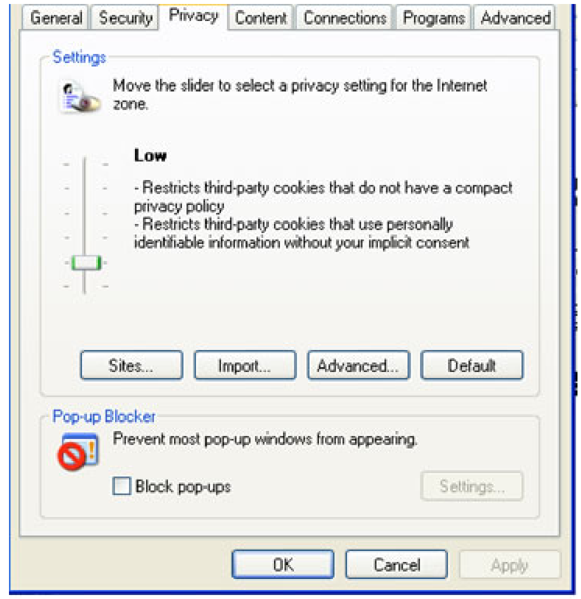
Inflection HR Workforce Portal

First Time Users Guide

Common Uses Guide

Before you Login

Note: You Must Enable Cookies to allow this program to work. To Enable Cookies on your web browser:



1. From the Tools Menu in IE, Select Internet Options
2. On the Privacy Tab Make Sure your the slider bar is set to Low.

Logging into and Exiting from the Web Application

Use the login page to access the Web application. If you have access to more than one master company, you must select a master company, and possibly, a component company. If you belong to only one master company (context), but there are multiple component companies in the master company, you must select a component company.

You can exit from the Web application at any time. If you share your computer with other users, you should always log off when you are finished using the computer so that the other users cannot see your information. This is especially true if you are using the application in a kiosk environment.

If you accidentally logged out and need to log back in again, wait a few seconds for the browser to clear out the login information.

Note: If the login page displays with a **Forgot my password** link at the bottom right corner of the page, Web users can click on the link to display the **Password Hint** page, which contains text that reminds them of their passwords.

To log into the Web application:

1. Go to **http://www.inflectionhr.com** Select the Login button from the top of the screen
2. In the login window, enter your user name and password.
    i. Your Username = your last name and first inital (e.g. smithj)
    ii. Your Password = your date of birth no dashes, or spaces. The format is 2 digit month, digit day, 4 digit year (i.e. 01/01/1960 is 01011960).

Note: If the login page displays with a **Forgot my password** link at the bottom right corner of the page, Web users can click on the link to display the **Password Hint** page, which contains text that reminds them of their passwords.

3. Click the **Log in** button. If you are accessing the utility for the first time, the **Change Password** window displays. Enter your old password, enter your new password, re-enter your password to confirm it, then click **OK** to save the changes.
4. If you receive a Access Denied Message on the Screen, refresh the browser page, or close the web browser and log back in.

To exit from the Web application:

1. On the menu bar, click the **Log Off** link.
2. Click **Yes** to confirm that you want to close the browser window and log off.

Application Overview

This Web-based self-service application lets users perform common human resource and payroll tasks from the Internet or a company intranet.

The application gives employees access to pay history, benefits, company information, and more. Employees can quickly accomplish routine activities such as updating direct deposit account information or making benefits choices by routing standard change requests to other users.

Administrators and managers can use the reporting tools to analyze workforce trends in areas such as overtime, turnover, and recruitment. They can also perform activities relating to employee administration; for example, they can add a new employee; change an employee's primary job/position; change an employee's salary or organization; and change an employee's status. They can also view employee information.

Users can view the home page, company information, a training schedule, and available jobs; access electronic forms; use the employee directory; and (if available) make benefit changes related to a specific life event. They may also be able to submit requests to add or change data, enroll in training classes, apply for jobs, and cancel class enrollments.

