD_REL_CD,          BeneUtil.EO_CHILD_REL_CD,          "Child"),
  new RelCdMapEntry(CS_FRIEND_REL_CD,         BeneUtil.EO_FRIEND_REL_CD,         "Former Spouse"),
  new RelCdMapEntry(CS_SIBLING_REL_CD,        BeneUtil.EO_SIBLING_REL_CD,        "Overaged Dependent"),
  new RelCdMapEntry(CS_PARENT_REL_CD,         BeneUtil.EO_PARENT_REL_CD,         "Parent"),
  new RelCdMapEntry(CS_SPOUSE_REL_CD,         BeneUtil.EO_SPOUSE_REL_CD,         "Spouse"),
  new RelCdMapEntry(CS_DEPENDENT_REL_CD,      BeneUtil.EO_DEPENDENT_REL_CD,      "Underaged Dependent"),
  new RelCdMapEntry(CS_OTHER_REL_CD,          BeneUtil.EO_OTHER_REL_CD,          "Widow/er")

};
```

The first two fields in the RelCdMapEntry are required. The third field is an optional description for that Relation Code. There should be a RelCdMapEntry for each Client Specific Relation Code. Again the acceptable Employee Online Relation Codes are present as a comment in the CSBeneFunc.cs file for convenience. Entries in this area are usually defined during the implementation of Employee Online. It is important to update these entries if Relation Codes change at any time.

This area of the CSBeneFunc.cs file also allows for the grouping of Client Specific Relation Codes for use by different screens in Employee Online. Groupings include Parent, Dependent, Eligible Dependent, Spouse, Emergency Info and Family. The Emergency Info and Family groupings are used to filter which entries are shown on their respective EO screens. The Spouse and Eligible Dependent groups are used to filter entries shown on the Benefit screens that are sensitive to Dependents. Here's an example of an Eligible Dependents entry.



2.39 Coverage Choices

Employee Online allows for Benefits which embody a coverage amount (i.e., Supplemental Life). If the coverage amount is fixed then the amount is determined on the associated HRTBBE Benefit Definition Tab, Cap/Amt/Cov 1 and 2 fields are defined to be the same amount. If the coverage varies from a minimum to a maximum in regular steps then the min is defined in Cap/Amt/Cov 1 and the max is defined in Cap/Amt/Cov 2 and the step is defined on the HREOSU EO Benefit Setup Tab, Increment Amount field. In the case where the coverage amounts occur at irregular intervals those steps can be defined in the <Ifas7>/App_Code/Emponline/ClientSpecific/CSBeneFunc.cs file.

To do so first create an array of the acceptable steps like the following:

```
public static decimal[] _cvrgDENEREF =
{
100000,
125000,
150000,
175000,
200000,
225000,
250000
};
```

If the increments occur at irregular intervals then define those steps here.

Remember to leave off the comma after the last value is entered.

The name of the array starts with _cvrg and is followed by the associated Beneplan. Once this array has been defined it must also be included in the following function (found in CSBeneFunc.cs).

```
public static decimal[] CSGetCvrgArr(string beneplan)
{
switch (beneplan)
{
case "DENEREF":
return _cvrgDENEREF;
default:
return null;
}
}
```

Include your benefits plans with arrays defined above here.
For each case “planname”
Return “_cvrgplanname”

2.40 Filtering of Dependents Display on EO

This part of the Benefunc will allow display on EO of the dependents on a benefit plan.

```
public static string[] csParentTypes = new string[]
{
    CS_FATHER_REL_CD,
    CS_MOTHER_REL_CD
};

public static string[] csDependentTypes = new string[]
{
    CS_DEPENDENT_REL_CD

};

