eCyborg

Interactive Workforce: The Administrators' Guide

Document Issue: 1.0

Document Issue Status:	First Release
Document Issue Level:	1.0
Document Issue Date:	July 2002
Software Version:	5.0

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Contents

Appendix C 213

PART 1

Part 1 - Introduction

In This Section

CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through implementing Interactive Workforce and performing all ongoing setup and administrative tasks. This manual has been designed as a reference document and can also be used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed for users who already have a working knowledge of Windows and experience using a web browser. We also expect administrators of Interactive Workforce to be familiar with The Solution Series. The following users will find the Interactive Workforce administrators manual most useful:

- **Members of the implementation team**
  The functional experts of the implementation team will find it helpful to read through the manual.
- **HR, payroll, and benefits functional administrators and the Interactive Workforce administrator**
  Functional administration of Interactive Workforce has been organized into functional areas. The Interactive Workforce, HR, payroll, and benefits functional administrators will find a chapter in the manual that addresses each of their particular tasks.
- **Functional support personnel**
  Anyone who will be supporting employees using Interactive Workforce will find helpful information on all aspects of Interactive Workforce functionality throughout the manual.

Prerequisite skills

Users of this manual should possess a variety of technical skills and authorities, depending on the roles they will perform. At a minimum, all Interactive Workforce functional administrators should have:

- basic knowledge of Microsoft Windows, PCs, and how to use a web browser.
- domain knowledge and detailed knowledge of your organization’s business processes. This is essential for any domain person involved in implementing Interactive Workforce
- detailed knowledge of your organization’s implementation of The Solution Series.
- experience using one or more of The Solution Series administration applications: HR, Payroll, or Benefits, depending on the role(s) they will perform.

Additional documentation and training courses

The following documentation is available from Cyborg Systems to help you use Interactive Workforce.

Documentation

Document	Description
Interactive Workforce: A Guide to Your Benefits Information	Provides an introduction to the features of benefits plans and describes how you: View your benefit enrollments Select beneficiaries and allocate benefits to them View flexible spending account balances Enroll in benefits online

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introduction	1–3	These chapters introduce Interactive Workforce and provide an overview of the system and how Interactive Workforce interacts with The Solution Series.
2. Interactive Workforce Administration	4-8	These chapters provide an explanation of the concepts and detailed directions needed to set up and use Interactive Workforce.
3: Appendices	A–C	The appendices provide troubleshooting information and include specific information on the relationship between Interactive Workforce and The Solution Series, a list of client error messages and their cause, and answers to review questions.

Following are descriptions of the chapters within the parts:

Part 1: Introduction

The chapters in Part 1 describe this manual and provide an overview of Interactive Workforce:

Read this chapter		To learn about
1	About This Manual	How the manual is organized, where to find what you are looking for, who should use the manual, and where to get help.
2	Overview of Interactive Workforce	The features included in Interactive Workforce.
3	Interactive Workforce and The Solution Series	How the system interacts with The Solution Series.

Part 2: Interactive Workforce Administration

The chapters in Part 2 explain the concepts and provide detailed directions for implementing and setting up Interactive Workforce for users.

Read this chapter		To learn about
4	Overview of Interactive Workforce Administration	Provides an overview of the role of Interactive Workforce Administrators.
5	Initial Implementation and Ongoing Administration	Gives conceptual information and detailed instructions for the tasks that must be performed by the Initial Administrator and the Interactive Workforce administrator.
6	Interactive Workforce HR Administration	Gives conceptual information and detailed instructions for the task that must be performed by the HR administrator.
7	Interactive Workforce Payroll Administration	Gives conceptual information and detailed instructions for the tasks that must be performed by the Payroll administrator.
8	Interactive Workforce Benefits Administration	Gives conceptual information and detailed instructions for the tasks that must be performed by the Benefits administrator.

Part 3: Appendices

The appendices in Part 3 provide troubleshooting information.

Read this chapter		To learn about
A	Relationship between Interactive Workforce and The Solution Series	Tables that show the source in The Solution Series of the information that displays in Interactive Workforce.
B	Error Messages	A list of error messages that includes the client-side error messages, the cause of the message, and the action the user must take to continue.

Read this chapter		To learn about
C	Review of Questions Answered	Answers to the review questions for instructional chapters.

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: *To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.*

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: *To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.*

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

Refer to a cross-reference to find more detail or more discussion on a given topic.

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Overview of Interactive Workforce

In This Chapter

Introduction to Interactive Workforce

Interactive Workforce is a member of eCyborg's family of web-based applications for human resources (HR) management. Cyborg Systems developed Interactive Workforce to integrate seamlessly with the best-in-class HRMS, The Solution Series.

Interactive Workforce is a web-based employee self-service application that gives employees real-time access to view, add, and update their personal information held within The Solution Series via a user-friendly, web-based interface. Interactive Workforce does not display the forms used in The Solution Series; rather Interactive Workforce presents web pages on which users view, enter, or update information. Commuication between Interactive Workforce and The Solution Series is performed via an application programming interface (API) that allows the two software applications to pass information to each other.

Components of Interactive Workforce

The functionality of Interactive Workforce is delivered in modules, allowing flexible implementation. Currently there are three modules:

- Interactive Employee
- Interactive Manager
- Interactive Benefits

Each module contains both the user functions and the administrative functions needed to perform the business processes specific to your organization. You can implement Interactive Employee independently of Interactive Manager and Interactive Benefits. However, if you want to use Interactive Benefits and/or Interactive Manager you must also implement Interactive Employee.

Interactive Employee

Interactive Employee provides employees access to their basic employee data. This includes:

- Personal details such as family member and emergency contact information
- Pay information and the ability to manage their direct deposit data if your organization supports this feature
- View and print forms required by the government or your HR department
- View of their time off balances

Note: *Some pages may be too wide to print in a portrait orientation. Remind users to change the print layout orientation to Landscape for printing these pages.*

Interactive Manager

Interactive Manager provides the following additional online functionality to managers and employees.

- Time Away Requests: Employees can user their web browser to request time away from work. This online request is routed to an inbox for the manager and/or the HR department for approval. When approved or denied, the request is routed back to the originating employee's inbox.

- Staff Member Information: Managers can view the personal, contact, and work information for their direct reports online.

Interactive Benefits

Interactive Benefits gives employees access to benefits related information such as their current benefit enrollments and beneficiaries. In addition employees can complete their enrollment in health and welfare benefit plans online.

Benefits of using Interactive Workforce

Some of the benefits of using Interactive Workforce include:

Employee information more current

Employees who own their data can control their data by updating personal information immediately without assistance. Information is as current as employees choose to make it.

Easier access to information for employees

Instant access to information is an important benefit to employees, particularly being able to review their pay information online. Employees can potentially access Interactive Workforce any time they want at work via the network. If they have access to their organization's intranet from remote locations, they can also access their information from home or another off-site location.

Easier benefits open enrollment

Using the benefits open enrollment functionality gives you immediate return on your investment. The level of HR staff involvement in open enrollment is reduced significantly leaving them to focus on the more strategic aspects of benefits administration.

Reduced paper costs

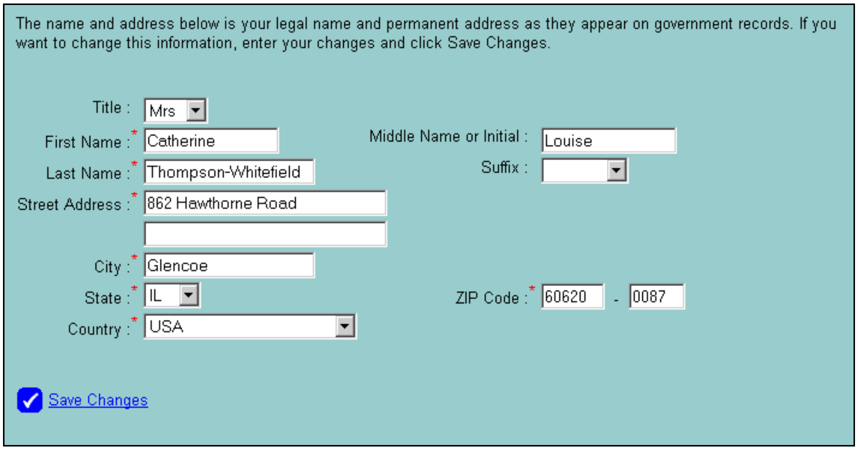
Online pay advice and open enrollment both have the potential to dramatically reduce the amount of paper issued by the HR department to the staff.

Ease of use

Cyborg Systems designed Interactive Workforce with ease of use in mind. We designed the interface specifically for employee users, recognizing that any workforce has a huge variation in computer skills. Designed for 'Day One' use means that any employee should be able to log on and use Interactive Workforce without any training. Guidance on every page helps the user explore and use the functionality. Some of the techniques we have implemented to ensure ease of use include the following.

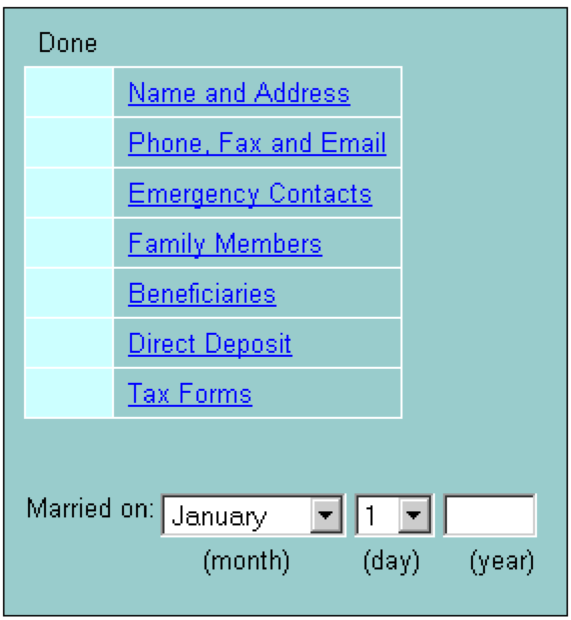
Instructional text on every page

Every page contains instructions to the user on the purpose of the page and what they need to do. Following is an example of instructional text.



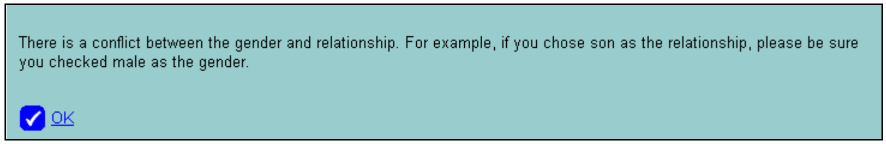
Checklists

Checklists used throughout Interactive Workforce guide users through processes they may not use very often, like the marriage and divorce checklists. As they complete each item on the checklist, the checklist displays their progress.



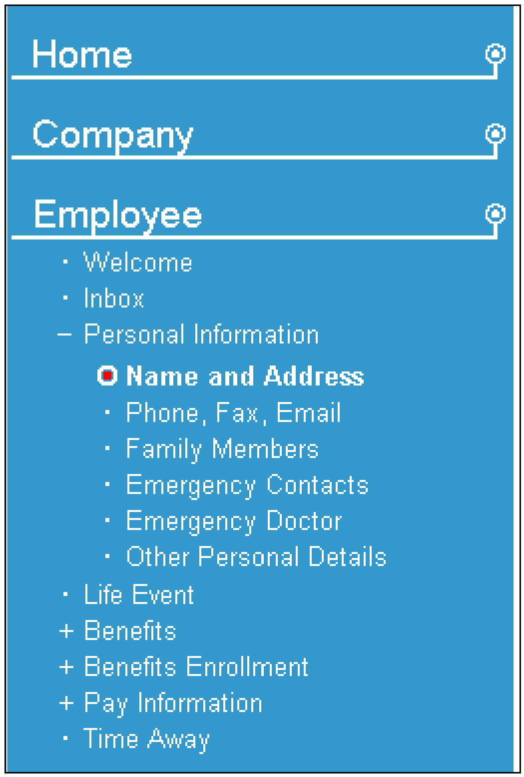
Helpful messages

If a user enters incorrect data, validation provides helpful messages to explain what is wrong and to advise the user on how to correct the problem.



The Navigator Pane

The Navigator pane clearly shows the available functionality. Following is an example of the functions available to an employee when Interactive Benefits is also installed.



Navigation buttons

Use of navigation buttons keeps the navigation options clear and simple. Some of the navigation buttons that display on pages include:

Button	Use
Back	Click this button from any page to return to the previous page and cancel any changes made.

Button	Use
Delete	Click this button to delete a record. (This is used on only a few pages.)
Save Changes	Click this button to save the changes made to a record.
Print Page	Click this button to print the Interactive Workforce page.
Log Off	Click this button from any page and log off the system.

Note: *Some pages may be too wide to print in Portrait orientation. For these pages users must access the Layout tab in the print dialog and change the orientation to Landscape.*

Easy to implement

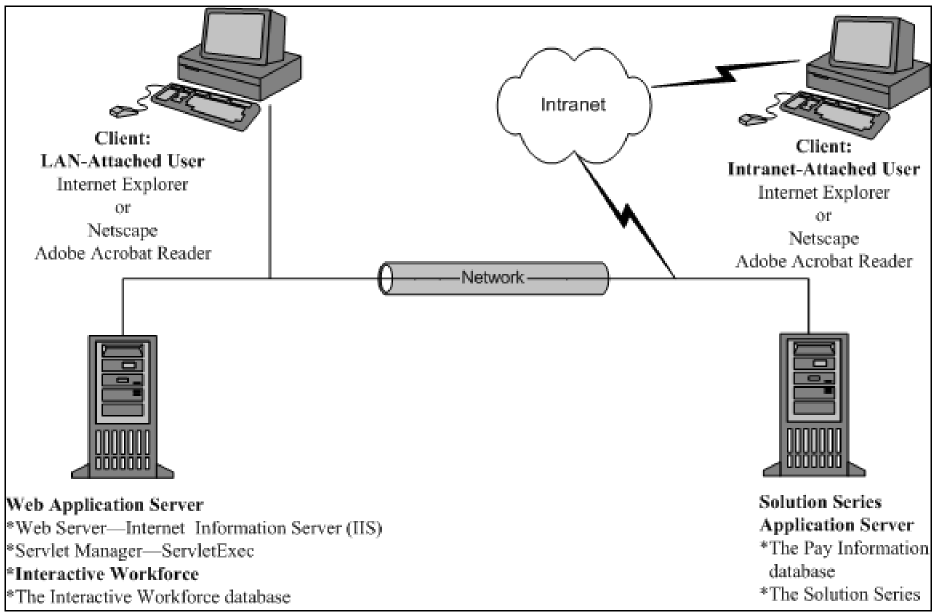
If you have already implemented The Solution Series, implementing Interactive Workforce is extremely easy. Because Interactive Workforce is fully integrated with eCyborg and uses all relevant setup in The Solution Series, minimal additional setup tasks are needed in Interactive Workforce.

The most time-consuming task is determining how you want to use Interactive Workforce in your organization and then re-engineering your processes.

Architecture of Interactive Workforce

How does Interactive Workforce retrieve data from The Solution Series and display the data on an Interactive Workforce page? How is the data entered into an Interactive Workforce page passed to The Solution Series? The main connection between The Solution Series and the Interactive Workforce pages is the STAPI. This is an API developed by Cyborg. STAPI facilitates communication between Interactive Workforce and The Solution Series. The following diagram, a typical installation of Interactive Workforce, shows the hardware and software components.

Note *The STAPI must reside on the same machine as The Solution Series.*



Views

The set of data available from The Solution Series is contained in a structure called ‘views’. Essentially, a view is a set of data fields used by the STAPI to map data fields between Interactive Workforce and The Solution Series. Every data field to be extracted from and displayed on an Interactive Workforce page must be included in a view definition.

A standard set of views is delivered in the STAPI configuration file (Stapi.cfg). Here is the view for the Emergency Physician page:.

View=Emergency Physician

Parent=16-SCR

Remove=FALSE

Query=TRUE

Insert=TRUE

Update=TRUE

AccessPanel=FALSE

Field=EMERGENCY-KEY

Field=EMERGENCY-PHYSICIAN

Field=PHYSICIAN-AREA-CODE

Field=PHYSICIAN-PHONE-NBR

Field=PHYSICIAN-ADDRESS-1

Field=PHYSICIAN-CITY-ST

Field=PHYSICIAN-ZIP-CODE

Field=PHYSICIAN-CITY-PROV

Field=PHYSICIAN-POSTAL-CDE

☞ *The Stapi.cfg file has other configuration parameters. Refer to the Interactive Workforce: Technical Implementation documentation for more information on this file and a compolete list of the delivered Views.*

CHAPTER 3

Interactive Workforce and The Solution Series

In This Chapter

Introduction

Interactive Workforce provides employees and managers with the functionality to perform a number of tasks online. These tasks include both entering and updating information that resides in The Solution Series applications: Benefits Administration, Payroll Administration, Human Resources Administration, and Position Administration. Therefore, to implement Interactive Workforce your organization must have certain basic information available in The Solution Series. The sections in this chapter show how Interactive Workforce interacts with The Solution Series.

Using Interactive Workforce will affect the processes you set up in The Solution Series. However, before you can determine the impact of implementing Interactive Workforce on your business processes, you must first understand how your organization currently uses the HR, payroll, and benefits functionality. You need to consider the flow of information that has moved from a paper-based system to an online system. For example, consider the paperwork involved today when an employee changes his or her marital status or an employee moves to another state. Using Interactive Workforce will eliminate much of this paperwork. We recommend that you change key business processes impacted by Interactive Workforce to capitalize on the functionality offered. This means looking at your:

- Processes
- Paper flows
- Rules—both contractual, company policy, and regulatory
- Authorization flows
- Reporting structures
- Organization charts

Doing this will help you understand the impact Interactive Workforce could have for your organization.

Revising your checklists

If you implemented the checklist feature in The Solution Series to link together forms and reporting into a business process, or if you use a manual checklist to make sure you complete all the necessary forms for a specific process, you need to review these checklists. If a form in your checklist is now completed by an employee online, remove the form from your checklist. Checklists should reflect only the forms completed by your HR, payroll, or benefits departments.

If you have not implemented checklists yet, you may want to consider creating some to complement the Interactive Employee process. For example, you could create a new hire checklist that includes all the core forms you need to complete before you give the new employee access to Interactive Workforce.

Field information in the appendices summarizes how the fields and related forms in The Solution Series correspond to the data displayed and entered via Interactive Workforce. Reviewing this information will help you understand the interaction between the systems and help you determine how you may need to alter your use of The Solution Series.

Employee Training

A vital component in the early phases of implementing Interactive Workforce is assessing the training needs of your user community. If you have primarily an office-based workforce who use PCs on a regular basis, the initial skills training need is small. However, if your workforce has a low level of computer literacy, you need to provide them with some basic computer training before giving them access to Interactive Workforce.

We designed Interactive Workforce assuming the following level of computer skills:

- **Basic Windows skills**—logging on, opening and closing applications, using scroll bars and drop-down option lists, tabbing between fields
- **Basic Browser skills**—launching and closing browser, understanding text and graphic that provide links to more pages, and using your intranet site

During implementation, be sure to address security concerns with users. Explain the function of user IDs and passwords. Employees must feel comfortable that users of Interactive Workforce will not be able to view any information but their own.

Interactive Employee and The Solution Series

Using Interactive Employee your employees can enter and change their personal and emergency contact information as well as maintain banking information for direct deposit of their company payments. However, you must first have entered some employee information into The Solution Series.

Minimum data required to use Interactive Workforce

Before you can give employees access to Interactive Workforce, you must set them up as employees within The Solution Series Human Resources Administration so that you can extract their user IDs and generate their passwords.

Therefore, before a new employee can access Interactive Workforce the following information must exist in Human Resources Administration for the employee:

- first and last name
- employee ID
- employment date
- ID of organization (Control 1-2s) to which the employee belongs
- status
- valid pay frequency

To log on to Interactive Workforce with a user ID, the user must have an active pay frequency on the Employee Information form (EF-SCR). This pay frequency is set up on the Company Pay Frequencies form (AJ-SCR) and used on the Payroll Run Process Control form (AE-SCR).

Once the information exists in The Solution Series, the following tasks must have been performed before employees can access the information online.

1. To load an employee's information into Interactive Workforce, an Interactive Workforce administrator must have selected the status and organization (Control 1-2s) to which the employee belongs when setting the parameters for the extract and load process.
2. A technical administrator must have run the extract and load process to extract user IDs and other employee information and generate passwords.
3. The employee must be notified of his or her user ID and temporary password.

Chapters within this manual provide concepts and detailed instructions for performing the preceding tasks.

Data for Interactive Employee

Users navigate to features of the system from the Navigator pane. The Employee area of the Navigator is divided into several major sections. The tables that follow show the functions available in each of these sections and how Interactive Workforce and The Solution Series interact when employees use these features.

Employee Details

Interactive Workforce Functionality	The Solution Series Functionality
Legal Name and Address	Employee Name and Address form (FF-SCR)
Mailing Name and Address	Employee Name and Address form (FF-SCR)
Phone, Fax, Email	Phone Numbers and Employment Information form (03-SCR) Employee Contact Information form (EM-SCR)
Family Members	Spouse/Dependent Information form (10-SCR)
Emergency Contacts	Emergency Contact/Physician form (16-SCR)
Emergency Doctor	Emergency Contact/Physician form (16-SCR)
Other Personal Details	Emergency Medical Information form (15-SCR)

Life Events

Interactive Workforce Functionality	The Solution Series Functionality
Marital Status	Additional Personal and ID information form (02-SCR)

Pay Information

The Solution Series payroll functionality must be implemented.

Interactive Workforce Functionality	The Solution Series Functionality
Pay Advice Current/History (Pay information database)	Created from new report generators run during payroll processing to extract and save data that is then loaded into the the Interactive Workforce Pay Information database.
Direct Deposit	Direct Deposit Information form (H9-SCR)
Reimbursement Account	Direct Deposit Information form (H9-SCR)

Time Away Balances

The Time Away balances are based on how your organization uses the Time Away Balances function in Human Resources Administration.

- If you use this function in Human Resources Administration but are not using Interactive Manager, you can give employees access to their paid time off information on the Time Away Balances page or you can disable the function.
- If you do not use this function, the Time Away Balances page is not populated.
- If you use Interactive Manager and the Time Away Request feature, the system updates these balances based on approved time away requests.
- You may want to customize this functionality within Interactive Employee so that it displays paid time off balances that you hold elsewhere in Human Resources Administration.

The table that follows shows where the Time Away balances in Interactive Workforce originate in The Solution Series.

Interactive Workforce Functionality	The Solution Series Functionality
Time Away Balances	Absences Entitlement form (93BSCR)

See also

- ***Appendix A: Relationship between Interactive Workforce and The Solution Series***

For a more detailed analysis of the data used from The Solution Series for pages of Interactive Workforce.

Maintaining Emergency Doctor Information

When a user accesses the Emergency Doctor page, Interactive Employee displays the information in the Emergency Physician fields from the Emergency Contact/Physician form (16-SCR). Using this form Human Resources Solution users can enter up to 999 Emergency Keys (records). Each record can hold both emergency contact and emergency doctor information. The Interactive Employee Emergency Doctor page displays only the information in record 001. Based on your organization's use of the 16-SCR, implementing Interactive Employee can have the following effect on your records:

- If your organization uses record 001 on the Emergency Contact/Physician form to hold information other than that of the employee's emergency doctor and you allow employees to enter/update their emergency doctor information in Interactive Employee, the information the employee enters will overwrite the existing information stored in the emergency physician fields in record 001. If you only allow employees to view the emergency doctor information, the employee will see information that is not their correct emergency doctor information.
- If your organization stores the employee's emergency doctor information in a record other than 001 on the Emergency Contact/Physician form (16-SCR) and you run reports based on your use of the Emergency Contact/Physician form, the report will not display the correct emergency doctor information for the employee.
- If your organization stores the employee’s emergency doctor information in a record other than 001 on the Emergency Contact/Physician form (16-SCR), using Interactive Employee your employees may be entering duplicate data that will be stored in the 001

record. To avoid duplicate data storage you may wish to purge emergency doctor data from records other than the 001 record on the Emergency Contact/Physician form.

Interactive Employee changes to Payroll Administration

The installation of Interactive Employee results in some changes to the Payroll Administration payroll process.

Changes to JPAYXTR and JPAYMRG scripts

Communication between Interactive Employee and Payroll Administration takes place using the Application Programming Interface (STAPI). During payroll runs the STAPI must be suspended to insure data integrity. To suspend and then restart the STAPI two scripts are modified during installation. The pay extract (JPAYXTR) script is modified to suspend STAPI, and the pay merge (JPAYMRG) script is modified to restart STAPI. In addition, Interactive Workforce provides a Suspend STAPI utility.

When the STAPI is suspended, users who are logged on cannot make changes to their data, new users will not be allowed to log on, and no new queries can be started. If an employee tries to log on to Interactive Workforce, the following message displays: 'The system is currently unavailable. Please try again later'. Once the STAPI resumes, normal operation resumes.

Modifications to JPAYRUN and JMNTRUN

Interactive Employee contains a Pay Information database with employee pay history. This database populates the Pay Advice History page and the Pay Advice Current page that employees view online. Every payroll run creates files to update the Pay Information database. To create these update files, JPAYRUN and JMNTRUN have been modified to include the Report Generators 7L7L, Pay Run Extract, and 7M7M, Payslip Extract. These report generators access the Employee Database (FILE02), extract the required data and save the data in four text files.

To run properly, each of these reports must also be set up in The Solution Series using the Report Requests form (DD-SCR). Interactive Workforce contains scripts the administrator then uses to pull data from the text files created by Report Generators 7L7L and 7M7M into the Pay Information database tables. These report generators access the Employee Database (FILE02) during the payrun processes and extract appropriate information into ASCII text files. These files are then loaded into the Pay Information database tables for use in viewing pay information in Interactive Employee.

☞ *Refer to Payroll Run Changes in the Interactive Workforce: Technical Implementation documentation for more information on configuring the reports.*

Note *To log on to Interactive Workforce with a user ID, the user must have an active pay frequency on the Employee Information form (EF-SCR). This pay frequency is set up on the Company Pay Frequencies form (AJ-SCR) and used on the Payroll Run Process Control form (AE-SCR).*

Use of HEDs 998 and 999

As delivered, Payroll Administration uses HED 999 for Remaining Net Pay, pay remaining after all deductions and deposits are made into secondary accounts. However, using

Interactive Employee, you can designate either HED 999 or HED 998 for remaining net pay. When using HED 999 as a Reimbursement Account, no deductions are made from the HED nor does reimbursement pay roll up into net pay. Therefore, before implementing the payroll functionality of Interactive Employee, check to determine how HED 998 and 999 are used in your organization. If your organization has customized Payroll Administration to use HED 999 for reimbursements, you **must** use HED 998 for remaining net pay.

Note *If your organization has not customized /ST, you **must** use HED 999 as Remaining Net Pay.*

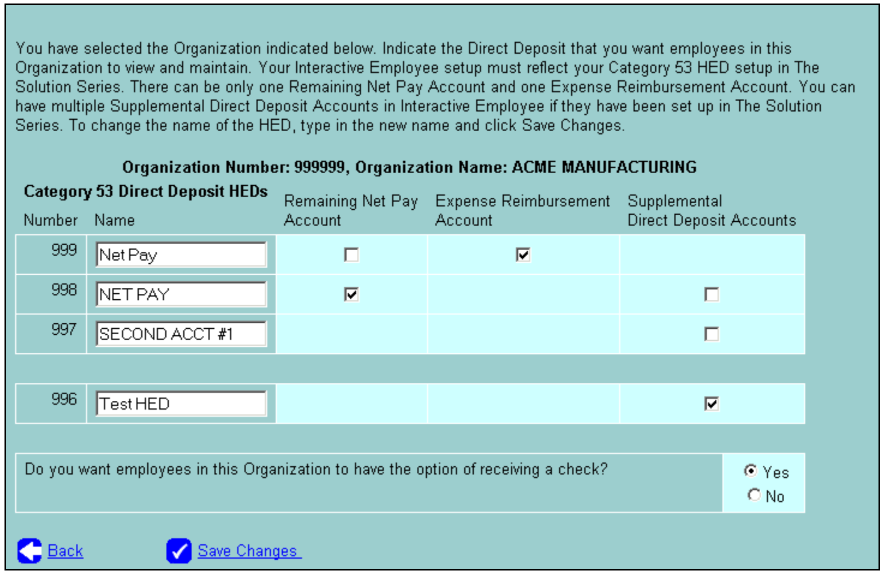
The table that follows illustrates the allowable HEDs for different account types.

	Primary Account used for Remaining Net Pay	**Expense Reimburse-ment Account**	**Secondary Accounts**
Allowable HEDs	999 or 998	999	998 if 999 is used as Primary Account and HEDs 501 to 997

A8-SCR and HED setup

Payroll Administration uses HEDs to describe the hours, earnings and deductions used to accumulate units or hours of work, calculate and make payments, and take deductions. HEDs are set up on the Company Earnings form (A8-SCR). For HEDs to be considered for direct deposit, they must first be set up as a category 53 HED (Direct depositable at the employee level) in Payroll Administration at the organization level. Once this is done, the HED can then be activated at the employee level and used as a direct deposit account.

If your company offers more than one direct deposit option, your organization must establish multiple direct deposit HEDs. For example, if employees are allowed to deposit pay into more than one account, an HED must be established for each. Your organization can set up as many HEDs as needed.


You have selected the Organization indicated below. Indicate the Direct Deposit that you want employees in this Organization to view and maintain. Your Interactive Employee setup must reflect your Category 53 HED setup in The Solution Series. There can be only one Remaining Net Pay Account and one Expense Reimbursement Account. You can have multiple Supplemental Direct Deposit Accounts in Interactive Employee if they have been set up in The Solution Series. To change the name of the HED, type in the new name and click Save Changes.
Organization Number: 999999, Organization Name: ACME MANUFACTURING
Category 53 Direct Deposit HEDs
Number
Name
Remaining Net Pay Account
Expense Reimbursement Account
Supplemental Direct Deposit Accounts
999
Net Pay
998
NET PAY
997
SECOND ACCT #1
996
Test HED
Do you want employees in this Organization to have the option of receiving a check?
Yes
No
Back
Save Changes

Interactive Manager and The Solution Series

The Interactive Manager functionality relies heavily on information set up in The Solution Series. The manager functions, Time Away and Staff Members information, require that you have The Solution Series Position Administration turned on. Use the System Options form (TG-SCR) to set Position Mgt to 'In Use'.

Setup for the Time Away Function must be done in The Solution Series Human Resources Administration. Staff Members functionality requries that payroll details for employees are setup in Solution Series Payroll Administration.

Setup in Position Administration

To use Interactive Manager you must have selected 'In use' from the drop down list in the Pos Adm field on the System Options form (TG-SCR). Interactive Manager uses information set up in Position Administration. To obtain the information used to route time away requests and to display the employee information for a manager's direct reports, Interactive Manager:

- Determines the manager's position using the Incumbency - Basic Details form (M40SCR).
- Determines the position subordinates of the manager's position by using the Position - Subordinates form (M35SCR)
- Determines the incumbents of the subordinate positions using the Position - Incumbents form (M21SCR)
- Determines the details for each incumbent using the Position - Basic Details form (M20SCR)
- Determines employee information using the Employee Information form (EF-SCR)

When an organization change occurs such as a manager's direct reports changing, you must access the Delete/Build TOP Cross-Reference Records form (ME5SCR) and check the Perform Rebuild field. This resets the cross reference records in FILE01 to correspond to the orgenization change.

Time Away Requests and Human Resources Administration

Interactive Manager allows employees in your organization to request time away from work by completing a Time Away Request online. To implement Time Away, your organization must have used Position Administration so that Interactive Manager knows the manager who should receive the time away request. The system forwards the request to the Inbox of the employee's manager and/or the HR department using information in the Time Away Workflow Routing Control Table (T93SCR). When the request has been approved or denied, the system updates the request and sends it back to the employee by placing it in the employee's Inbox. If the request was approved, the system updates the Absences form (93XSCR), which updates the balances on the Absence Entitlements form (93BSCR).

Note *If your HR department manually updates the Absences form (93XSCR) or the Authorized Time Off Hours Remaining form (93ASCR), the balances for the employee may not correspond to the requests the employee views online.*

The tables that follow show how the online Time Away feature in Interactive Manager interacts with The Solution Series Human Resources.

Time Away Routing Control

Your HR department sets up the routing for each time away request type on the Time Away Workflow Routing Control Table form (T93SCR).

Interactive Workforce Functionality	The Solution Series Functionality
The system routes request to Manager and/or HR department based on the routing for the request type.	Time Away Workflow Routing Control Table form (T93SCR)

Time Away Requests

Employees complete the time away request online, and the system routes the request to the appropriate manager and/or the HR department.

Interactive Workforce Functionality	The Solution Series Functionality
Employee Time Away Request	Time Away form (93HSCR). This form is populated by information entered on the web browser online and is not available to users of The Solution Series.
The system routes the request to the Manager and/or HR department	Routing is based on the setup on the Time Away Workflow Routing Control Table form (T93SCR).

Inbox

The time away requests from direct reports display in the manager's inbox and the manager approves or denies the request.

Interactive Workforce Functionality	The Solution Series Functionality
Manager inbox with pending time away requests	Inbox Control Records form (93NSCR) displays the pending time away requests for the manager. This form is used by the System Administrator when a manager is unexpectedly unavailable to approve a request.
When the manager and/or HR approves or denies the request, the system routes the request back to the originating employee's inbox.	Time Away form (93HSCR). This form is populated by information entered on the web browser online and is not available to users of The Solution Series.

Time Away Balances

When a manager approves a time away request, the system updates the time away balances for the employee.

Note: *You do not need Interactive Manager installed for employees to view their Time Away Balances.*

Interactive Workforce Functionality	The Solution Series Functionality
Time Away Request Records	Absences form (93XSCR) populated by Interactive manager when time away requests are approved.
Time Away Balances	Absences Entitlement form (93BSCR) shows the results of the calculation performed when approved time away requests are approved.
Update Time Away Balances for new entitlements	Time Away Boundary Control Table form (T93JCR). Interactive Manager updates employees available time away from work balances based on the time away requests approved and time away entitlements earned during the year. To determine new time away entitlements earned and apply them to the employee balances, Interactive Manager sets a Time Away Boundary to indicate to the system the start of the year for caclculating balances.

HR approval/denial of time away requests

If you configured an online time away request in Interactive Manager to be approved by the HR department, HR users access the HR-Approve/Deny Requests form (93MSCR) to approve or deny the request.

Note *Only pending time away requests with an HR routing display on the HR-Approve/Deny Requests form (93MSCR).*

To respond to a request, the HR representative selects a record, and clicks the Approve/Deny Request checkbox. The system then displays the Approve/Deny Employee Requests form (93RSCR), which contains the time-away request information. On this form the HR representative selects approve or deny from the drop down menu of options. If the HR department approves the request and the request does not need to be routed further, the system generates the appropriate absence records, updates the employee's time away balances, and routes the request back to the originating employee.

Note *If the HR department denies the request, the denied request returns to the employee's inbox without further routing even if further routing was setup.*

☞ *Refer to Using the Human Resource Management Solution documentation, Managing Employee Attendance for additional information and detailed instructions for using this functionality.*

System Administrator approval/denial of time away requests

If a manager is unexpectedly unavailable to respond to a pending time away request, your system administrator can access and act on any pending time away request in the system. Using the System Administrator - Approve/Deny Requests form (93WSCR) the administrator first selects manager or employee using the drop down list of options and then enters the organization (control 1-2) and employee number of the manager or employee. If the administrator selects manager, the system displays the Direct Report - Approve/Deny Requests form (93NSCR) from which the system administrator can select a pending request. The system then displays the Approve/Deny Employee Requests form (93RSCR) allowing the administrator to select an Action from the drop down list.

If the administrator selects Employee on the System Administrator - Approve/Deny Requests form (93WSCR), the system displays the Approve/Deny Employee Requests form (93RSCR) allowing the administrator to select Approve or Deny from the drop down list.

If the approved request is configured to be routed to HR after manager approval, the request is still pending subject to the response of the HR department representative.

☞ *Refer to Using the Human Resource Management Solution documentation, Managing Employee Attendance for additional information and detailed instructions for using this functionality.*

Staff Members information and Position Administration

The Staff Members function uses the structure in The Solution Series Position Administration to build pages with information combined from the Position Administration forms. To build the records you must use the Delete/Build TOP Cross-Reference Records form (ME5SCR). The Staff Members function shows only for a manager's direct reports. The table that follows shows how the Employees at a Glance feature in Interactive Workforce and The Solution Series interact.

Staff Members

Interactive Workforce Functionality	The Solution Series Functionality
List of Staff Members	ME1SCR*
Contact Information	ME4SCR*
Work Details	ME2SCR*
Personal Details	ME3SCR*

* The ME1SCR, ME2SCR, ME3SCR, and ME4SCR programs were developed specifically for Interactive Workforce and combine data from a number of forms in The Solution Series.

For Employees at a Glance to be fully functional, you must have completed information in The Solution Series forms that follow. The Delete/Build TOP Cross-Reference Records form (ME5SCR) builds records using information from the Position Administration listed forms.

- ME1SCR: **M20SCR, M21SCR, M36SCR, M40SCR**
- ME2SCR: **EF-SCR, 40-SCR, 49-SCR**
- ME3SCR: **EF-SCR, 02-SCR, 10-SCR**
- ME4SCR: **EM-SCR, 05CSCR, 03-SCR**

Interactive Benefits and The Solution Series

To use Interactive Benefits you must have set up information in The Solution Series Benefits Administration.

- For benefits enrollment, each welfare benefit plan offered by your organization must be a component of a flex master regardless of whether or not you award flex credits or dollars to your employees.
- Before an employee can use Interactive Benefits to enroll in benefits, you must enter in The Solution Series any data used in the calculation of their eligibility that the employee does not enter via Interactive Workforce. This includes salary details, pay HEDs, and date of birth.

If your organization requires other information based on your business processes, the information must exist in The Solution Series in order to be extracted and loaded into Interactive Workforce.

Using benefits flex masters

Flex Masters are established in Benefits Administration to collect all welfare benefit plans for an organization under one umbrella—the Flex Master. The flex master contains rules that govern the entire designated collection of plans. In addition, each component plan may have additional rules, such as more restrictive eligibility requirements.

To use Interactive Benefits for benefits enrollment, each welfare benefit plan offered by your organization must be a component of a flex master regardless of whether or not you award flex credits or dollars to your employees. The benefits information that displays for the employee in Interactive Benefits originates with the organization's flex master. If your organization does not use flexible benefits for welfare plans and so has not created a flex master, your benefits administrator must set up a flex master and add the appropriate welfare benefits plans as components of the flex master in The Solution Series Benefits Administration.

A flex master can apply to one or several organizations (control 1-2s). You determine within the Benefits Administration functionality of Interactive Benefits which organizations use which flex master. Employees can then enroll in benefits online using Interactive Benefits.

Following is a general overview of the process for setting up a flex master:

- Set up all welfare benefit plans in Benefits Administration using the forms applicable to your organization and the plan.
- Set up a flex master using the Benefit Plan Rules form (TK-SCR). Create an ID for the flex master and be sure to choose Flex Benefits Master as the plan type. You must maintain this form annually for benefits enrollment.

Note *Be sure the Supplemental Pre-tax and Supplemental Post-tax fields have not been used for flex benefits HEDs in The Solution Series. These fields do not relate to flex benefits plans but rather are used for employee contributions to plans such as 401K plans.*

- Set up the Benefit Plan Eligibility Rules for the flex master (TL-SCR). These rules apply to all component plans but more eligibility restrictive rules can be added at the plan level.
- Set up the Option/Resulting Plan Status Rules form (TTOSCR) for the flex master to determine the appropriate benefit options.

Note *Your organization may automatically cover employees for a benefit such as life insurance. If so, and you do not want employees to have the option of declining the coverage, you must be sure you do not set up the Option/Resulting Plan Status Rules form (TTOSCR) in Interactive Benefits with a 'waived' option. The 'I decline to participate in a plan' option then will not appear to employees on the Step 1: Choose a Plan page for that plan.*

- Set up the Activity/Resulting Plan Status Rules (TTASCR) for the flex master. These rules govern how a separation activity, such as termination, affects an employee's plan participation.
- Set up a Flex Benefits Master Plan Rules form (TKFSCR). The entries on this form indicate whether or not the plan has associated flex credits, how deductions or unused credits should be displayed on an employee's pay, and when the flex credits should be calculated (before or during enrollment). You must maintain this form annually for benefits enrollment.

Note *Using Interactive Benefits employees can enroll in welfare benefit plans; however, this release of Interactive Benefits does not include deferred plans. Employees cannot allocate excess credits to a deferred plan such as a 401(k) online. Therefore, be sure the fields in the Deferred Plan HEDs section of the Flex Benefits Master Plan Rules form (TKFSCR) are blank.*

- If the plan is a flexible benefits plan, set up the Benefit Plan Prototype Contribution HED form (TS-SCR) for the flex master. This form uses the results of the Flex Plan Credits Calculation to determine the change in the employee's pay based on deductions or unused credits.
- If the plan is a flexible benefits plan, set up the Flex Plan Credits Calculation (FCCSCR) for the flex master. This sets the rules your organization uses to determine an employee's flexible credits. You must maintain this form annually for benefits enrollment.
- Add appropriate plans as components of the flex master you created (TP-SCR). You must maintain this form annually for benefits enrollment.

Note *Interactive Benefits allows no more than 33 plans within a flex master although Benefits Administration allows you to exceed this number. If a flex master has more than 33 plans and you verify that organization and flex master, Interactive Workforce does not display an error message. However, when users of that organization enroll in benefits, they will receive a system error message and be unable to save their benefit enrollments.*

☞ *Refer to The Solution Series manual, Using Benefits Administration, for more information on setting up and using Flex Masters.*

Data for Interactive Benefits

To use Interactive Benefits information must be setup in The Solution Series Benefits Administration. The tables that follow show how Interactive Benefits and The Solution Series interact.

Benefits

Benefits Solutions components must be implemented.

Interactive Benefits Functionality	The Solution Series Functionality
Current benefit enrollments/Next year's benefit enrollments	AP-ESS* Covered Dependents by Plan form (59DSCR) Beneficiary/Plan Cross Reference form (59BSCR) Welfare Plan Enrollments/Changes form (55CSCR)
Beneficiaries/ Benefit Allocations	Beneficiary/Bond Owner Information form (58-SCR) Beneficiary/Plan Cross Reference form (59BSCR) AP-Interactive Workforce*
Flexible Spending Accounts	FSA Balance form (57-SCR)

Benefits Enrollment

Benefits Solutions components must be implemented.

Interactive Benefits Functionality	The Solution Series Functionality
Benefits Eligibility	AP-ESS* Employee Information form (EF-SCR) Salary Assignment/Changes form (40-SCR) Employee Status History form (09-SCR)
Enroll in Benefits	AP-ESS* Spouse/Dependent Information form (10-SCR) Beneficiary/Plan Cross Reference form (59BSCR) Beneficiary/Bond Owner Information form (58-SCR) Covered Dependents by Plan form (59DSCR)

* The AP-ESS program, developed specifically for Interactive Workforce*,* combines data from a number of forms in The Solution Series. These include TKFSCR, FFCSCR, TM-SCR, TL-SCR, TTOSCR, TTASCR. Online users cannot see the AP-ESS.

Setting Interactive Workforce sessions in The Solution Series

The Solution Series has a defined number of sessions (or connections) available, and each session is identified by a unique session number. Communication between Interactive Workforce and The Solution Series uses an application programming interface (API) that allows the two software applications to pass information to each other. The main connection between The Solution Series and Interactive Workforce pages is the STAPI, which receives employee requests from Interactive Workforce, processes those requests through The Solution Series and returns the response to the browser. Therefore, STAPI needs to use some of the sessions available in The Solution Series.

To accommodate this need, Cyborg developed a new form, the Session Number Split Point (SSCRTL) form, in The Solution Series. Using this form, the Interactive Workforce technical administrator enters a number that represents a split point in the sessions. The entered value breaks the total Solution Series sessions into two groups: the session numbers that are less than the split point are reserved for direct Solution Series use, and the session numbers that are greater than the split point are reserved for STAPI use.

PART 2

Part 2 - Interactive Workforce Administration

In This Section

CHAPTER 4

Overview of Interactive Workforce Administration

In This Chapter

Introduction

Most of the setup performed in The Solution Series is ‘reused’ by Interactive Workforce. However, because Interactive Workforce was designed so users can enter and maintain information and enroll in benefits online, there is additional administration necessary just for Interactive Workforce. Implementing and ongoing administrative tasks are carried out by:

- Initial Administrator
- Interactive Workforce Administrator
- HR Administrator
- Payroll Administrator
- Benefits Administrator

Administrators set parameters for the system based on the organization’s specific needs. For example, the benefits administrator uses the benefits functionality to enter the window of time during which open enrollment takes place at your organization. Interactive Workforce then displays the information needed for employee benefits enrollment during that time period.

Only administrative users of Interactive Workforce—those given an administrator role—can access administrative functions.

Administrator roles

Administrative functions within Interactive Workforce have been assigned to four functional administrative roles: the Interactive Workforce administrator, and an HR, payroll, and benefits administrator. In addition, during installation of Interactive Workforce, an initial administrator user ID and password are created. This user ID and password always provide access to all administrative roles. Even if the initial administrator assigns administrative roles to others, the initial administrator can log on with his or her administrative user ID and password and perform all administrative functions. The initial administrator is the only administrator who is not an employee user and whose account cannot be modified. Also, no roles or functions can be taken away from the initial administrator.

The chart that follows shows the roles, expected experience, and responsibilities for these functional areas during and following implementation and includes information on the initial administrator.

Administrative Role	Experience/Responsibilities
Initial Administrator	Always has authority to all administrative functions: Interactive Workforce, HR, benefits, and payroll. Must perform the following tasks during implementation so other users can access the application: ■ Set user account and password policies ■ Import option lists ■ Select resulting statuses and organizations for load
Interactive Workforce Administrator	Can assign administrative roles to other Interactive Workforce users. Understands how Interactive Workforce and The Solution Series interact. ■ Imports option lists ■ Determines extract and load strategy, selects employee statuses and organizations for system extract and load ■ Maintains users' account settings. ■ Sets up page availability. ■ Provides for maintenance of Interactive Workforce.

Administrative Role	Experience/Responsibilities
Payroll	■ Has an in-depth understanding of the payroll functionality in The Solution Series Payroll Administration. ■ Understands how Interactive Workforce interacts with payroll functionality. ■ During implementation, evaluates and documents the impact of Interactive Workforce on current payroll processes, reviews and redesigns payroll processes, and implements payroll functionality. ■ Coordinates Interactive Workforce and payroll administration functionality. ■ Sets up allowable direct deposit HEDs by organization. ■ Working with the Interactive Workforce administrator, determines which payroll functionality should be provided to employee users.
HR	■ Has an in-depth understanding of the HR functionality in Human Resources Administration. ■ Understands how Interactive Workforce interacts with HR Administration and, if you have Interactive Manager installed, understands how Position Administration interacts with Interactive Manager. ■ During implementation evaluates and documents impact of Interactive Workforce on current HR processes, reviews and redesigns HR processes, and implements HR functionality. ■ Coordinates Interactive Workforce and Human Resources Administration functionality. ■ Assigns dependent numbering conventions. ■ Working with the Interactive Workforce administrator, determines what HR functionality should be provided to users.

Administrative Role	Experience/Responsibilities
Benefits (if you have Interactive Benefits installed)	■ Has an in-depth understanding of the benefits functionality in Benefits Administration. ■ Understands how Interactive Benefits interacts with Benefits Administration. ■ During implementation: evaluates and documents the impact of Interactive Benefits on current benefits processes, reviews and redesigns benefit processes, and implements benefits functionality. ■ Coordinates Interactive Workforce and Benefits Administration functionality. ■ Manages benefit plan groups. ■ Manages benefit plan subgroups. ■ Maintains benefit plan display order. ■ Selects flex master plans. ■ Maintains flex master plan information. ■ Maintains benefit plan information. ■ Assigns beneficiary numbering conventions. ■ Working with the Interactive Workforce administrator, determines which benefits functionality should be provided to users.

The initial administrator, by system default, can always access all the administrator functions (HR, payroll, benefits, and Interactive Workforce administration). Consider the size of your organization and your business needs when determining whether the initial administrator should perform all administrative functions or whether other administrators with specific roles should be created.

Assigning administrative roles

If you choose to assign administrative functions to other employees, determine how many administrators you need and what functions they should perform. For example, your HR administrator could perform the tasks of both the HR and benefits administrator, and the initial administrator could perform the Interactive Workforce and payroll administrative functions. Or the initial administrator assigns the role of Interactive Workforce administrator and allows that administrator to create additional administrators, if any.

Note *The benefits administrator function exists only if you have Interactive Benefits installed.*

If you choose to assign administrative roles to others rather than having the initial administrator fill all the roles, the initial administrator must assign administrative roles to others as part of the implementation tasks.

We recommend that you identify specialists in an area for administrative roles.

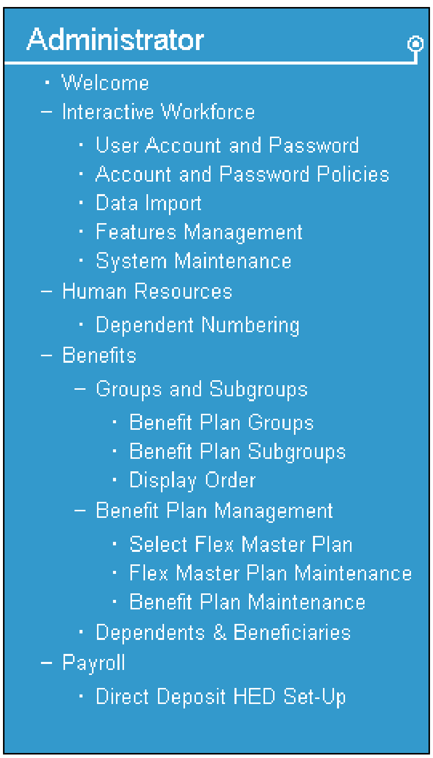
Cooperation among administrators

As you implement Interactive Workforce, you must consider some administrative functions. If you assign administrative roles to different individuals, the administrators must work together when performing their administrative tasks. For example, if you are using Interactive Benefits, when the administrator performing benefits administrative tasks is ready to perform setup in Interactive Benefits, he or she needs to coordinate this effort with the administrator performing the Interactive Workforce administrator tasks. They must develop a strategy that answers questions such as the following:

- Does the benefits administrator want to set up, in one step, all users who will have access to the application within the next year? If so, the Interactive Workforce administrator must set up the resulting statuses and organizations for the extract and load to include employee user IDs and passwords for all the users requested by the benefits administrator.
- How does the organization want to phase in Interactive Workforce? If your organization decides to phase in users in increments, the benefits administrator must be informed as more Control 1-2s are added to the extract and load so he or she can set up benefits information for these organizations.

Administrative functional areas

All the administration functionality is accessed from the Administrator section of the Navigator.



The following charts show the administrative functions available for each area and how each function is used.

Interactive Workforce Administrator

Function	Use
Change a User's Account Settings	Search for an employee's account details and change them, such as resetting a password to the initial one or resetting an account that has timed out. Assign administrator roles.
Account and Password Policies	Determine expiration times for passwords and unused accounts if defaults are not used.
Option List Import	Add option lists from The Solution Series to the Interactive Workforce database.
Resulting Statuses Selection	Determine by employee statuses which employees in The Solution Series will have access to Interactive Workforce.
Organization Selection	Determine which Organizations (Control 1-2s) will be loaded from The Solution Series for Interactive Workforce.
Features Management	Switch on and off Interactive Workforce pages and processes or give view-only access to pages.
System Maintenance	Take Interactive Workforce down for maintenance and bring it back up.

Human Resources Administrator

Function	Use
Dependent Numbering	Determine the numbering scheme for dependents. You can specify scheme by organization.

Payroll Administrator

Function	Use
Set up Direct Deposit	Determine, by organization, the HEDs to be used for net pay deposits, expense reimbursements and supplementary direct deposits.

Benefits Administrator

Function	Use
Manage Benefit Plan Groups	Maintain benefit plan groups to present information to users in a logical order and grouping.
Manage Benefit Plan Subgroups	Maintain benefit plan subgroups to present information to users in a logical order and grouping. This also insures users will enroll in plans appropriately (for example, choose one medical plan). Assign subgroups to groups for display purposes.
Display Order	Establish the order in which the groups and subgroups display to users.
Select Flex Master Plan	Select the flex master plan to be used for each organization for the current year and the next year.
Maintain Flex Master Plan Information	Establish enrollment periods and other information for each flex master.
Maintain Benefit Plan Information	Establish specific information for each benefit plan. Download new benefit plans from The Solution Series.
Dependent Coverage	Indicate which plan options allow coverage of dependents.
Beneficiary Numbering	Set up the numbering scheme to be used for beneficiaries

Implementation Tasks

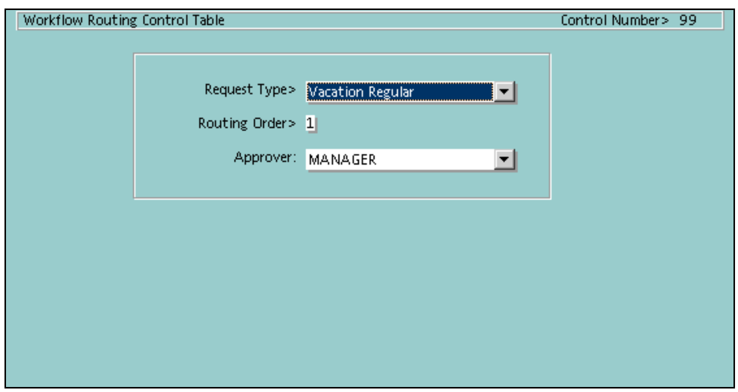
The following lists the sequence of events that must take place when implementing Interactive Workforce:

1. Initial Administrator logs on
2. Initial Administrator verifies the defaults or changes account and password policies.
3. Initial Administrator imports option lists
4. Initial Administrator selects the resulting statuses and organizations to configure the extract and load for loading users and organizations from The Solution Series to the Interactive Workforce database
5. Technical Administrator performs the extract and load
6. Initial Administrator verifies the extract and load by querying the Interactive Workforce database

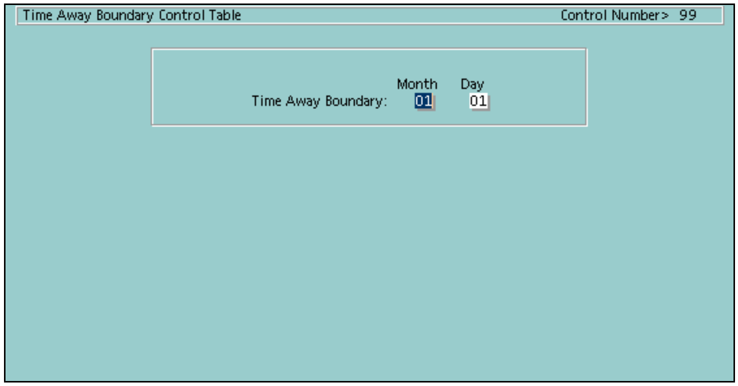
Most of these tasks will be performed not only during implementation but are also ongoing tasks for maintaining Interactive Workforce. After these tasks have been performed, the Initial Administrator can assign administrative roles to one or more users.

If you have Interactive Manager installed, the following additional tasks must be performed:

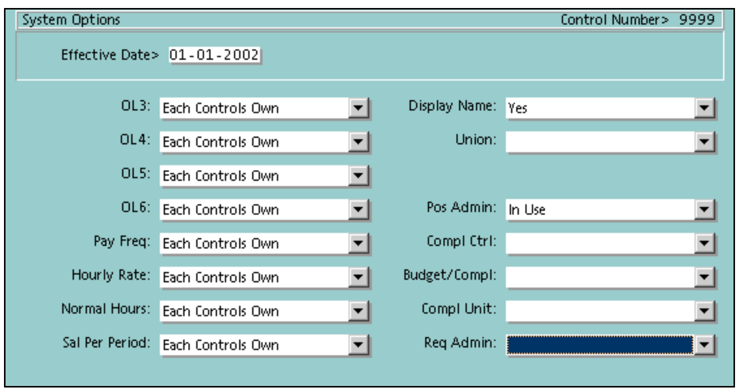
1. In Human Resources Administration set up the Time Away Workflow Routing Control Table (T93SCR) for each request type supported by your organization.



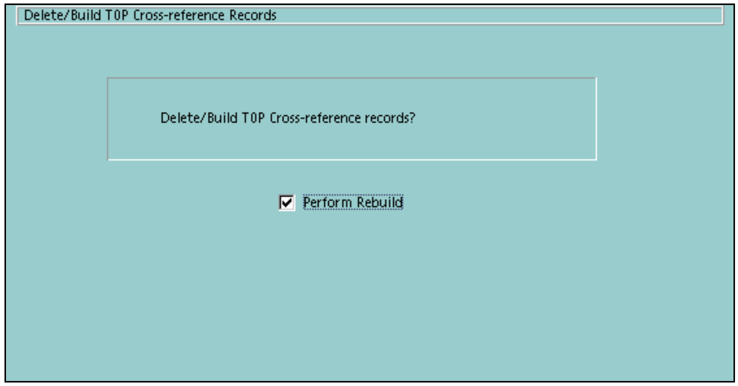
2. In Human Resources Administration set up the Time Away Boundary Control Table form (T93JCR) to include entitlements to time away balances



3. Be sure Position Administration is 'turned on' by setting the application to 'In Use' on the System Options form (TG-SCR)



4. In Position Administration build the organization records in FILE01 using the Delete/Build TOP Cross-Reference Records form (ME5SCR).



Security

Security is always a high priority when dealing with sensitive employee information. Each employee using Interactive Workforce is given an employee user ID and system generated password for their initial logon. The system asks them to create a new password when they log on for the first time. No one else has access to this password.

An administrator function gives the Interactive Workforce administrator capabilities to reset passwords, delete users, and set intervals for which passwords are valid and intervals before accounts expire if not used. You can customize the process for retrieving employee user IDs from The Solution Series and generating passwords to meet your requirements, as well as set the selection criteria to determine which employees can access the application. Users of Interactive Workforce who have administrative roles see only the functions for their role. The system verifies the User ID and checks to see if any administrator functions are assigned to the user. Using this process the system determines what each user sees on the Navigator. For manager functions the system checks forms in Position Administration.

Administrators do not have access to employee pages and cannot see employee information other than their own. To display the staff members function for managers, the system checks several forms in Position Administration.

Users of Interactive Workforce do not have access to The Solution Series unless they are given a user ID and password for the product. An employee's Interactive Workforce user ID and password will not give them access to The Solution Series.

See also

- ***Interactive Workforce and The Solution Series***
For information on the Position Administration requirements for Interactive Workforce

Access to data

Employees can access only the data you want them to see. A features management function enables you to switch pages on and off or make them 'view only'. An employee can access only his or her employee data via Interactive Workforce. Even Administrators can not access employee data via Interactive Workforce, and Managers can access specific information for only their team members.

Important: Employees must use the Log Off button to exit Interactive Workforce rather than just closing their browser. If they do not log off using the Log Off button, their session remains active until timed out, and another user may be able to access their records.

Audit records

Changes made by Interactive Workforce to information in The Solution Series appear on the IS/WASE audit report generated from The Solution Series. On this audit report the user making the changes is always Interactive Workforce and not the employee who made the change. The Interactive Workforce IS/WASX audit report was designed to provide an audit trail for Interactive Workforce. This report shows the change made in the system and prints the name of the employee who made the change. Your organization can use this report in a number of ways.

- If you are doing rollout/acceptance testing, check the audit report to see that changes made using Interactive Workforce are reflected in the FILE02.
- If your organization is using Interactive Benefits and an employee changes his or her address to another state or has a change in family status that allows him or her to update their benefit plan selections, your benefits administrator may need this information to change the employee's benefit plan.
- If an employee incorrectly entered his or her account number for the direct deposit of payroll checks, when the employee does not get their payment, your payroll department may want to check the audit report and show the employee the account number entered.

☞ *Refer to the eCyborg Interactive Workforce: Technical Implementation documentation for more information on the ISWASE report.*

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Create workflow routing for Vacation Regular

In Interactive Manager an employee's time away from work requests can be routed to the employee's manager and/or the HR department. This routing must be set up for each request type. In this task you set up the routing for the request type Vacation Regular so you can verify that the function works. A time away request for Vacation Regular will be routed to the employees' manager.

Note: *To limit the types of time-away requests an employee can make, edit the TA05, Request Type, option list to include only the request types available in your organization.*

1. **Access the Workflow Routing Control Table form (T93SCR)**

   On The Solution Series system, access the Workflow Routing Control Table form (T93SCR) by making the following selections:

   HR ► Employee Resourcing ► Manage Employee Attendance ► Time Away Workflow Setup

2. **Select a Request Type**

   Select Vacation Regular from the drop down menu for Request Type.

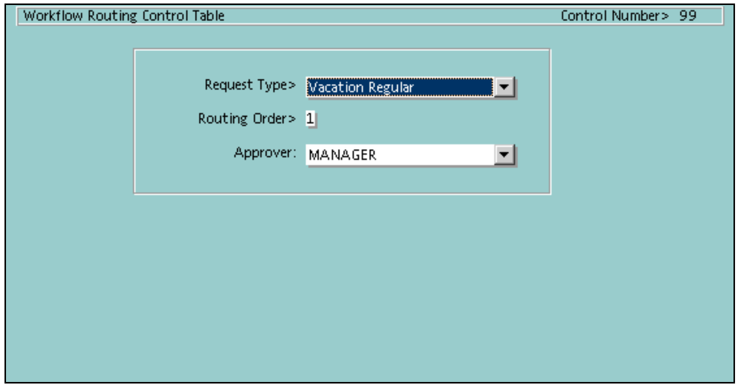
3. **Enter a Routing Order**

   In the Routing Order text box, enter 1. This is the sequence for the routing of time away requests for Vacation Regular.

4. **Select an Approver**

   Select Manager from the drop down menu for Approver. When an employee requests time away for regular vacation, Interactive Manager routes the request to the employee's manager.

The form should look similar to the following:



5. **Press Enter or Click Save**

Set up boundaries for Time Away Balances

Interactive Manager updates employees available time away from work balances based on the time away requests approved and time away entitlements earned during the year. To determine new time away entitlements earned and apply them to the employee balances, Interactive Manager sets a Time Away Boundary to indicate to the system the start of the year for calculating balances. Follow these steps to set boundaries.

1. **Access the Time Away Boundary Control Table form (T93JCR)**

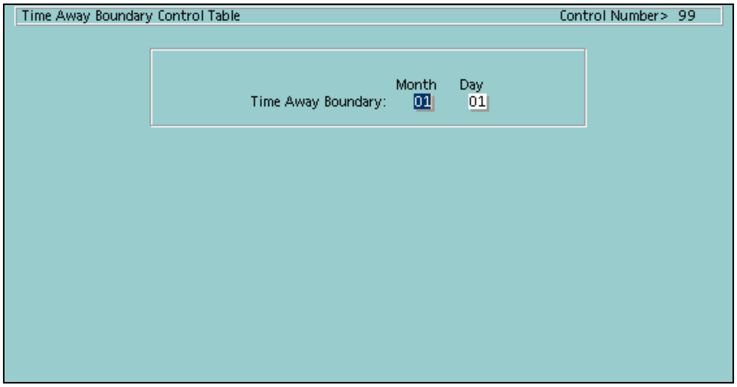
   On The Solution Series system, access the Time Away Boundary Control Table form (T93JCR).

   HR ► Employee Resourcing ► Manage Employee Attendance ► Time Away Boundary Control Table

2. **Enter the date from which to calculate time away balances**

   Enter the Month and Date when you want the system to start calculating balances. If your organization uses a calendar year for calculating time away from work, for example, vacation entitlement, enter 01 (January) for the month and 01 for the day. If your organization uses a fiscal year that differs from the calendar year to calculate time away entitlement, enter that month and day. To set up data to test Interactive Manager, use 01 for the month and 01 for the day.

Your completed form should look similar to the following:



3. **Press Enter or Click Save**

Set up Position Administration for Interactive Manager

To use Interactive Manager, users must use Position Administration. Follow the steps below to set up information for Interactive Manager.

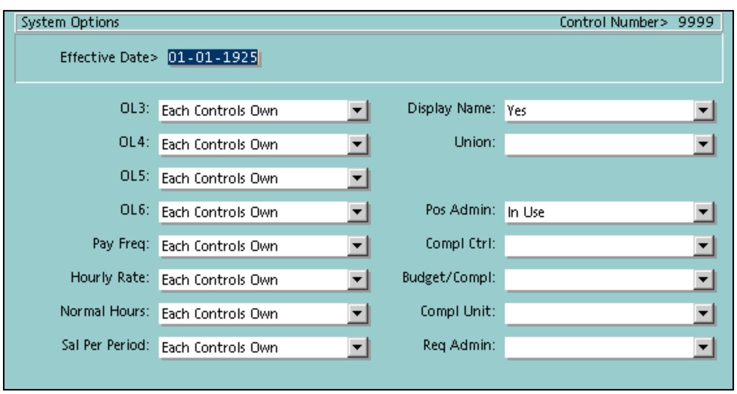
1. **Access the System Options form (TG-SCR)**

On The Solution Series system, access theSystem Options form (TG-SCR) by making the following selections:

HR ▶ HR Setup ▶ Setup HR Rules ▶ System Options

2. **Turn Position Administration on**

To use Interactive Manager, users must be using Position Administration. In the Position Admin drop down menu select In Use.



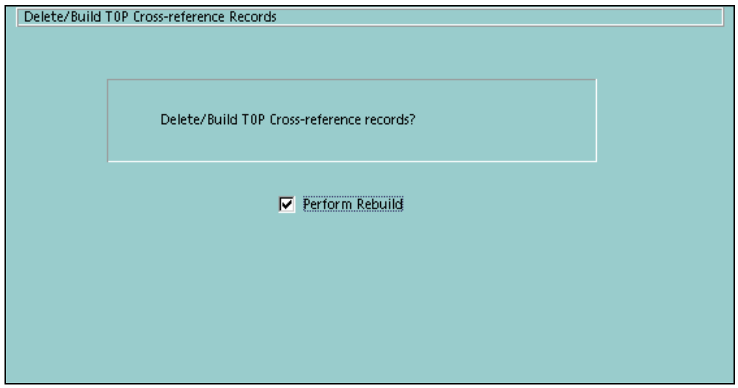
3. **Press Enter or Click Save**

4. Access the Delete/Build T0P Cross-Reference Records form (ME5SCR)

Interactive Manager uses organization information in Position Administration to build records that relate managers to their staff members (direct reports). You must build these records any time an organization change is made that affects employees.

5. Select Perform Rebuild

Click the Perform Rebuild checkbox. When you save the information, the system rebuilds the records used by Interactive Manager.



6. Press Enter or Click Save

CHAPTER 5

Initial Implementation and Ongoing Administration

In This Chapter

Introduction

Interactive Workforce is a web-based application that gives employees real-time access to view, add, and update their personal information held within The Solution Series, via a user-friendly, web-based interface. Managers using Interactive Workforce can view personal information for their team members as well as view and respond to their requests for time away. Interactive Workforce communicates with The Solution Series using an application programming interface (API) that allows the two software applications to pass information to each other.

The concepts at the beginning of this section explain the functions of the Initial and Interactive Workforce administrator roles and contain examples of when you might use the function. The Detailed Directions section gives you step-by-step instructions for performing the administrator tasks.

The Administrator section of the Navigator lists the tasks assigned to the Interactive Workforce administrator role. To clarify the purpose of the tasks, the concepts in this section cover several different categories of information. These categories are:

- Understanding the relationship between Interactive Workforce and The Solution Series
- Implementation considerations
- Ongoing administrative tasks

If you are implementing Interactive Workforce, we recommend you read all the concepts in this section.

Tasks

This section explains the following:

- Verifying or setting up account and password policies
- Importing option lists
- Selecting resulting statuses for Interactive Workforce extract and load
- Selecting organizations for Interactive Workforce extract and load
- Assigning administrator roles
- Managing features
- System maintenance
- Changing a user's account settings

Prerequisites

Before you can access the Interactive Workforce Administrator functions you must have a user ID with the role of Interactive Workforce administrator.

Questions answered

The following questions are answered in this section:

1. What is the function of the Interactive Workforce administrator during implementation?
2. Why must the extract and load be run to give newly hired employees access to Interactive Workforce?

3. How often must you load option lists?
4. What is the purpose of the extract and load process?
5. Why must administrators work together to set some application parameters?
6. Why is it important to set your timeout strategy before performing the extract and load?
7. How are administrators roles assigned in Interactive Workforce?
8. What user account functions does the Interactive Workforce administrator control?
9. What three options does the Interactive Workforce administrator control for the presentation of pages to users?
10. Why might you bring the application down?
11. What report contains Interactive Workforce audit trail information?
12. What is the purpose of the Session Number Split Point (SSCTRL) form in The Solution Series?

The initial administrator

The installation process for Interactive Workforce creates an initial administrator user ID and password. Only the initial administrator can log on to Interactive Workforce until he or she performs tasks to implement the system. The initial administrator’s user ID and password can never be deleted from the system nor can any of his or her roles be taken away. The initial administrator’s user ID gives him or her access to all administrative roles and their functions within Interactive Workforce. The initial administrator can then assign administrator roles to existing users. Even after assigning administrative functions to others, the initial administrator continues to have access to all administrative functions.

Your organization may want to consider making your The Solution Series Security Officer the initial administrator, but this is not a prerequisite. Anyone can be designated as the initial administrator.

Interactive Workforce implementation

Interactive Workforce administration includes initial administrative tasks performed during implementation and ongoing administrative tasks performed regularly. The Initial Administrator performs the tasks required for implementation. After Interactive Workforce is up and running, the Interactive Workforce Administrator performs some of the same tasks for the ongoing maintenance of the application.

The following chart lists the implementation tasks in the order in which they must be performed and the administrator who performs the task. The Initial Administrator must perform all tasks until he or she assigns the role of Interactive Administrator and any other administrator roles to other users.

Task	**Administrator**
1. Log on	Initial Administrator
2. Verify/Change account/password policies	Initial Administrator
3. Import Option Lists	Initial Administrator
4. Select organizations and resulting statuses for the extract and load	Initial Administrator
5. Perform extract and load	Technical Administrator
6. Verify extract and load (check Interactive Workforce for user IDs)	Initial Administrator
7. Assign administrative roles (optional)	Initial Administrator
8. Verify/change access to features	Initial Administrator or Interactive Workforce Administrator
9. Review content of Information Pages and modify those that require modification	All administrators

Task	Administrator
10. Perform setup for benefits, HR and payroll	All administrators

☞ *Refer to the eCyborg Interactive Workforce: Technical Implementation documentation for information on personalizing the system for your organization.*

Administrative Tasks

Each of the tasks for implementation and ongoing maintenance is explained in the following concepts. If the task is part of the implementation of the system, the concept contains Implementation information and Ongoing maintenance information.

Timeout strategy for new user accounts

Users of Interactive Workforce can be either new users or existing users. A new user is a newly hired employee or an existing employee who either has never used Interactive Workforce or who has not completed the checklist of tasks for new users. You set the time out strategy for employee accounts, the window of time during which a new user must access Interactive Workforce and change their system generated password.

Implementation

The time out strategy for employee accounts affects implementing Interactive Workforce. The Initial Administrator must set the number of days that determines the window of time during which a new user must access the systeme and change their system generated password to a user-defined password. To encourage new users to complete their new user tasks, you may want to set this field to 30 days or less. If a new user fails to perform their initial logon within the number of days specified in the Unused Account Time Out function, he or she will not be able to access the system. In this case the user must contact the HR or other appropriate department so the Interactive Workforce administrator can reset the employee's account.

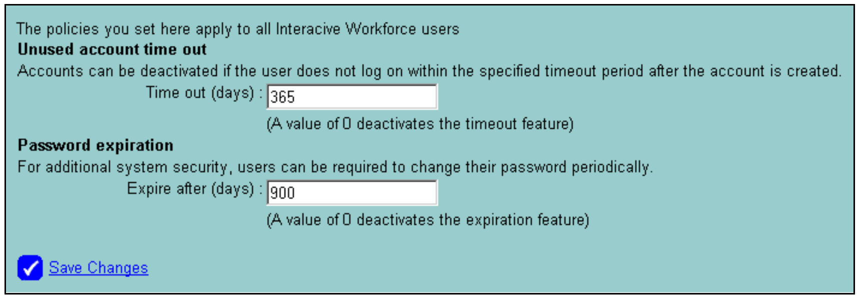
Consider the following when determining your timeout strategy:

- If you want to encourage new users to access the system and complete their new user tasks within a specified amount of time and then lock them out, set the days accordingly.
- If you are performing the extract and load process for all users, but rolling out the product to groups of users over a long period of time, set the Time out field to more than 90 days.

The default for this field is 30 days. Employees who have logged in and reset their password will not be affected because the system does not recalculate the days for existing users each time you reset the value in this field.

Ongoing maintenance

After setting the unused time out during implementation you may want to change this setting based on feedback from users or the number of new users you extract and load as you give access to Interactive Workforce to additional users. The account timeout for employee user IDs extracted during an extract and load process will be the number of days in this field when the extract and load process is performed.



See also:

- *S*etting up ***(see "Setting up account and password policies" on page 80)*** account and password policies ***(see "Setting up account and password policies" on page 80)***

For detailed directions on setting up user account and password policies for Interactive Workforce.

Password Expiration Policy

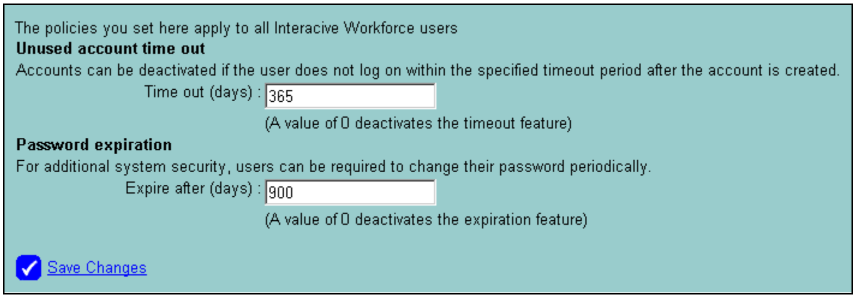
The Password Expiration function allows you to set the number of days that a user-defined password remains valid.

Implementation

To increase security on a system, you can require users to change their password periodically. If they fail to reset their password before the password expires, they can no longer access the application. The days the Initial Administrator sets for password expiration will affect emloyees whose information is extracted during the initial extract and load process.

Ongoing maintenance

Based on feedback from users and the way your employees use Interactive Workforce, you may want to change the number of days passwords are valid before you again perform the extract and load process to load information for new employees.



Use of option lists

The Solution Series contains a number of option lists used to complete information on various HR, benefits, and pay information forms both in the employee users and the administrative users functionality. These option lists populate the drop-down list boxes and other choices that appear in the product. For example, option list BA03 contains the benefit elections (individual, individual and spouse, and so forth) from which an employee can choose when enrolling in benefits. Option list HR04 contains the marital statuses employees can select when completing personal information. Option list PP02 contains the deduction categories for setting up payroll deductions and the description of the category. To implement the application, the Initial Administrator must load the option lists from The Solution Series to Interactive Workforce.

Pages in Interactive Workforce do not always use all options available in a list, and for some pages the options do not display but are needed to process the information on the page. We recommend that you review the option lists that are used by Interactive Workforce as part of the implementation process. If they contain options that you do not want employees to see, inactivate those lists in The Solution Series. Inactive options are not loaded into Interactive Workforce.

Following are the option lists that are used by Interactive Workforce.

- BA03 Options elected
- BA47 Contribution Resulting Frequency (not displayed in Interactive Workforce)
- BA64 Flex-action (not displayed in Interactive Workforce)
- BA70 TKF Deduction method (not displayed in Interactive Workforce)
- BA71 TKF Credit calculation rules (not displayed in Interactive Workforce)
- HR00 Yes-No (Used for Smoker ID)
- HR04 Marital Status Code
- HR05 Citizenship code
- HR10 EE status
- HR28 Relationship code
- HR29 Sex code
- HR30 Student status
- HR36 Name suffix code
- HR37 Name Prefix Code
- HR39 Native Language
- HR74 Contact type
- PM09 Location
- PP02 Deduction category
- PP08 Pay frequency code
- PP10 Deduction arrears code
- PP12 Deduction method code
- PP29 EE Pay Frequency
- PP40 Pay code description
- PR06 Bank account type
- PR07 Valid ACH Routing numbers
- PR08 Direct deposit edit
- TA01 Absence Type
- TA07 Time Away Request Status
- TA08 Time Away Action

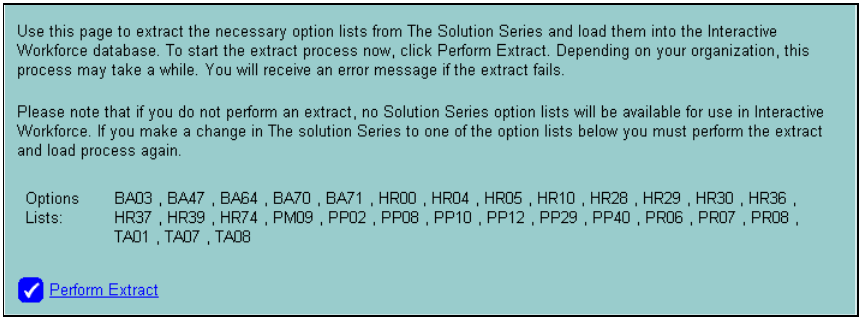
Implementation

To make these options available to users of Interactive Workforce, you must use the Option List Import function in the application. When you perform this function, the application makes a STAPI call to The Solution Series to get the needed option lists and put them into the Interactive Workforce database. You must perform this task after the system is installed and before you select any statuses or organizations used as selection parameters to load users. If you do not extract and load the option lists, no statuses will display when you try to set the statuses to extract employees.

Ongoing Maintenance

If your organization updates option lists in The Solution Series, then you must re-run the Load Option Lists function. Otherwise these changes will not appear in Interactive Workforce. To ensure that you always have the most current version of options, you plan to schedule this task on a repeating basis.

Note *You must rerun this process anytime an option list changes in The Solution Series.*



See also:

- Importing option lists ***(on page 81)***

For detailed directions on importing option lists from The Solution Series to Interactive Workforce.

The extract and load strategy

Before employees in your organization can use Interactive Workforce, their information must be extracted from The Solution Series and loaded into the Interactive Workforce database. A data extract and load process extracts employee user IDs from The Solution Series, generates passwords, and loads the information into the Interactive Workforce database. Most employee information remains in The Solution Series and is accessed by Interactive Workforce via STAPI. However, certain information such as the employee name, user ID, and password is stored on the Interactive Workforce database. The technical administrator then runs the extract and load process to generate user IDs and passwords for the employees who meet the criteria.

Implementation

The Initial Administrator must select statuses and organizations to extract employee information from The Solution Series. The implementation team can decide to extract all employee information in a single extract and load or perform the extract and load several times, each time adding statuses and/or organizations to extract additional employee information. The Initial Administrator (during implementation) or the Interactive Workforce Administrator (ongoing maintenance) sets the employee resulting statuses and the organizations they want loaded into the application's database using the following two administrator functions:

- Select Resulting Statuses
- Select Organizations

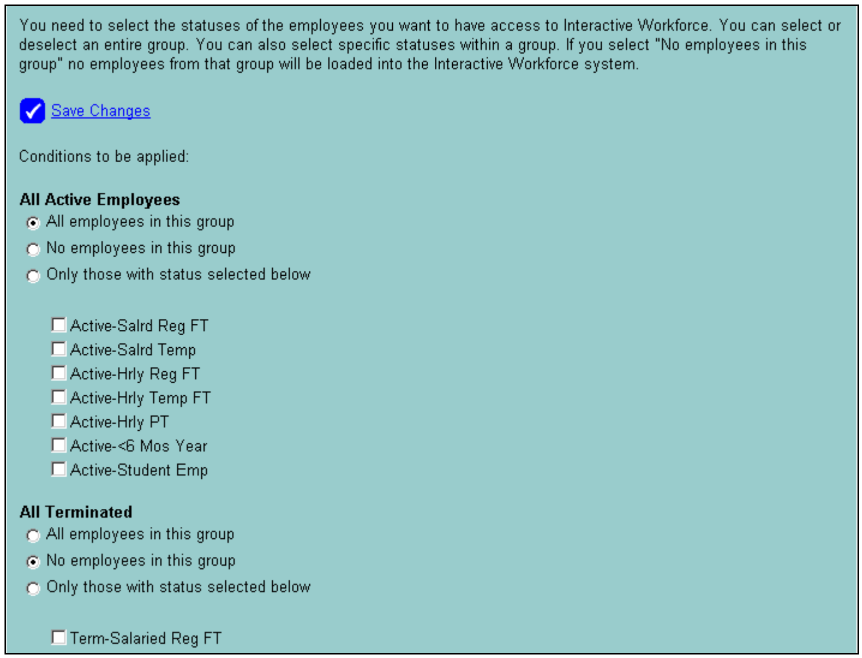
Ongoing Maintenance

While the extract and load process is performed during implementation, you must also perform this process regularly to allow access only to employees with the appropriate resulting statuses and in selected organizations. This process gives new employees access to Interactive Workforce and is the primary way to disallow access to terminated employees.

Each of these functions is explained in the following pages.

Select Resulting Statuses for Interactive Workforce

The Resulting Statuses Selection page displays all the statuses in the Solution Series option list HR10. The administrator must select at least one status or the extract and load will not create any employee users. A portion of the Resulting Statuses Selection page follows:



Select Organizations for Interactive Workforce load

The Organization Selection page displays a list of the valid Organizations (Control 1-2s) available in your implementation of The Solution Series. You must select at least one organization to be included in the load.

If you do not want to give all employees in an organization access to Interactive Workforce, you can restrict this in several ways. For example, you can filter out certain employees by not selecting their resulting status for load or by deleting specific user IDs using the Change a User's Account Settings function. Or, after extracting employee user IDs and generating passwords, you can simply not distribute this information to the employees whose access you want to restrict.

All Organizations (Control 1-2's) that are currently in The Solution Series are listed below. Place a check next to the Organization(s) you wish to extract from The Solution Series and load into the Interactive Workforce database.

Extract	Organization	Name
☐	10000	ACME MANUFACTURING
☐	20000	ACME MANUFACTURING
☐	30000	ACME MANUFACTURING
☐	40000	ACME MANUFACTURING
☑	991111	ACME CE/H ACCUMLATORS
☑	993333	ACME APPLICANTS
☑	995555	ACME RETIREES
☑	996666	ACME HOSPITALS
☑	997777	ACME MFTG CANADA
☑	999999	ACME MANUFACTURING

Extract employee user IDs and generate passwords

As delivered, the load process creates the employee user IDs and generates passwords for all employees included in the extract process. Unless customized, the employee user ID created is the EMPLOYEE-NUMBER field in The Solution Series. The password is automatically randomly generated. You or your technical administrator can run an SQL report to list the name, employee user ID, and password. You must decide how to distribute these to employees. A sample report follows.

Employee_Id	Initial_Password	Organization_Id	Employee_First_Name	Employee_Last_Name
1001	q8xrTtd	997777	JUNE	MEYER
1001	837yUW	999999	JUNE	MEYER
1001	83JW27	DD0001	JUNE	MEYER
1001	zHx25	DD0002	JUNE	MEYER
1001	3BgP7	DD0003	JUNE	MEYER
1002	37ytZx	997777	SAMUEL	MOORE
1002	5BXg8Q9m	999999	Samuel	Moore
1002	LATBm9	DD0001	SAMUEL	MOORE
1002	9UKL3Hf2	DD0002	SAMUEL	MOORE
1002	fb664	DD0003	SAMUEL	MOORE
1004	Whq6hy	997777	GORDAN	MORSE
1004	Eezf5Kf	999999	GORDAN	MORSE
1004	72aY4d9	DD0001	GORDAN	MORSE
1004	Rh6884	DD0002	GORDAN	MORSE
1004	vfMwK5t	DD0003	GORDAN	MORSE
1005	4geGwj	997777	ROBERT	MORRIS
1005	CDF23	999999	ROBERT	MORRIS
1005	s88gwz	DD0001	ROBERT	MORRIS
1005	JGd427U	DD0002	ROBERT	MORRIS
1005	dF7nMwb6	DD0003	ROBERT	MORRIS
1006	rq382s	997777	LYNNE	MERTZ
1006	uCVFp5vj	999999	LYNNE	MERTZ
1006	JVS9Fru5	DD0001	LYNNE	MERTZ
1006	Jm46q3z6	DD0002	LYNNE	MERTZ
1006	6D446P	DD0003	LYNNE	MERTZ
1007	YKzKZn3f	997777	KATHERINE	MORITZ
1007	g2M2R2q3	999999	KATHERINE	MORITZ
1007	45vB9b3	DD0001	KATHERINE	MORITZ
1007	95bR95d	DD0002	KATHERINE	MORITZ
1007	A8BpNc	DD0003	KATHERINE	MORITZ
1008	935C86Nt	997777	STACY	MAURICE
1008	hzHg82	999999	STACY	MAURICE
1008	Bu7nuy	DD0001	STACY	MAURICE
1008	9pzNY9Lu	DD0002	STACY	MAURICE
1008	UmA2H	DD0003	STACY	MAURICE
1009	6CxvTUW	997777	GARDNER	MOREAU
1009	4Rax4A	999999	GARDNER	MOREAU
1009	w9tgha9	DD0001	GARDNER	MOREAU
1009	2v45f	DD0002	GARDNER	MOREAU
1009	P4Py8LS7	DD0003	GARDNER	MOREAU
1010	j4QqU5y2	997777	MICHAEL	MOHR

Customize the extract and load process

Your technical administrator can customize the extract and load process to use different data as the selection criteria for the load. The Cyborg Scripting Language (CSL) report, Interactive Workforce Employee Extract (ESSXPT), that extracts data from The Solution Series for the employee load, extracts not only the employee name but additional information you can use to customize this function. The load users script can be modified to indicate the fields in The Solution Series to use for the initial password and login name (user ID). Therefore, if you do not want to use either the employee number as the employee user ID or the randomly generate passwords, you can customize this script.