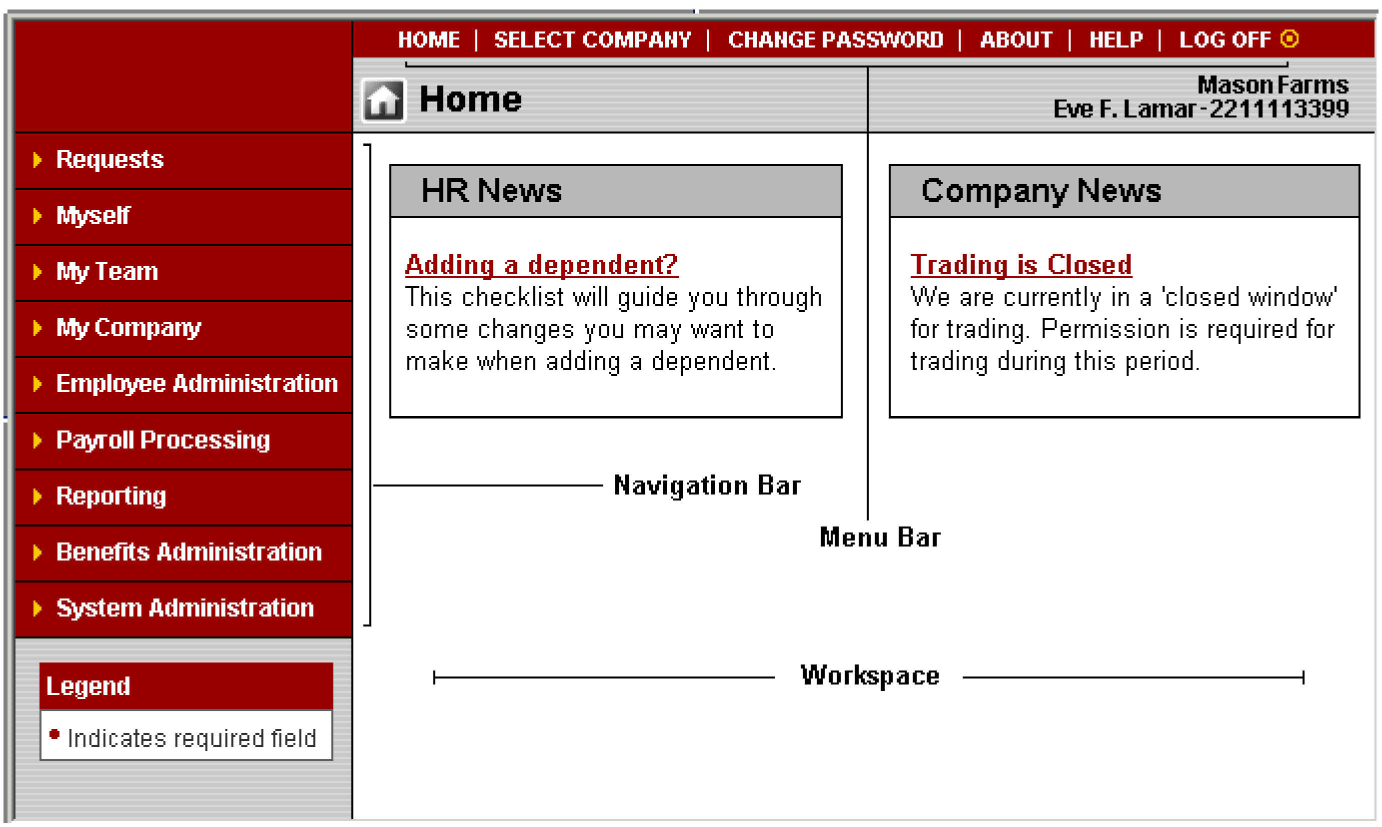
Working with the Application

The application desktop consists of the following items:

menu bar

navigation bar

workspace



Menu Bar

The menu bar runs along the top of the desktop and includes the following links:

- **Home** - Select this link to **view the home page**. The page contains links to HR and company news. Your administrator customizes these links to be specific to your company.
- **Select Company** - Select this link to choose another company. The selected company name always displays in the upper right corner of the desktop. When Web pages display in the workspace, the page content will correspond to the company you selected.
- **Change Password** - Select this link to **change your password** at any time.
- **Help** - Select this link to access online help topics that tell you how to complete tasks in the application. For more information about this topic, refer to **Using Online Help**.
- **About** - Select this link to view information relating to this application, including the release version, date, and copyright statement.
- **Log Off** - Select this link to **exit from the application** and return to the **Login** page. Do not select the **X** in the upper right corner of the browser window to exit from the application as this may create unexpected results, especially when updating information.

Navigation Bar

The navigation bar is located at the left of the desktop. Divider bars group the application's features into related categories. Beneath the divider bars are menu and sub-menu items that take you to corresponding pages and buttons in the application. You use the pages to complete tasks in the application.