public static string[] csEligibleDependentTypes = new string[]
{
    CS_NEIGHBOR_REL_CD,
    CS_OTHER_REL_CD,
    CS_CHILD_REL_CD,
    CS_DEPENDENT_REL_CD
```

2.41BENEFUNC File Trouble Shooting

1. HRPYBE – When creating benefits, think of Employee Online:

Employee online Benefunc.cs file requires that each benefit plan have a category.

IF no benefit category was defined then in the Benefunc file enter the benefit code where the benefit category would be inserted as the work around, as shown below.

new BeneplanMapEntry("", "AT", **"SUPL",** BeneUtil.CAT_EMP_ONLY, "Not Applicable", ""),

2. Benefit Tables associated with EO

The benefit table (HRTBBE) benefit information (HRPYBE), the Employee online Benefit Master (HREOSU) and the Benefits input in the EO Benefunc.cs file must all match exactly.

Relationship Codes Check:

Make sure to check that there is not semi-colon after the last defined relationship code preceding the } symbol.

Make sure your relationship codes exist in the system defined relationship codes.

Check for spelling errors.

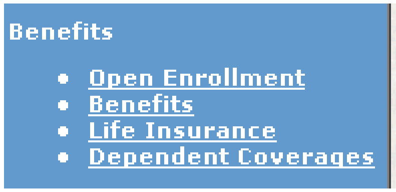
4. In version 7.9.1 **& symbol** is not recognized and will generate the XML error below: that may look like:

"XML Exception found parting request string:"" is an unexpected token. The expected token is ";" line 1 position 1867."

2.42Optional Open Enrollment Menu

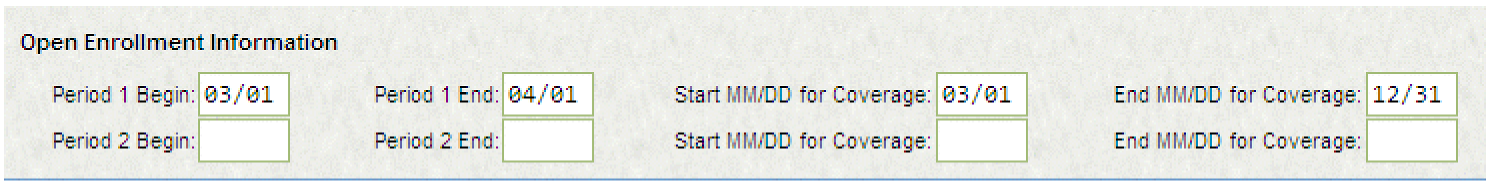
To allow an open enrollment screen you will have to uncomment out or add an open enrollment menu on the menu.xml file which holds all of EO's menus. The menu.xml is located in: C:\Inetpub\wwwroot\IFAS7\EmpOnline\ClientSpecific. The menu looks as follows:

<PAGE URL="./Benefits/OpenEnroll.aspx?Group=OPENENROLL" TITLE="Open Enrollment" />



The Open Enrollment menu will only be available during the open enrollment periods.

The EOBEMSTR (HREOSU) records are capable of holding two different enrollment period definitions. There must be consistency in the begin/end dates for these two enrollment periods.

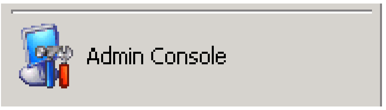


If plans are not showing up in EO check to ensure the Period dates entered above are in MM/DD format and that the payroll are periods defined within the period begin and end dates in common code PYPR CYCLExx.

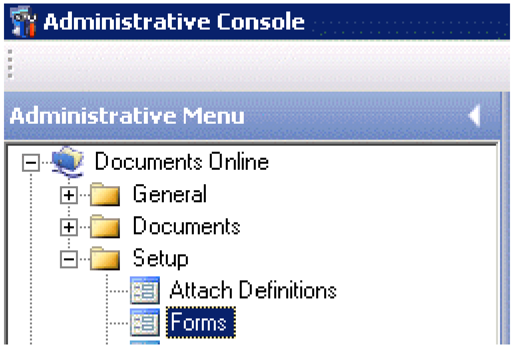
2.43W-2 Form and Attach Definition for Workflow

The following steps will walk you through the process of adding the W-2 Form Image into Documents Online and then setting up an Attachment Definition which will define how the W-2 gets linked to a user.

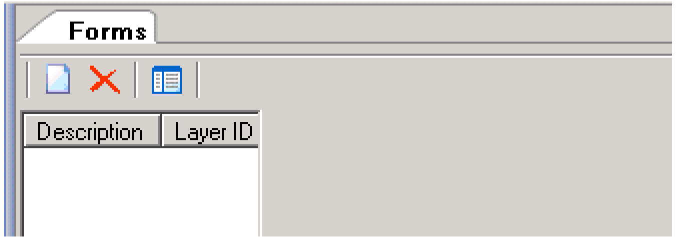
Access the Admin Console from the server



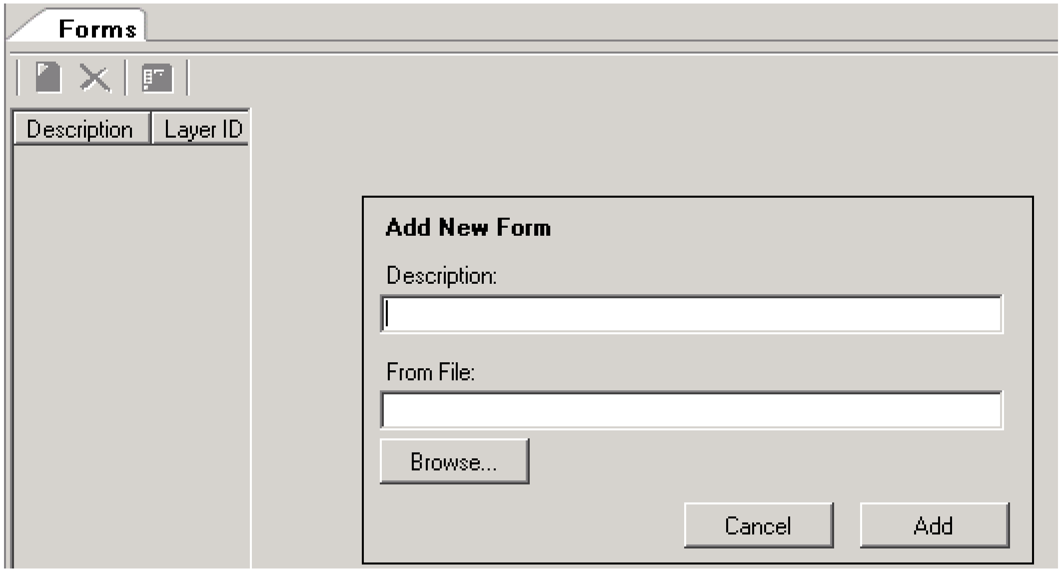
Under Documents Online select Setup, and then double click Forms.



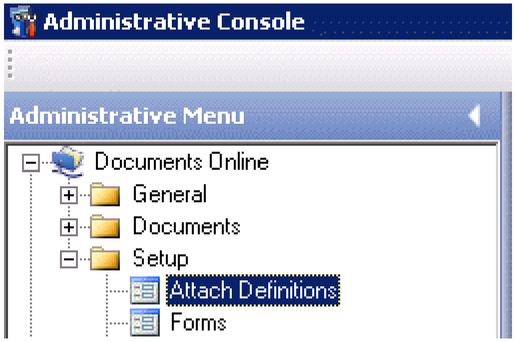
Add a new form by selecting the white paper icon.



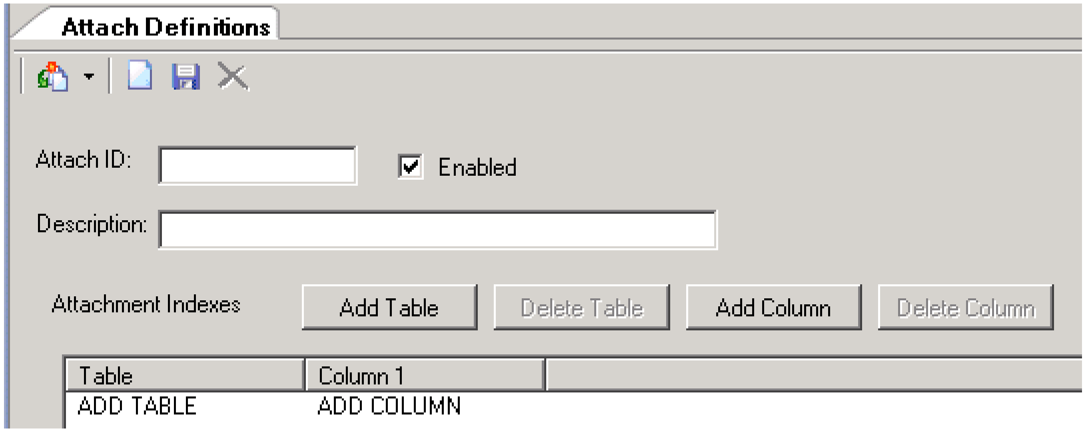
Specify the description such as W2 along with the year it is for. Employee Online will use this description as the display for the W-2. Your form should have already been ordered and will reside in your directory.



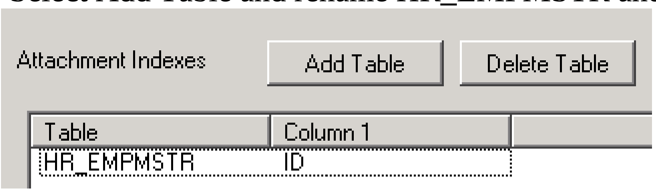
Under Documents Online select Setup, and then double click Attach Definitions.



Next, Attach a Definition. Add a new Attach Definition by selecting the white paper icon and give it a unique Attach ID and a description.



Select Add Table and rename HR_EMPMSTR and change column 1 from Add Column to ID.



After your save, write down your attach ID to use it when you configure the W2_TO_DO workflow model.

2.44W-2 Workflow Configuration

Choose file, then Open, and browse to the W2_TO_DO and select the W-2 to Documents Online and click Ok