☞ *Refer to the Data Load section in the Interactive Workforce: Technical Implementation documentation for the SQL query and additional information on how to customize either the selection criteria for creating users or the creation of the initial passwords or employee user IDs.*

See also:

- Selecting resulting statuses ***(on page 82)***
For detailed directions on selecting resulting statuses for the loading to Interactive Workforce.

- Selecting organizations ***(on page 84)***
For detailed directions on selecting organizations for loading to Interactive Workforce.

Maintain valid users

Using the Change a User's Account Settings feature in Interactive Workforce, the administrator maintains valid employee and administrator users for the system.

Employee users

Only employees who meet the selection criteria for the extract and load process are valid users with authorization to Interactive Workforce. Therefore, if you select only the status 'full time employee' as a criteria for extracting users, any employee who changes his or her status to part-time will no longer have a valid employee user ID and password after the extract and load is run. No changes made in The Solution Series take effect until you run the extract and load process. In the same way an employee whose status changes from part-time to full-time will not become a valid user until you rerun the extract and load process. Keeping the Interactive Workforce database current relies on running the extract and load process on a regular basis since this process updates the Interactive Workforce database.

Similarly, if employees leave your organization, they remain valid users of Interactive Workforce until they are identified in Human Resources Administrtion as having left and the extract and load process is run. As an alternative and an immediate way to remove a user, you can manually delete the user from the Interactive Workforce database. On the Step 3 of the Change a User's Account Settings process you can delete a user. This immediately bars the user from Interactive Workforce; however, the user's information remains in the Human Resources Administration. Remember that if the employee status is not changed to terminated in Human Resources Administration, the next time the extract and load is run, the employee will be reloaded as a valid user in Interactive Workforce.

See also

- Delete a user ***(on page 73)***

For additional information on deleting a user.

Administrative users

Ineractive Workforce allows you to assign administrative roles to a user. Each of the four administrator roles (Interactive Workforce, HR, payroll, and benefits) have different functions. During logon the system recognizes the administrative users and displays only the administrator functions for that administrative role.

Note *The initial administrator may use the account setting features to assign administrator roles, or he or she may perform all the administrative functions.*

Uses of the account setting features

Using the Change the user's account settings process, you can:

- Reset a user's current password back to the initial password.
- Reset an account that has timed out.
- Delete a user from the Interactive Workforce database. This does not delete the employee records from Human Resources Administration.
- Assign an administrator function to a user or delete a user's administrator role.

To perform any of these functions for Interactive Workforce involves a three step process. You make the actual change in Step 3. Below is a brief description of the steps.

Step 1: You search for the user whose account features you want to change by entering user information to locate the user's record.

Step 2: The system displays a list of user's names matching the information you entered for your query. In addition to the user's name, the system displays the organization, user ID, and, for administrators, the administrator role. You select the user whose account information you want to change.

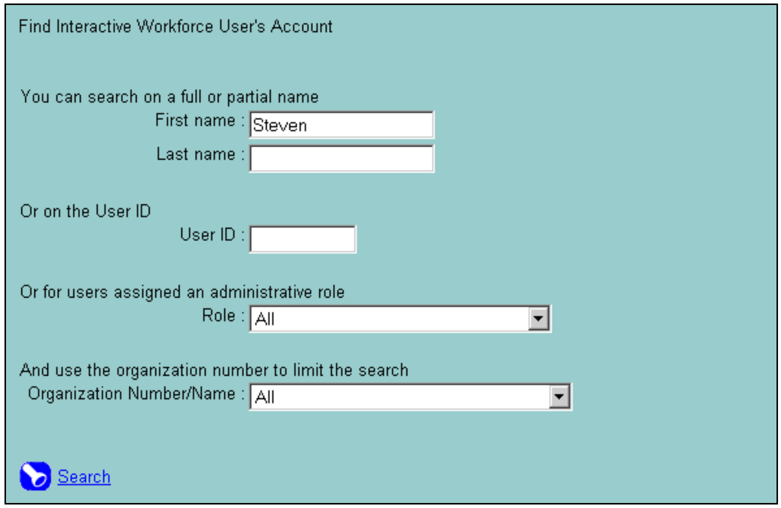
Step 3: The system displays the user information for the user you selected including the system-generated initial password for the user. From this page you change a user's account settings and assign administrator roles to users.

Following is an expanded explanation of the steps required to change account settings.

Step 1: Search for a user ID

Since you may or may not know all the information required to access a user's record, Step 1 in the process to change a user's account settings allows you to search for a user's record. You can enter any combination of the following:

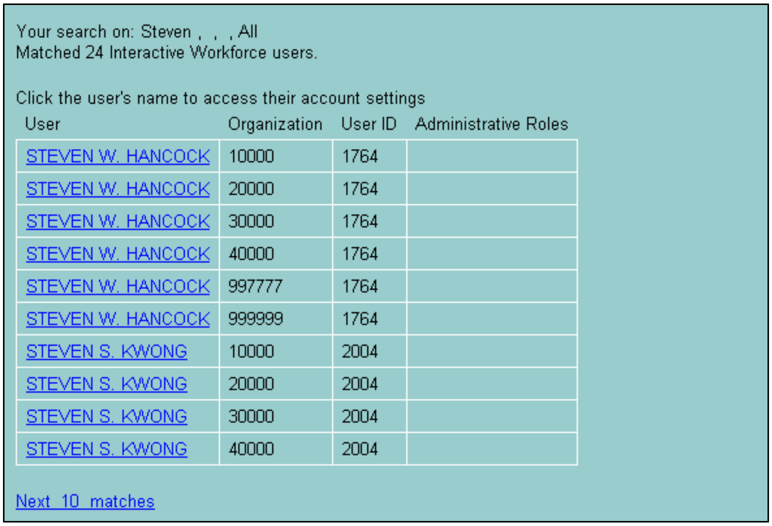
- One or more characters of the user's first and last name, and/or
- The user ID, and/or
- The user's administrator role, if any, and/or
- The organization in your company structure for which the user works



The system then searches for and displays all records that match the criteria you entered. The more precise your criteria, the more likely you are to find a specific user's record.

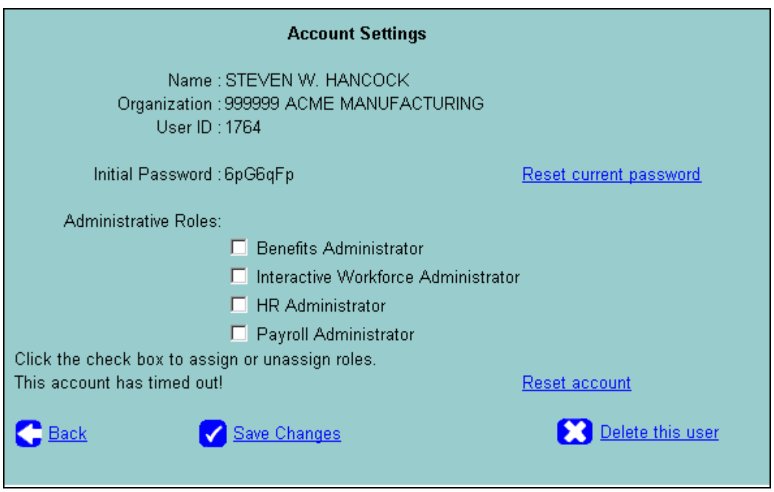
Step 2: Select the user whose account information you want to change

Interactive Workforce displays the user or a list of users who match the criteria you set for the search in Step 1.



Step 3: Change account settings

The Interactive Workforce administrator functions include a page that allows you to change many of the user's settings.



Reset a user's password

Users may forget their passwords, and you can reset them on the Change a user's account settings—Step 3 of 3 page. When you click the text 'Reset current password', the system resets the user's password to the initial password the system generated for the user in the extract and load process. This page of Interactive Workforce shows the system-generated password. After you reset the user's password, you must notify the user and give him or her the initial password again. Since the user changed this password immediately after logging on, he or she may not remember it.

Note *You cannot delete the system-generated password from the Interactive Workforce database nor can you ever view any user-created password. User-created passwords are encrypted in the database.*

Reset a user's current account

If a user fails to perform their initial logon within the number of days specified in the Unused account time out function, he or she will not be able to access the system. In this case the user must contact the HR or other appropriate department so the Interactive Workforce administrator can reset the employee's account.

Delete a user

When employees leave your organization or when the involuntary termination of an employee occurs, you must delete the employee from the Interactive Workforce database. You can do this by using the delete button or by running the extract and load process. Once the user has been terminated in The Solution Series and you perform the extract and load process, the user will no longer be in the Interactive Workforce database. Deleting a user ensures that employees who left the organization cannot change information in the system. You delete an employee from the database using the Change a User's Account Settings.

Note *If the user was deleted from The Solution Series and you are ready to run the extract and load process, you do not need to manually delete the user. If you delete a user from the Interactive Workforce database and the user is not deleted from The Solution Series, the user ID will be extracted and loaded into the Interactive Workforce database the next time you run the extract and load.*

When you delete an employee, the system deletes the employee user ID, password, and other related data from Interactive Workforce. If you delete a user in error, you must perform the extract and load process to again give the user access to the application. When reloaded, this user will be treated as a new user to the system with a new initial password that must be communicated to the user. In addition, the employee will be required to go through the new user process again. Take care when deleting users.

Assign or deactivate administrator functions

Your organization may decide to assign administrator roles to an employee or several employees. After accessing the account settings for a user, you can use checkboxes to assign an administrator role or roles to the user. You can assign more than one person to the same administrator role. In this way you ensure that a backup administrator exists. When the user with an administrative role logs on, the Navigator will contain the administrator functions for that role.

See also:

- Assigning or changing an administrator role ***(on page 86)***
For detailed instructions on assigning or changing an administrator's role

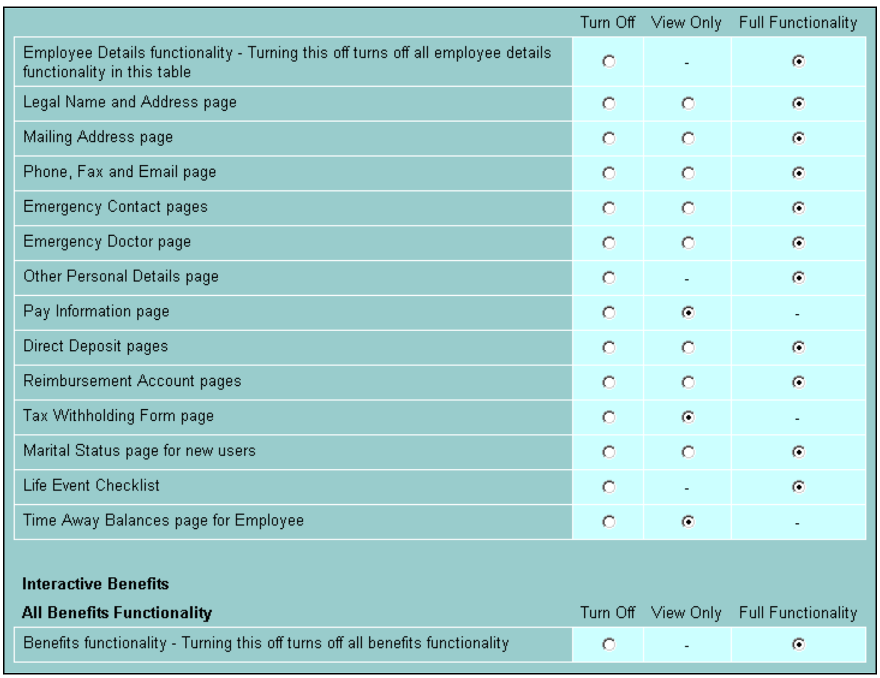
Considerations when setting access to features

Based on your organization's policies, you may want to limit users' access to certain features or give them view-only authority. Using radio buttons on the Features Management page, you can determine what functions users can access in Interactive

Workforce. Not all three options are available for every page. The chart that follows shows the button in the left column and, in the right column, the result for the user when you click the button.

Radio Button	Result
Full Functionality	Provides the user with all the functions for the feature. Links to the function appear as menu or navigation items. Users can enter information in all fields that accept data, and they can save their changes.
Turn Off	This page or process is not available to users. No links to the page display as menu or navigation items; therefore, the user cannot access the function.
View Only	Users can view the information on the page. However, they cannot enter information in the fields, and some buttons, such as the Save Changes and Delete buttons, do not display on the page.

Following is a portion of the Features Management page.



The consequence of turning off a page or process is that the user does not see any links to the page and so cannot start the process. This consequence is assumed for all pages that have the Turn Off radio button available. If you select View Only for the page, the user will be able to see the information; however, the Save Changes button and the Delete button, if the page has a delete button, do not display. When you make a change to the function of a page, users logged onto the system see the following dialog box when they request a page.

See Also

- Managing features ***(on page 88)***

For detailed step-by step instructions on managing the functionality of Interactive Workforce pages.

Information pages

To help users understand a process or provide them with company-specific information, we inserted links to an information page on a number of Interactive Workforce pages.

Typically, these pages display information specific to the process being followed on the page. Some information pages must be reviewed by the proper functional administrator so he or she can modify the text or create text specific to your organization's needs. When the review and update of the text on the information pages is complete, give the input to your technical administrator who will modify the file(s). Some information pages contain sample text for your review, while for others you must create entirely new files based on your organization's needs.

☞ *Refer to the Interactive Workforce: Technical Implementation documentation for more information on information pages and the setup and maintenance of these pages.*

Pages you must modify

The following chart shows pages you must modify based on your company's information. The chart shows the page name, the navigation to the page, and the purpose of the page. Use the Purpose of the Page column to determine what information your company would like to see displayed on this page. The page that displays when the user clicks the link text has the same name as the link text unless otherwise indicated. For pages that display only under certain conditions, this column also lists those conditions.

Page Name	**Navigation**	**Purpose of Page**
What's New This Year	Employee/Benefits Enrollment/ Important Information	Highlights changes to next year's welfare benefits
Additional Information about My Benefit Choices	Employee/Benefits Enrollment/ Benefits Eligibility/Show me additional information about my benefit choices	Left frame lists benefits plans available. Right frame contains a detailed description of each plan.

Page Name	Navigation	Purpose of Page
Employee News	Home/Employee News	This page defaults to the Employee Welcome page. You may add any information (company news, current events) that you want your users to view. You can add text or links to other websites. Remember to update this page frequently.
Handbook	Company/Handbook	You can insert one or more pages that contain the contents of your company handbook or a link to a site that contains the handbook.
Policies	Company/Policies	You can insert one or more pages that contain company policies or a link to a site that contains the policies.

Pages you may modify

The following chart shows pages you may modify based on your company's information. The chart shows the page name, the navigation to the page, and the purpose of the page. Use the Purpose of the Page column to determine what information your company would like to see displayed on this page. The page that displays when the user clicks the link text has the same name as the link text unless otherwise indicated. For pages that display only under certain conditions, this column also lists those conditions.

Page Name	Navigation	Purpose of Page
Show me how it works if I have more than one direct deposit	Employee/Pay Information/Direct Deposit	Explains the uses of multiple accounts for the direct deposit of pay. The link and page display only if your organization allows more than one direct deposit account.
About the Enrollment Process	Employee/Benefits Enrollment/ Important Information	Explains the Interactive Benefits enrollment process
Important Information about Benefits Enrollment	New User/Important Information about benefits enrollment	Explains the initial benefits enrollment process in Interactive Benefits
Welcome (Employee)	Employee/Welcome	Provides users with an overview of the functionality available in Interactive Employee
Welcome (Manager)	Manager/Welcome	Provides managers with an overview of the functionality available in Interactive Manager
Welcome (Administrator)	Administrator/Welcome	Provides administrators with an overview of the administrative functionality in Interactive Workforce

Pages you must create

The list shows pages you must create based on your company's information. The chart shows the page name, the navigation to the page, and the purpose of the page. Use the Purpose of the Page column to determine what information your company would like to see displayed on this page. The page that displays when the user clicks the link text has the same name as the link text unless otherwise indicated. For pages that display only under certain conditions, this column also lists those conditions.

<table>
<tr><th>Page Name</th><th>Navigation</th><th>Purpose of Page</th></tr>
<tr><td>Show me how flexible benefits credits are calculated and applied</td><td>This link appears on the following pages:
■ Benefits Eligibility
■ Benefits Enrollment Summary
■ Confirm Costs</td><td>Explains how benefits credits are determined and applied to the cost of elected benefits. You must create one of these pages for every Flex Master Plan you have set up in Benefits Solution that has Interactive Benefits users.</td></tr>
<tr><td colspan="3">For the system to display the correct Flex Master Plan information to the user, you must use the following naming convention: MstrFlxCrd<control number>_master id>_<master effective (yyyymmdd)>.html

Files must be located in the following directory: SelfService\Environment\inetpub\wwwroot\eCyborg\development\Info\Benefits

A sample template for these pages is provided with the file name of MstrFlxCrdSample.html.</td></tr>
<tr><td>Important instructions for this plan</td><td>This link appears on the Benefits Enrollment/Step 1 page</td><td>Explains the rules regarding the variable amounts for a particular benefits plan. You must create one of these pages for every benefit plan that has a variable amount.*</td></tr>
<tr><td colspan="3">For the system to display the correct information for specific variable amount plans to the user, you must use the following file naming convention: PlnVarAmt<control number>_<plan id>_<flex master effective (yyyymmdd)>.html

Files must be located in the following directory: SelfService\Environment\inetpub\wwwroot\eCyborg\development\Info\Benefits

A sample template for these pages will be provided with the file name of PlnVarAmtSample.html</td></tr>
</table>

To assist employees in determining what amount or number to enter on the 'Step 1: Choose a Plan' page for variable amount plans, the information page should contain at least the following information:

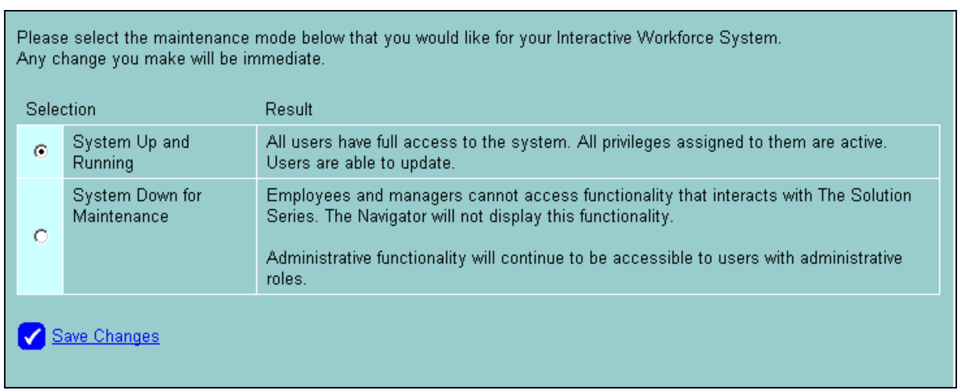
- Name of the plan.
- If the plan is a flexible spending account (FSA), explain what happens to excess money in the plan (money that was contributed but for which claims were not processed and approved).
- Whether to enter an amount or a multiplier for coverage or an amount or a percent for their contribution.
- Whether to enter an annual, per pay period, or monthly amount/number for the frequency of the contribution. This is based on the resulting frequency on the Benefit Plan Rules form (TM-SCR).

Note *The annual maximum variable amount is set on the Coverage and Contribution Factors form (TM-SCR) in Benefits Administration. If the amount you enter in Interactive Workforce allows users to enter an amount that exceeds the annual amount set on the Coverage and Contribution Factors form, Benefits Administration revises the contribution to equal the annual maximum allowed.*

- What is the maximum contribution allowed.
  For plans with a resulting frequency of annual, monthly, or weekly, include the maximum amount/number per year, month, or week.
  For plans that require the user to enter a per pay period amount, provide a table or worksheet so that the employee can calculate the maximum contribution he or she can enter based on his or her pay period.
- For plans where users enter a coverage amount rather than a contribution, explain how the cost of the plan will be calculated so they can determine the cost to them.
- Include any other parameters from the Benefit Plan Rules form (TM-SCR) for which the user needs to enter the correct amount/number, for example, 'You can enter coverage from 1 to 6 times your annual salary, in increments of .5, 1, 1.5, 2, 2.5 …'.
- Include any other information that would help users complete the Step 1: Choose a plan page.

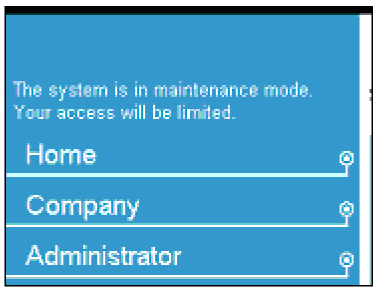
Considerations when bringing Interactive Workforce down for maintenance

Periodically, Interactive Workforce may be brought down while maintenance is being performed on The Solution Series. For example, you may need to update the option lists or benefits plans from The Solution Series. Using the System Maintenance page, you can select System Down for Maintenance. Select System Down about 30 minutes before maintenance begins. The time period should be at least 10 minutes beyond the browser time out period. This allows users time to finish any tasks they are performing.



Users logged onto the system when you change the status of the system to 'up' or 'down' see the following dialog informing them of a change.

If the system is 'down', the following message displays at the top of the Navigator telling users that their access is limited, and the Employee functions that require interaction with The Solution Series no longer display on the Navigator.



See also:

- Performing system maintenance ***(on page 93)***

For detailed directions on bringing Interactive Workforce up and down for system maintenance.

Detailed Directions

Note *You must have completed the Guided Practices in the prior sections to guarantee the successful completion of the Guided Practice that follows.*

Setting up account and password policies

Using the User Account and Password function, you determine:

- How many days user accounts in Interactive Workforce stay active if the password for the account is the initial password generated by the system.
- How many days user-created passwords are valid

Follow these steps to set up user account and password policies.

1. Access the account and password policies page

In the Administrator area of the Navigator, click Interactive Workforce then click Account and Password Policies.

Administration ▶ Interactive Workforce ▶ Account and Password Policies

For practice, access the Account and Password Policies page.

2. Enter the days the system-generated initial password is valid

In the Time out (days) field, enter the number of days, up to four numeric characters, the initial system-generated password remains valid. This field applies to:

- New accounts for which the user has not yet created a password
- Accounts for which an administrator reset the user's password back to the initial password, and the user has not yet created a password

To encourage users to use Interactive Workforce and new users to use and complete their new user tasks, we recommend you set this field to 30 or fewer days.

Note *If you enter 0 (zero) in this field, you deactivate the time out feature.*

Note *If you do not want to keep the default of 90 days for the number of days a user-defined password is valid, you should change the default in this field before beginning the tasks for the extract and load process. If you do not, the time out period for any users that log on and set their new passwords will be 90 days, the default, or the number of days you previously defined.*

For practice, enter 60.

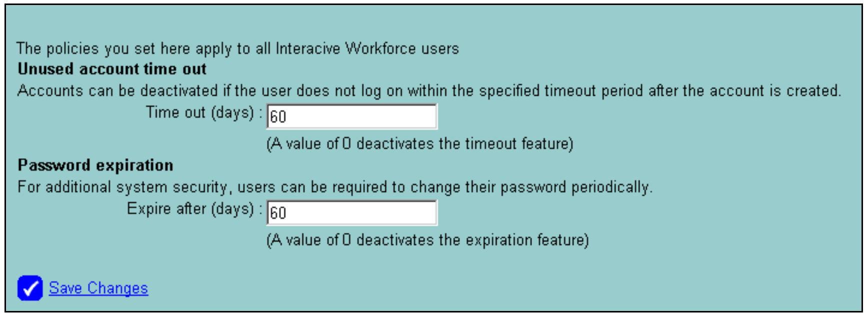
3. Enter the days a user password remains valid

In the Expire after (days) field, enter the number of days, up to four numeric characters, user-defined passwords remain valid. Interactive Workforce calculates the days before expiration of a password each time the user changes his or her password.

Note *If you enter 0 (zero) in this field, you deactivate the expiration feature.*

For practice, enter 60.

If you completed the Guided Practice, the resulting Interactive Workforce page should look similar to the following example.



4. Click Save Changes

The system saves your changes.

OR

Choose another function from the Navigator

If you made no changes or you do not want to save your changes, choose another function from the Navigator.

For practice, click Save Changes.

See also:

- Timeout strategy for new user accounts ***(on page 62)***

For information about Interactive Workforce account and password policies.

Importing option lists

To make option lists available to users of Interactive Workforce, use the Load Option Lists function. You must perform this task after the system is installed and before you select any statuses or organizations used as selection parameters to load users. If the option lists are not in the application database, no statuses will display when you try to set the statuses of employees to extract. You must rerun this process anytime an option list used by Interactive Workforce changes in The Solution Series.

This page displays the option lists available in The Solution Series. Follow these steps to extract the option lists from The Solution Series and load them into the Interactive Workforce database.

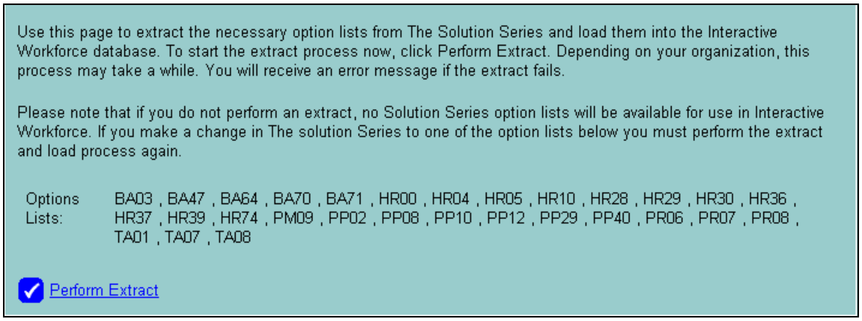
1. Access the Load Options Lists page

In the Administrator area of the Navigator, click Interactive Workforce then click Data Import. On the Data Import page select the Load Options Lists tab.

Administration ▶ Interactive Workforce ▶ Data Import ▶ Option List Import

For practice, access the Option List Import page.

If you completed the Guided Practice, the resulting Interactive Workforce page should look similar to the following example.



2. Click Perform Extract

The application extracts the option lists and loads the lists into the Interactive Workforce database.

OR

Choose another function from the Navigator

If you do not want to extract and load the option lists, choose another function from the Navigator.

For practice, click Perform Extract.

See also:

- Use of option lists ***(on page 64)***

For information on importing option lists to Interactive Workforce.

Selecting resulting statuses

Using the Select Resulting Statuses page, you determine the groups of employees who will have authority to use the online application. The employee statuses that display are those set up in your organization's Solution Series. Use this page to select employee statuses to include in the load.

Note *This page works in conjunction with the Select Organizations page to create the employee user IDs for Interactive Workforce.*

Follow these steps to select statuses for the Interactive Workforce database load.

Note *This page contains checkmarks only if the initial administrator selected at least one valid organization, one resulting status, and had users loaded into Interactive Workforce in the initial data load.*

1. Access the Resulting Statuses Selection page

In the Administrator area of the Navigator, click Interactive Workforce then click Data Import. On the Data Import page click the Resulting Statuses Selection tab.

Administration ▶ Interactive Workforce ▶ Data Import ▶ Resulting Statuses Selection

For practice, access the Resulting Statuses Selection page.

2. Select the appropriate radio button for each group status

This page displays employee statuses set up for your organization. You may have to scroll down the page to see all the available group status information. Three radio buttons appear for each group status.

- All employees in this status
- No employees in this status
- Only those with status selected below

Click one radio button for each group status.

Note *Use the scroll bar to view additional information on the Select Resulting Statuses for Interactive Workforce Load page.*

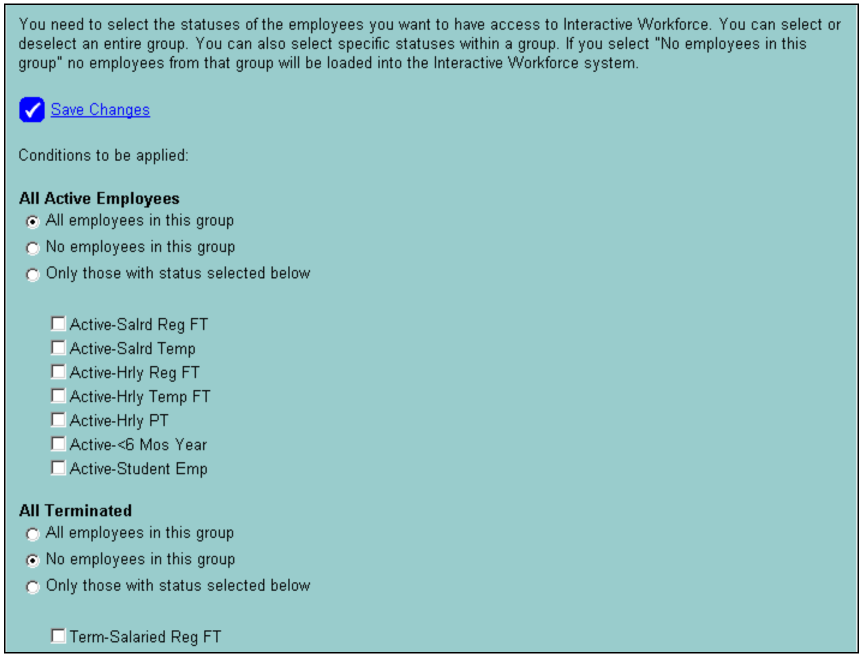
For practice, scroll down to view the groups and statuses selected as defaults.

3. Select the appropriate checkboxes in the group statuses

If you clicked 'Only those with status selected below', you must check at least one checkbox for that group status. Click all appropriate checkboxes.

For practice, accept the defaults.

If you completed the Guided Practice, the resulting page should look similar to the following example.



4. **Click Save Changes**

The system saves your changes.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, accept the defaults.

See also:

- The extract and load strategy ***(on page 66)***

For information on determining your extract and load strategy.

Selecting organizations

Using the Organizations Selection page, you determine the organizations to include when performing the extract and load process. This page displays the organizations set up in your company's *Solution Series* and works in conjunction with the Resulting Statuses Selection page to create the users IDs for Interactive Workforce.

Follow these steps to select organizations to include in the Interactive Workforce load.

1. Access the Organizations Selection page

In the Administrator area of the Navigator, click Interactive Workforce then click Data Import. On the Data Import page click the Organization Selection tab.

Administration ▶ Interactive Workforce ▶ Data Import ▶ Organizations Selection

For practice, access the Organizations Selection page.

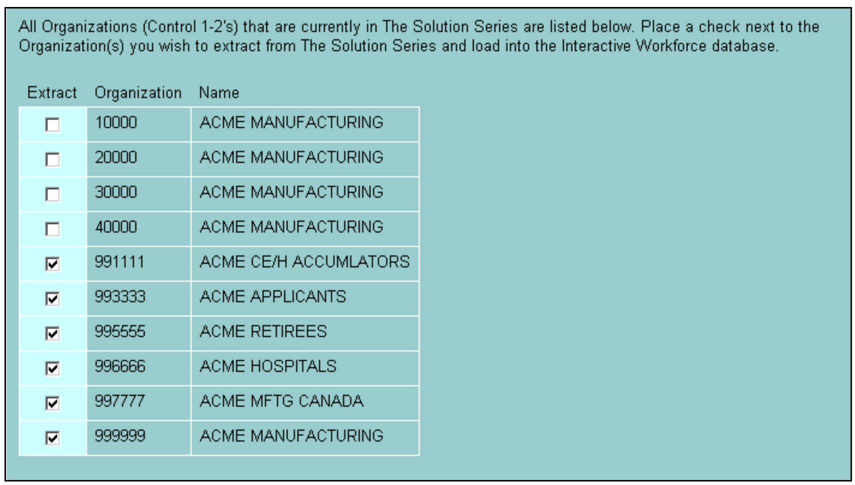
2. Select the appropriate check boxes in the extract column

Click the check boxes for all the organizations you want to include in the extract and load process.

For practice, select several organizations including the default organization 999999 for the extract and load process.

Note *If you make no selections on this page, no employee information will be extracted from The Solution Series to load into the Interactive Workforce database.*

If you completed the Guided Practice, the resulting page should look similar to the following example.



All Organizations (Control 1-2's) that are currently in The Solution Series are listed below. Place a check next to the Organization(s) you wish to extract from The Solution Series and load into the Interactive Workforce database.

Extract	Organization	Name
☐	10000	ACME MANUFACTURING
☐	20000	ACME MANUFACTURING
☐	30000	ACME MANUFACTURING
☐	40000	ACME MANUFACTURING
☑	991111	ACME CE/H ACCUMLATORS
☑	993333	ACME APPLICANTS
☑	995555	ACME RETIREES
☑	996666	ACME HOSPITALS
☑	997777	ACME MFTG CANADA
☑	999999	ACME MANUFACTURING

3. Click Save Changes

The system saves your changes.

OR

Choose another function from the Navigator

If you made no changes or you do not want to save your changes, choose another function from the Navigator.

For practice, retain the defaults.

See also:

- The extract and load strategy ***(on page 66)***
For information on determining your extract and load strategy.

Assigning or changing an administrator role

Assigning or changing an administrator role requires three steps. A separate page displays for each of these steps. On the first page, you search for the specific user to whom you want to assign or change an administrator role. The second page displays the user(s) who matches the criteria you set. You assign or change the administrator role on the third page.

Follow these steps to assign or change an administrator role.

1. Access the User Account and Password page

In the Administrator area of the Navigator, select Interactive Workforce, then click User Account and Password.

Administrator ► Interactive Workforce ► User Account and Password ► Change a User's Account Settings

For practice, access the Change a User's Account Settings page.

2. Enter the first name and last name of the user

Enter one or more characters of the user's first and last name. The more characters you enter, the fewer users the system will display as a result of your query. If you know the user's whole name, you do not need to enter the user's ID.

OR

Enter the user's ID

Enter the user's ID. You do not need to enter zeros preceding the ID. If you know the user's ID, you do not need to enter the user's first or last name.

OR

Enter the user's administrator role

If the user has an administrative function, use the drop-down list box to enter the user's administrator role. The system will display only users with the role you selected.

For practice, enter Steven as the first name and accept the defaults for the remaining boxes.

3. Enter the organization

Use the drop-down list box to select an organization. The system searches that organization's file for the user whose information you entered. If you do not select an organization, the system searches all organizations, which may lengthen the time required for the search.

The system displays the users who matched the criteria you set for the search. Use this page to select the user whose setting you want to change.

For practice, accept the default 'All'.

4. Click Search

Click Search to begin searching for the user. When the search is complete, the system displays all the users whose information matched the search criteria you entered on the previous page. The system displays, No Matches Found, if no users matched the search criteria.

For practice, click Search.

5. Select the user for the administrative role

Click the name of the user to whom you want assign an administrator role or whose administrative role you want to change.

The system displays the Account Settings for the user you selected. If all the names that match your criteria do not fit on the page, use the links, Next matches or Previous matches, to view additional names. These links appear only if the names that match your criteria do not fit on one page.

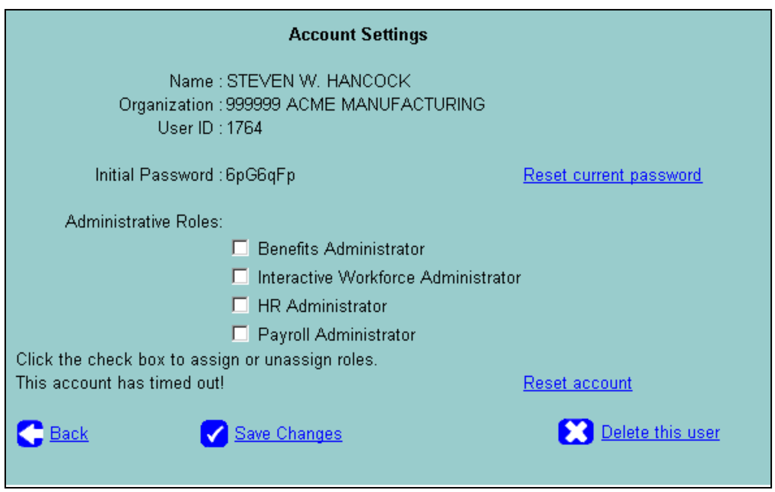
For practice, select Steven W. Hancock of Organization 999999.

6. Check the appropriate administrator role

To assign or change an administrator role or roles, check the boxes that apply and remove the checks from the boxes that do not apply. To remove all administrator roles from a user, click each checkmark to delete the checkmark.

For practice, do not check any boxes.

If you completed the Guided Practice, the resulting page should look similar to the following example.



3. Click Save Changes

The application saves your changes and returns you to the search criteria page.

OR

Back

If you do not want to save your changes or you want to select another user, click Back to return to the previous page.

For practice, click Back until you return to the Step 1 page.

See also

- Assign or deactivate administrator functions ***(on page 73)***

For information on administrators' roles

Managing features

Use the Manage Pages and Processes page to determine the pages and processes available to employee users by clicking one of the radio buttons for each page. On the chart that follows the left column shows the button and the right column shows the result for the user when you click the button in the right column.

Radio Button	Result
Full Functionality	Provides the user with all the functions for the page. Links to the function appear as menu or navigation items, users can enter information in all fields that accept data, and they can save their changes.
Turn Off	This page is not available to users. No links to the page display as menu or navigation items; therefore, the user cannot access the function.
View Only	Users can view the information on the page. However, they cannot enter information in the fields, and the Save Changes button does not display on the page.

Follow these steps to manage pages and processes for Interactive Workforce.

1. Access the Manage Features page

On the Administrator area of the Navigator, click Interactive Workforce and Features Management.

Administration ▶ Interactive Workforce ▶ Features Management

For practice, access the Features Management page.

2. Select a radio button for each of the features

Click the appropriate radio button for each of Interactive Workforce features.

For practice, select options for all features.

If you completed the Guided Practice, the resulting page should look similar to the following example.

	Turn Off	View Only	Full Functionality
Employee Details functionality - Turning this off turns off all employee details functionality in this table	○	-	◉
Legal Name and Address page	○	○	◉
Mailing Address page	○	○	◉
Phone, Fax and Email page	○	○	◉
Emergency Contact pages	○	○	◉
Emergency Doctor page	○	○	◉
Other Personal Details page	○	-	◉
Pay Information page	○	◉	-
Direct Deposit pages	○	○	◉
Reimbursement Account pages	○	○	◉
Tax Withholding Form page	○	◉	-
Marital Status page for new users	○	○	◉
Life Event Checklist	○	-	◉
Time Away Balances page for Employee	○	◉	-
Interactive Benefits			
All Benefits Functionality	Turn Off	View Only	Full Functionality
Benefits functionality - Turning this off turns off all benefits functionality	○	-	◉

3. Click Save Changes

The system saves your changes.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, to retain the current settings.

See also:

- Considerations when setting access to features ***(on page 73)***

For information on setting up Interactive Workforce page functionality.

Changing a user's account settings

Changing a user's account settings requires three steps. A separate page displays for each of these steps. On the first page, you search for the specific user whose settings you want to change. The second page displays the users who match the criteria you set. You change the user account settings on the third page. Following are the actions you can perform:

- Reset the user's current password back to the initial password generated during the load process.
- Reset an account that has timed out.
- Delete the user from the Interactive Wokrfrce database. This does not delete the employee's data from FILE02.
- Change the administrative role(s) assigned to this user.

The system uses the information you enter on this page to send a query to the Interactive Workforce database to find a specific user account. You can enter either the user's name, ID, or user role and the organization to which the user belongs. The more information you provide to the system for the query, the fewer number of users the system displays as a result of your query. In other words, the more information you provide, the greater the chance that you will find the searched for user on the first search.

Note *You must perform the extract and load for the appropriate resulting statuses and organizations to generate Interactive Workforce users. If you did not, this function will not display any users that match the search criteria you entered.*

1. Access the Change a User's Account Settings page

On the Administrator area of the Navigator, click Interactive Workforce and User Account and Password.

Administration ► Interactive Workforce ► User Account and Password ► Change a User's Account Settings

For practice, access the Change a user's account settings Step 1 of 3 page; use the 999999 test company.

2. Enter the first name and last name of the user

Enter one or more characters of the user's first and last name. The more characters you enter, the fewer users the system will display as a result of your query. If you know the user's whole name, you do not need to enter the user's ID.

OR

Enter the user's ID

Enter the user's ID. You do not need to enter zeros preceding the ID. If you know the user's ID, you do not need to enter the user's first or last name.

OR

Enter the user's administrator role

If the user has an administrative function, use the drop-down list box to enter the user's administrator role. The system will display only users with the role you selected.

For practice, enter Steven as the first name and accept the defaults for the remaining boxes.

3. Enter the organization

Use the drop-down list box to select an organization. The system searches that organization's file for the user whose information you entered. If you do not select an organization, the system searches all organizations, which may lengthen the time required for the search.

For practice, accept the default 'All'.

Interactive Workforce displays the users who matched the criteria you set for the search.

Use this page to select the user whose setting you want to change.

4. Click Search

Click Search to begin searching for the user. When the search is complete, the system displays all the users whose information matched the search criteria you entered on the previous page. The system displays, No Matches Found, if no users matched the search criteria.

For practice, click Search.

5. Select the user whose account settings you want to change

If all the names that match your criteria do not fit on the page, use the links, Next matches or Previous matches, to view additional names. These links appear only if the names that match your criteria do not fit on one page.

Click the name of the user whose account settings you want to view or change. The system displays the Account Settings for the user you selected.

For practice, select a user in the 999999 company.

6. Change the user's account settings

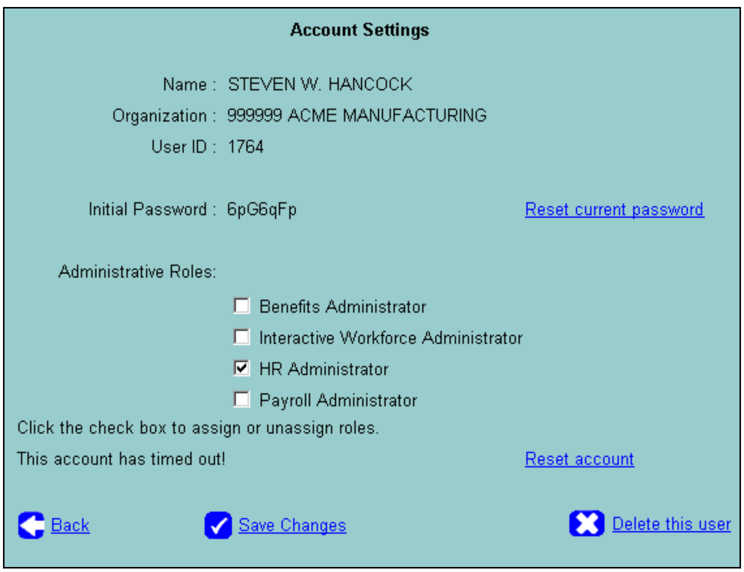
You can perform a number of functions from this page. The chart below shows you the name of the function and the result that occurs when you click the function.

Function	**Result**
Reset current password	The system resets the user's password back to the password generated during the load process. This password appears on the page. As the user may not remember his or her initial password, notify the user. The system returns you to the Interactive Workforce admin menu page.
Reset account	The system reactivates the user's account and returns you to the Interactive Workforce admin menu page. Use this function when an account timed out because of inactivity.
Delete this user	The system deletes the user from the Interactive Workforce database and returns you to Change user's account settings—Step 1 of 3 page. No warning message appears to confirm your delete. If you delete a user in error, you must run the load program to again give the user access to Interactive Workforce.

Function	Result
Roles checkboxes	The roles checkboxes display only if, on the Step 2 page, you selected an employee with an administrative user ID. Check or uncheck the checkboxes to change the administrative role(s) assigned to the user. When the user logs on with his or her administrator user ID after you save the changes on this page, the Interactive Workforce Admin page shows the links to administrative roles you assigned using the checkboxes.
Save Changes	This button displays only if, on the Step 2 page, you selected an employee with an administrative user ID. Click Save Changes to save the changes made to the roles checkboxes. All other functions on this page occur as you click the underlined text.

For practice, check HR Administrator.

If you completed the Guided Practice, the resulting page should look similar to the following example.



7. Click Save Changes

The system saves your changes.

OR

Choose another function from the Navigator

If you do not want to save your changes or search for another user, choose another function from the Navigator.

For practice, choose another function from the Navigator.

See also:

- Uses of the account setting features ***(on page 70)***

For an explanation of Interactive Workforce account setting features and their uses.

Performing system maintenance

Use the System Maintenance page to inactivate Interactive Workforce for employee users so that maintenance can be performed on either Interactive Workforce or The Solution Series. Select System Down about 30 minutes before maintenance begins. The time period should be at least 10 minutes beyond the browser time out period. This allows users time to finish any tasks they are performing. Administrators can continue to access administrator functions.

1. Access the System Maintenance page

On the Navigator click Interactive Workforce and select System Maintenance.

Administration ▶ Interactive Workforce ▶ System Maintenance

For practice, access the Interactive Workforce System Maintenance page.

2. Select System Up and Running

Click System Up and Running to give users access to all functions assigned to them in Interactive Workforce.

Note *When the system is down, administrators continue to have access to their administrator functions.*

OR

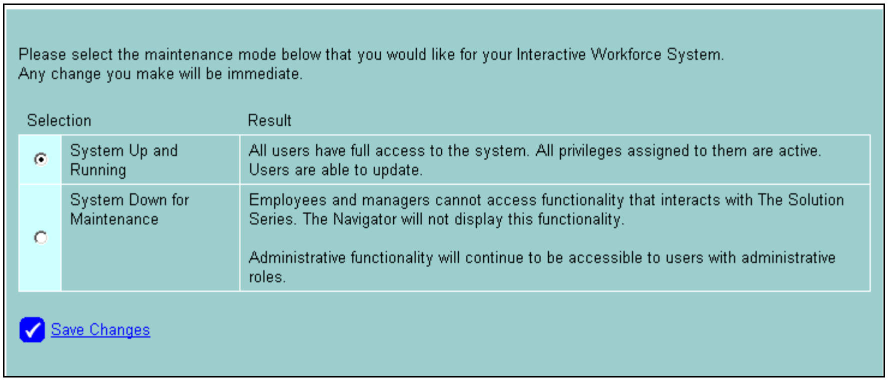
Select system Down for Maintenance

If you want to bring the system down for maintenance, click System Down for Maintenance. When you do this:

- The following message displays at the top of the Navigator: 'The system is in maintenance mode. Your access will be limited.'
- Links on the Navigator to Employee personal information and benefits enrollment functions no longer display
- Administrators can continue to access administrator functions

For practice, select System Up and Running.

If you completed the Guided Practice, the resulting page should look similar to the following example.



3. Click Save Changes

The system saves your changes.

OR

Choose another function from the Navigator

If you made no changes or you do not want to save your changes, choose another function from the Navigator.

See also:

- Considerations when bringing Interactive Workforce down for maintenance ***(on page 78)***

For information on bring Interactive Workforce down for maintenance.

Review of Questions Answered

1. What is the function of the Interactive Workforce administrator during implementation?

2. Why must the extract and load be run to give newly hired employees access to Interactive Workforce?

3. How often must you load option lists?

4. What is the purpose of the extract and load process?

5. Why must administrators work together to set some application parameters?

6. Why is it important to set your timeout strategy before performing the extract and load?

7. How are administrators roles assigned in Interactive Workforce?

8. What user account functions does the Interactive Workforce administrator control?

9. What three options does the Interactive Workforce administrator control for the presentation of pages to users?

10. Why might you bring the application down?

11. What report contains Interactive Workforce audit trail information?

12. What is the purpose of the Session Number Split Point (SSCTRL) form in The Solution Series?

CHAPTER 6

Interactive Workforce HR Administration

In This Chapter

Introduction

Interactive Workforce uses most of the setup already done in Human Resources Administration and so requires very little HR administration.

This section explains how to set up dependent numbering for Interactive Workforce. It also contains general information on the interaction between Interactive Workforce and Human Resources Administration.

As the HR Administrator you set up a dependent numbering system that works in conjunction with Human Resources Administration. To clarify the purpose of the HR task, the concepts in this section cover several different categories of information. These categories are:

- Understanding the relationship between Interactive Workforce and Human Resources Administration
- Implementation considerations
- Ongoing administrative tasks

For ongoing use we have categorized the concepts to help you quickly find the relevant information.

Concept	**Interactive Workforce & /ST**	**Implemen-tation**	**On-going**
Understanding dependent numbering (on page 99)		X	

Tasks

This section explains the following:

- Setting up dependent numbering

Prerequisites

Before you can access the HR Administration task, you must have the HR administrator role assigned to you.

Questions answered

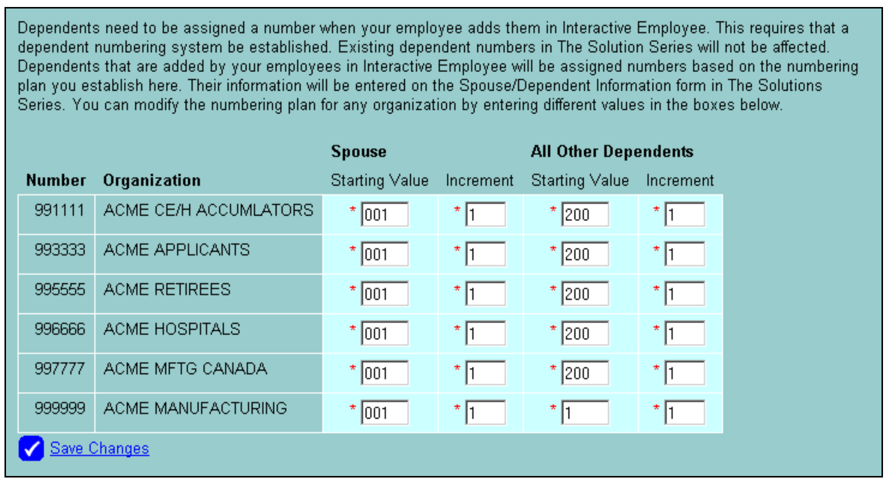
The following questions are answered in this section:

1. How is dependent numbering entered into Interactive Workforce?

Understanding dependent numbering

As part of the new user process, employees review the family members entered into Interactive Workforce on the Family Members page or add family members using the Family Members Details page. During Benefits enrollment or when an employee experiences a family status change such as marriage, divorce, legal separation, or a new child, he or she updates the family member information. This dependent data can be useful for verifying benefit coverage eligibility and coordinating benefit payments, as well as addressing invitations for a company event.

Human Resources Administration requires a unique number for each dependent but does not contain a numbering scheme for dependents. Instead, HR representatives manually enter a dependent ID on the Spouse/Dependent Information form (10-SCR). However, for employees using Interactive Workforce the Dependent ID number must be generated automatically. As employees enter new dependents, Interactive Workforce generates a unique three-position dependent ID, following the numbering scheme you set up.


Dependents need to be assigned a number when your employee adds them in Interactive Employee. This requires that a dependent numbering system be established. Existing dependent numbers in The Solution Series will not be affected. Dependents that are added by your employees in Interactive Employee will be assigned numbers based on the numbering plan you establish here. Their information will be entered on the Spouse/Dependent Information form in The Solutions Series. You can modify the numbering plan for any organization by entering different values in the boxes below.

		Spouse		All Other Dependents	
Number	Organization	Starting Value	Increment	Starting Value	Increment
991111	ACME CE/H ACCUMLATORS	* 001	* 1	* 200	* 1
993333	ACME APPLICANTS	* 001	* 1	* 200	* 1
995555	ACME RETIREES	* 001	* 1	* 200	* 1
996666	ACME HOSPITALS	* 001	* 1	* 200	* 1
997777	ACME MFTG CANADA	* 001	* 1	* 200	* 1
999999	ACME MANUFACTURING	* 001	* 1	* 1	* 1

Save Changes

HR representatives can continue to enter dependent ID numbers manually in Human Resources Administration because Interactive Workforce uses the dependent IDs on file when displaying and updating existing family members. When generating a new dependent ID, Interactive Workforce always checks to be sure the number has not already been used. The system will not duplicate dependent ID numbers regardless of where the number was created.

To establish a numbering scheme in Interactive Workforce, use the Dependent Numbering function. You can also accept the defaults. Interactive Workforce allows you to establish a numbering scheme so that you can easily identify whether the dependent ID refers to a spouse or another dependent. Because the HR department may have established a numbering scheme, check with your HR department to see if they have set rules for creating dependent IDs before defining a numbering scheme.

If you want to establish a numbering scheme, use this function during the implementation of Interactive Workforce. This numbering scheme should remain in effect unless HR changes the numbering requirements.

See also:

- Setting up dependent numbering ***(on page 101)***

For detailed directions on setting up dependent numbering.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Setting up dependent numbering

If you have been assigned the HR administrator role for Interactive Workforce, when you log on the Navigator displays an Administrator link. When you click this link, the administrator functional areas to which you have authority display.

To enter dependent numbering schemes, follow these steps.

1. Access the Dependent Numbering page

On the Administrator area of the Navigator, select Human Resources then Dependent Numbering.

Administrator ▶ Human Resources ▶ Dependent Numbering

For practice, log on using the Administrator password assigned to you and access the Dependent Numbering page.

2. Enter the numbering scheme for the spouse

Use the Starting Value and Increment fields in the Spouse column to establish a numbering scheme that allows you to easily identify the record of a spouse. The table that follows shows the field name in the left column and the action you take in the right column.

Field/Box	Action/Entry
Spouse Starting Value	Enter a number up to three-digits such as 001 to identify a spouse record. (Default: 100)
Spouse Increment	Enter a one- or two-digit number that the system will use to increment spouse records. (Default: 1)

For practice, enter 001 as the Starting Value and 1 as the Increment.

3. Enter the numbering scheme for dependents other than the spouse

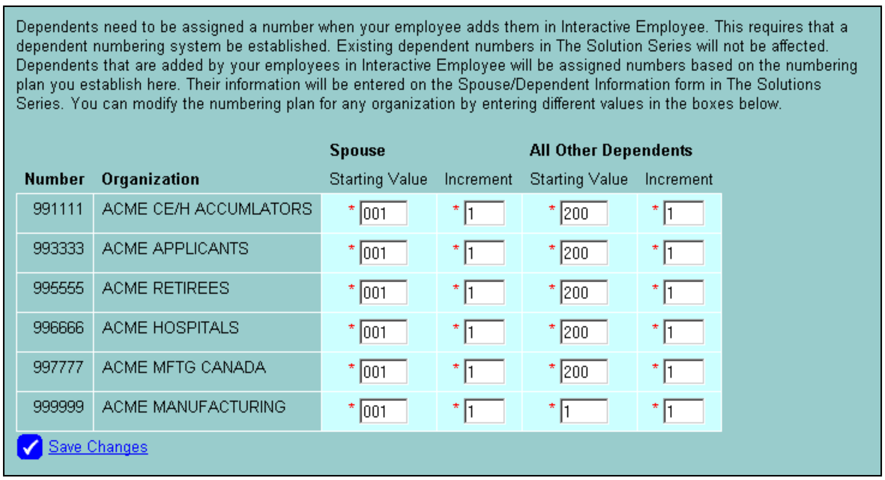
Use the Starting Value and Increment fields in the All Other Dependents column to establish a numbering scheme that allows you to easily identify the record of a dependent other than a spouse. The table that follows shows the field name in the left column and the action you take in the right column.

Field Name	Action to take
Dependent Starting Value	Enter a number up to three-digits such as 100 to identify a record for a dependent other than a spouse. (Default: 200)
Dependent Increment	Enter a one-or two-digit number by which the system will increment dependent records. (Default: 1)

Note *If you change the default values in the fields, you must enter a number. The system will not repopulate the fields with the default values.*

For practice, accept the defaults.

If you completed the Guided Practice, the resulting page should look similar to the following example.



Dependents need to be assigned a number when your employee adds them in Interactive Employee. This requires that a dependent numbering system be established. Existing dependent numbers in The Solution Series will not be affected. Dependents that are added by your employees in Interactive Employee will be assigned numbers based on the numbering plan you establish here. Their information will be entered on the Spouse/Dependent Information form in The Solutions Series. You can modify the numbering plan for any organization by entering different values in the boxes below.

		Spouse		All Other Dependents	
Number	Organization	Starting Value	Increment	Starting Value	Increment
991111	ACME CE/H ACCUMLATORS	* 001	* 1	* 200	* 1
993333	ACME APPLICANTS	* 001	* 1	* 200	* 1
995555	ACME RETIREES	* 001	* 1	* 200	* 1
996666	ACME HOSPITALS	* 001	* 1	* 200	* 1
997777	ACME MFTG CANADA	* 001	* 1	* 200	* 1
999999	ACME MANUFACTURING	* 001	* 1	* 1	* 1

Save Changes

4. Click Save Changes

Click Save Changes to save the parameters you set. Dependent records saved by Interactive Workforce will use these parameters to set identifying numbers for the records.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, click Save Changes.

See also:

- Understanding dependent numbering ***(on page 99)***

For an explanation of the dependent numbering process in /ST and Interactive Workforce.

Review of Questions Answered

1. How is dependent numbering entered into Interactive Workforce?

CHAPTER 7

Interactive Workforce Payroll Administration

In This Chapter

Introduction

This section contains general information on the interaction between Interactive Workforce and Payroll Administration during payroll runs and explains how to use the Payroll functions in Interactive Workforce to set up direct deposit information for employees using the online system.

As the Payroll Administrator, you set up direct deposit organizations and HEDs that work in conjunction with Payroll Administration. To clarify the purpose of your tasks, the concepts in this section cover several different categories of information. These categories are:

- Understanding the relationship between Interactive Workforce and Payroll Administration
- Implementation considerations
- Ongoing administrative tasks

If you are implementing Interactive Workforce, we recommend you read all the concepts in this section. However, for ongoing use we have categorized the concepts to help you quickly find the relevant information.

Concept	**Interactive Workforce & /ST**	**Implemen-tation**	**On-going**
Interactive Employee changes to Payroll Administration (on page 23)	X		
Overview of the Pay Information database (on page 112)		X	
Considerations when setting up direct deposit rules (on page 110)		X	X

Tasks

This section explains the following:

- Setting up direct deposit organizations
- Setting up direct deposit HEDs

Prerequisites

Before you can access the Payroll Administration task, you must have the payroll administrator role assigned to you.

Questions answered

The following questions are answered in this section:

1. What changes were made to payroll runs for Interactive Workforce and why?
2. How is the Pay Information database populated, and what is its purpose?

3. What payroll administration function must be set up to use the Direct Deposit and Reimbursement accounts in Interactive Workforce?

Overview of the direct deposit process

Interactive Employee offers a number of choices for direct deposit of regular or reimbursement payments. The direct deposit process depends on the rules defined for all organizations (Control 1-2s). The HEDs you choose for direct deposits affect all the organizations within your enterprise. Choices in the direct deposit process include the following.

- Employees can receive a paper paycheck or have their pay directly deposited into an account at a financial institution. If your enterprise supports direct deposit, employees can use Interactive Employee to maintain their primary account information online.
- Employees can divide their remaining net pay into more than one account. Your enterprise determines if, and how many, additional accounts are allowed. If additional accounts are supported, employees can use Interactive Employee to maintain their additional account information online. They can divide their remaining net pay, by amount or by percentage, for deposit into multiple accounts.
- Employees can direct that their reimbursement payments be deposited into one of their accounts. If your enterprise supports direct deposit of reimbursement payments, employees can use Interactive Employee to maintain direct deposit information for the deposit of their reimbursement payments.

Based on the choices your organization makes, you, as the Payroll Administrator, set up direct deposit options for employees using the Payroll functions of Interactive Workforce.

The primary account

Interactive employee payroll options default to the information set up on the employee's Payroll Administration record. Direct deposit information for a newly hired employee defaults to 'Payment by Check'. To change from the current direct deposit choice, employees use the Direct Deposit page to enter information for their account at their primary financial institution. The system uses this information to directly deposit the employee's check into the account set up as the primary account. For their account, employees provide the bank name and routing number, their account number, and the account type. Following is the Interactive Employee Direct Deposit Options - Primary Account Details page.

Additional accounts

If your enterprise allows employees to divide their pay among accounts, the Direct Deposit page contains both Primary and Additional account information. The detail account information includes the bank name, routing number, account number, and account type. The additional accounts also show the deposit amount (in dollars or as a percent of their remaining net pay) to deposit in each account.

Interactive Employee begins calculating deposit amounts with the last additional account and proceeds through to the first additional account. The primary account receives the money remaining after all deposits into additional accounts have been made. Users can click a link titled, 'Show me how it works if I have more than one direct deposit' to view an explanation of how they can divide net pay between multiple direct deposit accounts using amounts and/or percentages. This link accesses an information page that you can modify based on your organization's policies. Following is the Interactive Employee Direct Deposit—Additional Account Details page.

See also

- Information pages ***(on page 75)***

For information on the pages you must create and the pages you can/must modify.

Reimbursement accounts

If your organization customized Payroll Administration to use HED 999 as a reimbursement account, the employees within that organization will be able to choose whether to receive their reimbursement payments as a check or have them deposited directly into an account at a financial institution. With this setup, the payroll administrator uses HED 999 as a reimbursement account and HED 998 for Remaining Net Pay. Doing this allows employees to separate their reimbursement pay from their remaining net pay and deposit it into a separate account or the same account. Unlike Direct Deposit, there is only one reimbursement account allowed.

When the employee accesses the Reimbursement Account page in Interactive Employee, the page displays a list of the active account(s) the employee set up for direct deposit of their pay on the Direct Deposit page. If employees want their reimbursement payments deposited directly into one of the accounts used for direct deposit of their pay, they can click the radio button next to that account and then Save Changes. If the employee does not want to select one of the established accounts, they can set up a reimbursement account that is different from their other direct deposit account(s) by clicking 'Add a reimbursement account'.

Note *If the employee sets up a separate reimbursement account and then chooses to set up a different reimbursement account (different from their direct deposit choices), the second entry overrides the information for the first reimbursement account. Only the active accounts for either direct deposit OR reimbursement accounts display on the first reimbursement account page.*

Note: *Interactive Workforce does not send pre-notification to the receiving financial institution that Electronic Funds Transfer is about to begin.*

See also:

- Setting up direct deposit HEDs ***(on page 115)***

For detailed directions on setting up direct deposit accounts.

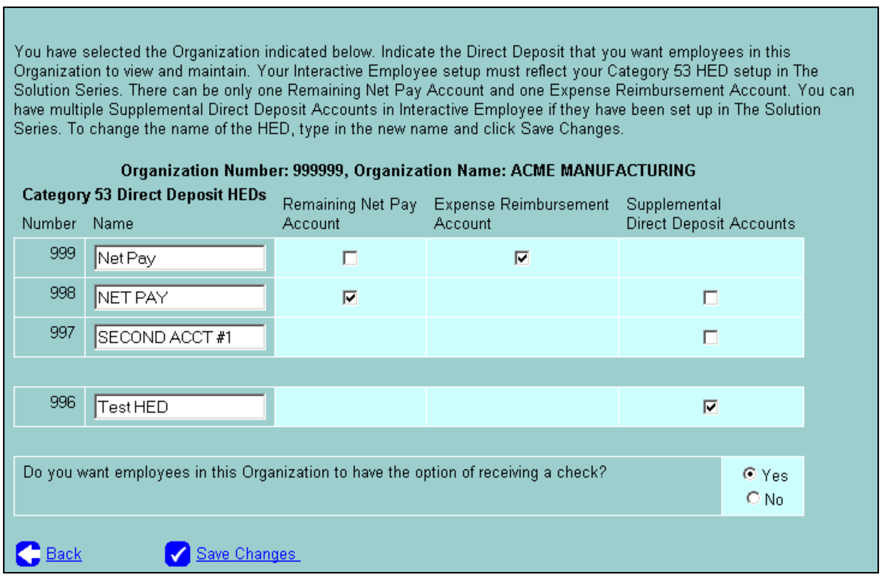
Considerations when setting up direct deposit rules

Interactive Workforce and the Payroll Administration share information; therefore, the following considerations relating to Payroll Administration affect your direct deposit rules.

A8-SCR and HED setup

Payroll Administration uses HEDs to describe the hours, earnings and deductions used to accumulate units or hours of work, calculate and make payments, and take deductions. HEDs are set up on the Company Earnings form (A8-SCR). For HEDs to be considered for direct deposit, they must first be set up as a category 53 HED (Direct depositable at the employee level) in Payroll Administration at the organization level. Once this is done, the HED can then be activated at the employee level and used as a direct deposit account.

If your company offers more than one direct deposit option, your organization must establish multiple direct deposit HEDs. For example, if employees are allowed to deposit pay into more than one account, an HED must be established for each. Your organization can set up as many HEDs as needed.


You have selected the Organization indicated below. Indicate the Direct Deposit that you want employees in this Organization to view and maintain. Your Interactive Employee setup must reflect your Category 53 HED setup in The Solution Series. There can be only one Remaining Net Pay Account and one Expense Reimbursement Account. You can have multiple Supplemental Direct Deposit Accounts in Interactive Employee if they have been set up in The Solution Series. To change the name of the HED, type in the new name and click Save Changes.

Organization Number: 999999, Organization Name: ACME MANUFACTURING

Category 53 Direct Deposit HEDs		Remaining Net Pay Account	Expense Reimbursement Account	Supplemental Direct Deposit Accounts
Number	Name			
999	Net Pay	☐	☑	
998	NET PAY	☑		☐
997	SECOND ACCT #1			☐
996	Test HED			☑

Do you want employees in this Organization to have the option of receiving a check? ◉ Yes ○ No

Back   Save Changes

Payment by check

Maybe your organization has decided it does not want to print paper checks but wants employees to use the direct deposit functionality of Payroll Administration and Interactive Employee. The Payroll Administrator function in Interactive Workforce allows you to designate, at the organization level, whether you want to print checks or not.

Renaming HEDs

The HED number and name for all category 53 HEDs is stored in Payroll Administration and populates the Set Up Direct Deposit HEDs page in Interactive Employee. If, as an administrator, you feel the HED description from Payroll Administration is too short or hard to understand, you can override the description by entering a new name. This new name for the HED displays only in Interactive Employee and does not affect the description in Payroll Administration.

Pre-noting for direct deposits

Interactive Employee does not send pre-notification to the receiving financial institution that Electronic Funds Transfer is about to begin. To do this, you must manually send a notification or customize the application.

Reimbursement accounts

If your organization has customized Payroll Administration to use HED 999 as a reimbursement account and HED 998 as Remaining Net Pay, you will be able to use the reimbursement account functionality in Interactive Employee. By setting up the Set Up Direct Deposit HEDs page you can set up a separate account just for reimbursement. This page can be turned on and off in Interactive Workforce Administration.

See also:

- Setting up direct deposit HEDs ***(on page 115)***
For detailed directions on setting up direct deposit HEDs.

Overview of the Pay Information database

Since Payroll Administration does not store pay information in a format that Interactive Employee can use, Interactive Employee has a Pay Information database to store pay information. New report generators 7L7L, Pay Run Extract, and 7M7M, Payslip Extract, gather this pay information in text files during the payrun process. The text files are then loaded into the appropriate Pay Information database tables. The information in these database tables populates the View Pay Information pages, allowing users to view their current pay information and their payments over past pay periods.

Employee Details

Mrs Catherine Louise Thompson-Whitefield

Employee Number:	4001
Social Security Number:	134-33-9001
Pay Period Salary/Rate:	$2,000.00

Check Details

Payment Date:	04-17-2002
Period Begin Date:	02-10-1992
Period End Date:	02-16-1992
Check Number:	00000006

Earnings	Current Hours	Current Amount	Year to Date Amounts
REGULAR PAY	88.00	2,000.00	4,000.00
	TOTAL PAY	$2,000.00	$4,000.00

Taxes	Current Amount	Year to Date Amounts
FICA-OASDI	124.00	248.00
FEDERAL W/H TAX (M-03)	375.16	375.16
FICA-HI	29.00	58.00
IL (M-03)	56.54	56.54

Deductions	Current Amount	Year to Date Amounts
Net Pay	1,415.30	3,262.30

Populating the Pay Information databases begins with the first payroll run after you install Interactive Employee. Therefore, the pay information pages contain no employee pay history for checks issued before you installed Interactive Employee.

Use of pay information

Using the Pay Advice Current and Pay Advice History pages, employees can view their pay information online. The Pay Advice Current page displays only information for the most recent pay period. Information includes:

- Employee identification information
- Pay period information
- Current and year-to-date earnings
- Current hours
- Current and year-to-date taxes
- Current and year-to-date deductions
- Net pay

If employees receive multiple payments for the pay period, they can scroll to see all payments for the pay period.

Employees can see pay information for previous pay periods using the Pay Advice History page. The information available on the page is based on the date your enterprise implemented Interactive Employee. The Pay Advice History page lists pay dates and net pay for past pay periods beginning with the date Interactive Employee was implemented. Clicking the date displays the pay information for that payment date. In addition, employees can search the database by entering a date. The system then displays detailed pay information for the first payment date on or after the date entered.

The payroll administrator maintains the Pay Information databases used to display current and historical pay information. The amount of history available to an employee depends on the number of pay periods since Interactive Employee was implemented and how much history is being maintained on the Pay Information database.

Note *Because Interactive Workforce was designed to handle either HED 999 or 998 as the remaining net pay HED, the Payroll administrator must complete the Set up Direct Deposits function on the Payroll Admin menu page. Unless Interactive Workforce knows which HED to display as the Net Pay HED, the pay functionality will not work.*

Important: To use the current history functionality, you must retain the history and labor records from the Pay run. To do this you must have entered anything other than zero (0) on the second Company Options form (AF-SCR) in the field "months retained." Also, do not use the batch purge option in the same run as the Report Generator extract.

☞ *Refer to Data Load of the Pay Information Database, and Payroll Run Changes in the Technical Administration of Interactive Workforce documentation for more information on the Pay Information database.*

How the data is loaded into the Pay Information database

Data is loaded into the Pay Information database tables in two steps. The first step involves using delivered Report Generators to extract the required data from Payroll Administration during the payrun process and save it to text files. The report generators were added during the installation of Interactive Employee but will need to be loaded into the P20IN and scheduled through the Report Requests form (DD-SCR). The second step requires the Interactive Workforce technical administrator to run a script to bulk load the information into the appropriate Pay Information database tables.

Information stored in these database tables includes:

- Basic Pay (PayInfo Basic): period start and end dates, salary rate and amount, organization country code, and check number.
- Employee (PayInfo Employee): Social Security number or Social Insurance number, name prefix (Ms., Mr., Dr., and so forth) first name, middle name, last name, name suffix (Sr., Jr., and so forth).
- Earnings and Deductions (PayInfo Earnings and Deductions): HED number and description, current and year-to-date amounts for all earnings and deductions, and current hours/units for earnings.
- Tax Information (PayInfo Taxes): marital status, number of dependents, and tax amounts for the current year and year-to-date.

Checks issued between payroll runs

The Pay Information database is updated only during payroll runs. Therefore, if your organization voids, issues, or reissues any checks between payroll runs, your database administrator must go into the Pay Information database and manually delete the complete record for any cancelled checks and add a complete record for any manually created checks.

The next time you perform a pay run and update the Pay Information database, the year-to-date totals will be accurate.

☞ *Refer to the Interactive Workforce: Technical Implementation documentation for more information on the Pay Information database.*

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Setting up direct deposit HEDs

If you have been assigned the Payroll administrator role for Interactive Workforce, when you log on, the Navigator displays an Administrator link. When you click this link, the administrator functional areas display.

To set up direct deposit HEDs for organizations, follow these steps.

1. Access the Set up Direct Deposit page

On the Administrator area of the Navigator, select Payroll then click Set up Direct Deposit. The system displays the Set Up Direct Deposit Step 1 page. The page displays all organizations for which you can set up direct deposit information.

Administrator ► Payroll ► Direct Deposit HED Setup ► Set up Direct Deposit - Step 1 of 2

For practice, access the Set Up Direct Deposit - Step 1 of 2 page.

2. Select an organization

The system displays all organizations whose information has been loaded into Interactive Workforce. Click the name of the organization for which you want to set up direct deposit HEDs.

For practice, click 999999 Acme Manufacturing.

3. Select the direct deposit categories for the organization

The page displays the Category 53 HEDs set up in Payroll Administration for the organization you selected. Check the appropriate account type for the HED. The chart that follows shows the account types you can select and the constraints for each.

	Primary Account used for Remaining Net Pay	**Expense Reimbursement Account**	**Secondary Accounts**
Allowable HEDs	999 or 998	999	998 if 999 is used as Primary Account and HEDs 501 to 997

For practice, click 999 for the Primary Account, do not set up an HED for the Reimbursement Account, and then check the two remaining HEDs as Secondary Accounts.

4. Check the Remaining Net Pay Account

Click the Remaining Net Pay Account checkbox to set up the account as the account that receives the net pay remaining after all deductions and deposits to other accounts.

Note: *If you do not check this checkbox, users will not be able to view their pay information online using Interactive Workforce.*

5. Change the name of the HED

If you want to change the name of the HED to something more appropriate for your organization, delete the existing name and enter the new name. The name should be descriptive of your use of the HED. The new name displays only in Interactive Payroll and does not affect Payroll Administration. If you do not want to change the name of the HED, go to the next step.

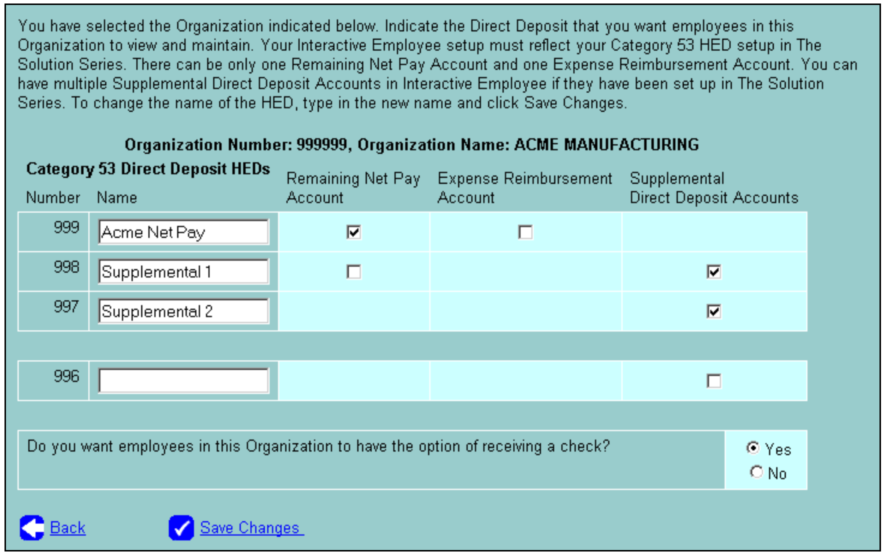
For practice, change the name of HED 999 to Acme Net Pay.

6. Click the appropriate radio button to indicate whether your organization allows employees to receive paychecks

At the bottom of the page click Yes if your organization allows employees to receive a check. Click No if employees must have their pay deposited into an account at a financial institution.

For practice, click No.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



7. Click Save Changes

Click Save Changes to save the parameters you set. Employees of the organization will be able to view and maintain their deposit information based on the choices set on the Set Up Direct Deposit - Step 2 of 2 page.

OR

Select another function

If you don't want to save your changes, select another function from the Navigator.

For practice, click Save Changes.

See also:

- Considerations when setting up direct deposit rules ***(on page 110)***

For more information about direct deposit rules.

Review of Questions Answered

1. What changes were made to payroll runs for Interactive Workforce and why?

2. How is the Pay Information database populated, and what is its purpose?

3. What payroll administration function must be set up to use the Direct Deposit and Reimbursement accounts in Interactive Workforce?

CHAPTER 8

Interactive Workforce Benefits Administration

In This Chapter

Introduction

This section explains the benefits enrollment process and the set up required for benefits enrollment including using Benefits Administration flex master plans and logically organizing how welfare benefit plan information displays to users in Interactive Benefits. Using the benefits administration tasks you enter or update Interactive Benefits to incorporate an organization's benefit rules. This includes organization-specific information, such as valid enrollment periods and open enrollment dates, as well as benefit plan information specific to the organization.

As the Benefits Administrator, you set up a number of employee benefits functions that work in conjunction with Benefits Administration. To clarify the purpose of the tasks, the concepts in this section cover several different categories of information. These categories are:

- Understanding the relationship between Interactive Benefits and Benefits Administration
- Implementation considerations
- Ongoing administrative tasks

If you are implementing Interactive Benefits, we recommend you read all the concepts in this section. However, for ongoing use we have categorized the concepts to help you quickly find the relevant information.

Concept	Interactive Workforce & /ST	Implemen-tation	On-going
Welfare benefit plans available in Interactive Benefits (on page 122)	X		X
Initial enrollment in benefits compared to open enrollment (on page 123)		X	X
Displaying welfare benefit plan information to employees (on page 124)			X
Select organizations and flex master plans (on page 130)		X	X
Maintain flex master plan information (on page 133)		X	X
Maintain welfare benefit plan information (on page 135)		X	X
Set up beneficiary numbering (on page 138)		X	
Maintaining dependent coverage options (see "Maintain dependent coverage options" on page 139)		X	X

Tasks

This section explains the following:

- Managing benefit plan groups
- Managing benefit plan subgroups
- Maintaining display order of groups and subgroups
- Selecting flex master plans
- Maintaining flex master plan information
- Maintaining benefit plan information
- Setting up beneficiary numbering
- Maintaining dependent coverage options

Prerequisites

Before you can access the Benefits Administration tasks, you must have the benefits administrator role assigned to you.

Questions answered

The following questions are answered in this section:

1. What benefits functionality does Interactive Benefits provide to employees?
2. What function does the flex master perform in Interactive Benefits?
3. What is the purpose of subgroups and groups?
4. How do you set the order in which benefits information displays to employees?
5. What controls the organizations and flex master plans that display on the 'Select flex master plans' page?
6. What welfare benefit plan information is maintained in Interactive Benefits and why?
7. How does Interactive Benefits give you control over beneficiaries' ID numbers?
8. How does Interactive Benefits determine whether to display a page for dependent information during the benefits enrollment process?

Welfare benefit plans available in Interactive Benefits

Interactive Benefits contains all the structure and functionality needed to implement employee online enrollment in welfare benefit plans such as:

- Medical insurance
- Dental insurance
- Vision insurance
- Life insurance
- Disability insurance
- Flexible spending accounts

Employees may also use Interactive Benefits to view the plans for which they are eligible to participate, to view current and future-dated enrollments, and to view flexible spending account balances.

Interactive Benefits works with information already established in Benefits Administration to provide employees with benefits-related information.

Initial enrollment in benefits compared to open enrollment

Newly hired employees may be able to enroll in benefits immediately or shortly after being hired based on your organization's rules. They have a window of time from the date of their employment in which to complete their benefits enrollments. This benefit enrollment process is called initial enrollment.

Existing employees who have previously enrolled in, or declined, benefit coverage, must wait until open enrollment unless they experience a life status change that affects their benefits eligibility. Open enrollment is a window of time during which all existing employees in the organization have the opportunity to select their benefit coverage options for the following 12 months.

Initial enrollment in benefits

Using the Maintain Flex Master Plan Information functionality in the benefits administration functions, you set the number of days after the date of employment that initial enrollment in benefits is available. Newly hired employes can then access benefits enrollment pages for that window of time. The following benefit enrollment links display on the Navigator for newly hired employees:

- Important Information about Benefits Enrollment
- Benefits Eligibility
- Enroll in Benefits

Displaying welfare benefit plan information to employees

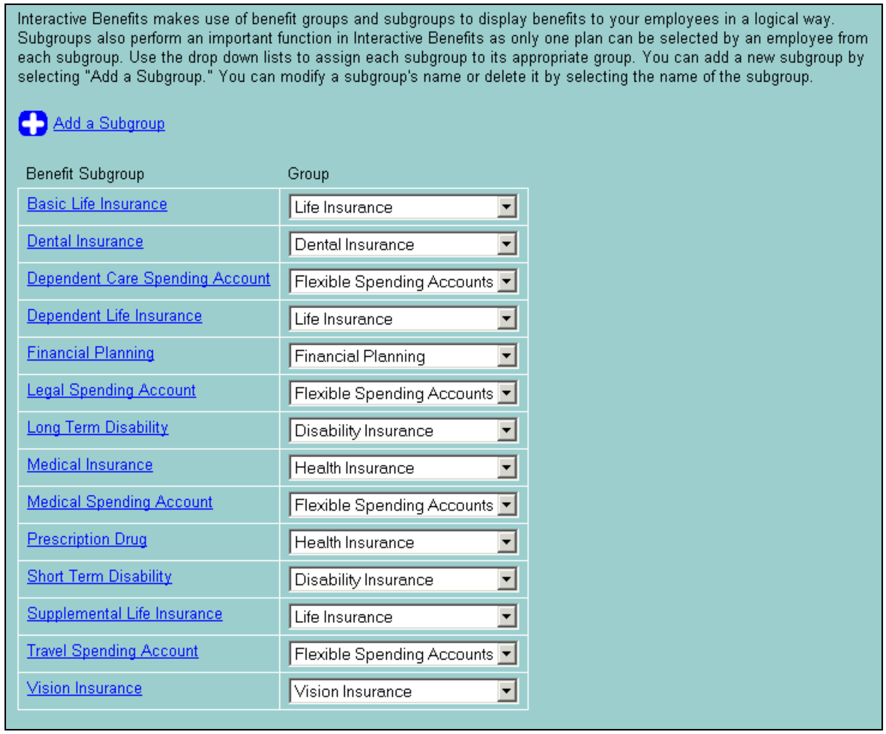
Using Interactive Benefits employees can view the welfare benefit plans for which they are eligible and enroll in benefits. You use a number of the benefits administrative functions to determine how welfare benefits information appears on the enrollment pages and the order in which plans display. The initial building blocks of the benefit options are welfare benefit plan groups and subgroups. Once you establish groups and assign subgroups to a group you can set the order in which the groups and subgroups appear and the plans that appear in each subgroup on the benefit enrollment pages.

Determine how to group welfare benefit plans

Using Interactive Benefits you classify welfare benefit plans into groups and subgroups to logically organize the way the plans display to employees. When installed, the application includes the following groups:

- Dental Insurance
- Disability Insurance
- Flexible Spending Accounts
- Health Insurance
- Life Insurance
- Vision Insurance
- Other
- Unassigned

You can delete groups, change the name of groups, and add groups using the benefits administrative functions. Once you establish the groups based on your organization's needs, you set up subgroups within the groups.

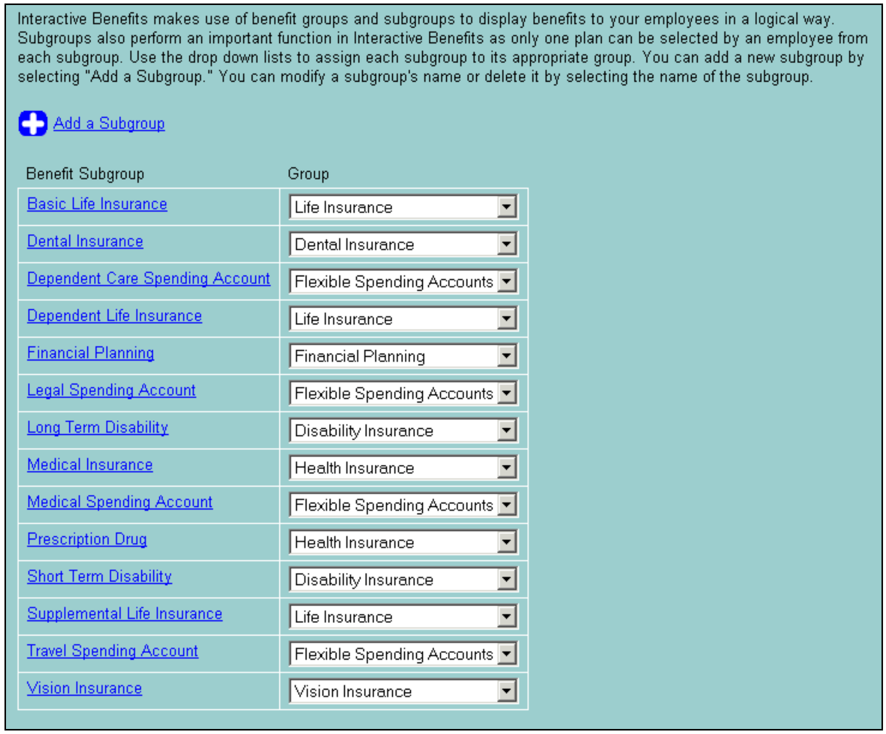


Determine subgroups for the welfare benefit plan groups

You assign subgroups of welfare benefit plans to each group. For example, you could assign the Basic Life and Supplemental Life insurance subgroups to the group Life Insurance. When installed, Interactive Benefits includes the following subgroups:

- Basic Life Insurance
- Deferred Plans
- Dental
- Dependent Care Spending Account
- Dependent Life
- Financial Planning
- Legal Spending Account
- Long Term Care
- Long Term Disability
- Medical Insurance
- Medical Spending Account
- Prescription Drug
- Short Term Disability
- Supplemental Life Insurance
- Travel FSA
- Vision

These delivered subgroups initially belong to the Unassigned group. Using the benefits administrative functions, you assign each subgroup to a group. You can also delete subgroups, change the names of subgroups, add subgroups and reassign subgroups. You then set the display order of the benefits information and determine what welfare benefit plans display under each subgroup.