The appearance of specific dividers on the navigation bar and your access to the items (menus, pages, and buttons) and processes beneath the dividers is determined by the features your company purchased, installed, and registered; your position(s) in the organization; the type of Web user role(s) you are assigned; and the access rights your administrator gives to your assigned Web user role(s).

Administrators can add custom dividers and menus to the nagivation bar. They can also rename the system-delivered dividers and menus.

Workspace

The workspace, which is located in the center of the desktop, is the main area that you work in when completing tasks in the application. When you select an application Web page from a menu or sub-menu located on the navigation bar or link to a Web page from a menu option or another Web page, the page displays in the workspace.

You use the application's Web pages to complete various tasks in the system, including viewing, adding, changing, and deleting information. Many of the pages contain links and buttons that take you to other pages in the application. Links may display documents and forms made available by your company, take you to an internal or external Web site, or enable you to send an e-mail message.

Related information is often grouped on page "tabs." You can click on the tab name to navigate to the tab. If the tab name is truncated, click on the next or previous icon located at the end of the tab row to display the hidden tab. For example, clicking the next icon will display the **Other** tab:

Some general tasks that you can complete on Web pages and tabs include:

- sorting a list
- searching for information in a list
- paging through a list
- saving information on Web pages
- printing Web pages
- viewing your progress
- finding an employee or supervisor

Sorting a List

On many pages, you can sort the contents of a column of information by clicking on the arrow icon located next to a column heading.

The arrow icons appear to the right of any column that is sortable. An up arrow (see example below) indicates an ascending sort (A-Z or 0-9), while a down arrow indicates a descending sort (Z-A or 9-0). A left arrow indicates the column is not sorted.

If there are multiple pages of information, sorting a column will affect the sort order on all of the pages, not just the information on the current page.

Searching for Information in a List

If a list appearing on a page contains multiple entries and you want to quickly search for a word or phrase that you know appears in the list, you can use the Microsoft Windows "Ctrl-F" feature. In the list you want to search, press the **Ctrl** and **F** keys to display the **Search** window. Enter a word or phrase, select any options to limit the search, then click **Find Next**. (Note that this searches the displayed list only. If the list continues to subsequent pages, you may need to search each page.)

Paging Through a List

Some Web pages contain many listed items. To avoid having to scroll through one long list, you can use the paging feature to move through the list. The **Previous** and **Next** links (see the example below) move you between the pages containing the listed items. The page number links take you directly to the selected page. The page number of the active (current) page is bolded and underlined.

Page 1 2   < Previous Next >

Saving Information on Web Pages

When working on an application Web page, remember to save or submit your changes before closing the page. If you make changes to a page and do not submit or save the changes prior to clicking the **Close Window** button, the browser window will close and your changes will not be saved. You will not see a message reminding you to save your changes; this is standard behavior for Web applications.

Do not select the **X** in the upper right corner of the browser window to close the page as this may create unexpected results, especially when updating information. Note also that your changes will be lost if you click on another page, tab, or menu item prior to saving or submitting your work.

You should always use the navigation controls (the **Return to previous page** link and the **Cancel** button) in the workspace rather than the browser controls (the **Back** and **Forward** buttons). Using the browser controls may take you several pages back from your current location and you may lose the work you've already completed. In addition, using the **Back** and **Forward** buttons in your browser may lead to undesirable/unpredictable results.

If you receive a **system message** when you try to save or submit a page, there is either a problem with the information you entered or the system is having trouble processing the information.

Printing Web Pages

There are four ways to print an application Web page:

- If available, click the **Printer-Friendly** icon appearing on the Web page to display a formatted version of the page. Then, click **Print** to print the page, or click **Return to previous page** to go back to the page containing the **Printer Friendly** icon. (The navigation bar and browser frames will not appear in the printed copy.)
- Click the **Print** icon on the toolbar at the top of the Web browser window.
- Select **Print** from the **File** menu and complete the **Print** window.
- Right-click on the page, select **Print** and complete the **Print** window.

Viewing Your Progress

When a task requires you to work with two or more Web pages, you'll see a progress indicator at the top of each page used to complete the task. The headings on the indicator relate to the pages in the task and reflect different states of progress:

- A black heading on a gray background means the page is in an active (current) state
- A dark gray heading on a light gray background means the page is in a visited (completed) state
- A dark gray heading on a white background means the page is in a future (still remaining) state

The headings on the progress indicator vary depending on the task. The example below (from the standard reports pages) shows that you have selected a report type, are on the page to enter report criteria, and still need to supply report details.