Right click on the 'Assign Form to Document' node and choose Edit Properties. Navigate to the 'Who, Action, and Wait' tab. In the Action area, ensure 'Assign Form to Document' is selected from the dropdown list and then click Settings. On the Form Name dropdown, choose the new form you added in Step 2 of the Documents Online configuration. This will be the form that the W-2 Data will be placed on. Keep in mind that this will need to be set each year before running W-2's. Click Ok on both screens.

Next, right click on the 'Document' Node and choose edit properties. Navigate to the 'Who, Action, Wait' tab. IN the 'Action' area, ensure 'Document is selected from the dropdown list and then Click Settings. Type in the name of the Attachment Definition you created of the Documents Online Configuration into the Attachment Definition edit box. Click Ok on both screens.

Choose File and Save, and exit the Workflow Designer.

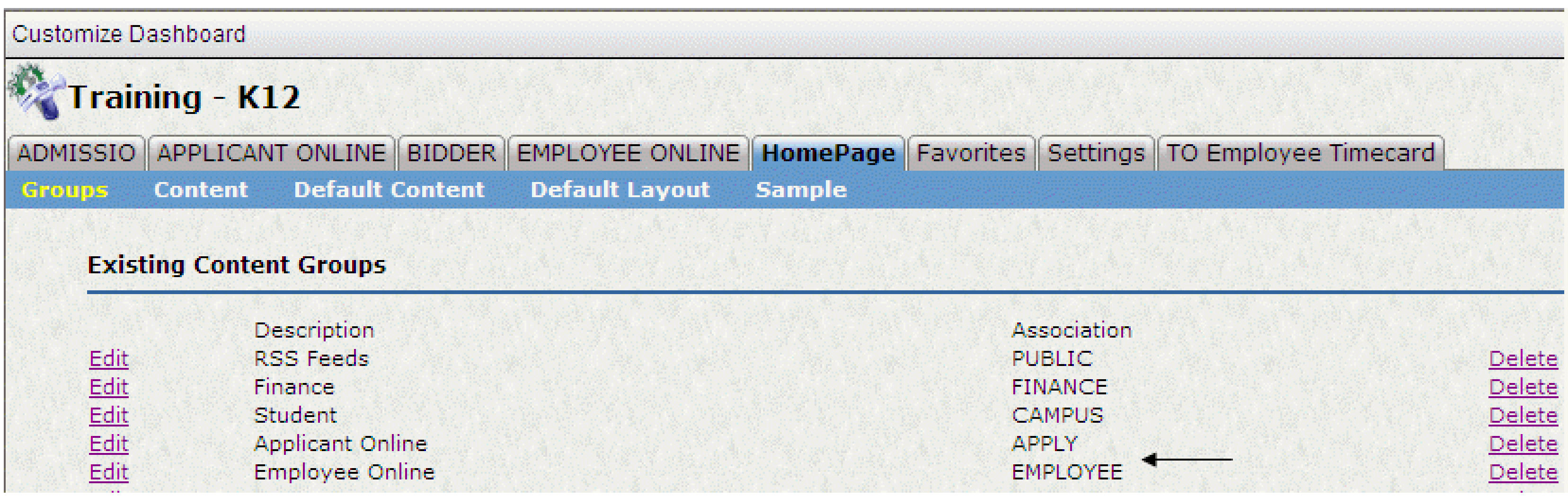
To activate the workflow for EO, run the PYW2PW process, specify the printer to WORKFLOW, and ensure that both the Line printer and the Forms printer priorities match.

2.45Required Customize Dashboard

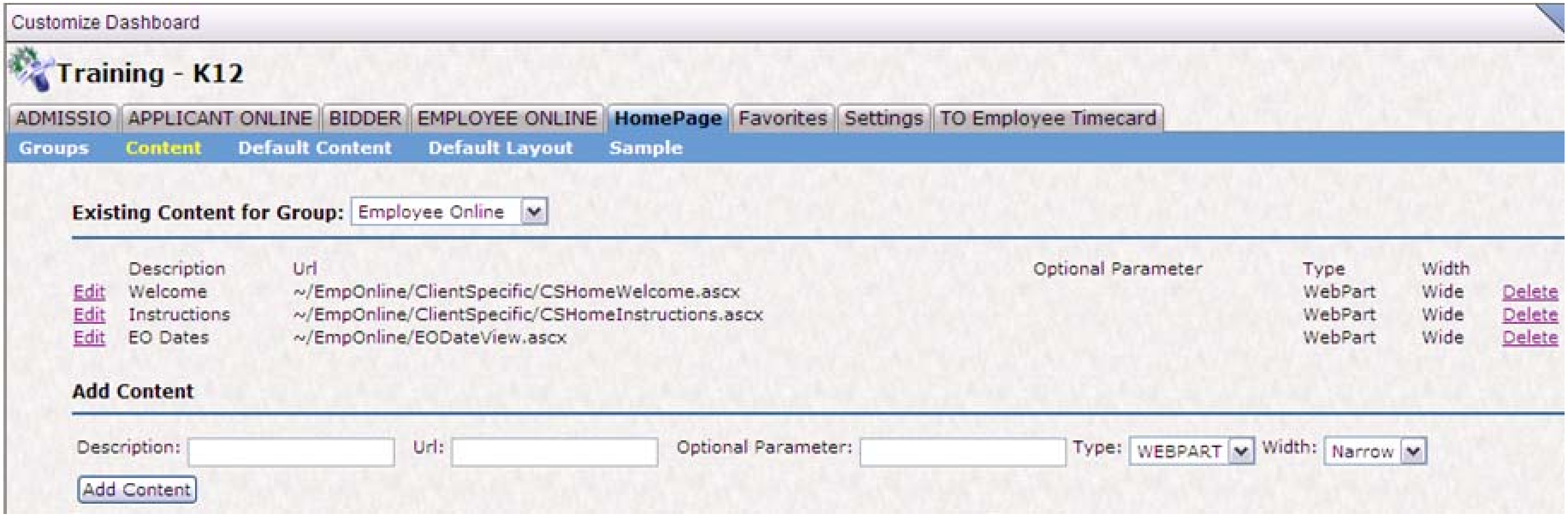
To get welcome page and Instructions to show up on Employee Online you need to login to Customize Dashboard as an administrator.

http://localhost/Ifas7/home/customize/

On the Home Page tab select Groups and make sure that for Existing Content Group that Employee Online has the Association set to EMPLOYEE.



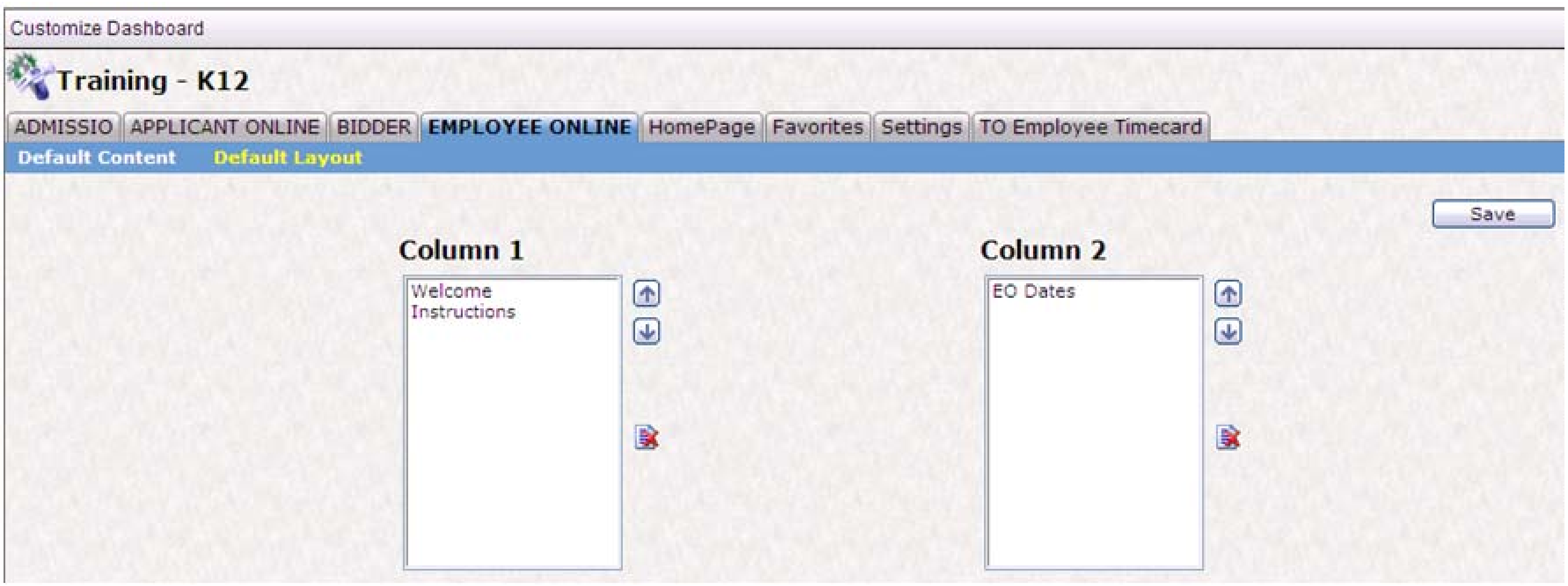
Then On the HomePage tab go to Content and make sure to add the pages and urls for Welcome, Instructions, and EO Dates. They should be located in: C:/ inetpub / wwwroot / Ifas7 / EmpOnline.



To change the width and how these boxes appear in EO you may have to delete the URLs here are re-enter them again for your new Width to take effect.

Then go to the Employee Online Tab and select Default Content; put a check box in Welcome, Instructions, and EO Dates. Make sure to SAVE.

Next select Default Layout and add Welcome, Instructions, and EO Dates into the columns. Make sure to SAVE.

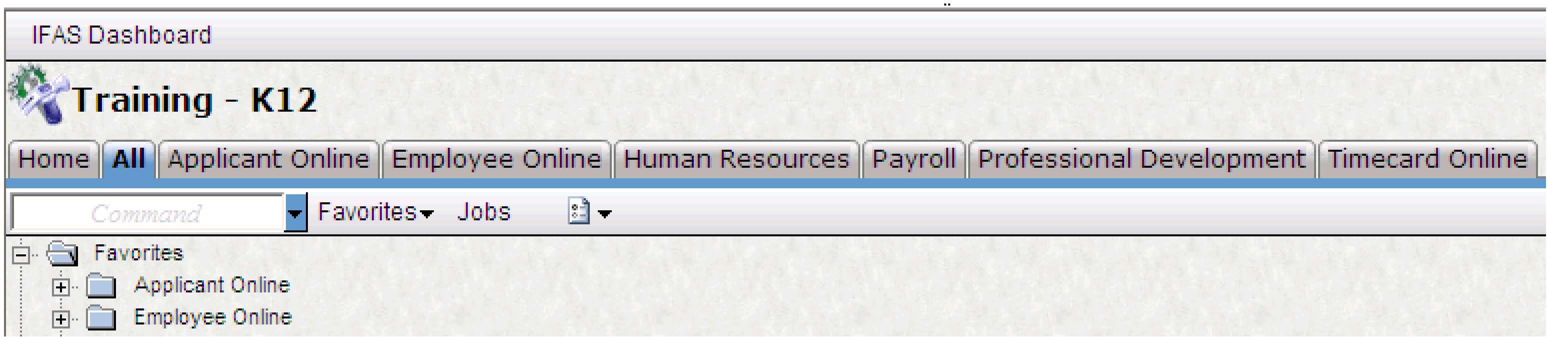


2.46 Add EO Tab to the Dashboard

Create a Public Employee Online Folder within Favorites

Click on the FAVORITES option

Click NEW PUBLIC FAVORITES and name it 'EMPLOYEE ONLINE'



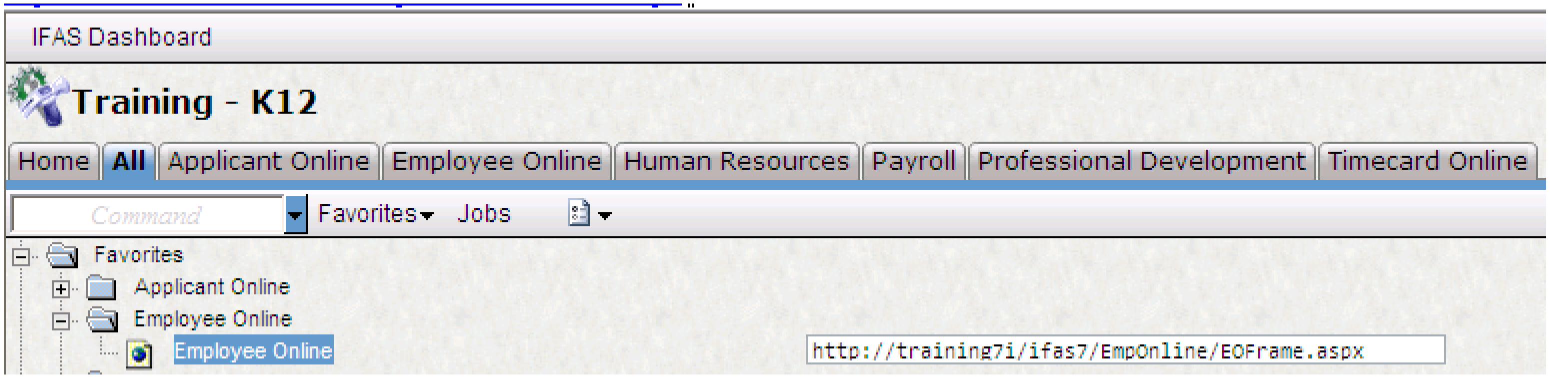
Add a Web Link to the EMPLOYEE ONLINE Folder

Click on the EMPLOYEE ONLINE folder to make it active.

Click on FAVORITES and choose: NEW WEB LINK IN 'EMPLOYEE ONLINE'

Type in the Web Link name 'EMPLOYEE ONLINE' and enter this web address:

http://servername/ifas7/home/EmpOnline/EOFrame.aspx

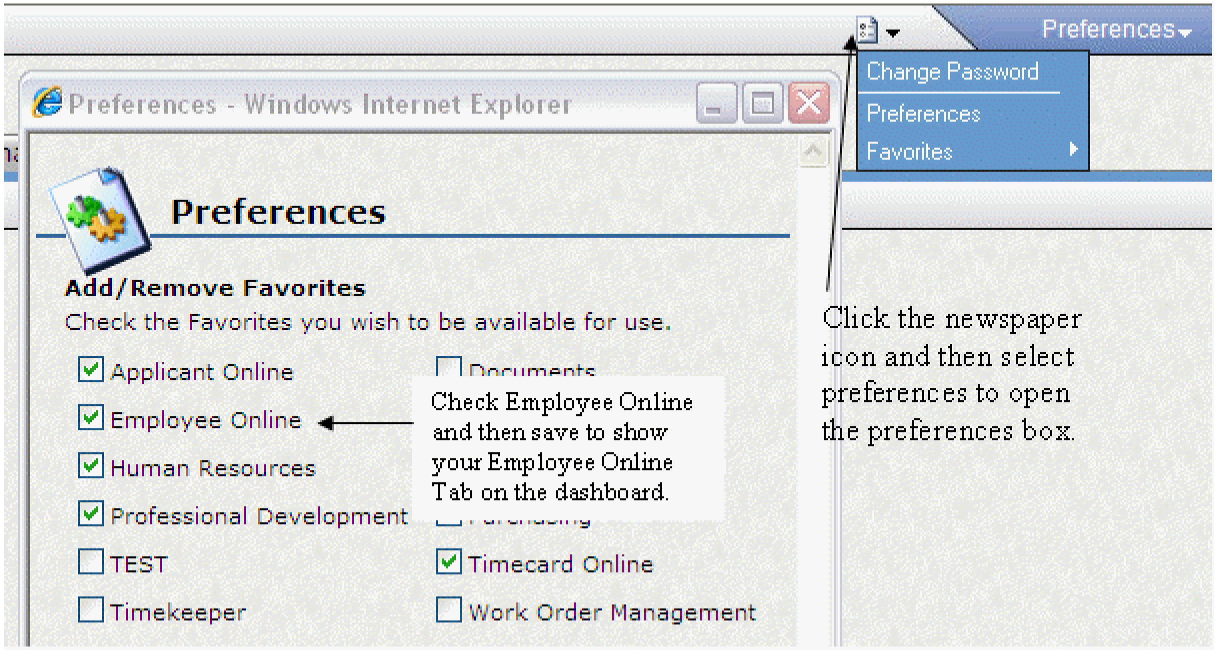


Complete adding your FAVORITE on the DASHBOARD.

Select the options icon from the dashboard.

Select Preferences top open the preferences dialog box.

Check EMPLOYEE ONLINE and depress the save button.



2.46.1 Employee Online Development Requests

Employee Online has forms that will need tickets submitted to development. Submit a separate ticket for the EO stub when you request your EFL forms.

EO Check stub

W-2 Work Flow

2.46.2 Employee Online Client Specific Files

In addition, to the Benefunc file there are other client specific files that reside in: C:\Inetpub\wwwroot\IFAS7\EmpOnline\ClientSpecific folder.

2.47 Employee Online Menu

The menul.xml file controls the Employee Online menu.

The administrator has the ability to control the Employee Online features the user is exposed to through the site map and can even add in new web links that will take the user to outside destinations. The site administrator should modify <ifas7>/EmpOnline/ClientSpecific/menu.xml to configure the site map. In the following example you can see a custom entry highlighted in blue that will take the user to the external web site for CNN:

```
<?xml version="1.0"?>
<SITEMAP>
<!-- standard EO URL's should start with '.' and they will appear in the current frame. -->
<!-- custom client menu entries should start with 'http:' and will be launched in a new -->
<!-- browser window. -->
<!--   Example of custom client entry:      <PAGE URL="http://somemachine/somewebsite/clientpage.asp?"
-->

<CATEGORY TITLE="EO Home" CLASS="user">
  <PAGE URL="./home/home.aspx" TITLE="Message Page"/>
  <PAGE URL="./misc/EmployeeDirectoryIndex.aspx" TITLE="Employee Directory"/>
  <PAGE URL="./misc/MiscForms.aspx" TITLE="Forms"/>
  <PAGE URL="http://www.cnn.com" TITLE="CNN"/>
</CATEGORY>
<CATEGORY TITLE="Personal Information" CLASS="user">
    <PAGE URL="./PersonalInfo/EmpmstrInfo.aspx" TITLE="Home Address"/>
    <PAGE URL="./PersonalInfo/EmerInfoIndex.aspx" TITLE="Emergency Info"/>
  <PAGE URL="./familyinfo/FamilyInfoIndex.aspx" TITLE="Family Info"/>
</CATEGORY>
<CATEGORY TITLE="Pay Info" CLASS="user">
    <PAGE URL="./PayCheck/DirDepInfoIndex.aspx" TITLE="Direct Deposit" />
    <PAGE URL="./PayCheck/SavBondsInfoIndex.aspx" TITLE="Savings Bonds" />
    <PAGE URL="./PayCheck/DefCompInfoIndex.aspx" TITLE="Deferred Comp" />
    <PAGE URL="./PayCheck/PayCheckInfoIndex.aspx" TITLE="Pay Stub" />
    <PAGE URL="./PayCheck/TaxInfo.aspx" TITLE="Tax Info" />
  <PAGE URL="./PayCheck/WhatIf.aspx" TITLE="What If" />
  <PAGE URL="./PayCheck/W2List.aspx" TITLE="W2 Info" />
</CATEGORY>
```

If you do not wish to display a menu on EO, comment it out by adding <!- - at the beginning of the selected menu and a -->

Example:
<! -- <PAGE URL=”./Paycheck/whatif.aspx” TITLE=”What If”/>-->

The Site Map assumes that URLs with relative paths (names starting with a period) are internal pages and when visited they will appear in the current application frame. The URLs that have full path names (like http://www.cnn.com) will be opened in a separate browser window. In addition to adding new page links, the administrator can add new sections to the Site Map by wrapping pages in category tags. The names for the site map headings and links can also be customized in this file.

EOHomeWelcome.ascx

This file holds the content of the message of the day for message board page. It can contain any information that the EO administrator would like to communicate to someone logging on to Employee Online.

EOHomeInstructions.ascx

This file contains basic usage instructions intended to help EO users get acquainted with EO. EO administrators can add whatever information they believe is necessary to instructions files.

2.47.1 Header / Footer Pages

The fields can be used to define further help pages or add headers and footers to specific EO screens. Templates for these files are in the directory: <ifas7>/EmpOnline/ClientSpecific. The name of the directory folder that holds these files, Client Specific, implies this area is reserved for Client use and the files located here will not be overwritten by software updates. Each Employee Online screen has a footer and header associated with it. The image below is what the files looks like before it has been modified to display a footer or header.

```
public void Page_Load(object sender, System.EventArgs e)
{
        this.Visible = false;

        if(!this.Visible)
        {
                return;
        }

        /*
        Label HeaderMsg = (Label)FindControl("CSHeaderLabel");
        if (HeaderMsg != null)
        {
                HeaderMsg.Text = "Dynamic header example.";
        }
        */
}
```

Change the false to **true**

Remove this comment begin.

Remove this comment end.

To add a footer or header to an EO page

Locate the file of the screen you wish to add a footer or header to: <ifas7>/EmpOnline/ClientSpecific. The file is an ascx extension file. In the file, Look for a string "this.visible=false"; change the false to true. Remove the comments from the string that begins "Label FooterMsg…" Enter your footer in quotes after the string "FooterMsg.text=…" this uses html. You can look up html to define the color, font, and alignment. See example below for basic html language.

<p This is a paragraph</p> for the message

<font color=660000 660000=maroon color, not entering any font specification will default to black.

<align=center/> to center text on page. Default is left alignment.

<b>bold text/b> To bold the text.

To add a header, modify the appropriate EO header file.

Below is an example is a WhatIFfooter file modified to display a footer.

File Edit Format View Help

```
<%@ Control Language="c#" TargetSchema="http://schemas.microsoft.com/intellisense/ie5" %>
<%@ Import Namespace="System" %>
<%@ Import Namespace="System.Web.UI.WebControls" %>
<%@ Import Namespace="System.Web.UI.HtmlControls" %>
<%@ Import Namespace="IFAS.Portal.Employee.Util" %>

<script language="C#" runat="server">

        public void Page_Load(object sender, System.EventArgs e)
        {
                this.Visible = true;

                if(!this.Visible)
                {
                        return;
                }


                Label FooterMsg = (Label)FindControl("CSFooterLabel");
                if (FooterMsg != null)
                {
                        FooterMsg.Text = "<p align=center><font color=660000><b>Please call payroll should you have questio
                }