Set the display order of benefits information

After defining the groups and their subgroups, you assign each welfare benefit plan to the appropriate subgroup. The actual welfare benefit plans in which employees may enroll display under their subgroup. For example, an employee enrolling in benefits would see the heading for the group, Health Insurance; under that group would appear the heading for the subgroup, Medical. Interactive Benefits displays the medical plans associated with that organization's flex master and for which the employee is eligible to participate. The plans appear under the Medical subgroup. From this list of plans the employee chooses one medical plan.

Note *When you assign benefit plans to subgroups, do not include in the same subgroup plans that employees can waive and plans that employees cannot waive. This plan parameter is set in the Option field on the Option/Resulting Plan Status Rules form (TTOSCR) in Benefits Administration.*

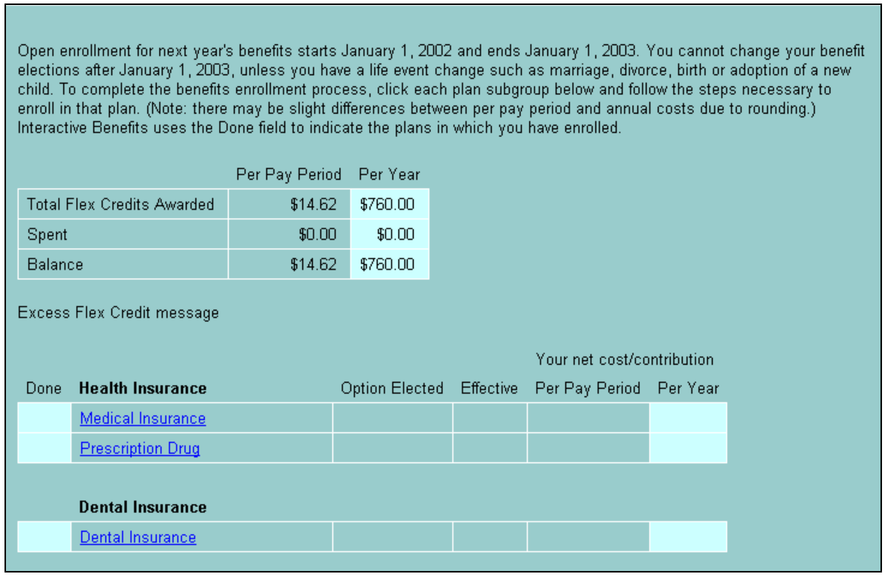
After setting the logic for grouping your welfare benefit plans, you choose a display order for the groups of benefits and for the subgroups to display in that group by entering a number for each group and subgroup. The number determines the order in which the group and subgroup displays. For example, you may want health insurance plans to display before life insurance plans. Employees, however, can enroll in benefit plans in any order they choose.

Grouping your benefit plans into groups and subgroups is important so they can be displayed to your employees in an understandable way. The display order of these groups and subgroups is another way to help your employees select the appropriate benefit plan. Indicate the order in which you want your benefit groups and subgroups displayed by assigning the appropriate number.

Group Display Order		Subgroup Display Order	
2	Dental Insurance	1	Dental Insurance
5	Disability Insurance	1	Long Term Disability
		2	Short Term Disability
7	Financial Planning	1	Financial Planning
6	Flexible Spending Accounts	2	Dependent Care Spending Account
		3	Legal Spending Account
		1	Medical Spending Account
		4	Travel Spending Account
1	Health Insurance	1	Medical Insurance
		2	Prescription Drug
4	Life Insurance	1	Basic Life Insurance
		3	Dependent Life Insurance
		2	Supplemental Life Insurance

Display of pages for benefits enrollment

The page that follows illustrates how benefit information groups and subgroups appear to employees when they enroll in benefits. When the employee clicks a subgroup, the plans in that subgroup display so the employee can select a plan.



Open enrollment for next year's benefits starts January 1, 2002 and ends January 1, 2003. You cannot change your benefit elections after January 1, 2003, unless you have a life event change such as marriage, divorce, birth or adoption of a new child. To complete the benefits enrollment process, click each plan subgroup below and follow the steps necessary to enroll in that plan. (Note: there may be slight differences between per pay period and annual costs due to rounding.) Interactive Benefits uses the Done field to indicate the plans in which you have enrolled.

	Per Pay Period	Per Year
Total Flex Credits Awarded	$14.62	$760.00
Spent	$0.00	$0.00
Balance	$14.62	$760.00

Excess Flex Credit message

Done	Health Insurance	Option Elected	Effective	Your net cost/contribution Per Pay Period	Per Year
	Medical Insurance				
	Prescription Drug				
	Dental Insurance				
	Dental Insurance				

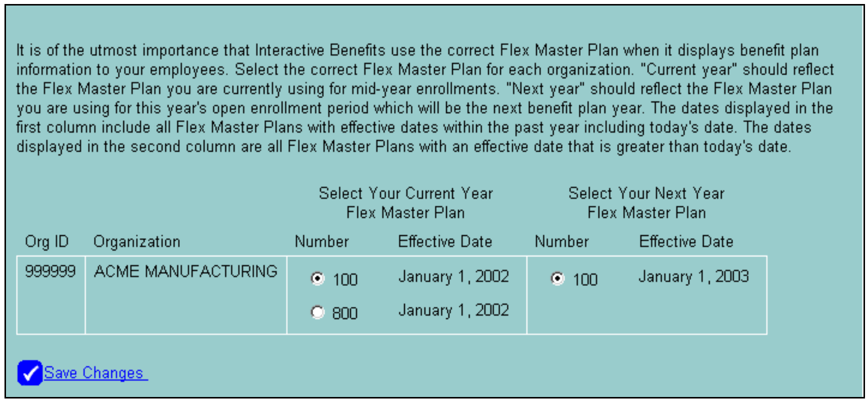
See also:

- Changing a Group Name or Deleting a Group ***(on page 141)***
For detailed directions on managing plan groups and subgroups, one of the tasks required to display welfare benefit plan information for users of Interactive Benefits.

- Maintaining display order of groups and subgroups ***(on page 146)***
For detailed directions on maintaining the display order of groups and subgroups, one of the tasks required to display welfare benefit plan information for users of Interactive Benefits.

Select organizations and flex master plans

Your company may be divided into various organizations, for example corporate headquarters and regional branches. Each organization could use a different flex master set up in Benefits Administration, and each flex master could contain different plans. Before maintaining flex master or benefit plan information, you must select or verify the flex master used by each organization for the current and the next benefit plan years.



Only organizations selected by the Interactive Benefits administrative function, Select Organizations for Load, display on the Select Flex Master Plan page. The available flex master plans, identified by number, display for each organization. When you select a flex master for an organization, the welfare benefit plans that are components of that flex master become available for benefits enrollment by employees in that organization.

The selected radio button for the flex master identifies the flex plan chosen for the current and next plan years. Only one flex master can be selected for the current plan year and one for the next plan year. Completion of this page is key to completing the remainder of the tasks required to display benefit information to employees. You must correctly verify the organizations and flex master plans. Once you enter information on this page and complete the other tasks required to display benefit enrollment information to employees, changing your choices on this page requires additional steps. If you:

- Save Changes on this page,
- Update the flex master plan information using the Maintain Flex Master Plan Information pages,
- Update any associated benefit plans using the Maintain Benefit Plan Information,

then to change to a different flex master plan, you must re-key the information of the flex master plan you want to use. You will also have to update the Maintain flex master plan Information and Maintain Benefit Plan Information pages for the flex master plan you want to use.

Note *Interactive Benefits allows no more than 33 plans within a flex master although Benefits Administration allows you to exceed this number. If a flex master has more than 33 plans and you select that organization and flex master, Interactive Benefits does not display an error message. However, when users of that organization enroll in benefits, they will receive a system error message and be unable to save their benefit enrollments.*

Note *Selections on this page control the welfare benefit plans available to employees for initial and open enrollment in benefits. It is crucial that this page be set up correctly for each organization.*

Credits Information

If your organization offers a flexible benefits plan, your employer determines how to calculate an employee's eligibility for flex credits. Following are some ways in which flex credits can be calculated.

No credits: You may not receive flex credits. For example, your organization may not allow flex credits for part-time employees. In this case if you are a part-time employee, you may have to pay the entire cost. However, because the plan is a group plan, the cost is usually considerably less expensive than an individual plan in which you would enroll if group coverage from your employer was not available.

Deduct credits by plan: For some plans your employer determines your credit amount in advance. The credits appear as earnings and plan costs appear as separate deductions on your paycheck.

Net credits: For other plans your employer may not determine the credits available until calculating the cost of your benefits. If the cost of benefits is greater than the credits, a deduction will be taken from your pay and appears on your paycheck. If the cost of benefits is less than the credits, an earning is applied to your paycheck.

As you enroll in welfare plans, Interactive Benefits applies credits to the plan costs. After you complete enrollment the system shows the cost of enrollments and credits your earnings for any credits unused or deducts the amount not covered by credits from your paycheck.

When enrolling in benefits, Interactive Benefits always displays the cost of your benefits before you complete enrollment. If the cost is more than an amount that is comfortable for you, you can cancel your entries and begin the enrollment process over.

See also:

- Maintaining flex master plan information ***(on page 151)***

For detailed directions on displaying flex credits information to employees.

Transitioning to Interactive Workforce

During the first benefit year in which your company installs Interactive Benefits, employees will not be able to view flexible spending account (FSA) balances for the previous benefit year. Under normal circumstances, Interactive Benefits would display balances for FSA accounts from the previous year until the cut off date for submitting FSA claims. Using the benefits administrator functionality in Interactive Benefits, you can verify the Flex Master Plan for the current benefit year and the next benefit year, but not the previous year. Therefore, Interactive Benefits does not know what the flex master is for the year prior to installation and is not able to retrieve FSA balances for that year. When an employee, using Interactive Benefits during this time period, accesses the FSA balances page, the system displays a statement that he or she was not enrolled in an FSA last year, where in reality the employee may have been enrolled in an FSA.

To avoid confusion, we recommend that you advise your employees of this possibility. Please note that this is only a concern until the claims submission deadline. After the claim submission deadline for the previous year has passed, Interactive Benefits does not attempt to display previous year balance information.

See also:

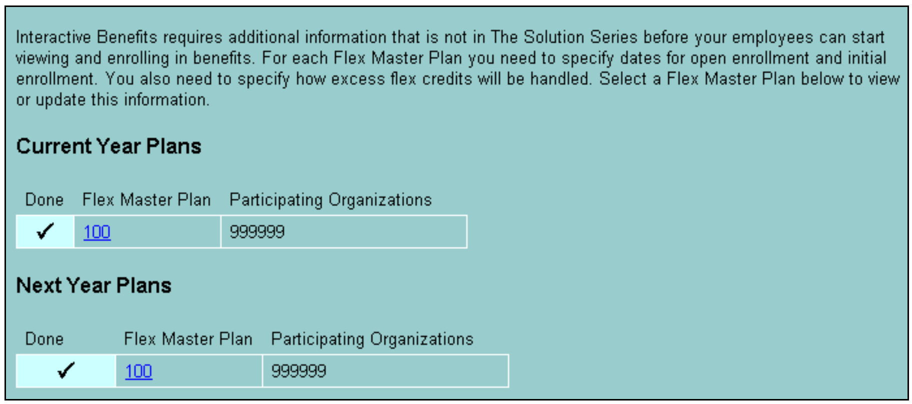
- Selecting organizations and flex master plans ***(on page 149)***

For detailed directions on verifying organizations and flex master plans.

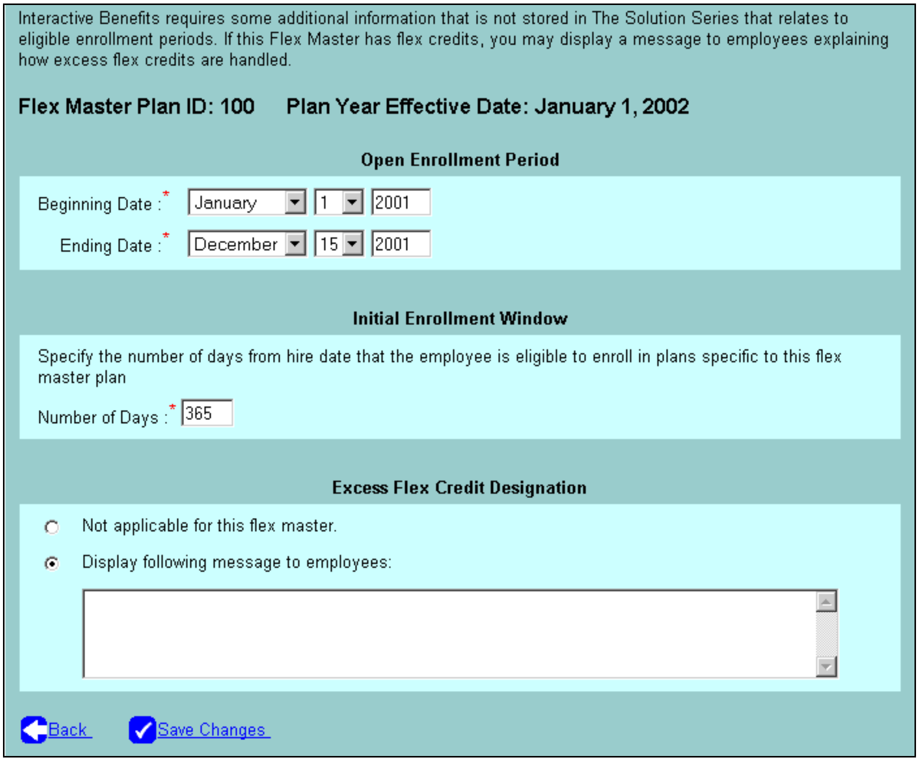
Maintain flex master plan information

Interactive Benefits requires information for benefits enrollment that is not in Benefits Administration. This information for each flex master plan for the current year and for the next year includes enrollment information such as the effective dates of open enrollment and the number of days newly hired employees are eligible to enroll in benefits. Following are the steps you complete to maintain flex master plan information for Interactive Benefits.

1. From the Flex Master Plan Maintenance link access the Maintain Flex Master Plan Information Step 1 page. On this page select the flex master plan for which you want to update information.



2. Maintain flex master plan information. Select the dates for open enrollment in your organization, the number of days during which a new employee can enroll in benefits, and information about flex credits if appropriate to your organization.


Interactive Benefits requires some additional information that is not stored in The Solution Series that relates to eligible enrollment periods. If this Flex Master has flex credits, you may display a message to employees explaining how excess flex credits are handled.

Flex Master Plan ID: 100 Plan Year Effective Date: January 1, 2002

Open Enrollment Period

Beginning Date :* January 1 2001

Ending Date :* December 15 2001

Initial Enrollment Window

Specify the number of days from hire date that the employee is eligible to enroll in plans specific to this flex master plan

Number of Days :* 365

Excess Flex Credit Designation

Not applicable for this flex master.

Display following message to employees:

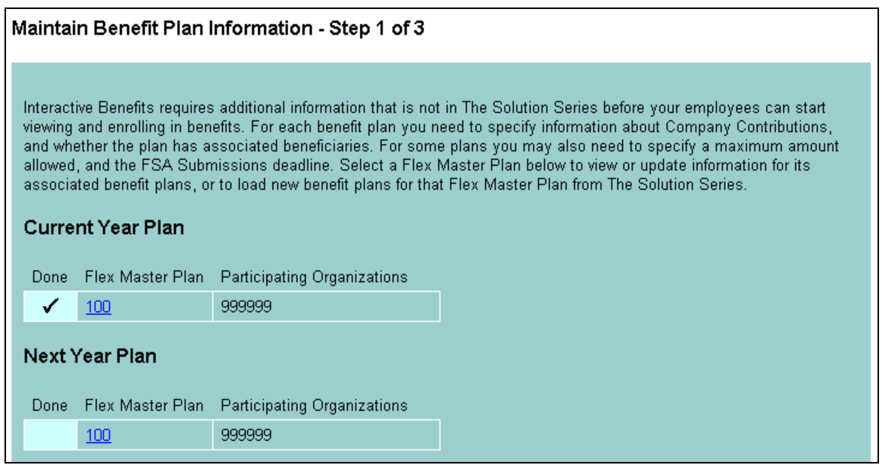
Back Save Changes

Maintain welfare benefit plan information

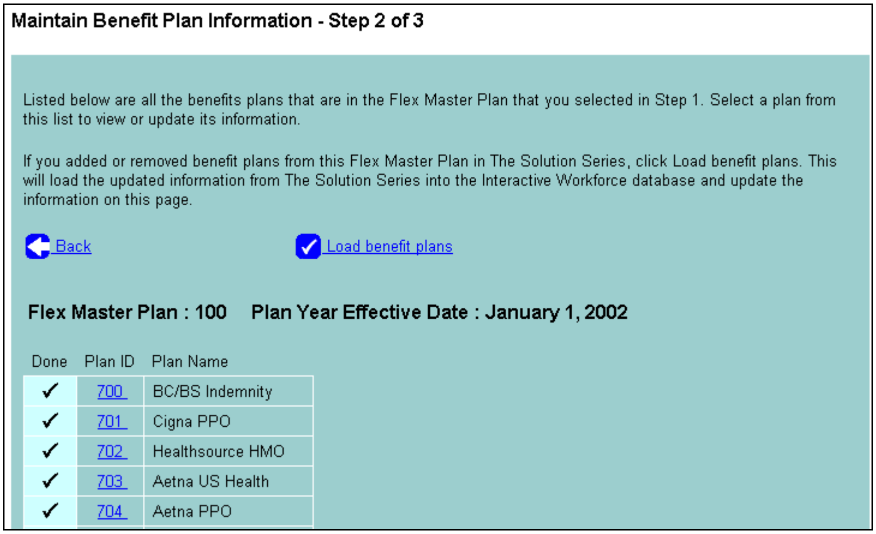
Interactive Benefits uses the welfare benefit plan information set up in Benefits Administration. However, the benefit plan information in Benefits Administration does not contain all the information needed by Interactive Benefits. The plan information you maintain in Interactive Benefits relates only to information the employee uses during benefits enrollment related tasks.

Following are the steps you complete to maintain benefit plan information for Interactive Benefits.

1. From the Benefit Plan Maintenance link access the Maintain Benefit Plan Information Step 1 page. On this page Interactive Benefits displays the flex master for the current year and the organizations to which they apply. Below the current year plan information, the system displays flex master plans for the next benefit year and the organizations to which they apply. The system puts a check in the done column of each flex master as you maintain the flex master's information. The Maintain Benefit Plan Information page follows.



2. Select the benefit plan to maintain. Interactive Benefits displays the benefit plans that make up the flex master you selected. The plans appear in numerical order based on the plan ID. To maintain the benefit plan information needed for Interactive Benefits, select a benefit plan. The system puts a check in the done column of each plan as you maintain the plan's information. A portion of the second page of Maintain Benefit Plan Information follows.



Maintain Benefit Plan Information - Step 2 of 3

Listed below are all the benefits plans that are in the Flex Master Plan that you selected in Step 1. Select a plan from this list to view or update its information.

If you added or removed benefit plans from this Flex Master Plan in The Solution Series, click Load benefit plans. This will load the updated information from The Solution Series into the Interactive Workforce database and update the information on this page.

Back Load benefit plans

Flex Master Plan : 100 Plan Year Effective Date : January 1, 2002

Done	Plan ID	Plan Name
✓	700	BC/BS Indemnity
✓	701	Cigna PPO
✓	702	Healthsource HMO
✓	703	Aetna US Health
✓	704	Aetna PPO

3. Maintain benefit plan information for Interactive Workforce. On the third page of the Maintain Benefit Plan Information, you maintain the following information for each benefit plan:

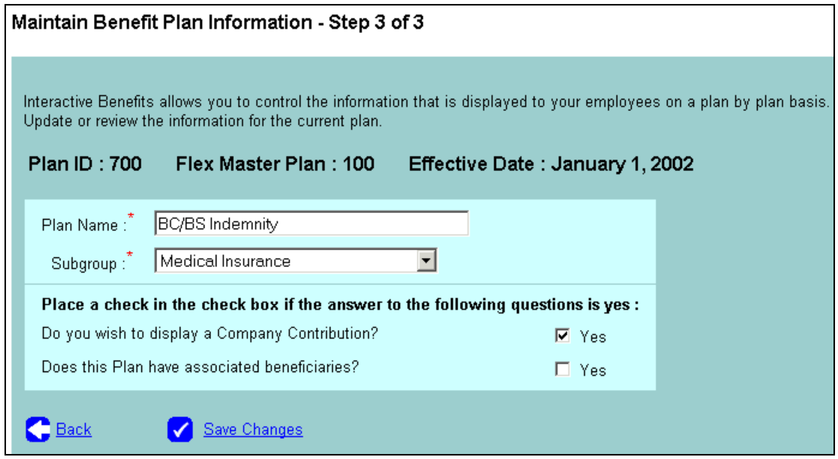
- Change the name of the plan if appropriate. The changed name displays for users of Interactive Benefits enrolling online. However, changing the name of the plan in Interactive Benefits does not affect the plan name in Benefits Administration.
- Choose the subgroup to which the plan belongs.
- If the plan has a company contribution, you can choose whether to display the company contribution to employees during the benefit enrollment process.
- Tell the system whether the plan has associated beneficiaries.
- If the plan requires a variable contribution, enter a maximum variable amount that represents the maximum contribution the employee may make or the maximum amount of coverage the employee may select. If pay periods for employees vary (for example, some are monthly, some semi-monthly, some weekly) for flexible spending accounts, enter the least frequently paid pay period maximum.

Note *The annual maximum variable amount is set on the Your Coverage and Contribution Factors form (TM-SCR) in Benefits Administration. If the amount you enter allows users to enter an amount that exceeds the annual amount set on the Your Coverage and Contribution Factors form, Benefits Administration revises the contribution to equal the annual maximum allowed.*

- If the plan is a flexible spending account, enter the month, day, and year of the last day the employee can submit bills for reimbursement from his or her flexible spending account.

Note *Be sure the Supplemental Pre-tax and Supplemental Post-tax fields have not been used for flex benefits HEDs in Benefits Administration. These fields do not relate to flex benefits plans but rather are used for employee contributions to plans such as 401(k) plans.*

The third page of Maintain Benefit Plan Information follows.



See also:

- Maintaining benefit plan information ***(on page 153)***

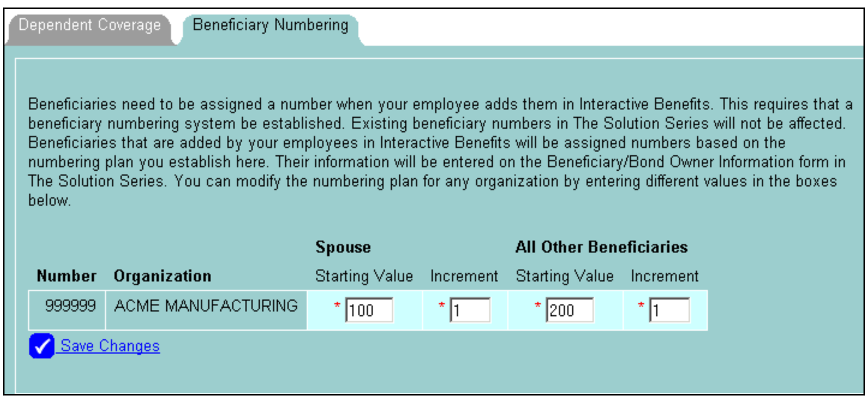
For detailed directions on maintaining benefit plan information.

Set up beneficiary numbering

As part of the benefits process, employees enter information for beneficiaries who will be the recipients of benefits from any plan that includes a death benefit such as life insurance or supplemental life insurance. Interactive Benefits saves the information for each beneficiary and uses a three-position Beneficiary ID number to identify the record so that it may be submitted to Benefits Administration. Use the Beneficiary Numbering page to establish a numbering scheme that allows you to easily identify the type of record (spouse or other beneficiary).

While Benefits Administration does not contain a numbering scheme for beneficiaries, the Beneficiary/Bond-Owner Information form (58-SCR) contains a beneficiary ID. When using Benefits Administration to create these records, HR representatives must manually enter a beneficiary ID number on this form. Before defining a scheme for Interactive Benefits beneficiary numbering, check with your HR department to see if they have set rules for creating beneficiary IDs.

As employees enter new beneficiaries online, the system uses the numbering scheme set up in Interactive Benefits to create beneficiary IDs. The system always checks to be sure the number is not already in use in Benefits Administration. If Interactive Benefits determines that the number is already in use, it will skip to the next available ID number. The Beneficiary Numbering page follows.



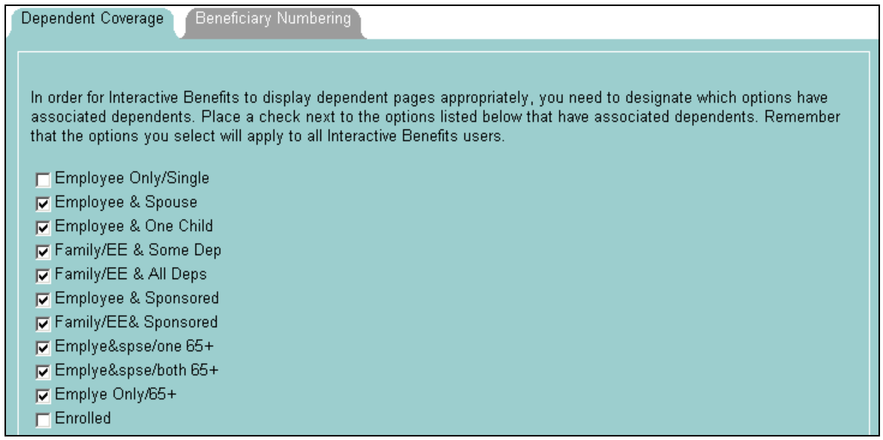
See also:

- Setting up beneficiary numbering ***(see "Setting up dependent numbering" on page 101)***

For detailed directions on setting up beneficiary numbering in Interactive Workforce.

Maintain dependent coverage options

Many welfare plans include options that cover employees' dependents. During enrollment, if the employee chooses an enrollment option that includes dependent coverage, Interactive Benefits displays a page on which employees enter information about their dependents. To display the dependent pages appropriately, you designate the options used by your organization that have associated dependents.



See also:

- Maintaining dependent coverage options ***(on page 157)***

For detailed directions on maintaining dependent coverage options.

Detailed Directions

Note *You must have completed the Guided Practices in the prior sections to guarantee the successful completion of the Guided Practice that follows.*

Tasks

Adding a Benefit Group

If you have been assigned the Benefits administrator role, when you log on, the Navigator displays an Administrator link. Click this link to display the administrator functional areas.

You establish benefit groups such as Dental Insurance, Health Insurance, and Flexible Spending Accounts to display benefits information to employees in a logical way during benefits enrollment. To add the name of a welfare benefit plan group so that the benefit information shows the groups used by your organization, follow these steps:

1. Access the Manage Benefit Plan Groups function

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups. The system displays the Manage Plan Groups page.

Administrator ► Benefits ► Groups and Subgroups ► Benefit Plan Groups ► Manage Benefit Plan Groups

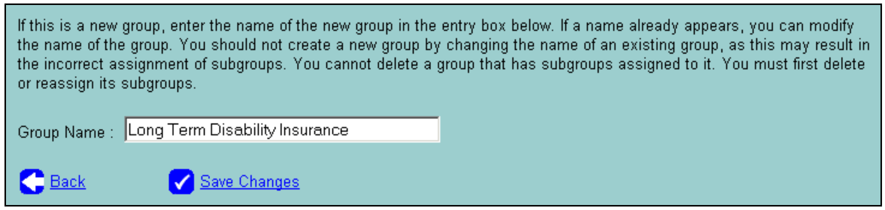
For practice, access the Manage Benefit Plan Groups page.

2. Select Add a Group

Click Add a Group. The system displays the second page of the Manage Benefit Plan Groups. Enter the name of the new group in the Group Name box. The maximum size of the name is 40 alphanumeric characters.

For practice, add the group Long Term Disability Insurance.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. **Click Save Changes**

Click Save Changes to save the new benefit group name. The system displays the Manage Benefit Plan Groups - Step 1 of 2 page, which shows the new benefit group name you entered.

OR

Click Back

If you do not want to add a group or do not want to save your changes, click Back. The system returns you to the Manage Plan Groups first page.

For practice, click Save Changes.

See also:

- Displaying welfare benefit plan information to employees ***(on page 124)***

For an explanation of tasks required to display welfare benefit information for Interactive Benefits users.

Changing a Group Name or Deleting a Group

You establish benefit groups such as Dental Insurance, Health Insurance, and Flexible Spending Accounts to display benefits information to employees in a logical way during benefits enrollment. To change the name of a welfare benefit plan group or delete a group so that the benefit information shows the groups used by your organization, follow these steps:

1. **Access the Manage Plan Groups page**

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups. The system displays the Manage Plan Groups page.

Administrator ► Benefits ► Groups and Subgroups ► Benefit Plan Groups ► Manage Benefit Plan Groups

For practice, access the Manage Plan Groups page.

2. **Select the name of the group**

To change the name of a group or delete the group, click the group name. The system displays the Manage Plan Groups—Step 2 of 2 page with the name of the group displayed.

For practice, select Life Insurance.

3. Change the name of the group

To change the name of the group, highlight the name and enter the new name.

Note *If, in the Group Name box, you type over the system displayed name with the name of a different group and click Delete, Interactive Workforce deletes the group whose name defaulted into the box. The group whose name you typed over the default remains in the list of group names.*

OR

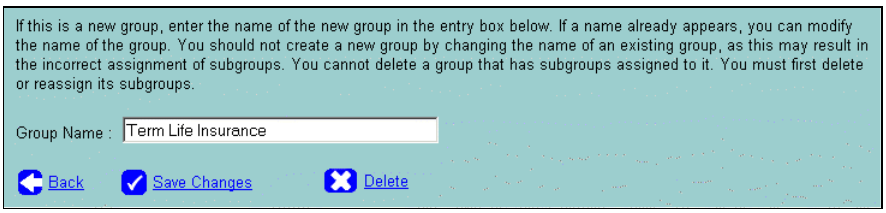
Delete the group

To delete the group, click Delete. The system deletes the group and returns you to the Step 1 of 2 page. The group you deleted no longer appears on the list of plan groups.

Note *If a group has subgroups, you can not delete the group until you unassign the subgroup(s).*

For practice, change the name of the Life Insurance group to Term Life Insurance.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



4. Click Save Changes

Click Save Changes to save the changed benefit group name. The system displays the Step 1 page, which shows the name you entered for the group.

OR

Click Back

If you made no changes or you do not want to save your changes, click Back. The system returns you to the Manage Plan Groups—Step 1 of 2 page.

For practice, click Save Changes.

See also:

- Displaying welfare benefit plan information to employees ***(on page 124)***

For an explanation of tasks required to display welfare benefit information for Interactive Workforce users.

Adding a new subgroup

You establish benefit subgroups such as Medical, Prescription Drugs, Basic Life, and Supplemental Life under a benefit group. Benefit plan information then appears by group and subgroups on the enrollment pages when employees enroll in benefits. To add the name of a welfare benefit plan subgroup, follow these steps:

1. Access the Manage Benefit Plan Subgroups—Step 1 of 2 page

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups then click Benefit Plan Subgroups. The system displays the Manage Benefit Plan Subgroups—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Groups and Subgroups ▶ Benefit Plan Subgroups ▶ Manage Benefit Plan Subgroups—Step 1 of 2

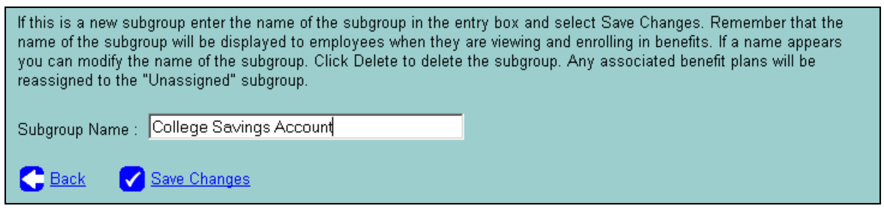
For practice, access the Manage Benefit Plan Subgroups—Step 1 of 2 page.

2. Select Add a Subgroup

Click Add a Subgroup. The system displays the Assign Benefit Plan Subgroups to Groups—Step 2 of 2 page. Enter the name of the new group in the Group Name box. The maximum size of the name is 40 alphanumeric characters.

For practice, add the subgroup College Savings Account.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. Click Save Changes

Click Save Changes to save the new subgroup name. The system displays the Step 1 page, which shows the new benefit subgroup name you entered.

OR
Click Back

If you do not want to add a group or do not want to save your changes, click Back. The system returns you to the Manage Benefit Plan Subgroups—Step 1 of 2 page.

For practice, click Save Changes.

See also:

- Displaying welfare benefit plan information to employees ***(on page 124)***

For an explanation of tasks required to display welfare benefit information for Interactive Workforce users.

Changing the name of a subgroup or deleting a subgroup

You establish benefit subgroups such as Medical, Prescription Drug, Basic Life, and Supplemental Life under a benefit group. Benefit plan information then appears by group and subgroups on the enrollment pages when employees enroll in benefits. Interactive Benefits will only allow employees to enroll in one plan within a subgroup.

The Manage Benefit Plan Subgroups—Step 1 of 2 page displays the names of all the benefits subgroups. The name of the group to which the subgroup is assigned appears to the right of the subgroup name. A drop-down list box displays all groups. Follow these steps to add or delete a subgroup.

1. Access the Manage Benefit Plan Subgroups—Step 1 of 2 page

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups then click Benefit Plan Subgroups. The system displays the Manage Benefit Plan Subgroups—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Groups and Subgroups ▶ Benefit Plan Subgroups ▶ Manage Benefit Plan Subgroups—Step 1 of 2

The Manage Benefit Plan Subgroups—Step 1 of 2 page displays the benefits subgroups delivered with Interactive Workforce and the group to which the subgroup belongs.

For practice, access the Manage Benefit Plan Subgroups—Step 1 of 2 page.

2. Select the name of the subgroup

To change the name of a subgroup or delete the subgroup, click the subgroup name. The system displays the Manage Benefit Plan Subgroups—Step 2 of 2 page with the name of the subgroup displayed.

For practice, select Basic Life Insurance .

3. Change the name of the group

To change the name of the subgroup, highlight the name and enter the new name.

Note *If, in the Subgroup Name box, you type over the system displayed name with the name of a different subgroup and click Delete, Interactive Workforce deletes the subgroup whose name defaulted into the box. The subgroup whose name you typed over the default remains in the list of subgroup names.*

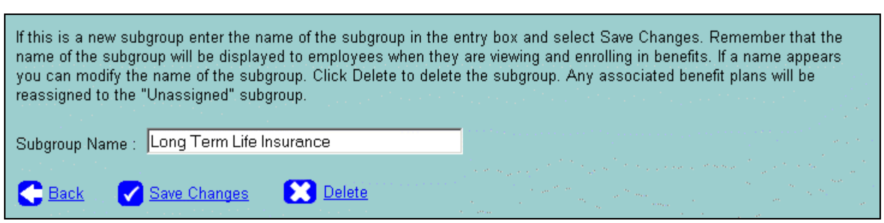
OR

Delete the group

To delete the group, click Delete. The system deletes the group and returns you to the Step 1 of 2 page. The group you deleted no longer appears on the list of subgroups.

For practice, change the name of the subgroup to Long Term Life Insurance.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



4. **If you changed the subgroup name, click Save Changes**

Click Save Changes to save the changed subgroup name. The system displays the Step 1 page, which shows the name you entered for the subgroup.

OR

Click Back

If you do not want to save your changes, click Back. The system returns you to the Manage Benefit Plan Subgroups—Step 1 of 2 page.

For practice, click Save Changes.

See also:

- Determine subgroups for the welfare benefit plan groups ***(on page 125)***

For information on displaying welfare benefit information for Interactive Workforce users.

Reassigning a subgroup to a group

You establish benefit subgroups such as Medical, Prescription Drug, Basic Life, and Supplemental Life under a benefit group. Benefit plan information then appears by group and subgroups on the enrollment pages when employees enroll in benefits. Interactive Workforce will only allow employees to enroll in one plan within a subgroup.

The Manage Benefit Plan Subgroups—Step 1 of 2 page displays the names of all the benefits subgroups. The name of the group to which the subgroup is assigned appears to the right of the subgroup name. A drop-down list box displays all groups. Follow these steps to reassign a subgroup to a different group.

1. **Access the Manage Benefit Plan Subgroups—Step 1 of 2 page**

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups then click Benefit Plan Subgroups. The system displays the Manage Benefit Plan Subgroups—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Groups and Subgroups ▶ Benefit Plan Subgroups ▶ Manage Benefit Plan Subgroups—Step 1 of 2

The Manage Benefit Plan Subgroups—Step 1 of 2 page displays the benefits subgroups delivered with Interactive Workforce and the group to which the subgroup belongs.

For practice, access the Manage Benefit Plan Subgroups—Step 1 of 2 page.

2. **Select another group**

Interactive Workforce displays the name of all groups in a drop down list box to the right of the subgroup name. Click the arrow to display the list. Select the new group to which you want to assign this subgroup.

For practice, assign the Long Term Disability subgroup to the Health Insurance group.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:

Benefit Subgroup	Group
Basic Life Insurance	Life Insurance
Dental Insurance	Dental Insurance
Dependent Care Spending Account	Flexible Spending Accounts
Dependent Life Insurance	Life Insurance
Financial Planning	Financial Planning
Legal Spending Account	Flexible Spending Accounts
Long Term Disability	Health Insurance

Click Save Changes

Click Save Changes to assign the subgroup to the group you selected. The system displays the Assign Plan Subgroups to Groups page, which shows the subgroup assigned to the group you selected.

OR

If you do not want to reassign a benefits subgroup to a group, click Back

The system returns you to the Manage Benefit Plan Subgroups—Step 1 page. If you entered information in any field before clicking Back, the system tries to validate the information even though the information will not be saved. So either delete or correct the information, and then click Back.

For practice, click Save Changes.

See also:

- Set display order of benefits information ***(see "Set the display order of benefits information" on page 127)***

For information on displaying welfare benefit information for Interactive Workforce users.

Maintaining display order of groups and subgroups

You establish benefit groups and subgroups to display benefits information to employees in a logical way for benefits enrollment. The Display Order page allows you to determine the order in which the benefit group displays and the order in which the subgroups assigned to each benefit group display to users.

Note *Unassigned subgroups do not display on this page.*

Follow these steps to set the order in which the groups and their subgroups display.

1. Access the Display Order page

On the Administrator area of the Navigator, select Benefits and click Groups and Subgroups then click Display Order.

Administrator ▶ Benefits ▶ Groups and Subgroups ▶ Display Order

The Maintain Display Order page displays all benefit groups and the subgroups assigned to them.

For practice, access the Display Order page.

2. Change the order in which the benefits groups display

The number in the Display Order column to the left of the Group name indicates in what order the benefits group displays in relation to other groups on the employee's Enroll in Benefits page. If necessary, use the scroll bar to view all benefit groups.

To change the order, change the number in the Display Order box.

For practice, change Dental Insurance to 1 and Health Insurance to 2.

3. Change the order in which the subgroup of benefits display for a benefits group

The subgroup column displays all subgroups that have been assigned a valid group. The number in the Display Order column to the left of the Subgroup name indicates in what order this subgroup of benefits displays within each group. To change the order in which a particular subgroup displays, change the number in the Display Order box.

Note *If you created a new subgroup for which you have not yet assigned a display order number, the number defaults to 9999 and will display last within a group until you assign a display order to the subgroup.*

For practice, reverse the order of the subgroups in the Health Insurance group.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:

Group Display Order		Subgroup Display Order	
1	Dental Insurance	1	Dental Insurance
5	Disability Insurance	1	Long Term Disability
		2	Short Term Disability
7	Financial Planning	1	Financial Planning
6	Flexible Spending Accounts	2	Dependent Care Spending Account
		3	Legal Spending Account
		1	Medical Spending Account
		4	Travel Spending Account
2	Health Insurance	2	Medical Insurance
		1	Prescription Drug
4	Life Insurance	1	Basic Life Insurance
		3	Dependent Life Insurance
		2	Supplemental Life Insurance
9999	Unassigned		
3	Vision Insurance	1	Vision Insurance

Save Changes

Click Save Changes. The system saves your changes. If any display order box does not have a display order number, the system does not allow you to save your changes.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, select another function from the Navigator.

See also:

- Set the display order of benefits information ***(on page 127)***

For information on displaying welfare benefit information for Interactive Workforce users.

Selecting organizations and flex master plans

Interactive Benefits uses flex master plans to help you manage your organization's welfare benefit plan information. Flex master plans in Interactive Benefits contain enrollment information such as the effective dates of open enrollment and the number of days newly hired employees are eligible to enroll in benefits. A three-digit number identifies each flex master plan. You can use a different flex master plan for each organization (control 1-2).

The Verify Organizations and flex master plans page displays:

- The list of organizations selected by the Interactive Workforce administrative function, Organization Selection.
- The IDs of the organizations.
- The ID number of the flex master plans available for the organization.
- The date the plan became effective for the current year.
- The date the plan will become effective for the next plan year.

The active radio button for the current year is the flex master plan currently selected for that organization. For the next plan year, Interactive Benefits defaults the number of the flex master plan selected for the current year. Interactive Benefits submits enrollments to Benefits Administration using the selected flex master plan.

Note *You must perform this task before The Solution Series updates any information in the Interactive Workforce database.*

Follow these steps to verify or change the flex master plan for each organization.

1. Access the Select Flex Master Plan page

On the Administrator area of the Navigator, select Benefits and click Benefit Plan Management then click Flex Master Plan Maintenance. The system displays the Maintain Flex Master Plan Information—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Benefit Plan Management ▶ Select Flex Master Plan

For practice, access the Select Flex Master Plan page.

2. Select your current year flex master plan

Check the flex master plan for the current year for each organization. To add or change the flex master plan for the organization click the radio button to the left of the current year flex master plan.

Note *Only organizations selected during the Interactive Workforce administrative function, Organization Selection, display on this page.*

For practice, accept the defaults.

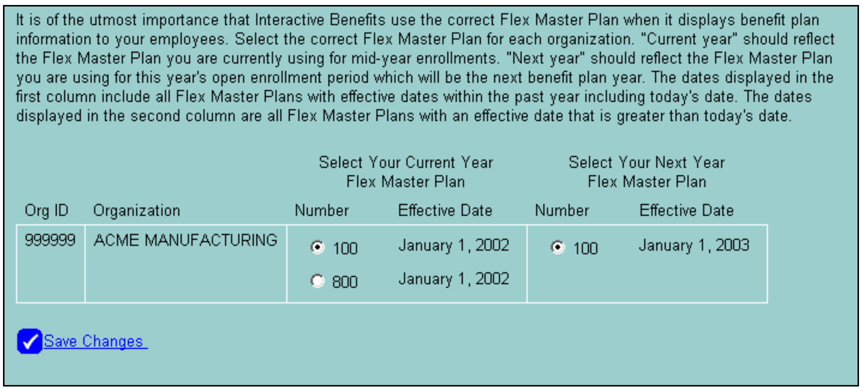
3. Select your next year flex master plan

If this field does not display or is blank, the flex master for the next year has not yet been set up in Benefits Administration. Check the flex master plan for the next benefit year for each organization.

To add or change the flex master plan click the radio button to the left of the next year flex master plan.

For practice, accept the defaults.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



It is of the utmost importance that Interactive Benefits use the correct Flex Master Plan when it displays benefit plan information to your employees. Select the correct Flex Master Plan for each organization. "Current year" should reflect the Flex Master Plan you are currently using for mid-year enrollments. "Next year" should reflect the Flex Master Plan you are using for this year's open enrollment period which will be the next benefit plan year. The dates displayed in the first column include all Flex Master Plans with effective dates within the past year including today's date. The dates displayed in the second column are all Flex Master Plans with an effective date that is greater than today's date.

		Select Your Current Year Flex Master Plan		Select Your Next Year Flex Master Plan	
Org ID	Organization	Number	Effective Date	Number	Effective Date
999999	ACME MANUFACTURING	◉ 100	January 1, 2002	◉ 100	January 1, 2003
		○ 800	January 1, 2002		

Save Changes

4. Click Finished to save your changes

When you have selected current and next year flex plans for each organization, click Finished. The system saves your changes. However, if you did one of the following:

- Clicked Finished on this page
- Updated the flex master plan information on the Maintain flex master plan Information Steps 1 and 2
- Updated any associated benefit plans using the Maintain Benefit Plan Information Steps 1 through 3

then changed to a different flex master plan, you must re-key the information of the flex master plan you want to use. You will also have to update the Maintain Flex Master Plan Information and Maintain Benefit Plan Information pages for the flex master plan you want to use.

OR
Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

Note *Interactive Benefits allows no more than 33 plans within a flex master although Benefits Administration allows you to exceed this number. If a flex master has more than 33 plans and you verify that organization and flex master, Interactive Workforce does not display an* *error message. However, when users of that organization enroll in benefits, they will receive a system error message and be unable to save their benefit enrollments.*

For practice, select another function from the Navigator.

See also:

- Select organizations and flex master plans ***(on page 130)***

For information on selecting organizations and their flex master plans.

Maintaining flex master plan information

Interactive Benefits requires information for benefits enrollment that is not in Benefits Administration. This information for each flex master plan for the current year and for the next year includes enrollment information such as the effective dates of open enrollment and the number of days newly hired employees are eligible to enroll in benefits. Follow these steps to maintain the enrollment information for a flex master plan.

1. Access the Maintain Flex Master Plan Information—Step 1 of 2 page

On the Administrator area of the Navigator, select Benefits and click Benefit Plan Management then click Flex Master Plan Maintenance. The system displays the Maintain Flex Master Plan Information—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Benefit Plan Management ▶ Flex Master Plan Maintenance ▶ Maintain Flex Master Plan Information—Step 1 of 2

For practice, access the Maintain Flex Master Plan Information—Step 1 of 2 page.

2. Select a flex master plan

Click the ID number of the flex master plan whose enrollment information you want to view or change. The system displays the Maintain Flex Master Plan Information—Step 2 of 2 page where you can enter or change the enrollment information.

For practice, click Flex Master Plan 100 for organization 999999.

2. Enter the beginning date and ending date for open enrollment

Use the drop down list boxes to select the month and day, and enter the year that open enrollment begins and that open enrollment ends. These dates are required only if you are completing this step prior to the beginning of open enrollment for your organization.

For practice, use the drop down list boxes to enter October 1, 2002 as the starting date and December 1, 2002 as the ending date.

3. Enter the number of days during which a newly hired employee can enroll in benefits

Enter the number of days from employment date that a newly hired employee is eligible to enroll in benefits. The entry can be between one and three numeric characters. If your company does not impose a time limit on benefits enrollment for new hires, enter 0. You must enter information in this field.

For practice, enter 30.

4. Choose whether to display an excess flex credit message

Click the radio button, 'Display following message to employees', if you want a message about flex credits to display to employees during benefits enrollment.

Note *As delivered, Interactive Benefits does not contain an Excess Flex Credit message. You must create the message.*

If your organization does not use flex credits or excess flex credits are not applicable to this flex master plan, click the radio button, 'Not applicable for this flex master'.

Note *If you checked the radio button to display the excess credits message to employees, you must have a message in the message box to exit this page.*

For practice, click the radio button 'Not applicable for this flex master'.

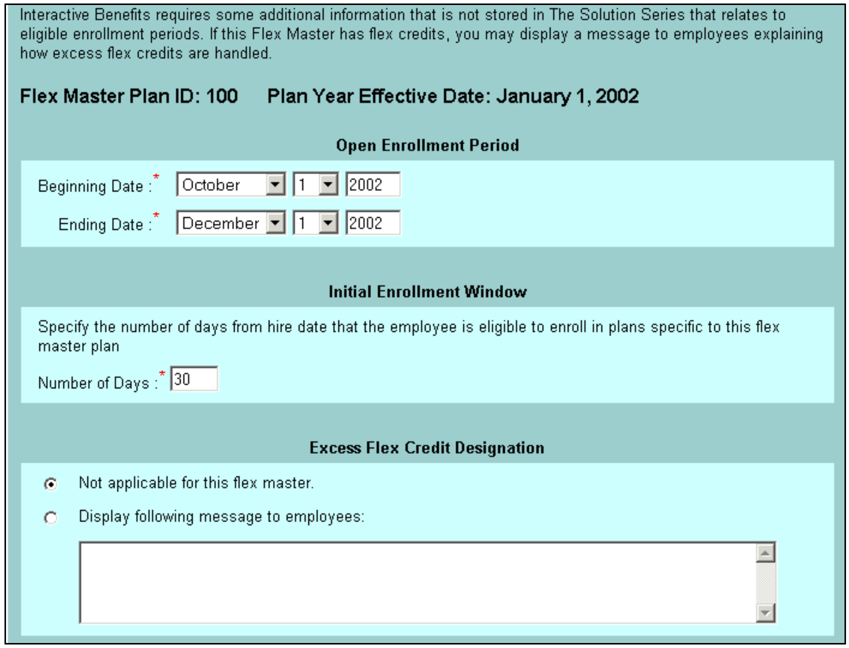
5. View, change, or enter the excess flex credit message

You can change an existing message or enter a new message. The message that displays here will display to employees during the benefits enrollment process. The message should briefly explain what happens to the excess credits balance after the enrollment process has been completed. For example, will the excess credits balance be paid as cash? If the employee uses more than the flex credits provided, will the extra amount be deducted from the employee's pay?

Note *This box must contain a message if you checked the radio button to display the excess credits message to employees. If no message exists, you cannot save your changes.*

For practice, leave this box blank.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



6. Save Changes

Click Save Changes to save the information you entered or changed. The system saves your changes and displays the Maintain Flex Master Plan Information—Step 1 page with a check mark in the Done column for the flex master plan you maintained.

OR

Click Back

If you did not make any changes or you do not want to save your changes, click Back. The system returns you to the Maintain Flex Master Plan Information—Step 1 page.

For practice, click Save Changes.

See also:

- Using benefits flex masters ***(on page 31)***

For an explanation of the use of flex masters in Interactive Workforce.

Maintaining benefit plan information

Interactive Workforce requires benefit plan information for enrollment that is not in Benefits Administration. This information for each benefit plan includes answering questions regarding the display of company contributions, whether the plan requires beneficiary assignments, and flexible spending account information. Follow these steps to maintain benefit plan information.

1. Access the Maintain Benefit Plan Information—Step 1 of 2 page

On the Administrator area of the Navigator, select Benefits and click Benefit Plan Management then click Flex Master Plan Maintenance. The system displays the Maintain Flex Master Plan Information—Step 1 of 2 page.

Administrator ▶ Benefits ▶ Benefit Plan Management ▶ Benefit Plan Maintenance ▶ Maintain Benefit Plan Information—Step 1 of 3

The Maintain Benefit Plan Information—Step 1 page displays a list of the flex master plans by number and the organizations (control 1-2s) that use each master. The information displays for the current year plan and, when applicable, for the next year plan.

For practice, access the Maintain Benefit Plan Information—Step 1 of 3 page.

2. Select a flex master plan

Scroll down the page to view all flex master plans. Click the ID number of the flex master plan that contains the plan information you want to view or change. The system displays the Maintain Benefit Plan Information—Step 2 of 3 page where you can select from a list of all the benefits plans that are in the flex master plan you selected.

For practice, click flex master plan 100, Next Year Plan, for organization 999999.

3. Refresh the page

Click 'Load benefit plans' to refresh the information on the page. When you click Load benefit plans, the system checks the component plans in Benefits Administration to see if any plans have been added or deleted from the flex master and returns the new information to the page. Therefore, it is important that you always click Load benefit plans before proceeding with this task.

For practice, click Load benefit plans.

4. Select a benefits plan

Click the plan ID number of the benefits plan you want to maintain. After you maintain the plan, the system puts a check mark in the Done column on the previous page.

The Maintain Plan Information—Step 3 of 3 page displays:

- The Plan ID number you selected along with its name
- The corresponding flex master plan ID
- The effective date of the plan
- The plan name
- A drop down list of subgroups

Subgroup information displays only if you completed the Maintain Benefit Plan Groups and Maintain Benefit Plan Subgroups pages.

For practice, select 702 for Health Source HMO.

5. Update the information for the benefits plan

Enter or update information in all the appropriate fields. The chart that follows shows the name of the field in the left column and the information you enter in the right column.

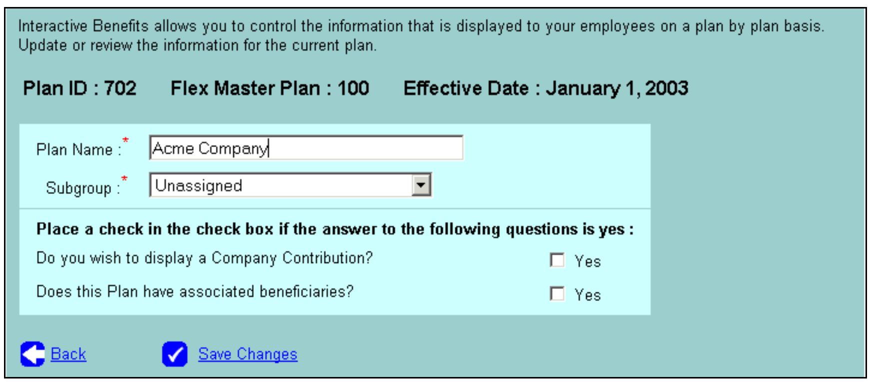
Field/Box	Action/Entry
Interactive Benefits Plan Name	The plan name as entered in Benefits Administration displays in the Interactive Benefits Plan Name box. You can change the name to make it more descriptive when displayed on the employees' benefits enrollment page; however, you must use alphanumeric characters and no symbols. Any change you make does not affect or update the plan name in Benefits Administration.
Interactive Benefits Subgroup	You must assign the plan to a subgroup. Click the arrow to display the drop down list of subgroups and select one for this plan. Although you can assign multiple plans to a subgroup, Interactive Benefits allows employees to enroll in only one plan within that subgroup.
Do you wish to display a Company Contribution	Information for this field applies to Interactive Benefits; however, a company contribution for the plan must be established in Benefits Administration in order to utilize this feature of Interactive Benefits. Click the checkbox to indicate that you want the company contribution to display on the benefit enrollment pages that employees see when enrolling in benefits. If you do not want employees to view the company contribution, leave the checkbox blank.
Does this Plan have associated beneficiaries?	If you check this box, Interactive Benefits includes the assignment of beneficiaries as one of this plan's enrollment steps. Click the checkbox to indicate that the Plan has associated beneficiaries. For example, life insurance plans have beneficiaries. If the Plan does not have associated beneficiaries, leave the checkbox blank.
The following fields display only if the Plan you are maintaining requires a variable entry, for example, a flexible spending account (FSA) plan.	
Maximum Amount	Enter the maximum variable contribution or coverage amount allowed. You may enter up to eight digits, two of which are decimals. If pay periods for employees vary (for example, some are monthly, some semi-monthly, some weekly), for flexible spending accounts enter the least frequently paid pay period maximum.

Field/Box	Action/Entry
Deadline	To specify the FSA claim submission deadline, click the arrow to display the drop down lists. From the lists select the month and day and enter the year by which employees must submit claims to receive funds from their flexible spending account. This date is the last date claims can be submitted for the current year plan.

Note *Entries in the Coverage Rule, Contribution Rule, and Flex Type fields on the Coverage and Contribution Factors form (TM-SCR) in Benefits Administration determine whether the Variable Entry section at the bottom of the Maintain Benefit Plan Information—Step 3 of 3 page displays.*

For practice, after the Interactive Benefits plan name, enter Acme Company, and accept the defaults for the other fields.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



Note *When you assign benefit plans to subgroups, do not include in the same subgroup plans that employees can waive and plans that employees cannot waive. This plan parameter is set in the Option field on the Option/Resulting Plan Status Rules form (TTOSCR) in /ST.*

6. Click Save Changes

Click Save Changes to save the information you entered or changed. The system saves your changes and displays the Step 2 page with a check mark in the done column for the welfare benefit plan and plan year you maintained.

If you:

- Clicked Finished on the Verify Organizations and flex master plans,
- Updated the flex master plan information on the Maintain flex master plan Information Steps 1 and 2, and
- Completed Steps 1 through 3 the Maintain Benefit Plan Information Steps 1 through 3

then to change to a different flex master plan, you must re-key the information of the flex master plan you want to use on the Select Flex Master Plans. Access this function by clicking Select Flex Master Plan on the Navigator. You will also have to update the Maintain Flex Master Plan Information and Maintain Benefit Plan Information pages for the flex master plan you want to use.

OR

Click Back

If you did not make any changes or you do not want to save your changes, click Back. The system returns you to the Step 2 page.

Note *If the benefit plan you selected does not have a valid subgroup assignment, you cannot Save Changes. For example, if you deleted a subgroup that had associated benefit plans or if a new benefit plan was recently added to Benefits Administration, the benefit plan would not have a valid subgroup.*

For practice, click Save Changes.

See also:

- Maintain welfare benefit plan information ***(on page 135)***

For information on maintaining benefit plan information in Interactive Workforce.

Maintaining dependent coverage options

During benefits enrollment Interactive Benefits requires employees to enter dependents for any plan option, such as health insurance, that covers dependents. Use this page to designate the options that have associated dependents. During benefits enrollment a page where employees select the family members who should be covered by the plan displays if the employee selects an option that includes covered dependents. If you do not designate the option using this function, the page does not display during enrollment.

1. Access the Dependent Coverage page

In the Administrator area of the Navigator, click Benefits then click Dependents and Beneficiaries. Select the Dependent Coverage tab.

Administrator ► Benefits ► Dependents and Beneficiaries ► Dependent Coverage

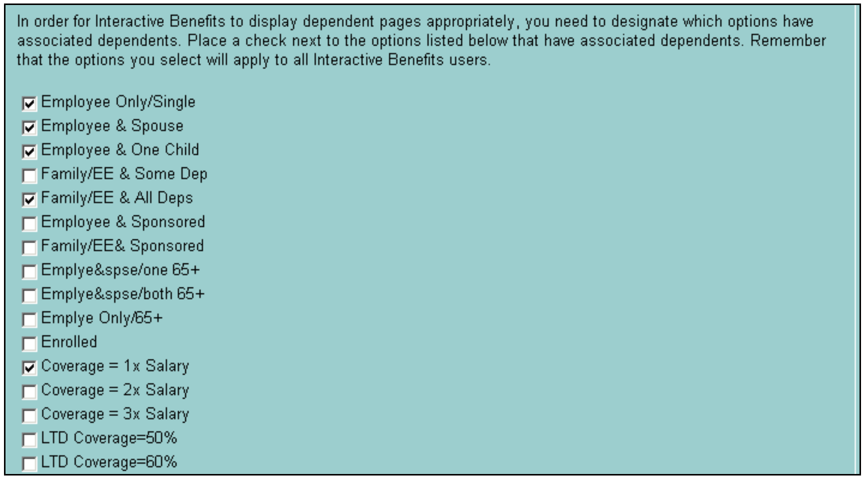
For practice, access the Dependent Coverage page.

2. Select the options that have associated dependents

For each option that has associated dependents, click the checkbox to the left of the option. A check mark in the box indicates that this option has associated dependents.

For practice, enter a checkmark for the following options: Employee Only/Single, Employee & Spouse, Employee & One Child, Family/EE and All Deps; also check Coverage = 1x Salary.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. Click Save Changes

Click Save Changes to save the data you entered.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, click Save Changes.

See also:

- Maintain dependent coverage options ***(on page 139)***

For information on maintaining dependent coverage options in Interactive Workforce.

Setting up beneficiary numbering

Interactive Benefits assigns an identifying number to beneficiaries as employees enter their beneficiaries' information into the system. Use this page to set up a numbering plan for identifying an employee's beneficiaries. The system always checks to be sure the number is not already in use and does not duplicate any beneficiary ID numbers entered in Benefits Administration.

1. Access the Beneficiary Numbering page

In the Administrator area of the Navigator, click Benefits then click Dependents and Beneficiaries. Select the Beneficiary Numbering tab.

Administrator ▶ Benefits ▶ Dependents and Beneficiaries ▶ Beneficiary Numbering

For practice, access the Beneficiary Numbering page.

The Beneficiary Numbering page displays a list of organizations with their control numbers.

2. Enter the numbering scheme for the spouse

For each organization use the Starting Value and Increment fields in the Spouse column to establish a numbering scheme that allows you to easily identify the record of a spouse in Benefits Administration. The table that follows shows the field name in the left column and the action you take in the right column:

Field/Box	Action/Entry
Spouse Starting Value	Enter a number up to three-digits, such as 100, to identify a spouse record or accept the default value. (Default: 100)
Spouse Increment	Enter a one- or two-digit number that the system will use to increment spouse records or accept the default value. (Default: 1)

For practice, enter 100 as the Starting Value and 1 as the Increment for organization 999999.

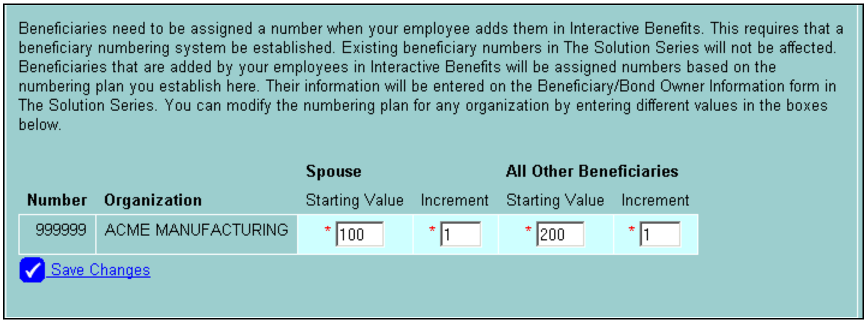
3. Enter the numbering scheme for beneficiaries other than the spouse

Use the Starting Value and Increment fields in the All Other Beneficiaries column to establish a numbering scheme that allows you to easily identify the record of a beneficiary other than a spouse in Benefits Administration. The table that follows shows the field name in the left column and the action you take in the right column.

Field Name	Action to take
Beneficiary Starting Value	Enter a number up to three-digits such as 200 to identify a record for a beneficiary other than a spouse or accept the default value. (Default: 200)
Beneficiary Increment	Enter a one-or two-digit number by which the system will increment beneficiary records or accept the default value. (Default: 1)

For practice, enter 200 as the Starting Value and 1 as the Increment for organization 999999.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



Beneficiaries need to be assigned a number when your employee adds them in Interactive Benefits. This requires that a beneficiary numbering system be established. Existing beneficiary numbers in The Solution Series will not be affected. Beneficiaries that are added by your employees in Interactive Benefits will be assigned numbers based on the numbering plan you establish here. Their information will be entered on the Beneficiary/Bond Owner Information form in The Solution Series. You can modify the numbering plan for any organization by entering different values in the boxes below.

		Spouse		All Other Beneficiaries	
Number	**Organization**	Starting Value	Increment	Starting Value	Increment
999999	ACME MANUFACTURING	* 100	* 1	* 200	* 1

Save Changes

4. **Click Save Changes**

Click Save Changes to save the parameters you set. Beneficiary records saved by Interactive Benefits will use these parameters to set identifying numbers for the records in Benefits Administration.

OR

Select another function from the Navigator

If you made no changes or you do not want to save your changes, select another function from the Navigator.

For practice, click Save Changes.

See also:

- Set up beneficiary numbering ***(on page 138)***

For information on setting up beneficiary numbering in Interactive Workforce.

Review of Questions Answered

1. What benefits functionality does Interactive Benefits provide to employees?

2. What function does the flex master perform in Interactive Benefits?

3. What is the purpose of subgroups and groups?

4. How do you set the order in which benefits information displays to employees?

5. What controls the organizations and flex master plans that display on the 'Select flex master plans' page?

6. What welfare benefit plan information is maintained in Interactive Benefits and why?

7. How does Interactive Benefits give you control over beneficiaries' ID numbers?

8. How does Interactive Benefits determine whether to display a page for dependent information during the benefits enrollment process?

PART 3

Part 3 - Appendices

In This Section

APPENDIX A

Relationship between Interactive Workforce and Administrative Solutions

In This Appendix

About this appendix

This appendix provides tables that show the relationship between forms/fields in The Solution Series and the pages/fields in Interactive Workforce. Using the tables that follow you can map the fields on the Interactive Workforce page to the corresponding fields on the Solution Series forms. Some field in Interactive Workforce are derived from fields in The Solution Series and, as such, do not have a direct one-to-one correlation. Other fields do not exist in The Solution Series and are entered in Interactive Workforce and stored in the Interactive Workforce database or Pay Information database. They are Interactive Workforce specific fields.

The Solution Series forms A8-ESS (Direct Deposit HEDs), ORGESS (Organization Extract), and TP-ESS (Verify Organizations and Flex Master Plans) were developed for Interactive Workforce to retrieve company data from the Employee database (FILE02). A8-ESS, ORGESS, and TP-ESS are designated as private forms because they are invisible to users of The Solution Series. They work 'behind the scenes' and can not be accessed by users. These forms correlate to The Solution Series forms A8-SCR (Company Earnings and Deductions), COLIST (Organization Listing), and TP-SCR (Flex Master/Group Plan Components) and combine information from each of these multi-panelled forms for display on a single Interactive Workforce page. Interactive Manager uses the private forms ME1SCR, ME2SCR, ME3SCR, and ME4SCR to build the Staff Members information.

Interactive Workforce is a North American product. Some differences exist for US and Canadian fields as indicated by the Country column. The 'All' designation indicates that the field is applicable for Canadian and US users.

The tables in the appendix are organized to match the functions available to users of Interactive Workforce and are useful for understanding Interactive Workforce functions. This appendix includes tables for the following functions:

- Personal Details
- HR: Dependent Numbering
- Time Away
- Benefits
- Benefits Enrollment
- Payroll
- New User

☞ *Refer to eCyborg Interactive Workforce: Technical Implementation for additional information on private forms and views created for Interactive Workforce.*

Personal Details Field Information

Marriage Checklist

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Married on	RECORD-DATE	02-SCR	All

Divorce or Legal Separation Checklist

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Marital Status	MARITAL-CODE	02-SCR	All
Effective from	RECORD-DATE	02-SCR	All

Name and Address page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Title	EMP-NAME-PREFIX	FF-SCR	All
First Name	EMP-FIRST-NAME	FF-SCR	All
Middle Name or Initial	EMP-MIDDLE-NAME	FF-SCR	All
Last Name	EMP-LAST-NAME	FF-SCR	All
Suffix	EMP-NAME-SUFFIX	FF-SCR	All
Street Address	ADDRESS ADDRESS-2	FF-SCR	All
City	EMP-CITY-US	FF-SCR	US
City	EMP-CITY-CANADA	FF-SCR	Canada
State	EMP-STATE	FF-SCR	US
Zip Code	EMP-ZIP-CODE	FF-SCR	US
Province	EMP-PROVINCE	FF-SCR	Canada
Postal Code	EMP-POSTAL-CODE	FF-SCR	Canada

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Country	EMP-COUNTRY CODE	FF-SCR	All

Mailing Address page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Title	EMP-NAME-PREFIX	FF-SCR	All
First Name	EMP-FIRST-NAME	FF-SCR	All
Middle Name or Initial	EMP-MIDDLE-NAME	FF-SCR	All
Last Name	EMP-LAST-NAME	FF-SCR	All
Suffix	EMP-NAME-SUFFIX	FF-SCR	All
Street Address	ADDRESS ADDRESS-2	FF-SCR	All
City	EMP-CITY-US	FF-SCR	US
City	EMP-CITY-CANADA	FF-SCR	Canada
State	EMP-STATE	FF-SCR	US
Zip Code	EMP-ZIP-CODE	FF-SCR	US
Province	EMP-PROVINCE	FF-SCR	Canada
Postal Code	EMP-POSTAL-CODE	FF-SCR	Canada
Country	EMP-COUNTRY CODE	FF-SCR	All

Phone, Fax, and Email page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Home Phone	HOME-AREA-CODE HOME PHONE	03-SCR	All
Work Phone	WORK-AREA CODE WORK PHONE	03-SCR	All
Extension	WORK EXTENSION	03-SCR	All
Cell Phone	CONTACT-TYPE-CD	EM-SCR	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Cell Phone	CONTACT-INFO	EM-SCR	All
Fax Number	CONTACT-TYPE-CD	EM-SCR	All
Fax Number	Contact Info	EM-SCR	All
Pager Number	CONTACT-TYPE-CD	EM-SCR	All
Pager Number	CONTACT-INFO	EM-SCR	All
Email Address	CONTACT-TYPE-CD	EM-SCR	All
Email Address	CONTACT-INFO	EM-SCR	All
Confidential Info	CONTACT-CONFID-CD	EM-SCR	All
Colleagues and customers	CONTACT-UNLIST-CD	EM-SCR	All

Family Members page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Family Members listed on the user's The Solution Series file (No Interactive Workforcelabel on this summary page)	OTHER-NAME	10-SCR	All
Family Members listed on the user's The Solution Series file (No Interactive Workforcelabel on this summary page)	RELATIONSHIP-CODE	10-SCR	All
Birth date	OTHER-BIRTH-DATE	10-SCR	All
Social Security Number	OTHER-SSN-1-3 OTHER-SSN-5-6 OTHER-SSN-8-11	10-SCR	US
Social Insurance Number	OTHER-SIN-1-3 OTHER-SIN-5-7 OTHER-SIN-9-11	10-SCR	Canada

Family Member Details page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
First Name	OTHER-NAME	10-SCR	All
Last Name	OTHER-NAME	10-SCR	All
First Name Last Name	OTHER-NAME	10-SCR	All
Relationship	RELATIONSHIP-CODE	10-SCR	All
Birth date	OTHER-BIRTH-DATE	10-SCR	All
Social Security Number	OTHER-SSN-1-3 OTHER-SSN-5-6 OTHER-SSN-8-11	10-SCR	US
Social Insurance Number	OTHER-SIN-1-3 OTHER-SIN-5-7 OTHER-SIN-9-11	10-SCR	Canada
Gender	OTHER-SEX-CODE	10-SCR	All
Student Status	FULL-TIME-STUDENT	10-SCR	All
Other Insurance	INSURANCE-CARRIER	10-SCR	All
Employer	EMPLOYER-NAME	10-SCR	All
Street address	OTHER-ADDRESS-1	10-SCR	All
City	OTHER-ADDRESS-2	10-SCR	US
State	OTHER-ADDRESS-2	10-SCR	US
City State	OTHER-ADDRESS-2	10-SCR	US
ZIP Code	OTHER-ZIP-CODE	10-SCR	US
City	OTHER-ADDRESS-2C	10-SCR	Canada
Province	OTHER-ADDRESS-2C	10-SCR	
City Province	OTHER-ADDRESS-2C	10-SCR	Canada
Postal Code	OTHER-POSTAL-CODE	10-SCR	Canada
Telephone	OTHER-AREA-CODE OTHER-PHONE-NUMBER	10-SCR	All

Emergency Contacts page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Emergency Contacts listed on the user's The Solution Series file (No Interactive Workforcelabel on this summary page)	EMERGENCY-CONTACT	16-SCR	All
Emergency Contacts listed on the user's The Solution Series file (No Interactive Workforcelabel on this summary page)	EMERGENCY-AREA-CODE EMERGENCY-PHONE-NBR	16-SCR	All

Emergency Contacts Details page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
First Name	EMERGENCY-CONTACT	16-SCR	All
Initial	EMERGENCY-CONTACT	16-SCR	All
Last Name	EMERGENCY-CONTACT	16-SCR	All
Telephone	EMERGENCY-AREA-CODE EMERGENCY-PHONE-NBR	16-SCR	All
Street Address	CONTACT-ADDRESS-1	16-SCR	All
City	CONTACT-CITY-STATE	16-SCR	US
State	CONTACT-CITY-STATE	16-SCR	US
ZIP Code	CONTACT-ZIP-CODE	16-SCR	US
City	CONTACT-CITY-PROV	16-SCR	Canada
Province	CONTACT-CITY-PROV	16-SCR	Canada
Postal Code	CONTACT-POSTAL-CODE	16-SCR	Canada

Emergency Doctor page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
First Name	EMERGENCY-PHYSICIAN	16-SCR	All
Initial	EMERGENCY-PHYSICIAN	16-SCR	All
Last Name	EMERGENCY-PHYSICIAN	16-SCR	All
Telephone	PHYSICIAN-AREA-CODE PHYSICIAN-PHONE-NBR	16-SCR	All
Street Address	PHYSICIAN-ADDRESS-1	16-SCR	All
City	PHYSICIAN-CITY-ST	16-SCR	US
State	PHYSICIAN-CITY-ST	16-SCR	US
City	PHYSICIAN-CITY-PROV	16-SCR	Canada
Province	PHYSICIAN-CITY-PROV	16-SCR	Canada
ZIP Code	PHYSICIAN-ZIP-CODE	16-SCR	US
Postal Code	PHYSICIAN-POSTAL-CDE	16-SCR	Canada

Other Personal Details page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Do you smoke?	SMOKER-ID	15-SCR	All

HR Field Information

The dependent numbering data entered by the HR administrator in Interactive Workforce is stored in the Interactive Workforce database. The table that follows provides information about the fields on the Dependent Numbering page in *Interactive Workforce*. The information is entered by organization (Control 1-2s).

Dependent Numbering page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Organization Number	CONTROL 1-2	ORGInteractive Workforce	All
Organization Name	COMPANY NAME	ORGInteractive Workforce	All
Spouse: Starting Value	N/A-*Interactive Workforce* specific field	N/A	All
Spouse: Increment	N/A-*Interactive Workforce* specific field	N/A	All
All Other Dependents: Starting Value	N/A-*Interactive Workforce* specific field	N/A	All
All Other Dependents: Increment	N/A-*Interactive Workforce* specific field	N/A	All

Benefits Field Information

Verify organizations and flex master plans

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Number and Effective Date (for current year flex master plan)	MASTER-PLAN-ID, MASTER-PLAN-DATE	TP-ESS	All
Number and Effective Date (for next year flex master plan)	MASTER-PLAN-ID, MASTER-PLAN-DATE	TP-ESS	All

Current and Next Year's Benefit Enrollments

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Your total cost per pay period	ESS-PRE-TAX-PER-COST or ESS-PST-TAX-PER-COST	AP-ESS	All
Your total cost per year	ESS-PRE-TAX-ANN-COST Plus ESS-PST-TAX-ANN-COST	AP-ESS	All
Plan Name	ESS Plan Name	ESS database	All
Effective	ESS-PLAN-EFF-DATE	AP-ESS	All
Option Elected	ESS-OPTION-ELECTED	AP-ESS	All
Insured Dependents Display only if plan option requires dependents	OTHER-NAME	59DSCR	All
Cost	ESS-PRE-TAX-PER-COST Or ESS-PST-TAX—PER COST	AP-ESS	All
Coverage Amount	ESS-COVERAGE-AMT	AP-ESS	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Beneficiaries Display only if plan option requires dependents	BENEFICIARY-NAME	59BSCR	All
Contribution Replace cost with contribution if this is a flexible spending account	ESS-PRE-TAX-PER-COST Or ESS-PST-TAX—PER COST	AP-ESS	All
Pre-tax indicator Display if deduction amounts are pre-tax	ESS-PRE-TAX-FLAG	AP-ESS	All
Total Cost Allocations: Flex Credits Awarded Per Pay Period	ESS-FLEX-CREDITS	AP-ESS	All
Total Cost Allocations: Flex Credits Awarded Per Year	ESS-FLEX-CREDITS	AP-ESS	All
Your total cost: per pay period	ESS-CREDITS-APPLIED	AP-ESS	All
Your total cost per year	ESS-CREDITS-APPLIED	AP-ESS	All
Difference Per Pay Period	ESS-FLEX-CREDITS Less ESS--CREDITS-APPLIED	AP-ESS	All
Difference Per Year	ESS-FLEX--CREDITS less ESS--CREDITS-APPLIED	AP-ESS	All
Added to Your Pay: Per pay period (Display 'Added to Your Pay' only if the value of FLEX-CREDITS-TO-CASH is greater than 0.)	FLEX-CREDITS-TO-CASH	55CSCR	All
Added to Your Pay: Per Year (Display 'Added to Your Pay' only if FLEX-CREDITS-TO-CASH is greater than 0.)	FLEX-CREDITS-TO-CASH	55CSCR	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Deducted from Your Pay: Per Pay Period (Display 'Deducted from Your Pay' only if FLEX-CR-DEDUCTION is greater than 0.)	FLEX-CR-DEDUCTION	55CSCR	All
Deducted from Your Pay: Per Year (Display 'Deducted from Your Pay' only if FLEX-CR-DEDUCTION is greater than 0.)	FLEX-CR-DEDUCTION	55CSCR	All
Total Cost Allocations: Flex Credits Awarded Per Pay Period	ESS-FLEX-CREDITS	AP-ESS	All
Flex Credits Awarded: Per Year	ESS-FLEX-CREDITS	AP-ESS	All
Your total cost: Per Pay Period	ESS-FLEX-CREDITS	AP-ESS	All
Your total cost: Per Year	ESS-FLEX-CREDITS	AP-ESS	All

Beneficiaries

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Name	BENEFICIARY-NAME	58-SCR	All
Relationship	BENEF-RELATION-CODE	58-SCR	All

Beneficiary Details

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
First Name Last Name	BENEFICIARY-NAME	58-SCR	All
Social Security Number	BENEF-SOC-SSN-1-3 BENEF-SOC-SSN-5-6 BENEF-SOC-SSN-8-11	58-SCR	US
Social Insurance Number	OTHER-SIN-1-3 OTHER-SIN-5-7 OTHER-SIN-9-11	58-SCR	Canada
Relationship	BENEF-RELATION-CODE	58-SCR	All
Birth Date	BENEF-BIRTH-DATE	58-SCR	All
Gender	BENEF-SEX-CODE	58-SCR	All
Telephone	BENEF-AREA-CODE and BENEF-PHONE-NUMBER	58-SCR	All
Street Address	BENEF-ADDRESS BENEF-ADDRESS-2	58-SCR	All
City State	BENEF-CITY/STATE	58-SCR	US
ZIP Code	BENEF-ZIP-CODE	58-SCR	US
City Province	BENEF-CITY/PROV	58-SCR	Canada
Postal Code	BENEF-POSTAL-CODE	58-SCR	Canada

Institutional Beneficiaries

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Name	BENEFICIARY-NAME	58-SCR	All
Tax Identity Number	BENEF-SOC-SECURITY	58-SCR	All
Type	BENEF-RELATION-CODE	58-SCR	All
Telephone	BENEF-AREA-CODE and BENEF-PHONE-NUMBER	58-SCR	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Street Address	BENEF-ADDRESS BENEF-ADDRESS-2	58-SCR	All
City State	BENEF-CITY/STATE	58-SCR	US
ZIP Code	BENEF-ZIP-CODE	58-SCR	US
City Province	BENEF-CITY/PROV	58-SCR	Canada
Postal Code	BENEF-POSTAL-CODE	58-SCR	Canada

Change Beneficiaries and Allocations

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Plan	Plan identifier = BENEFICIARY-PLAN-ID (plan name will come from the plan specific options table in Benefits Admin)	59BSCR	All
Coverage	ESS-COVERAGE-AMT	AP-ESS	All
Select Beneficiaries	BENEFICIARY-NAME	58-SCR	All
Allocate Benefit	PERCENT-ALLOCATED-1 through PERCENT- ALLOCATED-8	59BSCR	All
Allocation Total	Total of PERCENT-ALLOCATED-1 through PERCENT-ALLOCATED-8		All

Flexible Spending Account Balances

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Plan Year	FSA-FLEX-YEAR	57-SCR	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Balance As of _____	FSA-BALANCE-DATE	57-SCR	All
Plan Name	FSA-PLAN-ID	57-SCR	All
Annual Contribution	FSA-TOTAL-CREDITS	57-SCR	All
Balance	FSA-BALANCE	57-SCR	All

Benefits Enrollment Field Information

Benefits Eligibility

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Plan	ESS-PLAN-ID	AP-ESS	All
Coverage Option	ESS-OPTION-ELECTED (built from The Solution Series option list BA03)	55-SCR	All
Cost Per Pay Period	ESS-PST-TAX-PER-COST Or ESS-PRE-TAX-PER-COST	AP-ESS	All
You have been awarded $____ in flexible benefits credits	ESS-FLEX-CREDITS	AP-ESS	All

Benefits Enrollment Summary

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Option Elected	ESS-OPTION-ELECTED (built from The Solution Series option list BA03)	55-SCR	All
Effective	ESS-PLAN-EFF-DATE	AP-ESS	All
Cost or Contribution Per Pay Period	ESS-PRE-TAX PER COST Or ESS-PST-TAX-PER COST	AP-ESS	All
Cost or Contribution Per Year	ESS-PRE-TAX-ANN-COST or ESS-PST-TAX-ANN-COST	AP-ESS	All
Total Costs Per Pay Period	ESS-PRE-TAX-PER-COST Or ESS-PST-TAX-PER COST	System Calculated	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Total Costs Per Year	ESS-PRE-TAX-ANN-COST or ESS-PST-TAX-ANN-COST	System Calculated	All
Total Flex Credits Awarded Per Pay Period	ESS-FLEX-CREDITS	AP-ESS	All
Total Flex Credits Awarded Per Year	ESS-FLEX-CREDITS	AP-ESS	All
Spent – Per Pay Period	ESS-PRE-TAX-PER COST Or ESS-PST-TAX-PER-COST	AP-ESS	All
Spent – Per Year	ESS-PRE-TAX-ANN-COST Or ESS-PST-TAX-ANN-COST	AP-ESS	All
Balance – Per Pay Period	Not Applicable to The Solution Series	System-calculated amount	All
Balance – Per Year	Not Applicable to The Solution Series	System-calculated amount	All
Company specific line details where flex balance goes	Not Applicable to The Solution Series	Benefits Admin	All

Step 1: Choose a Plan

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Plan Name	ESS-PLAN-ID	AP-ESS	All
Option	ESS-OPTION-ELECTED	AP-ESS	All
Cost or Contribution Per Pay Period	ESS-PRE-TAX PER COST Or ESS-PST-TAX-PER COST	AP-ESS	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Cost Per Year	ESS-PRE-T AX-ANN-COST Or ESS-PST-TAX-ANN-COST	AP-ESS	All
Coverage	ESS-COVERAGE-AMT	AP-ESS	All
Variable amount entry field	FX-VARIABLE-FACTOR	The value entered will be submitted to The Solution Series via AP-ESS	All

Select Deduction Method

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Pre-Tax	ESS-PRE-TAX FLAG	AP-ESS or field will be populated based on the User's earlier choice	All
Post-Tax	ESS-PST-TAX-FLAG	AP-ESS or field will be populated based on the User's earlier choice	All

Select Family Members to Cover

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Family Members	OTHER-KEY	10-SCR	All
Family Member Name	OTHER-NAME	10-SCR	All
Relationship	RELATIONSHIP-CODE (built from option list HR28)	10-SCR	All

Select Beneficiaries and Allocations

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Plan	Plan identifier = BENEFICIARY-PLAN-ID (plan name will come from the plan specific options table in Benefits Admin)	59BSCR	All
Coverage	ESS-COVERAGE-AMT	AP-ESS	All
Select Beneficiaries	BENEFICIARY-NAME	58-SCR	All
Allocate Benefits	PERCENT-ALLOCATED-1	59BSCR	All
Allocation Total	Total of PERCENT-ALLOCATED-1 through PERCENT-ALLOCATED-8		All

Confirm Enrollment

Interactive Workforce Field Label	**The Solution Series Field Name**	**The Solution Series Form**	**Countr y**
Plan	ESS Plan Name	TM-SCR Note: the Benefits admin has the ability to rename the plan. The name is then stored in the Interactive Workforced atabase	All
Effective	ESS-PLAN-EFF-DATE	AP-ESS	All
Option Elected	ESS-OPTION-ELECTED	AP-ESS or field will be populated based on the User's earlier choices	All
Coverage Amount	ESS-COVERAGE-AMT	AP-ESS or field will be populated based on the user's earlier choices	All
Insured Dependents	OTHER-NAME	AP-ESS or field will be populated based on the User's earlier entries	All
Beneficiaries	BENEFICIARY-NAME	59BSCR	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Cost Per Pay Period	ESS-PST-TAX-PER-COST Or ESS-PRE-TAX-PER-COST	AP-ESS or field will be populated based on the User's earlier choices	All
Company Contribution	ESS-COM-PER-PAY-COST	AP-ESS	All

The field information tables for the other Interactive Workforce pages that users may access while enrolling in benefits are:

- Other Personal Details
- Beneficiary Details
- Institutional Beneficiaries
- Family Member Details

New User Process Field Information

New User Marital Status page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Married, Single, Divorced, or any custom options set by your organization	MARITAL-CODE	02-SCR	All

Payroll Field Information

Direct Deposit (primary account only) summary page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Remaining Net Pay HED displays (field not labeled on summary page)	See data fields in Employee-Bank-number; Bank-Account and Account-Type for details	H9-SCR (HED used for Remaining Net Pay)	All
Bank name and routing number	EMPLOYEE-BANK-NUMBER	H9-SCR (HED used for Remaining Net Pay)	All
Account Number	BANK-ACCOUNT	H9-SCR (HED used for Remaining Net Pay)	All
Account Type	ACCOUNT TYPE	H9-SCR (HED used for Remaining Net Pay)	All

Primary Account Details page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Remaining Net Pay HED used by the enterprise displays (field not labeled on summary page)	See data fields in Employee-Bank-number; Bank-Account and Account-Type for details	H9-SCR (HED used for Remaining Net Pay)	All

Interactive Workforce Field Label	**The Solution Series Field Name**	**The Solution Series Form**	**Countr y**
Bank name and routing number (Drop down list built from *The Solution Series* option list PR07)	See data fields in Employee-Bank-number; Bank-Account and Account-Type for details	H9-SCR (HED used for Remaining Net Pay)	All
Account Number	BANK-ACCOUNT	H9-SCR (HED used for Remaining Net Pay)	All
Account Types (Drop down list built from The Solution Series option list PR06)	BANK-ACCOUNT-TYPE	H9-SCR (HED used for Remaining Net Pay)	All

Direct Deposit (Additional Accounts) summary page

Interactive Workforce Field Label	**The Solution Series Field Name**	**The Solution Series Form**	**Countr y**
Remaining Net Pay HED as well as other HEDs set up for additional accounts display (fields not labeled on summary page)	See data fields in Employee-Bank-number; Bank-Account and Account-Type for details	H9-SCR (HEDs used for Remaining Net Pay and additional accounts)	All
Bank name and routing number display	EMPLOYEE-BANK-NUMBER	H9-SCR (HED used for Remaining Net Pay)	All
Account Number	BANK-ACCOUNT	H9-SCR (HED used for Remaining Net Pay)	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Active (check mark)	DIRECT-DEPOSIT-CODE	H9-SCR (HEDs used for additional direct depositable accounts)	All
Additional Account 'n'	HED name, as edited in Interactive WorkforcePayroll Admin	N/A	All
Bank name and routing number display	EMPLOYEE-BANK NUMBER	H9-SCR (HEDs used for additional direct depositable accounts)	All
Account Number	BANK-ACCOUNT	H9-SCR (HEDs used for additional direct depositable accounts)	All
Account Type	ACCOUNT TYPE	H9-SCR (HEDs used for additional direct depositable accounts)	All
Deposit	AMOUNT-PERCENT	H9-SCR (HEDs used for additional direct depositable accounts)	All

Additional Accounts Details page

Interactive Workforce Field Label	**The Solution Series Field Name**	**The Solution Series Form**	**Countr y**
Additional Account 'n' No label: information showing on this summary page represents the secondary account. This page contains data for every additional account set up by the user.	See data fields in Employee-Bank-number; Bank-Account and Account-Type for details	H9-SCR (HEDs used for additional direct depositable accounts)	All
Bank name and routing number (Drop down list built from the The Solution Series option list PR07)	EMPLOYEE-BANK-NUMBER	H9-SCR (HEDs used for additional direct depositable accounts)	All
Account Number	BANK-ACCOUNT	H9-SCR (HEDs used for additional direct depositable accounts)	All
Account Type (Drop down list built from the The Solution Series option list PR06)	BANK-ACCOUNT-TYPE	H9-SCR (HEDs used for additional direct depositable accounts)	All
Deposit Amount	AMOUNT-PERCENT	H9-SCR (HEDs used for additional direct depositable accounts)	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Dollars ($) and Percent (%) of Remaining Net Pay	AMOUNT-PERCENT	H9-SCR (Only HEDs for additional direct depositable accounts)	All
Account active button	DIRECT-DEPOSIT-CODE	H9-SCR (Only HEDs for additional direct depositable accounts)	All

Reimbursement Account - summary page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Payment by Check (radio button) NOTE: This radio button displays only if the Payroll Admin pages have been set up to allow manual checks	DIRECT-DEPOSIT-CODE	H9-SCR (Used only when HED 999 has been customized to be used as a reimbursement account)	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Other account information (radio button) A radio button with account information appears for every active direct deposit account the employee user set up	See data fields in Employee-Bank-number; Bank-Account and Account-Type for the appropriate HED for details	H9-SCR (Used only when HED 999 has been customized to be used as a reimbursement account)	All

Reimbursement Account Details page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Bank name and routing number (Drop down list built from The Solution Series option list PR07)	EMPLOYEE-BANK-NUMBER	H9-SCR (Used only when HED 999 has been customized to be used as a reimbursement account)	All
Account Number	BANK-ACCOUNT	H9-SCR (Used only when HED 999 has been customized to be used as a reimbursement account)	All

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Countr y
Account Type (Drop down list built from the The Solution Series option list PR06)	BANK-ACCOUNT-TYPE	H9-SCR (Used only when HED 999 has been customized to be used as a reimburse-ment account)	All

Set Up Direct Deposit HEDs page

Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Organization Number	CONTROL 1-2	ORGESS	All
Organization Name	COMPANY-NAME	ORGESS	All
HED Number	COMPANY-HED-NUMBER	A8-ESS	All
HED Name	HED_NAME	A8-ESS (Payroll admin can rename)	All
Remaining Net Pay Account	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Expense Reimbursement Account	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Supplemental Direct Deposit Accounts	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Do you want employees in this organization to have the option of receiving a check?	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All

Special processing considerations

The Direct Deposit or Reimbursement Account selections that the user makes determine what information Interactive Workforce sends to The Solution Series. The table that follows lists all The Solution Series fields that may be updated as a result of the user's selections. Different processing selections require that different 'behind the scenes' commands be sent to The Solution Series.