You cannot click on the indicator headings to move from page to page.

Using Online Help

The online help topics tell you how to complete various tasks in the application. For example, submitting a change to your address or viewing your emergency contacts.

The online help also contains general information about working with the application. For example, printing Web pages, sorting lists, searching for names in a list, and so on.

You can obtain online help for any page or tab in the application by clicking the **Help** link on the menu bar. (If a pop-up window contains a **Help** link, you can click on the link to display the online help.)

The online help topics display in a separate browser window. You can resize, maximize, and minimize the help window as desired.

The main viewing area of the help window displays the help topic text. The **Related Topics** area at the top of the help window contains links to other topics of interest. The menu bar at the top of the online help window contains links to the following:

- The **Search** option displays the **Search** page so that you can locate a word or phrase appearing in one or more help topics. For example, entering the word "benefits" displays a list of help topics containing that word.
- The **Print** option lets you print the displayed help topic.
- The **Back** option lets you return to previously displayed help topics.
- The **Close Window** option closes the help window.

You can also right-click on any help topic to print the topic or return to a previously displayed topic.

Several help topics contain a **Take a Tour** button. Selecting this button launches a features overview that relates to the Web page associated with the displayed help topic.

To use online help:

1. While viewing any Web page or tab, click the **Help** link on the menu bar. (For a pop-up window, click the **Help** link at the top of the window.) The help topic that corresponds to the Web page or tab that you are viewing displays in the upper left corner of your screen.

Notes:
If the "No Help Available" help topic displays, there is either no help available for the Web page or the system failed to locate the corresponding help topic. Try to access the online help system from another Web page in the application or use the help search feature to locate an applicable help topic.

When a standard report displays in the Adobe Acrobat Reader plug-in, selecting the **Help** link on the Web application's menu bar will display the "No Help Available" topic. This is because you are now working within the Acrobat Reader application and not the actual Web application. If you are looking for detailed information about a specific report, refer to the *Standard Reports Guide* on the Documentation CD. If you are looking for basic report definitions, refer to the **Standard Report Definitions** help topic. If you are looking for information about working with Adobe Reader, refer to that application's online help system.

2. Optional: Do any of the following:

- To locate other help topics of interest, click the **Search** option on the help menu bar, then enter the word or phrase that you want to search for and click **Go**. When entering search keywords, remember to put phrases in quotes (for example: "business rules"). Then, scroll through the **Search results** area to locate the topic you want to view, and click on the topic to display it in the help window.
- Use the help menu bar options to navigate to previously displayed help topics or to print a displayed topic.
- Click on a related topic link to view an associated help topic.

3. To exit from the help system, click the **Close Window** option (or, click the **X** in the upper right corner of the online help browser window).

Changing Your Password

Use the **Change Password** page to change your password at any time. This page appears when you:

- initially log into the system
- log in after having your password reset
- select the **Change Password** link from the top navigation bar

If your site administrator enabled the use of "password hints," this page will contain a **Password hint** field. Use this field to enter text that will help you remember your login password. If you forget your password when logging into the Web application, you can select the **Forgot my password** link at the bottom right corner of the **Login** page and view your password hint on the **Password Hint** page. If there is no **Forgot my passwork** link on the **Login** page, the use of password hints is not available to you.

To change your password:

1. On the **Change Password** page, enter your old password and new password; then re-enter your new password to confirm it.
2. If available, enter a password hint that will help you remember your login password; for example, "The name of my cousin's dog." Your password hint cannot contain your password.
3. Click **OK**. A confirmation message appears. Remember to use your new password when prompted.

To get to this page:

- From the top navigation bar, click the **Change Password** link.

Viewing Pay History

Use the **Pay History** tab to view your pay statements. You can also use this page to access detailed information about pay statements.

> **Tip:** If you plan to print the pay statement, make sure your printer is set to landscape (not portrait) mode.

To view pay history:

1. Optional: On the **Pay History** tab, to filter the list to show pay statements that were issued during a specific period, enter a pay start and end date, then click the **Display** button. The list will then be filtered according to the date range you specified.
2. To view detailed information about a specific pay statement, click on the corresponding date in the **Pay date** column.