        }

</script>

<br/>
<table id="CSFooterTable" class="Page" width="100%" runat="server">
        <tr>
                <td>
                        <asp:Label ID="CSFooterLabel" Runat="server">
                                Static footer example.
                        </asp:Label>
                </td>
        </tr>
</table>
```

Employee Online CSWhatIFfooter file with a header and a footer. The header did not have a specified font alignment and the footer has a center font alignment.

Employee Online | Professional Development | Timecard Online

What If MARGARET LUNDEEN Help

Should you have any questions, please contact payroll.

WHAT IF CALCULATOR				RESULTS		
	Description	**Baseline**	**What If**	**Description**	**Baseline**	**What If**
GROSS	DOLLARS			EARNINGS		
PRETAX	PRETAX1			PRETAX DEDS		
	PRETAX2			TAXABLE EARNINGS		
	NEW PRETAX			FICA EARNINGS		
TAXES	FIT STATUS			FED WITHHOLDING		
	FIT EXEMPTIONS			FICA WITHHOLDING		
	FIT ADDITIONAL			MEDI WITHHOLDING		
	SIT STATUS			SIT WITHHOLDING		
	SIT EXEMPTIONS			ESTIMATED NET		
	SIT ADDITIONAL					
POSTTAX	DEDUCTION 1					
	DEDUCTION 2					
	DEDUCTION 3					
	DEDUCTION 4					

Estimates will be based on checks in month.

Create Baseline

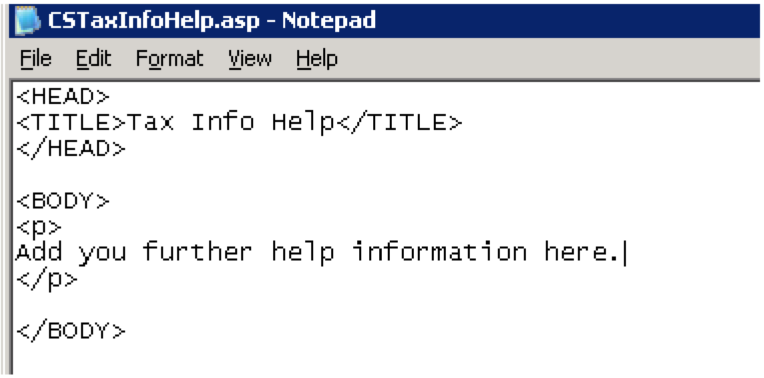
This screen is an estimation tool only. It cannot calculate exactly what will appear on your next check.

If you leave the Baseline dollars field blank the system will provide a default dollar amount. Please view the Help file for further information about how this screen works.

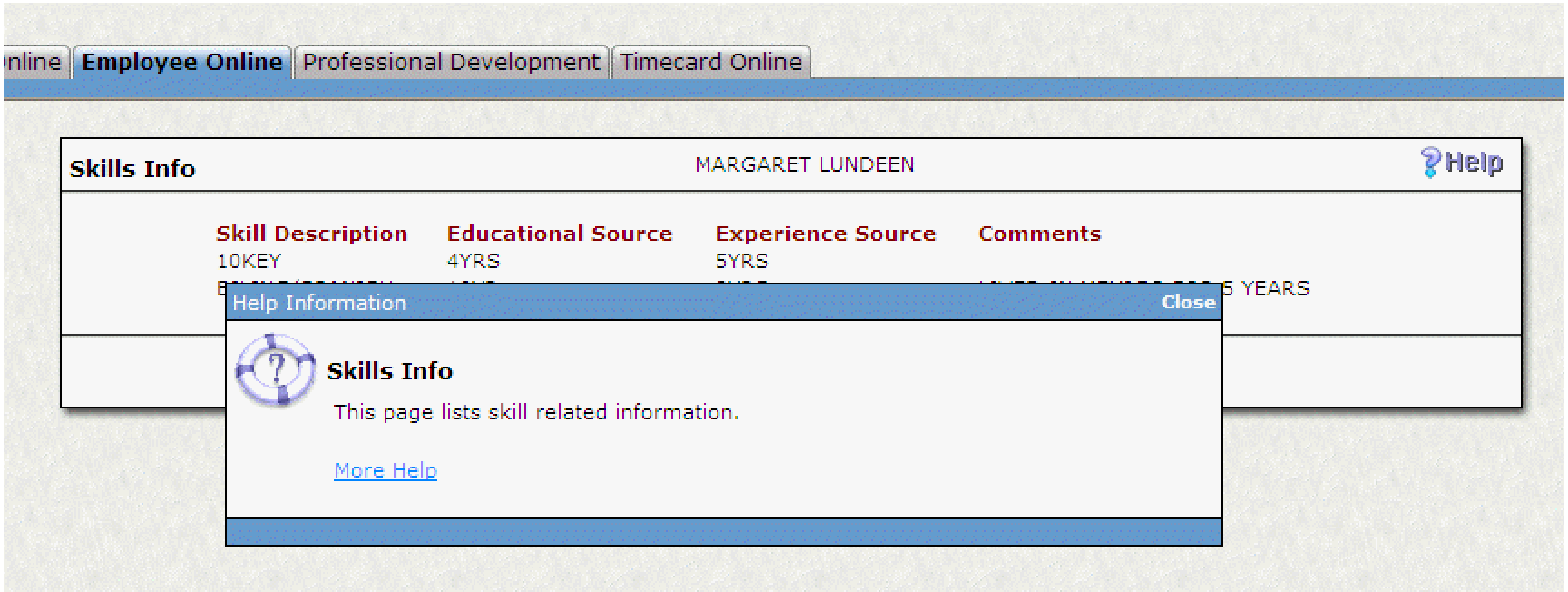
Please call payroll should you have questions.

2.48Help Pages

Locate the page in which you wish to add more help to located in: <ifas7>/EmpOnline/ClientSpecific. Use these help paged on each EO screen to include additional help. Help pages use the asp extension files.



When an employee selects the more help link, a browser window will display further help information.



2.49PDF Forms

EO Forms menu holds PDF forms that reside in the directory. The actual forms will need to be saved under: <ifas7>/EmpOnline/ClientSpecific folder. EO stores forms in two areas.

1. You can put forms under the Benefits menu:

<ifas7>/EmpOnline/ClientSpecific/CSBenefitForms.ascx.

2. You can put forms under a miscellaneous form menu:

<ifas7>/EmpOnline/ClientSpecific/CSMiscForms.ascx.

2.50 How to Add Miscellaneous Form

The Forms page utilizes the client specific file called, CSMiscForms.ascx, to list the available forms for download. The basic layout of the page is a table with two columns. The first column displays a clickable form name that links to a file within the EmpOnline\ClientSpecific folder. The second column displays a brief description of the form. Below is an example on how to add a form:

Insert the below code after the first two table rows. For easier navigation, go to the line immediately after the line that reads:

```
<!-- ADD FORMS BELOW THIS LINE -->
<tr>
<td>
<a href='<%=EOConsts.EO_CLIENT_SPECIFIC_URL%>/FormFileName.pdf' target="_new">Form Name Here</a>
</td>
<td>
Description goes here.