Key: blank = no information needs to be sent to The Solution Series
N/A = this option not allowed
= send the String '#' to The Solution Series for this field

Direct Deposit - Remaining net pay = HED 999			
Payroll Administration field	**Active**	**Inactive**	**Delete**
HED-NUMBER	999	N/A	999
HED-DEDUCT-FREQ-CD	00	N/A	00
ARREARS	00	N/A	Blank
HED-DEDUCT-METHOD-CD	00	N/A	00
AMOUNT/PERCENT	blank	N/A	#
EMPLOYEE-BANK-NUMBER	PR07	N/A	#
EMPLOYEE-BANK-NAME	PR07	N/A	#
ACCOUNT-TYPE	PR06	N/A	#
ACCOUNT-NUMBER	varies	N/A	00000000000000000
DEPOSIT-STATUS	D	N/A	0
Secondary Accounts			
Payroll Administration field	**Active**	**Inactive**	**Delete**
HED-NUMBER	Varies	Varies	Varies
HED-DEDUCT-FREQ-CD	01	00	00
ARREARS	00	Blank	Blank
HED-DEDUCT-METHOD-CD	02/13	Blank	00
ARREARS	00	00	Blank
HED-DEDUCT-METHOD-CD	02/13	00	00
AMOUNT/PERCENT	Varies	Blank	#
EMPLOYEE-BANK-NUMBER	PR07	PR07	#
EMPLOYEE-BANK-NAME	PR07	PR07	#
ACCOUNT-TYPE	PR06	Blank	#
ACCOUNT-NUMBER	Varies	Blank	00000000000000000

Direct Deposit - Remaining net pay = HED 999			
DEPOSIT-STATUS	D	0	

Payroll Administration field	Active	Inactive	Delete
HED-NUMBER	998	N/A	998
HED-DEDUCT-FREQ-CD	01	N/A	Blank
ARREARS	00	N/A	Blank
HED-DEDUCT-METHOD-CD	13	N/A	Blank
AMOUNT/PERCENT	10000	N/A	#
EMPLOYEE-BANK-NUMBER	PR07	N/A	#
EMPLOYEE-BANK-NAME	PR07	N/A	#
ACCOUNT-TYPE	PR06	N/A	#
ACCOUNT-NUMBER	Varies	N/A	00000000000000000
DEPOSIT-STATUS	D	N/A	0

Pay Advice Current/history page

All the pay information that displays on the Pay Advice Current and History pages are stored in the Pay Information database. Therefore, the table with database information for this page shows the column name in the Interactive Workforce database where the information is stored. You may find the table that follows useful when troubleshooting any issues that occur.

The Pay Information Report Generators extract field information from The Solution Series and produce four text files in predefined formats. The Pay Information database load process transfers the data from the text files into the appropriate tables in the Pay Information database. An application program interface gets the information from the database and displays it to the employee on the pay information pages.

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Employee Number	Employee_Id	EMPLOYEE-NUMBER	EF-SCR, Record 001	All
Pay Date	Pay_Date	PAYMENT-DATE	AJ-SCR	All

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Employee Name (Name Prefix) (First name) (Middle name) (Last name) (Name suffix)	 Name_Prefix_Description First_Name Middle_Name Last_Name Name_Suffix_Description	 EMP-NAME-PREFIX EMP-FIRST-NAME EMP-LAST-NAME EMP-MIDDLE-NAME EMP-NAME-SUFIX	 EF-SCR EF-SCR EF-SCR EF-SCR EF-SCR	All
Social Security Number	SSN	SSN-1-3 SSN-5-6 SSN-8-11	EF-SCR	U.S.
Social Insurance Number	SSN	SSN-1-3 SSN-5-6 SSN-8-11	EF-SCR	Canada
Period Begin Date	Period_Start		AJ-SCR	All
Period End Date	Period_End	PERIOD-DATE	AJ-SCR	All
Pay Period Salary/Rate	Salary_Rate for rate Salary for salary (S)	HISTORY-SALARY = Salary HISTORY-RATE = Rate	HL-SCR	All
Check Number	Check_Number	RECON_NUMBER	HL-SCR	U.S.
Cheque Number	Check_Number	RECON_NUMBER	HL-SCR	Canada

For each Earning record on the database, the Pay Advice Current page displays the information for the appropriate HED:

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Actual Earnings Description	HED-Description	HED-NAME (W8-15-000—working storage field name)	HT-SCR	All
Earnings Current Hours/Units	Current_Units_Hours	HED-AMOUNT-CUR or HED-HOURS-CUR	HT-SCR	All
Earnings Year to Date Amount	Ytd_Amt	HED-AMOUNT-YTD	HT-SCR	All

For Total Pay the Pay Advice Current page displays the information for the HED:

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Current_Amt	HED-AMOUNT-CUR	HT-SCR	All
Year to Date Amount	Ytd_Amt	HED-AMOUNT-YTD	HT-SCR	All

For each Deduction record on the database, the Pay Advice Current page displays information for each appropriate HED:

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Actual Deduction Description	HED Description	HED-NAME (W8-15-000-working storage field name)	HT-SCR	All

For Net Pay, the Pay Advice Current page displays information for the appropriate HED

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Current_Amt	HED-AMOUNT-CUR	HT-SCR	All
Year to Date Amount	Ytd_Amt	HED-AMOUNT-YTD	HT-SCR	All

For Net Pay Arrears, the Pay Advice Current page displays information for the appropriate HED:

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Current_Amt	HED-AMOUNT-CUR	HT-SCR	All
Year to Date Amount	Ytd_Amt	HED-AMOUNT-YTD	HT-SCR	All

For all tax information (federal, state, and local), the Pay Advice Current page displays the current and year to date amounts using the tax ID information in the following two fields plus the appropriate federal, state, or local tax description (see the following tables for federal, state, and local Solution Series field and form names):

Interactive Workforce Page Label	Interactive Workforce Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Tax_Withheld_Current	*See logic in federal, state, and local sections that follow	JT-SCR	All
Year to Date Amount	Tax_Withheld_Ytd	*See logic in federal, state, and local sections that follow	JT-SCR	All

U.S. Tax Information

For each U. S. federal tax record on the database, the Interactive Employee Pay Advice Current page displays information for each appropriate U. S. federal tax:

Interactive Workforce Page Label – Federal Level Taxes	Interactive Workforce Field Name for Current Federal Tax	The Solution Series Field Name for Year to Date Federal Tax	The Solution Series Form	Country
ER OASDI Wages	FLD117-CUR	FLD117-YTD	JT-SCR	U.S.
EE OASDI Wages	FLD118-CUR	FLD118-YTD	JT-SCR	U.S.
Total Pay	FLD119-CUR	FLD119-YTD	JT-SCR	U.S.

Interactive Workforce Page Label – Federal Level Taxes	Interactive Workforce Field Name for Current Federal Tax	The Solution Series Field Name for Year to Date Federal Tax	The Solution Series Form	Country
ER OASDI Tax	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
EE OASDI Tax	FLD122-CUR	FLD122-YTD	JT-SCR	U.S.
ER HI Wages	FLD117-CUR	FLD117-YTD	JT-SCR	U.S.
EE HI Wages	FLD118-CUR	FLD118-YTD	JT-SCR	U.S.
ER HI Tax	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
EE HI Tax	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
Work Wages	FLD117-CUR	FLD117-YTD	JT-SCR	U.S.
Resident Wages	FLD118-CUR	FLD118-YTD	JT-SCR	U.S.
FIT Taxable Wages	FLD119-CUR	FLD119-YTD	JT-SCR	U.S.
FIT Withheld	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
FED UI Wages	FLD121-CUR	FLD121-YTD	JT-SCR	U.S.
Earn Income Credit	FLD122-CUR	FLD122-YTD	JT-SCR	U.S.
OT Premium	FLD123-CUR	FLD123-CUR	JT-SCR	U.S.
Weeks Worked	FLD124-CUR	FLD124-YTD	JT-SCR	U.S.

For each U. S. state tax record on the databse, the Pay Advice Current page displays information for each appropriate U. S. state tax:

Interactive Workforce Page Label - State Level Taxes	The Solution Series Field Name for Current State Tax	The Solution Series Field Name for Year to Date State Tax	The Solution Series Form	Country
Work Wages	FLD117-CUR	FLD117-CUR	JT-SCR	U.S.
Resident Wages	FLD118-CUR	FLD118-YTD	JT-SCR	U.S.
SIT Taxable Wages	FLD119-CUR	FLD119-YTD	JT-SCR	U.S.
SIT Withheld	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
State UI Wages	FLD121-CUR	FLD121-YTD	JT-SCR	U.S.
EE Paid UI	FLD122-CUR	FLD122-YTD	JT-SCR	U.S.
OT Premium	FLD123-CUR	FLD123-CUR	JT-SCR	U.S.
Weeks Worked	FLD124-CUR	FLD124-YTD	JT-SCR	U.S.
State Withheld	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
Disability Wages	FLD121-CUR	FLD121-YTD	JT-SCR	U.S.
Disability Tax	FLD122-CUR	FLD122-YTD	JT-SCR	U.S.

For each U. S. local tax record on the database, the Pay Advice Current page displays information for each appropriate U. S. local tax:

The Solution Series Page Label - Local Level Taxes	The Solution Series Field Name for Current Local Tax	The Solution Series Field Name for Year to Date Local Tax	The Solution Series Form	Country
Work Wages	FLD117-CUR	FLD117-CUR	JT-SCR	U.S.
Resident Wages	FLD118-CUR	FLD118-YTD	JT-SCR	U.S.
Loc Taxable Wages	FLD119-CUR	FLD119-YTD	JT-SCR	U.S.
Local Withheld	FLD120-CUR	FLD120-YTD	JT-SCR	U.S.
OT Premium	FLD123-CUR	FLD123-YTD	JT-SCR	U.S.
Weeks Worked	FLD124-CUR	FLD124-YTD	JT-SCR	U.S.

For each Additional Tax, the Interactive WorkforcePay Advice Current page displays the current and year to date amounts using the tax ID information in the following two fields plus the tax information using the federal, state, and/or local information in the preceding three tables:

The Solution Series Page Label	The Solution Series Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Other_Tax_Withheld_Curr ent	*See above tables for taxes	JT-SCR	U.S.
Year to Date Amount	Other_Tax_Withheld_Ytd	*See above tables for taxes	JT-SCR	U.S.

For each Combo HED record on the Interactive Workforce database, the Pay Advice Current page displays the appropriate HED category:

Actual HED Description	HED_Description	HED-NAME (W8-15-000—working storage field name)	HT-SCR	U.S.
Current Amount	Current_Amt	HED-AMOUNT-CUR	HT-SCR	U.S.
Year to Date Amount	Ytd_Amt	HED-AMOUNT-YTD	HT-SCR	U.S.

Canadian Tax Information

In Canada, there can be between 0 and 4 lines of taxes on a cheque. Typically, an employee will have 3 lines (or 4 if they are in the province of Quebec). Each line prints only if there is a non-zero value for the Current Amount or for the Year-To-Date Amount. The tax information lines print in the following order on the Interactive Workforce Pay Advice Current page:

Line 1 – Federal Tax Withheld

Line 2 – Provincial Tax Withheld

Line 3 – Q/CPP Premiums

Line 4 – EI Premiums

For the Federal Tax Withheld and Provincial Tax Withheld information, the Pay Advice Current page displays the current and year to date amounts using the tax ID information in the following two fields plus the appropriate tax description (see the following tables for Federal Tax Withheld and Provincial Tax Withheld The Solution Series field and form names):

The Solution Series Page Label	The Solution Series Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Tax_Withheld_Current	*See logic in Federal Tax Withheld and Provincial Tax Withheld sections that follow	JT-SCR	Canada
Year to Date Amount	Tax_Withheld_Ytd	*See logic in Federal Tax Withheld and Provincial Tax Withheld sections that follow	JT-SCR	Canada

For the Q/CPP Premiums and EI Premiums information, the Interactive WorkforcePay Advice Current page displays the current and year to date amounts using the tax ID information in the following two fields plus the appropriate tax description (see the following tables for Q/CPP Premiums and EI Premiums The Solution Series field and form names):

The Solution Series Page Label	The Solution Series Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Current Amount	Other_Tax_Withheld_Curr ent	*See logic in Q/CPP Premiums and EI Premiums sections that follow	JT-SCR	Canada
Year to Date Amount	Other_Tax_Withheld_Ytd	*See logic in Q/CPP Premiums and EI Premiums sections that follow	JT-SCR	Canada

For the Federal Tax Withheld, the Current Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Tax_Withheld_Current' for all the tax records where the 'Tax_Id' field begins with the literal '2'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

For the Federal Tax Withheld, the Year To Date Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Tax_Withheld_Ytd' for all the tax records where the 'Tax_Id' field begins with the literal '2'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

The Solution Series Page Label	The Solution Series Database Column Name	The Solution Series Field Name	The Solution Series Form	Country
Federal Tax	FLD120-CUR	FLD120-YTD	JT-SCR	Canada

For the Provincial Tax Withheld, the Current Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Tax_Withheld_Current' for all the tax records where the 'Tax_Id' field begins with the literal '3PQ' or '3QC'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

For the Provincial Tax Withheld, the Year To Date Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Tax_Withheld_Ytd' for all the tax records where the 'Tax_Id' field begins with the literal '3PQ' or '3QC'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

The Solution Series Page Label – Provincial Tax Withheld	The Solution Series Field Name for Current Provincial Tax Withheld	The Solution Series Field Name for Year to Date Provincial Tax Withheld	The Solution Series Form	Country
Provincial Tax	FLD120-CUR	FLD120-YTD	JT-SCR	Canada

For the Q/CPP Premiums, the Current Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Other_Tax_Withheld_Current' for all the tax records where the 'Tax_Id' field begins with the literal '2'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

For the Q/CPP Premiums, the Year To Date Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Other_Tax_Withheld_Ytd' for all the tax records where the 'Tax_Id' field begins with the literal '2'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

Interactive Workforce Page Label – Q/CPP Premiums	The Solution Series Field Name for Current Q/CPP Premiums	The Solution Series Field Name for Year to Date Q/CPP Premiums	The Solution Series Form	Country
CPP/QPP	FLD122-CUR	FLD122-YTD	JT-SCR	Canada

For the EI Premiums, the Current Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Other_Tax_Withheld_Current' for all the tax records where the 'Tax_Id' field begins with the literal '3'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

For the EI Premiums, the Year To Date Amount displayed on the Interactive WorkforcePay Advice Current page contains the sum of 'Other_Tax_Withheld_Ytd' for all the tax records where the 'Tax_Id' field begins with the literal '3'. Please note that there may be no tax records which meet this selection criteria and there may be multiple tax records which meet this selection criteria.

Interactive Workforce Page Label – EI Premiums	The Solution Series Field Name for Current EI Premiums	The Solution Series Field Name for Year to Date EI Premiums	The Solution Series Form	Country
Employment Insurance	FLD122-CUR	FLD122-YTD	JT-SCR	Canada

APPENDIX B

Error Messages

In This Appendix

About this appendix

This appendix provides tables showing the error messages sent to users when Interactive Workforce validates the information in a field or on a page.

Introduction to Error Messages

Interactive Workforce sends error messages to users as the system validates the information users enter. Validation errors may occur at the field level or at the page level.

Field validation

As users enter information into fields on Interactive Workforce pages, the system validates the input data against the data the system expected to receive. If the validation fails, the system displays a dialog box with an error message. When the user closes the dialog box, the cursor is positioned in the field where the error occurred. Users must correct the data before they can proceed.

Page validation

The next level of validation occurs when the user clicks Save Changes. The system then validates information on the page and sends an error message to the user if the validation fails. If several required fields are missing, the error message will notify the user of all the fields that are missing. After the user closes the dialog box, the cursor is positioned on the first field that needs data. Again, users must take action before they can proceed.

Interactive Workforce error messages

The tables that follow are organized by the user who sees the error message. General user error messages display to employee users. All the remaining tables contain error messages that display to administrator users. Following is a list of the tables contained in this appendix.

- General user error messages
- HR administration error messages
- Payroll administration error messages
- Benefits administration error messages

The first column of the table shows the text of the message the employee or administrator user sees. The second column shows the cause of the error and implies the action the user must take to proceed.

General user error messages

The following error messages display, when appropriate, on the pages used by employee users.

Error Message	Cause Of Error
The following field(s) require data: Field1 Field2	This error occurs when required fields on the page are missing. The validation occurs when the user selects save changes.
This field accepts numeric values only.	This error occurs when alpha character(s) are used in a numeric only field.
This field accepts alphabetic characters and appropriate punctuation.	This error occurs when a numeric value is used in an alpha only field.
This field must contain alphabetic and numeric values only.	This error occurs when a value other then alpha or numeric is used in a field identified as alphanumeric.
The number of characters required in this field is:	This error occurs when a field requires a certain number of characters and the user did not enter the required number.
The following field must have a value greater than 0.	This error occurs when a field requires a numerical entry and the value must be greater than 0 (zero).
A complete address is required. Note: Please check to be sure you entered a complete address including a Street Address, City, State and ZIP Code.	This error occurs when a complete address is not entered. (US version only)

Error Message	Cause Of Error
A bank must be selected before continuing. If your bank is not on the drop down list, please exit this process and notify the payroll department.	This error occurs when the user fails to select a bank during the direct deposit or reimbursement account processes. The payroll department must include the bank information (name and routing number) in the drop-down list of banks used on the Direct Deposit pages.
The maximum number of characters allowed in all name fields combined is:	This error occurs when the name (first, middle initial and last combined) exceeds the total number of characters allowed.
This field accepts only alphabetic and numeric characters and hyphens.	This error occurs when the user enters anything other than alphanumeric characters on the account number field for Reimbursement and Direct Deposit account pages.
A complete phone number is required. Note: Please check to be sure you entered the area code and a complete phone number.	This error occurs when a complete phone number is not entered.
A complete address is required. Note: Please check to be sure you entered a complete address including a Street Address, City, Province and Postal Code.	This error occurs when a complete address is not entered. (Canadian Version only)
A work extension is entered with no corresponding work number. Please enter the work phone number along with the extension.	This error occurs when a work extension is entered with no corresponding work number.
Please verify that your Bank Name and Routing Number are correct before continuing.	This is a warning message asking the user to confirm that they have selected the correct direct deposit information.
There is a conflict between the gender and relationship. For example, if you chose son as the relationship, please be sure you checked male as the gender.	This error occurs when there is a conflict in the gender/relationship combination used.
A future date is not allowed.	This error occurs when a user enters a future date in a date field that does not allow a future date.
Percent cannot be greater than 100.	This error occurs when the user selects a percentage option on the direct deposit setup but the value in the dollar/percent field is greater then 100%.
The first field in the postal code must have an alphabetic character, a number, and an alphabetic character	The first three bytes of the Canadian postal code must be in the format X9X (alphabetic-numeric-alphabetic).

Error Message	**Cause Of Error**
The second field in the postal code must have a number, an alphabetic character, and a number	The last three bytes of the Canadian postal code must be in the format 9X9 (numeric-alphabetic-numeric)
The minimum number of characters required in this field is:	This error occurs when a user enters fewer than the minimum number of characters required.
This field accepts numbers and dashes only.	This error occurs when the user enters characters or spaces in the Tax ID Number field.
The date you entered is not valid	This error occurs if the user does not enter a four--digit year in the year field, or if any of the characters entered are not numbers. It can also occur when the year entered by the user is prior to 1800 or greater than 2099.
Your session has expired and is no longer available. Please log on again.	This error occurs when the user lets the browser sit idle for an extended period of time without any activity.
Deposit amount cannot be less than 0.	This error occurs if the user tries to save a negative Deposit Amount in a Direct Deposit Secondary Account.
The existing password cannot be blank. Please enter your password.	This error occurs when the existing password is blank.
You must either enroll in a plan or indicate that you do not wish to participate in a plan.	This error occurs when the user is enrolling in benefits and has selected Save Changes without enrolling or declining to participate in a benefits plan.
The new password cannot be blank. Please enter a valid password.	This error occurs when the new password is blank.
The new password must be re-entered to confirm. Please re-enter the new password.	This error occurs when the new password is entered and the re-entered password is blank.
The amount you entered exceeds the maximum amount allowed. The maximum amount allowed is:	The user has entered a variable amount that exceeds the maximum coverage or contribution amount specified in Benefits Administration.
The enrollment option you elected requires you to designate at least one family member as an insured dependent.	This error occurs if the user fails to select at least one family member on the 'Select Family Members to Cover' page.
You must enter a valid amount to enroll in this plan. To review plan entry instructions, click 'Instructions for this plan'. If you don't want to enroll, choose 'I do not wish to participate in a plan.'	This error occurs under the following conditions: The user is on the Enroll in Benefits page that is designed for plans that require the entry of a variable amount or number AND the user selects 'OK' without entering the variable amount or declining participation.

Error Message	Cause Of Error
Total percentage must equal 100. Please verify the percentages you entered.	This error occurs when the total percentage of the beneficiary allocations does not equal 100 percent.
Beneficiary percentage is missing. Please enter a percent.	This error occurs when a beneficiary has been selected but there is not a percentage allocated to the beneficiary.
The numeric value you entered exceeds the maximum allowed for this plan. To review plan entry instructions, click 'Important information you must review before you complete this page.'	This error occurs under the following conditions: The user is on the Enroll in Benefits page designed for plans that require the entry of a variable amount or number AND the number entered exceeds the maximum allowed.
At least one beneficiary is required for this benefit plan.	User tries to leave the 'Select Beneficiaries and Allocations' page without selecting at least one beneficiary.
InitialAdm cannot be accessed, deleted, or modified.	This error occurs when an administrator performs a search for InitialAdm in order to change the account settings.
Cannot specify allocation without selecting beneficiary	This error occurs when the user specifies an allocation but does not select a beneficiary.
Steps 1, 2, and 3 must be completed before enrolling in benefits.	This error occurs when the user tries to enroll in benefits before completing other sections necessary for proper enrollment. (Day one process)
The initial password must be at least 4 characters and no longer than 20.	The initial administrator or the Interactive Workforce administrator tried to create a password for an administrator that was less than 4 or greater than 20 characters.
Check with your benefits administrator for information about how your flexible benefits credits are calculated and applied.	The I-link file for the link "Show me how my flexible benefits are calculated and applied" is not available for the Confirm Cost page or the Benefits Eligibility page for customers who calculate credits during enrollment and for customers that allocate and deduct credits on a per plan basis.
Check with your benefits administrator because there may be additional information that you need before you enroll in this plan.	The I-link file for the link "Important information you MUST review before you complete this page" is not available for the Enroll in Benefits--Flexible Spending Account page.

Error Message	Cause Of Error
You have declined participation in this plan but entered a contribution or coverage amount. Please remove the amount or enroll in the plan.	This error occurs when: the user is on the Enroll in Benefits page that is designed for plans that require the entry of a variable amount or number AND the user selects "OK" and has entered an amount for a plan for which the 'enroll' option is not selected.
Time Away Request cannot be created for a date more than one year in the past from the current date.	This error occurs when an employee tries to enter a time away request for a date that is more than one year from the current date. Interactive Manager must be installed to access the Time Away Request feature.
The date you entered is not a valid format. Use the following format:	This error occurs when a user enters a date in a format that is not acceptable for the field. The error messages provides the correct format, for example, DD MM YYYY.

HR administration error messages

The following error message displays, when appropriate, on pages used by an administrator logging on as the HR administrator.

Error Message	Cause Of Error
Either the starting value or incrementing value is missing.	This message occurs when the user enters a staring value for dependent numbering but fails to enter an incrementing value.

Payroll administration error messages

The following error messages display, when appropriate, on pages used by an administrator logging on as the payroll administrator.

Error Message	Cause Of Error
HED 999 must be designated as a Remaining Net Pay account.	This error occurs when the administrator tries to exit the 'Set Up Direct Deposit HED's' page within Payroll Admin for a company with only HED 999 active and does not designate a Remaining Net Pay account.

Error Message	Cause Of Error
The following conditions must be met: **1.** HED 999 must be designated as Remaining Net Pay OR Expense Reimbursement (not both). **2.** HED 998 must be designated as Remaining Net Pay OR as a Supplemental account (not both). **3.** Exactly one of HED 999 and HED 998 must be a Remaining Net Pay account. **4.** If HED 998 is Remaining Net Pay, HED 999 must be an Expense Reimbursement account.	This error occurs when the administrator tries to exit the 'Set Up Direct Deposit HED's' page within Payroll Admin for a company with multiple HED's and hasn't designated the right choices for multiple HED's.

Benefits administration error messages

The following error messages display, when appropriate, on pages used by an administrator logging on as the benefits administrator.

Error Message	Cause Of Error
The group or subgroup name cannot be blank when performing this function.	This error occurs when the group or subgroup name is blank and the user selects either 'Save Changes' or 'Delete.'
This group cannot be deleted until all subgroups that belong to it are reassigned or deleted.	This error occurs when the user tries to delete a group that has subgroups assigned.
A group by this name already exists. No two groups can have the same name.	This error occurs when the user tries to name or rename a group using an existing group name.
A subgroup by this name already exists. No two subgroups can have the same name.	This error occurs when the user tries to name or rename a subgroup using an existing subgroup name.
The open enrollment ending date cannot be equal to or less then the beginning date.	This error occurs when the open enrollment ending date is equal to or less then the open enrollment beginning date.
The starting value or increment is missing	This error occurs when the starting or increment is missing from the beneficiary number process.
All subgroups must be assigned to a group other than the unassigned group.	This message occurs because the 'unassigned' group is not a valid choice.

Error Message	Cause Of Error
If you choose to delete this subgroup, any plans attached to it will no longer be in a valid subgroup. Please refer to the 'Maintain Benefit Plan Information' page to reassign the plan(s) to a valid subgroup.	This error occurs when the administrator tries to delete a subgroup that has Benefit plans attached to it. This is only a warning and can be overridden.
You already have this Plan Name within this organization's Flex Master.	This error occurs when the administrator tries to give a Benefit Plan the same name as an existing plan name within an organization's Flex Master.
The maximum number of characters allowed for this field is 320. Please modify your message.	This error occurs when the administrator tries to type in more than 320 characters in the message box on the Maintaining Flex Master Plan Information page.
The open enrollment beginning date cannot be equal to or greater than the open enrollment end date.	This error occurs when an administrator tries to enter a beginning date for open enrollment begin that is greater than or equal to the enrollment end date.
Please assign a valid subgroup to this benefit plan before exiting this page.	This error occurs when the Administrator tries to exit the 'Maintain Benefit Plan Information - Step 3 of 3' page without assigning the plan to a valid subgroup.
All display order boxes require a numeric value assignment greater than zero.	This error occurs when the administrator tries to leave the 'Maintain Display Order of Groups and Subgroups' without assigning a display order number value in either the group and/or the subgroup category.
Please select a current and future Flex Master Plan for each organization before you select Finished.	This error occurs when the benefits administrator tries to leave the 'Verify Organizations and Flex Master Plans' page without selecting a current and next year Flex Master Plan.
Contribution or coverage amount must be greater than zero and less than 10,000,000.	This error occurs on the 'Maintain Benefits Plan Information – Step 3 of 3' page when the benefits administrator tries to enter a 0 or an amount greater than 10,000,000 in the variable entry box for plans that require a variable entry.
The claims deadline date must be greater than the Flex Master effective date.	This error occurs when the administrator tries to enter an FSA claims deadline that is less than the Flex Master effective date.
The number of days in the initial enrollment window must be greater than zero	This error occurs when the administrator tries to enter a zero in the field for initial enrollment on the 'Maintain Flex Master Plan Information' page.

APPENDIX C

Review of Questions Answered

In This Appendix

About this appendix

This apendix provides answers for the Questions that appear in the Introduction to and at the end of instructional chapters.

Chapter 5

1. What is the function of the Interactive Workforce administrator during implementation?
   The Interactive Workforce administrator's functions include:

   Importing option lists

   Selecting organizations for the load

   Selecting valid user statuses for the extract and load.

   Using Interactive Workforce to access user information extracted from The Solution Series and loaded into Interactive Workforce.

2. Why must the extract and load be run to give newly hired employees access to Interactive Workforce?
   The extract and load process extracts the user IDs from The Solution Series for employees and generates passwords. This information is loaded into Interactive Workforce, and this is the only way to provide employees with access to Interactive Workforce. Only newly hired employees have information entered into The Solution Series; you must extract a user ID and generate a password for them.

3. How often must you import option lists?
   You must import option lists before performing the initial extract and load and each time your organization changes any of the option lists you use in Interactive Workforce.

4. What is the purpose of the extract and load process?
   The extract and load process extracts user information from The Solution Series and creates a file that you can load into the Interactive Workforce database.

5. Why must administrators work together to set some application parameters?
   If you have Interactive Benefits installed, only the organizations selected using the Interactive Workforce administrative function, Organization Selection, are available for setting up benefits enrollment.

6. Why is it important to set your timeout strategy before performing the extract and load?
   If you do not want to keep the default of 90 days for the number of days a user-defined password is valid, you should change the default in this field before beginning the tasks for the extract and load process. If you do not, the time out period for any users that log on and set their new passwords will be 90 days (the default).

7. How are administrators roles assigned in Interactive Workforce?
   The initial administrator or the administrator using the Interactive Workforce administrator logon uses the Account and Password Policies function to select a user and assign one or more administrator functions to the user.

8. What user account functions does the Interactive Workforce administrator control?
   The initial administrator or Interactive Workforce administrator can:

   Reset a user's current password back to the initial password

   Reset an account that has timed out

Delete a user from the Interactive Workforce database. This does not delete the employee records from The Solution Series.

Assign or reassign administrator functions to a user

9. What three options does the Interactive Workforce administrator control for the presentation of pages to users?
Using radio buttons on the Features Management page in the Interactive Workforce administration functions, the administrator can turn the pages off so the pages are not available to users or set the pages for full functionality or view only.

10. Why might you bring the application down?
Interactive Workforce should be brought down before and during a payroll run, for maintenance, during the extract and load process, and when The Solution Series is being maintained.

11. What report contains Interactive Workforce audit trail information?
The Interactive Workforce IS/WAS audit report was designed to provide an audit train for Interactive Workforce.

12. What is the purpose of the Session Number Split Point (SSCTRL) form in The Solution Series?
The main connection between The Solution Series and Interactive Workforce is the STAPI, which receives employee requests from Interactive Workforce, processes those requests through The Solution Series, and returns the response to the browser. Therefore, STAPI needs to use some of the sessions available in The Solution Series.

Chapter 6

1. How is dependent numbering entered into Interactive Workforce?
   Dependent numbers are created by the system as users enter dependent information.

Chapter 7

1. What changes were made to payroll runs for Interactive Workforce and why?
   To suspend and then restart the STAPI two scripts are modified during installation. The pay extract (JPAYXTR) script is modified to suspend STAPI, and the pay merge (JPAYMRG) script is modified to restart STAPI. Every payroll run creates files to update the Pay Information database. To create these update files, JPAYRUN and JMNTRUN have been modified to include the Report Generators 7L7L, Pay Run Extract, and 7M7M, Payslip Extract. These report generators access the Employee Database (FILE02), extract the required data from The Solution Series, and save the data in four text files.
2. How is the Pay Information database populated, and what is its purpose?
   New report generators in The Solution Series, 7L7L (Pay Run Extract) and 7M7M (Payslip Extract) gather pay information in text files during the payrun process. The text files are then loaded into the appropriate Pay Information database tables. The information in these database tables populates the View Pay Information pages, allowing users to view their current pay information and their payments over past pay periods.
3. What payroll administration function must be set up to use the Direct Deposit and Reimbursement accounts in Interactive Workforce?
   The administrator must set up direct deposit HEDs by organization.

Chapter 8

1. What benefits functionality does Interactive Benefits provide to employees?
Interactive Benefits enables employees to enroll in all benefit plans for which they are eligible and select beneficiaries and their allocation of the benefits as well as select dependents for benefit coverage.

2. What function does the flex master perform in Interactive Benefits?
The flex master gathers benefit plans under a flex master "umbrella." The benefits administrator selects a flex master when choosing plans to display in Interactive Workforce for an organization.

3. What is the purpose of subgroups and groups?
Displaying benefit plans by group and then within a subgroup presents an orderly view of plans for users.

4. How do you set the order in which benefits information displays to employees?
The Interactive Benefits administrator uses the functions in the Groups and Subgroups area of the Navigator to set the order in which benefits information displays to employees.

5. What controls the organizations and flex master plans that display on the 'Select flex master plans' page?
Only the organizations selected during the extract and load process display. Interactive Benefits then retrieves the flex masters associated with each of these organizations.

6. What welfare benefit plan information is maintained in Interactive Benefits and why?
The Interactive Benefits administrator enters the time period allowed for initial enrollment and the dates for the open enrollment window as well as any message regarding flexible credits that is applicable based on the organization's benefits rules.

7. How does Interactive Benefits give you control over beneficiaries' ID numbers?
The Interactive Benefits administrator enters the numbering system (starting and incremental numbering scheme) for spouses and dependents.

8. How does Interactive Benefits determine whether to display a page for dependent information during the benefits enrollment process?
The Interactive Benefits administrator uses the Dependent Coverage page to set pages to display dependent information for benefit plans during enrollment.

eCyborg

Interactive Workforce: A Guide to Your Benefits Information

Document Issue: 1.0

Document Issue Status:	First Release
Document Issue Level:	1.0
Document Issue Date:	July 2002
Software Version:	5.0

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Contents

CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the use of eCyborg Interactive Benefits to view your benefit choices and enroll in benefit plans offered by your organization.

This manual has been designed as a reference document. If it is also used in classroom training, you will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by employees whose organizations are using eCyborg's Interactive Benefits module.

Prerequisite skills

Users of this manual should:

- Be familiar with Microsoft Windows functions
- Be familiar with the functions of a web browser

How this manual is organized

This manual has been organized to make it as easy to use as possible. Following are the descriptions of the chapters.

Chapters/ Appendices	Description
1	About this Manual explains how the manual is organized and the conventions used in the manual.
2	Overview of Benefits Plans provides you with an understanding of the types of benefit plans available
3	Using Benefits Functionality gives you an overview and instructions for viewing your benefits information

Chapters/ Appendices	Description
4	Enrolling in Benefits gives you all the information you need to create your benefits enrollments using Interactive Benefits
A	Practice and Review Answers provides answers to the questions used in each chapter to focus your attention on the main tasks you perform

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: *To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.*

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: *To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.*

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

☞ *Refer to a cross-reference to find more detail or more discussion on a given topic.*

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Overview of Welfare Benefits

In This Chapter

Welfare Plans

Any plan from which you receive an immediate benefit is part of the family of welfare benefits. These include health, dental, vision, and life insurance as well as long and short term disability insurance.

Your employer or union selects the health and welfare plan or plans available to you. A plan that allows you to choose some or all of your benefits and that awards credits is a flexible benefits plan. Flexible benefit plans often vary; following are three of the most common types:

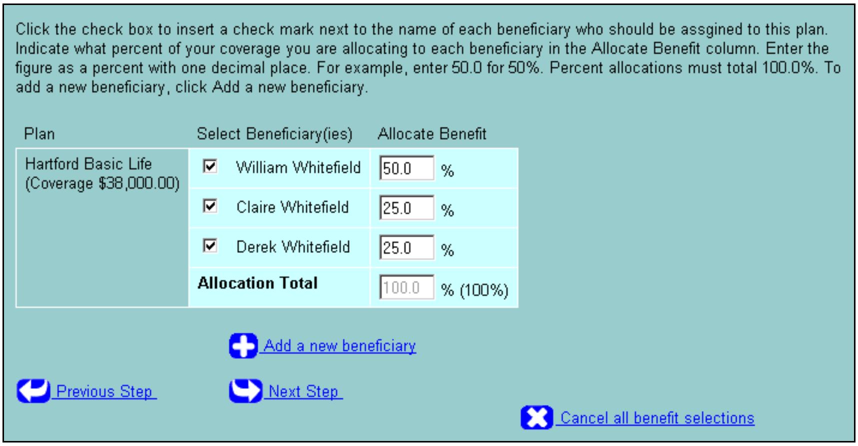
- A core plan/add-on approach provides a minimum level of benefits to all employees but allows each employee to choose additional benefits or more expensive options to enhance the core plans offered by the organization.
- A modular approach allows you a choice between set benefit packages, usually with price increasing as coverage expands.
- Full benefit flexibility allows you to choose among a variety of benefit options to fit your individual needs. This results in either a deduction from pay or extra cash earnings based on the cost of your choice.

When you enroll in benefits using Interactive Benefits, all welfare plans for which you are eligible display. You choose one plan from each of the categories (for example, health, vision, life) for which you are eligible. The following shows the Health Insurance group, which contains Medical Insurance and Prescription Drug subgroups. When the user clicks one of the subgroups the plans in that subgroup display.

				Your net cost/contribution	
Done	**Health Insurance**	Option Elected	Effective	Per Pay Period	Per Year
	Medical Insurance				
	Prescription Drug				

Beneficiaries

When you enroll in a plan that provides a death benefit, you name an individual or individuals (beneficiaries) to benefit from or receive the death benefit. In the event that you die while covered by the plan, the beneficiary or beneficiaries receive the amount for which you are insured. During enrollment you also determine the percentage of the benefit that you want each beneficiary to receive.



After you select a beneficiary using Interactive Benefits, you can change the amount of the benefit allocated to the beneficiary at any time. However, once you enter a beneficiary, you cannot later delete that beneficiary using Interactive Benefits. You must contact the HR department to delete a beneficiary.

See also:

- Adding a beneficiary or updating a beneficiary's details ***(on page 42)***
For detailed directions on adding a beneficiary or updating a beneficiary's details.

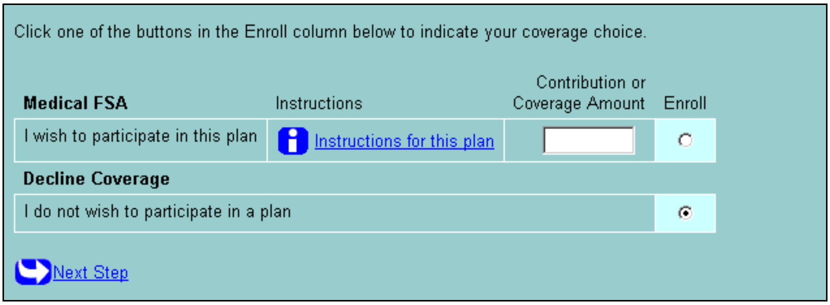
- Adding or updating an institutional beneficiary ***(on page 44)***
For detailed directions on adding or updating an institutional beneficiary.

- Changing beneficiary allocations ***(on page 46)***
For detailed directions on changing beneficiary allocations.

Understanding flexible spending accounts

Your employer may offer a flexible spending account as a benefit. Flexible spending accounts (FSAs) allow you to put a certain amount of pretax earnings into an account that has been set up for a specific purpose. These accounts are subject to special Internal Revenue Code rules and limits to maintain their tax-free status. The two most popular flexible spending accounts cover dependent care expenses (such as day-care) and a medical spending account to cover medical bills not covered by insurance.

When enrolling in benefits using Interactive Benefits, you can either enroll in or waive your rights to these plans. In addition, if you enroll in a flexible spending account plan and your organization administers the plan, you can view the amount of your projected annual contribution and the balance remaining (contributions to date minus processed claims) in your FSA account.



See also:

- Viewing your flexible spending account balances ***(on page 47)***

For detailed directions on viewing flexible spending account balances.

CHAPTER 3

Enrolling in Benefits Online

In This Chapter

Introduction

This section introduces you to the steps required to complete the benefits enrollment process and the information pages that help you understand the process. The pages that display and the links available are specific to you as an employee and to the organization for which you work.

Tasks

This section explains the following:

- Preparing to enroll in benefits
- Understanding your benefits eligibility
- Understanding the Benefits Enrollment Summary page
- Selecting a deduction method
- Selecting family members to cover
- Selecting beneficiaries and designating allocations
- Confirming your enrollment in a plan
- Confirming your costs

Prerequisites

Before you can use Interactive Benefits, you must have the following:

- A browser installed on your PC or on a PC at a kiosk set up for your use
- Access to your organization's intranet with Interactive Benefits installed
- Valid User ID and Password to log on to Interactive Benefits.

Questions answered

The following questions are answered in this section:

1. What is the meaning of 'initial' enrollment in benefits?
2. How do you begin the open enrollment process?
3. What page concludes your enrollment in benefits?

Initial enrollment in benefits compared to open enrollment in benefits

If you are a newly hired employee, you may be able to enroll in benefits immediately or shortly after being hired based on your organization's rules. You have a window of time from the date of your employment in which to complete your benefits enrollments. This benefit enrollment process is called initial enrollment.

If you are an existing employee who has previously enrolled in or declined benefit coverage, you must wait until the open enrollment period unless you have experienced a life status change that affects your benefits eligibility. Open enrollment is a window of time during which all existing employees in the organization have the opportunity to select their benefit coverage options for the following 12 months. Open enrollment takes place during the current coverage period. During open enrollment you choose your coverage for the next coverage period, usually a calendar year.

Initial enrollment in benefits

The following benefit enrollment links display on the Navigator if you are a newly hired employee enrolling in benefits:

- **Important Information about Benefits Enrollment**: Explains the initial benefits enrollment process in Interactive Benefits
- **Benefits Eligibility**: Shows the benefit plans for which you are eligible along with a detailed description of each plan.
- **Enroll in Benefits**: Begins the benefit enrollment process.

The Important Information page provides instructions concerning the benefits enrollment process. The information includes instructions for printing the page, an explanation of the links on the Benefits Eligibility page, and dependents and beneficiaries information you need to complete for the enrollment process.

Note: *Remember that all pages will not fit on a portrait page when you print the page. In this case, when printing from your browser, select the Layout tab and change the orientation to Landscape.*

Open enrollment

During open enrollment, you can access the following information pages if you are an existing, rather than a newly hired, employee. To access the pages, click Benefits Enrollment and select Important Information. The system displays a page with three tabs:

- **Welcome to Benefits Enrollment**: Explains the benefits enrollment process in Interactive Benefits.
- **What's new this year:** Contains information for the benefit plans available or the enrollment process that differs from the previous year's information.
- **About the Enrollment Process:** Explains the open enrollment process and contains instructions for benefits enrollment in Interactive Benefits.

When you select the Benefits Eligibility link on the Navigator, the system displays additional pages with the following benefits information that is specific to you:

- **Benefit Choices**: Shows the benefit plans for which you are eligible along with a description of each plan. This page may also contain links to additional benefit information and flexible benefits credits if applicable to your organization.
- **Information About You**: Contains employment information about you that may affect your benefits enrollment. Be sure to read this page carefully and contact your HR department if any information is incorrect.

The remainder of the enrollment process is similar whether you are a newly hired employee or an employee who has previously completed the enrollment process.

Overview of the enrollment process

Interactive Benefits provides you with the ability to enroll in your welfare benefit plans online. The enrollment process for each benefit plan subgroup differs slightly depending on the characteristics of the plan and the plan options you select. For example, the process differs depending on whether the benefit plan you selected provides coverage for family members, provides a benefit to beneficiaries, or allows you to choose between pre- and post-tax deduction. If you do not choose to enroll in a benefit plan you must indicate that by clicking 'I do not wish to participate in a plan.'

If you are currently enrolled in a benefit plan at your organization, the pages to be completed as steps in the enrollment process display your current choices. You have the option of making changes to your choices for the new enrollment year or retaining your current enrollments. The Interactive Benefits pages that display, the links available on pages, and the steps to complete enrollment differ based on the benefit plan and the plan options you select.

- If you select an option in a plan that covers dependents, a page displays from which you can choose the family members to cover.
- If the plan requires beneficiaries, a page displays from which you can select beneficiaries.
- If the plan allows you to choose between pre-tax and post-tax earnings to cover the costs of the plan, a page displays from which you can choose a deduction method.
- If a plan requires a contribution or a choice of coverage amounts, a page displays from which you can make this choice.

Therefore, the number of steps required to enroll in each plan differ based on the plan requirements and the options you select.

Beginning enrollment

You begin the benefits enrollment process from the Benefits Enrollment link on the Navigator. Links on the Benefits Enrollment section of the Navigator provide you with enrollment information and enable you to begin the enrollment process.

Benefits eligibility

When you select the Benefits Eligibility link on the Navigator, the system displays pages with the following benefits information that is specific to you:

- **Benefit Choices**: Shows the benefit plans for which you are eligible along with a description of each plan. This tab page also contains links to access additional information.
  - The 'Show me how flexible benefits credits are calculated and applied' page explains how benefits credits are determined and applied to the cost of elected benefits.
  - The 'Show me additional information about my benefit choices' page lists the plans for which you are eligible and contains a short description of each plan.
- **Information About You**: Contains employment information about you that may affect your benefits enrollment. Be sure to read this page carefully and contact your HR department if any information is incorrect.

To begin the enrollment process for Open Enrollment, click 'Enroll in Benefits'.

Other Personal Details page

The first page that appears when you start the open enrollment process is the Other Personal Details page. If you have not completed this page previously, you must complete this information. You cannot access benefits enrollment pages until this information exists in the system.

Benefits Enrollment Summary page

The Benefits Enrollment Summary page gives you information about the plans offered by your organization for which you are eligible. Plans are organized into groups such as Health Plans and Life Insurance Plans. Each group contains one or more subgroups. For example, the Health Plans group may contain the subgroups Medical Insurance, Dental Insurance, Vision Insurance, and/or Prescription Drug Plan.

				Your net cost/contribution	
Done	**Health Insurance**	Option Elected	Effective	Per Pay Period	Per Year
	Medical Insurance				
	Prescription Drug				

Select one plan from each subgroup. You click the subgroup name to access the page where you enroll in one of the plans available for the subgroup. When you click the subgroup Medical Insurance, Interactive Benefits displays the medical insurance plans available for which you are eligible. As you enroll in a plan, the system adds a checkmark in the Done column for that subgroup.

The information on the Benefits Enrollment Summary page differs based on whether your organization uses flex credits and how the credits are allocated and deducted. The following optional information may appear on the Benefits Enrollment Summary page based on your organization's use of flex credits.

- **Total Flex Credits Awarded**: If your organization provides flex credits and allocates credits using the net credits method, a table shows, per pay period and per year, the total flex credits awarded, spent, and the balance. If your organization deducts credits by plan but allocates credits in a lump sum, the chart shows only the total flex credits awarded and the flex credits spent.

See also:

- Understanding your benefits eligibility ***(on page 22)***

For detailed directions on preparing to enroll in benefits.

- Understanding the Benefits Enrollment Summary page ***(on page 23)***

For detailed directions on preparing to enroll in benefits.

Enrolling in a plan

The steps to complete enrollment in a welfare benefit plan and the options that appear on the pages differ based on the plan you selected. After clicking a plan subgroup on the Benefits Enrollment Summary page, complete the steps required to enroll in each plan. Interactive Benefits displays a page for each step of the enrollment process. After entering the information required by the step, click the Next Step link to continue to the next step in the process.

The pages that display differ based on the benefits to which the plan entitles you.

- If the plan allows you a choice between pre-tax and post-tax payroll deductions, you select a radio button to indicate whether you want the cost of the plan paid for with pre-tax or post-tax earnings.
- If the plan requires that you designate beneficiaries, the page displays a summary of your beneficiaries. You check a checkbox for each beneficiary to be covered and assign a percentage of the benefit to the beneficiary. Links on the page allow you to add a new beneficiary. Clicking the link displays a page on which you can enter the new beneficiary information or, if the beneficiary is an institution, access the Institutional Beneficiaries page to enter institutional information.
- If you have a new family member for whom you want to provide coverage, links on the enrollment page allow you to add a new family member. However, based on plan rules you may only be allowed to provide benefits coverage to immediate family members, such as a spouse and children.

Step numbers are added to pages dynamically during enrollment. However, Step 1 is always Choose a plan, and the last step is always a confirmation of the options you chose for a plan unless you waived enrollment. All steps in the process display an option that allows you to Cancel all benefit selections and begin the entire enrollment process over.

Links at the bottom of the page allow you to return to the previous step, continue to the next step, or cancel your benefit selections for all benefit plans.

See also:

- Step 1: Choose a plan ***(on page 25)***

For detailed directions on choosing a benefit plan.

- Selecting a deduction method ***(on page 27)***

For detailed directions on selecting a deduction method.

- Selecting family members to cover ***(on page 28)***

For detailed directions on selecting family members to cover.

- Selecting beneficiaries and allocations ***(on page 30)***

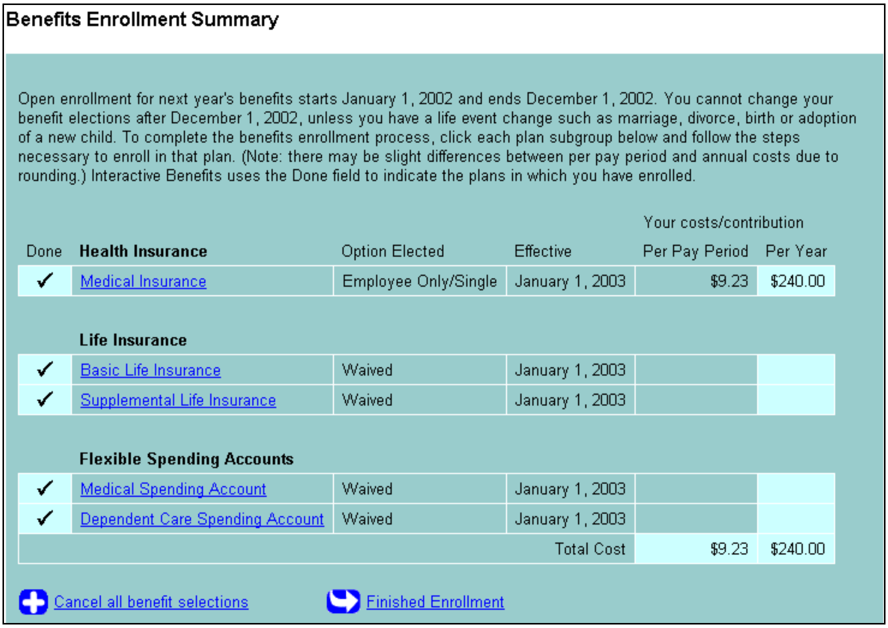
For detailed directions on selecting beneficiaries and allocations.

Confirm enrollment page

The final page that displays as you complete enrollment in each plan shows the following information for the plan:

- Effective date
- Option you elected
- Cost
- Covered dependents, or, if a death benefit, the coverage amount and beneficiaries

Links at the bottom of the page allow you to return to the previous step, cancel your benefit selections, or click OK to accept your choices. If you accept your choices, the system returns you to the Benefits Enrollment Summary page. You can then select another benefit subgroup from the list of benefits for which you are eligible and complete the steps to enroll in another plan.



Benefits Enrollment Summary

Open enrollment for next year's benefits starts January 1, 2002 and ends December 1, 2002. You cannot change your benefit elections after December 1, 2002, unless you have a life event change such as marriage, divorce, birth or adoption of a new child. To complete the benefits enrollment process, click each plan subgroup below and follow the steps necessary to enroll in that plan. (Note: there may be slight differences between per pay period and annual costs due to rounding.) Interactive Benefits uses the Done field to indicate the plans in which you have enrolled.

				Your costs/contribution	
Done	**Health Insurance**	Option Elected	Effective	Per Pay Period	Per Year
✓	Medical Insurance	Employee Only/Single	January 1, 2003	$9.23	$240.00
	Life Insurance				
✓	Basic Life Insurance	Waived	January 1, 2003		
✓	Supplemental Life Insurance	Waived	January 1, 2003		
	Flexible Spending Accounts				
✓	Medical Spending Account	Waived	January 1, 2003		
✓	Dependent Care Spending Account	Waived	January 1, 2003		
			Total Cost	$9.23	$240.00

Cancel all benefit selections   Finished Enrollment

When you have completed enrolling in all plans for which you are eligible, you click Finished enrollment, which updates the system with your enrollment choices.

See also:

- Confirming your enrollment in a plan ***(on page 32)***

For detailed directions on confirming enrollment in a plan.

Confirm costs page

When you complete enrollment in all plans for which you are eligible and click the Finished Enrollment link on the Benefits Enrollment Summary page, the system displays the Enrollment Confirmation page. On this page you can view the cost or coverage amount for each plan you selected and the total cost for all plans by pay period and by year.

Links on the page allow you to change elections and return to the Benefits Enrollment Summary page, view information on how your flexible benefits credits are calculated and applied, or click OK to accept your enrollment choices and associated costs.

This page confirms that you enrolled successfully. Your benefit choices are not saved until you see this page. Following is a part of the Enrollment Confirmation page.

You have successfully completed your enrollment in benefits. A summary of your enrollment choices is shown below. Review this information thoroughly. You should also review the costs for each plan and the total cost of your enrollment.

Note that You will not be able to change these elections after the end of open enrollment unless you have a recognized life status change such as marriage, divorce, birth or adoption of a child. During open enrollment you can change your enrollment elections at any time. To make changes, select 'Enroll in Benefits' from the Navigator and step through the enrollment process to change your elections.

Your Total Cost

Per Pay Period :	$15.14
Per Year :	$787.20

BC/BS Indemnity

Effective :	January 1, 2003
Option Elected :	Employee Only/Single
Cost (before credits are applied) :	$4.62 Per Pay Period pre-tax deduction

Hartford Suppl Life

Effective :	January 1, 2003
Option Elected :	Enrolled
Coverage Amount :	$76,000.00
Beneficiaries :	Derek Whitefield Claire Whitefield William Whitefield
Cost (before credits are applied) :	$10.52 Per Pay Period pre-tax deduction

Note *The link to information on flexible credits displays only if your organization awards flexible credits.*

See also:

- Confirming your costs ***(on page 33)***

For detailed directions on confirming costs.

Detailed Directions

This section provides detailed instructions for the tasks summarized in the previous section.

Tasks

Preparing to enroll in benefits

When you click the link, Important Information, Interactive Benefits displays a page containing tabs to access information to help you in the enrollment process.

1. Access the Important Information page

On the Employee area of the Navigator click Benefits Enrollment and Important Information.

Employee ▶ Benefits Enrollment ▶ Important Information

For practice, access the Important Information page for user 4001.

If you completed the Guided Practice, the resulting page should have the following tabs:

2. View the Welcome to Benefits Enrollment page

To learn more about the open enrollment process, read the Welcome to Benefits Enrollment information.

For practice, access the Welcome to Benefits Enrollment page.

3. View the What's New this Year page

To learn what changed in your organization's benefit plans for the new enrollment period, read the What's New this Year information.

For practice, access the More details information page.

4. View the About the Enrollment Process page

To learn how to enroll in benefits using Interactive Benefits, read the About the Enrollment Process page.

For practice, access the What's new this year page.

5. Choose another function

When you finish reading the information about enrollment, choose another function from the Navigator or, if you're ready to enroll in benefits, click the Enroll in Benefits link.

For practice, select another function from the Navigator.

See also:

- Overview of the enrollment process ***(on page 15)***

For more information about the benefits enrollment process.

Understanding your benefits eligibility

When you click the link, Benefits Eligibility, Interactive Benefits displays a page containing tabs to access information to help you understand factors in the enrollment process that affect you.

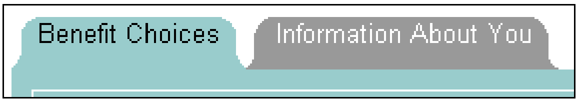
1. Access the Benefits Eligibility page

Access this page by clicking Benefits Eligibility in the Benefits Enrollment section of the Navigator.

Employee ▶ Benefits Enrollment ▶ Benefits Eligibility

For practice, access the Benefits Eligibility page for user 4001.

If you completed the Guided Practice, the resulting page should have the following tabs:



2. View the Benefit Choices page

To learn more about the welfare benefit plans for which you are eligible, read your Benefit Choices information. This page may contain links to additional information specific to your organization. Be sure to click the links and read the information.

For practice, view the Benefit Choices page.

3. View the Information About You page

Check the information on the Information About You page to be sure it is correct. The enrollment choices available to you are based on this information. Contact your HR department immediately if the information is not correct.

For practice, access the Information About You page.

2. Choose another function

When you finish reading the information about enrollment, choose another page to view or begin the enrollment process.

For practice, click Start the benefits enrollment process.

See also:

- Overview of the enrollment process ***(on page 15)***

For more information about the benefits enrollment process.

Understanding the Benefits Enrollment Summary page

You begin the benefits enrollment process from the Benefits Enrollment Summary page. This page lists the welfare benefit plans for which you are eligible. The plans are grouped by type, for example, Health Plans, Life Insurance Plans, and so on. Each of these groups contain a subgroup or subgroups. For example, the Health Plans group may contain the subgroups medical insurance, dental insurance, and/or prescription drug plans. The subgroups display in a checklist format.

				Your net cost/contribution	
Done	**Health Insurance**	Option Elected	Effective	Per Pay Period	Per Year
	Medical Insurance				
	Prescription Drug				

When you click the subgroup name, the plans in that subgroup for which you are eligible to enroll display on the page. Click a subgroup to access the plan or plans available for that subgroup and begin the welfare benefit enrollment process. After you enroll in a plan in each subgroup, the system adds a checkmark in the Done column.

Each subgroup in the checklist has the following columns:

- Option Elected
- Effective
- Your cost/contribution per pay period
- Your cost/contribution per year

As you enroll in welfare benefit plans, the system completes the information in these columns so that you can always see the options you elected. The system may display the total cost to you based on your enrollment choices. How your cost/contribution displays depends on:

- Whether your organization uses credits and the method used to deduct and allocate credits.
- Whether the cost must be calculated in Benefits Administration on the server and returned to Interactive Benefits.

If your organization offers flexible credits, the flexible credits available per pay period and per year display along with a calculation of the amount you spent during your enrollment process. The balance remaining, if any, displays unless your organization deducts credits by plan even though they allocated them in a lump sum.

The last step for the enrollment process in a plan contains a link that allows you to Cancel all benefit selections. If you click this link, none of the changes you made to your enrollments since the last time you clicked the Finished Enrollment link will be saved, and you must begin the benefit enrollment process from the start. If you had previously completed the enrollment process, when you click this link, your benefit choices will revert to the enrollment choices you made at that time.

To begin your enrollment in a welfare benefit plan, follow these steps:

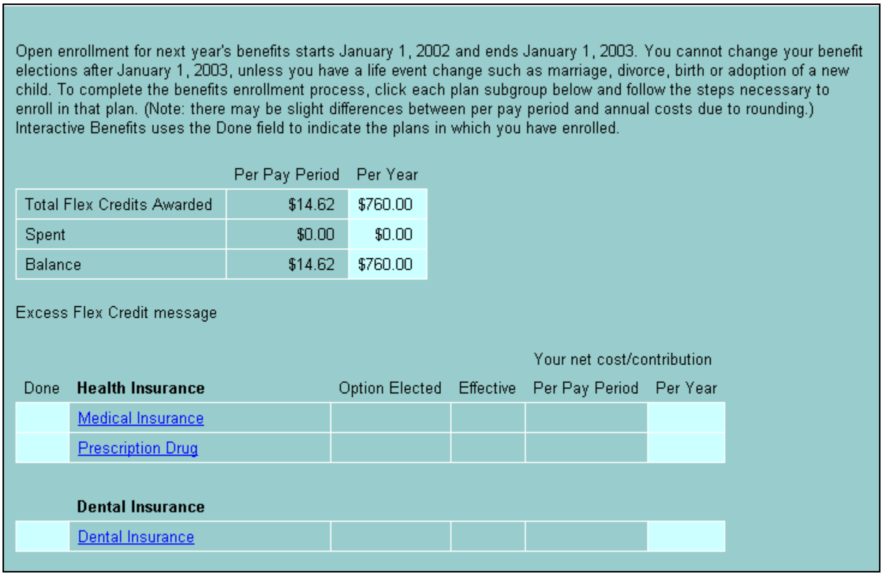
1. Access the Benefits Enrollment Summary page

On the Employee area of the Navigator, click Benefits Enrollment, and, if necessary, complete the Other Personal Details page.

Employee ▶ Benefits Enrollment ▶ Enroll in Benefits ▶ Other personal Details ▶ Benefits Enrollment Summary

For practice, access the Benefit Enrolment Summary page for user 4001.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



Open enrollment for next year's benefits starts January 1, 2002 and ends January 1, 2003. You cannot change your benefit elections after January 1, 2003, unless you have a life event change such as marriage, divorce, birth or adoption of a new child. To complete the benefits enrollment process, click each plan subgroup below and follow the steps necessary to enroll in that plan. (Note: there may be slight differences between per pay period and annual costs due to rounding.) Interactive Benefits uses the Done field to indicate the plans in which you have enrolled.

	Per Pay Period	Per Year
Total Flex Credits Awarded	$14.62	$760.00
Spent	$0.00	$0.00
Balance	$14.62	$760.00

Excess Flex Credit message

				Your net cost/contribution	
Done	**Health Insurance**	Option Elected	Effective	Per Pay Period	Per Year
	Medical Insurance				
	Prescription Drug				
	Dental Insurance				
	Dental Insurance				

2. Access the plans available for a benefit subgroup

When you click any of the subgroups in the checklist, the system displays the Step 1—Choose a Plan page. You continue your enrollment process on this page.

OR

If you have enrolled in a plan for each subgroup, click Finished Enrollment

If you are satisfied with your choices, click Finished Enrollment. This link appears only when you have enrolled in a plan or waived enrollment for each subgroup and a checkmark appears in the Done column for each subgroup.

Note *You must access the plans available for all the subcategories of welfare benefit plans that appear on the Benefits Enrollment Summary page. You have not completed the enrollment process until a checkmark appears in the Done column for all subcategories of welfare benefits.*

For practice, click Medical Insurance.

See also:

- Beginning enrollment ***(on page 16)***

For more information about beginning to enroll in benefit plans.

Step 1: Choose a plan

You must repeat the enrollment steps for all the subcategories of welfare benefit plans that appear on the Benefits Enrollment Summary page. To continue the benefits enrollment process, follow these steps:

1. Access the Step 1: Choose a plan page

Access this page by clicking a benefits subgroup on the Benefits Enrollment Summary page.

Employee ► Benefits Enrollment ► Enroll in Benefits ► Benefits Enrollment Summary ► Step1: Choose a plan

For practice, access the Step 1: Choose a plan page for user 4001.

2. Enroll in a welfare benefit plan

To enroll in a welfare benefit plan, click the radio button in the enroll column to indicate your choice of plan and its options. You can make only one selection. If you were enrolled in this plan for the current benefit year, your present choices appear on this page. You have the option to change your selection or keep your present choices.

Step 1: Choose a plan

Click one of the buttons in the Enroll column below to indicate your coverage choice.

BC/BS Indemnity	Cost Per Pay Period	Cost Per Year	Enroll
Employee Only/Single	$4.62	$240.00	○
Employee & Spouse	$4.62	$240.00	○
Family/EE & All Deps	$5.77	$300.00	◉
Cigna PPO	Cost Per Pay Period	Cost Per Year	Enroll
Employee Only/Single	$23.08	$1,200.00	○
Employee & Spouse	$57.69	$3,000.00	○
Family/EE & All Deps	$96.15	$5,000.00	○

OR

Enter a contribution or coverage amount

If the plan requires a variable amount, such as a flexible spending account, enter the contribution or coverage amount.

Click one of the buttons in the Enroll column below to indicate your coverage choice.

Medical FSA	Instructions	Contribution or Coverage Amount	Enroll
I wish to participate in this plan		1000.00	◉
I wish to participate in this plan		1000.00	
I wish to participate in this plan		1000.00	
Decline Coverage			
I do not wish to participate in a plan			○

Next Step

OR

Decline coverage

If you do not want to enroll in a plan associated with the subgroup you selected, click the radio button to the right of 'I do not wish to participate in a plan'.

Note *This option appears only if your employer allows you to decline coverage of this plan.*

Whether you enroll in benefits or you decline coverage, when you complete the enrollment process and the open enrollment time period expires, you cannot change your choice(s) using Interactive Benefits. During the open enrollment time period, you can change your options as often as you like.

For practice, enroll in the Cigna PPO family plan.

3. Access the next step in the enrollment process

If you are continuing with the enrollment process, click Next Step to access the next step in the benefits enrollment process. You cannot return to the previous page; however, if you prefer not to continue, you can click Log Off to log off the system or click Inbox.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Selecting a deduction method

As you continue the benefits enrollment process, the system will allow you to choose whether to deduct the plan cost as a pre-tax or post-tax deduction.

1. Access the Select deduction method page

This page displays when you click Next Step only if the plan in which you are enrolling allows you to choose to pay with either pre-tax or post-tax earnings.

Employee ▶ Benefits Enrollment ▶ Enroll in Benefits ▶ Benefits Enrollment Summary ▶ Step1: Choose a plan ▶ Select deduction method

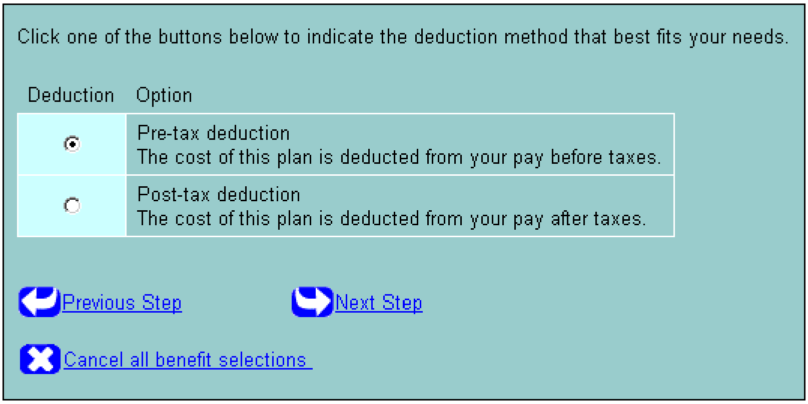
For practice, access the Select deduction method page for user 4001.

2. Choose a deduction method

Select a deduction method by clicking the radio button in the left column. You can have the cost of this plan deducted from your earnings before taxes are calculated (pre-tax) or after taxes are calculated (post-tax earnings). Deducting the cost on a pre-tax basis, may lower the amount of taxes you pay.

For practice, click Pre-tax deduction.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



OR
Return to the previous step

To return to Step 1: Choose a plan to view or change your selection, click Previous Step.

OR
Cancel all benefit selections

To begin the benefit enrollment process again, click Cancel all benefit selections. The system returns you to the Benefits Enrollment Summary page. If you click this link, none of the changes you made to your enrollments since the last time you clicked the Finished Enrollment link will be saved, and you must begin the benefit enrollment process from the start. If you had previously completed the enrollment process, when you click this link, your benefit choices will revert to the enrollment choices you made at that time.

For practice, click Next Step.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Selecting family members to cover

To continue the benefits enrollment process in a benefit plan that allows coverage of dependents, follow these steps:

1. Access the Select family members to cover page

This page displays when you click Next Step only if the plan in which you are enrolling provides coverage for your family members.

Employee ▶ Benefits Enrollment ▶ Enroll in Benefits ▶ Benefits Enrollment Summary ▶ Select deduction method ▶ Step1: Choose a plan (that provides coverage to family members) ▶ Select family members to cover (if applicable)

For practice, access the Select family members to cover page.

2. Choose the family members you want the benefit plan to cover

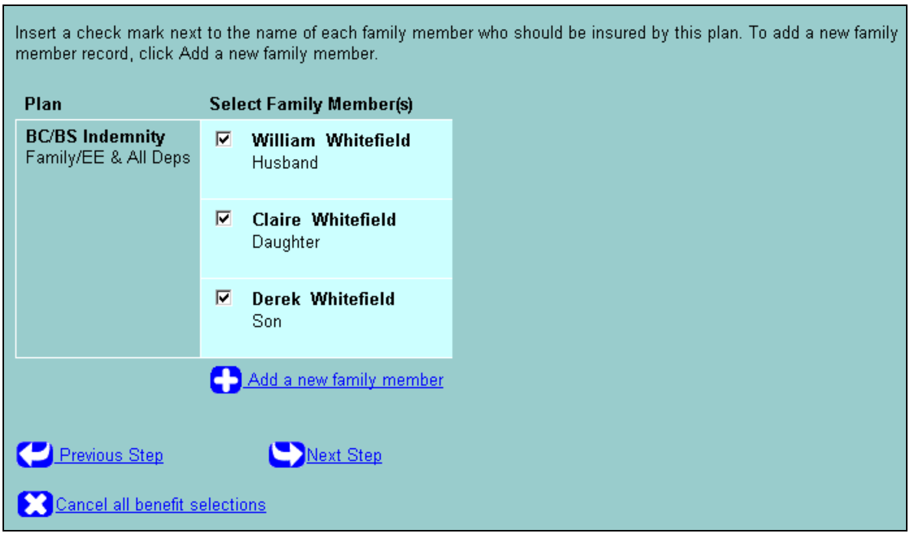
This page displays the members of your family retrieved from your personal details information. To include coverage for a family member, position your cursor over the checkbox to the left of family member's name, and click to place a checkmark in the box.

If your family includes members not listed on this page, click Add a new family member to add that individual. On the Family Member Details page enter the information for the additional family member. When you Save Changes on the Family Member Details page, the systems returns you to Select family members to cover. The page now contains information for the new family member. You can add a checkmark to the checkbox to include coverage for that member under this welfare benefit plan.

Note *For benefits enrollment, depending on the coverage option you selected, you can select only your immediate family members, such as your spouse and your children, from the list of family members for benefits coverage. If you selected a coverage option such as employee + spouse, you can provide coverage only for your spouse and yourself.*

For practice, select all family members for user 4001.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. Click Next Step to continue the enrollment process

Click Next Step to access the next step in the welfare benefits enrollment process.

OR

Add a new family member

To access the Update Family Member page and add a new family member as a dependent, click Add a new family member.

OR

Return to the previous step

To return to the previous step, click Previous Step.

OR

Cancel all benefit selections

To begin the benefit enrollment process again, click Cancel all benefit selections. The system returns you to the Benefits Enrollment Summary page.

For practice, click Next Step.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Selecting beneficiaries and allocations

Using this page you can:

- Select or deselect an individual as a beneficiary
- Allocate a portion of your insurance benefit to a beneficiary
- Add a new individual or institution as a beneficiary

To continue the benefits enrollment process for a plan that requires beneficiaries, follow these steps:

1. Access the Select beneficiaries and allocations page

This page displays when you click Next Step only if the plan in which you are enrolling requires beneficiaries.

Employee ► Benefits Enrollment ► Enroll in Benefits ► Benefits Enrollment Summary ► Step1: Choose a plan (that requires beneficiaries) ► Select beneficiaries and allocations

Interactive Benefits displays the Select beneficiaries and allocations page.

For practice, use the 4001 employee ID and choose Dependent Life Insurance on the Benefits Summary page to access the Select beneficiaries and allocations page for user 4001.

2. Select your beneficiaries

To select an individual from the list of beneficiaries, place your cursor over the checkbox to the left of the individual's name, and click to insert a checkmark. Then enter the percentage of your benefit to allocate to the beneficiary. To deselect an individual as a beneficiary, remove the checkmark from the box.

To Add a new beneficiary, click Add a new beneficiary. Interactive Benefits displays the Beneficiary Details page. Enter the information for the new beneficiary. If the new beneficiary is an institution, access the Institutional Beneficiaries page.

When you Save Changes on either of these pages, the system returns you to Select beneficiaries and allocations. The page now contains the information for the new beneficiary. You can add a checkmark to the checkbox and enter a percentage to allocate benefits to this beneficiary.

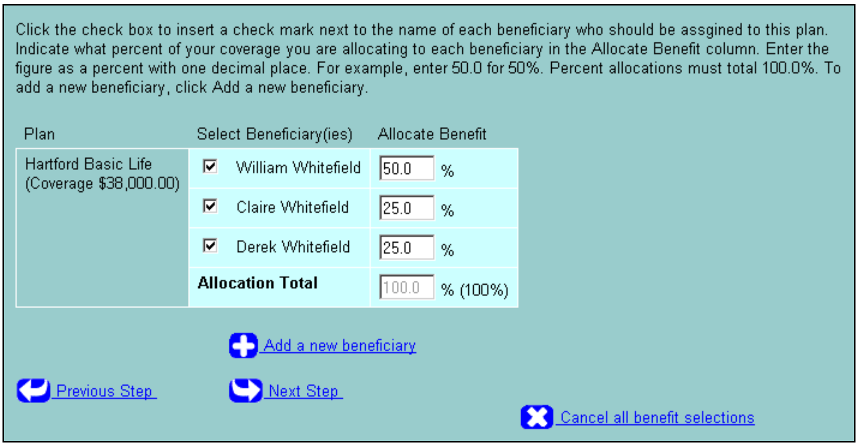
For practice, select all family members.

3. Enter the percent allocation for each beneficiary

To add or change the allocation of a benefit, click the allocation percent and highlight the existing allocation. Enter the new allocation as a percent with one decimal place. For example, enter 50% as 50.0. Percent allocations must total 100.0 per cent.

For practice, enter 50% for Bill Whitefield and 25% for each of the other beneficiaries.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



4. Click Next Step

Click Next Step to access the next step in the welfare benefits enrollment process.

OR

Add a new beneficiary

To add a new beneficiary to the list of your beneficiaries, click Add a new beneficiary. Interactive Benefits displays the Beneficiary Details page. If the beneficiary is an institution, you can access the Institutional Beneficiaries page from the Beneficiary Details page.

OR

Click Previous step

To return to the previous step, click Previous Step.

OR

Click Cancel

To begin the benefit enrollment process again, click Cancel all benefit selections. The system returns you to the Benefits Enrollment Summary page where you can restart the enrollment process.

For practice, click Next Step.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Confirming your enrollment in a plan

The Confirm Enrollment page displays the enrollment choices you made in the benefit plan. To complete your enrollment in each plan, follow these steps:

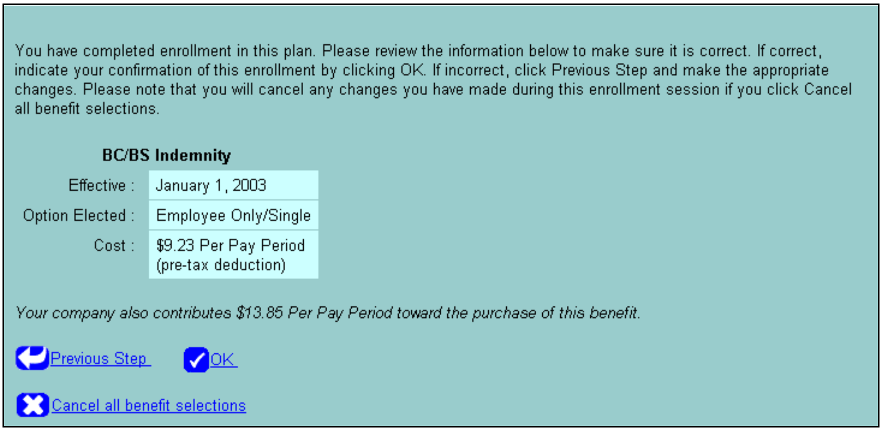
1. Access the Enroll in Benefits confirmation page

If you followed the steps to enroll in a benefits plan, the Confirm enrollment page displays.

Employee ▶ Benefits Enrollment ▶ Benefits Enrollment Summary ▶ Step1: Choose a plan ▶ Selecting beneficiaries and allocations or Select family members to cover ▶ Confirm Enrollment

For practice, access this page by clicking Next Step.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



You have completed enrollment in this plan. Please review the information below to make sure it is correct. If correct, indicate your confirmation of this enrollment by clicking OK. If incorrect, click Previous Step and make the appropriate changes. Please note that you will cancel any changes you have made during this enrollment session if you click Cancel all benefit selections.

BC/BS Indemnity

Effective :	January 1, 2003
Option Elected :	Employee Only/Single
Cost :	$9.23 Per Pay Period (pre-tax deduction)

Your company also contributes $13.85 Per Pay Period toward the purchase of this benefit.

Previous Step OK

Cancel all benefit selections

2. Complete your welfare benefits enrollment

If you are satisfied with your choices for the plan, click OK to complete your enrollment in this plan. The system returns you to the Benefits Enrollment Summary page where you can enroll in another welfare benefit plan if additional plans are available to you.

OR

Return to the previous step

If you are not satisfied with your choices, click Previous Step until you return to the page where you want to make changes.

OR

Cancel all benefit selections

To begin the benefit enrollment process again, click Cancel all benefit selections. The system returns you to the Benefits Enrollment Summary page.

For practice, click OK. The system returns you to the Benefits Enrollment Summary page.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Confirming your costs

This page displays your total benefit costs per pay period and per year along with the benefit enrollment choices you made.

1. Access the Confirm costs page

To access this page you must have completed your benefits enrollments for the plan year. If you have done this, a checkmark appears in the Done column for all the benefit plan sub-groups on the Benefit Enrollment Summary page and the button, Finished Enrollment, displays at the bottom of the page.

Employee ► Benefits Enrollment ► Benefits Enrollment Summary ► Confirm Costs

For practice, access the Benefits Enrollment Summary page for user 4001. Make sure a checkmark appears in the left column of each subgroup and that the Finished Enrollment button appears at the bottom of the page. If checkmarks do not appear for each group and the Finished Enrollment button does not appear at the bottom of the page, enroll in or waive enrollment in a plan for each subgroup until a checkmark appears in the left column and the Finished Enrollment button displays.

2. Click Finished Enrollment to accept your welfare benefit enrollment choices

When you click Finished Enrollment on the Benefits Enrollment Summary page, the system displays the Confirm Cost page.

OR

Click Change Elections to begin the enrollment process over

If you want to change any of your enrollment choices, click Change Elections. This cancels your enrollment in all benefit plans for which you are eligible. the system displays the Benefits Enrollment Summary page from which you can access welfare benefit plan information to begin the enrollment process over.

Note *'Cancel all benefit selections' does not appear on this page if you accessed this page using Change Elections on the Confirm Costs page.*

For practice, click Finished Enrollment.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:

You have successfully completed your enrollment in benefits. A summary of your enrollment choices is shown below. Review this information thoroughly. You should also review the costs for each plan and the total cost of your enrollment.

Note that You will not be able to change these elections after the end of open enrollment unless you have a recognized life status change such as marriage, divorce, birth or adoption of a child. During open enrollment you can change your enrollment elections at any time. To make changes, select 'Enroll in Benefits' from the Navigator and step through the enrollment process to change your elections.

Your Total Cost

Per Pay Period :	$15.14
Per Year :	$787.20

BC/BS Indemnity

Effective :	January 1, 2003
Option Elected :	Employee Only/Single
Cost (before credits are applied) :	$4.62 Per Pay Period pre-tax deduction

Hartford Suppl Life

Effective :	January 1, 2003
Option Elected :	Enrolled
Coverage Amount :	$76,000.00
Beneficiaries :	Derek Whitefield Claire Whitefield William Whitefield
Cost (before credits are applied) :	$10.52 Per Pay Period pre-tax deduction

3. Click OK to confirm your benefit choices and their cost

Review the cost of your benefit choices. If you are satisfied with your selections and their costs, click OK. You have successfully completed your welfare benefits enrollment.

See also:

- Enrolling in a plan ***(on page 18)***

For more information about enrolling in a benefits plan.

Review of Questions Answered

1. What is the meaning of 'initial' enrollment in benefits?

2. How do you begin the open enrollment process?

3. What page concludes your enrollment in benefits?

CHAPTER 4

Using the Benefits Functionality

In This Chapter

Introduction

This section helps you understand the Interactive Benefits functions you can use to view and change your benefits information online.