To get to this page:

- From the **Myself** divider, select **Pay** to display the **Pay History** tab.

Viewing Employee Form W-2

Use the **Employee W-2 View** page to view all Form W-2s you have filed with the Social Security Administration (SSA). Form W-2, *Wage and Tax Statement*, reports wages, tips, and other compensation paid to an employee. It also reports the employee's income tax and social security taxes withheld and any advanced earned income credit payments.

Forms filed prior to the year 2003 are not displayed.

To view the Form W-2s:

1. From the **Year** column, select the year link for the form type you want to view.
2. Optional: Do any of the following:

- If you select the "Form W-2 link" at the top of the page, the **Sample Form W-2** page displays a sample Form W-2 for the current year.
- If you select the **Notices and instructions** icon, the instructions found on Form W-2 display in Adobe Acrobat Reader.
- If you select the **Change** button, the **Employee W-2 Consent** page appears. From this page, you can select whether you want your Form W-2 issued electronically only or if you also want your employer to mail you a paper copy of the form.

To get to this page:

1. From the **Myself** divider, select **Pay**.
2. Select the **W-2** tab.

Adding Direct Deposit Accounts

Use the **Direct Deposit Detail** area on the **Direct Deposit Summary** tab to add the bank accounts into which you want your pay deposited every pay period.

When adding direct deposit accounts, specify whether you want to deposit:

- a dollar amount
- a percent amount
- an available balance

> **Important!** If you want to set up a new account to deposit the balance of your net wages and you already have another account set up to deposit the balance of your wages, you must first delete the current balance account and then add the new balance account. You cannot have two accounts set up at the same time to deposit the balance of your net wages.

To add direct deposit accounts:

1. In the **Direct Deposit Detail** area on the **Direct Deposit Summary** tab, enter the American Bank Association (ABA) routing number assigned to your bank. If this is a checking account, the routing number is the first 9-digit number on the bottom of your personal checks; if you are setting up a savings account, you may need to contact your financial institution (bank or credit union) to verify the routing number.
2. Specify whether the you want a dollar amount or a percentage of the net pay amount deposited into this account. You can have the entire net pay amount deposited into this account by specifying a percentage and then entering 100% as the deposit amount.
3. Indicate whether this is a checking or savings account.
4. Enter your account number. This is displayed on the bottom of your personal checks.
5. Enter the amount you want to be deposited into this account:

- If you want a percentage of the net pay amount, enter the percentage amount.
- If you want a dollar amount, enter the dollar amount.

6. Click the **Submit** button, then click **OK** twice (to confirm you want to submit the changes and to acknowledge the submission of your request). If approvals were established for this request, the **Approvals** page will appear so that you can **submit the request for approval**.

To get to this page:

1. From the **Myself** divider, select **Pay** to display the **Pay History** page.
2. Select the **Direct Deposit Summary** tab.
3. Click the **Add direct deposit** button to display the **Direct Deposit Detail** area.

Changing Name, Address, or Telephone Information

Use the **Name, Address, or Telephone Add/Change** page to change your name, address, and telephone information.

After you complete this page, the system first checks to see if approvals were established for the request and then checks to see if the request is to be future dated. (Future dating must be enabled by an administrator using the Site Administration utility.) Future dated requests are change requests that have been approved by reviewers but have an effective date in the future. When the request is future dated, the request is applied to the system on the first day of the pay period in which the effective date of the future-dated request falls. If the pay calendar has not been established/extended for the effective date entered, you will be prompted with a message. You will need to do one of the following:

- Click **OK** to accept the future dated request and make it effective immediately upon approval.
- Click **Cancel** to cancel the request and notify your payroll administrator who can extend the pay calendar.

If the future dating flag has been selected, the statement at the bottom of the page will read, "This change is effective-dated." If the future dating flag has not been selected, the statement will read, "This change is effective immediately upon approval."

To change name, address, and telephone information:

1. On the **Name, Address, or Telephone Add/Change** page, change any applicable address and telephone information.
2. Optional: Indicate whether you want your home phone number to be kept private. Selecting this check box means your home phone number will not appear in the employee directory.
3. Optional: If available, enter an address for your wireless device (for example, a PDA) and indicate whether you want to receive pay notifications and change request approval notifications on your wireless device.
4. Click the **Submit** button, then click **OK** twice (to confirm you want to submit the changes and to acknowledge the submission of your request). If approvals were established for this request, the **Approvals** page will appear so that you can **submit the request for approval**.