</td>
</tr>
```

Replace 'FormFileName.pdf' in the file with the name of your form that you saved in the EmpOnline\ClientSpecific folder for EO to reference. This is the text that becomes clickable.

Replace 'Description goes here' to reflect the description of your form. If no forms are to be displayed, it is recommended to change the visibility state of the client specific page.

To do this, change this line, in the file:

this.Visible = true;
To:
this.Visible = false;

This will causes the message 'No forms available' to appear on the page.

Additional Client specific functionality has been added via the following files.

The following files are additional files that can be configured to reflect client's specifications.

Deferred Compensation Screen

Allows for additional where constraints on the fetch of data for the DefCompInfoIndex.aspx screen.

<ifas7>/App_Code/EmpOnline/ClientSpecific/ CSDefComp.cs

Employee Directory Screen

Allows for additional where constraints on the fetch of Employee records for the Employee Directory page.

<ifas7>/App_Code/EmpOnline/ClientSpecific/CSEmployeeDirectory.cs:

Family Screen

Provides a means of customizing columns on the initial Family page.

ifas7>/App_Code/EmpOnline/ClientSpecific/CSFamilyUtil.cs:

FamilyInfoIndex.aspx. The default version of this page shows a grid where each row represents a family member. The last column on the grid is titled Other Ins and contains a value of Yes or No depending on whether Primary Provider 1 or 2 has been populated. This client specific file allows you to override the last column with a title and value relevant to your site. An additional column can also be made visible if desired. Comments in this file show an example of how to accomplish this type of override.

2.51 Employee Online Administration

All Employee Online user accounts are maintained in the IFAS NUCLEUS subsystem, which provides a central one-stop location for maintaining user accounts throughout the IFAS and Dashboard applications. User accounts are stored in the us_usno_mstr table. An employee Administrator has several tools to maintain users and assist users in certain EO functions. Access to Employee Online is granted via the existence of an Association named EMPLOYEE with the value being the Employee's ID. Administrative access is granted using an Association named EOADMIN again with a value of the Employee's ID.

1. Create New Users

The NUCLEUS subsystem contains a tool called Create New User IDs (menu mask NUUTNU) which automatically creates User accounts from employee HR records. Employees can be migrated using a variety of selection methods and criteria.

Configure the following common codes before you create your new user accounts:

NUFG/NU945C and NUSC/NEWUSEREO. Please refer to the NUCLEUS Common Codes documentation for more information.

This Utility creates new Nucleus Users based on rules defined on a template user. In NUUPUS, you will create a new template user with the appropriate association 'EMPLOYEE', Status of P to force a change of password, and give the appropriate security restrictions. Employees must be given an initial password with which to logon, (SSN or employee ID). An organization will have to determine how to generate these initial passwords and communicate them to the employees.

The utility will copy all of the Template User's information **EXCLUDING** the following:

us-no (user number) which is newly generated if this is a new employee

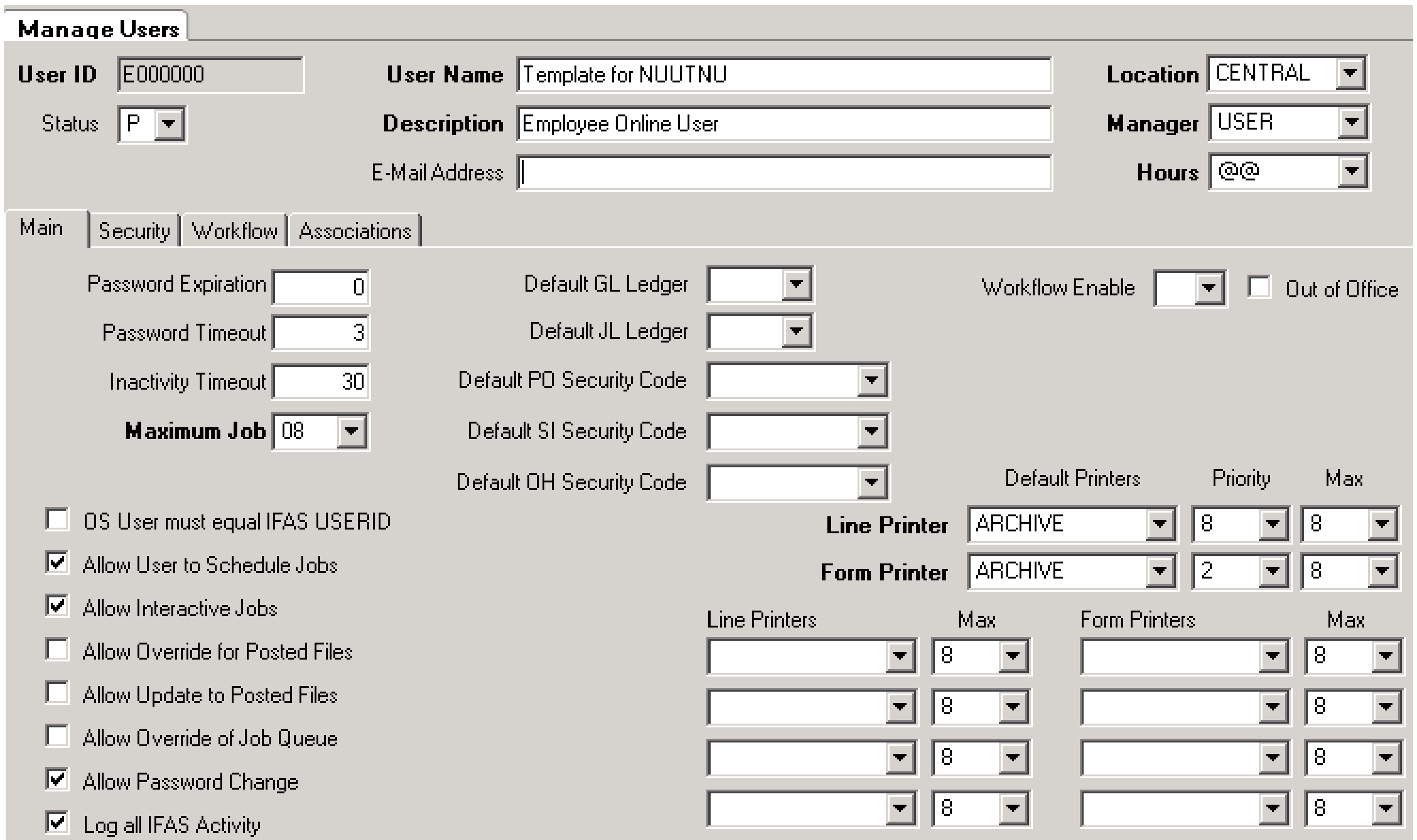
us-id is set to the new ID of the selected user

us-pw and us-pwhex are set to the determined password

us-pw-dt is set to 5 years prior to the current date. This is done so that if password duration is specified then it will automatically require the user to reset their password upon initial login and every time that duration is met.

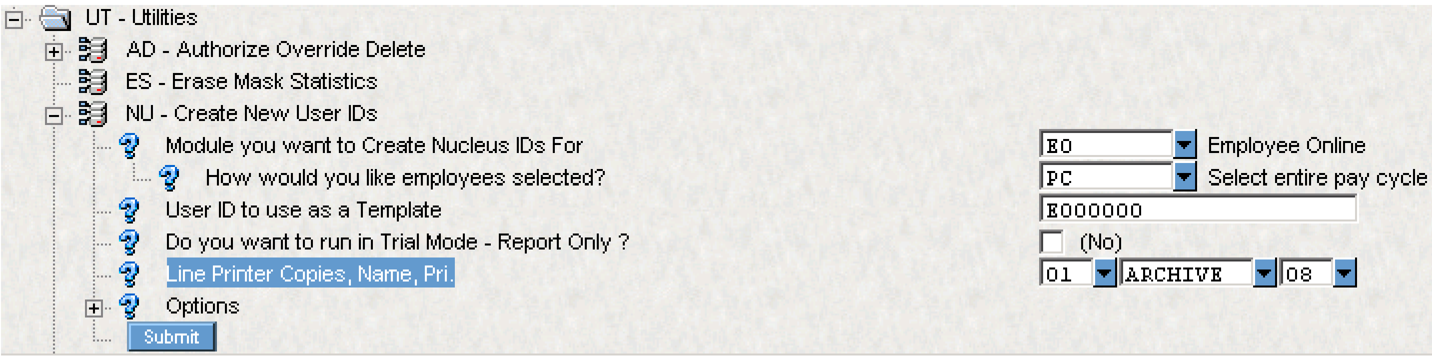
If the user is already defined then the utility will copy any missing associations to the new user and the new Nucleus ID and associations. If the user wants to run a trial to see what is going to happen a question has been added so no changes will be made and just the report is created.

Give your Template user the appropriate association and security.



2.52 Create New User Utility (NUUTNU)

Select your Module and your selection criteria to specify for which employees to create new user accounts. Enter the template ID you created in NUUPUS for the utility to use. This utility has an option of running in a test mode, check the box next to No to change to Yes and run in test mode. And print in Archive to view report.



2. Impersonate User Tool

This impersonate user tool allows an Employee Online Administrator to search for an employee and assume their identity temporarily, for troubleshooting purposes. The criteria that may be used to search for an employee may be any combination of their partial or full Employee ID, First Name, Last Name, and Social Security Number. This is useful when trying to track down problems experienced by a particular user.