Tasks

This section explains the following:

- Viewing your current and next year benefit enrollments
- Viewing and updating your beneficiaries
- Adding a beneficiary or updating a beneficiary's details
- Adding or updating an institutional beneficiary
- Changing beneficiary allocations
- Viewing your flexible spending account balances

Prerequisites

Before you can use Interactive Benefits, you must have the following:

- A browser installed on your PC or on a PC at a kiosk set up for your use
- Access to your organization's intranet with Interactive Benefits installed
- Valid User ID and Password to log on to Interactive Benefits

Questions answered

1. How can I view my current benefit enrollments?
2. How can I allocate different amounts to different beneficiaries?
3. What is a flexible spending account?

Benefit Choices

Using Interactive Benefits you can view your benefit enrollments, update your beneficiary information, and view your flexible spending account balances.

Your Benefits Enrollments

Using Interactive Benefits you can view your current benefit enrollment choices online. When you choose Benefits from the Employee section of the Navigator and select Current Enrollments, the system displays all the benefit plans for which you are enrolled. You can view, by plan:

- The cost of the plan per pay period and whether you elected to have the cost deducted as a pre-tax or post-tax payment
- Options you elected for the plan
- Dependents or beneficiaries you selected

The system also displays the total cost of all your benefit plans by pay period and for the entire year.

If you have already selected your benefit enrollments for the next year, you can also view the previous information for all the plans you chose for the following year.

Your Beneficiaries

During the enrollment process, you had the opportunity to choose beneficiaries for any plan that paid a death benefit. If, during the plan year, you want to change the percentage of benefit allocated to a beneficiary, you can use the Beneficiaries page in the Benefits area of the Navigator to reallocate the benefit.

To remove benefits from a beneficiary, you can change the percentage for that beneficiary to zero (0). To delete a beneficiary or add a new beneficiary during the plan year, you must contact your HR department.

Your flexible spending account balances

If your organization makes flexible spending accounts available and manages those accounts and you enrolled in one, you can view information about your balances online using Interactive Benefits. The Flexible Spending Account Balances page displays:

- The name of the account
- Your projected annual contribution
- Balance in the account (plan contributions to date minus the claims processed as of a specified date

Using the Flexible Spending Account Balances page helps you easily keep track of expenditures you made for any of the accounts to which you are making contributions.

If you have enrolled in a plan for the current year and the period for which you can submit claims for the prior year has not expired, you can see the account details for both years.

Detailed Directions

This section provides detailed instructions for the Interactive Benefits features discussed in the previous section.

Tasks

Viewing your current benefit enrollments

If you enroll in benefit plans sponsored by your organization, you can view your current year benefit choices online by following these steps:

1. Access the Current Enrollments page

In the Employee area of the Navigator, click Benefits and select Current Enrollments.

Employee ▶ Benefits ▶ Current Enrollments

For practice, access the Current Enrollments page for User 4001.

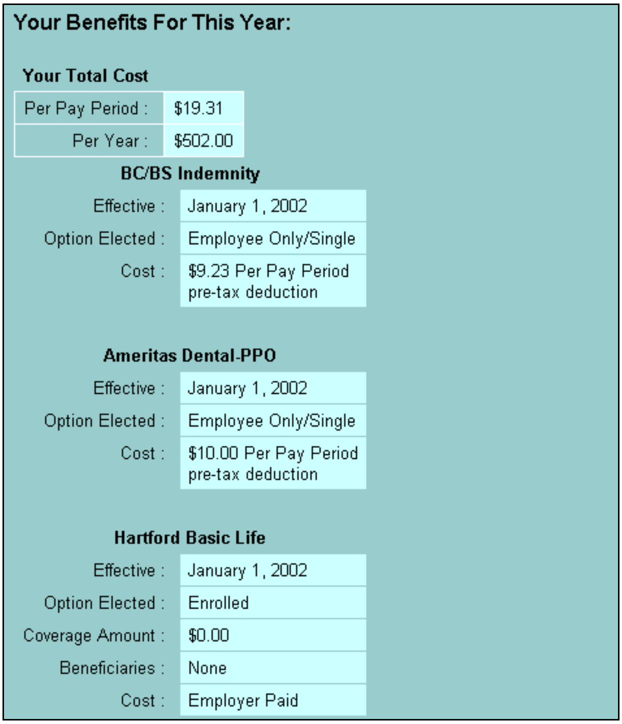
2. View your current benefit enrollments

Based on the benefits available at your organization, this page may display one or more of the following:

- Total cost of your benefits per pay period and per year
- Flex credits awarded and spent
- Welfare plan enrollments (including FSAs)
- Names of insured dependents
- Names of beneficiaries
- Coverage amounts for life insurance plans

For practice, click current benefit enrollments.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



Your Benefits For This Year:

Your Total Cost

Per Pay Period :	$19.31
Per Year :	$502.00

BC/BS Indemnity

Effective :	January 1, 2002
Option Elected :	Employee Only/Single
Cost :	$9.23 Per Pay Period pre-tax deduction

Ameritas Dental-PPO

Effective :	January 1, 2002
Option Elected :	Employee Only/Single
Cost :	$10.00 Per Pay Period pre-tax deduction

Hartford Basic Life

Effective :	January 1, 2002
Option Elected :	Enrolled
Coverage Amount :	$0.00
Beneficiaries :	None
Cost :	Employer Paid

3. Choose another function from the Navigator

After viewing your data, choose another function from the Navigator.

For practice, click Beneficiaries.

Viewing your next year's benefits enrollments

Using this page you can view your enrollments for the next plan year. This information appears only if you have completed making your benefit choices for the next plan year. If you have not yet enrolled in benefits for the next year, Interactive Benefits displays a message advising you that you have not completed your enrollments.

Note *This link appears only during the open enrollment period.*

1. Access the Next Year's Enrollments page

In the Employee area of the Navigator, click Benefits, then click Next Year's Enrollments.

Employee ▶ Benefits ▶ Next Year's Enrollments

For practice, access the Next Year's Enrollments page for user 4001.

2. View your next year's benefit enrollments

Based on the benefits available at your organization, this page may display one or more of the following:

- Total cost of your benefits per pay period and per year
- Flex credits awarded and spent
- Welfare plan enrollments (including FSAs)
- Names of insured dependents
- Names of beneficiaries
- Coverage amounts for welfare benefit plans

If you completed the Guided Practice, the resulting page should look similar to the example that follows:

Your Benefits For Next Year:

Your Total Cost

Per Pay Period :	$9.31
Per Year :	$242.00

BC/BS Indemnity

Effective :	January 1, 2002
Option Elected :	Employee Only/Single
Cost :	$9.23 Per Pay Period pre-tax deduction

Hartford Basic Life

Effective :	January 1, 2002
Option Elected :	Enrolled
Coverage Amount :	$0.00
Beneficiaries :	None
Cost :	Employer Paid

Medical FSA

Effective :	January 1, 2002
Option Elected :	Enrolled
Contribution :	$0.08 Per Pay Period pre-tax deduction

3. Choose another function from the Navigator

After viewing your data, click another function on the Navigator.

For practice, click Beneficiaries.

Adding a beneficiary or updating a beneficiary's details

Use this page to enter or update a Beneficiary's details.

- If you are adding an individual as a beneficiary (Add a new beneficiary), the fields on the page are blank. Complete the information on this page.
- If you are maintaining a beneficiary (click the name of the beneficiary), make any appropriate changes to the beneficiary's details.

To update your beneficiary information online follow these steps:

1. Access a Beneficiary's details page

You access a Beneficiary's details page by clicking Go to Details for a beneficiary on the Beneficiary summary page.

Employee ► Benefits ► Beneficiaries ► Beneficiary Details

If you are using this page to add a new beneficiary, the fields on this page are blank. For practice, access the Beneficiary Details page for user 4001 and click Go to Details for William Whitefield.

2. Add or update beneficiary information for an individual beneficiary

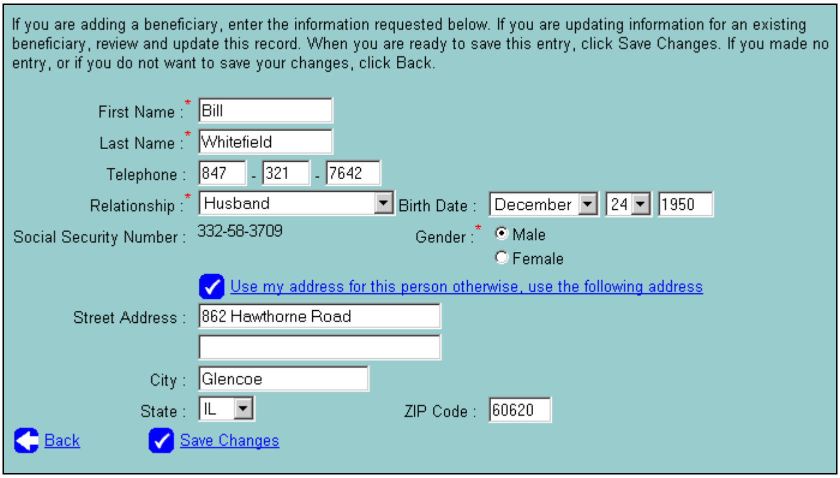
Enter or update information in all the appropriate fields. The chart that follows shows the name of the field in the left column and the information you enter in the right column.

Field/Box	Action/Entry
First Name, Last Name	Enter or update the first and last name of the beneficiary.
Telephone	Enter the area code followed by the phone number in the appropriate boxes.
Relationship	Use the down arrow to display a list of relationships. Click the appropriate relationship.
Birth Date	Use the down arrow to select the month and day. Enter the four digits of the year of birth in the last box in the format CCYY, e.g. 2000.
Social Security Number	Enter the first three digits of the family member's social security number in the first box, the next two digits in the second box, and the final four digits in the last social security number box. If the beneficiary does not have a social security number, leave this box blank. Note: to change a beneficiary's social security number, you must contact HR.
Gender	Click the radio button to select the gender for this family member.
Use my address for this person feature	If this beneficiary shares your address, click to have the system enter the address. Otherwise, enter the address information for the beneficiary.
Street Address	If the beneficiary has an address that differs from yours, enter the street address where the beneficiary resides.
City	If you entered a street address, enter the city where the beneficiary resides.

Field/Box	Action/Entry
State/Province	If you entered a street address, enter the state or province where beneficiary resides.
Zip Code/Postal Code	If you entered a street address, enter the zip code or postal code for this beneficiary.

For practice, change the first name from William to Bill.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. Save your entries

After you update or add the beneficiary information, click Save Changes. The system saves your information.

OR
Click Back

If you made no changes or you do not want to save your changes, click Back to return to the previous page.

For practice, click Save Changes.

See also:

- Beneficiaries ***(on page 9)***

For more information about selecting beneficiaries.

Adding or updating an institutional beneficiary

Use this page to enter or update information for an Institutional Beneficiary. If you are maintaining existing information, the fields on this page contain information for one of your institutional beneficiaries. If you are using this page to add a new institutional beneficiary, the fields on this page are blank.

1. Access the Institutional Beneficiaries page

Access the Institutional Beneficiary page. If you are adding an institutional beneficiary, click Add a new beneficiary on the Beneficiary page then click the Institutional Beneficiaries link on the Beneficiary Details page. If you are updating an institutional beneficiary, click Go to Details for the beneficiary whose information you want to update. The system displays the Institutional Beneficiaries page if the beneficiary is an institution.

Employee ► Benefits ► Beneficiaries ► Beneficiary Details ► Institutional Beneficiary

For practice, access the Institutional Beneficiaries details page for user 4001.

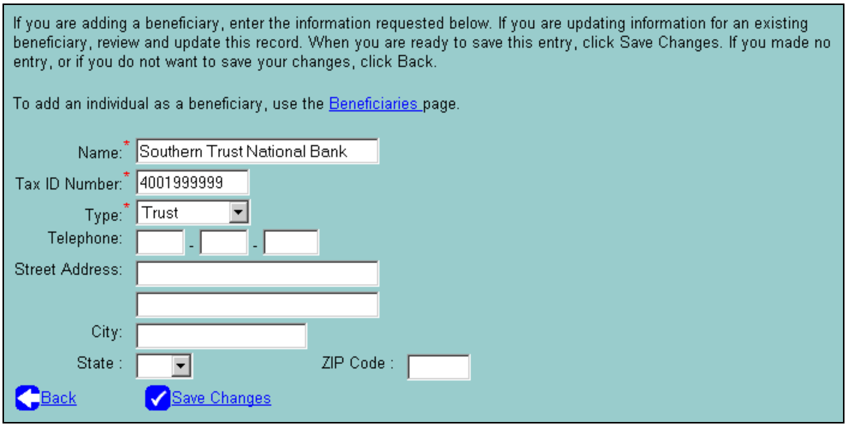
2. Add or update institutional beneficiary information

Enter or update information in all the appropriate fields. The chart that follows shows the name of the field in the left column and the information you enter in the right column.

Field/Box	**Action/Entry**
Name	Enter or update the name of the institutional beneficiary.
Tax ID Number	Enter the tax ID number for this beneficiary. Note: to change a beneficiary's Tax ID Number, you must contact HR.
Type	Click the down arrow to display the types of institutional beneficiaries. Select the appropriate type.
Telephone	Enter the area code followed by the phone number in the appropriate boxes.
Street Address	Enter the street address where the beneficiary is located.
City	If you entered a street address, enter the city where the beneficiary is located.
State/Province	If you entered a street address, enter the state or province where the beneficiary is located.
Zip Code/Postal Code	If you entered a street address, enter the zip code or postal code where the beneficiary is located.

For practice, enter the following on the Institutional Beneficiaries page: Name: Southern Trust National Bank; Tax ID: 4001999999; Type: Trust.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:



3. Save Changes

After you update or add the institutional beneficiary, click Save Changes. The system saves your information and returns you to the Beneficiaries summary page.

OR

Click Back

If you made no changes or you do not want to save your changes, click Back to return to the previous page.

For practice, click Save Changes.

See also:

- Beneficiaries ***(on page 9)***

For more information about selecting beneficiaries.

Changing beneficiary allocations

This page shows your total insurance benefit and its allocation among beneficiaries. Use this page to change the allocation of your benefit.

To change the percent of your benefit allocated to each of your beneficiaries follow these steps:

1. Access the Beneficiaries and Allocations page

You access the Beneficiaries and Allocations page by clicking Show me the allocation of benefits to my beneficiaries on the Beneficiaries page.

Employee ▶ Benefits ▶ Beneficiaries ▶ Change Beneficiaries and Allocations

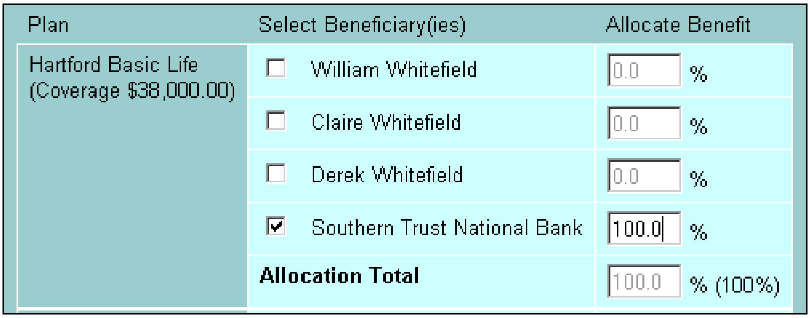
For practice, access the Changing Beneficiaries and Allocations page for user 4001.

2. **Change allocation of benefits.**

To change the allocation of a benefit, click the allocation percent and highlight the existing allocation. Enter the new allocation as a percent with one decimal place. For example, enter 50% as 50.0. Percent allocations must total 100.0 per cent.

For practice, allocate 100% of the Supplemental Life benefit to the Southern Trust National Bank.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Plan	Select Beneficiary(ies)	Allocate Benefit
Hartford Basic Life (Coverage $38,000.00)	William Whitefield	0.0 %
	Claire Whitefield	0.0 %
	Derek Whitefield	0.0 %
	Southern Trust National Bank	100.0 %
	Allocation Total	100.0 % (100%)

3. **Save Changes**

After you update your beneficiary allocations, click Save Changes. Interactive Workforce saves your information and returns you to the previous page.

OR

Click Back

If you made no changes or you do not want to save your changes, click Back to return to the previous page

For practice, click Save Changes.

See also:

- Selecting beneficiaries ***(see "Beneficiaries" on page 9)***

For more information about selecting beneficiaries.

Viewing your flexible spending account balances

This page displays your accounts, your annual contribution, and the current balance of each account (contributions to date minus processed claims) for the current plan year. If the deadline for submitting claims for the prior year has not been reached, the balances for that year also appear.

To view your flexible spending account balances follow these steps:

1. **Access the Flexible Spending Account Balances page**

On the Employee area of the Navigator click Benefits, then click Flexible Spending Accounts.

Employee ▶ Benefits ▶ Flexible Spending Accounts

For practice, access the Flexible Spending Account Balances page for user 6006.

If you completed the Guided Practice, the resulting page should look similar to the example that follows:

2. Select another function from the Navigator

After viewing your flexible spending account balances, select another function from the Navigator or Log Off the system..

For practice, click Benefits Enrollment.

See also:

- Understanding flexible spending accounts ***(on page 10)***

For more information about flexible spending accounts.

Review of Questions Answered

1. How can I view my current benefit enrollments?

2. How can I allocate different amounts to different beneficiaries?

3. What is a flexible spending account?

APPENDIX A

Review of Questions Answered

In This Appendix

About this appendix

This appendix provides answers for the Questions that appear in the Introduction to and at the end of instructional chapters.

Using the Benefits Functionality

1. How can I view my current benefit enrollments?
   From the Employee area of the Navigator select Benefits ► Current Enrollments.
2. How can I allocate different amounts to different beneficiaries?
   Access the Beneficiaries page, and click 'Show me the allocation of benefits to my beneficiaries' link.
3. What is a flexible spending account?
   Flexible spending accounts (FSAs) allow you to put a certain amount of pretax earnings into an account that has been set up for a specific purpose such as dependent care of medical bills not covered by insurance.

Enrolling in Benefits Online

1. What is the meaning of 'initial' enrollment in benefits?
   Initial enrollment is enrollment as a new employee enrolling for the first time in the organizations benefit plans. Initial enrollment is usually limited to a specific window of time.

3. How do you begin the open enrollment process?
   To begin the enrollment process read the information pages about enrollment that are available and then click Enroll in Benefits.

4. What page concludes your enrollment in benefits?
   You have completed enrollment when the Confirm Costs page displays and you select Finish.

Index

eCyborg

Interactive Workforce: Technical Implementation

1.1

Document Issue Status:	Second Release
Document Issue Level:	1.1
Document Issue Date:	August 2002
Software Version:	5.0

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Contents

PART 1

Introduction

In This Section

CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the technical implementation and administration of eCyborg Interactive Workforce.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by a number of different users. The following users will find it most useful:

- IT Specialists
  IT Specialists have a great deal of technical expertise through education and/or experience in the area of information technology. They are responsible for the installation, implementation, and customization of a system.

- Technical Administrator
  'Technical Administration' refers to the technical tasks required to support the ongoing usage of Interactive Workforce. These tasks include securing Interactive Workforce, updating the Interactive Workforce and Pay Information Databases, configuring environments, and applying Program Temporary Fixes (PTFs). Anyone responsible for these types of tasks at a site, regardless of title, should use this manual.

Prerequisite skills

Users of this manual should possess a variety of technical skills, depending on the roles they will play. At a minimum, all users should have:

- Thorough understanding of the control language for their environment
- Understanding of system backups and recovery
- Ability to create environments (for testing, production, and so forth)
- Authority to compile and link production program

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems to help you understand Interactive Workforce:

Documentation

Document	Description
eCyborg Interactive Workforce: The Administrator's Guide	Contains information on general use, implementation, and functional administration of Interactive Workforce.
Installing and Configuring Interactive Workforce	Contains information on installing Interactive Workforce

If you do not have these documents, you can obtain copies from your Cyborg client services representative.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introduction	1–2	Provides an overview of this manual, and another of Interactive Workforce.
2. Implementation	3-8	Provides concepts and detailed instructions for getting Interactive Workforce configured for your company's needs once it has been installed. Also provides concepts and detailed instructions for daily maintenance of Interactive Workforce, as well as information on further customizing the system to your company’s needs.
3. Appendices	A-F	Provides detailed reference information.

Following are descriptions of the chapters within the parts.

Introduction

The chapters in part 1 describe this manual and provide an overview of Interactive Workforce and the maintenance responsibilities.

Read this chapter		To learn about
1	About This Manual	How the manual is organized Where to find what you are looking for Who should use the manual Where to get help
2	Technical Overview	What is Interactive Workforce? Software Architecture About Maintenance

Implementing

The chapters in part 2 describe what you need to know to get the system running once it has been installed.

Read this chapter		To learn about
3	Configuring an Interactive Workforce environment	What has been installed? Post-installation considerations Utilities for configuration Setting up licensed users Connection Pooling The Split Point and the Session Counter
4	Web Implementation	Secure Socket Layer (SSL) Maintaining the Client computer Tailoring Information links Implementing Information Pages Implementing Navigator changes
5	Data Load of the Interactive Workforce Database	What is a data load? When is it done? The Interactive Workforce database What does it store? How is it updated? Listing Login IDs and Initial Passwords
6	Payroll Run Changes	SuspendStapi: pay merge and extract modifications Pay run and maintenance run modifications
7	Data Load of the Pay Information Database	The Pay Information database What does it store? How is it updated?
8	Basic Customizations	What are basic customizations? The ..\images directory Cascading Style Sheets Changing web text using resource files Adding hypertext links The Navigator Modifying extracts to change User Profiles

Appendices

The appendices contain the following quick references.

Read this chapter		To learn about
A	Data Tables and Dictionaries	The Interactive Workforce Database The Pay Information Database
B	Views	List of all default installation Views
C	Field Information Table	Lists data fields where an Interactive Workforce page pulls different fields from different Solution Series forms
D	Configuration Parameters	Lists different files and the parameters they contain which are used in configuring Interactive Workforce and its components
E	Error messages	List of technical Interactive Workforce-related error messages
F	Practice and Review Answers	Answers to the training questions at the end of each chapter

Identification of platform-specific information

This manual is designed to Cyborg software on Windows 2000, UNIX, OS/390, and AS/400 systems. Platform-specific information is indicated using tables in the following format:

Platform	Information
Windows 2000	NT/Windows 2000-specific information
UNIX	UNIX-specific information
OS/390	OS/390-specific information
AS/400	AS/400-specific information

CHAPTER 2

Technical Overview

In This Chapter

Technical Overview

This section is an overview of the software components of Interactive Workforce. The first part of this section describes the individual software components and the configuration of the physical servers where they reside. It also shows how data flows between Interactive Workforce, The Solution Series, and through to the end user. The second part describes the roles and responsibilities of the Technical Administrator.

Prerequisites

To best understand the material in this manual, you should be familiar with relational database, intranet, and file system concepts.

Questions answered

The following questions are answered in this section:

1. What is Interactive Workforce?
2. How does Interactive Workforce create web pages? How does it communicate with The Solution Series?
3. The architecture of Interactive Workforce—how do the components fit?
4. What are the responsibilities of the Technical Administrator?

What is eCyborg Interactive Workforce?

Interactive Workforce is part of eCyborg: the transformation of Human Resource Management (HRM) processes using Internet technologies. eCyborg is a collection of services delivered through Web technologies.

Interactive Workforce is a web-based software system which allows employees running a browser on a PC to access HR data in The Solution Series. Employees access Interactive Workforce at a desktop PC, or at a kiosk equipped with a PC, through the company intranet, where they can see and update their HR data stored in The Solution Series.

The Solution Series is Cyborg's 'best-in-class' human resource management system (HRMS), offering comprehensive human resource management, payroll processing, and time and attendance functionality.

What are the technical benefits?

Some of the technical benefits include:

- The Solution Series Employee Database (FILE02) updates take place immediately, with no batch processing necessary.
- Created using modern software technologies: Java, Java Server Pages, and XML.
- CORBA compliance: the STAPI conforms to CORBA standards set by the Object Management Group (OMG).
- Data integrity: data is validated before being sent to The Solution Series.

What is CORBA?

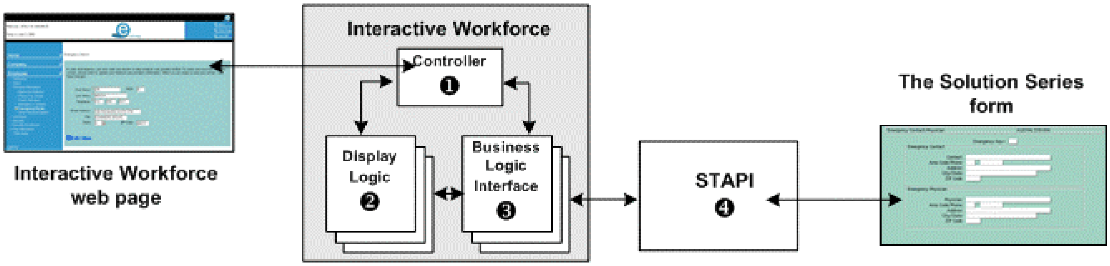
CORBA is a standard that allows distributed software programs or objects to communicate independent of their location on the network, implementation language, and platform. CORBA is defined by the Object Management Group, a consortium of companies working together to define standards in distributed systems.

How Does Interactive Workforce Work?

There are two fundamental concepts you should understand about how Interactive Workforce works—how data is exchanged with The Solution Series, and how the Interactive Workforce web pages are built.

How does Interactive Workforce connect with The Solution Series?

Interactive Workforce is a set of software components working to build web pages on the user end, and request information from The Solution Series databases on the other. How is data entered into an Interactive Workforce web page passed to The Solution Series, and how is the information returned? The following illustration shows the components comprising the core of the system, and the general flow of information between:



1. The Controller takes the user request from the web browser via the web application server, and maps the request to the proper Display and Business Logic.
2. The Display Logic (JSPs) defines the look of the web page to the web browser.
3. The Business Logic Interface (JavaBeans) defines the logic behind the web page, and exchanges information with the STAPI.
4. The STAPI exchanges information between the Business Logic Interface and The Solution Series.

The core of Interactive Workforce consists of the Controller, Display Logic, and Business Logic Interface. These software components are all Internet-based software technologies which create the web end of the system. They tell the browser how to build the web pages, and query the STAPI with user requests.

The connection between The Solution Series and Interactive Workforce is the STAPI. This is an Application Programming Interface developed by Cyborg. It receives employee requests from Interactive Workforce, processes those requests through The Solution Series, then returns the response to the Business Logic, and on to the browser.

The following table shows code samples of the code used to create the Emergency Doctor web page, as shown in the illustration on this page.

1. Controller Map. Scripted in XML Talks to the Intranet. Coordinates all related JSPs and the JavaBean.	<?xml version="1.0"?> <!DOCTYPE map SYSTEM "cyborg-process-map.dtd"> <map name='EmergencyDoctor' start='Edit' description='Emergency Doctor' urlPrefix='Worklife/UpdatePersonalProfile/UpdateEmergencyDoctor/' errorPageUrl="/Main/DataAccessErrorPage.jsp"> <step-node name='Edit' program='EmergencyDoctorEdit.jsp'> <entry-action-sequence> <instantiate-bean-action scope='session' name='emergencyDoctorBean'
2. Display logic. Scripted in HTML and Java. JSPs define pages. Refer to JavaBean. Use Resource file for text.	<jsp:useBean id="emergencyDoctorBean" class="com.cyborg.selfservice.beans.EmergencyDoctorBean" scope="ESS ion"/> <html> <head> <title><%=i18n.getString("UpdateEmergencyDoctorTitle")%></title>

3. Business logic.
Coded in JavaBeans.
Performs the transactions behind the page.
Refers to STAPI keys and field definitions.
	// STAPI setup
	CybConstraintSet cs = createWriteConstraintSet(ST_VIEWNAME);
	CybConstraintSet cs2 = createWriteConstraintSet(ST_VIEWNAME2);
	CybRecordSet in = createRecordSet();
	CybRecordSet in2 = createRecordSet();
	CybRequest cr = createRequest();
	CybRequest cr2 = createRequest();
	try
	{
	in2.addField(0, "EMERGENCY-KEY", "001"); // always 001
	in2.addField(0, stZipPostalCodeField(), "00000");

4. STAPI Uses Views to map to Solution Series. Transacts the request and retrieves the response from Solution Series.	View=Emergency Physician Parent=16-SCR Remove=FALSE Query=TRUE Insert=TRUE Update=TRUE AccessPanel=FALSE Field=EMERGENCY-KEY Field=EMERGENCY-PHYSICIAN

Interactive Workforce access to The Solution Series

Interactive Workforce uses the API1 user in connecting to The Solution Series. Any changes made via the STAPI can be seen on the The Solution Series session log as sessions by user API1.

If not secured, the API1 login can be a potential leak through which unauthorized users can access the system. Anyone who logs on to The Solution Series directly as the API1 user has access to every piece of employee data that is stored in The Solution Series. By changing the API1 password from the default to a private password known only by the Technical Administrator and backup(s), you can effectively secure this potential problem.

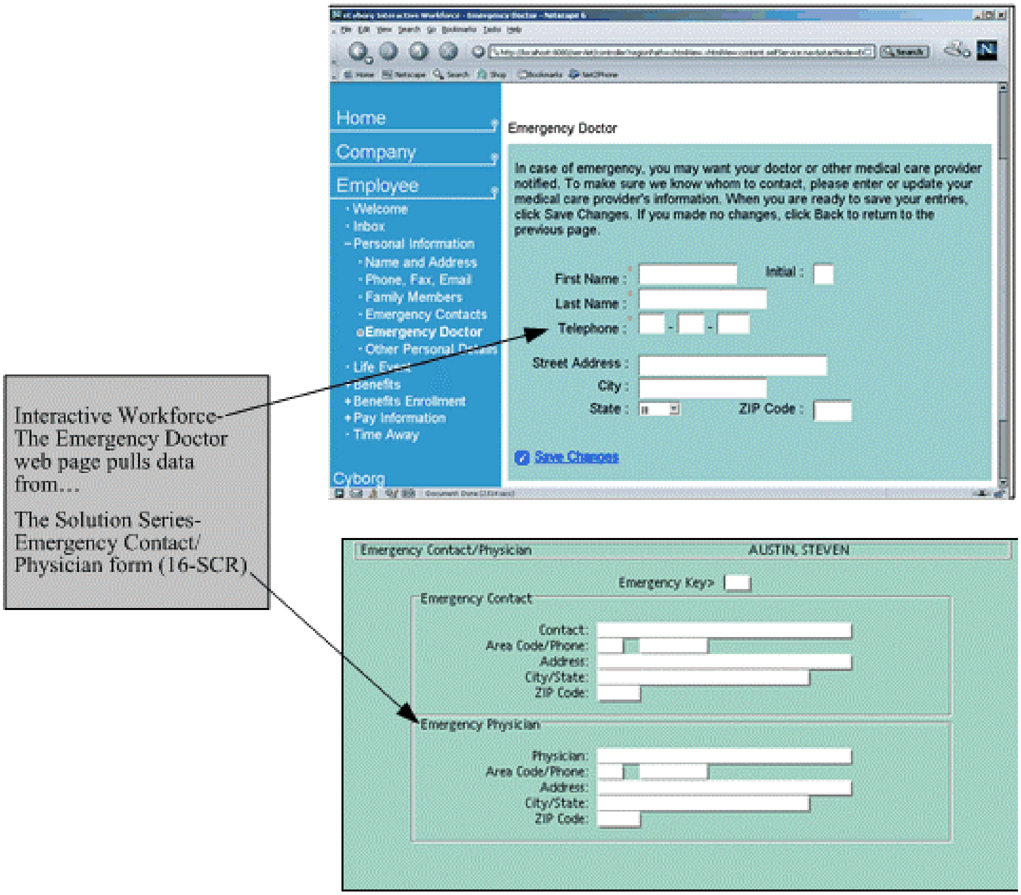
The API1 user password must be changed in two places:

- The Solution Series
- The Interactive Workforce configuration utility

Important! It is imperative that you change the password for the API1 user in order to prevent unauthorized access to employee data—at the very least upon initial installation.

How is data mapped between Interactive Workforce and The Solution Series?

To demonstrate the relationship between an Interactive Workforce web page and and The Solution Series form, the illustration here displays the Emergency Doctor page in Interactive Workforce on top, and its data source from The Solution Series below: the Emergency Contact/Physician form (16-SCR).



Here, you can see that the name and address of the physician are taken directly from The Solution Series, but how is that information mapped into Interactive Workforce web pages? Information is mapped between the two using Views.

Views

Essentially, a View is a set of data fields used by the STAPI to map information between Interactive Workforce and The Solution Series. Every data field to be extracted from The Solution Series and displayed on an Interactive Workforce page must be included in a View definition.

A standard set of Views is delivered in the STAPI configuration file (STAPI.cfg). Each View definition lists the following:

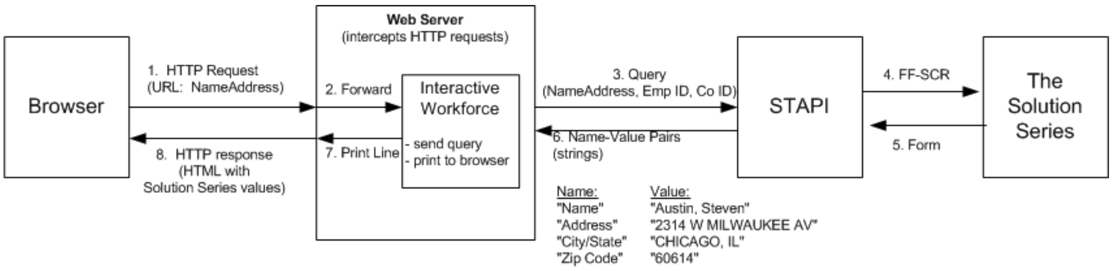
- **View** is the name of the view.
- **Parent** is The Solution Series form from which the data is retrieved.
- **Remove, Query, Insert, and Update** define read/write access.
- **Field** maps to The Solution Series.

Here is the View for the Emergency Doctor page, which is used to map the data between the Emergency Doctor page in Interactive Workforce and the Emergency Contact/Physician (16-SCR) form in The Solution Series:

```
.
View=Emergency Physician
Parent=16-SCR
Remove=FALSE
Query=TRUE
Insert=TRUE
Update=TRUE
AccessPanel=FALSE
Field=EMERGENCY-KEY
Field=EMERGENCY-PHYSICIAN
Field=PHYSICIAN-AREA-CODE
Field=PHYSICIAN-PHONE-NBR
Field=PHYSICIAN-ADDRESS-1
Field=PHYSICIAN-CITY-ST
Field=PHYSICIAN-ZIP-CODE
Field=PHYSICIAN-CITY-PROV
Field=PHYSICIAN-POSTAL-CDE
.
```

Transaction flow

When a user connects with The Solution Series to view or change their HR data, the information flows through Interactive Workforce in a specific series of steps. This chart demonstrates the flow once a user connects and makes a request to see their Name and Address information:



1. **HTTP Request—**When a user types an address into their browser, a request looking for that address goes to the web application server. The address is called a Uniform Resource Locator (URL).
2. **Forward—**A software module residing in the web application server looks at the URL in the request for the string servlet, which directs the request to the servlet manager. The rest of the URL directs the servlet manager to the Controller, which maps the request to the NameAndAddress JavaBean.
3. **Query—**The NameAndAddress JavaBean contains business logic that sends a query to the STAPI. The query specifies the name of the view (NameAndAddress), the employee ID, and the company ID.
4. **FF-SCR—**The STAPI translates the information sent with the query to The Solution Series commands. In this case. It would put the company ID in the Ctrl 1-2 field, the employee ID in the key field, and the FF-SCR in the screen field.
5. **Form**—The Solution Series responds with the properly formatted form.
6. **Name-Value Pairs—**The STAPI interprets the screen from The Solution Series and formats the information as a set of string pairs: one contains the field name, the other contains the field value.
7. **Print Line—**When NameAndAddress process receives the response from the STAPI as Name-Value Pairs. It can then generate HTML by sending print lines to the output stream which contain the desired HTML to display in the browser.
8. **HTTP Response—**The Print Lines generated by the NameAndAddress process are sent to the browser via HTTP protocol.

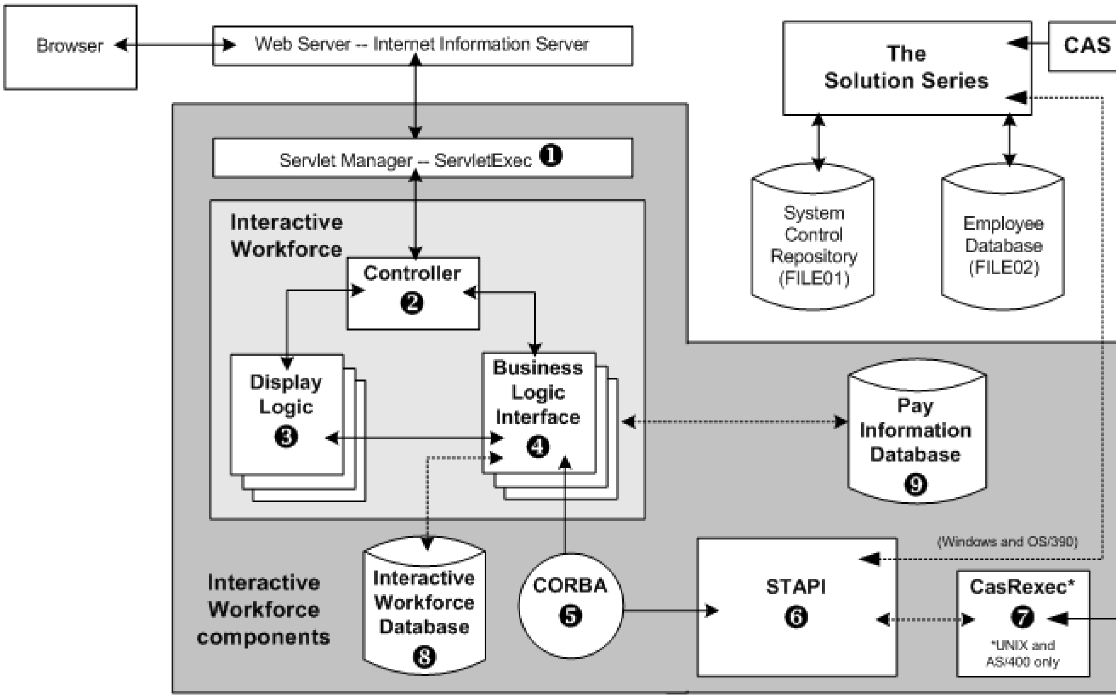
System Architecture

This section describes the software architecture of the system.

The Application Picture

The following illustration shows the computers involved, where each software component fits in a typical installation of Interactive Workforce, and the basic information flow.

The numbered components are further explained on the following pages.



Component Key

Following is a list of descriptions of the components in The Application Picture:

1. ServletExec

Interactive Workforce utilizes ServletExec as a servlet manager. Designed using Sun Microsystem's JavaServer Pages (JSP) standards, it acts as an interface for the Controller. It receives requests from the Web Application Server, then forwards these requests to the proper JSPs in the Display Logic by going through the Controller. It translates the Display Logic and Business Logic into web pages for the web server to send to the browser.

Important! For security reasons, it is highly recommended that you change the ServletExec Invalidation Time to close dormant sessions.

☞ *Refer to* **Setting the ServletExec Invalidation Time** *for more information.*

2. Controller

The Controller communicates directly with the web software—it is the point of entry into Interactive Workforce. It takes requests that come over the network, then acts as a conduit, forwarding those requests to either the Display Logic or the Business Logic Interface. Once the response has been returned, it sends information back through the network. The Controller performs this function by coordinating the routing of pages based on user navigation.

It uses the Controller Process Maps in order to find the correct logic. Each Process Map is an XML file which contains tags that describe the information the Controller needs to route pages and direct the flow of information.

2. Display Logic

The Display Logic is made up of Java Server Pages (JSPs) which contain the scripts for translating the information into the format needed for the browser. The JSPs are written in HTML and Javascript. The Display Logic captures the requests and sends it to the Business Logic Interface. There may be multiple JSPs in the Display Logic for any given JavaBean in the Business Logic Interface.

3. Business Logic Interface

The Business Logic Interface is comprised of JavaBeans stored in JAR files. They process and forwards requests to the STAPI. It is also used to verify user access.

4. CORBA

Interactive Workforce uses a CORBA-based middleware solution which allows the Business Logic Interface and the STAPI to exchange data. The CORBA implementation varies according to platform.

5. STAPI

The STAPI is an Application Programming Interface which uses the CORBA implementation to communicate with the Business Logic Interface. This is the component which communicates directly with The Solution Series. When it first starts up, it creates a Connection Pool, through which it talks with The Solution Series.

The Interactive Workforce Business Logic component creates a request for STAPI based on a View. STAPI takes the request converts it to a Solution Series command and receives the results. STAPI then converts the results to name-value pairs which are returned to the Interactive Workforce Business Logic.

This is where the name-value pairs are formed—the STAPI looks at the request coming from the Business Logic Interface, then maps it to the corresponding field in The Solution Series. It maps data between Interactive Workforce and The Solution Series using Views. The Views are defined in the STAPI configuration file.

7. CasRexec (UNIX and AS/400 only)

In UNIX and AS/400 implementations, the STAPI uses the CasRexec to access The Solution Series remotely via the Cyborg Application Service (CAS). The CasRexec utilizes TCP/IP protocol, and consists of two executables:

- **crxcbsvo.bat—**This utility allows remote execution of CBSVO.
- **crxcybio.bat—**This utility allows remote execution of CYBIO.

In multiple environments, each environment has it's own copy of each of these utilities.

8. The Interactive Workforce database

Because it is closely tied with the web components, the Interactive Workforce database resides on the Web Application Server. This database contains the user profiles, which are used for determining access. The Interactive Workforce database is populated and updated by extracting information from The Solution Series. This extract must be performed when this system is first installed. As employees join and leave a company, this extract must be performed on a regular basis in order to stay current with the Employee database (FILE02).

This reduces the overall amount of network traffic by caching commonly accessed data to lower the number of requests to the Employee database. It also sets up employees within The Solution Series to access Interactive Workforce functionality without being setup as Solution Series users.Option lists, Administration data (HR, Payroll, and Benefits), and business rules information are also stored in the Interactive Workforce database.

9. The Pay Information database

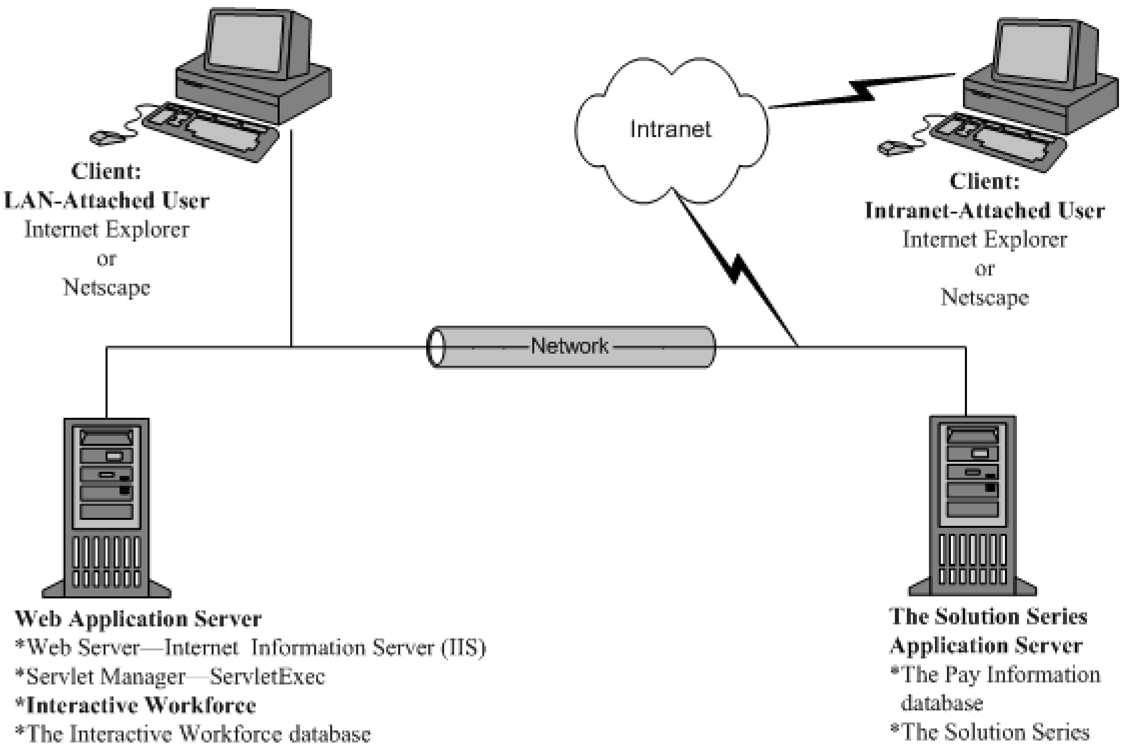
Interactive Workforce has pay history functionality in addition to that available in The Solution Series. Because some of these features are exclusive to Interactive Workforce, it uses the Pay Information database to store the data. The Pay Information database feeds the Pay Information History web pages, allowing users to view their payments over past pay periods. This information is extracted from The Solution Series using the user's organization and employee numbers. This database must be updated after every payroll run. The Pay Information Database resides on the The Solution Series Application Server.

Because it is closely tied with the payroll run, the Pay Information database resides on The Solution Series Application Server.

The Hardware Picture

In a typical installation of Interactive Workforce, we recommend that the intranet-related software and application-related software be split onto separate computers: the Web Application Server and The Solution Series Application Server.

The illustration below shows which computers the software components reside on in a typical installation.



Apply the Concept

List the software components of Interactive Workforce, and the computer on which each component resides in a two-server configuration.

The Client

The Client computer is one on which the employee logs in to Interactive Workforce. It may be a dedicated machine at a kiosk accessible to employees, or it may be one of many computers at employees' desks. Since this system utilizes the intranet, any machine connected to the company intranet is a potential client.

The client machine must have a browser installed—either Internet Explorer or Netscape. The browser is used for connecting to the intranet. Adobe Acrobat must also be installed, in order to use the tax forms available through the system.

When the client is in a kiosk, it is recommended running the client in Kiosk mode to create a more secure system.

The Web Application Server

This computer is the entry-point into Interactive Workforce. It controls user access, coordinates user requests, creates the web pages, and stores security information for user access and system administration data.

The Web Application Server is the computer on which all of Interactive Workforce's intranet-related software is installed: the Controller, the Display Logic, and the Business Logic Interface Log. The Interactive Workforce Database is also located on this machine, which requires database application server software.

This machine has the software to coordinate between intranet connections and Interactive Workforce: the web application server software and the servlet manager. The web application server software (Internet Information Server, also IIS) handles incoming requests from the intranet and forwards them to the servlet manager. The servlet manager (ServletExec) checks to see which application the request is looking for—in this case, the Controller of Interactive Workforce.

The Solution Series Application Server

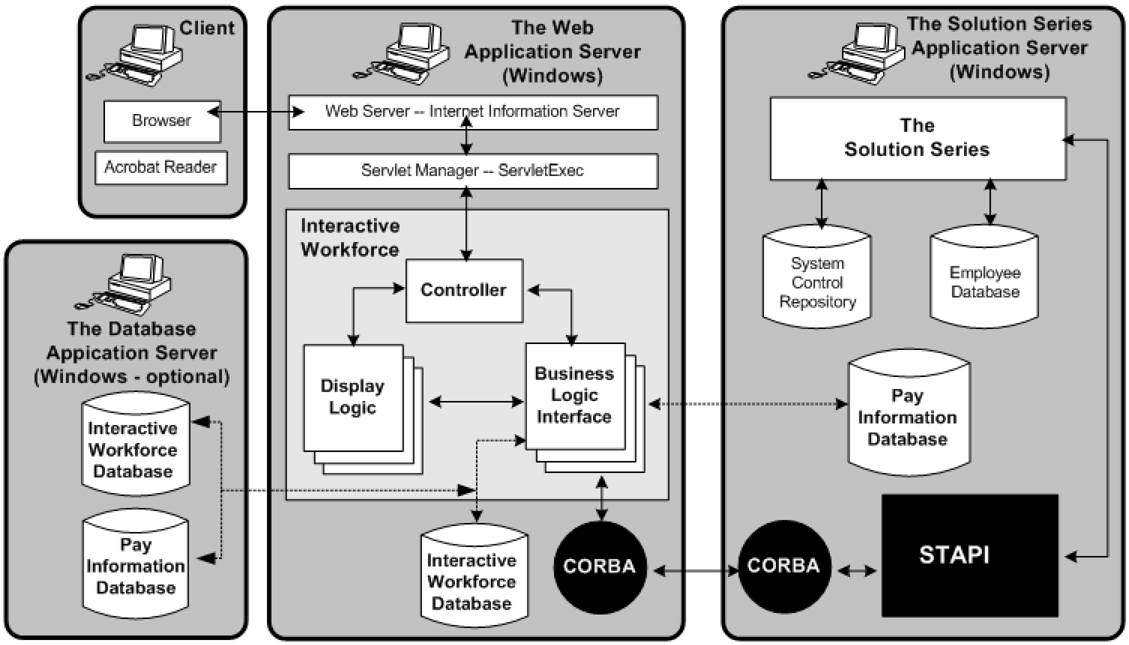
This computer is the backbone of the system—it is where the bulk of the HR information is processed and stored. The Solution Series is the core of this machine, and handles all the back-end processing. The Pay Information Database is also installed on this machine, which requires database application server software.

Interactive Workforce Architecture on Different Platforms

The basic architecture of Interactive Workforce will vary slightly from platform to platform, but the functionality is the same. However, in all installations, the Web Application Server will always be on a machine running Windows.

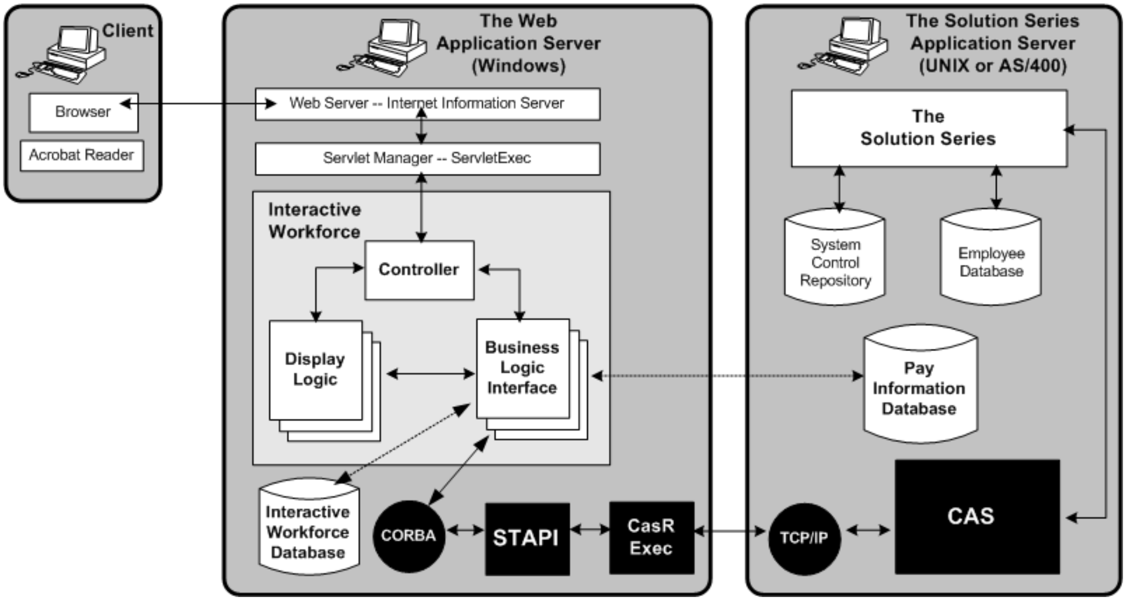
Windows systems

On Windows systems, the STAPI resides on The Solution Series Application Server. The STAPI communicates with the Business Logic Interface via CORBA, which is comprised of Iona's Orbix ORB on the Web Application Server and OrbixWeb on The Solution Series Application Server. In Windows systems, there is also an option for placing the databases on a dedicated server.



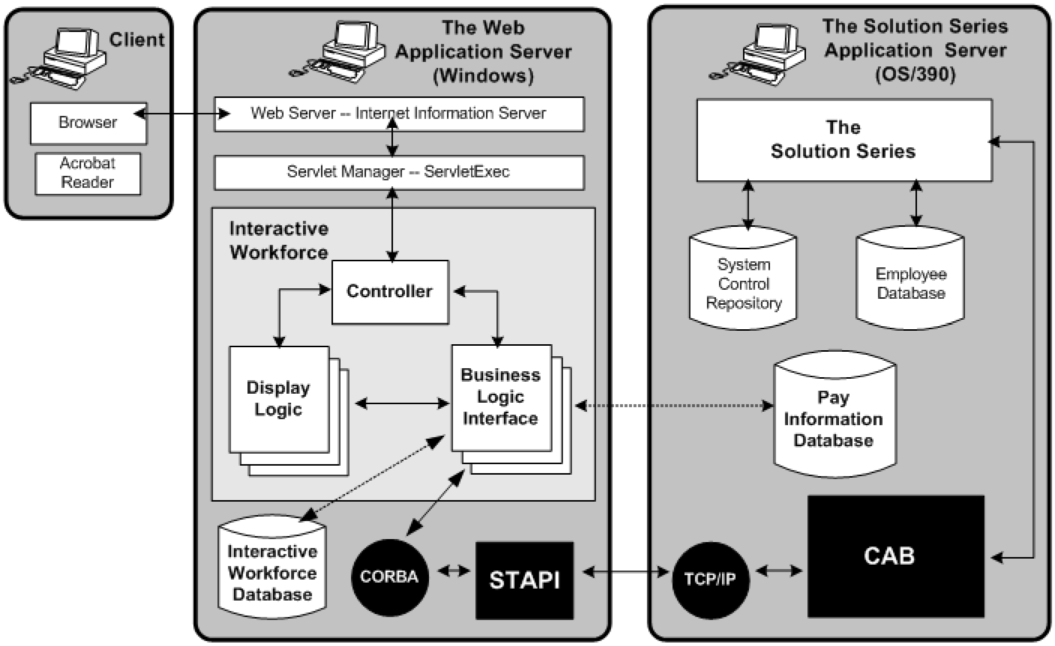
UNIX and AS/400 systems

The UNIX and AS/400 implementations utilize CORBA to communicate with the STAPI, which is located on the Web Application Server. On these platforms, the STAPI has remote access to CAS via CasRexec, which allows the two to communicate using TCP/IP. CasRExec resides on the Web Application Server.



OS/390 systems

In OS/390 installations, the STAPI resides on the Web Application Server, and communicates with The Solution Series through the Cyborg Application Broker (CAB) using TCP/IP.



Overview of Interactive Workforce Maintenance

Once Interactive Workforce is up and running, there is minimal maintenance involved with the system. Of the maintenance issues that exist, the Technical Administrator is responsible for the following:

System configuration

System defaults must be considered and set up as part of the implementation process, and maintained as the system grows. Some of the configuration options you will need to consider include session timeouts and split points.

Most of the configuration is done during installation. However, you may need to reconfigure some parameters, such as those in the Connection Pool, as your company, and system requirements, grows.

☞ *Refer to* **Configuring an Interactive Workforce Environment** *(on page 31) for more information.*

Database maintenance

The Interactive Workforce and Pay Information databases must be updated periodically. The Interactive Workforce database must be updated in order to include new employees entered in The Solution Series to keep the two databases synchronous. The Pay Information database must be updated with every payroll run.

Both databases must also be backed up on a regular schedule. Your company should already have policies and procedures in place for scheduling and performing database backups. Please coordinate with your company's Database Administrator to ensure that the Interactive Workforce and Pay Information databases are backed up on a regular basis.

☞ *Refer to* **Maintaining the Interactive Workforce Database** *(see "Data Load of the Interactive Workforce Database" on page 105) and* **Maintaining the Pay Information Database** *(see "Data Load of the Pay Information Database" on page 145) for more information.*

General maintenance

Interactive Workforce provides utilities for general maintenance, including backup facilities and the STAPI suspend utility. There are also logging utilities for tracking system operations.

☞ *Refer to* **Configuring an Interactive Workforce Environment** *(on page 31),* **Web Implementation** *(on page 75),* **Maintaining the Interactive Workforce Database** *(see "Data Load of the Interactive Workforce Database" on page 105), and* **Maintaining the Pay Information Database** *(see "Data Load of the Pay Information Database" on page 145) for more information.*

Post-installation issues

You will need to address the following issues soon after the installation has been completed:

- System-wide defaults
- Configuration options
- Backups
- Change control procedures
- Modification of job streams

System-wide defaults

As you prepare to set up your environment(s), you should consider the system-wide default options that you may need to establish. Subsequent sections in this guide will help you to configure these defaults.

☞ *Refer to Configuring an Interactive Workforce Environment for more information.*

Applying PTFs

Remember to check the Cyborg Bulletin Board System (CUBBS) on a regular basis to receive the latest Program Temporary Fixes (PTFs) for your system. The changes must be downloaded from CUBBS and applied according to the directions provided with each PTF. You should maintain a running list of PTFs that have been applied to your system as you add each update. In general, you should apply PTFs to a test environment prior to a production environment in order to ensure that it works properly in your system.

PTFs will overwrite any customizations made to the system, so you should back up any customized files, then reapply the customizations to updated files once a PTF has been applied. If the number of customizations to your system is small, then this may be done manually. However, as the number and complexity of modifications increases, you may wish to use professional merging tools to reapply modifications to updated files.

You should follow these general procedures in applying PTFs:

1. Create a test environment that mirrors the production environment.
2. Back up the environment, as you may need to restore if it becomes corrupted in an unsuccessful installation attempt.
3. If not already applied, install all PTFs up to the one with the desired fix.
4. Apply the desired PTF to the system.
   a. Shut down the environment.
   b. Unzip the PTF.
5. c. Follow the install instructions bundled with the PTF.
6. Re-apply customizations.
   a. Compare the original, upgraded, and customized versions of the file.
   b. Create a destination file to hold the results of the file merge.
   c. For each section that is unchanged in all three files, copy that section into the destination file.
   d. If the differences *do not conflict* (one change does not affect another), copy the differences into the destination file.
   e. If the differences *do conflict*, resolve the problem by producing new code that honors the intent of the customization and the upgrade.
   f. Replace the original file with the upgrade file to establish a new baseline, and replace the customized file with the destination file.
7. Restart the environment.
8. Verify proper system operation.

9. Back up the production environment, ensuring that customizations are saved.
10. Apply the PTF to the production environment.
11. Re-apply customizations.
12. Restart and verify the environment.

The importance of recording your system changes

Record keeping or logging of all enhancements to your original system on a regular basis is very important. By keeping these records using a consistent method, you create an audit trail that can then be reconstructed and applied, or when you receive upgrades to the software.

Modification of model job streams

In integrating Interactive Workforce with The Solution Series, the payroll run jobs in The Solution Series have been modified to work with Interactive Workforce. These jobs can be used for performing the payroll run. However, if your system has had modifications made to those jobs, then you will need to add Interactive Workforce-specific code to those scripts in order to the systems to be fully integrated.

☞ *Refer to Payroll Run Change for more information.*

PART 2

Implementation

In This Section

CHAPTER 3

Configuring an Interactive Workforce Environment

In This Chapter

Configuring an Interactive Workforce Environment

This section discusses the configurations you will need to make in order to scale an environment of eCyborg Interactive Workforce to handle the number of estimated users at your company. Configurations are made in the STAPI configuration file and the Interactive Workforce properties file. Interactive Workforce is installed with default settings, and most of the parameters do not require reconfiguring.

Although there are default settings for each parameter, there are a number of parameters based on your company size which you may need to reconfigure. This section highlights these parameters, and offers information to help you determine their settings based on your company size. These must be made separately for each environment. This section will explain how the environments have been set up, and how you need to configure them.

Tasks

This section explains the following:

- Running the System Down
- Shutting down Interactive Workforce
- Configuring the STAPI
- Configuring database connections for Interactive Workforce
- Configuring the Split Point
- Reconfiguring the STAPI
- Starting Interactive Workforce

Questions answered

The following questions are answered in this section:

1. What has been installed? What are the post-installation issues?
2. What are the licensing requirements?
3. How is the maximum number of concurrent users determined?
4. What are the Connection Pools, and how do they work?
5. What is the Split Point, and where is it configured?

What is an Interactive Workforce environment?

Each Interactive Workforce environment is basically a self-contained Interactive Workforce system, with its own programs and files.

How many environments

As Interactive Workforce goes through the implementation process, three environments may be installed:

- Initial installation (Vanilla)
- Test
- Production

The first installation is the initial installation (Vanilla) environment, which provides verification of a full Interactive Workforce system. It is strongly recommended that the Vanilla environment be maintained to provide a base on which to install and verify later software releases. The Vanilla environment also provides a source from which the Test and Production environments are created, depending on how you implement Multiple Environments.

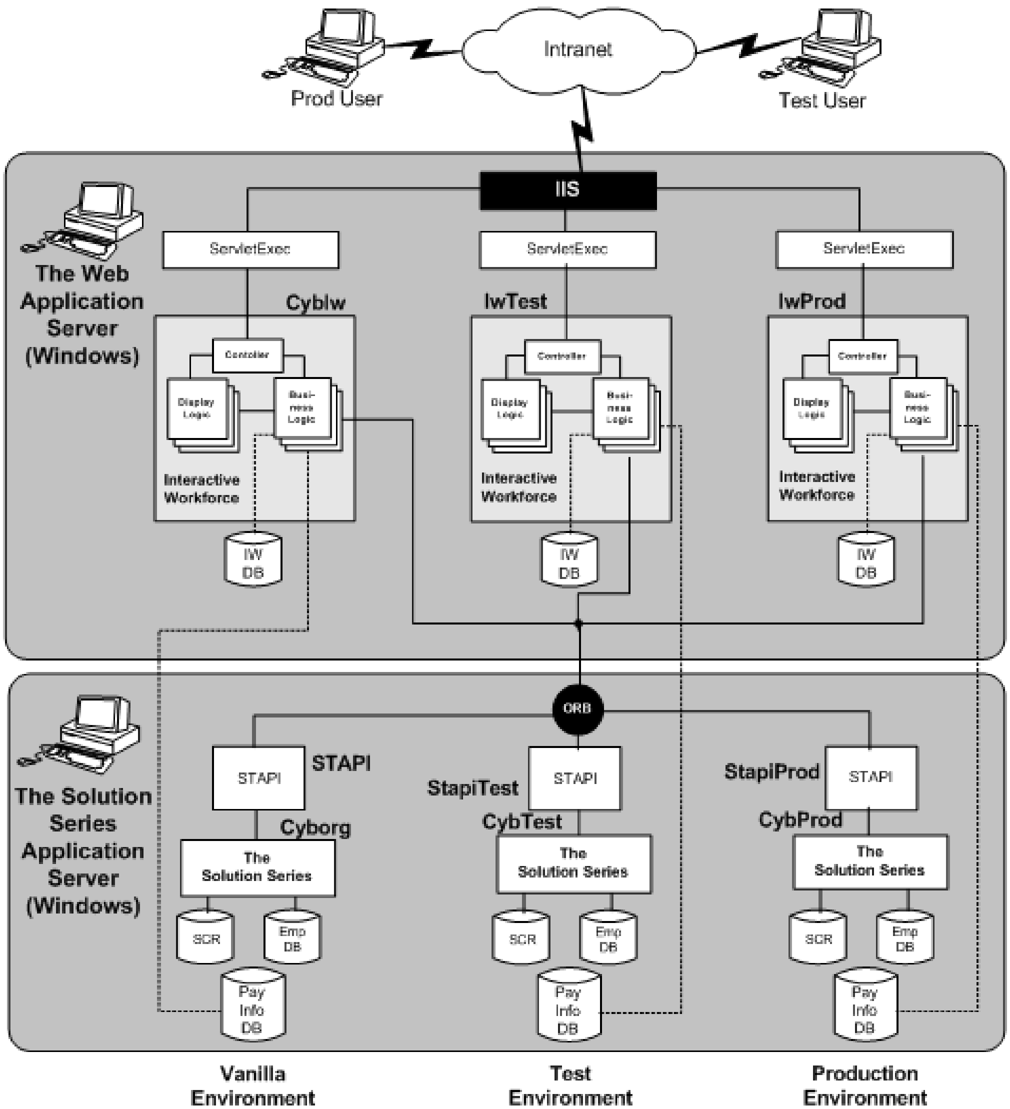
The Test environment is used during the implementation phase to thoroughly test an installation using a control group of test users. It is used also for testing modifications made to Interactive Workforce in order to fully integrate it with any customizations that may have been made to your implementation of The Solution Series.

Once the install has been verified in the Test environment, then the Production environment should be created based on the successful implementation of the Test environment. This is the final system where employees in the company will have full use of Interactive Workforce.

Multiple environments

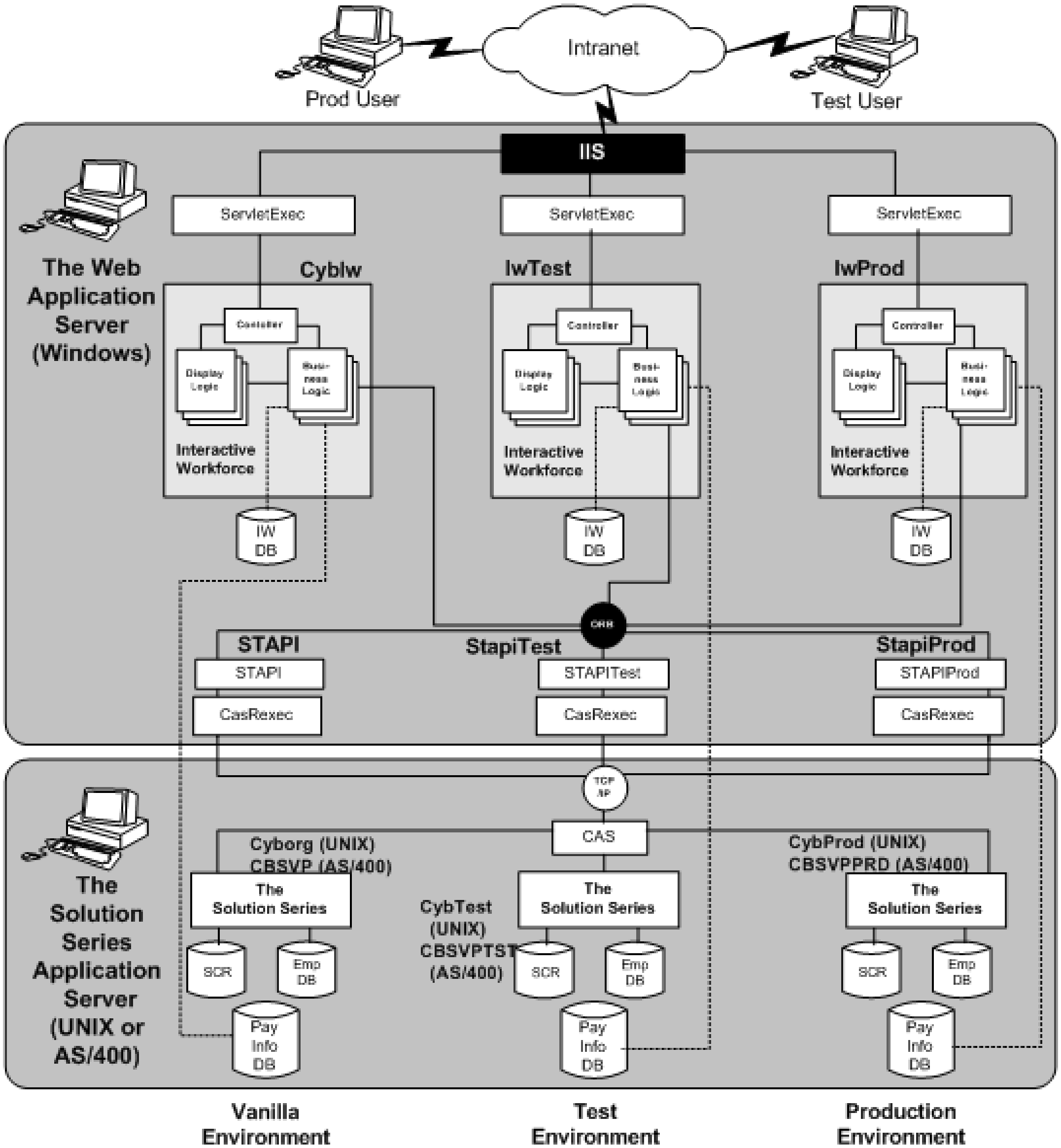
Windows

The illustration here illustrates how Multiple Environments would look in a Windows implementation. The environments share a common CORBA. Each environment requires specific names for some components.



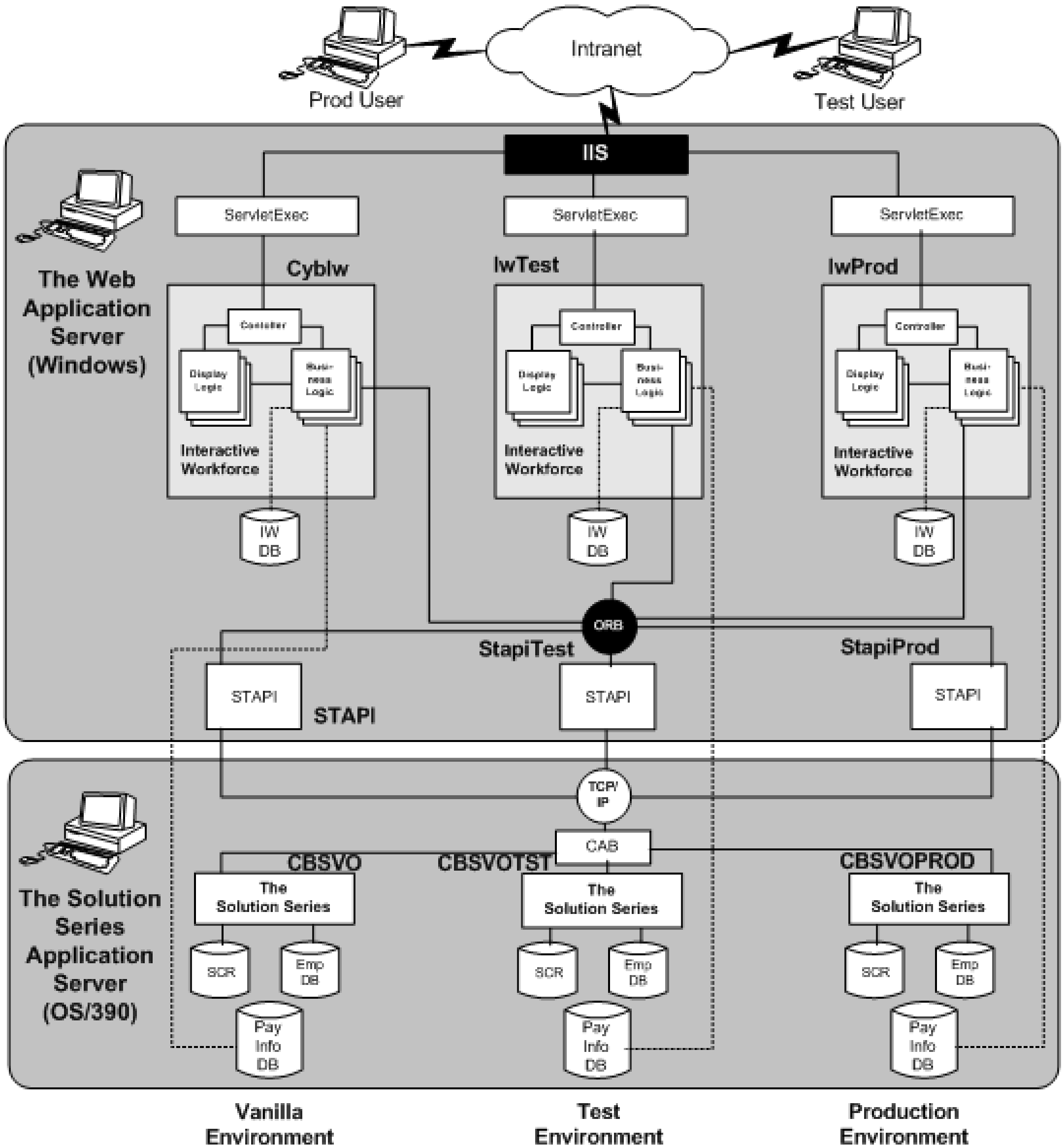
UNIX and AS/400

The following illustration shows how Multiple Environments would look in a UNIX or AS/400 implementation. The Web Application Server is run on a Windows machine, and each environment has a separate CasRexec speaking to the CAS via TCP/IP.



OS/390

The illustration here illustrates how Multiple Environments would look in an OS/390 implementation. The environments share a common CORBA and CAB, but require environment-specific names for other software components.



Estimating employee access for licensing and configuration issues

When you configure Interactive Workforce, you need to consider the number of employees likely to be using the system simultaneously. For each user accessing Interactive Workforce, there are configuration and licensing considerations. Calculating the number of connections for an implementation is not an exact science—it is a matter of looking at the company size and estimating the number of concurrent users during times of average and peak use, then basing configurations on those numbers to estimate minimum and maximum use, allowing for standard or optimized database response time.

In configuring the number of connections, you estimate the number of potential concurrent users. By 'concurrent', we mean users that are submitting requests simultaneously. Though a user may be logged in, processing resources do not get used until the user submits a request. The more users requests, the more connections used.

You will also want to consider the average number of users versus the maximum number of users. The average is the estimated number of users during typical use, and should determine minimums. The peak is number of estimated users during highest use, as during Open Enrollment, and should determine maximums.

For example, Acme Insurance is a company of 10,000 employees. About 50% of those employees (5,000) have PCs at their desks. At peak usage, the number of people using Interactive Workforce might be 10%—about 500 users logged on. The number of users who actually submit a request at the same time is 1 out of 50—hence, there may be only 10 maximum concurrent users at peak use. However, they may require enough connections to account for 3 minimum concurrent users during times of average use.

☞ *Refer to the table following for information on estimating employee access and configuration/licensing numbers.*

The bulk of connections will be utilized when a user logs in. A user may take up to 7 CYBIO (FILE01), 7 CBSVO (FILE02), and 7 Interactive Workforce database connections during the log in. If you want to minimize Interactive Workforce response time, then allow for 7 CYBIO, 7 CBSVO, and 7 Interactive Workforce database connections per user.

However, you may not wish to tie up quite so many resources, in which case you can configure for more standard use. Once a user is logged in, the number of connections will not exceed 3 CYBIO, 3 CBSVO, and 3 Interactive Workforce database connections per request. So, you would allow for 3 CYBIO, 3 CBSVO, and 3 Interactive Workforce database connections per user—then add standard as many more as you need to cover log ins. This may result in slower response times, but frees up the database application server processing for other applications.

One last thing to consider is PC access. For example, a factory offering Interactive Workforce access through 2 or 3 kiosks in the cafeteria will not require as many connections as a software company, where every employee might have a desktop PC.

Once you have estimated the number of users during average and peak times, use the calculations in the following table to determine the configurations:

Parameter	**Standard**	**Optimum**	**Acme Insurance Example (standard)**
Thread Pool Size	Max CYBIO + Max CBSVO		3 average, 10 peak
Minimum CYBIO (FILE01) Connections	3 X average	7 X average	15*
Maximum CYBIO Connections	3 X peak	7 X peak	50*
Minimum CBSVO (FILE02) Connections	3 X average	7 X average	15*
Maximum CBSVO Connections	3 X peak	7 X peak	49*
Pay Info DB Connections	1 X peak	1 X peak	10
Interactive Workforce DB Connections	4 X peak	7 X peak	40
Split Point	Max CYBIO + Max CBSVO		50**

*Taking into account worst case connections, and allowing extra connections for log ins.
**Default setting for Split Point allows connections for up to 50 /ST Sessions.

Important! If users are receiving timeout errors, database connections may be set too low. There are two potential fixes:

1. Increase the number of database connections to handle more users.
2. Increase the timeout to allow enough time for connections to free up.

Apply the Concept

After considering the size of your company, what is the number of maximum concurrent users you expect?

Licensing Requirements

Which configurations are tied to licensing?

Depending on the size of your company, Interactive Workforce requires several parameters to be licensed and configured based on the estimate system use:

- the STAPI connection pools
- the Interactive Workforce database connections
- the Pay Information database connections

These components must be licensed and configured to handle the volume of use you expect for the number of employees in your company.

There are two third-party software components which require licensing:

- ServletExec
- SQL Server

☞ *Refer to* **Estimating employee access for licensing and configuration issues** *(on page 37)* *for more information.*

Interactive Workforce License Key

The License Key unlocks the Interactive Workforce functionality you have purchased. If you wish to upgrade, please contact your Cyborg representative. If a new key has been purchased, you may change keys using the Properties Editor utility.

☞ *Refer to* **The Properties Editor utility** *(see "The Properties Editor" on page 48)* *for more information.*

ServletExec Licensing

Each environment requires a unique instance of ServletExec. This ensures isolation and data integrity between environments for maintenance and upgrade purposes. Interactive Workforce includes licensing for two environments. These two licenses may be used for the Test and Production environments. The Default install environment uses an unregistered version, because it will never go into full production.

☞ *More licenses can be obtained through Cyborg. Please contact your Cyborg representative for information.*

Database Licensing

The primary licensing concern is to ensure that the database licenses support Interactive Workforce usage, especially during peak usage times. The following must be licensed to support the maximum number of concurrent users:

- Interactive Workforce database
- Pay Information database

SQL Server

There are two parts to licensing SQL Server—a licensing for the server installation, and licensing for client access. You can license SQL in one of two ways—either 'Per Seat' or 'Per Server'. We recommend that you license SQL 'Per Server', which may provide enough Client Access Licenses (CALs) to cover your system needs. You can calculate the number of Client Access Licenses (CALs) based on the number of Interactive Workforce and database connections. Or, extra CALs may be purchased on a case-by-case basis.

☞ *For information regarding the licensing of SQL Server, visit the Microsoft website (www.microsoft.com).*

Database Licensing (UNIX, OS/390, and AS/400)

In UNIX, OS/390, and AS/400 installations, there must be enough Oracle or DB2 licenses, depending on the platform, to support the expected usage of the Pay Information database.

STAPI Connection Pools

The STAPI connection pools are the connections between eCyborg Interactive Workforce, the STAPI, and The Solution Series through which these software components interface. There are three sets of pools: the thread pool, which connects Interactive Workforce to the STAPI; the CYBIO pool, which connects STAPI to CYBIO; and the CBSVO pool, which connects the STAPI to CBSVO.

When a user first logs in to Interactive Workforce, a browser session is created with the web application server to Interactive Workforce, which remains active until the user logs off. This browser session is independent of the pools. The pools are used when a request is sent by Interactive Workforce through the STAPI to The Solution Series.

When a request is made, it first passes from Interactive Workforce into the STAPI connection pool. The connection pool is a bunch of threads used to enable multiple requests through Interactive Workforce to The Solution Series. The connection pool size should be configured to account for the estimated maximum number of concurrent users.

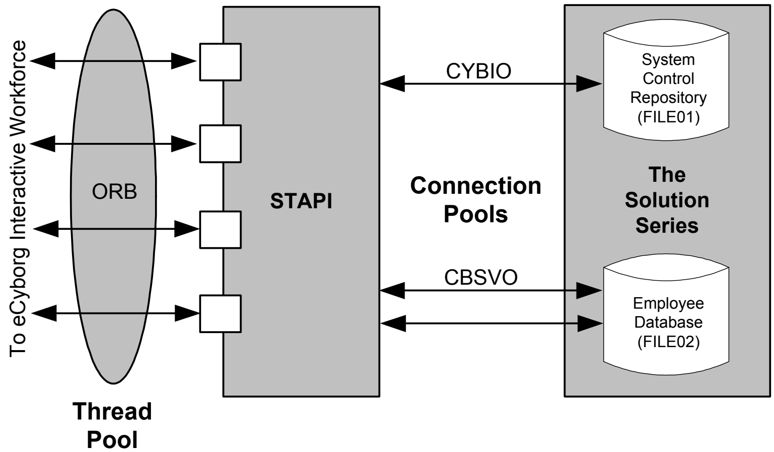
The STAPI uses these threads to process requests from Interactive Workforce, then determines whether a request requires a CYBIO or CBSVO connection.

If a request requires access to the System Control Repository (FILE01), the STAPI will assign a connection from the CYBIO pool. Because much of the information required by Interactive Workforce from the System Control Repository is also stored in the Interactive Workforce database, only a few requests will require a connection from the CYBIO pool.

If a request requires a command that accesses the Employee Database (FILE02), STAPI will assign a connection from the CBSVO pool. The majority of requests will be made to the Employee Database.

A connection in any of these pools is used only until an assigned request is filled, then the connection is freed up to service other requests. The STAPI uses this pooling method in order to efficiently use system resources while processing large volumes of user requests.

The connection pools are demonstrated in the following illustration:



Apply the Concept
Why is it important to configure the STAPI?

☞ *Refer to the Administering The Solution Series documentation for more information on the CYBIO and CBSVO.*

Thread Pool Size

The size of the thread pool determines the number of requests that can be serviced concurrently by STAPI. The Thread Pool Size should be equal the CYBIO plus CBSVO Maximum Connections. It is set in the STAPI configuration file.

☞ *Refer to* **Configuring the STAPI** *(on page 61) for more information.*

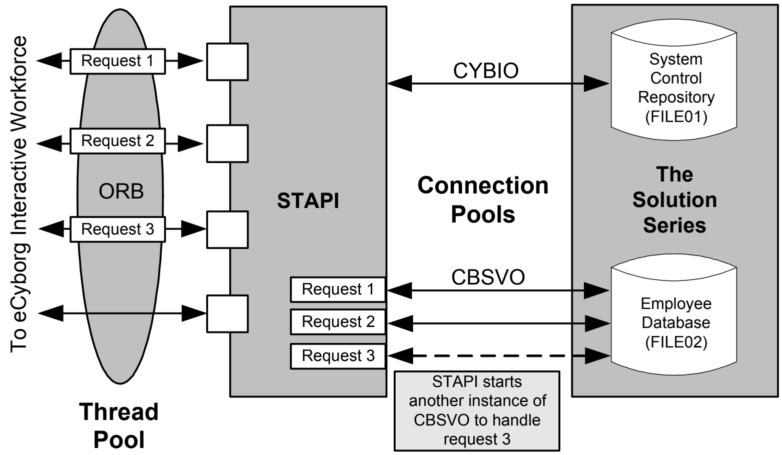
CYBIO and CBSVO Connection Pools - minimum and maximum

The number of requests that come through Interactive Workforce varies. For instance, during a benefits open enrollment period usage could increase ten times over a normal activity level. STAPI can be configured to support a range of user volume representing normal to peak usage.

Each connection pool is configured with a minimum and maximum number of connections. The Minimum number is the number of connections always present during low periods of user access to Interactive Workforce. They remain active to handle user requests as long as the STAPI is active.

As the number of users accessing the system increases, so does the need for connections. The Maximum number of Connections is an upper limit on the number of connections that are created to handle increased demand during peak usage. These instances are created whenever the pool of available connections has been exhausted and the maximum number of connections has not yet been reached.

The following illustration demonstrates how this works—assuming the system has a Minimum CBSVO Connections setting of 2:



In the illustration, there are three users logged into Interactive Workforce, each one using a STAPI connection. The first user makes a request, which requires a CYBIO connection. The second user's request needs a CBSVO. The third user's request also needs a CYBIO connection, but the Minimum CYBIO Connection Pool has been exhausted. So, the STAPI starts another instance of CYBIO to handle that user request.

For Interactive Workforce the majority of requests require a CBSVO connection. Only in rare cases does a request use a CYBIO connection.

☞ *Refer to* **Configuring the STAPI** *(on page 61) for more information.*

Apply the Concept
Considering the size of your company, what is the maximum number of connections? What is the minimum?

Eviction Interval

After instances of CYBIO or CBSVO have been started above the minimum, they remain active to handle further requests during peak usage. However, once the number of users has decreased and demand on the system has lowered, they take up processing resources. In order to free up these processing resources, the STAPI closes them.

The Eviction Interval is the number of minutes the STAPI will allow an instance of CYBIO or CBSVO beyond the minimum number configured to remain inactive. Once an instance has remained inactive for this amount of time, the STAPI will shut it down in order to free resources. The Eviction Interval applies only to those instances above the minimum.

☞ *Refer* **Configuring the STAPI** *(on page 61) for more information.*

CYBIO and CBSVO Connection Timeouts

There are two connection timeouts configurable in the STAPI configuration file: one for CYBIO connections and one for CBSVO connections. The timeout value specifies the number of seconds a connection can remain inactive before it is eligible for eviction. The Timeout applies to all instances of that program.

☞ *Refer to* **Configuring the STAPI** *(on page 61) for more information.*

The Split Point and the Session Counter

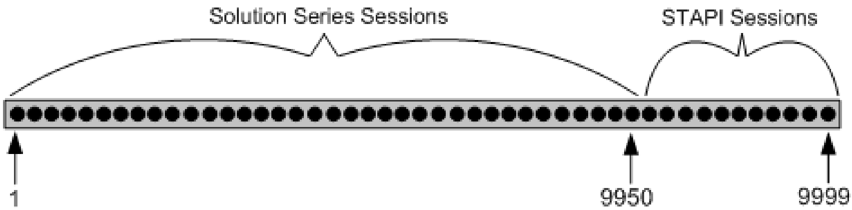
The Solution Series has a limited number of sessions available for connecting with the CBSVO between payroll runs. Each session is identified by a unique session number. It is from these sessions that the STAPI reserves the connections in the CBSVO Connection Pool.