To get to this page:

1. From the **Myself** divider, select **Personal**.
2. Select the **Address** tab and then click the **Change Name, Address, Telephone** button.

Viewing Paid Time off Information

Use the **Paid Time Off** tab to view the amount of paid time off you have earned and taken, how much paid time off you currently have available, and your approved paid time off requests.

To view paid time off information:

1. On the **Paid Time Off** tab, view information relating to your paid time off benefits.
2. In the **Approved requests** section on the **Paid Time Off** tab, view information relating to your approved paid time off requests.
3. Optional: On the **Paid Time Off** tab, do any of the following:

- To request paid time off, click the **Add** button
- To change the dates or the total hours for an existing paid time off request, click on the name of the paid time off benefit type
- To delete an approved paid time off request you decide not to use or have already taken, select the request you want to delete and then click the **Delete** button
- To view/change your paid time off requests that have not yet been acted upon, click the **Requests - Pending** button.

To get to this page:

1. From the **Myself** divider, select **Benefits** to display the benefits **Current** page.
2. Select the **Paid Time Off** tab.

List of All Tasks Available to Employees

Where can I:	**Where can I do this on the Web?**
Manage my personal information	
View my personal information	Myself, Personal, Summary
Add a telephone number	Myself, Personal, Address
Change my name, address, or telephone number	Myself, Personal, Address
View my employee status	Myself, Personal, Status
View/Add a contacts	Myself, Personal, Contacts
View my property	Myself, Personal, Property
View/Change my EEO/I-9 information	Myself, Personal, EEO/I-9
View my other personal information	Myself, Personal, Other
Manage my job information	
View my job information	Myself, Jobs, Summary
View my compensation information	Myself, Jobs, Compensation
View my job history	Myself, Jobs, Job History
View my review history	Myself, Jobs, Reviews
View my other company information	Myself, Jobs, Other
Manage my career and education information	
View/Add a license	Myself, Career & Education, Licenses
View/Add a skills	Myself, Career & Education, Skills
View/Add a test	Myself, Career & Education, Tests
View/Add a previous job	Myself, Career & Education, Previous Employment
View/Add an awards	Myself, Career & Education, Awards
View/Add a school	Myself, Career & Education, Education
View my education information	Myself, Career & Education, Education
Add a school	Myself, Career & Education, Education
Manage my pay information	
View my pay history	Myself, Pay, Pay History
View my year to date information	Myself, Pay, Year to Date Summary
View my year to date information from the prior year	Myself, Pay, Year to Date Summary
View my direct deposit information	Myself, Pay, Direct Deposit Summary

Add a direct deposit account	Myself, Pay, Direct Deposit Summary
Remove a direct deposit account	Myself, Pay, Direct Deposit Summary
View my W-4 information	Myself, Pay, W-4
View my state and local withholding information	Myself, Pay, W-4
Manage my benefits information	
View my benefits	Myself, Benefits, Current
View my beneficiaries and dependents	Myself, Benefits, Ben/Dependents
View my investments	Myself, Benefits, Investments
View my paid time off	Myself, Benefits, Paid Time Off
View my COBRA status	Myself, Benefits, COBRA
Request PTO / Vacation	Myself, Benefits, Links
Manage my training information	
View/Change my class history	Myself, Training, Class History
Add a class	Myself, Training, Class History
View my required training	Myself, Training, Required Training
View my current enrollments	Myself, Training, Current Enrollments
Manage my job applications information	
View my job applications	Myself, Job Applications, Job Applications
View my interviews	Myself, Job Applications, Interviews
View my benefits enrollments	Myself, Benefits Enrollment
View my documents	Myself, Documents
View my company information	My Company, Company Info
View my company's electronic forms	My Company, Electronic Forms
View my company's employee directory	My Company, Employee Directory
View my company's open jobs	My Company, Open Jobs
Apply for an open job	My Company, Open Jobs
View my company's training schedule	My Company, Training Schedule
Manage my life events	
Enroll in/change benefit plans	Select any valid life event
Add/change personal information	Select any valid life event
Add/change personal information	Select any valid life event
Add/change contact, dependent,	Select any valid life event

beneficiary information	
Add/change dependent information	Select any valid life event
Remove a dependent	I want to remove a dependent
Change my marital status	Select any valid life event
Change my address/place of work	Select any valid life event