3. Password Maintenance

Employee user accounts are maintained through the NUCLEUS Update User Information screen (mask NUUPUS).Employees login to Employee Online using their employee ID and a Password. By default, all employee passwords are encrypted. It should be emphasized to the employee that this password should be kept secret as it represents access to sensitive payroll data.

Reset Password

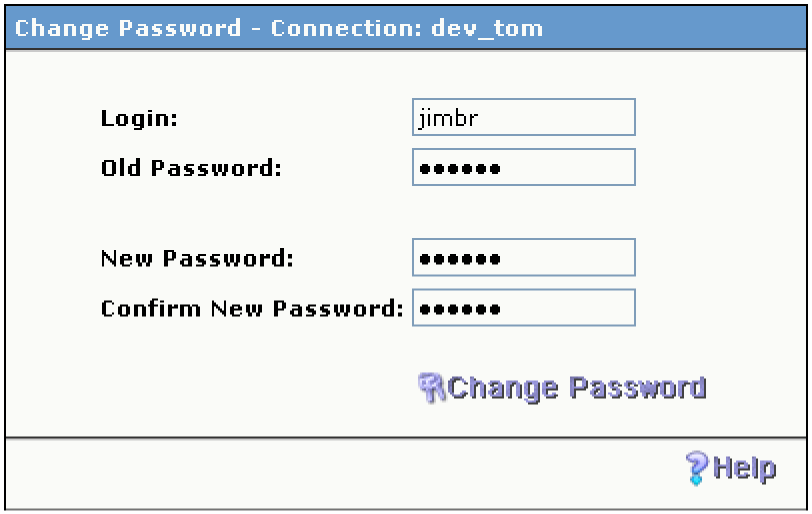
In the case of a new employee (or an employee forgetting their password), an EO administrator can open the Set User Password tool from the NUUPUS screen to set or reset the employee's password.

Force Password Change (expire password):

Changing the user's status to 'P' causes an employee's password to be immediately set as expired. The next successful logon will force the employee to pick a new password. This expiration along with encrypting the password can ensure that only the employee knows what the password is, thus strengthening the audit trail.

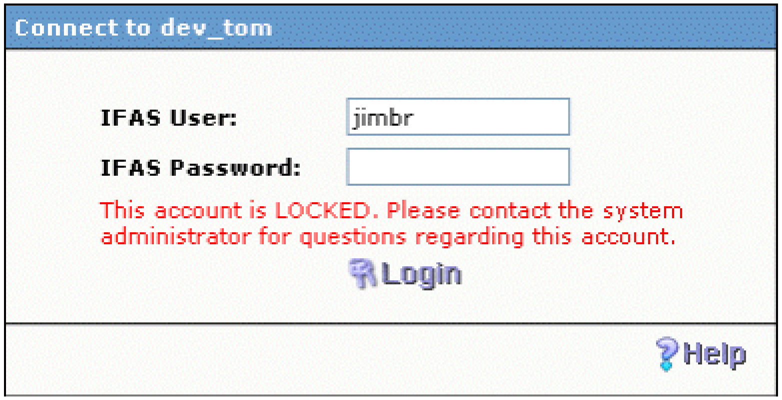
Password Expiration (days before password change is required):

This setting limits the number of days a password may be used before it must be changed by the employee. The login process checks the number of days since the Last Password Change and compares this to the Password Expiration amount – if the amount is exceeded, the user will be prompted to change their password upon the next successful login. A value of 0 disables this restriction.



Lock Account:

Changing the user's status to 'L' locks the employee's account. The employee will no longer be able to log into the system until the status is reset to active by an administrator.



4. Additional Password Restriction

Including password complexity requirements, password re-use limits, and maximum failed login attempts are configured via the NUPW/VALIDATE common code. Please refer to common code setup section

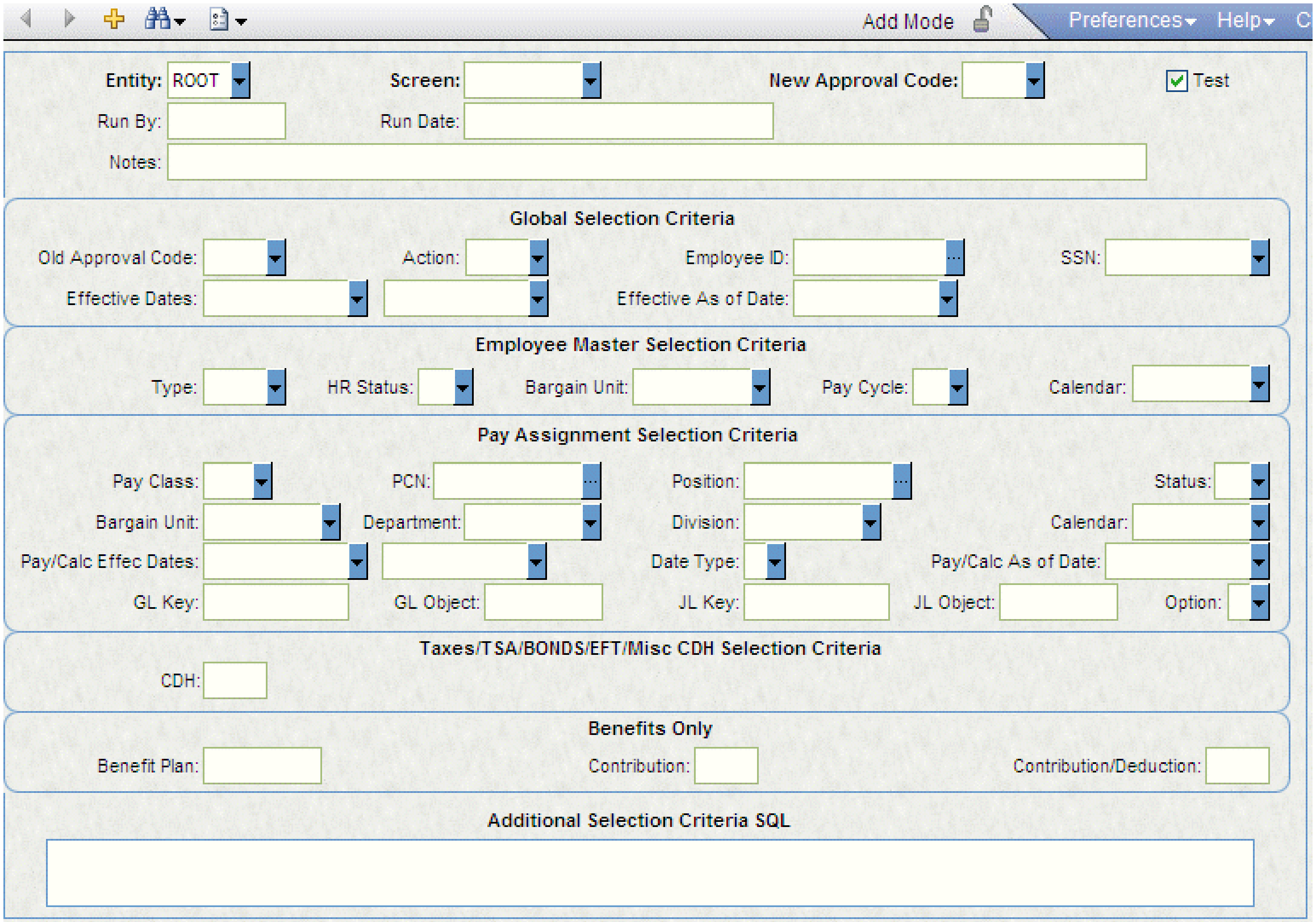
5. HR Approval Utility (HRUTAU)

The Approval code utility screen is used to globally update approval codes based on selection criteria. Based on the value selected in the screen selection combination, the utility will updated approval codes for the follow screens:

Screen	Mask	
Employee Master	HREMEN	
Taxes	HRPYMD	
Employee Pay Assignments	HRPYPA/QP	
CDH Assignments	HRPYCA	Misc, Direct Deposit, TSA and Bonds Tabs

The records to be updated are filtered based on the criteria specified in the global selection criteria section, which is applicable to all the functions. Function specific filtering has to be entered in the section specific to the screen. The processed records are logged and can be viewed on the Approval list screen which is accessible via the link on the Approval utility screen. Utility can run in test and actual mode. In test mode, function specific records are not updated; they are just logged in the approval list table.

This utility will run only in add mode and does not have a test mode.



3 Employee Online Mapping

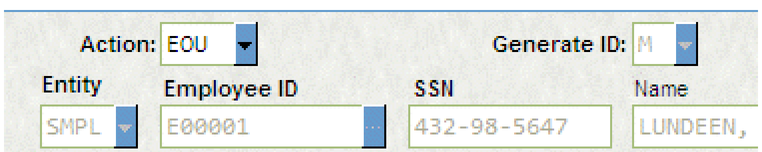
EO screens read information form the HR subsystem. When a non benefit change is made on EO it will map to the related HR subsystem screen and update HR screen with the appropriate EO action code (EOU, EOA, or EOC).

EO Screen	**Displays from**
EO Employee Directory	HREMEN
EO Home Address	HREMEN Address Info Tab and HREMPR Additional Addresses
EO Emergency Info	HREMPR Emergency Tab
EO Family Info	HRPYBE Family Tab
EO Direct Deposit	HRPYCA Direct Deposit Tab
EO Savings Bonds	HRPYCA Bonds Tab
EO Deferred Comp	HRPYCA Tax Sheltered Annuities Tab
EO Pay Stub	HREOTR EO Employee Info/Check Stub
EO Tax Info	HRPYMD Primary Taxes Tab
EO What If	Execution of Payroll Force Calc
EO W2	Documents Online W2 data
EO Current Job	HRPYPA
EO Historical Jobs	HRPYPA records

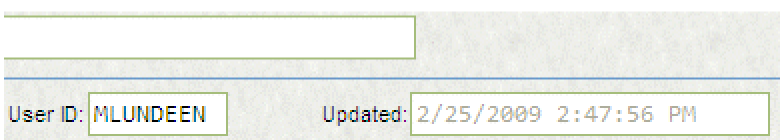
EO License/Cert	HREMES License/Certifications Tab
EO Skills	HREMES Skills Tab
EO Courses	HREMES Course Units Tab
EO Tuition	HREMES Tuition Tab
EO Education	HREMES General Tab
EO Training	HREMES Training Tab
EO Term Life Insurance	HRPYBE Term Life Insurance Tab
EO Administrator Settings	Various EOCD Common Codes

3.1 Non-Benefit Change Request Mapping

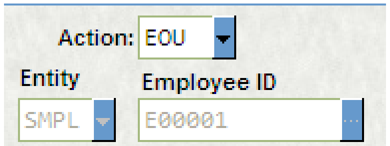
An employee makes and saves a new change, the record is accepted and the status on the record changes to pending.



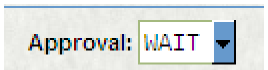
EO marks the corresponding HR record(s) with the employee's user name.



EO also places a value of EOA (for add), EOU (for update), or EOC (for close) in the action code. EO generated records have a value of 'WAIT' in the approval code.



These traits make it easy to QBE (query) for records which have been generated by Employee Online. While in 'WAIT' mode, the user's request is visible in HR but is not sent to the PY database.