The Split Point determines the number of connections reserved in CYBIO/CBSVO for use by the STAPI. It is configured in the Session Number Split Point form (SSCTRL) of The Solution Series. This value breaks the total Solution Series sessions into two groups: the session numbers below the split point are reserved for normal CYBIO/CBSVO use, and the session numbers above the split point are reserved for STAPI use.

The Split Point is configured during the installation process to 9950, allowing for up to 49 sessions. This should be sufficient for most installations.

Important! The Split Point can only be configured immediately after The Solution Series has completed a full payroll or maintenance run. A full payroll or maintenance run re-initializes the Session Counter, which must remain in this state in order for the Split Point configuration to take place. Once people start accessing the system, the Session Counter changes, and you must wait until the next payroll or maintenance run to reconfigure the Split Point.

The illustration following represents a system where the Split Point for the System Control Repository has been set to 9,950. Sessions 1 to 9,950 would be reserved for The Solution Series, while sessions 9,951 to 9,999 would be reserved solely for use by Interactive Workforce.



In order to keep track of STAPI-reserved sessions, CYBIO/CBSVO uses the STAPI Session Counter. The Session Counter assigns a number to each session, and uses these to track whether a session is available or in use. These Sessions Numbers will appear in the audit reports, the number listed with each action taken during that session.

The STAPI Session Counter has a maximum number of sessions. Once the maximum number has been reached, the counter goes back to the Split Point +1 and starts looking for the next available session.

This process, in conjunction with the concept of Connection Pooling, ensures that Solution Series sessions are always available for Interactive Workforce. The number of sessions must be equal to or larger than the Maximum CBSVO Connection Pool Size.

When STAPI is shut down and restarted, all sessions are reset.

☞ *Refer to* **Configuring the Split Point** *(on page 68) in this section for more information.*

Physical database connections and location

The Interactive Workforce and Pay Information database connections must also be configured.

Database connections

In order to use the Interactive Workforce and Pay Information databases, Interactive Workforce must establish a number of connections with the database application server. This number should be based on the maximum number of expected users.

There is an Initial Connection Count parameter for both the Interactive Workforce and Pay Information databases, which are configured in the Interactive Workforce properties file. This configuration should be based on the maximum concurrent number of users, and should be the same number as the Maximum CBSVO Connections parameter.

☞ *Refer* **Configuring Database Connections for Interactive Workforce** *(on page 66) for more information.*

The STAPI configuration file

The STAPI configuration file is used to configure the STAPI to operate with Interactive Workforce. In a typical two-server configuration, the STAPI configuration file is located on The Solution Series Application Server.

The parameters in this file which may be configured for Interactive Workforce are:

- Minimum CBSVO Connections
- Maximum CBSVO Connections
- CBSVOTimeout
- CBSVO Eviction Interval
- Minimum CYBIO Connections
- Maximum CYBIO Connections
- CYBIO Timeout
- CYBIO Eviction Interval
- Thread Pool Size

All of these parameters are discussed in detail later in this section. There are other parameters available in the STAPI configuration file, most of which you will never need to change. The following section lists all parameters in the file.

☞ *Refer to* **Configuring the STAPI** *(on page 61) for more information.*

The Properties Editor

The Interactive Workforce configuration utility is used to configure ServletExec to operate with Interactive Workforce. The utility is located on the Web Application Server.

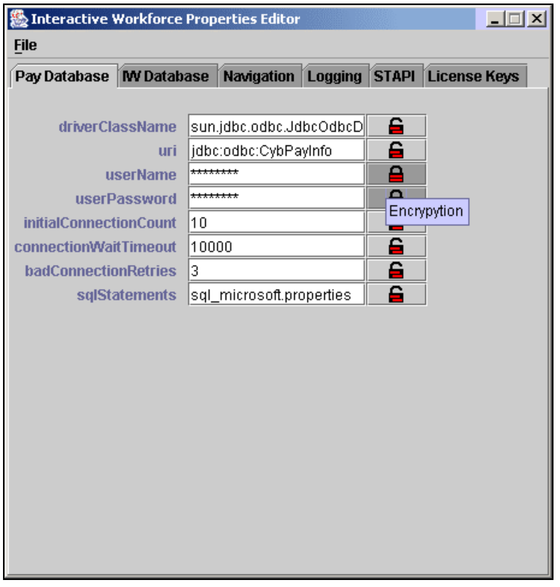
To start the Properties Editor, open a Command Prompt and go to the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\Resources

where *environment* is the name of the subdirectory and environment, then execute the following command string:

PropertiesEditor ess.properties

The configuration utility appears:



The Properties Editor can be used in configuring ServletExec parameters for the following:

- Pay Information Database
- IW Database
- Navigation
- Logging
- STAPI
- License Keys

Each parameter can be encrypted by clicking the lock button next to each parameter field. This is highly recommended for user names and passwords, but not necessary for other parameters. Once encrypted, a value will appear as a string of asterisks in the utility and in the properties file.

☞ *Refer to* **Configuring Database Connections for Interactive Workforce** *(on page 66) and* **Configuration Parameters** *(on page 333) for more information.*

Pay Information database parameters

Following are the Pay Information database parameters:

Parameter	Definition
driverClassName	Specifies the JDBC driver used to connect with the database.
uri	The Uniform Resource Identifier used to identify the database.
userName	User name for connecting to database.
userPassword	Password of user name.
initialConnection Count	Number of database connections.
connectionWait Timeout	Amount of time ServletExec will wait for a connection before quitting.
badConnection Retries	Number of bad connection attempts ServletExec will allow before giving an error message.
sqlStatments	Points to file with DB-specific syntax.

IW database parameters

Following are the IW database parameters:

Parameter	Definition
driverClassName	Specifies the JDBC driver used to connect with the database.
uri	The Uniform Resource Identifier used to identify the database.
userName	User name for connecting to database.
userPassword	Password of username.
initialConnection Count	Number of database connections.
connectionWait Timeout	Amount of time ServletExec will wait for a connection before quitting.
badConnection Retries	Number of bad connection attmpts ServletExec will allow before giving an error message.

Navigation parameters

Following are the Navigation parameters:

Parameter	Definition
urlBase	The base for the Interactive Workforce Universal Resource Locator (URL).
mapBaseDirectory	Name of the ..\maps directory.
disableCache	If set to 'true', prevents pages from being cached by browser. Can be used for security purposes, but slows performance.

Logging parameters

Following is the Logging parameter:

Parameter	Definition
filename	The name of the Interactive Workforce log.

STAPI parameters

Following are the STAPI parameters:

Parameter	Definition
orbProperties Filename	Name of the properties file used by the ORB.
userName	Username for accessing the CAS or CAB.
userPassword	Password for username.
environment	Name of the CAS to which the environment connects.

License Keys

Following is the License Key parameter:

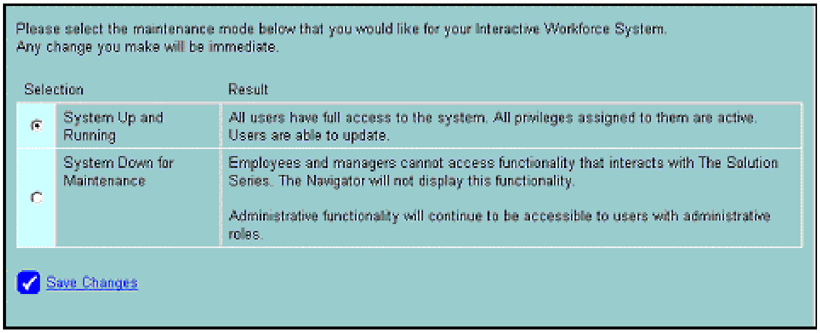
Parameter	Definition
LicenseKey	This is the license key for Interactive Workforce.

Considerations when bringing Interactive Workforce down for maintenance

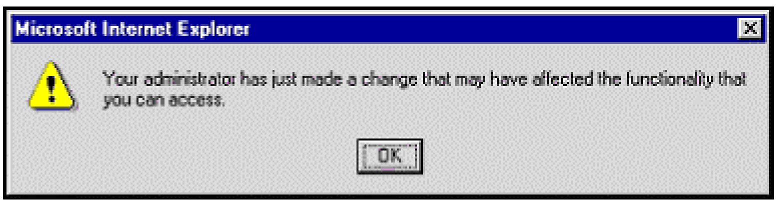
Periodically, Interactive Workforce may be brought down while maintenance is being performed on The Solution Series. Using the System Maintenance page, you can select System Down for Maintenance.

In order to use the System Down functionality, you must have Administrator access to Interactive Workforce.

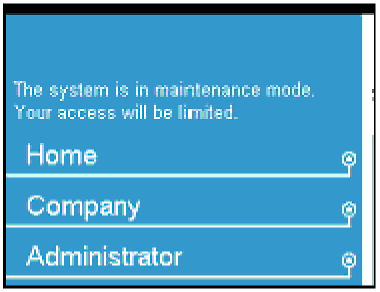
Select System Down about 30 minutes before maintenance begins. The time period should be at least 10 minutes beyond the browser time out period. This allows users time to finish any tasks they are performing.



Users logged onto the system when you change the status of the system to 'up' or 'down' see the following dialog informing them of a change.



If the system is 'down', the following message displays at the top of the Navigator telling users that their access is limited, and the Employee functions that require interaction with The Solution Series no longer display on the Navigator.



☞ *Refer to* **Performing system maintenance** *(on page 58) for more information.*

Start Interactive Workforce

In order to run Interactive Workforce, two software components must be started: ServletExec on the Web Application Server, and the Orbix daemon on the The Solution Series Application Server. Since both ServletExec and Orbix are installed as services, they will be started automatically when the host computer is booted up.

However, if you need to start them both manually, it is important that you start the Orbix daemon first. ServletExec will receive error messages when it looks for the STAPI, if the daemon is not there to start the STAPI.

☞ *Refer to* **Starting Interactive Workforce** *(on page 70).*

Start Orbix

Orbix manages all STAPI instances running on The Solution Series Application Server. When the Orbix daemon is running, it recognizes when a call is made to an instance of STAPI. If the STAPI instance is not running the Orbix process will automatically start it, so only one Orbix instance must be running in order to accommodate multiple environment-specific instances of the STAPI.

Start ServletExec

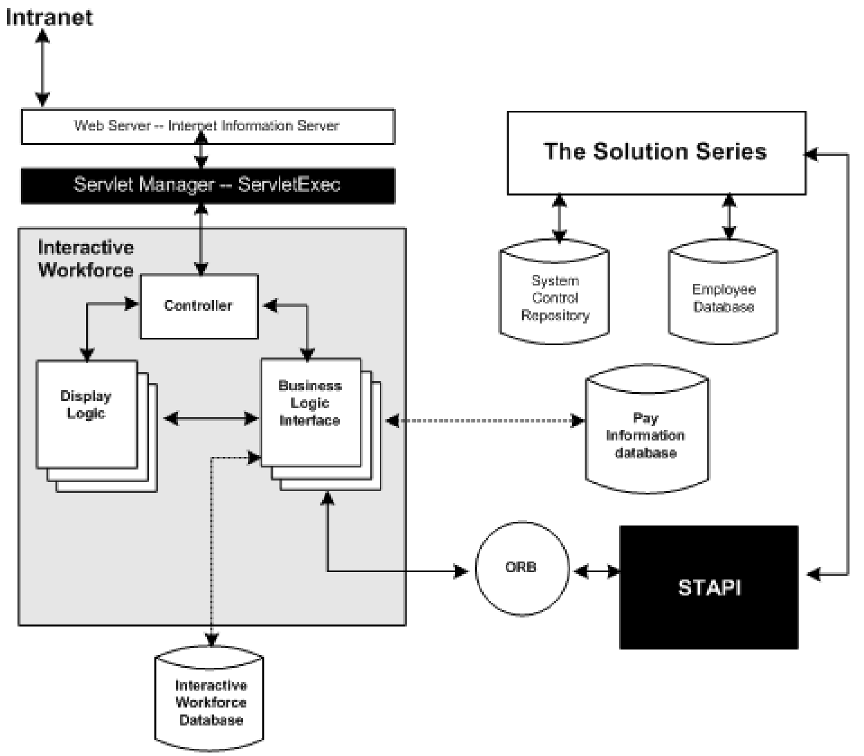
ServletExec handles web-side logic for Interactive Workforce, and is dependent on Internet Information Server (IIS) being up and running. With multiple environments, all environment-specific instances of ServletExec are being run as services, and will all be available on boot up. When performing maintenance on a specific environment, that environment-specific instance must be restarted independently using the Services control panel.

Shut down Interactive Workforce

Generally, Interactive Workforce should be running 24 hours a day, but you will sometimes need to take the system down in order to perform maintenance. One of the responsibilities of the Technical Administrator is to apply enhancements and upgrades. You need to shut down Interactive Workforce when making these updates to the system.

When shutting down the system for updates, it is recommended that you schedule the work to be performed after work hours, and that you issue notification of system unavailability to all Interactive Workforce users prior to shut down.

Interactive Workforce is shut down by shutting down two software components: ServletExec and the STAPI. Once these two components have been stopped, then access to Interactive Workforce is no longer available until they are restarted. Depending on whether your implementation is a Single- or Two-Server Configuration, these components may or may not be located on the same machine.



The shut down is performed in three phases:

1. Run the System Shutdown feature
2. Shut down ServletExec
3. Shut down the STAPI

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) for more information on shutting down Interactive Workforce.*

Apply the Concept
What two software components have to be shut down in order to shut down Interactive Workforce?

Shut down ServletExec

On the Web Application Server, ServletExec manages all the web processes of Interactive Workforce, so shutting down ServletExec has the effect of shutting down the intranet end of the system. ServletExec is run as a service, and must be shut down using the Services control panel.

When running multiple environments, each ServletExec service must be shut down separately using the Services control panel.

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) for more information on shutting down Interactive Workforce.*

Shut down the STAPI

When shutting off the back end, you will generally shut off only the STAPI for the environment you are working on. This leaves the Orbix ORB running for any other software that might use it. You can shut down an instance of STAPI of a particular environment by using the Orbix Server Manager, or by using the killStapiServer utility.

Orbix manages the STAPI server. When you shut down the Orbix daemon, it has the effect of shutting down all STAPI on the The Solution Series Application Server. If multiple STAPI environments are running on the The Solution Series Application Server, they are all shut down and are unavailable until the Orbix daemon is restarted.

In general, because shutting the Orbix daemon down makes it unavailable for other systems, you will want to leave it up and running. The only time you will likely want shut the daemon down is for doing maintenance or upgrades on the Orbix software.

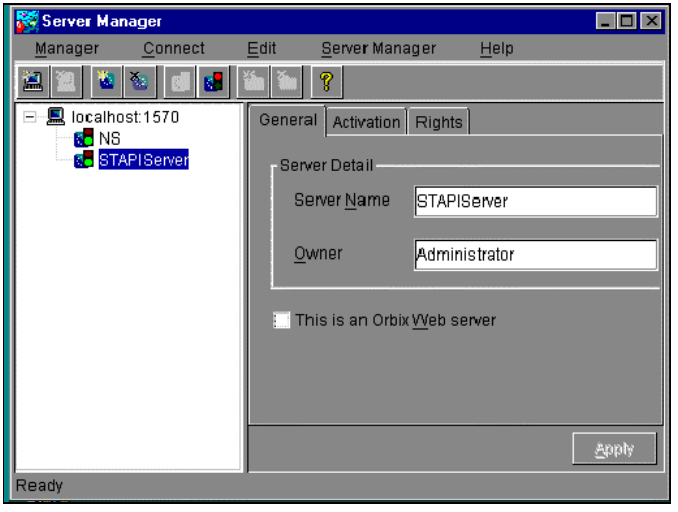
Maintaining Orbix

Orbix is an Object Request Broker (ORB) created by IONA. This is a CORBA-based middleware solution which allows the Business Logic Interface and STAPI to exchange data. Orbix is the C++ implementation of the ORB, while OrbixWeb is the Java implementation. In Interactive Workforce, the two work together to allow the Java components, which communicate with the browser via the Intranet, to talk to the C++ components, which communicate directly with The Solution Series.

The Orbix Daemon can be maintained using the Orbix Server Manager, which can be accessed by making the following selections from the Windows desktop:

Start ▶ Programs ▶ Interactive Workforce ▶ Orbix Tools ▶ Server Manager

The Orbix Server Manager appears as shown here:



☞ *For more information on Orbix, refer to the Orbix documentation.*

Restoring Orbix registrations

If there is a communication breakdown in Interactive Workforce, one of the possible causes is that the Orbix registrations of the STAPI and Interactive Workforce-related software, the STAPIServer have been corrupted. Should that happen, Cyborg provides the regserver.bat file. Run this batch file, and it will restore the Orbix registrations to their original settings.

To restore Orbix registrations to their original settings, run the following job:

Regserver.bat

The file can be found in the following filepath:

..\eCyborg\IW\Tools.bat

Once this file is run, it will restore the Orbix registrations of all Interactive Workforce components. Interactive Workforce must be shut down and restarted again for the restored registrations to take effect.

Limiting Orbix access rights

Unauthorized or accidental system downtimes may also pose potential problems for your system.

When Interactive Workforce is first installed, Orbix is by default set up as a shared server. This allows all users to request, launch, and invoke objects from the Orbix Naming Service, and STAPI. This could pose some unwanted problems.

For example, a user might be performing maintenance on another software product on the The Solution Series Application Server. While working, they may inadvertently shut down the Orbix Daemon, which is the running instance of the ORB through which the STAPI communicates with Interactive Workforce and The Solution Series. This would result in the system going down, allowing no employees to access Interactive Workforce until the Daemon is restarted. For this reason, restrict Orbix access rights to the Technical Administrator and backup(s).

When limiting Orbix access rights, there are two servers you need to configure:

- NS. The CORBA Name Service (NS) is a repository of object names registered with the ORB which the Orbix Daemon uses in locating components of Interactive Workforce and the STAPI.
- STAPIServer. This is the STAPI Service, which forms the bridge between Interactive Workforce and The Solution Series.

Orbix access rights are configured using the Orbix Server Manager.

☞ *For more information on using the Orbix Service Manager, please refer to the Orbix documentation.*

Orbix diagnostics

Orbix diagnostics output information on the Orbix Daemon to the STAPI.log file. The amount of information is controlled by the diagnostic level. The Orbix diagnostics level is configured in the STAPI configuration file. In a typical two-server configuration, this file is located on The Solution Series Application Server.

You can change the Orbix diagnostics level in the STAPI configuration file:

…\eCyborg\IW\Stapi-*environment*\Config\STAPI.cfg

In the file, look for the Diagnostic Level parameter:

```
[STAPI]
DiagnosticLevel=2
ServerTimeout=NEVER_TIMEOUT
CreateSTWithConsole=FALSE
(complete text not shown)
```

This parameter can be set to the following values:

Level	Description
0	No diagnostic (default)
1	Simple diagnostics
2	Full diagnostics

Once you have changed the diagnostic level and saved the file, you must restart Interactive Workforce for the change to take effect.

☞ *Refer to the Orbix online documentation for more information regarding Orbix diagnostics.* *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for information on restarting Interactive Workforce.*

Detailed Directions

This section provides detailed instructions for the tasks described in this section.

Tasks

Performing system maintenance

Use the System Maintenance page to inactivate Interactive Workforce for employee users so that maintenance can be performed on either Interactive Workforce or The Solution Series. Select System Down about 30 minutes before maintenance begins. The time period should be at least 10 minutes beyond the browser time out period. This allows users time to finish any tasks they are performing. Administrators can continue to access administrator functions.

1. Access the System Maintenance page

Log in to Interactive Workforce under an Interactive Workforce Administrator User ID. On the Navigator click Interactive Workforce and select System Maintenance.

Administration ▶ Interactive Workforce ▶ System Maintenance

For practice, access the Interactive Workforce System Maintenance page.

2. Select System Up and Running

Click System Up and Running to give users access to all functions assigned to them in Interactive Workforce.

Note *When the system is down, administrators continue to have access to their administrator functions.*

OR

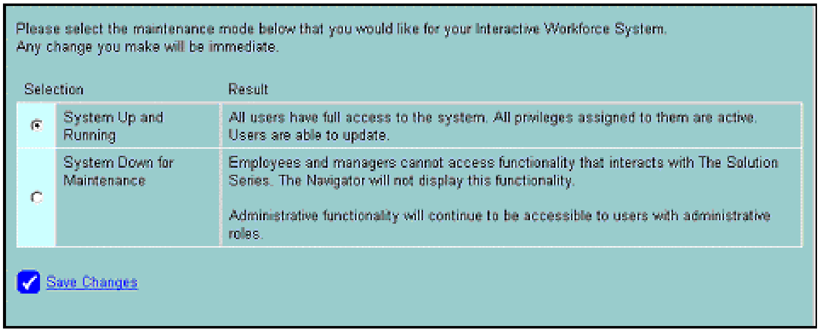
Select system Down for Maintenance

If you want to bring the system down for maintenance, click System Down for Maintenance. When you do this:

- The following message displays at the top of the Navigator: 'The system is in maintenance mode. Your access will be limited.'
- Links on the Navigator to Employee personal information and benefits enrollment functions no longer display
- Administrators can continue to access administrator functions

For practice, select System Up and Running.

If you completed the Guided Practice, the resulting page should look similar to the following example.



3. Click Save Changes

The system saves your changes.

OR

Choose another function from the Navigator

If you made no changes or you do not want to save your changes, choose another function from the Navigator.

Shutting down Interactive Workforce

This should be done before you update or configure the system. It is recommended that you schedule this during off hours, when no one will be accessing the system, and that you issue a company-wide notice that the system will be down during the scheduled time prior to shutting down the system.

Also, you should run the System Down utility in the System Maintenance page of Interactive Workforce before shutting down the system.

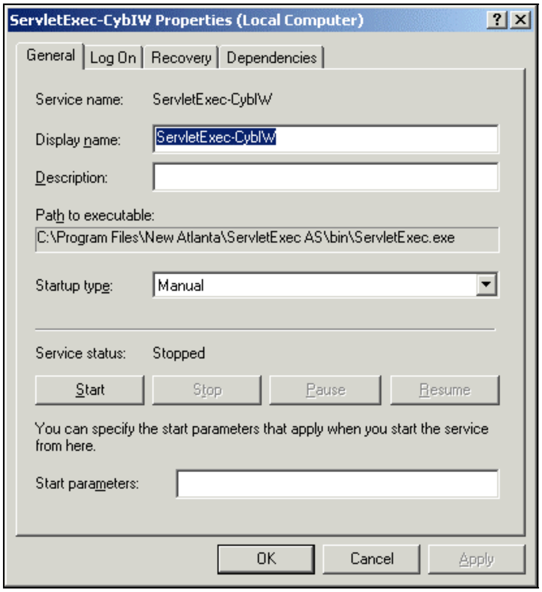
Refer to Performing system maintenance for more information.

1. Stop the ServletExec service

In a typical two-server configuration, this step will be performed on the Web Application Server. From the Windows desktop, make the following selections:

Start ▶ Settings ▶ Control Panel ▶ Administrative Tools ▶ Server Manager ▶ ServletExec-*instance*

The Server Manager dialog for the instance appears:



Click on Stop.

2. Stop the STAPI

In a two-server configuration, the STAPI is located on the The Solution Series Application Server. This step will be executed on the The Solution Series Application Server.

To stop the STAPI for a particular enviroment, go to the following directory:

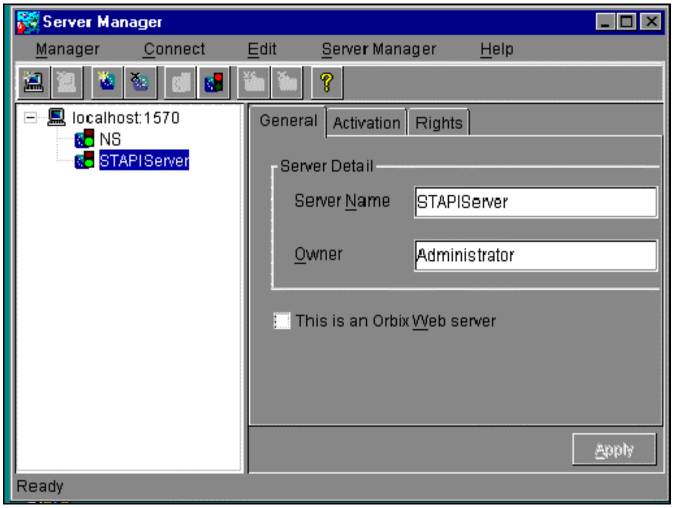
..\eCyborg\IW\STAPI-*environment*\Bin

and execute the following:

killStapiServer

Or, you can use the Orbix Server Manager. To stop a given instance of the STAPI server, first start the Orbix Server Manager with the following menu selection.

Start ▶ Programs ▶ Interactive Workforce ▶ Orbix Tools ▶ Server Manager



Locate the instance of STAPI you wish to shut down and select it. If it is running, there will be a red traffic light icon button on the toolbar. Select this button. Once the STAPI instance is shut down the red traffic light icon will become inactive and the green traffic light icon button will become active, indicating that it is stopped and can be restarted.

Configuring the STAPI

Prior to configuring parameters within the STAPI configuration file, you need to determine what some of these setting should be based on your company size.In a typical two-server configuration, this task is performed on The Solution Series Application Server, and is performed by editing the STAPI configuration file.

☞ *Refer to* **STAPI Connection Pools** *(on page 41) for more information.*

To configure the STAPI, complete the following steps:

1. Open the STAPI configuration file

The STAPI configuration file is located on The Solution Series Server, and can be opened using a text editor.

Depending on then environment, the STAPI configuration file may be found in the following location:

Platform	Server	Location
Windows	Solution Series Application Server	..\eCyborg\IW\Stapi-*environment*\config

Platform	Server	Location
UNIX, OS/390, AS/400	Web Application Server (Win)*	..\eCyborg\IW\Stapi-*environment*\config
*On all platforms, the Web Application Server is always run in Windows.		

2. Configure the Minimum CBSVO (FILE02) Connections

Edit the MinCBSVOConnections parameter by changing the number to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as shown here:

```
MinCbsvoConnections=5
MaxCbsvoConnections=10
CbsvoTimeout=600
CbsvoEvictionInterval=30
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12

(complete text not shown)
```

3. Configure the Maximum CBSVO Connections

Edit the MaxCBSVOConnections parameter by changing the number to the right of the equal sign. The MaxCBSVOConnections number should be the same as the ThreadPoolSize. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

```
MinCbsvoConnections=5
MaxCbsvoConnections=20
CbsvoTimeout=600
CbsvoEvictionInterval=30
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12

(complete text not shown)
```

4. **Configure the CBSVO Timeout**

This is the number of seconds that a connection can remain inactive before it is considered a candidate for eviction. Edit the CbsvoTimeout parameter by changing the number of seconds for the desired timeout duration to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

```
MinCbsvoConnections=1
MaxCbsvoConnections=10
CbsvoTimeout=1200
CbsvoEvictionInterval=30
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12

(complete text not shown)
```

5. **Configure the CBSVO Eviction Interval**

This is the number of minutes after which timed out connections are released as resources. Connections are released only down to the minimum configured. Edit the CBSVO Eviction Interval parameter by changing the number of minutes for the eviction interval to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

```
MinCbsvoConnections=1
MaxCbsvoConnections=10
CbsvoTimeout=1200
CbsvoEvictionInterval=60
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
 ThreadPoolSize=12

(complete text not shown)
```

6. Configure the Minimum CYBIO (FILE01) Connections

Edit the MinCYBIOConnections parameter by changing the number to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

MinCbsvoConnections=5
MaxCbsvoConnections=20
CbsvoTimeout=1200
CbsvoEvictionInterval=60
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12
(complete text not shown)

7. Configure the Maximum CYBIO Connections

Edit the MaxCYBIOConnections parameter by changing the number to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

MinCbsvoConnections=5
MaxCbsvoConnections=20
CbsvoTimeout=1200
CbsvoEvictionInterval=60
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12

(complete text not shown)

8. Configure the CYBIO Timeout

This is the number of seconds that a connection can remain inactive before it is considered a candidate for eviction. Edit the CYBIO Timeout parameter by changing the number of seconds for the desired timeout duration to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

```
MinCbsvoConnections=1
MaxCbsvoConnections=10
CbsvoTimeout=1200
CbsvoEvictionInterval=60
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=600
CybioEvictionInterval=25
ThreadPoolSize=12
(complete text not shown)
```

9. Configure the CYBIO Eviction Interval

This is the number of minutes after which timed out connections are released as resources. Connections are released only down to the minimum configured. Edit the CYBIO Eviction Interval parameter by changing the number of minutes for the desired eviction interval to the right of the equal sign. Use the table at the beginning of this section to help you determine this number.

The file should appear as the example shown here:

```
MinCbsvoConnections=1
MaxCbsvoConnections=10
CbsvoTimeout=600
CbsvoEvictionInterval=30
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=600
CybioEvictionInterval=50
ThreadPoolSize=12
(complete text not shown)
```

10. Configure the Thread Pool Size

Edit the Thread Pool Size parameter by changing the number to the right of the equal sign. The Thread Pool Size must equal the sum of the Maximum CBSVO and CYBIO connections, based on your estimated maximum number of concurrent users. Use the table at the beginning of this section to help you determine this number.

The file should appear as shown here:

```
MinCbsvoConnections=1
MaxCbsvoConnections=10
CbsvoTimeout=600
CbsvoEvictionInterval=30
MinCybioConnections=1
MaxCybioConnections=2
CybioTimeout=300
CybioEvictionInterval=25
ThreadPoolSize=12

(complete text not shown)
```

11. Save the edited STAPI configuration file

At this point, you may close the text editor. These changes will not take effect until the STAPI has been shut down and restarted. Before doing that, you must first reconfigure the Interactive Workforce properties file.

12. Shut down and restart Interactive Workforce

These changes will not take affect until the system has been restarted.

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for more information.*

Configuring Database Connections for Interactive Workforce

Prior to configuring parameters within the Interactive Workforce properties file, you need to determine what some of these setting should be based on your company size.

☞ *Refer to* **Licensing Requirements** *(on page 39) for more information.*

In a typical two-server configuration, this task will be performed on the Web Application Server.

Note *Before performing this task, you may need to reconfigure the number of users on your database application server.*

☞ *Please refer to your database application server documentation for more information.*

To configure *Interactive Workforce*, complete the following steps:

1. Start the Properties Editor

To start the Properties Editor, open a Command Prompt and go to the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*

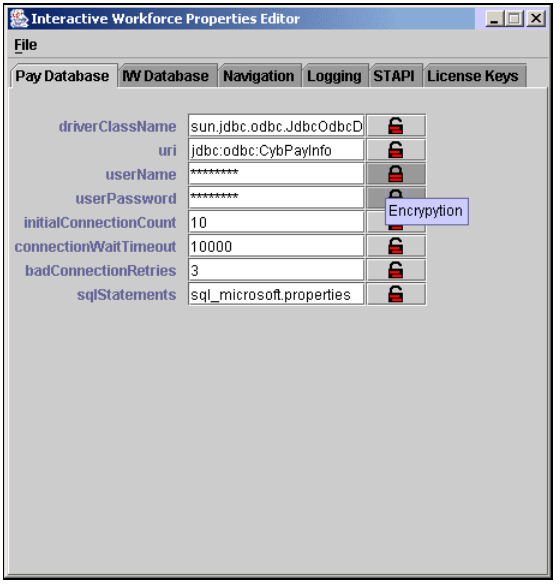
where *environment* is the name of the ServletExec instance for that environment, then execute the following command string:

PropertiesEditor ess.properties

The configuration utility appears.

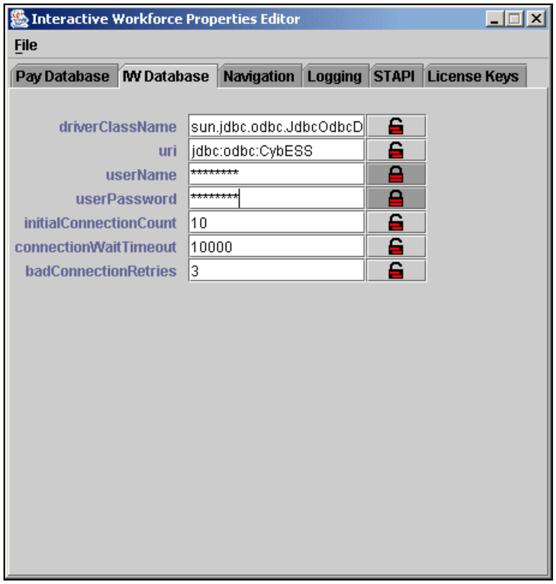
2. Configure the Pay Information database initialConnectionCount

Change initialConnectionCount parameter by changing the number in the field. Use the table at the beginning of this section to help you determine this number.



3. Configure the IW database initialConnectionCount

Change initialConnectionCount parameter by changing the number in the field. Use the table at the beginning of this section to help you determine this number.



4. Save the changes

To save your changes, make the following selections from the Properties Editor dialog:

File ▶ Save

Configuring the Split Point

> **Important!** The Split Point can only be configured immediately after The Solution Series has completed a full payroll run. A full payroll run re-initializes the Session Counter, and it must remain in that state in order for the Split Point configuration to take place. Once people start accessing the system, the Session Counter changes, and you must wait until the next payroll run to reconfigure the Split Point.

This task is to be performed on The Solution Series Application Server, and is performed on the Session Number Split Point form (SSCTRL).

☞ *Refer to* **The Split Point and the Session Counter** *(on page 44) for more information.*

To perform this task, complete the following steps:

1. Log in to The Solution Series

Start The Solution Series by making the following selections from the desktop:

Start ▶ Programs ▶ The Solution Series ▶ The Solution Series

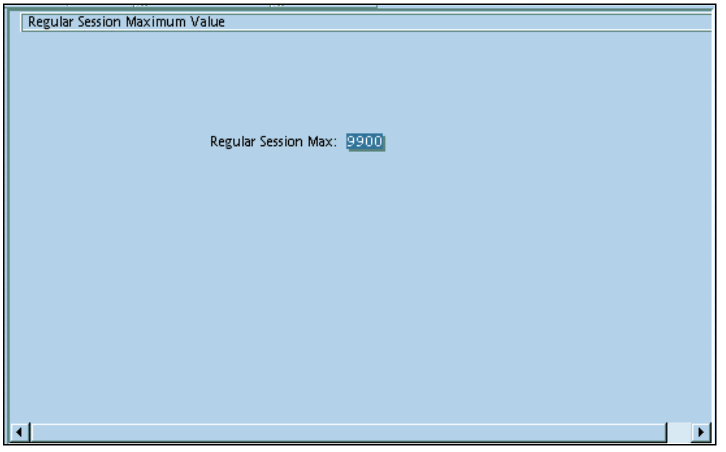
Once you reach the login screen, log in using the Security Officer profile.

2. **Access the Session Number Split Point form (SSCTRL)**

From The Solution Series desktop, make the following selections:

Tools ▶ Administrator Tools ▶ Administrator Tools ▶ Set Session Maximum

The Session Number Split Point form (SSCTRL) appears:



3. **Type the desired value in the Split Point field**
4. **Press Enter**

This enters the new Split Point into The Solution Series. Now, the system must be restarted for the change to take effect. You may close The Solution Series at this point.

Reconfiguring the STAPI

This task must be performed on the The Solution Series Application Server computer.

1. **Shut down Interactive Workforce**

Before any changes can be made to the system, all the components of Interactive Workforce must be shut down.

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59)*.

2. **Copy the original StapiServer configuration file into the config directory**

This can be performed using Windows Explorer, or the command prompt. A backup of the original STAPI.cfg file can be found in the following directory:

..\eCyborg\IW\Stapi-*environment*\config\backup\STAPI.cfg

Copy this file up a level to the following filepath:

..\eCyborg\IW\Stapi-*environment*\config\STAPI.cfg

3. Restart Interactive Workforce

Interactive Workforce must now be restarted for the restored configurations to take effect.

☞ *Refer to* **Starting Interactive Workforce** *(on page 70).*

Starting Interactive Workforce

In a typical two-server configuration, these steps will be performed on different computers. It is noted whether a step will be performed on the Web Application Server or the The Solution Series Application Server. In a single-server configuration, both steps will be performed on the same machine.

In order for Interactive Workforce to operate, you will need to have the Internet Information Server (IIS) running. After you have Started Interactive Workforce, you should turn off the System Down utility of the System Maintenance page in Interactive Workforce.

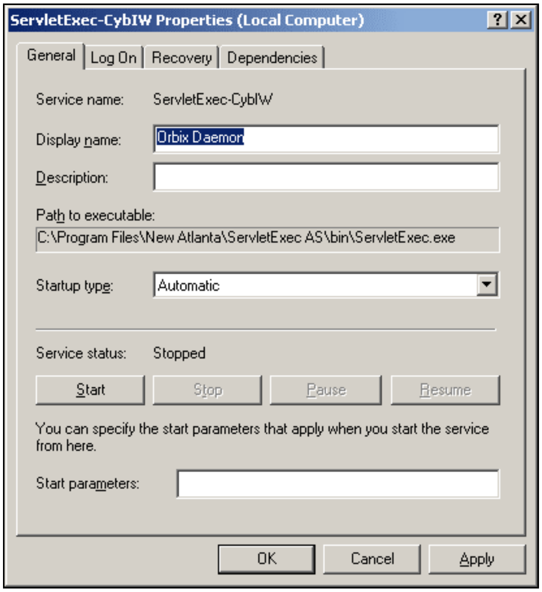
☞ *Refer to Performing system maintenance for more information.*

1. Start the Orbix demon (if not already running)

In a two-server configuration, this step must be performed on the The Solution Series Application Server. Start the Orbix daemon, make the following selections from the Windows desktop:

Start ▶ Settings ▶ Control Panel ▶ Services ▶ Administrative Tools ▶ Orbix Daemon

The Services Manager dialog for the Orbix Daemon appears:



Click on **Start**. This will start the Orbix daemon, which ensures that the appropriate STAPI server is started automatically when it is needed.

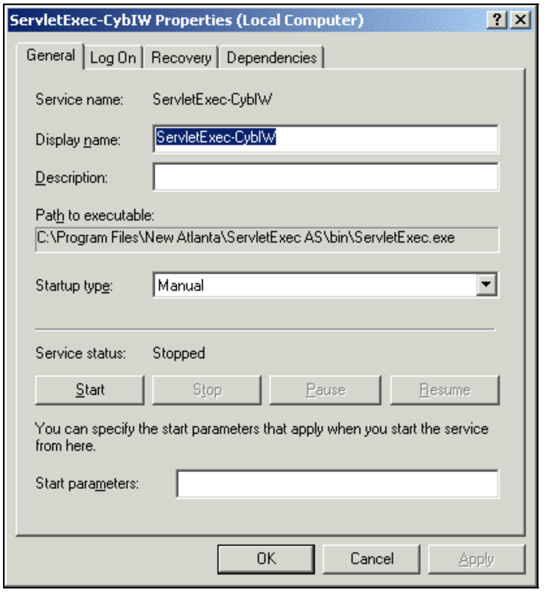
2. Start ServletExec

In a two-server configuration, this must be performed on the Web Application Server.

To start an instance of the ServletExec service, access the Services control panel by making the following selections from the Windows desktop:

Start ▶ Settings ▶ Control Panel ▶ Administrative Tools ▶ Server Manager ▶ ServletExec-*instance*

The Server Manager dialog for the instance appears:



Click on **Start**.

Review of Questions Answered

1. What has been installed? What are the post-installation issues?

2. How is the maximum number of concurrent users determined?

3. What are the licensing requirements?

4. What are the Connection Pools and how do they work?

5. What is the Split Point, and where is it configured?

CHAPTER 4

Web Implementation

In This Chapter

Web Implementation

This chapter addresses the set up and maintenance of some of the web issues in eCyborg Interactive Workforce.

On all platforms, the Web Application Server is run on Windows machine, so all of the concepts and tasks in this chapter are in Windows, but apply to installations on all supported platforms.

Overview of Web Implementation

Once eCyborg Interactive Workforce has been installed, there are some issues regarding the web end that you will need to cover before placing the system into full production.

Most important among these issues is the implementation of the Secure Socket Layer (SSL). SSL is a layer of security—it encrypts messages being sent between the web browser client and the server.

Web Implementation and maintenance also includes keeping the tax forms, available through Interactive Workforce in .pdf format, current with the tax year. This is done by accessing the web sites of the proper tax authorities, downloading the .pdf files of the appropriate tax forms, then linking those files to the Tax Forms page.

Maintaining client machines is also part of Web Implementation and maintenance. Finally, it also includes reviewing and tailoring Information links to your company's requirements.

Tasks

This chapter explains the following:

- ServletExec Administration
- Company Links
- Information Pages
- Maintaining the Client
- Secure Socket Layers

Questions answered

The following questions are answered in this chapter:

1. What does the Secure Socket Layer (SSL) provide for the system?
2. How should Interactive Workforce be accessed when set up at a kiosk?
3. Why does Interactive Workforce require Adobe Acrobat Reader?
4. How do I maintain tax forms in Interactive Workforce?
5. What are information links, and why should they be tailored for the company?

ServletExec Administration

ServletExec is the engine which interprets the Interactive Workforce Java Server Pages for the IIS Web Application Server. It can be configured using the ServletExec Admin page, which can be accessed by making the following selections from the Windows desktop:

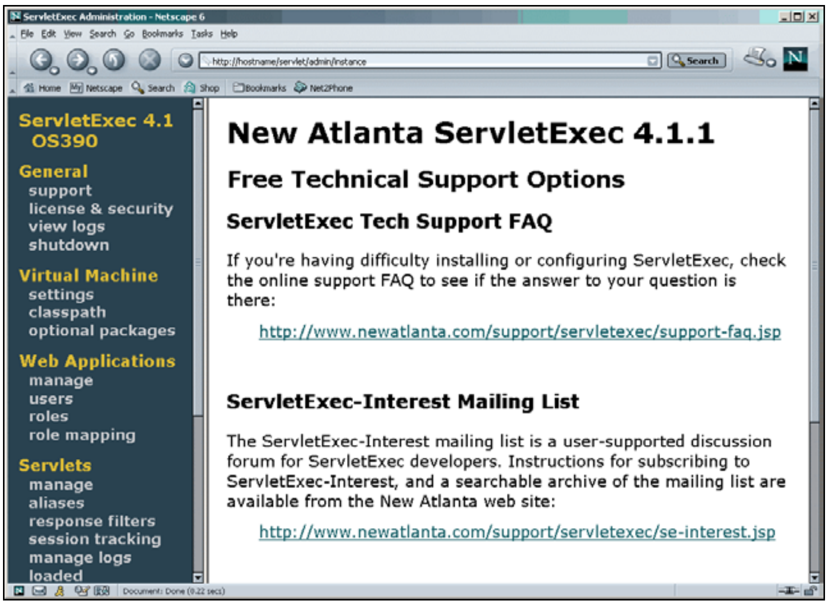
Start ▶ Programs ▶ New Atlanta ▶ ServletExec 4.1.1 AS ▶ ServletExec Admin

or through a web browser on the Web Application Server by using the following following URL:

http://localhost/servlet/admin

Note *You can do this from a client workstation, as well. However, you would need to use the Web Application Server's HOSTNAME instead of 'localhost'.*

The ServletExec Admin page appears:



This page can be used for:

- Setting the ServletExec Admin password
- Managing the Interactive Workforce application
- Configuring the ServletExec Invalidation Time
- Logging

☞ *For more detailed information, please refer to the ServletExec documentation.*

Set up ServletExec Admin page password

In order to secure the ServletExec Admin page from tampering, you should access the License and Security page of the utility in order to set up an Admin Username and Password, allowing access to configure servlet instances only to that user.

☞ *For more detailed information, please refer to the ServletExec documentation.*

ServletExec environment registration

When ServletExec is installed, it creates a catch-all environment registration by setting the 'hosts' parameter to 'all' in the ess.properties file. This setting references all registered Interactive Workforce environments, but should be removed. Instead, each environment should have a separate listing within ess.properties in order to ensure isolation between different environments.

```
servletexec.instancename.hosts=all (REMOVE)
servletexec.instancename.applications=
servletexec.instancename.aliases=/servlet,.jsp
servletexec.instancename.instances=127.0.0.1:8888
```

Note: *Once the server name is defined in the hosts parameter, that server name must always be used when accessing that environment. For example, if you register the server by its hostname (eg., 'ThisServer') in the hosts parameter, you cannot access the environment using an extended domain name (eg., 'ThisServer.ThisNetwork.ThisDomain').*

ServletExec configurations

There are several ServletExec Session Tracking configurations you should know about regarding Interactive Workforce:

- Cookies and URL rewriting
- Invalidation Time

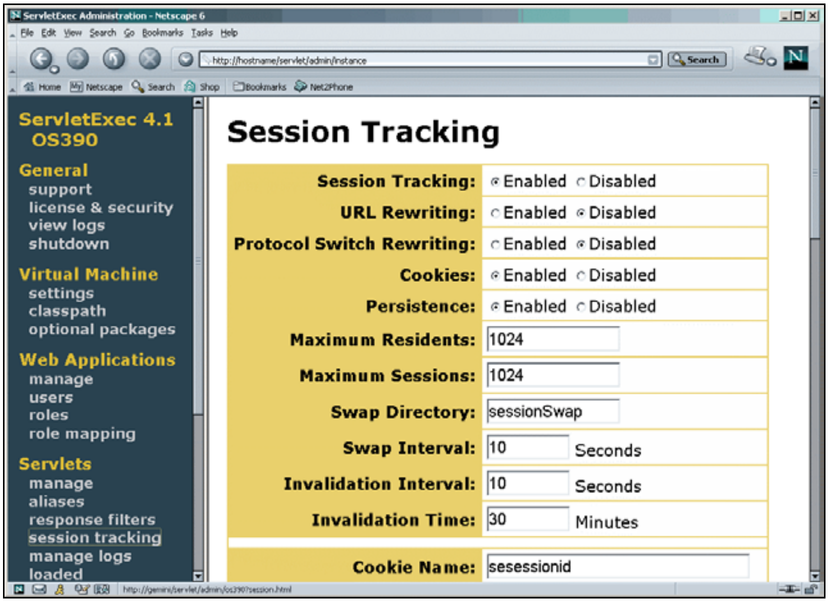
To access the Session Tracking page, start up the ServletExec Admin page. Then select an Interactive Workforce Environment, for example:

CybIW

Note: If only one instance is installed, the ServletExec Administration page will take you directly to that instance.

Then make the following selections:

Advanced ▶ Session Tracking



☞ *For information regarding the other configurations available on the Session Tracking page, please refer to the ServletExec documentation.*

Cookies and URL rewriting

When a user logs in to Interactive Workforce, ServletExec drops a cookie onto the machine which it uses in identifying the Session ID. It will only do this with browsers which accept cookies.

URL rewriting can be used for browsers which do not accept cookies. In this case, ServletExec replaces the URL of the client machine with a Session ID.

Both of these options can be Enabled/Disabled from the Sessions page, but one of them must be on in order for the system to work.

Invalidation Time

Setting the ServletExec invalidation time to an appropriate duration is another way to protect confidential data. For example, a user logs into Interactive Workforce, then gets called off on an emergency and forgets to log out properly. Someone else might come along and see their session still up and running, and tamper with the first user's information.

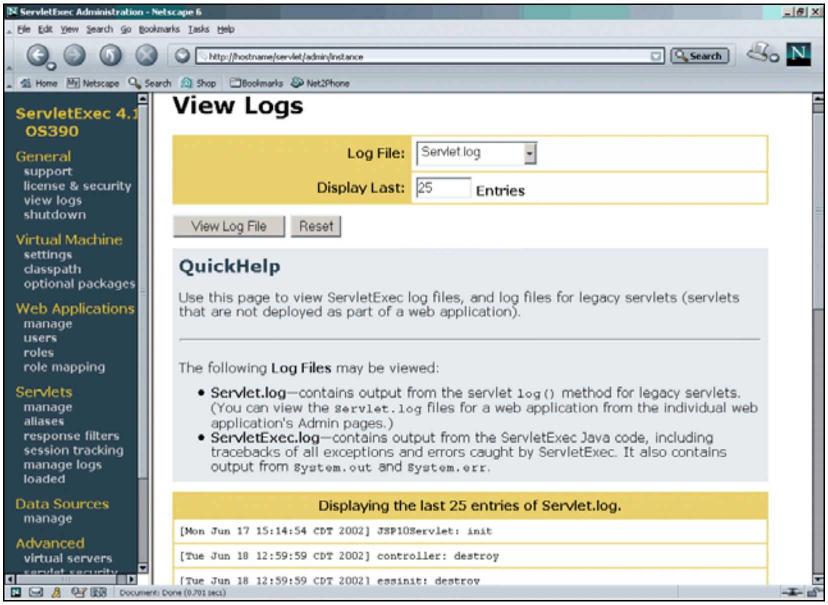
To help prevent such a scenario, you should set the ServletExec Invalidation for an appropriate duration. For example, installations using kiosks may require a shorter duration, perhaps as short as a minute. Whereas in an installation where typical access will be through a desktop PC, durations as long as five minutes may be acceptable. You will need to determine the length of the ServletExec invalidation time.

> **Important!** For security reasons, you should shorten the Invalidation Time to a duration best suited for your implementation.

Logging

To use the logging utility of the ServletExec Admin page, click View Logs to bring up the View Logs page. Using this page, you can use the Log File field to select which log you wish to view.

Click View Log File to bring up the log in the web page. The page should appear similar to the example shown here:



☞ *For more information on ServletExec logs, please refer to the ServletExec documentation.*

Company links

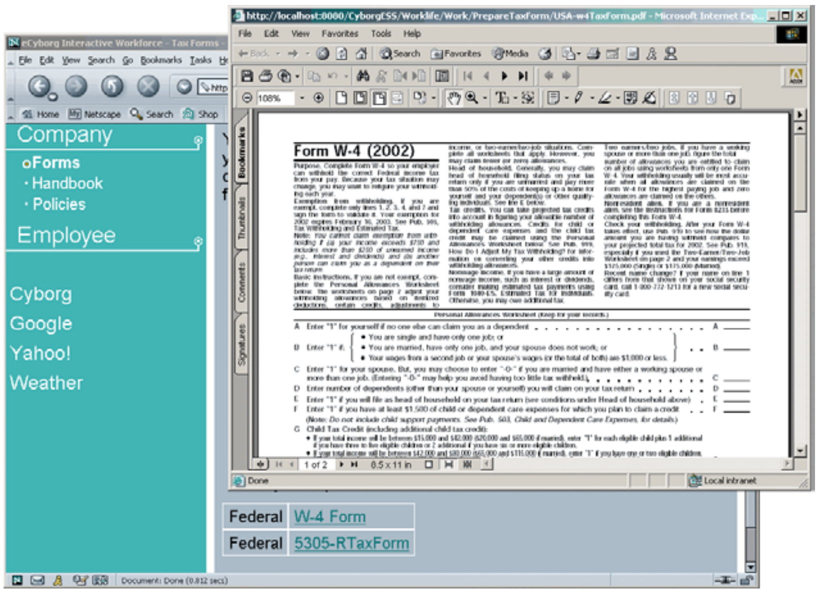
The Interactive Workforce Navigator contains several links grouped under the 'Company' option which must be added before going into full production:

- 'Forms' link
- 'Handbooks' and 'Policies' links
- Other Company links

'Forms' link

The Forms link takes you to the Forms page of Interactive Workforce, which contains .pdf files of tax forms for employees to download. Thus, whenever they need to change their tax information, they can download the proper tax forms from the company intranet, then fill them out before turning them in to Human Resources.

One responsibility of the Technical Administrator is to acquire all of the required forms from the proper tax authorities, adding these to the Tax Forms page for your implementation, and maintaining these files as the tax authorities change the forms. The Payroll Administrator should supply a list of which tax forms are required.



After downloading the .pdf file of the required tax forms from then website of the tax authority, store the tax form in the following filepath:

..\Inetpub\wwwroot\CyborgESS\Worklife\Work\PrepareTaxForm

Then add a link to the form in the following file located in the same directory:

TaxFormMain.jsp

Scroll through the file until you find the desired location for the link, then add the tax form .pdf according to the following example:

```
<tr>
  <td><%=i18n.getHtml("USA")%></td>
    <td>
      <a href=
           "javascript:infoWindow
           ('<%=path%>/<%=i18n.getPlainText("W4TaxFormFilename")%>')">
        <%=i18n.getHtml("W4TaxForm")%>
      </a>
  </td>
</tr>

<tr>
  <td><%=i18n.getHtml("GovernmentBodyID")%></td>
    <td>
      <a href=
           "javascript:infoWindow
           ('<%=path%>/<%=i18n.getPlainText("FileNameID")%>')">
        <%=i18n.getHtml("FormNameID")%>
      </a>
  </td>
</tr>
```

This link code uses the following commands:

- i18n.getHtml("*country*") := This call sets the country of the tax form to be linked.
- <a> := Hyper link. This is the opening tag, indicating that the information within the paired tags is a hyper link.
- href := Hypertext reference. This command indicates that the following information contained in quotes is the linked file.
- javascript:infoWindow("...") := This is a call to a javascript function which opens the file in a child window.
- i18n.getPlainText("...") := This is a call setting the string in quotes, or the name of the tax file, as the linked file.
- i18n.getHtml("...") := This is a call setting the string in quotes as the text to be displayed as the link.
- >?< := Text. The information between the tags is the text that will be displayed on the web page. This text will appear as a hyper link on the web page.
- := End of hyper link. This is the closing tag.

After the link has been added to the TaxFormMain.jsp, you must add the text strings for the link in the following resource file:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\Resources\TaxFormResources.properties

For example:

```
# USA
USA=Federal
W4TaxForm=W-4 Form
W4TaxFormFilename=USA-w4TaxForm.pdf

# Country
GeovernmentBodyID=GovernmentBody
FormNameID=Tax Form Name
 FileNameID=Filename
```

Apply the Concept

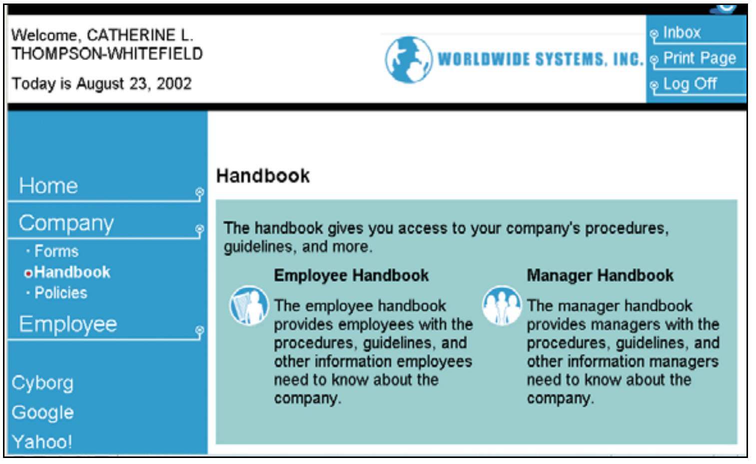
What is the web site for your local tax authority?

'Handbook' and 'Policies' links

The 'Handbook' link allows you to link a web page containing the company handbook. The handbook may be in the form of a .pdf file or .html files. These pages must be supplied by your company, but are linked directly into Interactive Workforce.

The 'Policies' link should be used to add a listing of company policies in either .pdf or .html formats. Or, this could be a link to another website with company policies. These pages must be supplied by your company, but are linked directly into Interactive Workforce.

'Handbook' and 'Policies' link placeholders. The system ships with placeholders for the 'Handbook' and 'Policies' links, which should be replaced with the real company link before going full production. Below is an example of the 'Handbook' link placeholder:



Once you determine the format of the these pages, open the SiteMapResources.properties file located in the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\Resources

then locate the 'Handbook' or 'Policies' Node IDs and edit the value to reference the filepath and name of the desired file:

```
Company=Company
Forms=Forms
Handbook=NewHandbook.htm
Policies=NewPolicies.pdf
JobOpenings=Job Openings
```

Other Company links

The bottom section of the Navigator is especially designed for including links to pages outside Interactive Workforce. For example, if you wanted to link a site for employees to check out the weather, or another portal page such as Yahoo. Links can also be added to the Site Map if you want them to appear somewhere in the Navigator menu structure.

For links to appear in the section below the main menu structure of the Navigator, you must add the link to the company.html file, located in the following directory:

..\Inetpub\wwwroot\CyborgESS\LAF\company.html

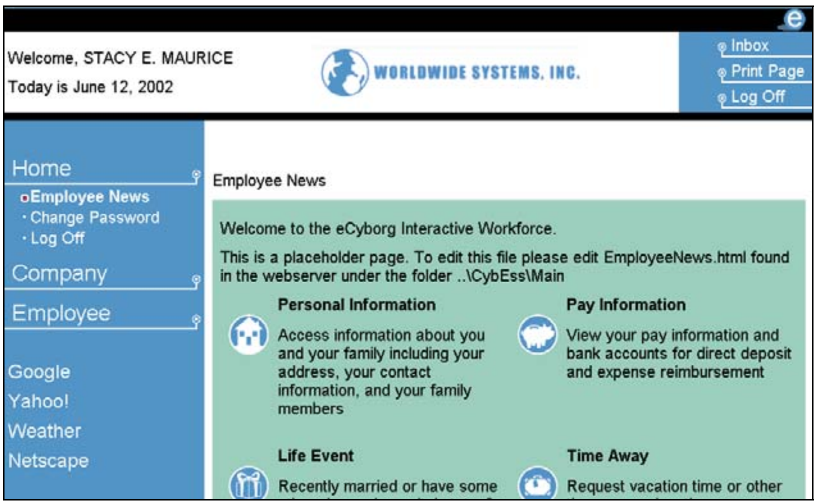
You can add a link to another website, for instance:

Netscape

Place the link in the company.html file along with the other website links, as shown here:

```
<div id='companyContent' >
<a href='http://www.google.com/'>Google</a>
<a href='http://www.yahoo.com/'>Yahoo!</a>
<a href='http://www.weather.com/'>Weather</a>
<a href='http://www.netscape.com/'>Netscape</a>
</div>
```

Once the code has been added, save the file. The new link will appear in the Navigator:



☞ *Refer to* **Reviewing and Tailoring Information Pages** *(see "Information Pages" on page 87).*

Information Pages

Information pages offer the end user information they may need to know while setting up or maintaining their HR data. Some of the pages accessed by information pages require company-specific information, which must be supplied by the various Interactive Workforce Functional Administrators (Interactive Workforce, Benefits, and Payroll). Each of these pages should be reviewed by the proper Functional Administrator, who will then modify or write text specific to your company needs.

Once they have supplied the required text for each of these pages, the Technical Administrator must modify the .html files for those pages with this new text. Please coordinate with your Interactive Workforce Functional Administrators.

☞ *Refer to eCyborg Interactive Workforce: The Administrator's Guide for more information.*

Existing Information Pages with company-specific information (required)

Some Information Pages are delivered as placeholders containing no useful information, and it is essential that someone within your company (Interactive Workforce Administrator, Payroll Administrator, Human Resources Administrator) provide content for these pages.

Pages requiring work before going to full production are the following:

- 'Employee News' (Interactive Employee)
- 'What's New This Year' (Interactive Employee)
- 'Information about your benefits choices' (Interactive Benefits)

New Information Pages which may be created (required)

If you are implementing the Benefits functionality, you also have the option of creating new pages detailing benefits-specific information the end users should know. No visible placeholders are delivered for these pages. However, there are delivered templates for each that can be renamed and used to create these pages. The links for these pages will not be visible unless a page has been created.

Additional pages which may be created are the following:

- 'Show me how flexible benefits are calculated and applied' (Interactive Benefits)
- 'Important instructions for this plan' (Interactive Benefits)

Existing Information Pages for review and modification (optional)

Other Information Pages are delivered with Interactive Workforce-related text which is perfectly suitable for use, but you have the option of letting someone within your company review these pages and provide new or additional content.

Pages which may contain new or additional information are the following:

- 'Employee Welcome' (Interactive Employee)
- 'Manager Welcome' (Interactive Manager)
- 'Administrator Welcome' (Interactive Employee)
- 'Show me how it works if I have more than once Direct Deposit' (Interactive Employee)
- 'Important Information about benefits enrollment' (Interactive Benefits)
- 'About the Enrollment Process' (Interactive Benefits)

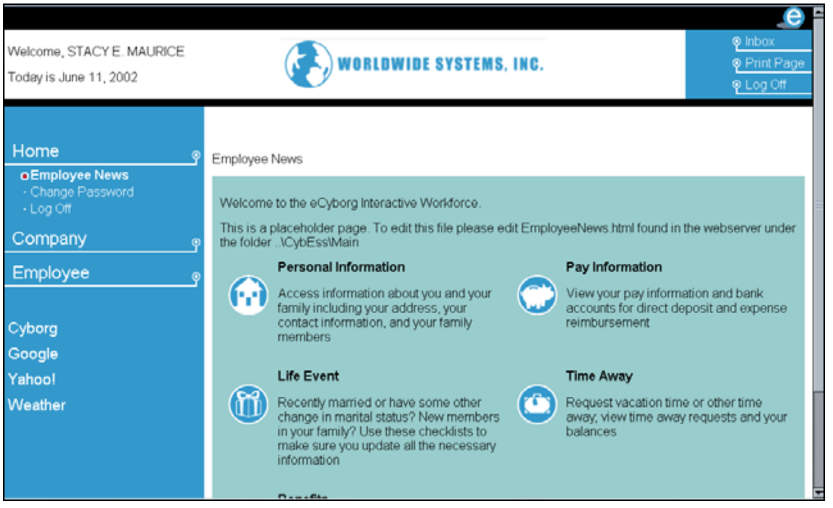
Interactive Employee Information Pages

These pages are included with Interactive Employee functionality.

The 'Employee News' Information Page (required)

The 'Employee News' Information Page can be used to provide any current information and news that your company wishes to highlight to employees. This page should be updated regularly with the latest information.

The Interactive Workforce Administrator should read the page and determine if the sample text reflects what the company wants to present. If not, they should then edit the sample or write new text appropriate to the company needs. They should then give this text to you to include on the Information page.

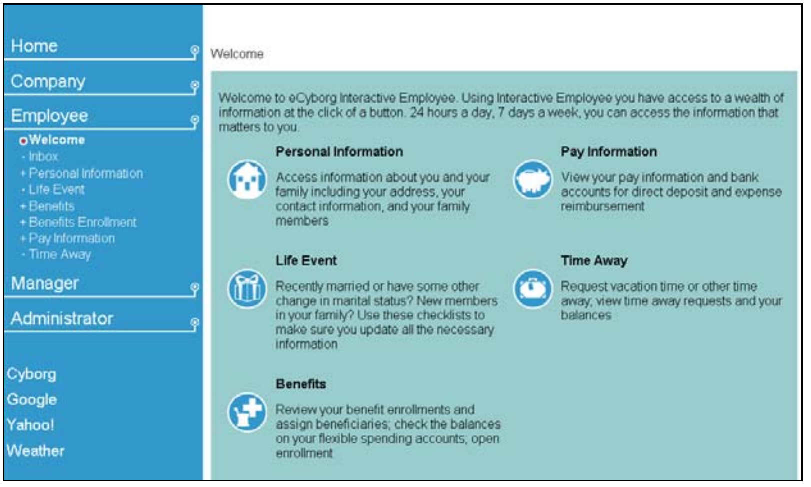


Accessed from the Navigator:
Home ▶ Employee News

To change this page, edit the following file:
..\Inetpub\wwwroot\CyborgESS\main\EmployeeNews.html

The 'Employee Welcome' Information Page (optional)

The 'Employee Welcome' Information Page is used to provide the employee with the functionality available through Interactive Workforce. The Interactive Workforce Administrator should read the page and determine if the sample text reflects what the company wants to present. If not, they should then edit the sample or write new text appropriate to company needs. They should then give this text to you to include on the Information page.



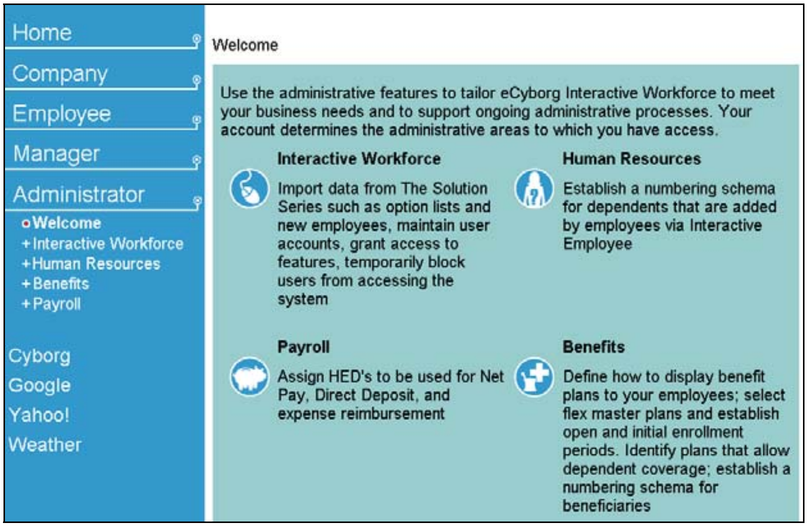
Accessed from the Navigator:
Employee ► Welcome

To change this page, edit the following file:
..\Inetpub\wwwroot\CyborgESS\main\EmployeeWelcome.html

The 'Administrator Welcome' Information Page (optional)

The 'Administrator Welcome' Information Page provides an overview of administrative functionality available through Interactive Workforce. This page will appear only to users with Administrator access.

The Interactive Workforce Administrator should read the page and determine if the sample text reflects what the company wants to present. If not, they should then edit the sample or write new text appropriate to the company needs. They should then give this text to you to include on the Information page.



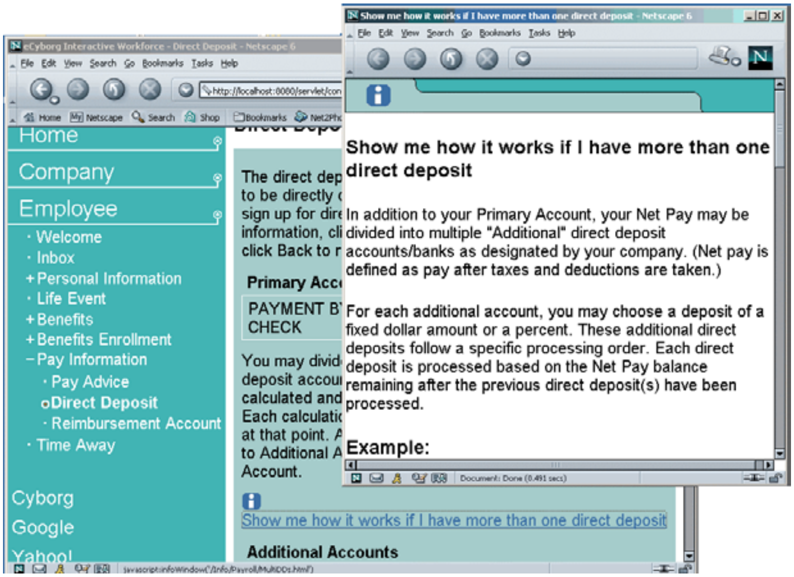
Accessed from the Navigator:
Manager ▶ Welcome

To change this page, edit the following file:
..\Inetpub\wwwroot\CyborgESS\main\AdministratorWelcome.html

The 'Show me how it works if I have more than one direct deposit' Information Page (optional)

The 'Show me how it works if I have more than one direct deposit' page explains to an Interactive Workforce user how your company deals with multiple direct deposits within the system. Sample text appears on this page, and should be reviewed and edited as per your company needs by the Payroll Administrator. This Information link is part of the Interactive Workforce Essential installation, but the link displays only if your organization allows more than one direct deposit account.

This page will appear only for those employees who are set up for more than one direct deposit account.



Accessed from the Navigator:
Employee ▶ Pay Information ▶ Direct Deposit ▶
Show me how it works if I have more than one direct deposit

To change this page, edit the following file:
..\Inetpub\wwwroot\Info\Payroll\MultiDDs.html

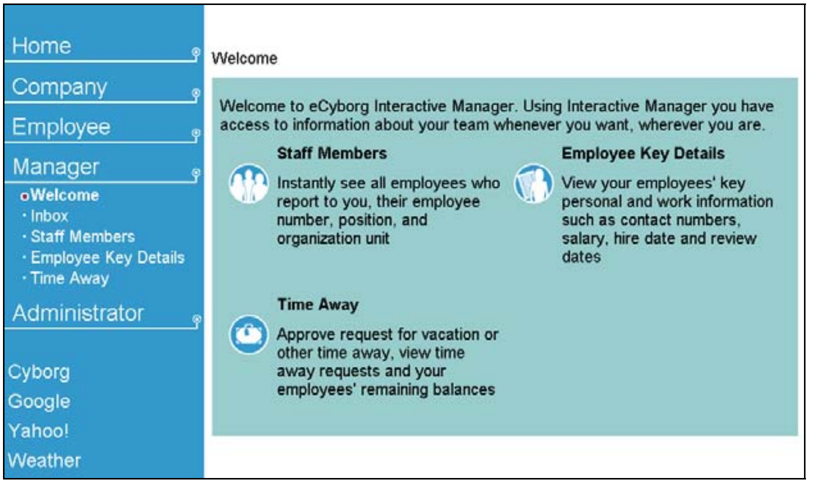
Interactive Manager Information Pages

The following page is part of the Interactive Manager functionality. If this functionality has been purchased, the page will appear only to users with Manager access.

The 'Manager Welcome' Information Page (optional)

The 'Manager Welcome' Information Page provides an overview of management functionality available through Interactive Workforce.

The Interactive Workforce Administrator should read the page and determine if the sample text reflects what the company wants to present. If not, they should then edit the sample or write new text appropriate to the company needs. They should then give this text to you to include on the Information page.



Accessed from the Navigator:
Manager ▶ Welcome

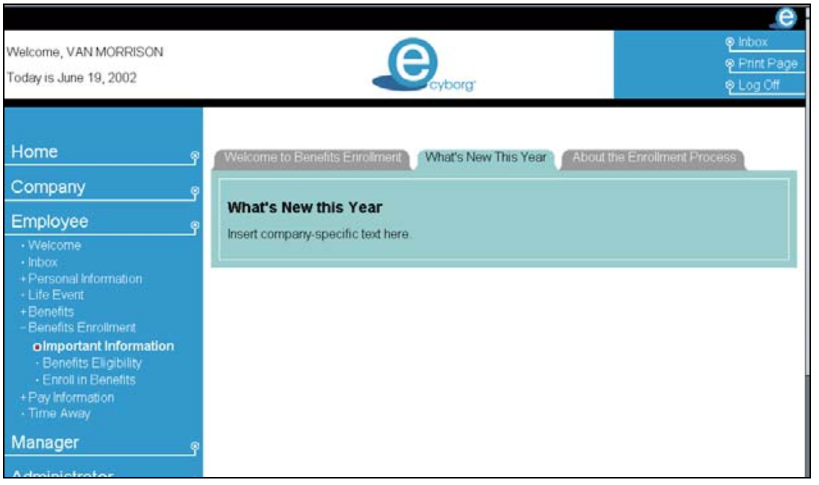
To change this page, edit the following file:
..\Inetpub\wwwroot\CyborgESS\main\ManagerWelcome.html

Interactive Benefits Information Pages

The following pages are part of Interactive Benefits functionality, and are available only if that functionality has been implemented.

The 'What's New This Year' Information Page (required)

The 'What's New This Year' page can be used to inform Interactive Workforce users about changes made to available benefits programs. No sample text appears on this page, and text should be supplied by the Benefits Administrator. The link to this page only appears when Benefits is installed.



Accessed from the Navigator:
Employee ▶ Benefits ▶ Benefits Enrollment ▶ Important Information ▶ What's New This Year

To change this page, edit the following file:
..\Inetpub\wwwroot\Info\Benefits\OpenNewInfo.html

The 'Show me how flexible benefits are calculated and applied' Information Page (required)

You must create one of these pages for each Flex Master Plan that has been set up in The Solution Series. As delivered, none of these pages exist in Interactive Workforce. A template is supplied which may be copied, renamed using a specified convention, and edited with the correct information for a specific Flex Master Plan. The link to this page only appears when Benefits is installed.

Accessed from the Navigator:
Employee ► Benefits Enrollment ► Benefits Eligibility ►
Show me how flexible benefits credits are calculated and applied

Also accessible from the following pages:
Benefits Enrollment Summary
Confirm Costs

To create this page, do the following:

The Benefits Administrator should create a list of all flex master plans, providing descriptions of each one. Use this information to create the required .html files. A separate .html file must be created for each plan.

A sample template can be found in the following filepath:

..\Inetpub\wwwroot\Info\Benefits\MstrFlxCrdSample.html

When you rename the copy, the following convention must be used to specify the flex master plan:

MstrFlxCrd<control number>_<master id>_<master effective (yyyymmdd)>.html

as in the following example:

MstrFlxCrd3000_600_20010101.html

Using a text editor, add the flex master plan description provided by the Benefits Administrator to the file and format.

The 'Important instructions for this plan' Information Page (required)

You must create one of these pages for every benefit plan that has a variable amount in The Solution Series. As delivered, none of these pages exist in Interactive Workforce. A template is supplied which may be copied, renamed under a specific convention, and edited with the correct information for a specific benefit plan having a variable amount. This information must be supplied by the Benefits Administrator. The link to this page only appear when Benefits is installed.

Accessed from the Navigator:
Employee ▶ Benefits Enrollment ▶ Benefits Eligibility ▶ Important instructions for this plan

To create this page, do the following:

The Benefits Administrator should create a list of all benefits plans which contain variable amounts, providing descriptions of each one. Use this information to create the required .html files. A separate .html file must be created for each plan.

The sample template can be found in the following filepath:

\Inetpub\wwwroot\Info\Benefits\PlnVarAmtSample.html

To work properly, the following filename convention must be used:

PlnVarAmt<control number>_<master id>_<flex master effective (yyyymmdd)>.html

as in the following example:

PlnVarAmt2000_601_20010101.html

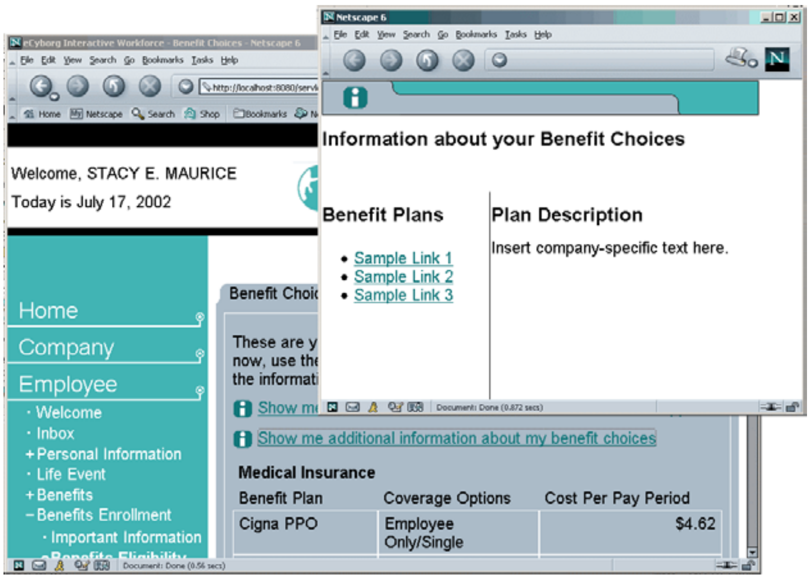
Using a text editor, add the benefit plan/variable amount description provided by the Benefits Administrator to the file and format.

The 'Information about your Benefit Choices' Information Page (required)

The 'Information about your benefits choices' page can be used to inform Interactive Workforce users about each benefits program. It is set up as a two-frame page: a comprehensive list of benefit plan names is in the left frame, each one calling up information on that particular plan in the right frame. The link to this page only appears when Benefits is installed.

No sample text appears on this page, and text should be supplied by the Benefits Administrator.

The sample page appears as shown here:



Accessed from the Navigator:

Employee ▶ Benefits Enrollment ▶ Benefits Eligibility ▶ Show me additional information about my benefits choices

Editing the 'Information about your Benefits Choices' Information Page

The Benefits Administrator should provide you with the following:

- A complete list of names of benefits offered by the company
- Descriptions of each of these benefits

Using the benefits description information provided by the Benefits Administrator, create a separate Plan Description .html file for each benefit. When naming the file, it is recommended that you use the benefit name. The Plan Description file contains the text which is pulled into the frame on the right of the page, thus displaying the plan description for the selected benefit plan in the left frame.

Plan Description files should be stored in the following directory:

..\Inetpub\wwwroot\Info\Benefits

Following is a sample Plan Description file:

```
<html>
<head></head>
<body>
<h2>Plan Description</h2>
<p>Insert company-specific text here.
</body>
</html>
```

The Benefits Plan link appears in the frame on the left of the page, and is a link which pulls the text from the corresponding Plan Description .html file for display in the frame on the right. The link should use the name of the benefit.

When adding a link, you may use the following format:

```
<li><a href="sample1.html" target="targetlinks">Sample Link 1</a>
```

Where 'Sample Link 1' would be the name of the Benefit Plan. The link would be added to the following file (sample links are shown in bold):

..\Inetpub\wwwroot\Info\Benefits\LinkSample.html

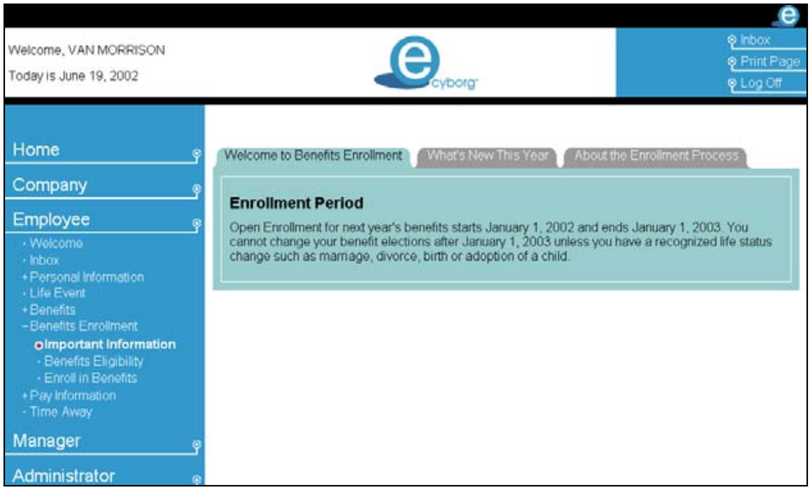
which is used to create the list in the Benefits Plans frame on the left. The file is shown here:

```
<html>
<head> ... </head>
<h3><center>Benefit Plans</center></h3>
<ul>
<li><a href="sample1.html" target="targetlinks">Sample Link 1</a>
<li><a href="sample2.html" target="targetlinks">Sample Link 2</a>
<li><a href="sample3.html" target="targetlinks">Sample Link 3</a>
</ul>
</html>
```

The 'Important Information about Benefits enrollment' Information Page (optional)

The 'Important Information about Benefits Enrollment' page can be used to explain information the employees need to know regarding benefits enrollment. Sample text appears on this page, and should be reviewed and edited as per your company needs by the Benefits Administrator.

The default page is shown here:

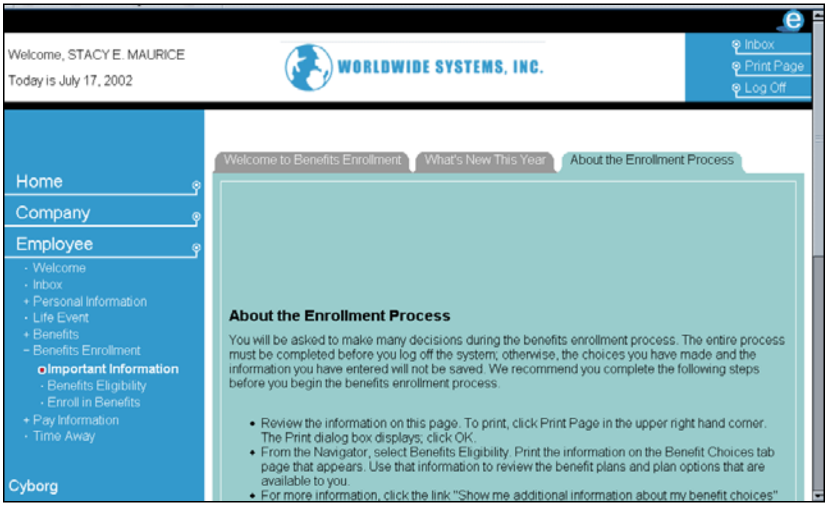


To access from the Navigator:
Employee ▶ Benefits ▶ Benefits Enrollment ▶ Important Information

To change this page, edit the following file:
..\Inetpub\wwwroot\Info\Benefits\Enrollment\InitialInfoNeeded.html

The 'About the Enrollment Process' Information Page (optional)

The 'About the Enrollment Process' can be used to explain the process, for users who may be new to the system. The page appears as a tab on the Important Information page, as shown here. The Benefits Administrator should review the text provided on the default page, and approve or supply new text to modify the page.



To access from the Navigator:

Employee ▶ Benefits ▶ Benefits Enrollment ▶ Important Information ▶ About the Enrollment Process

To change this page, edit the following file:

..\Inetpub\wwwroot\Info\Benefits\Enrollment\OpenInfoNeeded.html

Maintaining the Client

This section lists some issues regarding the maintenance of client machines.

Accessing Interactive Workforce through a browser

Since Interactive Workforce is run through the intranet, any machine on the network can access the Interactive Workforce log in page using the following URL:

http://*hostname*/CyborgESS

where *hostname* is the name of the Web Application Server computer. Or, with multiple environments, the URL would use the following format:

http://*hostname:port*/CyborgESS

where *port* is the port number where the specific environment is accessed.

Accessing Interactive Workforce from a Kiosk

Some companies may decide to allow access to Interactive Workforce using a client set up at a kiosk available to all employees. For such installations, we recommend using Internet Explorer set up in Kiosk mode.

In Kiosk mode, the title bar, menus, toolbars, and status bar are shut off—the web page alone will be displayed. Thus, the only navigation available will be through the web page. This creates a more secure system by preventing the amount of tampering by restricting the amount of access an employee user has.

☞ *Refer to* **Accessing Interactive Workforce in Kiosk mode from a client** *(on page 102) for more information on setting up Internet Explorer in Kiosk mode.*

Apply the Concept
Will your company be installing Interactive Workforce in a kiosk?

Adobe Acrobat Reader

Adobe Acrobat must be installed on the client machine, for the Tax Forms available through Interactive Workforce to work. If the Acrobat Reader is not installed on the machine, it can be downloaded from the Adobe web site (www.adobe.com).

Important! To ensure that the Acrobat Reader works properly on the client machine, it must always be installed after the browser. If the client machine should receive an upgraded browser, then Acrobat Reader should be re-installed.

Secure Socket Layer (SSL)

Human Resources data is extremely sensitive and confidential. Therefore, it should always be handled with extreme care. In a non-secure system, unauthorized users may tamper with or destroy employee data. Hackers might break in to a system and steal employee data, such as Social Security Numbers, for illegal purposes.

To protect confidential information, Interactive Workforce has been installed with Secure Socket Layers (SSL). Since SSL has been implemented at installation, there is nothing you need to do—but SSL is described here in brief to help you understand this part of the system.

The Secure Sockets Layer protocol provides secure communication between web browsers and web application servers. This is the approach used today in e-commerce to establish encrypted communication for customers to safely submit information such as credit card numbers over the Internet.

The most common use of SSL is in assuring confidential communications between client and server over the Internet. SSL provides a range of security services for client/server sessions, including:

1. **Server authentication:** This proves to the originator that he or she is actually communicating with the intended Web site, and not an imposter site posing as that Web site to fraudulently gather confidential information.
2. **Client authentication:** This service authenticates to the server that the client is who he or she claims to be, protecting the business from fraudulent users.
3. **Keep private communications private:** Data transferred between the client and server is encrypted, preventing someone (who might be trapping the data as it is being sent) from viewing that information.
4. **Prevent tampering:** Data items transferred are protected against attempts to modify data before it reaches its destination.
5. **Assure confidentiality:** Users are assured that no unauthorized entity has access to the information being shared at the Web site. This protects sensitive information such as account numbers or credit card numbers against eavesdroppers.

SSL is provided with Interactive Workforce installation. However, depending on your organization's needs, you may acquire and install a third party Server Certificate.

☞ *Refer to Installing and Configuring Interactive Workforce for more information.*

Apply the Concept
How does the Secure Socket Layer serve to protect your system?

Detailed Directions

This section provides detailed instructions for the tasks described in this chapter.

Tasks

Accessing Interactive Workforce in Kiosk mode from a client

With Internet Explorer, Kiosk mode can be used to run Interactive Workforce from any machine on the network. It is recommended for Kiosk installations.

1. **Access the Run dialog**

   From the NT desktop, make the following selections:

   Start ▶ Run

2. **Open the Interactive Workforce log in page using the kiosk switch**

   In the Run dialog box, type the following:

   iexplore -k //*hostname*/CyborgESS

   CyborgESS is the name of the page that will be run in Kiosk mode. If you are using multiple environments, be sure to include the port for the desired environment.

Note *To shut down Interactive Workforce running in Kiosk mode, type Ctrl-W.*

Review of Questions Answered

1. What does the Secure Socket Layer (SSL) provide for the system?

2. How should Interactive Workforce be accessed when set up at a kiosk?

3. Why does Interactive Workforce require Adobe Acrobat Reader?

4. How do I maintain tax forms in Interactive Workforce?

5. What are information links, and why should they be tailored for the company?

CHAPTER 5

Data Load of the Interactive Workforce Database

In This Chapter

Data Load of the Interactive Workforce database

This section covers what you need to know about the Interactive Workforce database.

On all platforms, the Web Application Server is run on Windows machine, so all of the concepts and tasks in this chapter are in Windows, but apply to installations on all supported platforms.

Tasks

This section explains the following:

- Updating Interactive Workforce database User Profiles
- Listing Login IDs and Initial Passwords
- Changing the SQL password for the Interactive Workforce database

Questions answered

The following questions are answered in this section:

1. What is the Interactive Workforce database? What does it contain?
2. How is the Interactive Workforce database updated? How often should this be done?
3. How can I create a list of login names and initial passwords to distribute to employee users?

The Interactive Workforce Database

The Interactive Workforce stores security information for user access, as well as other data. The system utilizes this local database so that it does not have to query The Solution Series database for configuration-type information, thus ensuring that network traffic is kept to a minimum. It also contains information which is applicable only to Interactive Workforce.

Information stored in the Interactive Workforce database

This database contains the following information:

- User Profiles
- Option Lists
- Functional Administration data (Interactive Workforce, HR, Payroll, and Benefits)

Note *The structure of the Interactive Workforce database is created during installation. At this time, the Initial Administrator and other data for functional administration are created.*

User Profiles

User Profiles contain information relating to a user's access right to Interactive Workforce. Each employee must have the following to obtain access:

- Satisfy employee selection criteria
- A User ID
- A password

☞ *Refer to* **Basic Customizations to Interactive Workforce** *(on page 159) and Technical Administration of The Solution Series for more information on modifying the extract scripts.*

User ID

The system creates a User ID for each employee in The Solution Series that meets the selection criteria established in Interactive Workforce Administration. The delivered system uses the Employee Number in The Solution Series as the User ID. It is possible to modify user extract script to use a different field for this User ID, for example Employee Last Name.

Password

The extract and load process also creates a randomly generated unique initial password for each valid user. This process can be customized to create an alternative password and to control the password length, such as one based on social security numbers.

An employee user can only be given a User ID and initial password by using the extract and load process. This means that it is vital that this process is followed on a regular basis to allow new employees access, or existing employees who must satisfy a modified selection criteria. We will discuss the scheduling of the extract and load process in more detail later in this section.

Apply the Concept
As delivered, what does a User Profile consist of?

Option Lists

All relevant option lists (codesets) are extracted and stored in the Interactive Workforce database. This is done by initiating a STAPI call using the Extract Option List page in the Interactive Workforce Administration functionality. Option lists can be extracted at anytime. The extract should be performed whenever they change in The Solution Series.

☞ *Refer to eCyborg Interactive Workforce: The Administrator's Guide for more information on updating Option Lists.*

Functional Administration Data

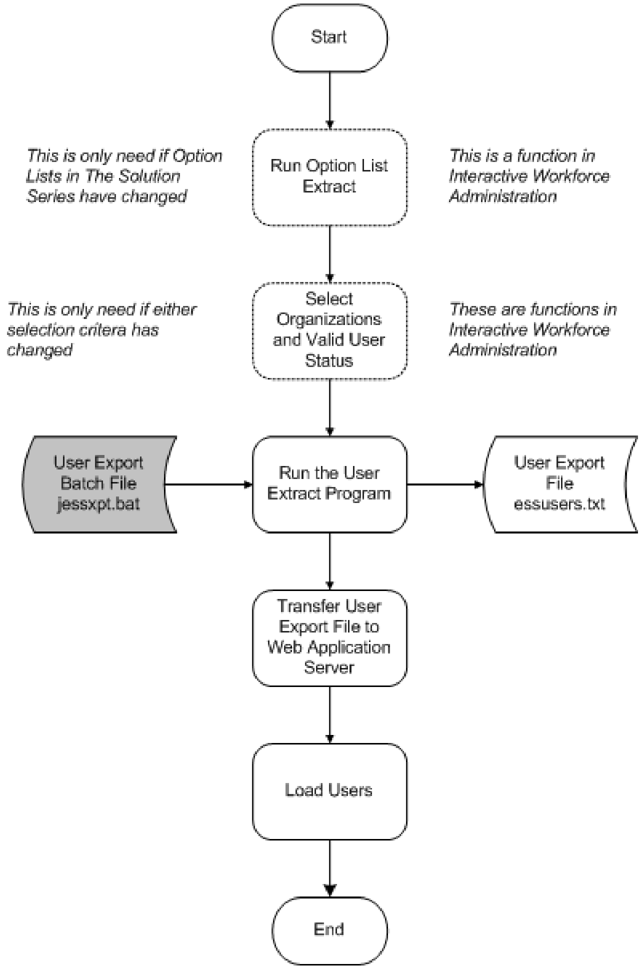
Data specific to Interactive Workforce, which does not reside in The Solution Series, is created primarily in the Interactive Workforce Administration Functionality. Some data is also created as part of the initial extract and load process.

Maintaining Employee Users in the Interactive Workforce database

There are two key maintenance tasks necessary to keep the Interactive Workforce database up to date. They are:

- Updating valid users
- Updating option lists (performed as part of Interactive Workforce Administration Functionality)

The following diagram details the update process for the Interactive Workforce database:



The Interactive Workforce database scripts

The following table lists the different scripts for the Interactive Workforce database and their application:

To perform this action…	Run the following utility…
create the Interactive Workforce database	CreateEssDb.bat
extract data text files from The Administrative Solution	Jessxpt.bat
update User Profiles	LoadUsers.bat
migrate for upgrade	essMigrate.sql

CreateEssDb.bat

The installer runs this script to create the Interactive Workforce database. This reads information from the Interactive Workforce database configuration file, EssDb.cfg, and creates the Interactive Workforce database.

Jessxpt.bat

This file is a function of The Solution Series. It is run in order to extract the required information from the Employee database in The Solution Series. It stores this information in the EssUsers.txt file

In a typical two-server configuration, the Jessxpt.bat file is located in the \Runs directory of the The Solution Series installation:

..\Runs\Jessxpt

LoadUsers.bat

This script loads the EssUsers.txt file into the Interactive Workforce database.

In a typical two-server configuration, the LoadUsers.bat file is located on the Web Application Server. The file should be located in an environment-dependent file path similar to the following example:

..\eCyborg\IW\ESSDatabase\e*nvironment*\LoadUsers.bat

Apply the Concept

What two scripts are used to create and update Interactive Workforce users? What script is used to create the Interactive Workforce database?

User Profile extract modification options

The Jessxpt.bat and LoadUsers.bat scripts can be modified in a couple different ways. The modifications include:

- Login IDs. Jessxpt.bat can be modified to use a specified piece of data as the Login ID, such as an employee's last name.
- Passwords. Jessxpt.bat can be modified to use a specified piece of data as a user's password, such as their social security number.

The following fields are extracted by the Jessxpt.bat program. Any of these fields could be used as criteria for the Login ID or Initial Password.

- EMPLOYEE-NUMBER
- EMP-FIRST-NAME
- EMP-MIDDLE-NAME
- EMP-LAST-NAME
- RESULTING-EMP-STATUS
- CONTROL-3-CODE
- CONTROL-4-CODE
- CONTROL-5-CODE
- CONTROL-6-CODE
- CTRL-THREE
- CTRL-FOUR
- CTRL-FIVE
- CTRL-SIX
- PAY-FREQUENCY-CODE
- UNION-CODE
- EMPLOYMENT-DATE
- JOB-CODE/EI-ROLE
- JOB-CODE-EXTENT
- FLSA-CLASS
- Initial Password (custom field)
- Login Name (custom field)
- EOL Indicator

☞ *Refer to* **Basic Customizations to Interactive Workforce** *(on page 159) and Technical Administration of The Solution Series for more information on modifying the extract scripts.*

Interactive Workforce database sizing

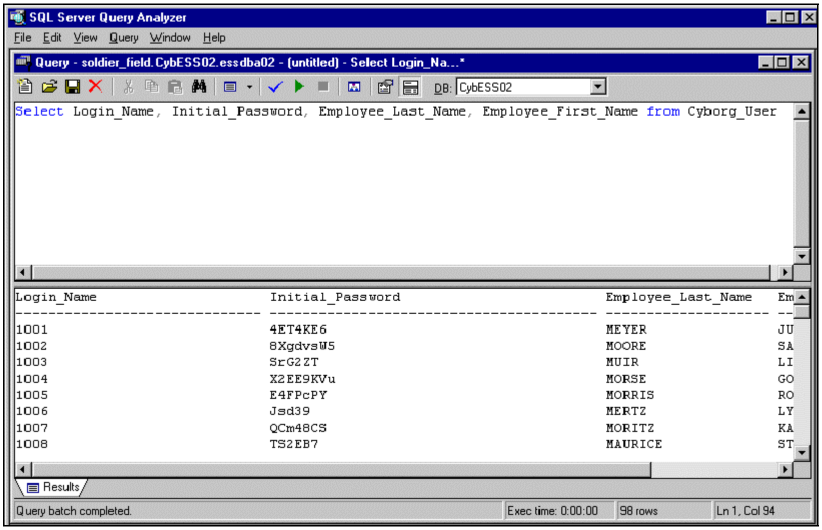
The Interactive Workforce database has been sized to 200 MB at install. This should provide a stable system for 1 or 2 years for a company of less than 30,000 employees. For companies with more than 30,000 employees, you can reconfigure the DBSIZE parameter, adding 2 MB for every 5,000 employees above 30,000.

Listing Login IDs and initial passwords

> **Important!** As the nature of the information that can be accessed via Interactive Workforce is confidential, it is important that an employee password is treated with the same security as a Personal Identification Number (PIN) for a credit or bank card. Employees can change their password at anytime using Interactive Workforce.

When Interactive Workforce is first implemented, the Login IDs and initial passwords must be distributed to each user. The actual responsibility and choice of method of distribution is up to the Interactive Workforce Administrator. However, they may approach you to produce a list of all Login IDs and initial passwords for them to distribute.

One way you can produce this list is by doing a query using the SQL Enterprise Manager. When queried, the Enterprise Manager will list the information, as in the example shown here:

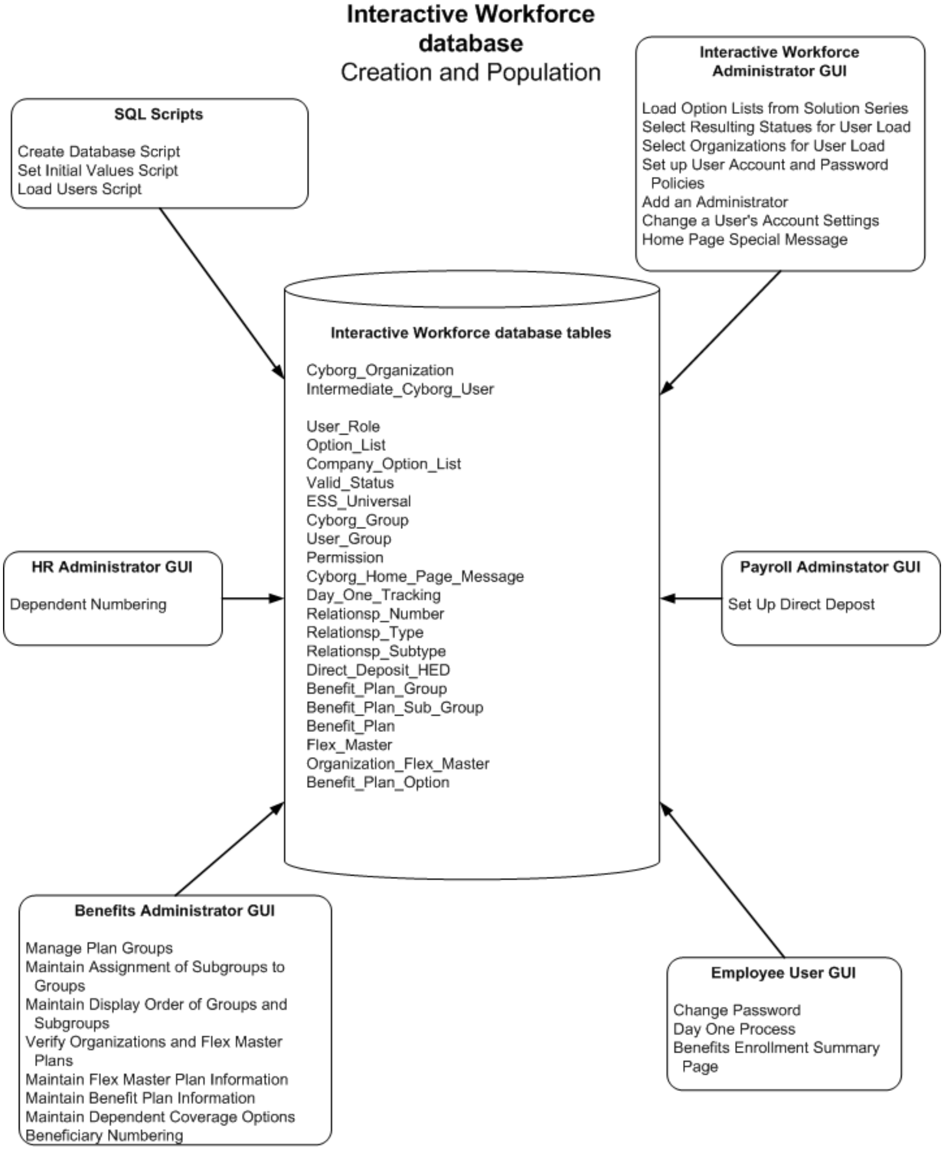


This shows the Login ID (Login_Name), initial password, and employee name. You can then pass this information on to the Interactive Workforce Administrator, who can then distribute the information to the employees.

The Login ID is the same number as the Employee ID in The Solution Series, because this information is taken directly from The Solution Series when you run the Extract Utility. The initial password is generated by Interactive Workforce for each Login ID. When an employee logs on for the first time, they will be prompted to change their password in order to ensure the security of their own Interactive Workforce account. The employee-defined password is encrypted.

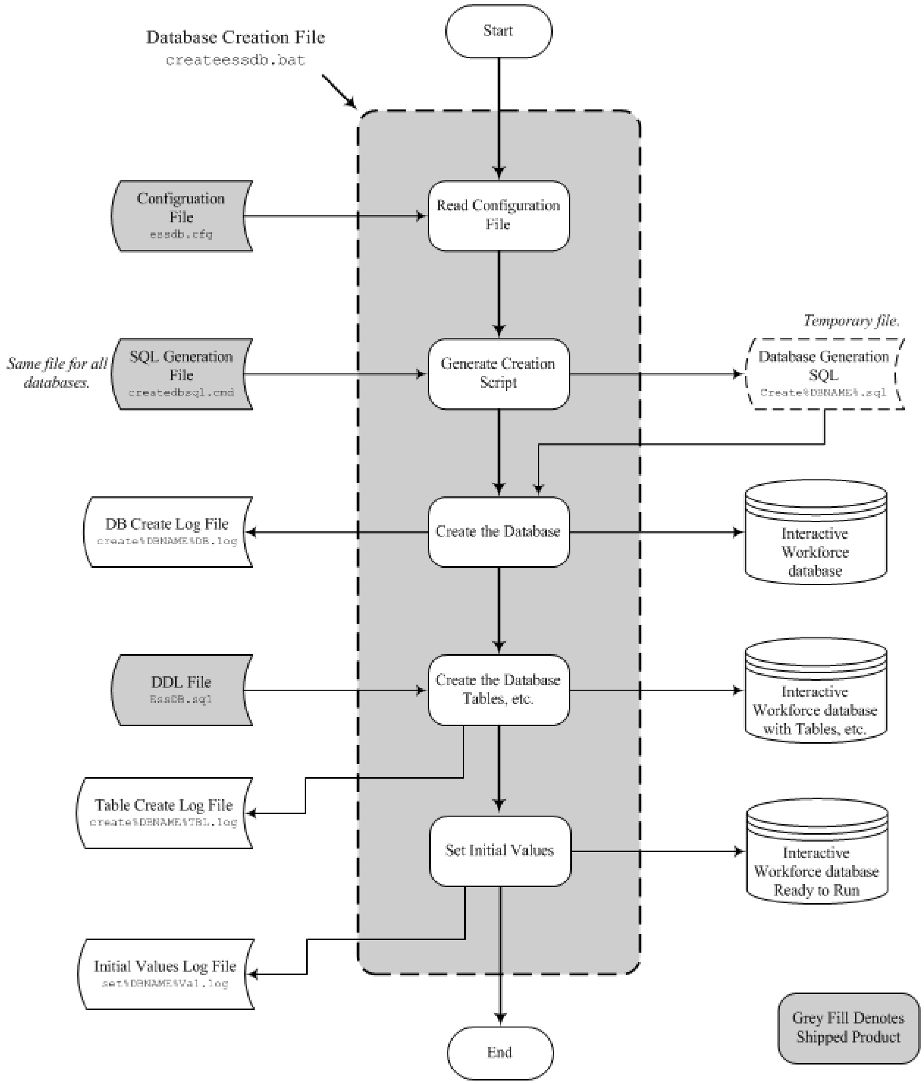
Where does the data come from?

The diagram below illustrates the tables in Interactive Workforce database and the sources of the data that create and populate these database tables:



Creation of the Interactive Workforce database

During the installation, the Interactive Workforce database is created and populated. This is achieved using scripts you may need to maintain the database. The process model below shows in detail the stages of the process and the files involved.



CreateEssDb.bat

The installer runs this script to create the Interactive Workforce database. This reads information from the Interactive Workforce database configuration file, EssDb.cfg, and creates the Interactive Workforce database.

Initial Administrator

You can see from the diagram that the last stage is 'Set Initial Values'—as part of this stage, the Initial Administrator User ID and password is created so that an administrator can access Interactive Workforce. The Initial Administrator User ID has full access rights to all administration functionality, including the ability to create other administrators.

There are two key tasks performed within the Interactive Workforce Administration functionality before the data load for the Interactive Workforce database can be completed. These are:

- Load option lists
- Select valid organizations and employee statuses for the data load

These can be performed by someone logging on to Interactive Workforce using the initial administrator User ID and password, or by any other Interactive Workforce administrator who has been granted access to the Interactive Workforce Administration functionality.

Apply the Concept
What is the purpose of the Initial Administrator User ID?

Loading option list

To load the relevant option lists, an administrator must log on to the Interactive Workforce Admin page and access the Extract Option Lists page. Simply by clicking the button a STAPI call is initiated and the relevant option list data is extracted from The Solution Series and loaded into the Interactive Workforce database. You must refresh the Option List data in Interactive Workforce whenever one has been modified in The Solution Series to keep the two systems synchronous.

☞ *Refer to eCyborg Interactive Workforce: The Administrator's Guide for more information on the Interactive Workforce Administration functionality.*

Selecting valid organizations and employee statuses

Before the data necessary to create the employee profiles can be loaded, the valid organizations and valid employee statuses must be selected. This data is used by the LoadUser.bat script in creation of employee User IDs and passwords. This is also done by selecting settings on Interactive Workforce administration pages in the Interactive Workforce Administration functionality.

Apply the Concept
What Interactive Workforce Functional Administration tasks must be done before users can be created?

☞ *Refer to Functional Administration of Interactive Workforce for more information on selecting valid organizations and user statuses using the Interactive Workforce Administration functionality.*

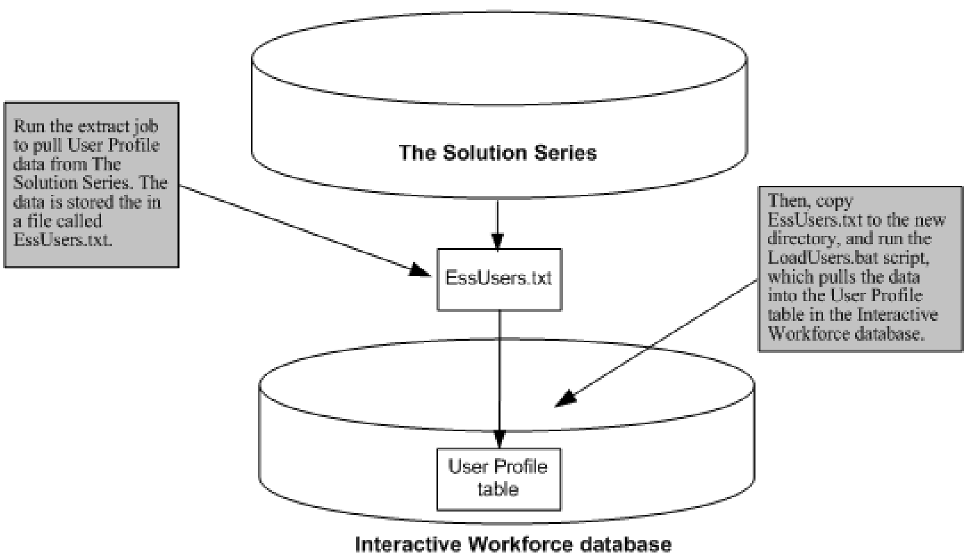
Extracting and loading users

The only way to create employee users of Interactive Workforce is to run the extract and load user process. This is done using files:

- Jessxpt.bat
- LoadUsers.bat

The process to extract and load users is as follows:

1. Run the extract program Jessxpt.bat to extract the required data from The Solution Series. The data is written to the EssUser.txt file.
2. Manually transfer the EssUsers.txt file to a directory accessible by the LoadUsers.bat script.
3. Run the LoadUsers.bat script to load the user data from the text file into the Interactive Workforce database.



☞ *Refer to Updating Interactive Workforce database User Profiles for more information on performing this task.*

Default expiration values are created during the database creation process. They are:

- 90 days for initial passwords
- 30 days for unused accounts

If you want to set alternative account expiration periods this can be done in the Interactive Workforce Administration functionality before the extract and load.

☞ *Refer to eCyborg Interactive Workforce: The Administrator's Guide for more information on setting up expiration periods using the Interactive Workforce Administration functionality.*

This completes the population of the Interactive Workforce database. Now let us look in detail at the extract and load user process as this is something you may want to customize.

Detailed Directions

This section provides detailed instructions for the tasks described in this section.

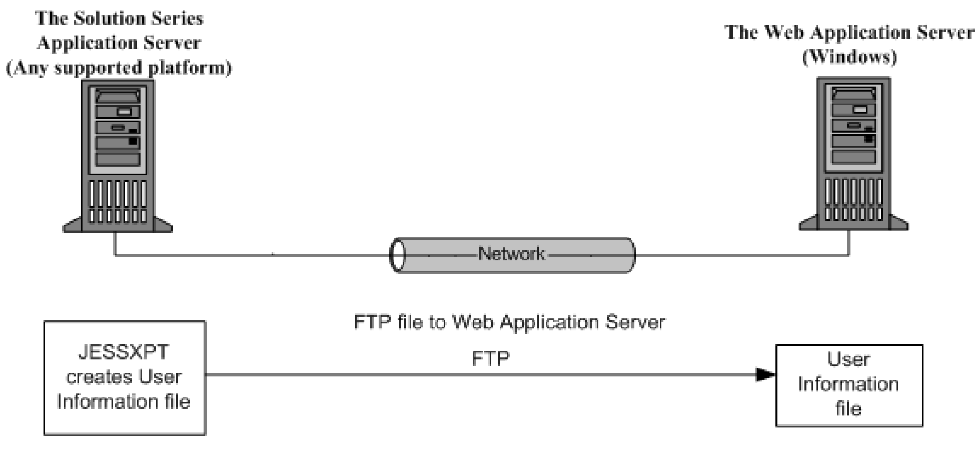
Tasks

Updating Interactive Workforce database User Profiles

Before performing this task, you should shut down Interactive Workforce. Also, before this process can initially be run, the following steps must be completed in the Interactive Workforce Administration functionality:

- Select valid employee statuses
- Select valid organizations

Loading the Interactive Workforce database requires that you extract the user information from the Employee Database (FILE02) on the The Solution Series Application Server, then transfer the resulting data file to the Web Application Server to be imported into the Interactive Workforce database. The illustration here demonstrates:



1. Execute the Interactive Workforce User Extract Job used: JESSXPT

The first part of this process is performed on the The Solution Series Application Server.

This file can be run at the Command line prompt, or by double-clicking on the filename using the Windows Explorer. It can be found in the following location:

Platform	Server	Location
Windows	Solution Series App Server	...\runs\jessxpt.bat
UNIX	Solution Series App Server	[Cyborg_Home]/runs/jessxpt
OS/390	Solution Series App Server	?HLQ?.JCL.CNTL.JESSXPT
AS/400	Solution Series App Server	CBSVF/JESSXPT
*On all platforms, the Web Application Server is always run in Windows.		

This script will extract the User Profile data required by the Interactive Workforce database, then store that data in the EssUser.txt file, which it creates in the \data directory of the The Solution Series environment.

2. Copy the EssUser.txt file to the Web Application Server

Before the information can be loaded into the Interactive Workforce database, the EssUser.txt file must be copied from the following location on the The Solution Series Application Server:

Platform	Server	Location
Windows	Solution Series App Server	...\data\EssUsers.txt
UNIX	Solution Series App Server	[Cyborg_Home]/data/EssUsers.txt
OS/390	Solution Series App Server	?HLQ?.ESSUSER
AS/400	Solution Series App Server	CBSVF/ESSUSR
*On all platforms, the Web Application Server is always run in Windows.		

and moved to the following directory on the Web Application Server:

...\eCyborg\IW\EssDatabase*environment*\

Interactive Workforce user data file in OS/390 and AS/400

For OS/390 and AS/400 systems, you will need to change the name of the Interactive Workforce User data file to ‘EssUser.txt’. You can do this during the data transfer by executing the ftp with the following command line:

```
ftp> get ESSUSR EssUsers.txt
```

3. Shut down Interactive Workforce

To block users from accessing Interactive Workforce while updating the Interactive Workforce database, you should shut down the system.

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59).*

4. Execute the Load Users script

Now that the EssUser.txt file is in the same directory as the Load Users script, you may run the script to import the data from the text file to the Interactive Workforce database. This is also done on the Web Application Server.

This file can be run at the Command line prompt, or by double-clicking on the filename using the Windows Explorer. It should be located in an environment directory similar to the following file path:

...\eCyborg\IW\Essdatabase*environment*\LoadUsers

Once this is complete, the User Profile data in the Interactive Workforce database has been updated.

5. Restart Interactive Workforce

To allow users access to Interactive Workforce once the update is complete, you must restart the system.

☞ *Refer to* **Starting Interactive Workforce** *(on page 70)*.

Listing Login IDs and Initial Passwords

To generate a list of Login IDs with their initial passwords, you will need to use the SQL Query Tool on the Web Application Server.

1. Execute the SQL Query Analyzer

Make the following selections:

Start ► Programs ► Microsoft SQL Server 2000 ► SQL Query Analyzer

2. Select the Interactive Workforce database

In the DB: field of the SQL Query Tool, select the Interactive Workforce database. The database name should reflect the environment, for example:

CybIW

> **Important!** Remember to log in to the Query Analyzer using the login for the correct database. Use the following login: Cybiwdba

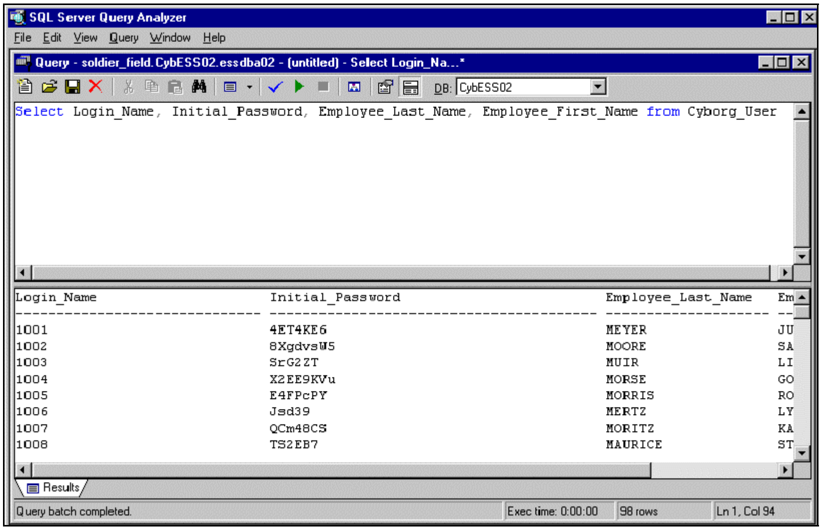
3. Enter the query commands

In the Query entry field, type in the following command line:

Select Login_Name, Initial_Password, Employee_First_Name, Employee_Last_Name from Cyborg_User

4. Execute the query

In order to execute the query entered in the Query entry field, click on the Execute Query button on the SQL Query Tool. Once this is executed, the tool will take a few moments to pull up the data, then display it in the window. The window will appear as shown here:



5. Print the results and distribute to users

The method you choose for distribution should somehow account for the confidentiality with which passwords and User IDs should be treated.

Change the SQL password for either the Interactive Workforce or Pay Information database (Windows only)

This task is performed on the Web Application Server.

Changing the SQL Server password

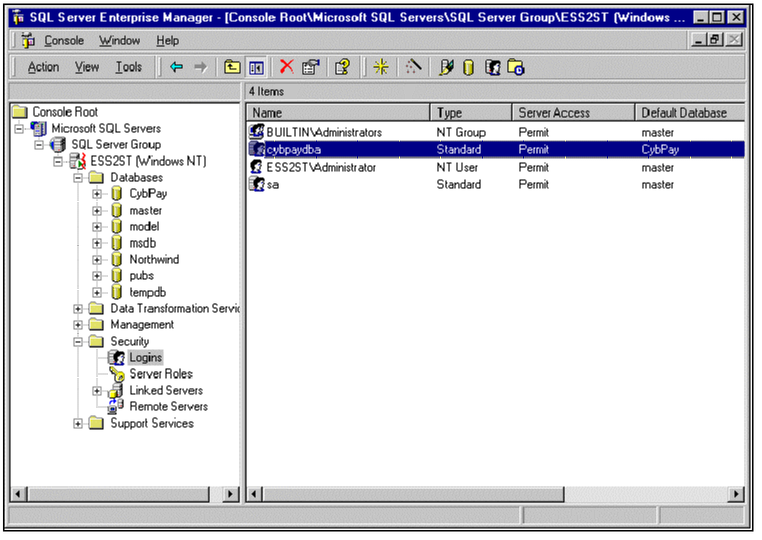
The first part of this task shows you how to change the SQL Server password.

1. Launch the SQL Enterprise Manager

To launch the SQL Enterprise Manager, please make the following selections:

Start ▶ Programs ▶ Microsoft SQL Server 2000 ▶ Enterprise Manager

The SQL Server Enterprise Manager window will appear:

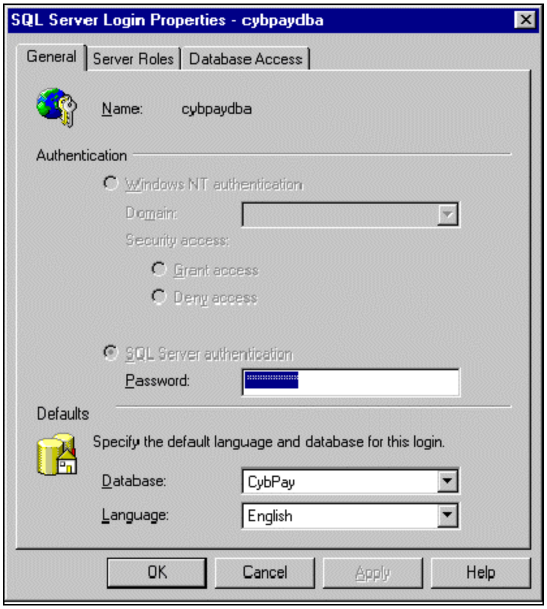


2. In the Navigator on the left, expand the Security directory

Expand the directories until you find the Security directory.

3. **Click Logins**
4. **Select the desired Login name**
5. **Right click, then select Properties**

The SQL Server Login Properties dialog will appear:



6. **In the SQL Server Authentication Password field, type in a new password**
7. **Click Apply**

The Confirm New Password dialog appears:

8. **Type in the new password to confirm**
9. **Click OK**

This will confirm and change the new password. You may close the SQL Server Enterprise Manager at this time.

Reconfiguring the database properties with the new password

The second part of this task details how to edit the database properties file with the new password, so that the system will start each database using the correct password.

1. Start the Properties Editor

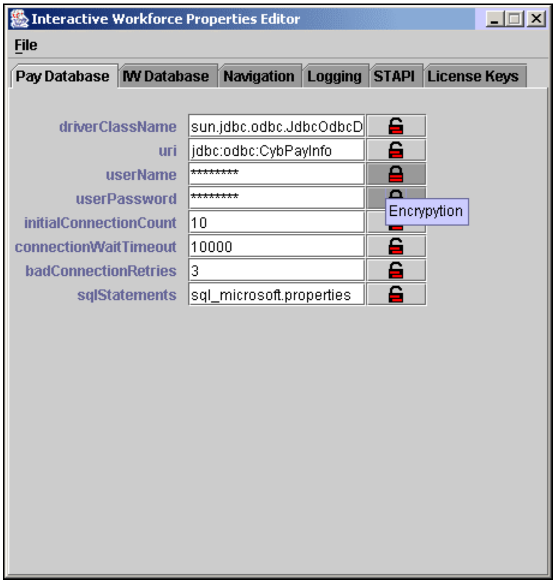
To start the Properties Editor, open a Command Prompt and go to the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*

where *environment* is the name of the ServletExec instance for that environment, then execute the following command string:

PropertiesEditor ess.properties

The configuration utility appears.



2. Select the IW Database tab

Click on the IW Database tab in order to display the parameters for that database.

3. Edit the userPassword parameter

Change userPassword to the new password.

4. Save the changes

To save your changes, make the following selections from the Properties Editor dialog:

File ▶ Save

Review of Questions Answered

1. What is the Interactive Workforce database? What does it contain?

2. How is the Interactive Workforce database updated? How often should this be done?

3. How can I create a list of login names and initial passwords to distribute to employee users?

CHAPTER 6

Payroll Run Changes

In This Chapter

Payroll Run Changes

In order to properly integrate Interactive Workforce and The Solution Series, there are modifications that need to be performed regarding payroll runs. The two primary reasons for these modifications are:

- The STAPI must be suspended during payroll runs.
- The Pay Information database must be updated using data extracted by Interactive Workforce Report Generators that are tied in with the payroll run.

These modifications are made to the following scripts:

- jpayxtr
- jpayrun
- jmntrun
- jpaymrg

The Solution Series comes with these modified jobs. However, the modified lines are remarked out, so these remarks must be removed from the files when implementing Interactive Workforce.

These delivered files can be used for payroll runs. However, if your implementation uses customized payroll run scripts, then you may need to copy these modified lines from the delivered files and paste them into your customized payroll run scripts.

This section discusses the changes to the payroll run, why these modifications are necessary and how to modify your custom payroll scripts. It also discusses some issues that may arise while performing payroll runs with these new modifications.

Tasks

This section explains the following tasks. The tasks on modifications are only necessary if you have custom payroll scripts.

- Setting up the Interactive Workforce Payrun (7L7L) Report Generator in The Solution Series
- Setting up the Interactive Workforce Payslip (7M7M) Report Generator in The Solution Series
- Executing the Interactive Workforce Is/Was Audit Report
- Suspending the STAPI for a Payroll Run
- Modifying pay merge and extract scripts with SuspendStapi (Windows only)

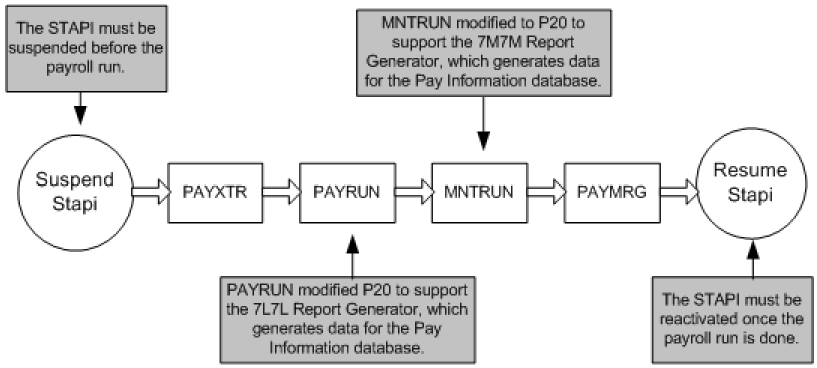
Questions answered

The following questions are answered in this section:

1. What are audit reports, and when do they need to be run?
2. Will access to Interactive Workforce be available during a payroll run?
3. What modifications have been made to the payroll run scripts in order to fully integrate Interactive Workforce with The Solution Series?

Overview of the payroll run changes

The following illustration demonstrates how the payroll run has changed to support Interactive Workforce:



Once the payroll has been run there is also an additional step to update the Pay Information database with the data that has been generated by the 7L7L and 7M7M Report Generators. This is achieved by running the ImpPayInfo.bat script that pulls the data into the database.

Apply the Concept
When must the STAPI be suspended and resumed?

☞ *Refer to* **Data Load of the Interactive Workforce Database** *(on page 105) and* **Data Load of the Pay Information Database** *(on page 145) for detailed directions on this additional step in the payrun process.*

☞ *Refer to the Payroll Processing Technical documentation for more information on Payroll Runs.*

Note: *Pay Information Database should be updated only after the final payroll run is complete.*

Suspending STAPI operation

During a payroll run, you need to use the SuspendStapi utility, delivered as part of Interactive Workforce, to halt operations of the STAPI so that users who are logged on cannot make changes to their data while the payroll run process programs are being run. If the STAPI is not suspended while payroll run programs are being run, their changes will be lost. The Suspend utility is designed to ensure data integrity and system stability.

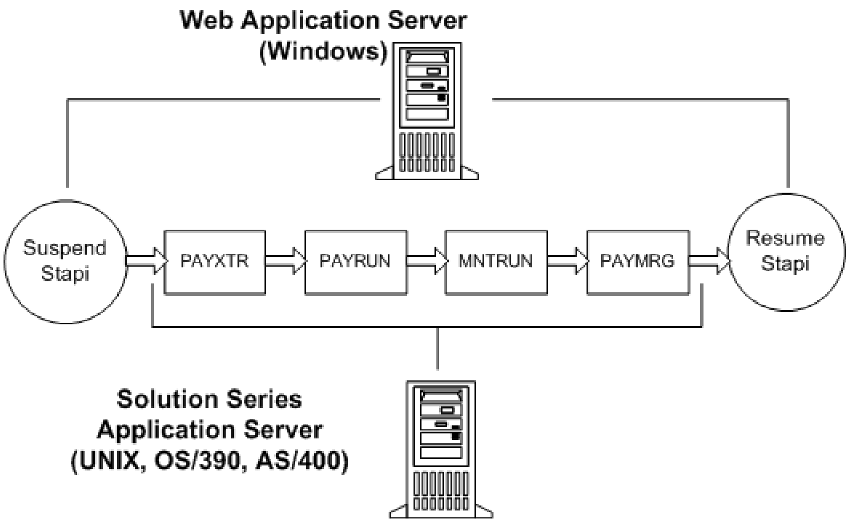
When the SuspendStapi Utility is switched on, no new user sessions are allowed. Any current user sessions are allowed to finish any query that was started before the utility was switched on. However, no new queries can be started once the Suspend Utility is switched on. Any attempted access results in a message saying, 'The system is currently unavailable. Please try again later.' Once the SuspendStapi Utility is switched off, normal operation will resume.

Suspending the STAPI operation is a manual process, performed by running the SuspendStapi.bat utility prior to running the payroll run. Resuming the STAPI operation ia also a manual process, performed by running the ResumeStapi.bat utility once the payroll run is complete.

Suspend/Resume STAPI on UNIX, OS/390, and AS/400 platforms

Because the STAPI resides on a different machine, the Windows-based Web Application Server, than the payroll run jobs for UNIX, OS/390, and AS/400 systems, the STAPI must be suspended then resumed as part of the manual process of running the payroll runs jobs.

The illustration below shows the payroll run with the Suspend/Resume STAPI utilities starting and ending the process. It shows which files are on the Windows-based Web Application Server and the The Administrative Solution Application Server (Solaris, AIX, OS/390, or AS/400).



Suspend/Resume STAPI on Windows platforms

In Windows systems, it is possible to automate the Suspend/Resume STAPI by including it as part of the payroll run jobs. In order to implement this, two scripts have to be modified: the pay extract and pay merge jobs. These scripts are used to create a sequential master from your online Employee database in The Solution Series, then create a new online Employee Database from the sequential master. They are run for normal pay cycles. Simply add lines to run the StopStapi utility to the beginning of the payroll extract job, and add lines to run the ResumeStapi utility to the end of the pay merge job.

When Interactive Workforce is first installed, it includes new pay extract and pay merge scripts containing modifications to integrate Interactive Workforce with The Solution Series. These scripts are:

Job	Modification	Location
jpayxtr	Runs suspendStapi utility to stop operations	\runs
jpaymrg	Runs resumeStapi utility to restart operations	\runs

Modifications to pay extract and pay merge programs

When you implement Interactive Workforce you will have to uncomment the lines of code in `jpayxtr` and `jpaymrg` to activate the suspend and resume STAPI utilities.

If you have custom pay extract and pay merge programs the SuspendStapi Utility must be added to the jobs that run the pay extract and merge. Since every installation of The Solution Series is unique, this documentation shows you the lines you need to add to the script. This documentation also includes printouts of these scripts to help you determine where the modifications belong in your organization's scripts.

☞ *Refer to* **Modifying pay merge and extract scripts with SuspenStapi (Windows only** *(see "Modifying pay merge and extract scripts with SuspendStapi (Windows only)" on page 141)) for more information.*

Apply the Concept

What are the names of the pay extract and pay merge scripts in your implementation? What is the filepath where they are stored?

New Report Generators

Note *If your company is not using the Pay Functionality of Interactive Workforce, you do not make these changes.*

When Interactive Workforce is first installed on the The Solution Series Application Server, two new Report Generators are added: 7L7L and 7M7M. These two Report Generators generate text files which are used to create and update the Pay Information database.

- Jpayrun—This job must be modified produces the ESSEER, ESSEDR, and ESSTXR files output by the 7L7L Report Generator used to update the Basic, HED, and Tax tables in the Pay Information database.
- Jmntrun—This job must be modified to produce the ESSPSR file output by the 7M7M Report Generator used to update the Employee information data table in the Pay Information database.

Each of these reports must also be setup up in The Solution Series in order to run properly. This is done on the Report Requests form (DD-SCR) (DD-SCR). Before you can run the payroll run, you will need to load 7L7L and 7M7M into the P20IN file.

Important!

As the number of paychecks issued in a given payroll run increases, the system may run out of disk space. When this occurs, a payroll run may have one of the following problems:

- P4CALC or P5PRNT may stop on some transaction.
- The SORT step may stop between P4CALC and P5PRNT

If either situation occurs and no one can isolate the problem or increase disk space before paychecks are due, you may be asked to shut off some report generators and perform the payroll run in order to cut the paychecks. If the Interactive Workforce Payrun or Payslip Report Generators are among those, then the files required for updating the Pay Information database will not be generated. You will need to perform another payroll run with these Report Generators on in order to create those files.

Apply the Concept

What new Report Generators are delivered for Interactive Workforce?

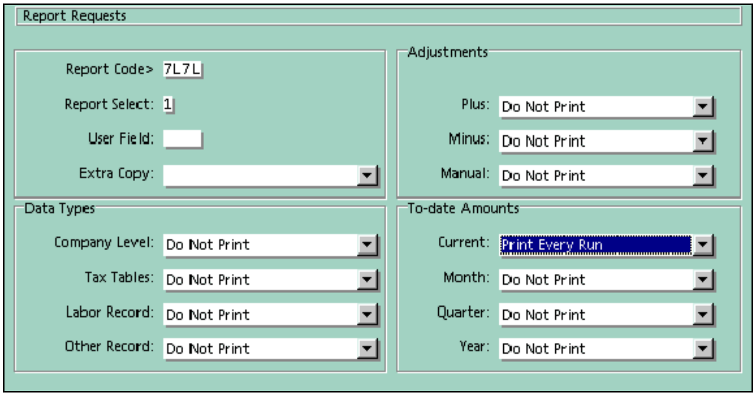
Pay Run (7L7L) Report Generator

In order to generate the ESSEER, ESSEDR, and ESSTXR files during a payrun, the 7L7L generator must be loaded into your P20IN file using the desired company(ies).

The Payrun Report Generator should be configured as follows on the Report Requests (DD-SCR) form:

- The Report Code field must be set to '7L7L'
- The Report Select field must be set to '1'
- All of the Data Types fields must be set to 'Do Not Print'
- All of the Adjustments fields must be set to 'Do Not Print'
- The Current field, in the To-Date Amount box, must be set to 'Print Every Run'
- The To-Date Amount fields Month, Quarter, and Year must be set to 'Do Not Print'

Once the above values are entered into the Report Requests (DD-SCR) form press enter to load the values into your The Solution Series system.



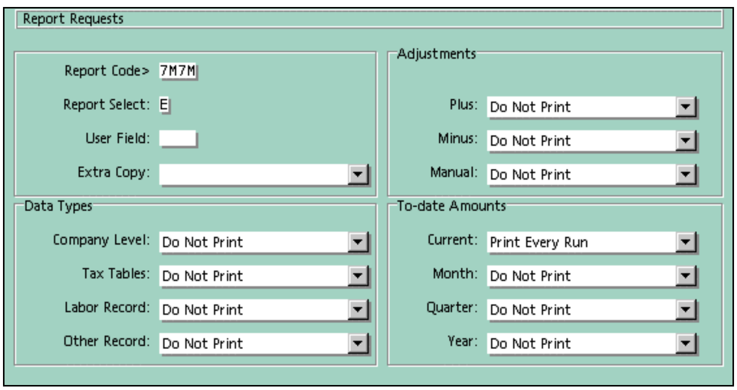
Payslip (7M7M) Report Generator

In order to generate the ESSPSR file during a payrun, the 7M7M generator must be loaded into your P20IN file.

The Payslip Report Generator should be configured as follows on the Report Requests (DD-SCR) form:

- The Report Code field must be set to '7M7M'
- The Report Select field must be set to 'E'
- All of the Data Types fields must be set to 'Do Not Print'
- All of the Adjustments fields must be set to 'Do Not Print'
- The Current field, in the To-Date Amount box, must be set to 'Print Every Run'
- The To-Date Amount fields Month, Quarter, and Year must be set to 'Do Not Print'

Once the above values are entered into the Report Requests (DD-SCR) form press enter to load the values into your The Solution Series system.



Maintenance Run script modifications

Column 19 or later of the P4 transaction, used by P4CALC, in the `jmntrun` script needs the same alphabetic character that was used in the Report Select field on the Report

Requests form (DD-SCR), in order to force the 7M7M generator to execute. In our example, that is the letter 'E'. This change will be permanent. If column 19 of the P4CALC is already being used to select other report generators, then you will need to review the Payroll System documentation and analyze if you can change this.

> **Important!** If you run a Maintenance Run any time other than immediately after a full payroll run, then you should use a different script modified to use a different alphabetic character. In the example above, that would be any alphabetic character other than 'E'.

p5prnt changes

The `p5prnt` overrides are to added to the client's current override file.

The Interactive Workforce Is/Was Audit Report

As employees add and change information through Interactive Workforce, you can create audit records of these changes using the Interactive Workforce Is/Was audit report. Before initiating payroll processing, you may wish to print this audit report for verification of your changes and the resulting new information.

The Interactive Workforce Is/Was audit report prints a line showing is and was information for each field that has been changed through Interactive Workforce. Pages with multiple entry lines are printed in form-image format.

The Is/Was audit report has been designed to report on changes made via all Interactive Workforce pages. However, it can be modified to report on specific pages.

☞ *Refer to the Payroll Processing Technical documentation for information on performing the payroll run.*

> **Important!** You can execute the audit report program at any time during the payroll process. However, you *must* produce the report before beginning the JPAYMRG process, at which time all previous audit records are deleted.

Using the Interactive Workforce Is/Was Audit Report

In a typical two-server installation, the Is/Was audit report script can be found in the \Runs directory of the The Solution Series installation. For example:

..\Runs\Jiswase

By default, this report will generate a list of all changes made through all The Solution Series forms that have been affected by Interactive Workforce. You can modify the job to report on specific forms, in order to pinpoint more directly the information required.

In order to modify the job to report on a single form, open the batch file in a text editor and edit the ISWASE entry on the fourth line to include the name of the specific form, as shown here:

P ISWASXJ00100 ISWASE **02-SCR** > ..**\work\ISWASE.04**

The first bold characters indicates where you should add the name of the desired form. The second bold characters indicate the filepath where the text file containing the output of the report will be saved.

If the entry at position 31 is ALL or left blank, then the report will print all forms entered. You will need to create copies of the `jiwase` script for each form you wish to run. You may also want to add a delete statement at the beginning of the job to delete the `iswas.15` file prior to the first CBSVB execution. The jobstream for this report should be based on the jobstream for the Is/Was report.

Apply the Concept

Is there any specific information or The Solution Series form that your company would like audited for Interactive Workforce changes?

Modifications to the Payrun and Maintenance Run jobs

Note *If your company is not using the Pay Functionality of Interactive Workforce, do not make these changes.*

The `payrun` and `mntrun` scripts have to be modified to support the 7L7L and 7M7M Report Generators added to the payroll run, and to allow these reports access to the Employee Database (FILE02). The Report Generators are not affected by the scripts, but the output file definition has been added. This allows for the automatic generation of the text files used to populate and update the Pay Information database.

There are model payrun and maintenance run jobs supplied with Interactive Workforce which you can use for payroll run, or as a model for modifying your own customized payroll runs jobs for use with Interactive Workforce. The model jobs are listed in the following table:

Platform	Server	Job and Location
Windows NT	Solution Series App Server	**Payrun job:** ..\Runs\jpayrun.bat **Maintenance Run job:** ..\Runs\jmntrun.bat
UNIX	Solution Series App Server	**Payrun job:** [Cyborg Home]/runs/jpayrun **Maintenance Run job:** [Cyborg Home]/runs/jmntrun
OS/390	Solution Series App Server	**Payrun job:** ?HLQ?.JCL.CNTL.JESSPYRN **Maintenance Run job:** ?HLQ?.JCL.CNTL.JESSMTRN
AS/400	Solution Series App Server	**Payrun job:** CBSVP/JESSPYRN **Maintenance Run job:** CBSVP/JESSMTRN

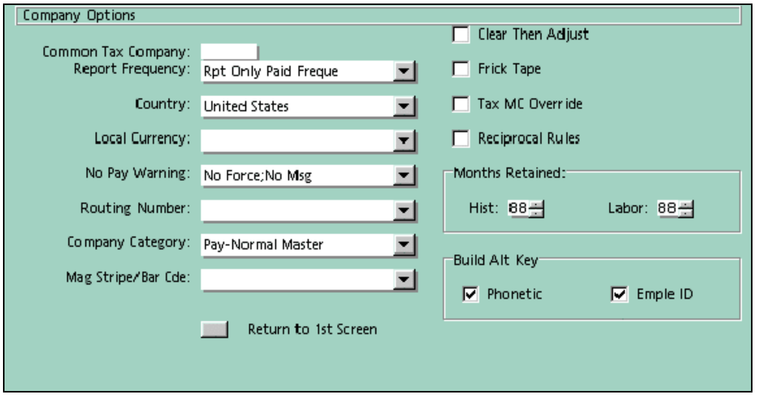
Apply the Concept
What are the names of the payrun and mntrun scripts in your implementation?
What is the filepath where they are stored?

Company Options in The Solution Series

In order to ensure that the system is set up correctly for the payroll run, you will need to configure the Months Retained settings on the Company Options form (AF-SCR) (AF-SCR) in The Solution Series to '88'. When set correctly to '88', the system will retain the records needed for the Pay Information database. If these parameters are set to anything other than '88', the Interactive Workforce Payroll Report Generators will not work properly.

Important! Do not use the batch purge option during a payroll run when you are producing paychecks. Any purge of these records needs to be performed as a batch process run separately from the payroll run.

The Company Options form (AF-SCR) is used to define organization parameters. These parameters serve as the default options for this organization and all employees within the organization. This form is split into two halves. The first defines the Bank Code and FSLA methods. Once the required information on this half is entered, The Solution Series takes you to the second half, which is shown here:



Detailed Directions

This section provides detailed instructions for the tasks summarized in this section.

Tasks

Setting up the Interactive Workforce Payrun (7L7L) Report Generator in The Solution Series

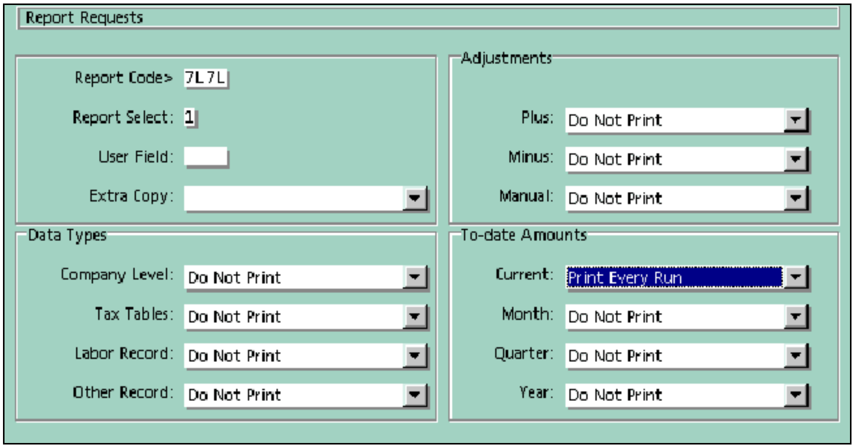
☞ *Refer to New Report Generators for more information on this new RG and what it does.*

This task shows you how to set up the 7L7L Report Generator.

1. **Login to The Solution Series**
   Once you have logged in The Solution Series desktop appears.
2. **Access the Report Requests form (DD-SCR)**
   From the main menu of the The Solution Series desktop, make the following selections:

   Tools ▶ Reporting ▶ Report Scheduling ▶ Schedule Payroll Run Reports

   The Report Requests form (DD-SCR) appears.
3. **In the Report Code field, type 7L7L**
4. **Set the Report Select field to '1'**
5. **Set the Data Types Other Record field to 'Do Not Print'**
6. **Set the To-date Amounts Current field to 'Print Every Run'**
7. **Press Enter**
   The form should look similar to the following example:



Setting up the Interactive Workforce Payslip (7M7M) Report Generator in The Solution Series

☞ *Refer to New Report Generators for more information on this new RG and what it does.*

1. **Login to The Solution Series**
   Once you have logged in The Solution Series desktop appears.

2. **Access the Report Requests form (DD-SCR)**
   From the main menu of the The Solution Series desktop, make the following selections:

   Tools ▶ Reporting ▶ Report Scheduling ▶ Schedule Payroll Run Reports

   The Report Requests form (DD-SCR) appears.

3. **In the Report Code field, type 7M7M**

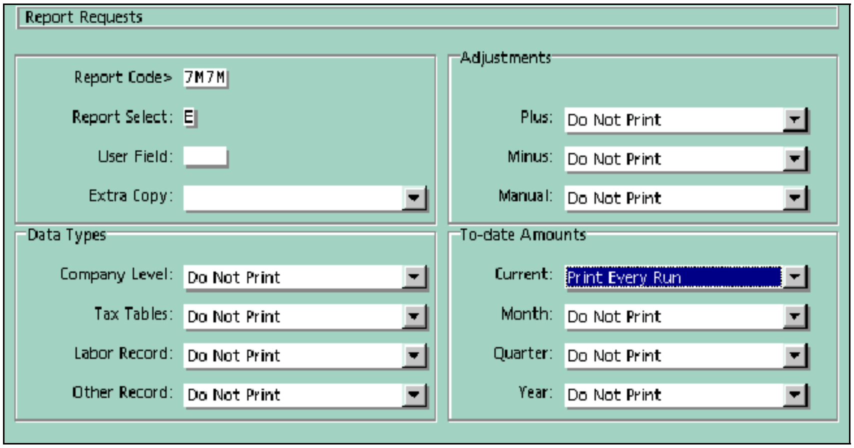
4. **Type any alphabetic character in the Reports Select field**
   It is recommended that you use an 'E'.

5. Set the Data Types Other Record field to 'Do Not Print'

6. Set the To-date Amounts Current field to 'Print Every Run'

7. Press Enter

The form should look similar to the following example:



The Solution Series has now been configured for both the 7L7L and 7M7M Reports Generators. You may now close the The Solution Series desktop.

Executing the Interactive Workforce Is/Was Audit Report

☞ *Refer to The Interactive Workforce Is/Was Audit Report for more information on this new Interactive Workforce specific audit report and how you can tailor it.*

Execute the Interactive Workforce Is/Was

After `jiswase` is executed, the output is put in the following location:

Platform	Server	Job and Location	Output
Windows	Solution Series App Server	..\Runs\jiswase	..\Work\iswasp.03
UNIX	Solution Series App Server	[Cyborg Home]/runs/jiswase	[Cyborg Home] /work/iswasp.03
OS/390	Solution Series App Server	?HLQ?.JCL.CNTL.JESSISWE	FILE03 SYSOUT
AS/400	Solution Series App Server	CBSVP/JISWASE	QPRINT FILE03

Suspending the STAPI for a Payroll Run (UNIX, OS/390, AS/400)

For Solaris, AIX, OS/390, and AS/400 systems, the suspend and resume STAPI must be manually executed before and after the payroll run, because the STAPI is located on a different machine than the payroll run jobs. These steps are performed on the Windows-based Web Application Server machine by manually running the SuspendStapi and ResumeStapi utilities.

1. Suspend STAPI operations
Job Used: SuspendStapi

Suspend the STAPI on the Windows-platform Web Application Server by running the following utility:

SuspendStapi.bat

located in the following directory:

..\eCyborg\IW\Stapi-*environment*\bin

2. Perform the payroll run

On the Solaris, AIX, OS/390, or AS/400 implementations of The Solution Series Application Server, perform the payroll run using your usual payroll run jobs.

3. Resume STAPI operations

Resume the STAPI on the Web Application Server by running the following utility:

ResumeStapi.bat

located in the following directory:

..\eCyborg\IW\Stapi-*environment*\bin

Modifying pay merge and extract scripts with SuspendStapi (Windows only)

The Solution Series comes with jobs for running pay extracts and pay merges during a payroll run. These two jobs contain modification in order to work properly with Interactive Workforce. In order to activate these modifications, you must open these jobs and remove the remark statements from the modified lines.

If you have customized pay extract and merge files, you can add the highlighted code below, removing the 'rem' statements, to your existing scripts to add the suspend and resume STAPI modifications.

To modify the jpayxtrESS and jpaymrgESS files, complete the following:

1. Open the pay extract script
Job used: jpayxtr

The `jpayxtr` script must be edited in any standard text editor.

..\Runs\jpayxtr.bat

2. Remove the Remark statements from the modified lines

Because the STAPI must be suspended before the pay extract begins, the command lines which execute SuspendStapi have been placed at the very beginning of the file. To activate the modifications, remove the '`rem`' statements at the beginning of the lines highlighted in the following example:

```
rem ECHO ********************************
rem ECHO ** SUSPENDING /STAPI for ESS **
rem ECHO ********************************
rem REM This will temporarily suspend the STAPI
rem pushd %CYBORG_HOME%\bin
rem call %CYBORG_HOME%\bin\SuspendStapi.bat
rem popd
rem ECHO ***********************
rem ECHO ** The Solution Series  **
rem ECHO ***********************
call mfsetup.bat
set COBSW=+S5
echo P PAYXTRJ09500  999999PAYXTR  ALL  > ..\work\payxtr.04
cd ..\data
ECHO ******************
ECHO JPAYXTR IN PROGRESS
ECHO CHECKING FOR FILES
ECHO ******************
```

3. Save the pay extract script

4. Open the pay merge script

Job used: jpaymrg

The `jpaymrg` script can be edited in any standard text editor. In a two-server configuration, it can be found on the The Solution Series Application Server in the `runs` directory of the The Solution Series environment.

..\Runs\jpayxtr.bat

5. Add the modification lines near the end of the file

Because the STAPI must not be resumed until the pay merge has finished, the command lines which executes ResumeStapi have been placed near the very end of the pay merge script. To activate the modifications, remove the '`rem`' statements at the beginning of the lines highlighted in the following example:

```
rem set cobanim_2=animate
rem anim2wg ..\prog\cbsvb.int
..\prog\cbsvb
copy ..\data\p20in.mnt ..\data\p20in.mrg
rem ECHO ***************************
rem ECHO ** RESUMING /STAPI FOR ESS**
rem ECHO ***************************
rem REM This will resume the STAPI
rem pushd %CYBORG_HOME%\bin
rem call %CYBORG_HOME%\bin\ResumeStapi.bat
rem popd
rem ECHO *********************
```

```
rem ECHO ** /STAPI RESUMED  **
rem ECHO *********************
ECHO *******************
ECHO JPAYMRG COMPLETED
cd ..\runs
```

6. **Save the pay merge script**

   Once you have completed these steps, the scripts will automatically suspend the STAPI, so the pay merge and extract run properly, then resume STAPI operations when the scripts are complete.

7. **Close the file**

   The modifications will now be activated for the next payroll run.

Review of Questions Answered

1. What are audit reports, and when do they need to be run?

2. Will access to Interactive Workforce be available during a payroll run?

3. What modifications have been made to the payroll run scripts in order to fully integrate Interactive Workforce with The Solution Series?

CHAPTER 7

Data Load of the Pay Information Database

In This Chapter

Data Load of the Pay Information database

This section covers what you need to know about the Pay Information database.

For each platform, the Pay Information database is located on The Solution Series Solution Series Application Server, and so the conventions this database follows will differ according to platform.

Tasks

This section explains the following:

- Updating the Pay Information database
- Changing the SQL password for the Pay Information Database (Windows only)

Questions answered

The following questions are answered in this section:

1. What is the Pay Information database? What does in contain? How is it maintained?
2. What other issues should I be aware of regarding the maintenance of the Pay Information database?

The Pay Information Database

Note *If your company is not using the Pay Functionality of Interactive Workforce, The Pay Information database will still be installed on your system. However, its functionality will be inactive.*

The Pay Information database feeds the View Pay Information History page, and contains the following data:

- Basic Pay
- Employee Data
- Earnings and Deductions
- Tax information

Apply the Concept
What does the Pay Information database contain? Why is it necessary?

Basic Pay

Basic Pay includes the following information: period start and end dates, salary information, organization country code, and check number. This information is extracted by the 7M7M Report Generator during a payroll run, and put in the database by running the Import Pay Information job.

Employee

Employee information includes data used to identify the employee: Social Security number, name prefix (Ms., Mr., Dr., and so forth), first name, middle name, last name, name suffix (Sr., Jr., and so forth), and the employee address. This information is extracted by the 7L7L Report Generator during a payroll run, and put in the database by running the Import Pay Information job.

Earnings and Deductions

Earning and deductions includes the following information: record type, HED information, current and year-to-date earnings and deductions, current hours (for hourly employees), and direct deposit bank account information. This information is extracted by the Interactive Workforce Pay Run Extract (7L7L) Report Generator during a payroll run, and put in the database by running the ImpPayInfo.bat script.

Tax information

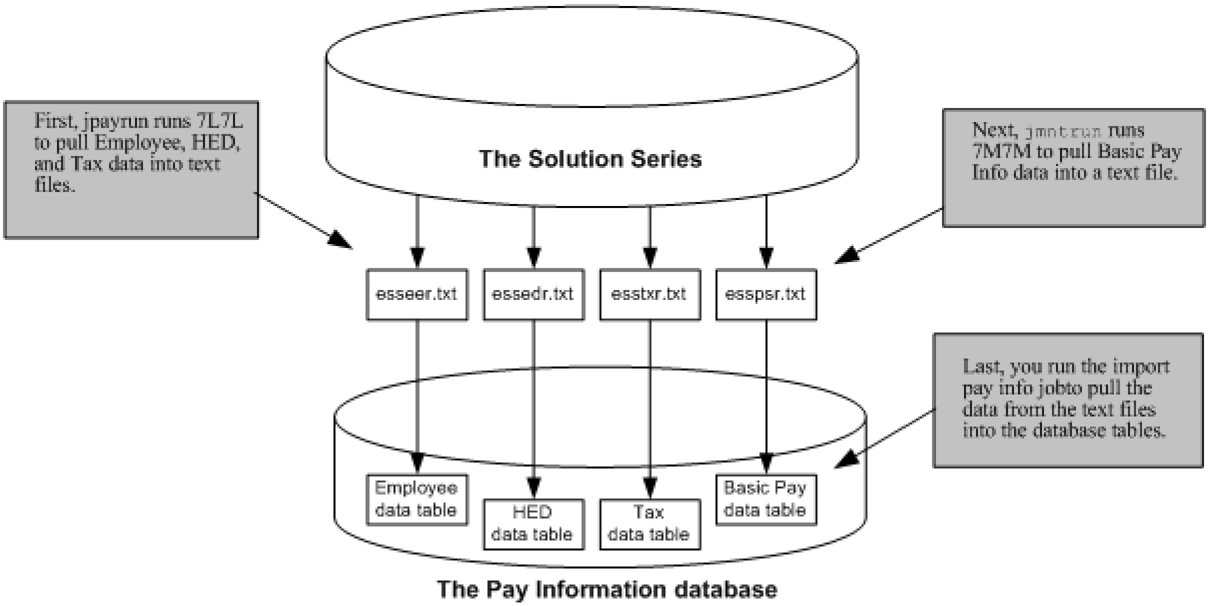
Tax includes the following information: marital status, dependents, additional tax amount, current and year-to-date withholdings, and the current and total amounts of additional withholdings. This information is extracted by the Interactive Workforce Pay Run Extract (7L7L) Report Generator during a payroll run, and put in the database by running the Import Pay Information job.

Maintaining The Pay Information database

Note *If your company is not using the Pay Functionality of Interactive Workforce, you do not require the Pay Information Database.*

The Pay Information database update occurs every payroll run, and it happens in two parts. The first part is the The Solution Series payroll run, and the second must be scheduled immediately afterwards and requires the running of script files.

First, the Interactive Workforce Pay Run Extract (7L7L) and Interactive Workforce Payslip Extract (7M7M) Report Generators of the payroll run in The Solution Series extract the required data from The Solution Series and save it in four text files, which are stored in the `data` directory of The Solution Series. These file must be copied over to the Pay Information database directory. Then, you must run the update script to pull the data from the text files into the database tables of The Pay Information database. The process is demonstrated in the following illustration:



Apply the Concept
What text files are created curing the payroll run for updating the Pay Information database? What Report Generators create these files? Where must they be copied to?

When should this be performed?

The Pay Information database needs to be updated after *every* full payroll run.

Apply the Concept
When should the Pay Information database be updated?

Will access to Interactive Workforce be available during the update?

No. The Pay Information Update should be scheduled to occur after regular working hours, to ensure that no one will want to access the system during this time. It is recommended that you block access to The Solution Series through Interactive Workforce will be allowed during this time. This is to ensure data integrity.

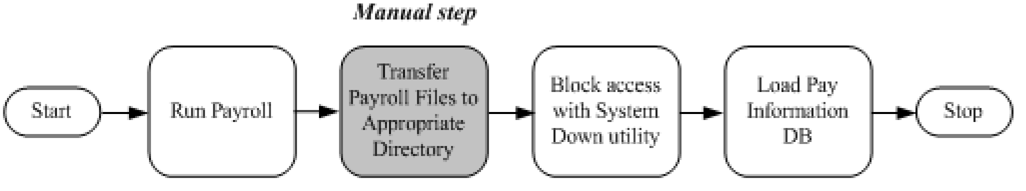
Interactive Workforce provides the Maintain Interactive Workforce page, which is accessed by the Interactive Workforce Administrator, and issues a warning to Interactive Workforce users that the system will be shutting down. This must be coordinated with the Interactive Workforce Administrator.

☞ *If you have Admin access to Interactive Workforce, refer to* **Considerations when bringing Interactive Workforce down for maintenance** *(on page 51)* *for more information.*

☞ *If you do not have Admin access to Interactive Workforce, refer to eCyborg Interactive Workforce: The Administrator's Guide for more information on the Maintain System page.*

Updating the Pay Information database process

Each time payroll has been run, the Pay Information Database must be updated with the results. The following flowchart shows the process:



☞ *Refer to* **Updating the Pay Information Database** *more detailed information.*

Checks between payroll runs

Only computer produced payments during a batch payroll run will be in the Pay Information database. Any voided checks or checks created by the online Pay Calc form or Manual Adjustments form will not be in the database. However, these voided and manual checks will be reflected in the Year-To-Date totals of the next computer produced payment in the Pay Information database.

Pay Information database sizing

The Pay Information database has also been sized to 200 MB at install. However, this database has much more growth than the Interactive Workforce database, and you can calculate your company's disk space needs using the following algorithm:

250 MB + (*blocks of 5,000 employees* * 200 * *number of months*)

Where 250 MB is the initial database size, and the system requires another 200 MB per 5,000 employees each month. Using this algorithm, a company of 15,000 employees would calculate the following for a twelve month period:

250 MB + (3 * 200 * 12) = 7.5 GB

So, a company of 15,000 breaks down to 3 groups of 5,000. Multiply that by 200 MB per 5,000, then again for a twelve month period. Finally, add 250 MB for the initial database size, and that company requires about 7.5 GB (Gigabytes) in order to maintain a year of pay information on that database.

Note *This algorithm is based on an average number of payroll runs a month.*

The Pay Information database jobs

The following lists the Pay Information database jobs and their application:

Create Pay Information database job

The installer runs this file to create The Pay Information database when the system is first installed. This file is also used to recreate the database during migration to other environments.

Create Format Files job (AS/400 only)

If your AS/400 The Solution Series database structure has modified table columns, you will need to run the `JESCOLUMNS` job to generate new format files to match the Pay Information database tables before running `JESSPROC`.

Import Pay Information job

This file is run to take the pay information data from the text files created during the payroll run, and load it into the Pay Information database. This file is invoked as part of the regularly scheduled payroll run.

Detailed Directions

This section provides detailed instructions for the tasks described in this section.

Tasks

Updating the Pay Information database

Before performing this task, you should shut down Interactive Workforce.

Updating the Pay Information is a two-step process performed entirely on the The Solution Series Application Server. The first step is done automatically when the payroll run is performed. During the payroll run, the Interactive Workforce Pay Run (7L7L) and Interactive Workforce Pay Slip (7M7M) Report Generators extract the required data from The Solution Series and store that data in a text file.

After that, you must run the ImpPayInfo.bat script in order to pull that data into the database. This file can be run at the Command line prompt, or by double-clicking on the filename using the Windows Explorer. To import the data into the Pay Information database, perform the following:

1. Copy Pay Information files from the payroll run into Pay Information database directory (Windows, UNIX, and AS/400 only)

Note *For OS/390 implementations, skip this step and continue to the next.*

During a payroll run, the Interactive Workforce Pay Run Extract (7L7L) and Interactive Workforce Payslip Extract (7M7M) create several files.

Copy the following files:

Platform	Server	Location	Pay Information Database Files

Windows	Solution Series Application Server	..\data	`esseer`
			`essedr`
			`esstxr`
			`esspsr`

UNIX	Application Server	[eCyborg_Home]/data	`esseer`
			`essedr`
			`esstxr`
			`esspsr`

AS/400	Solution Series Application Server	CBSVF	ESSEER ESSEDR ESSTXR ESSPSR

To the Pay Information database directory of the desired environment:

Platform	Server	Location and job
Windows	Solution Series App Server	..\eCyborg\IW\PayInfoDatabase*environment*\bin
UNIX	Solution Series App Server	[eCyborg_Home]/*environment*/payinfodb/bin
AS/400	Solution Series App Server	*Pay Information database library* (eg. CYBPAYINFO)

2. Execute the Import Pay Information job

In a two-server configuration, the import pay information job is located on the The Solution Series Application Server in the environment-specific Pay Information database directory. To verify the load of the Pay Information database, check the log and error files in the proper subdirectory of the environment-specific Pay Information database directory:

If your database structure has modified table columns, you will need to run the JESCOLUMNS job to generate new format files to match the Pay Information database tables before running JESSPROC.

The import pay information job and location, as well as the resulting log files, is listed here by operating system:

Platform	Server	Location and job	Resulting Files
Windows	Solution Series App Server	..\eCyorg\IW\PayInfoDatabase\CybPay \imppayinfo.bat	LoadPIBasicsData.err LoadPIBasicsData.log LoadPIEarnDeductData.err LoadPIEarnDeductData.log LoadPIEmployeeData.err LoadPIEmployeeData.log LoadPITaxes.err LoadPITaxes.log

UNIX	Solution Series App Server	[eCyborg_Home]/*environment*/payinfo db/imppayinfo	`basics.log`
			`deductions.log`
			`employee.log`
			`taxes.log`

OS/390	Solution Series App Server	*?HLQ?*.PAYINFO.JCL(JPOPYDB)	BASICS DEDUCTIONS EMPLOYEE TAXES
AS/400	Solution Series App Server	CBSVF/JESSPROC	BASICS DEDUCTIONS EMPLOYEE TAXES

Change the SQL password for either the Interactive Workforce or Pay Information database (Windows only)

This task is performed on The Solution Series Application Server.

Changing the SQL Server password

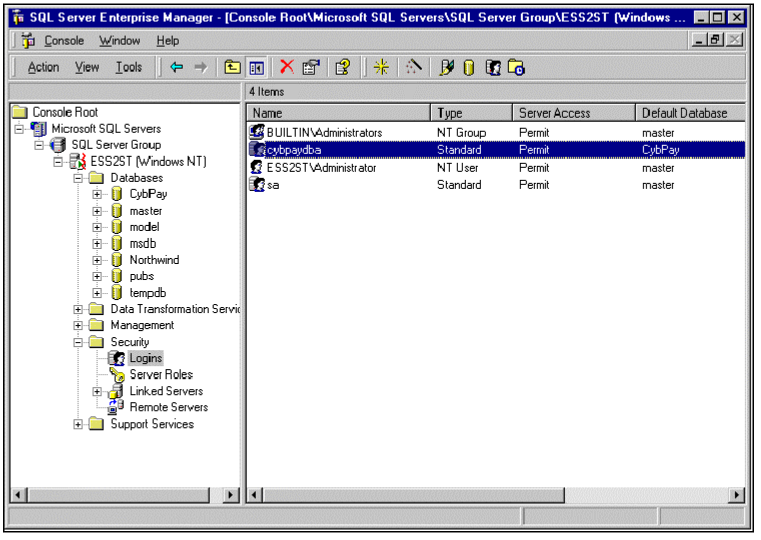
The first part of this task shows you how to change the SQL Server password.

1. Launch the SQL Enterprise Manager

To launch the SQL Enterprise Manager, please make the following selections:

Start ▶ Programs ▶ Microsoft SQL Server 2000 ▶ Enterprise Manager

The SQL Server Enterprise Manager window will appear:

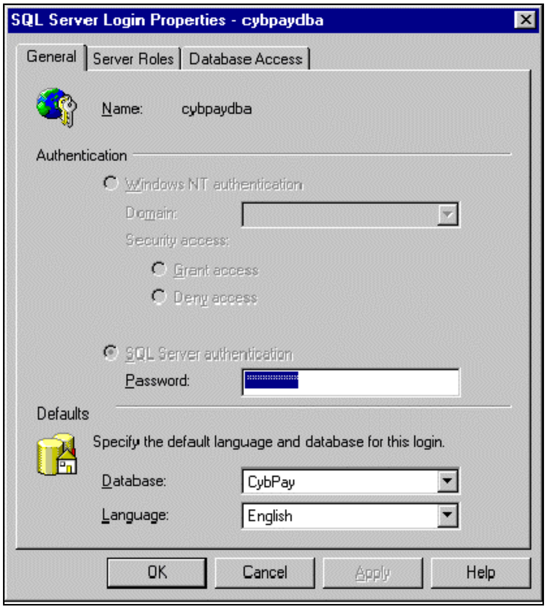


2. In the Navigator on the left, expand the Security directory

Expand the directories until you find the Security directory.

3. **Click Logins**
4. **Select the desired Login name**
5. **Right click, then select Properties**

The SQL Server Login Properties dialog will appear:



6. **In the SQL Server Authentication Password field, type in a new password**
7. **Click Apply**

The Confirm New Password dialog appears:

8. **Type in the new password to confirm**
9. **Click OK**

This will confirm and change the new password. You may close the SQL Server Enterprise Manager at this time.

Reconfiguring the database properties with the new password

The second part of this task details how to edit the database properties file with the new password, so that the system will start each database using the correct password.

1. **Start the Properties Editor**

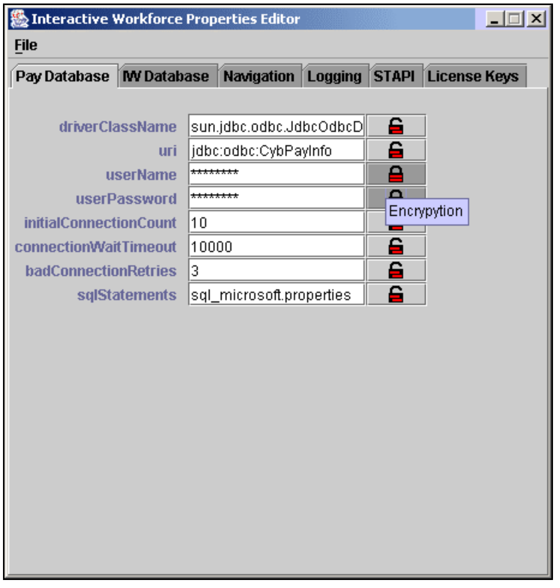
To start the Properties Editor, open a Command Prompt and go to the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*

where *environment* is the name of the ServletExec instance for that environment, then execute the following command string:

PropertiesEditor ess.properties

The configuration utility appears.



2. **Select the Pay Information Database tab**

Click on the Pay Information Database tab in order to display the parameters for that database.

3. **Edit the userPassword parameter**

Change userPassword to the new password.

4. **Save the changes**

To save your changes, make the following selections from the Properties Editor dialog:

File ► Save

Review of Questions Answered

1. What is the Pay Information database? What does it contain? How is it maintained?

2. What other issues should I be aware of regarding the maintenance of the Pay Information database?

CHAPTER 8

Basic Customizations to Interactive Workforce

In This Chapter

Basic Customizations

This chapter covers some of the changes you can make to Interactive Workforce to tailor it to your company's needs.

Tasks

This chapter explains the following:

- Customizations
- The ..\images directory
- Cascading Style Sheets
- Changing web page text using resource files
- Adding hypertext links
- The Navigator
- Modifying extracts to change User Profiles

Prerequisites

Some customizations listed in this chapter, such as changing background colors, adding hypertext links, and modifying extract, require the following skills:

- Java
- HTML
- CSL (Cyborg Scripting Language)

We highly recommend the assistance of a Cyborg consultant for these customizations. Others, such as changing web page text and editing Information pages, can be performed without the help of a skilled consultant.

Questions answered

The following questions are answered in this chapter:

1. What is the difference between Basic customization and Advanced customization?
2. What is the Style Sheet, and how is it used?
3. Where do I go to change text on a web page?

Customizations

Cyborg will assist customers in their implementation of Interactive Workforce with customization services provided by Cyborg Professional Services. These fall into two general categories:

- Basic customizations
- Advanced customizations

Basic customizations

Basic customizations are covered in this chapter. Cyborg can support the following basic customizations:

- Adding graphics using the ..\images directory
- Changing web page appearance using Cascading Style Sheets
- Changing web page text using resource files
- Adding hypertext links
- Changes to the Navigator
- Changes to user profile extracts

Most require only a basic understanding of HTML, such as adding new links to pages, or making a field read-only. Others are performed by editing existing files, such as using the style sheet to change background colors, or editing the resource files to change text on a page. User extract changes are also fairly simple, requiring a knowledge of CSL (Cyborg Scripting Language) to change the Cyborg-supplied extract files.

Advanced customizations

Cyborg strongly recommends that advanced customizations be limited to the fewest number required for the successful implementation of business processes already supported in Interactive Workforce. Customizations to extend the delivered functionality not yet provided will not be supported.

Cyborg Professional Services can support advanced customization to accommodate existing customer-added fields in The Solution Series which are required for the Benefits module, including:

- Adding data fields and labels
- Creating appropriate formatting, validation, and processing logic, to a JSP or JavaBean

☞ *Contact Cyborg Professional Services for more information.*

CSL (Cyborg Scripting Language) customizations

For any customizations that have been made in The Solution Series using CSL, you must shut down and restart Interactive Workforce and the STAPI before those changes will take effect.

☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70).*

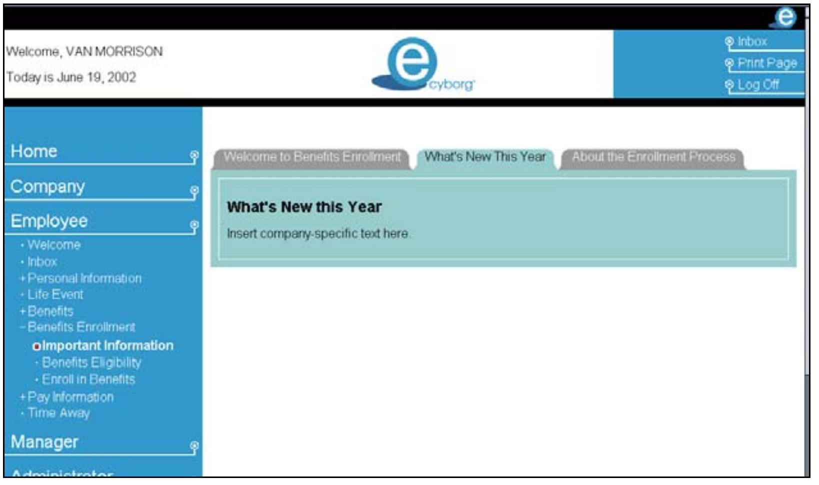
The ..\images directory

If you wish to add graphics to a web page or change an existing one, all graphics files are stored in the following directory:

…\Inetpub\wwwroot\CyborgESS\images\

If you wished to add a new graphic to a page, you would store the .gif or .jpg of the graphic in this directory, then add the file to the desired .jsp or .html file where the graphic should appear.

When adding graphics, there are considerations you should make in order to ensure that it fits in with the look and feel of the web pages. For example, if you wanted to replace the 'ecyborg' logo in the banner with a graphic your company logo:



You would have to take into account the following:

- The width and height for the delivered graphic are: 130x68 pixels. The new graphic should be the same size for a proper fit.
- If you want a graphic to always have a particular background color, you need to make the image background non-transparent.
- If you want a graphic to inherit the background color of the page, you need to make the image background to make it transparent.

Then, you could drop the new graphic of the company logo into the \images directory and give it the names of the delivered graphic:

companyLogo.gif

Note *If the graphics do not display properly in Internet Explorer, it could be a caching issue. If this arises, make the following selections from Internet Explorer:*

Tools ► Internet Options ► Temporary Internet Files

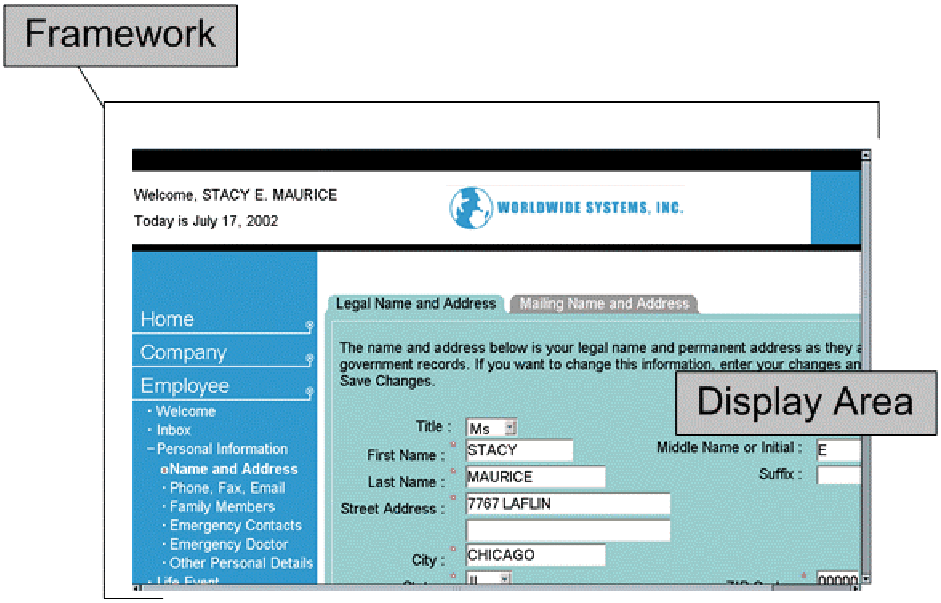
and click Clear History. Then click Settings under 'Temporary Internet Files, and select 'Every time you start Internet Explorer' under 'Check for newer version of pages:'.