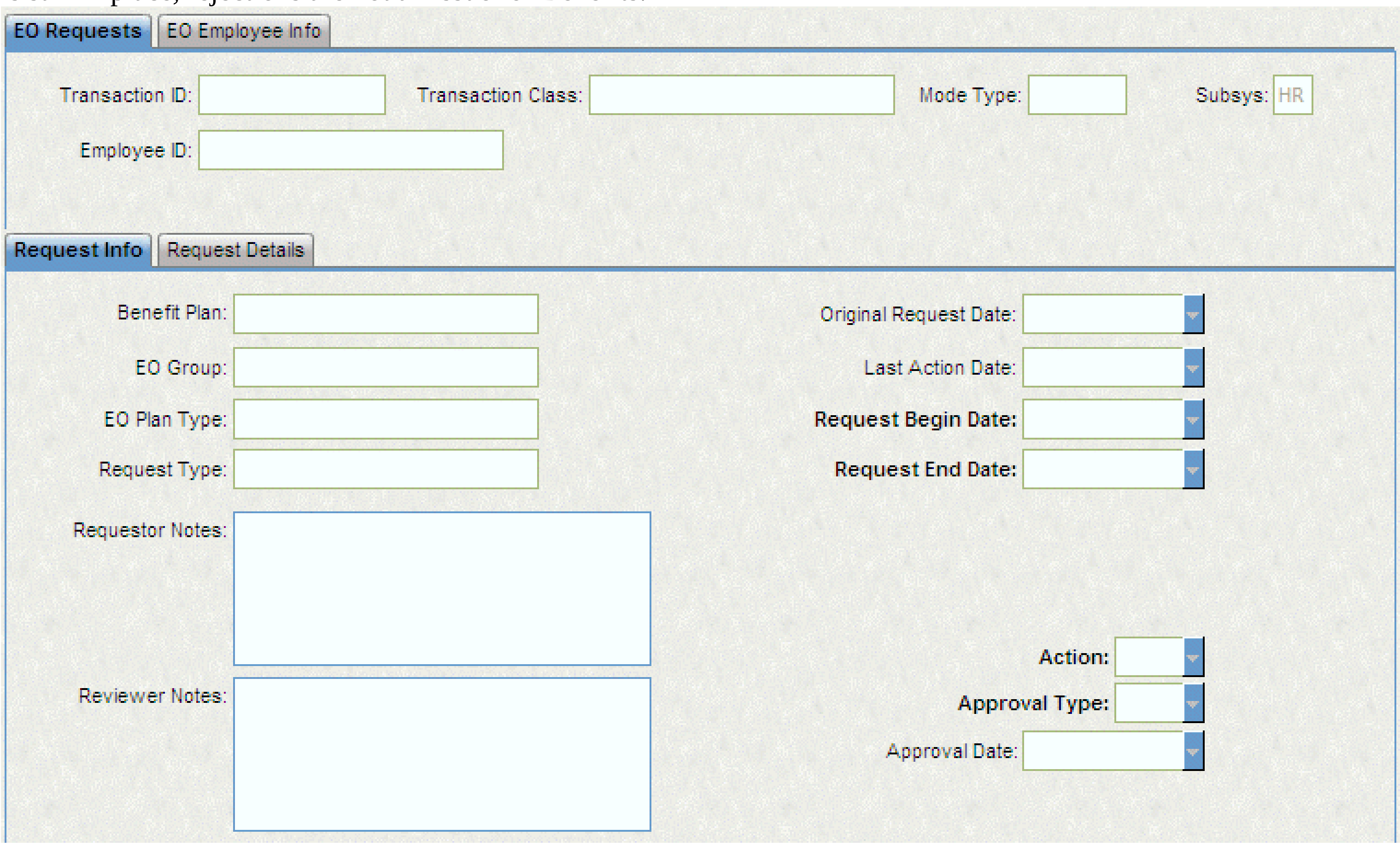
HR/PY personnel must reject or approve an EO request. Approvals are accomplished by changing the 'WAIT' to 'SEND' on the record and pressing 'Enter'. This action will fire the transaction codes for that screen and send the appropriate information to payroll.

Rejecting or modifying a request entails adjusting values on the record to acceptable values.

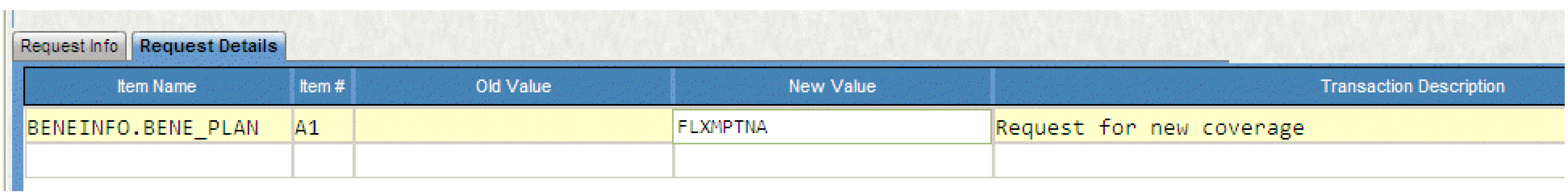
This implies that logging should be turned on for all tables associated with EO.

3.2 Benefit Change Requests Mapping

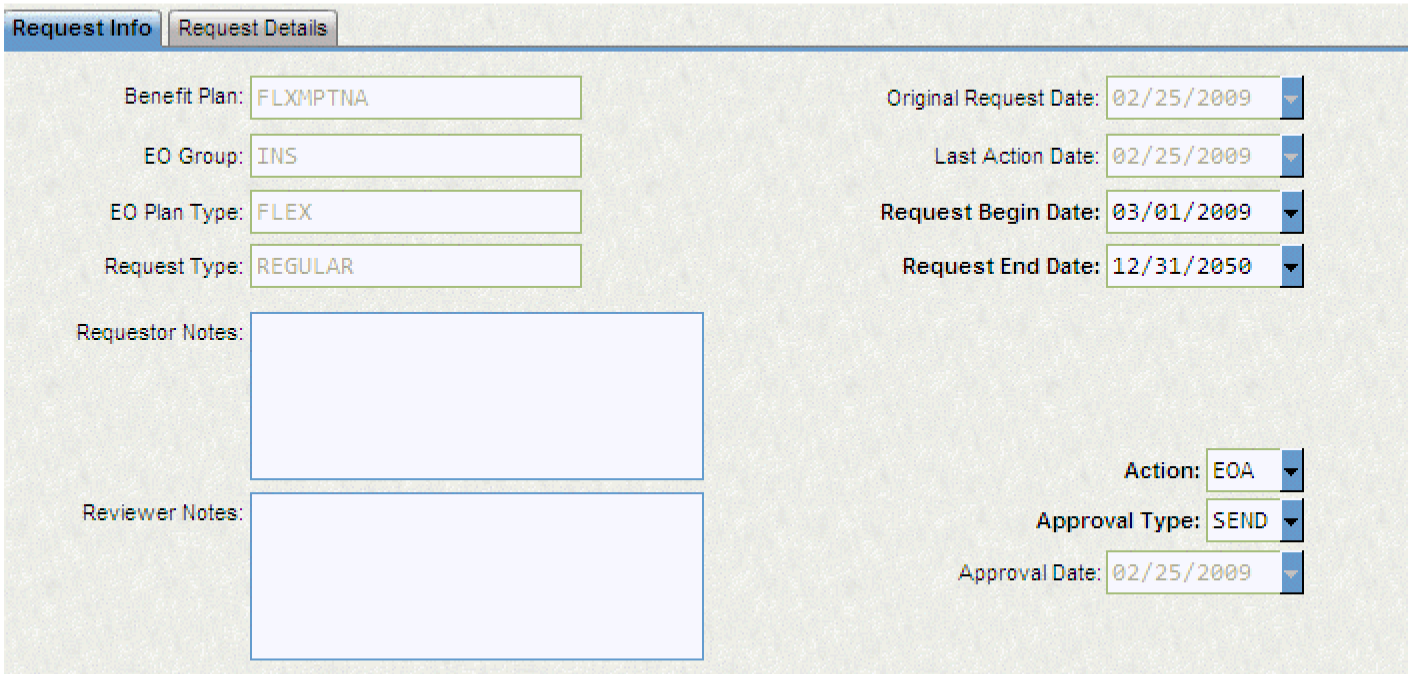
EO Benefit requests are written to an EO transaction screen (HREOTR) under EO Requests tab. The EO transaction screen allows an approver to evaluate a request and carry out an approval on a single before it reaches the BENEINFO screen. Since the original BENEINFO information is still in place, rejections are not an issue for Benefits.



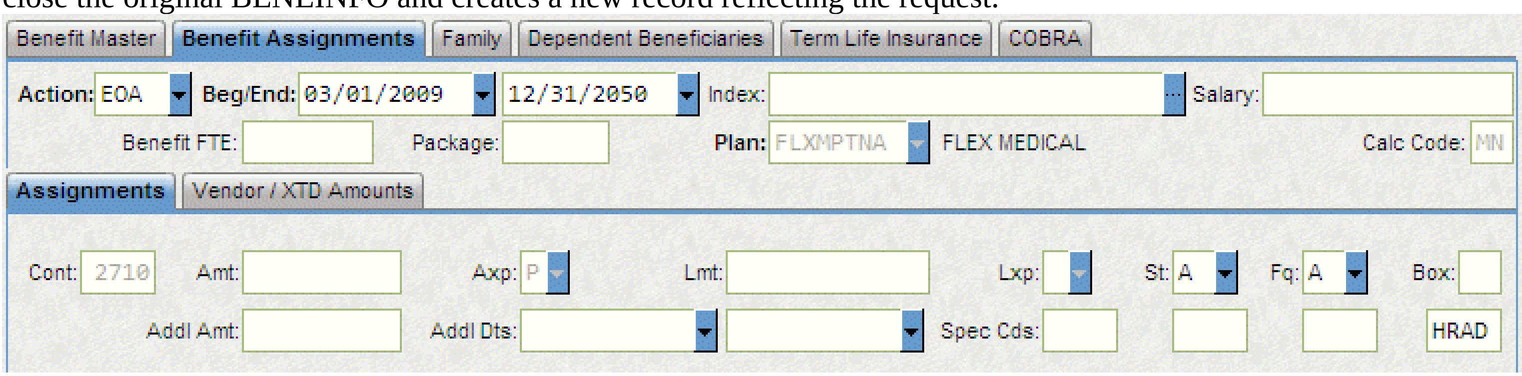
he request from EO will display on the Request Details tab.



The original benefit information is left untouched on the BENEINFO or CDHASSGN screens until the request is approved on HREOTR under Request Info tab. Approval is accomplished by placing 'APPR' in the approval code and pressing enter then status is changed to send with an approval date.



This action signals the approval business rules to execute. In the case where the Benefit maps to a BENEINFO record, the transaction codes close the original BENEINFO and creates a new record reflecting the request.



In the case where the target benefit maps to a CDHASSGN (which can only occur once for a given employee and CDH number) the CDHASSGN record is modified with the new request information and marked with the appropriate begin date.

Approval on the transaction screen also manages entries in the DEPDBENF table if necessary and moves the new benefit information over to PY for use in payroll calculations.

3.3 Frequent Asked Questions (FAQs)

What happens when an employee makes a change or addition to benefit plans in EO?

All benefits requests are written to this table with an approval code of WAIT. You can see more details about the request by putting a Y In the See Details field. After the cutoff date or open enrollment period ends, you would approve the TRNSREQS by placing APPR in the approval field. This will write the benefit into BENEINFO as well as sending it directly to PY. Once it finishes successfully the approval code changes to SEND. All EO approvals should happen after the cutoff date.

How do I launch PDF forms in a separate window?

If you put target="_new" in the anchor it will cause a new window to open…

 url text

How do we handle benefits that don't address who is covered?

EO requires each plan to be mapped to a category that indicates coverage type. If there are multiple plans that do not have any concept of coverage levels the file jsutil.txt in employeeonline/include must be updated to reflect this. This will also make the plan description from BENETBLE show as the description in employee online instead of the category.

Is there a max number of records that can be entered in EOBEMSTR?

Currently this is set at 40 in the file beneutil.asp in employeeonline/include. To increase it open this file, search for all occurrences of 40 and change to a higher number. This will need to be updated after updates though.

How does Employee Online know whether a direct deposit is a net, flat, or percent amount?

You need to indicate with the Special Cd 1 field on HRPYCA whether that direct deposit is a P (percentage), A (flat amount), or N or blank (net amount). Then in the EOCD / DIRDEP common code you can define how EO should display and treat these codes.

Also, this should be used in order to tell Payroll whether direct deposits are percent, net, or flat amounts. Below is the calc code that you can use on your direct deposit deduction definitions to calculate this in payroll:

```
<< EFT Calculation Code >>

<< Based on Special Code{1} determine deduction amount >>

<< P = Percent  A = Flat Amount  N or blank = Net >>

IF EDED.CD{1} = "P"

  NVAR0 := EDED.AMT * PBSX.PTD

  ROUND2(NVAR0)

ELSE

  IF EDED.CD{1} = "A" AND EDED.AMT > 0

    NVAR0 := EDED.AMT

  ELSE

    IF EDED.CD{1} = "N" OR EDED.CD{1} = " "

      NVAR0 := PBSX.PTD

    ENDIF

  ENDIF

ENDIF
```

DEDX.AMT := NVAR0

Is Employee Online in compliance with the IRS Electronic Signatures?

Yes, our product team has reviewed the requirements and believes that we are in compliance with the IRS regulations. If you have concerns about your agency's compliance, we encourage you to get pre-approval of your online change procedures from your legal department.

Does employee online keep a record of the change history?

When a change is made from Employee Online ONLY for benefits, a transaction record number is created for the changes on the HREOTR screen and that is where the changed information history will reside.