Cascading Style Sheets

The style sheet is a text file in which is stored the information that the system uses to generate the overall appearance of the web pages. You can edit the style sheet to change the appearance of pages: background colors, fonts, etc.

Interactive Workforce has two style sheets you may edit:

- **CyborgESS2.css.** Style sheet for display area.
- **SelfService.css.** Style sheet for framework.

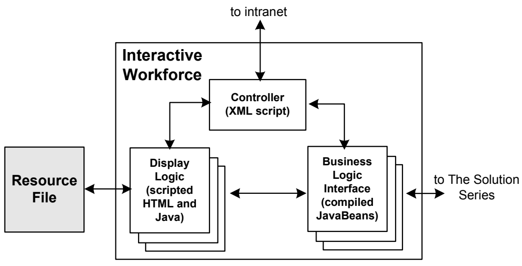


These files are universal, so any changes made to this file will apply to all web pages generated by Interactive Workforce. Any changes made in one file should be made in the other for the pages to remain consistent. They can be edited using any text editor, and can be found on the Web Application Server in the following default filepath:

..\Inetpub\CyborgESS\styles\

Changing web page text using resource files

The wording on the web pages can be tailored to suit your company requirements. This is done using the Resource Files. Resource Files are text files which tell the Java Server Pages what text goes in each field of a web page.



Resource files can be found on the Web Application Server under the following directory:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\Resources

Every text string on the page can be found in a Resource File. They define the text, such as field labels and explanatory text, that the web pages display. They may also contain addressing links or fields used to form such addresses. Client and Server error messages are also defined in resource files.

Changes are made by editing the text to the right of the equal sign of the desired field. For instance, if you wanted the 'Last Name' field to read 'Surname' on the Name and Address web page, you would open the 'NameAndAddressResources.properties' File and edit the LastNameLabel parameter to read 'Surname', as indicated here:

PrimaryAddressTitle=Update Primary Name And Address
MailingAddressTitle=Update Mailing Name And Address
PrimaryInstructions=Enter your legal name and permanent address as they appear on government records. When you are ready to save, click the Save Changes button. If the current information is correct, click the Back button.
TitleLabel=Title
FirstNameLabel=First Name
InitialLabel=Initial
LastNameLabel=Last Name
SuffixLabel=Suffix
StreetAddressLabel=Street Address
CityLabel=City
CountryLabel=Country

(complete text not shown)

Once these changes are made, they will not take affect until after the environment-specific instance of ServletExec has been shut down and restarted.

Internationalization

Resource files can also be used in changing the Interactive Workforce text to another language, or regional spellings. In order to do this, you would need to make a copy of the resources file and rename it to add language, country, or region codes using the following format:

*Filename*Resources_*Language*_*Country*_*Region*.properties

You would replace *Language*, *Country*, and *Region* with the code for a given language or geographical location. The codes are defined by the following standards: ISO 639 (language) and ISO 3166 (country).

You can use only one of these criteria in defining your filename, for example, if you wished to create French text for the Name and Addresses web page, you would copy the 'NameAndAddressResources.properties' and rename it to the following:

NameAndAddressResources_FR.properties

Then, you would edit all the entries to French, as per the following example:

```
TitleLabel=Titre
FirstNameLabel=Prénom
InitialLabel=Initiale
```

Then, when a browser set to display French accesses the servlet engine, it searches for a resource file with the language code in the filename, then uses the text in that file for creating the web page. If there is no filename with that language code, it defaults to the original resource file.

Adding hypertext links

The Display Logic of Interactive Workforce is made up of Java Server Pages (JSPs). JSPs are text files containing Java, JavaScript and HTML statements defining the elements of the web pages. By editing the JSPs, you can further customize Interactive Workforce.

In order to properly integrate a linked file without disturbing the flow of Interactive Workforce, the link must open in a child window. First locate or create the desired page. Then, find the .jsp of the Interactive Workforce page on which you wish the link to appear, and save the .htm or .pdf file in the same directory. Using a text editor, open the desired .jsp and add this exact code within the <head></head> section of the jsp:

```
<script language='JavaScript' src='/CyborgIW/javascript/InfoWindow.js'></script>
```

This JavaScript file has a function called 'infoWindow(*infoFileName*)', where *infoFileName* will mean the URL of the linked page. Then, in the desired location of the .jsp, add the script creating a link to the desired file according to the following format:

```
<a href="javascript:infoWindow('location of page')">Text to be displayed as
link</a>
```

This line would be the same for .htm and .pdf files, but make sure that you are using the correct filename and file extension. See the example below:

```
<head>
<script language='JavaScript'
src='/CyborgIW/javascript/InfoWindow.js'></script>
…
</head>
…
<a href="javascript:infoWindow('/USA-
w4TaxForm.pdf')"><%=i18n.getHtml("W4TaxForm")%></a>

<a href="javascript:infoWindow('/directory/newPage.html')">New Page
Link</a>
```

This line uses the following commands:

- <a> := Hyper link. This is the opening tag, indicating that the information within the paired tags is a hyper link.
- href := Hypertext reference. This command indicates that the following information contained in quotes is the linked file.
- >*hyperlinked text*< := Text. The information between the tags is the text that will be displayed on the web page. This text will appear as a hyper link on the web page. It is a good practice not to hard code the hyper link text into the JSP. Instead, add a resource

string into this JSP's resource file, and use the function i18n.getHtml() with a new look-up key to display the hyper link text at run-time.

- := End of hyper link. This is the closing tag.

Since this change entails adding resource strings, you need to restart ServletExec for the changes to take effect.

Note *During development, it is advisable to set your browser to check for newer versions of the page whenever you visit a page. In MS IE, you set this by: Tools | Internet Options, select Settings, select Every visit to the page. Also, set your browser not to keep any history. In MS IE, select Tools | Internet Options, select Clear History, and enter 0 for Days to keep pages in history.*

The JSPs which comprise the Display Logic can be found on the Web Application Server under the following directory (Default environment):

…\Inetpub\wwwroot\CyborgESS

The Navigator

The Navigator is a series of menus and submenus which lead to the different pages of Interactive Workforce. It works like a directory structure Navigator and is located on the left-hand side of the main page:

You can edit the Navigator in order to:

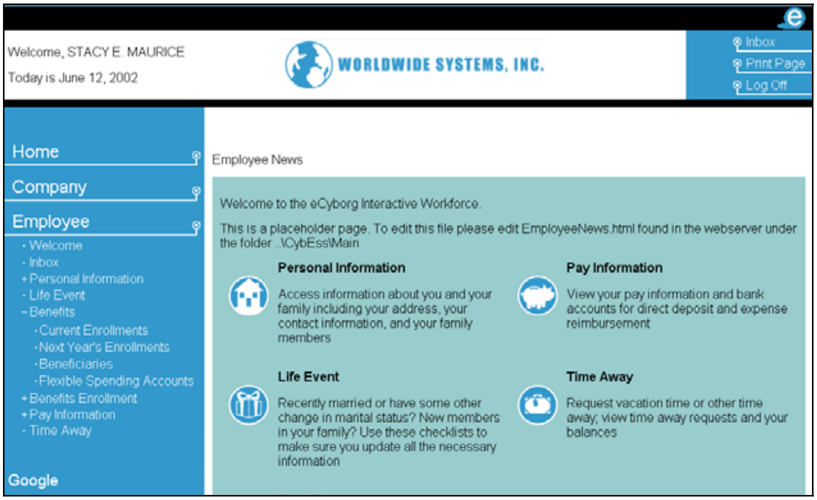
- add links to other websites
- change the text of existing links
- change the order in which they appear in the Navigator
- add new links within the Navigator
- remove links from within the Navigator

These tasks can be performed through editing several files that are part of the Interactive Workforce system. Before editing anything in the Navigator, you should first understand the files used in building it.

Working with menu links

The menu structure of the Navigator is defined by the SiteMap.xml and SiteMapResources.properties files. With an understanding of .xml maps, you can use these files to add, remove, reorder, or change the text of links.

For example, let's take a look at the 'Benefits' and 'Current Enrollments' links in the Navigator:



SiteMapResources.properties

SiteMap.xml retrieves the web page text from the SiteMapResources file, in the following location:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\resources\SiteMapResources.properties

The system uses the Node ID, on the left of the equals sign, to associate the correct text with a node, on the right of the equals sign. One way of locating finding the Node ID for a specific link within is to do a string search for the link text in the SiteMapReources file. Using our example above, if you searched for the string 'Current Enrollments' you would find the following:

```
Benefits=Benefits
CurrentBenefits=Current Enrollments
FutureBenefits=Next Year's Enrollments
```

Here, the string 'Current Enrollments' is associated with the Node ID 'CurrentBenefits'.

SiteMap.xml

The Navigator is defined by the SiteMap.xml file, located in the following default location:

..\Program Files\New Atlanta\ServletExec AS\se-*environment*\SiteMap.xml

Within this file, each link is defined by a pair of <node> tags. The information within the tags is used in creating the link. Each node has a Node ID, which is used to differentiate it from other nodes.

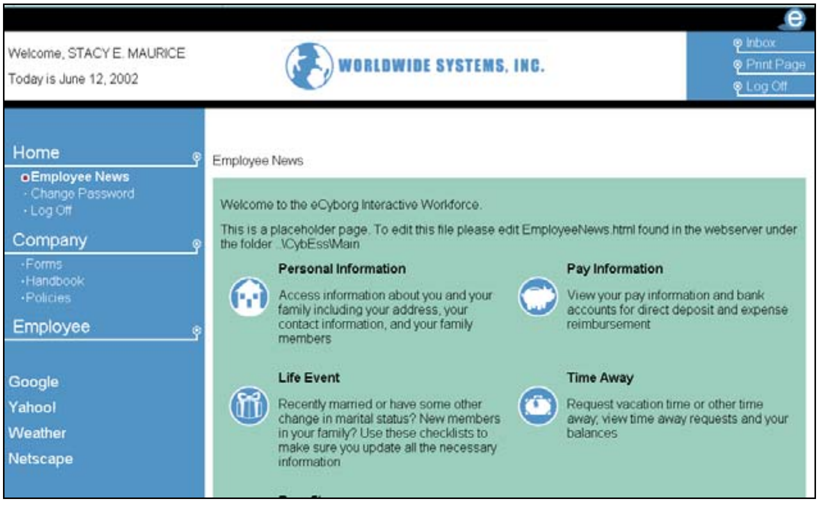
You could take the Node ID 'CurrentBenefits' found in the Site Map resources file, then do a string search for it in the SiteMap.xml file to find the corresponding link node, as shown here:

```
<node id='Benefits'><decorator class='com.cyborg.selfservice. ... '/>
   <node id='CurrentBenefits'>
          <page extends='includedMap'>
               <region ref='processContent' >
                         <param name='map' value='ViewCurrentEnrollments' />
               </regi on>
          </page>
   </node>
   <node id='FutureBenefits'>
          ...
   </node>
...
</node>
```

Here, the 'Benefits' Node ID defines the 'Benefits' link in the menu, while the 'CurrentBenefits' node defines the 'Current Enrollments' link. Missing code is represented by an ellipse (...). Here, you can see how the <node> tags open and close the node definition. It also demonstrates how you can embed <node> tags within another set of tags to create a submenu.

Changing the text of existing Navigator links

If you wish to change the text of an existing link in the Navigator, you would first need to identify which link in the Navigator. For example, say you wanted to change the 'Forms' link:



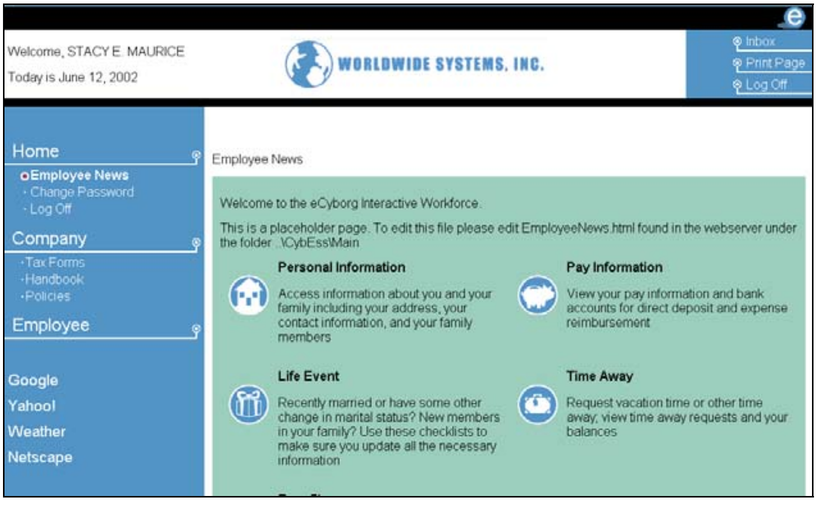
Using a text editor, open the SiteMapResources.properties file. Scroll through the properties file to locate the name-value pair for the link. For example, the 'Form' link appears in the file as follows:

```
Company=Company
Forms=Forms
Handbook=Handbook
Policies=Policies
JobOpenings=Job Openings
```

Once you've identified the link text within the properties file, edit to read as desired. If you wanted to change the 'Forms' link to read 'Tax Forms', you would change the value as follows:

```
Company=Company
Forms=Tax Forms
Handbook=Handbook
Policies=Policies
JobOpenings=Job Openings
```

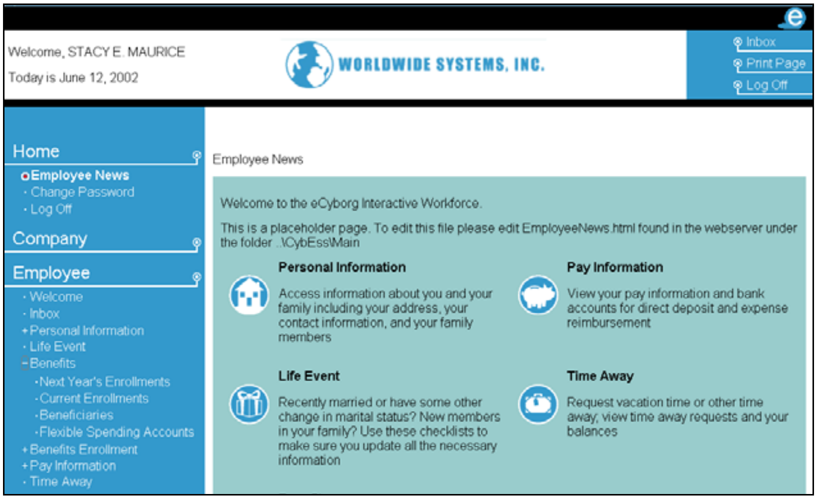
Before this change will take effect, you will need to restart ServletExec in order to reload the changed information. The next time you access the page, the link will appear with the new text:



☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for information on restarting ServletExec.*

Adding links to the Navigator

If you wish to add a new link to the Navigator menus, you would first need to identify where in the menu you would like the new link to appear. For example, say you want to add a link to a new .html page called 'NewPage', and attach it using a link called 'New Link'. You might want to place the new link after the 'Next Year's Enrollment' link under the '-Benefits' menu:



First, you need to add the desired text to the Site Map resources file. Scroll through the properties file to locate the name-value pair for the link you used as a reference point when placing the new link. You may so a search for the text string for the link you wish to place the new one after. For example, you can find the corresponding pair by doing a search for the character string 'Next Year's Enrollments':

```
Benefits=Benefits
CurrentBenefits=Current Enrollments
FutureBenefits=Next Year's Enrollments
BeneficiariesInfo=Beneficiaries
FlexSpendingAccount=Flexible Spending Accounts
```

You can use the character strings on the left side of the name-value pairs in searching for the link node when editing the SiteMap.xml file. In the example here, you would use the string 'FutureBenefits' once you get to SiteMap.xml. Once you've identified the link text within the properties file, edit to read as desired. If you wanted to change the 'Forms' link to read 'Tax Forms', you would change the value as follows:

```
Benefits=Benefits
CurrentBenefits=Current Enrollments
FutureBenefits=Next Year's Enrollments
NewPage=New Link
BeneficiariesInfo=Beneficiaries
FlexSpendingAccount=Flexible Spending Accounts
```

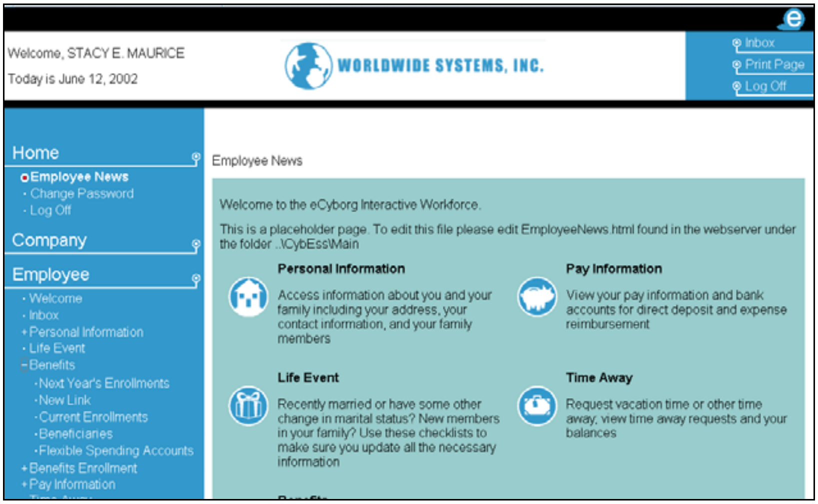
Then, add a new link node to the SiteMap.xml file. First, figure out which link on the page you wish the new link to appear after. For example, say we want to add a new node between the 'Next Year's Enrollment' (node id = 'FutureBenefits') and 'Current Enrollment' (node id = 'CurrentBenefits' links. You could locate these nodes by doing a search on the string 'FutureBenefits', taken from the SiteMapResources.properties file. Once you've identified where in the code the node link should appear, add the new link node code. For example:

```
<node id='Benefits'><decorator class='com.cyborg.selfservice. ... '/>
    <node id='FutureBenefits'>
        <decorator class='com.cyborg.selfservice.benefits. ...' />
            <decorator class='com.cyborg.selfservice.benefits. ... '/>
                <page extends='includedMap'>
                    <region ref='processContent' >
                        <param name='map' value='ViewFutureEnrollments' />
                    </region>
                </page>
        </node>

    <node id='NewPage'>
        <page extends='processPage'>
            <region ref='processContent'
resource='/CyborgIW/LAF/NewPage.html' />
        </page>
    </node>

   <node id='CurrentBenefits'>
        <page extends='includedMap'>
            <region ref='processContent' >
                    <param name='map' value='ViewCurrentEnrollments' />
            </region>
        </page>
    </node>
...
</node>
```

Before this change will take effect, you will need to restart ServletExec in order to reload the changed information. The next time you access the page, the new link will appear:



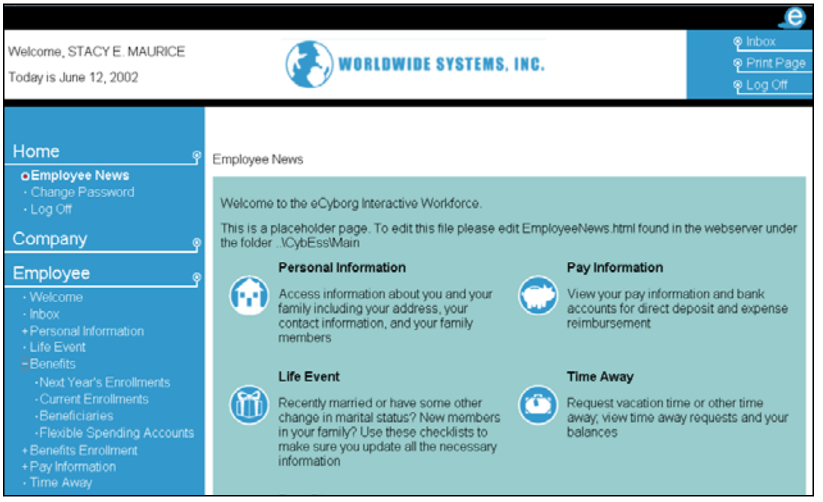
☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for information on restarting ServletExec.*

Removing links from the Navigator

If your company is not using a particular piece of functionality, you should first check to see if it can be shut off using the Manage Features page in Interactive Workforce in order to remove it from the Navigator.

☞ *Refer to eCyborg Interactive Workforce: The Administrator's Guide for more information on Managing Features.*

However, some pieces may need to be removed from the Navigator manually. If you wish to remove a link from the Navigator menus, you would first need to identify the link. For example, your company might not need the Flexible Spending Accounts Functionality. First, you would have to determine the location of the 'Flexible Spending Accounts' link within the Navigator:



Using a text editor, open the SiteMap.xml file, scroll through the file until you locate the link node that defines the link you wish to remove. Or, you may use the character string from the name-value pair in the SiteMapResources.properties file. In our example, you could do a search for the string 'FlexSpendingAccount' to find the link node.

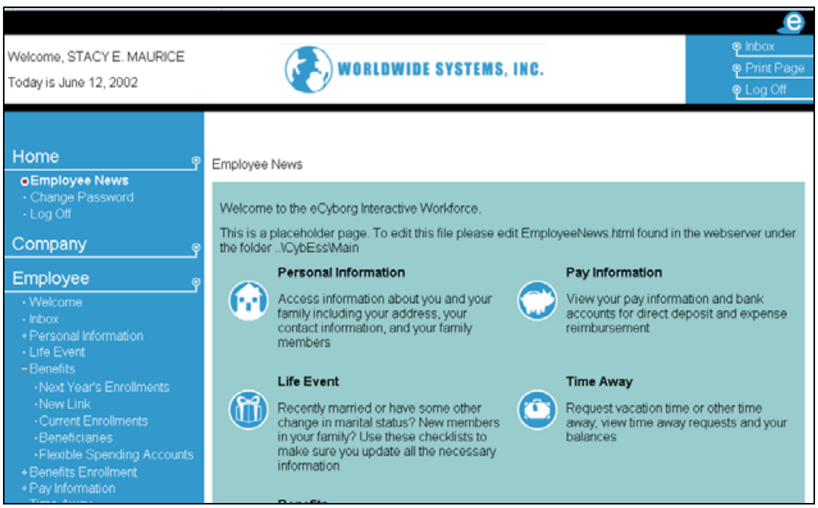
Once you've identified the code for the link node you wish to remove, you can delete the lines, or remark them out in case your company decides to use the functionality at a later date. For example:

```
<node id='Benefits'><decorator class='com.cyborg.selfservice. ... '/>
  ...
    <node id='BeneficiariesInfo'>
        <page extends='includedMap'>
            <region ref='processContent' >
                <param name='map' value='Beneficiaries' />
            </region>
        </page>
    </node>

<!--
    <node id='FlexSpendingAccount'>
        <page extends='includedMap'>
            <region ref='processContent' >
                <param name='map' value='ViewFsaBalances' />
            </region>
        </page>
    </node>
-->

</node>
```

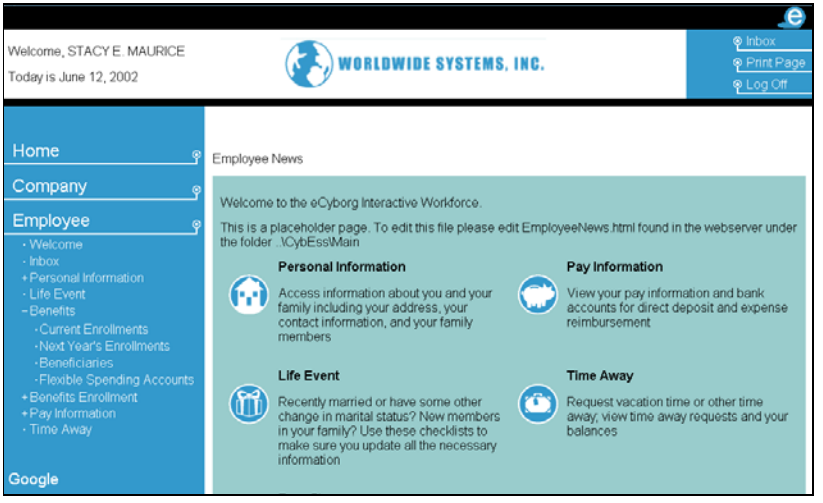
Before this change will take effect, you will need to restart ServletExec in order to reload the changed information. The next time you access the page, the link will no longer display:



☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for information on restarting ServletExec.*

Changing the order of links in the Navigator

If you wish to change the order of links in the Navigator, you would first need to identify which link in the Navigator you wish to reorder. For example, say you wanted to move the 'Current Enrollment' link to appear after the 'Next Year's Enrollments' link, both of which fall under the '-Benefits' menu:



Identify the map nodes for the links within the file. Each link is defined within a pair of <node> tags, and you can identify each node by it's node id. Scroll through the properties file to locate the map for the link you wish to move, as well as the one you wish to move it before or after. For example, the node for the 'Benefits' link appears in the file before the 'Benefits Enrollment link, as follows:

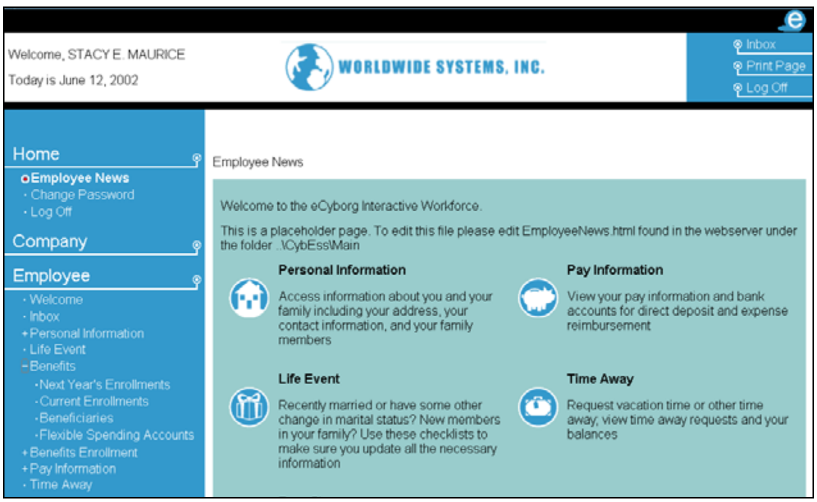
```
<node id='Benefits'><decorator class='com.cyborg.selfservice. ... '/>
    <node id='CurrentBenefits'>
        <page extends='includedMap'>
            <region ref='processContent' >
                    <param name='map' value='ViewCurrentEnrollments' />
            </region>
        </page>
    </node>
    <node id='FutureBenefits'>
        <decorator class='com.cyborg.selfservice.benefits. ...' />
            <decorator class='com.cyborg.selfservice.benefits. ... '/>
                <page extends='includedMap'>
                    <region ref='processContent' >
                        <param name='map' value='ViewFutureEnrollments' />
                    </region>
                </page>
        </node>
...
</node>
```

Cut the code for the entire link node, then paste it in the new location where you would like it to appear. Be sure that you have the entire node from the open tag (<node id...>) to the close tag (</node>). If you are moving a main menu head containing submenu links, make sure that all of those are included, as well.

In our example, we want to move the 'Next Year's Enrollment' link node (node id = 'Future Benefits') to appear before the 'Current Enrollment' link node (node id = 'Current Benefits'). The code below shows where those two link nodes have been moved:

```
<node id='Benefits'><decorator class='com.cyborg.selfservice. ... '/>
    <node id='FutureBenefits'>
        <decorator class='com.cyborg.selfservice.benefits. ...' />
            <decorator class='com.cyborg.selfservice.benefits. ... '/>
                <page extends='includedMap'>
                    <region ref='processContent' >
                        <param name='map' value='ViewFutureEnrollments' />
                    </region>
                </page>
        </node>
    <node id='CurrentBenefits'>
        <page extends='includedMap'>
            <region ref='processContent' >
                    <param name='map' value='ViewCurrentEnrollments' />
            </region>
        </page>
    </node>
...
</node>
```

Before this change will take effect, you will need to restart ServletExec in order to reload the changed information. The next time you access the page, the link will appear with the new the links in the new order:



☞ *Refer to* **Shutting down Interactive Workforce** *(on page 59) and* **Starting Interactive Workforce** *(on page 70) for information on restarting ServletExec.*

Modifying extracts to change User Profiles

User Profiles contain data which define the users who can access Interactive Workforce. This data includes information such as: Login ID, organization, current employment status, initial password, and current password (encrypted for security reasons).

The ESSXPT is the first script used in populating the Interactive Workforce database. It extracts the information from The Solution Series that it needs to generate the User Profiles.

By making some modifications to ESSXPT, you can change the way the Initial Load and Update User scripts create and update the following information in the User Profile:

- Login ID
- Initial Password creation

Editing the ESSXPT script

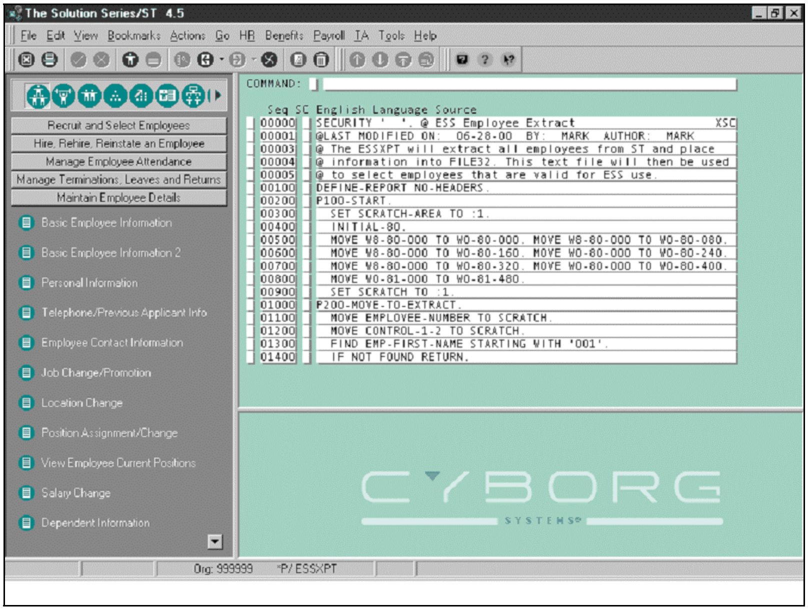
The JEssxpt.bat script is in Cyborg Scripting Language (CSL). In order to access and modify the ESSXPT script, you must first log on to *The Solution Series* as the Security Officer. Then, from the main menu of the workspace, make the following selections:

Tools ► Development Tools ► Programming Utilities ►
Edit Control Repository Objects

When the Edit Utility form appears, make the following field selections:

Object: EL Source
Object Key: ESSXPT

When you press Enter, Edit Utility will open the ESSXPT script, as shown here:



Login name

By default, Interactive Workforce uses the The Solution Series Employee ID for the Login name. The Employee ID is a number assigned to an employee, and may be difficult to remember. Also, as with the initial passwords, it requires the Interactive Workforce Admin distribute these to the employees, which can be a large task.

You can modify the ESSXPT script so that Interactive Workforce can be set up to use other The Solution Series data for the Login name. For example, the system can be modified to use the employees' last names as Login names. This way, users will already know their Login ID, and you will not have to distribute a large number of numeric IDs. Using the employees' last names as the Login ID would also make it easier for users to remember.

For example, to modify the ESSXPT script to extract the employee's last name as the Login ID instead of the The Solution Series Employee Number, you would make the following changes:

1. Change the EMPLOYEE-NUMBER to the desired The Solution Series field you wish to use as the Login ID. In our example, EMP-LAST-NAME.
2. Move the desired number of maximum characters to SCRATCH. This is the number of characters from the field that will be used for the Login ID. For example, if you only want to use the first 10 characters of the last name, move 10 to SCRATCH.

```
P ESSXPT 05300 @                                                A
P ESSXPT 05400 @ If you want to allow employees to login using  A
```

```
P ESSXPT 05500 @ something besides EMPLOYEE-NUMBER, you must specify what      A
P ESSXPT 05600 @ field you want to use in its place in the code below.         A
P ESSXPT 05700 @ The maximum length of "Login_Name" is 30 bytes. Move the      A
P ESSXPT 05800 @ information to SCRATCH. If your field is only 10 bytes        A
P ESSXPT 05900 @ for example, MOVE the 10 bytes to SCRATCH, then move          A
P ESSXPT 06000 @ W7-20-176 (SPACES) TO SCRATCH so that it totals 30.           A
P ESSXPT 06100 @                                                               A
P ESSXPT 06200   MOVE EMP-LAST-NAME TO SCRATCH.                                A
P ESSXPT 06300   MOVE W7-10-176 TO SCRATCH.  @ Spaces to remainder of           A
P ESSXPT 06400                               @ Login_Name                       A
P ESSXPT 06410   MOVE '*' TO SCRATCH.
P ESSXPT 06500 @                                                                A
                                                                   (complete
text not shown)
```

Once these changes have been made, the ESSXPT script will move the last name into the Login Name space of the EssUser.txt file. Then, when the LoadUser.bat script is run to populate the Interactive Workforce database, the last name will become the Login ID for each user.

Initial password creation

By default, Interactive Workforce creates an initial password for each user. Although a secure method, it requires that the Interactive Workforce Admin put some thought into how they should be distributed. Rather than distributing newly created initial password to all new users, you can set up the system to use other data that they already know as the initial password.

When the ESSXPT loads a user for the first time, it creates space for the initial password. By default, that space remains empty. If the LoadUser.bat script sees that the space is empty, then it creates a randomly generated password. However, by modifying the ESSXPT script to put something in that space, then the data in that space becomes the initial password.

For example, to modify the ESSXPT script to use Social Security Numbers as the initial passwords, you would need to find the following lines in the script:

```
P ESSXPT 04400 @                                                               A
P ESSXPT 04500 @ Insert logic below if you want to generate a different        A
P ESSXPT 04600 @ initial password then the randomly generated password         A
P ESSXPT 04700 @ that is delivered with the system.  Just move 40 bytes of     A
P ESSXPT 04800 @ information to SCRATCH. If your field is only 10 bytes        A
P ESSXPT 04900 @ for example, MOVE the 10 bytes to SCRATCH, then move          A
P ESSXPT 05000 @ W7-30-176 (SPACES) TO SCRATCH so that it totals 40.           A
P ESSXPT 05100 @                                                               A
P ESSXPT 05200     MOVE W7-40-176 TO SCRATCH.  @ Initial_Password              A
P ESSXPT 05300 @                                                               A

(complete text not shown)
```

Then, you would add new logic moving the Social Security fields to SCRATCH. Depending on the size of the data in the field you chose, you may then want to move more or less data to SCRATCH. For example, the Social Security Number contains nine characters, so you would want to move 31 bytes to SCRATCH. The following example shows how the script would be modified:

```
P ESSXPT 04400 @                                                              A
P ESSXPT 04500 @ Insert logic below if you want to generate a different       A
P ESSXPT 04600 @ initial password then the randomly generated password        A
P ESSXPT 04700 @ that is delivered with the system.  Just move 40 bytes of    A
P ESSXPT 04800 @ information to SCRATCH. If your field is only 10 bytes       A
P ESSXPT 04900 @ for example, MOVE the 10 bytes to SCRATCH, then move         A
P ESSXPT 05000 @ W7-30-176 (SPACES) TO SCRATCH so that it totals 40.          A
P ESSXPT 05100 @                                                              A
P ESSXPT 05105     MOVE SSN-1-3 TO SCRATCH.                                   A
P ESSXPT 05110     MOVE SSN-5-6 TO SCRATCH.                                   A
P ESSXPT 05115     MOVE SSN-8-11 TO SCRATCH.                                  A
P ESSXPT 05200     MOVE W7-31-176 TO SCRATCH.  @ Initial_Password             A
P ESSXPT 05300 @                                                              A
(complete text not shown)
```

With these modifications, the ESSXPT script will create the EssUser.txt file with the users' Social Security Numbers listed where the data for Initial Password belongs. So, when the UpdateUser.bat script is run, it will load the Social Security Numbers into the Interactive Workforce database as the initial passwords.

PART 3

Appendices

In This Section

APPENDIX A

Database Tables

In This Appendix

The Interactive Workforce database

This section details each data table of the Interactive Workforce database:

Benefit_Plan

Definition: This table is used to maintain data specific to a benefit plan that is needed by Interactive Workforce to display information to the employee user correctly. It is also used to maintain the relationship between the Benefit Plan and the Sub-Group to which the plan belongs.

Source: This table is created when the create db script is executed. Records are created and populated by a Benefits Administrator via the Benefits Administrator GUI pages "Verify Organizations and Flex Plan Masters, "Maintain Plan Information - Step 2 of 3" page and "Maintain Plan Information - Step 3 of 3". Note: This is quite complex, for additional detail see section of the Functional Design specific to the pages referenced.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Benefit_Plan_ID	VARCHAR	3	no	yes			This is the ID code of the benefit plan.	Records are created and populated when a benefits administrator selects "finish" on "Verify Organizations and Flex Plan Masters" page. Records are added and/or deleted when a benefits administrator selects "refresh" on the Maintain Plan Information -Step 2 of 3" page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Flex_Master_Plan_ID (FK)	CHAR	3	no	yes			This is the Flex Master Plan ID. This is MASTER-PLAN-ID from the TP-ESS form in The Solution Series .	Records are created and populated when a benefits administrator selects "finish" on "Verify Organizations and Flex Plan Masters" page. Records are added and/or deleted when a benefits administrator selects "refresh" on the Maintain Plan Information - Step 2 of 3" page.
Flex_Master_Plan_Effective_Date (FK)	DATETIME		no	yes			This is the effective date of the Flex Master Plan. This the MASTER-PLAN_DATE from the TP-ESS	Same as Flex_Master_Plan_ID above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_Number (FK)	CHAR	4	no	yes			The control number is used in The Solution Series to group sets of plans together. This TP-CONTROL-NUMBER from the TP-ESS form in The Solution Series . It is the same as MASTER-PLAN from the AY-SCR form in The Solution Series .	Same as Benefit_Plan_ID above.
Benefit_Plan_Sub_Group_Id (FK)	CHAR		yes	no			This is used to indicate the subgroup to which the benefit plans belongs so it can be displayed properly to the employee user.	A foreign key originating from the Benefit_Plan_Sub_Group table
Benefit_Plan_Display_Name	VARCHAR	60	yes	no		Trim trailing spaces from end	This is the name of the benefit plan that will be displayed to the employee user.	Same as Benefits_Plan_ID above. Additionally, can be populated from the "Maintain Plan Information - Step 3 of 3" page if a benefits administrator enters a name other than the name in The Solution Series .

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Display_Comp _Contrib	CHAR	1	yes	no			This an an indicator that allows the customer the ability to choose whether the company contribution of a benefit plan is or is not to be displayed to the employee user.	Populated from entries made by a Benefits Administrator on the "Maintain Plan Information - Step 3 of 3" page.
Variable_Requi red	CHAR	1	yes	no			This is an indicator that is used to display the "requires a variable entry" portion of the "Maintain Plan Information-Step 3 of 3" page to a benefits administrator only for plans that require a variable entry.	Same as Benefits_Plan_ID above.
Plan_Done	CHAR	1	yes	no			This is an indicator that is used to display the done check on "Maintain Plan Information - Step 2 of 3" page when the administrator has complete the Interactive Workforce set up for a particular benefit plan.	Populated when a benefits administrator selects "save changes" on the "Maintain Plan Information _Step 3 of 3" page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Beneficiary_Required	CHAR	1	yes	no			This is an indicator that used to determine whether or not beneficiaries are associated with this plan. If they are, the appropriate beneficiary functionality will be presented to the employee user specific to the benefit plan.	Same as Display_Comp_Contrib above.
FSA_Maximum_Contribution	FLOAT		yes	no			This is the maximum contribution or coverage amount allowed for a variable entry plan.	Same as Display_Comp_Contrib above.
FSA_Claim_Deadline_Date	DATETIME			yes	no		This is the deadline for submitting flexible spending account claims.	Same as Display_Comp_Contrib above.

Benefit_Plan_Group

Definition: This table is used for data that is needed by Interactive Workforce to display plans grouped and in a sequence that makes sense to the employee user.

Source: This table is created when the create db script is executed. Records and values are created, modified and deleted by a Benefits Administrator via the Benefits Administrator GUI pages "Manage Plan Groups - Step 2 of 2" and "Maintain Display Order". This data has no relationship to The Solution Series .

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Benefit_Plan_Group_ID	CHAR	3	no	yes			The benefit group ID.	A number that is generated by the system when a new group name is added via "Manage Plan Groups - Step 2 of 2" page.
Benefit_Plan_Group_Order_Number	INTEGER		yes	no			The number used to designate the order in which benefit groups are to be displayed to the employee user.	A number entered by a benefits administrator to indicate the display order via "Maintain Display Order" page
Benefit_Plan_Group_Name	VARCHAR	40	yes	no			The name of the benefit group that is displayed to an Interactive Workforce employee user.	An entry made by a benefits administrator on the "Manage Plan Groups -Step 2 of 2" page.

Benefit_Plan_Option

Definition: This table is used for data needed by Interactive Workforce so that dependent pages are only displayed to the employee when an option appropriate to dependents is selected as the employee enrolls in benefits.

Source: This table is created when the create db script is executed. Records are created using the BA03 Option list from the Option_List table and default values populated the first time a Benefits Administrator accesses the "Maintain Dependent Coverage Options" page The Benefits Administrator indicates whether or not dependents are required for a particular option via the Benefits Administrator GUI page "Maintain Dependent Coverage Options" in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Benefit_Plan_Option_Code	VARCHAR	14	no	yes			The is the code from the The Solution Series option list BA03.	See table source above.
Dependent_Required	CHAR	1	yes	no			This is an indicator used by a Benefits Administrator that determines if an option allows dependents. If so, when the employee user selects an option for a plan that can have dependents, the Interactive Workforce dependent functionality is displayed.	See table source above.

Benefit_Plan_Sub_Group

Definition: This table is used for data that is needed by Interactive Workforce to display plans grouped by subgroups that relate to a group and in a sequence that makes sense to the employee user.

Source: This table is created when the create db script is executed. Records and values are created, modified and deleted by a Benefits Administrator via the Administrator GUI pages "Assign Plan Subgroups to Groups", "Manage Plan Subgroups", and "Maintain Display Order" in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Benefit_Plan_Sub_Group_ID	CHAR	3	no	yes			The benefit subgroup ID.	A number that is generated by the system when a new group name is added via "Manage Plan Subgroups page.
Benefit_Plan_Group_ID (FK)	CHAR	3	yes	no			The benefit group ID.	A foreign key originating from the Benefit_Plan_Group table. This field is populated when a benefits administrator selects the group to which the subgroup belongs on "Assign Plan Subgroups to Groups" page.
Benefit_Plan_Sub_Group_Name	VARCHAR	40	yes	no			The name of the benefit subgroup that is displayed to an Interactive Workforce employee user.	An entry made by a benefits administrator on the "Manage Plan subgroups" page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Benefit_Plan_Sub_Group_Order_Number	INTEGER		yes	no			The number used to designate the order in which benefit subgroups within benefit groups are to be displayed to the employee user.	A number entered by a benefits administrator to indicate the display order via "Maintain Display Order" page

Cyborg_Group

Definition: This table stores all the valid groups that a client may assign to each user.

Source: This table is created when the create db script is executed. A record is created and populated with default values when the set initial values script is executed. Note: There is only one cyborg_group record for which is "Default Group." The intention is to expand this functionality in future Interactive Workforce releases.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Group_Name	VARCHAR	30	no	yes			The name of a group of Interactive Workforce users defined by the customer. Note: There is only one group in Interactive Workforce consequently for this release the customer does not have the ability to define groups.	See table source above
Group_Description	VARCHAR	50	yes	no			The description of a group of Interactive Workforce users defined by the customer.	See table source above
Active	CHAR	1	yes	no			An indicator used to differentiate between active and inactive groups.	See table source above
Membership	VARCHAR	80	yes					

Cyborg_Home_Page_Message

Definition: A customer defined message that will display on the Interactive Workforce Home Page.

Source: This table is created at the time the create db script is executed. A record is created and the value populated by an Interactive Workforce Administrator via the Interactive Workforce Administrator "Home Page Special Message" GUI page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Cyborg_Home_Page_Message	VARCHAR	160	yes	no			A customer defined informational message that is displayed on the Interactive Workforce home page.	See table source above

Cyborg_User

Definition: A table with records all users who can access a self-service application.

Source: The table is created when the create database script is executed. A record is created for InitialAdm when the set initial values script is executed. Records for employee users are created when the load users script is executed. Administrative users are created via the GUI interface provided in the Interactive Workforce Administrator page "Add an Administrator". Values for some of these fields are populated through various programs or by the user via the application GUI. Check specific fields below for addition information.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Employee_ID	VARCHAR	10	no	yes			This is the number of the employee in the customer's The Solution Series system or the number assigned to an administrative user within the Interactive Workforce application.	Created: InitialAdm from set initial values script with value of InitialAdm Employee users from Intermediate_Cyborg_User table/Employee_Id field when load users script is executed. Administrative users via Interactive Workforce Administrator GUI "Add an Administrator" in FD Deleted: InitialAdm can never be deleted. Employee users via Interactive Workforce Administrator GUI "Change a users account settings-Step 3 of 3 in FD or if they no longer meet the selection criteria when the load users script is executed. Administrative users via Interactive Workforce Administrator GUI "Change a users account settings-Step 3 of 3 in FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Organization_ID	VARCHAR	6	no	yes			The organization to which the user belongs. The organizations for employee users come from the Intermediate_ Cyborg_User table. All administrators are assigned the organization of EssAdm.	Same as Employee_Id above. InitialAdm and all administrator users have a value of EssAdm.
Login_Name	VARCHAR	30	no	no			The name the user enters on the log on page in the "User ID" entry box.	If Login-Name in the Intermediate_Cyborg_User table is blank/null, this field has the same value as Employee_Id in the Intermediate_Cyborg_User table. If there is a value in Login_Name in the Intermediate_Cyborg_User table it is used to populate this field. This is populated via the load users script for employee users. For InitialAdm it is populated with InitialAdm when the set initial vales script is executed. For administrator users it is populated when "Add an Administrator" page is executed.
Employee_First_Name	VARCHAR	15	no	no			The first name of an Interactive Workforce user.	Same as Employee_First_Name in the Intermediate_Cyborg_Table populated when the load users script is executed for employee users. For InitialAdm it is populated with InitialAdm when the set initial values script is executed. For administrator users it is populated when "Add an Administrator" page is executed.

Name	**Type**	**Size**	**Nulls**	**Primary Key**	**Default Value**	**Comments**	**Definition**	**Source**
Employee_Middle_Name	VARCHAR	15	yes	no			The middle name of an Interactive Workforce user.	Same as Employee_Middle_Name in the Intermediate_Cyborg_Table populated when the load users script is executed for employee users. InitialAdm and administrator user values are blank.
Employee_Middle_Initial	CHAR	1	yes	no			The middle initial of an Interactive Workforce user.	Derived from Employee_Middle_Name when the load users script is executed for employee users. InitialAdm and administrator user values are blank.
Employee_Last_Name	VARCHAR	20	no	no			The last name of an Interactive Workforce user.	Same as Employee_Last_Name in the Intermediate_Cyborg_Table populated when the load users script is executed for employee users. For InitialAdm it is populated with InitialAdm when the set initial values script is executed. For administrator users it is populated when "Add an Administrator" page is executed.
Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Initial_Password	VARCHAR	40	yes	no			The password with which a Interactive Workforce user initially logs onto a Interactive Workforce application. The user's password is also reset to the initial password if the user forgets her password or allows her account to expire.	If Initial_Password in the Intermediate_Cyborg_User table is blank/null, a Java program is executed in conjunction with the load user script to generate a unique initial password. If there is a value in Initial_Password in the Intermediate_Cyborg_User table it is used to populate this field. This is populated via the load users script for employee users. For InitialAdm it is populated with InitialAdm when the set initial values script is executed. For administrator users it is populated when "Add an Administrator" page is executed.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Password_Expiration_Date	SMALLDATETIME		yes	no			A date calculated within the Interactive Workforce application that is used to determine when a user's password is to expire.	For employee users the same Java program that creates an Initial_Password calculates the Password_Expiration_Date based on current date and values for Password_Lifetime and Account_Lifetime in the ESS_Universal table when the load users script is executed. For InitialAdm this date is specified in the set initial values script and must be a date greater than today's date. For administrator users this date is initially calculated when the user is created via the "Add an Administrator" Interactive Workforce Administrator GUI page in the FD. This date is reset whenever a user changes her password.
Current_Password	VARCHAR	40	yes	no	NULL		A user defined password that a Interactive Workforce user enters to access an Interactive Workforce application.	Defined by the user via the GUI pages "Change Password". This is encrypted.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Account_Creation_Date	SMALLDATETIME		no	no			The date on which an Interactive Workforce user's account was created.	Populated for InitialAdm when the set initial values script is executed. Populated for employee users when the load users script is executed. Populated for administrative users when the an Interactive Workforce Administrator adds an administrator via the "Add an Administrator" page in the the FD.
Day_One_Flag	CHAR	1	no	no	I	I=Incomplete; InitialAdm and Administrator users must be marked C=complete	An indicator Interactive Workforce needs to determine the appropriate home page to display to the employee user--Day One Home Page or Interactive Workforce Home Page.	Populated for InitialAdm with "c" when the create database script is executed. Populated for employee users when the load users script is executed. It is changed to a "c" when all Day_One_Tracking flags are marked "c." Populated for administrative users with "c" when the an Interactive Workforce Administrator adds an administrator via the "Add an Administrator" page the the FD.
Pay_Frequency	CHAR	1	yes	no			An indicator that designates the employee's pay frequency	For employee users same as Pay_Frequency in the Intermediate_Cyborg_Table populated when the load users script is executed. No value is entered in this field for InitialAdm or administrator users.

Name	**Type**	**Size**	**Nulls**	**Primary Key**	**Default Value**	**Comments**	**Definition**	**Source**
Employment_Date	SMALLDATETIME		yes	no			This is the employee's date of employment.	For employee users same as Employment_Date in the Intermediate_ Cyborg_Table populated when the load users script is executed. No value is entered in this field for InitialAdm or administrator users.
User_Type	INTEGER		no	no	0 (Zero)	Employee = 0	All non-employee users greater than 0	An indicator used to designate different types of Interactive Workforce users, for example employee user versus administrator users. For employee users, this field is populated with "0" when the load users script is executed. For InitialAdm this field is populated with a value greater than "0" when the set initial values script is executed. For administrator users this field is populated with a value greater than "0" when an Interactive Workforce Administrator adds an administrator via the "Add an Administrator" GUI page in the FD.
Benefits_Enrollment_Date	SMALLDATETIME		yes	no			The date on which an employee user successfully completes a benefits enrollment via the Interactive Workforce system.	This field is populated with current date when an employee user selects "Finished enrollment" on the Benefits Enrollment Summary page.

Cyborg_Organization

Definition: A table that contains records for all Organizations (Control 1-2s) in the customer's The Solution Series system.

Source: This table is created when the create db script is executed. A record is created for the Interactive Workforce Administrator organization when the set initial values script is executed. Records are created and populated for every Organization in The Solution Series when an Interactive Workforce Administrator selects the "Select Organization for Interactive Workforce Load" page in the Admin GUI. This data is retrieved via a STAPI call from the ORGESS form in The Solution Series .

Name	**Type**	**Size**	**Nulls**	**Primary Key**	**Default Value**	**Comments**	**Definition**	**Source**
Organization_ID	VARCHAR	6	no	yes			The unique identifier of an organization (Control1-2) that has been set up in The Solution Series or in the case of the ESSAdm organization set up within the Interactive Workforce application.	See table source above
Organization_Name	VARCHAR	50	no	no			The name of an organization (Control 1-2) that has been set up in The Solution Series or in the case of ESSAdm organization set up within the Interactive Workforce application.	See table source above
Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Country_Code	VARCHAR	1	no	no	0	0=US		
1=Canada								

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Default to US	The country that is applicable the organizations (Control 1-2) that has been designated in The Solution Series .	See table source above						
Check_Allowed	CHAR	1	yes	no	Default is no check allowed with a value of "n"	An indicator used within the Interactive Workforce system that designates whether a particular organization allows employee pay to be given via a paper paycheck.	This field is initial populated with the default value of "n" when this record is created. The value can be changed a payroll administrator via the Payroll Administrator GUI page "Set Up Direct Deposit HED's" in the FD.	

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Selected	CHAR	1	no	no	Default is "n"	This field will be used when the Selected_Organization _ID table is eliminated	An indicator used for Organizations (Control 1-2s) that an Interactive Workforce Administrator has designated that will allow employees in these organizations to have access to ESS.	This field is initially populated with the default value of "n" when this record is created. The value can be changed by an Interactive Workforce Administrator via the the 'Select Organizations for Interactive Workforce Load' GUI page in the FD.

Company_Option_List

Definition: Company (Control 1-2) specific option lists (code sets) brought over from The Solution Series that are needed for a Self-Service application.

Source: This table is created at the time the create db script is executed. Records are created and values populated via a STAPI call to The Solution Series when an Interactive Workforce Administrator selects "Perform Extract" on the "Load Option Lists from The Solution Series " page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Option_List_ID	VARCHAR	4	no	yes			The identifier used in The Solution Series for a specific The Solution Series option list.	See table source above
Option_List_Country	VARCHAR	1	no	yes			A country specific indication for a particular option list.	See table source above
Organization_ID	VARCHAR	6	no	yes			The organization for which this option list is applicable	See table source above
Code	VARCHAR	14	no	yes			The codes that are applicable within a particular option list.	See table source above
Description	VARCHAR	20	yes	no			The descriptions that are related to the codes that are applicable within a particular option list.	See table source above
Active_Code	CHAR	1	yes	no			An indicator in The Solution Series that is used to designate codes as either active or inactive	See table source above

Day_One_Tracking

Definition: A table that provides indicators for each "day one" page or process that must be completed. Every indicator must be marked as completed for the employee user to be presented with the regular Interactive Workforce Home Page instead of the Day One Home Page.

Source: This table is created at the time the create db script is executed. A record is created for every employee user created by the load users script with each "flag" given a value of "I" for incomplete. Values are changed to "C" for completed when the user completes each piece of functionality in the day one process via the employee user GUI of the Interactive Workforce application. Records are not created for InitialAdm and administrator users.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Employee_ID (FK)	VARCHAR	10	no	yes			This is the number of the employee in the customer's The Solution Series system .	See table source above
Organization_ID	VARCHAR	6	no	yes			The organization to which the employee user belongs.	See table source above
Emergency_Contact_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Emergency Contact page has been accessed by the employee user.	See table source above
Tax_Form_Flag	CHAR	1	no	no	I	I=Incomplete	An indicated used by Interactive Workforce to determine whether or not the Tax Form page has been accessed by the employee user.	See table source above

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Direct_Deposit_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Direct Deposit pages have been accessed by the employee user.	See table source above
Telephone_Email_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Phone, Fax, E-mail page has been accessed by the employee user.	See table source above
Name_Address_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Name and Address pages have been accessed by the employee user.	See table source above
Marital_Status_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Marital Status page has been accessed by the employee user.	See table source above

Name	**Type**	**Siz e**	**Nulls**	**Primar y Key**	**Default Value**	**Comments**	**Definition**	**Source**
Family_Detail s_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Family Details pages have been accessed by the employee user.	See table source above
Emergency_D octor_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Emergency Doctor page has been accessed by the employee user.	See table source above
Other_Details _Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Other Personal Details page has been accessed by the employee user.	See table source above
Name	Type	Siz e	Nulls	Primary Key	Default Value	Comments	Definition	Source
Reimburseme nt_Acct_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Reimbursement Account pages have been accessed by the employee user.	See table source above

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Personal_Details	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine if all personal details pages have been completed. This is marked complete after all the flags above are marked complete.	See table source above
Import_Benefits_Info	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Important Information about Your Benefits page has been accessed by the employee user.	See table source above
Benefit_Eligibility	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not Benefits Eligibility page has been accessed by the employee user.	See table source above
Enroll_In_Benefits_Flag	CHAR	1	no	no	I	I=Incomplete	An indicator used by Interactive Workforce to determine whether or not the Initial Enrollment in Benefits process has been completed by the employee user.	See table source above

Direct_Deposit_HED

Definition: This table contains information needed by Interactive Workforce to display a user friendly direct deposit HED name to the employee user. It is also used to designate whether an HED is used for remaining net pay, expense reimbursement accounts, or supplemental direct deposit accounts so that the appropriate pages are displayed to the employee user.

Source: This table is created at the time the create db script is executed. Records are created when the Payroll Administrator accesses the "Set Up Direct Deposit Organizations" page via the Payroll Administrator GUI. Values for DD_TYPE are populated and values for HED_Display_Name are modified by entries made by the Payroll Administrator via the "Set Up Direct Deposit HED's" page in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
HED_Number	VARCHAR	3	no	yes			The unique identifier from The Solution Series of a direct deposit HED.	See table source above.
Organization_ID	VARCHAR	6	no	yes			The organization to which the employee user belongs as established in The Solution Series .	See table source above.
HED_Display_Name	VARCHAR	40	no	no			The name of the direct deposit deduction to be displayed to the employee user.	This field is initially populated with the HED_NAME from the A8_ESS The Solution Series form. A payroll administrator can change this value via the "Set Up Direct Deposit HED's" page.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
DD_Type	CHAR	1	yes	no		y=yes	The type of direct deposit, specifically, remaining net pay, expense reimbursement, supplemental.	See table source above.

ESS_Universal

Definition: This table is used for data that is needed by the Interactive Workforce system at the application level. It is applicable to the entire system, not a specific user, organization, or a specific piece of functionality.

Source: This table is created at the time the db create script is executed. One record is created and populated with the default values when the set initial values script is executed. These values can be changed by the Interactive Workforce Administrator through the "Set up Interactive Workforce account and password policies" GUI page in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Password_Lifetime	INTEGER		no	no	90	90 is the default	An Interactive Workforce indicator used to define the period of time that a password can be used before the user is required to change her password.	See table source above
Account_Lifetime	INTEGER		no	no	30	30 is the default	An Interactive Workforce indicator used to define the period of time that a user has to complete her initial logon to an Interactive Workforce application.	See table source above

Flex_Master

Definition: This table is used to establish and maintain information specific to Flex Master Plans that is needed by Interactive Workforce benefits enrollment so that the correct enrollment periods are displayed to the employee user. It also maintains data that allows information to be displayed to the employee user about excess credits in a flex plan as appropriate.

Source: This table is created when the create db script is executed. Records and values are created/changed/deleted from entries made by the Benefits Administrator via the Benefits Administrator GUI pages "Verify Organizations and Flex Plan Masters" and "Maintain Flex Plan Master Information - Step 2 of 2".

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Flex_Master_Plan_ID	VARCHAR	3	no	yes			This is the Flex Master Plan ID. This is MASTER-PLAN-ID from the TP-ESS form in The Solution Series .	A record is created and this value populated when a Benefits Administrator selects Flex Plan Masters on the "Verify Organizations and Flex Plan Masters" page in the FD. This page is populated via a STAPI call to the TP-ESS but only the selected information is stored in the Interactive Workforce database.
Flex_Master_Plan_Effective_Date	DATETIME		no	yes			This is the effective date of all plans under the Flex Master Plan. This is MASTER-PLAN-DATE from the TP-ESS form in The Solution Series .	Same as Flex_Master_Plan_ID above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_Number	CHAR	4	no	yes			The control number is used in The Solution Series to group sets of plans together. This TP-CONTROL-NUMBER from the TP-ESS form in The Solution Series . It is the same as MASTER-PLAN from the AY-SCR form in The Solution Series .	Same as Flex_Master_Plan_ID above.
Initial_Enrollment_Period	INTEGER		yes	no			This field designates the period of time in which an employee is eligible to complete her initial enrollment.	Value is populated by a Benefits Administrator via "Maintain Flex Plan Master Information - Step 2 of 2" page.
Open_Enrollment_Start_Date	DATETIME		yes	no			This field designates the beginning date of the open enrollment period specific to a flex master plan.	Same as Initial_Enrollment_Period above
Open_Enrollment_End_Date	DATETIME		yes	no			This field designates the end date of the open enrollment period specific to a flex master plan.	Same as Initial_Enrollment_Period above

Name	**Type**	**Siz e**	**Nulls**	**Primar y Key**	**Default Value**	**Comments**	**Definition**	**Source**
Excess_Credit _Message	CHAR	80	yes	no			This field is used by the customer to display a custom message to the employee regarding what she can do with excess flexible benefits credits.	Same as Initial_Enrollment_Period above
Name	Type	Siz e	Nulls	Primary Key	Default Value	Comments	Definition	Source
Master_Done	CHAR	1	yes	no			This indicator is used to display a done check on "Maintain Plan Information - Step 2 of 3" so a Benefits Administrator knows for which plans within a flex plan master she has completed Interactive Workforce set up.	Value indicating entry is completed is entered in the database when "Save Changes" on the "Maintain Flex Plan Master Information - Step 2 of 2" page is selected by a benefits administrator.

Intermediate_Cyborg_User

Definition: A staging table in which employee records from The Solution Series file 32 are placed temporarily.

Source: This table is created when the create database script is executed. Records are created and populated when the load users script is executed. See Detailed Design Specification for ESSXPT specific to the CSL (English Language) Report that is executed in The Solution Series to create File 32, an ASCII text file that can be accessed by the load users script.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Employee_ID	VARCHAR	10	no	yes			This is the number of the employee in the customer's The Solution Series system. EMPLOYEE-NUMBER in The Solution Series .	See table source above.
Organization_ID	VARCHAR	6	no	yes			The CONTROL-1-2 field is used to identify a company and the employees associated with the company. CONTROL-1-2 from option list SC43 in The Solution Series	See table source above.
Employee_First_Name	VARCHAR	15	no	no			The first name of the employee as entered in The Solution Series . EMP-FIRST-NAME on FF-SCR in The Solution Series	See table source above.

Name	**Type**	**Siz e**	**Nulls**	**Primar y Key**	**Default Value**	**Comments**	**Definition**	**Source**
Employee_Mi ddle_Name	VARCHAR	15	no	no	blank		The middle name of the employee as enter in The Solution Series . EMP-MIDDLE-NAME on FF-SCR in The Solution Series	See table source above.
Employee_La st_Name	VARCHAR	20	no	no			The last name of the employee as entered in The Solution Series .EMP-LAST-NAME on FF-SCR in The Solution Series	See table source above.
Status_Code	VARCHAR	2	yes	no			This is the employee's status as a result of the ACTIVITY-CODE entry in The Solution Series .	
RESULTING -EMP- STATUS on 01,04, 08, 09, 95, 96-SCR from option list HR10 in The Solution Series	See table source above.							
Name	Type	Siz e	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_3_Pr	VARCHAR	4	yes	no			An option in The Solution Series that is used along with CONTROL-4 through CONTROL-6 options to describe the location to which the employee's labor is to be charged. CONTROL-3-CODE on GG-SCR from code set PR019 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_4_Pr	VARCHAR	4	yes	no			An option in The Solution Series that is used along with CONTROL-3, CONTROL-5 and CONTROL-6 options to describe the location to which the employee's labor is to be charged. CONTROL-4-CODE on GG-SCR from option list PR029 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	**Type**	**Siz e**	**Nulls**	**Primar y Key**	**Default Value**	**Comments**	**Definition**	**Source**
Control_5_Pr	VARCHAR	4	yes	no			An option in The Solution Series that is used along with CONTROL-3, CONTROL-4 and CONTROL-6 options to describe the location to which the employee's labor is to be charged. CONTROL-5-CODE on GG-SCR from option list PR039 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.
Name	Type	Siz e	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_6_Pr	VARCHAR	4	yes	no			An option in The Solution Series that is used along with CONTROL-3 through CONTROL-5 options to describe the location to which the employee's labor is to be charged. CONTROL-6-CODE on GG-SCR from option list PR049 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_3_Hr	VARCHAR	4	yes	no			An option in The Solution Series that is used by the HR department along with CTRL-FOUR through CTRL-SIX options to describe a subdivision of the organization. CTRL-THREE on 05CSCR from option list HR439 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_4_Hr	VARCHAR	4	yes	no			An option in The Solution Series that is used by the HR department along with CTRL-THREE, CTRL-FIVE and CTRL-SIX options to describe a subdivision of the organization. CTRL-FOUR on 05CSCR from option list HR449 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	**Type**	**Siz e**	**Nulls**	**Primar y Key**	**Default Value**	**Comments**	**Definition**	**Source**
Control_5_Hr	VARCHAR	4	yes	no			An option in The Solution Series that is used by the HR department along with CTRL-THREE, CTRL-FOUR and CTRL-SIX options to describe a subdivision of the organization. CTRL-FIVE on 05CSCR from option list HR459 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.
Name	Type	Siz e	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Control_6_Hr	VARCHAR	4	yes	no			An option in The Solution Series that is used by the HR department along with CTRL-THREE throughCTRL-FIVE options to describe a subdivision of the organization. CTRL-SIX on 05CSCR from option list HR469 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Pay_Frequency	CHAR	1	yes	no			An option in The Solution Series that designates the employee's pay frequency. PAY-FREQUENCY-CODE on EF-SCR from option list PP29 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.
Union_Code	VARCHAR	5	yes	no			An option in The Solution Series that designates the employee's union. UNION-CODE on EG-SCR from option list PP429 in The Solution Series . The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Employment_ Date	VARCHAR	10	yes	no		This value is being loaded as a VARCHAR here but a smalldatetime field once it is moved into the Cyborg_User table.	This is the employee's date of employment. EMPLOYMENT-DATE on EF-SCR	See table source above.
Job_Code	VARCHAR	6	yes	no			An option in The Solution Series that designates the job the employee currently holds. JOB-CODE on 05-SCR or EI-ROLE on TA-SCR. The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.
Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Siz e	Nulls	Primar y Key	Default Value	Comments	Definition	Source
Job_Code_Ex tent	VARCHAR	4	yes	no			An option in The Solution Series that extends the JOB-CODE further defining the job the employee currently holds.JOB-CODE-EXTENT on 05-SCR or TA-SCR. The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.
Flsa_Class	CHAR	1	yes	no			Options in The Solution Series that are used to identify exempt vs. non-exempt Fair Labor Standards Act classifications of each JOB-CODE/JOB-CODE-EXTENT entry. FLSA-CLASS from option list HR13 on TA-SCR. The customer can modify the load users script to further refine the employee grouping that will have access to Interactive Workforce using this field.	See table source above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Initial_Password	VARCHAR	40	yes	no			This is a "custom" field provided to the customer to use if they want to reference an The Solution Series field to be used as the employee's Initial Password.	Load users script accessing The Solution Series file 32. This field will be null unless the customer has modified the JESSXPT script to specify a field in The Solution Series that they want to use for Initial_Password in ESS. For example, Social Security Number.
Login_Name	VARCHAR	30	yes	no			This is a "custom" field provided to the customer to use if they want to reference an The Solution Series field to be used as the employee's Login Name.	Load users script accessing The Solution Series file 32. This field will be null unless the customer has modified the JESSXPT script to specify a field in The Solution Series that they want to use for Initial_Password in ESS. For example, Social Security Number.
Internal_Processing	CHAR	1	yes	no			This is an indicator that the database uses as it verifies whether an Intermediate_Cyborg_User is already a Cyborg _User.	Populated during the load users script

Option_List

Definition: Non-company specific option lists (code sets) brought over from The Solution Series that are needed for a Interactive Workforce application.

Source: This table is created at the time the create db script is executed. Records are created and values populated via a STAPI call to The Solution Series when an Interactive Workforce Administrator selects "Perform Extract" on the "Load Option Lists from The Solution Series " page

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Option_List_ID	VARCHAR	4	no	yes			The identifier used in The Solution Series for a specific The Solution Series option list.	See table source above
Option_List_Country	VARCHAR	1	no	yes			A country specific indication for a particular option list.	See table source above
Code	VARCHAR	14	no	yes			The codes that are applicable within a particular option list.	See table source above
Description	VARCHAR	20	yes	no			The descriptions that are related to the codes that are applicable within a particular option list.	See table source above
Active_Code	CHAR	1	yes	no			An indicator in The Solution Series that is used to designate codes as either active or inactive	See table source above

Organization_Flex_Master

Definition: This table is used to relate a Flex Master Plan to the Organizations (Control 1-2s) to which the plan applies.

Source: This table is created when the create db script is executed. Records and values are added, modified and deleted by a Benefits Administrator via the Benefits Administrator GUI page "Verify Organizations and Flex Plan Masters."

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Flex_Master_Plan_ID (FK)	VARCHAR	3	no	yes			This is the Flex Master Plan ID. This is MASTER-PLAN-ID from the TP-ESS form in The Solution Series .	A foreign key originating from the Flex_Master table. See table source above.
Flex_Master_Plan_Effective_Date (FK)	DATETIME		no	yes			This is the effective date of all plans under the Flex Master Plan. This is MASTER-PLAN-DATE from the TP-ESS form in The Solution Series .	A foreign key originating from the Flex_Master table. See table source above.
Control_Number (FK)	VARCHAR	4	no	yes			The control number is used in The Solution Series to groups sets of plans together. This is the TP-CONTROL-NUMBER from the TP-ESS form in The Solution Series . It is the same as MASTER-PLAN from the AY-SCR form in The Solution Series .	A foreign key originating from the Flex_Master table. See table source above.
Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Organization_ID	VARCHAR	6	no	yes			Organizations (Control 1-2s) that an Interactive Workforce Administrator has designated that will allow employees in these organizations to have access to ESS.	A record is created for every selected organization that has an associated Flex Master Plan when a Benefits Administrator selects Flex Plan Masters on the "Verify Organizations and Flex Plan Masters" page in the FD. There is a query to the Selected_Organization_ID table and then a STAPI call to the TP-ESS for the information to be displayed on this page, but only the selected information is stored in the Interactive Workforce database.

Permission

Definition: This table stores the permission (write and erase, for example) the customer wants to allow a group of Interactive Workforce users to have to a particular feature of the system.

Source: This table is created when the create db script is executed. Records are created and populated with default values when the set initial values script is executed. An Interactive Workforce Administrator can change the value in the write field via the Interactive Workforce Administrator GUI page "Manage Pages and Processes." By selecting "turn off" on this page the permissions record is deleted. Selecting it again either as Full Functionality or View Only would create a record for this feature.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Permission_ Name	VARCHAR	50	no	no			The name of a page, process or feature that a customer may assign to a group.	See table source above
Write	CHAR	1	no	no			An indicator that determines whether the use has read only or write privleges to a permission (page, process, or feature).	See table source above
Erase	CHAR	1	no	no		Not used	<Reserved for future development>	
Group_Name (FK)	VARCHAR	30	no	no			The name of a group of Interactive Workforce users defined by the customer. Note: There is only one group in Interactive Workforce, consequently for this release does not have the ability to define groups.	See table source above

Relationship_Number

Definition: This table is for data that allows Interactive Workforce to generate unique numbers for dependents and beneficiaries that are required for the creation of records in The Solution Series .

Source: The table is generated during the create database script. Four records are created for every organization that is selected via the "Select Organizations for Interactive Workforce Load" page. Relationship_Number records are created at the same time as the Selected_Organization_Id records are created for every selected organization and populated with defaults or addition details. Starting_Value and Increment_Value can be changed specific to an organization by an HR Administrator or a Benefits Administrator via the HR Administrator GUI page "Dependent Numbering" or the Benefits Administrator GUI page "Beneficiary Numbering"in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Organization_ID	VARCHAR	6	no	yes			Organizations (Control 1-2s) that an Interactive Workforce Administrator has designated that will allow employees in these organizations to have access to ESS.	This field is a foreign key field from the Selected_Organization_ID. A records is created and this value populated when an HR or Benefits Administrator accesses the pages specified in table source above.
Relsp_Code (FK)	CHAR	2	no	yes			This code is used to distinguish between dependents and beneficiaries	This field is a foreign key field from the Relationship_Type table. It is populated at the same time as Organization_Id above.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Relsp_Sub_Code (FK)	CHAR	2	no	yes			This code is used to distinguish between spouse and other	This field is a foreign key field from the Relationship_Subtype table. It is populated at the same time as Organization_Id above.
Starting_Value	INTEGER		yes	no			This is the starting value of the numbering scheme that Interactive Workforce will apply specific to this organization, the type and the subtype	The default values are populated at the same time as Organization_Id above. An HR Administrator or a Benefits Administrator can change the default values via the "Dependent Numbering" and "Beneficiary Numbering" GUI pages.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Increment_Value	INTEGER		yes	no			This is the increment that will be used to determine the value of the number that Interactive Workforce will apply specific to this organization, the type and the subtype	The default values are populated at the same time as Organization_Id above. An HR Administrator or a Benefits Administrator can change the default values via the "Dependent Numbering" and "Beneficiary Numbering" GUI pages.

Relationship_Subtype

Definition: This table connects the code used for spouse and other to their description so the description can be displayed on the Admin GUI pages.

Source: This table is created when the create database script is executed. Two records are created and populated with default values when the set initial values script is executed.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Relsp_Sub_Code	CHAR	2	no	yes			This is a code value that distinguishes between spouse and other	See table source above
Description	VARCHAR	20	no	no			This is a description of the code value	See table source above

Relationship_Type

Definition: This table connects the code used for dependents and beneficiaries to their description so the description can be displayed on the Admin GUI pages.

Source: This table is created when the create database script is executed. Two records are created and populated with default values when the set initial values script is executed.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Relsp_Code	CHAR	2	no	yes			This is a code value that distinguishes between dependents and beneficiaries	See table source above
Description	VARCHAR	20	no	no			This is a description of the code value	See table source above

User_Group

Definition: A table used to assign client-specific groups to each Interactive Workforce user

Source: This table is created when the create db script is executed. A record is created for every Interactive Workforce user. A record for InitialAdm is created when the set initial values script is executed. Employee user records are created and values populated when the load users script is executed. Administrator records are created and values populated as administrators are added via the Interactive Workforce Administrator GUI page "Add an Administrator" n the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Group_Name (FK)	VARCHAR	30	no	yes			The name of a group of Interactive Workforce users defined by the customer. Note: There is only one group in Interactive Workforce consequently for this release the customer does not have the ability to define groups.	See table source above
Employee_ID (FK)	VARCHAR	10	no	yes			This is the number of the employee in the customer's The Administrative Solution system or the number assigned to an administrative user within the Interactive Workforce application.	See table source above
Organization_ ID	VARCHAR	6	no	yes			The organization to which the user belongs. The organizations for employee users comes from the Intermediate_Cyborg_User table. All administrators are assigned the organization of IW Adm when they are within the Interactive Workforce system.	See table source above

Valid_Status

Definition: This table is used for the statuses (Resulting Status of employees in The Solution Series) of the users that an Interactive Workforce Administrator has selected to have access to an Interactive Workforce application.

Source: This table is created at the time the create db script is executed. Records are created and values populated by an Interactive Workforce Administrator via the "Select Resulting Statuses for Interactive Workforce Load" GUI page in the FD.

Name	Type	Size	Nulls	Primary Key	Default Value	Comments	Definition	Source
Status_Code	VARCHAR	2	yes				Statuses of employees as defined in The Solution Series that an Interactive Workforce Administrator has designated that will allow employees with these status to have access to ESS.	See table source above

The Pay Information database

This section details the data tables of the Pay Information database:

PayInfo_Basics

Definition: A table that contains employee salary, start and end dates of pay cycle, and the check number for the pay date shown in the key

Name	Type	Size	Nulls	Primary Key	Definition
Employee_Id	VARCHAR	10	no	yes	Unique employee identifier, up to 10 characters in length.
Organization_Id	VARCHAR	6	no	yes	The Organization ID (previously Control 1-2) is used to identify a company and the employees associated with the company.
Pay_Date	SMALLDATETIME		no	yes	This is the date that appears on the pay check or automatic direct deposit slip.
Master_Number	VARCHAR	4	no	yes	A unique number assigned to each labor, history, multi-master and permanent master record on the file.
Period_Start	SMALLDATETIME		yes	no	This is the period begin date of the pay period for a specific pay frequency.
Period_End	SMALLDATETIME		yes	no	This is the period end date of the pay period for a specific pay frequency.
Salary_Rate_Indicator	CHAR	1	yes	no	This field is a non The Solution Series field. It looks at the Payment Code field on the EF-SCR in The Solution Series . If the Payment Code is a 1 or a 4, the employee is hourly and an ‘R’ is used to populate this field otherwise an ‘S’ is used.
Salary_Rate	DECIMAL	9,4	yes	no	This is the employee's hourly rate of pay (null if salary_rate_indicator = S).
Salary	DECIMAL	9,2	yes	no	This is the employee's Normal Salary for the pay period (null if salary_rate_indicator = R).
Org_Country_Code	CHAR	1	yes	no	This code indicates the country code of the organization or control 1-2.
Check_Number	VARCHAR	8	yes	no	This is the number on the pay check or automatic direct deposit slip of the pay information record.

PayInfo_Earning_Deductions

Definition: A table that contains employee HED information with current and YTD amounts for the pay date shown in the key.

Name	Type	Size	Nulls	Primary Key	Definition
Employee_Id (FK)	VARCHAR	10	no	yes	Unique employee identifier, up to 10 characters in length.
Organization_Id (FK)	VARCHAR	6	no	yes	The Organization ID (previously Control 1-2) is used to identify a company and the employees associated with the company.
Pay_Date (FK)	SMALLDATETIME		no	yes	This is the date that appears on the pay check or automatic direct deposit slip.
Master_Number (FK)	VARCHAR	4	no	yes	A unique number assigned to each labor, history, multi-master and permanent master record on the file.
HED_Number	VARCHAR	3	no	yes	Unique numeric identifier (key) for an HED.
Record_Type	CHAR	1	no	no	Record type. This field ties the detail to a specific basic pay record.
HED_Description	VARCHAR	15	yes	no	HED (Hours, Earnings and Deductions) name or description.
HED_Category_Code	CHAR	2	yes	no	HED (Hours, Earnings and Deduction) category code. This code identifies the HED type (Combo, earnings, deductions, etc).
Current_Amt	DECIMAL	12,2	yes	no	Current amount for this pay record.
Ytd_Amt	DECIMAL	12,2	yes	no	YTD amount for this pay record.
Current_Units_Hours	DECIMAL	12,2	yes	no	Number of hours or units. Only applies to the records with a record type of E (Earnings).

PayInfo_Employee

Definition: A table that contains employee name and social security number for the pay date shown in the key.

Name	Type	Size	Nulls	Primary Key	Definition
Employee_Id (FK)	VARCHAR	10	no	yes	Unique employee identifier, up to 10 characters in length.
Organization_Id (FK)	VARCHAR	6	no	yes	The Organization ID (previously Control 1-2) is used to identify a company and the employees associated with the company.
Pay_Date (FK)	SMALLDATETIME		no	yes	This is the date that appears on the pay check or automatic direct deposit slip.
Master_Number (FK)	VARCHAR	4	no	yes	A unique number assigned to each labor, history, multi-master and permanent master record on the file.
SSN	VARCHAR	12	yes	no	Social Security number of the employee.
Name_Prefix_Description	VARCHAR	20	yes	no	Description of the name's prefix (Mr., Mrs., Dr., and so forth).
First_Name	VARCHAR	15	yes	no	First name of the employee.
Middle_Name	VARCHAR	15	yes	no	Middle name of the employee.
Last_Name	VARCHAR	20	yes	no	Last name of the employee.
Name_Suffix_Description	VARCHAR	20	yes	no	Description of the name's suffix (III, Jr., and so forth).

PayInfo_Taxes

Definition: A table that contains employee tax information with current and YTD amounts for the pay date shown in the key.

Name	Type	Size	Nulls	Primary Key	Definition
Employee_Id (FK)	VARCHAR	10	no	yes	Unique employee identifier, up to 10 characters in length.
Organization_Id (FK)	VARCHAR	6	no	yes	The Organization ID (previously Control 1-2) is used to identify a company and the employees associated with the company.
Pay_Date (FK)	SMALLDATE TIME		no	yes	This is the date that appears on the pay check or automatic direct deposit slip.
Master_Number (FK)	VARCHAR	4	no	yes	A unique number assigned to each labor, history, multi-master and permanent master record on the file.
Tax_Id	VARCHAR	7	no	yes	Tax ID.
Tax_Description	VARCHAR	15	yes	no	Description of Tax ID.
Marital_Status_Description	VARCHAR	20	yes	no	Marital status description of the employee.
Tax_Dependents	TINYINT		yes	no	The number of tax dependents the employee is claiming.
Tax_Withheld_Current	DECIMAL	12,2	yes	no	The current amount of taxes being withheld.
Tax_Withheld_Ytd	DECIMAL	12,2	yes	no	The YTD amount of taxes being withheld.
Other_Tax_Withheld_Current	DECIMAL	12,2	yes	no	The current amount of the additional taxes being withheld.
Other_Tax_Withheld_Ytd	DECIMAL	12,2	yes	no	The YTD amount of the additional taxes being withheld.

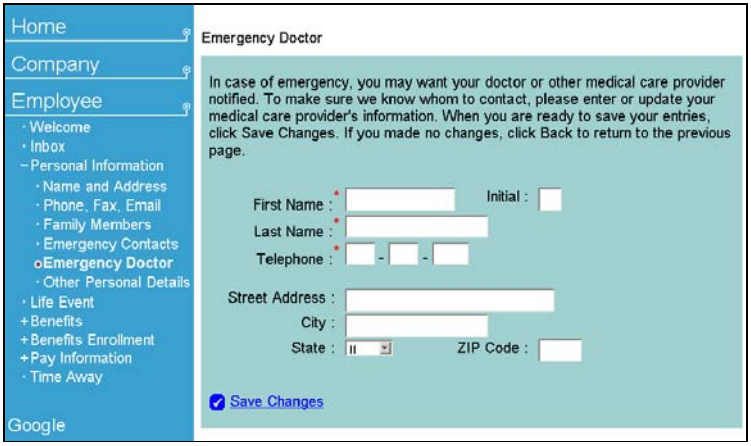
APPENDIX B

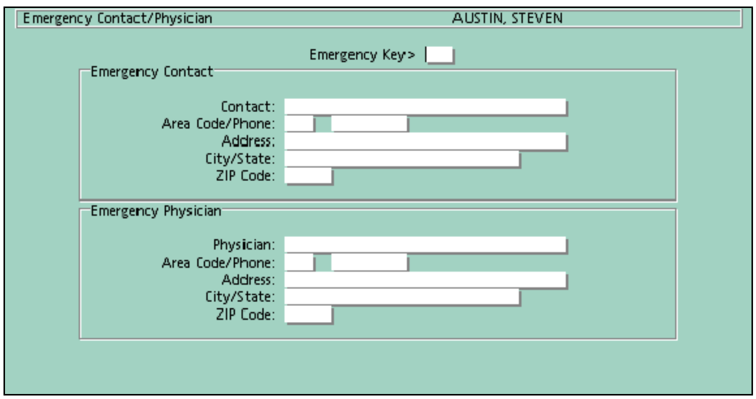
Views

In This Appendix

Introduction to Views

A View pulls information from a form in The Solution Series in order to map the data in a corresponding web page in Interactive Workforce. Here, you can see how Emergency Doctor page in Interactive Workforce corresponds to the Emergency Contact/Physician form (16-SCR) in The Solution Series.





Elements of a View

The typical structure of a View definition in the STAPI configuration file is shown here, with a table defining the parameters immediately following:

```
View=Emergency Physician
Parent=16-SCR
Remove=FALSE
Query=TRUE
Insert=TRUE
Update=TRUE
AccessPanel=FALSE
Field=EMERGENCY-KEY
Field=EMERGENCY-PHYSICIAN
Field=PHYSICIAN-AREA-CODE
Field=PHYSICIAN-PHONE-NBR
Field=PHYSICIAN-ADDRESS-1
Field=PHYSICIAN-CITY-ST
Field=PHYSICIAN-ZIP-CODE
Field=PHYSICIAN-CITY-PROV
Field=PHYSICIAN-POSTAL-CDE
```

Parameter	**Description**	**Valid Values**	**Example/ Default**
View	Alphanumeric name of the View. Used by the Java class files to identify a specific set of HR data.	Must be unique & alphanumeric Max char: 30	View= Emergency Physician
Parent	Identifies the name of the corresponding The Solution Series form.	Form name must exist in The Solution Series	Parent= 16-SCR
Remove	Defines if fields in View can be removed (deleted).	TRUE=active FALSE=inactiv e	Default= FALSE
Query	Defines if records in the View can be queried.	TRUE=active FALSE=inactiv e	Default= TRUE
Insert	Defines if records in the View can be added.	TRUE=active FALSE=inactiv e	Default= TRUE
Update	Indicates whether or not existing records in the View can be edited.	TRUE=active FALSE=inactiv e	Default= TRUE
AccessPan el	N/A	N/A	Default= FALSE

Parameter	Description	Valid Values	Example/ Default
Fields	This lists the field in The Solution Series that the View pulls information from Fields that repeat in The Solution Series form must be numbered by adding an @ plus the occurrence #.	Fieldname must exist in The Solution Series form	NAME-CODE ADDRESS ZIP-CODE HED-NUMBER@1 HED-NUMBER@2

View Definitions

This section lists each View available through Interactive Workforce, with tables defining each View. This can be used when reviewing and/or editing the View definitions within the STAPI configuration file.

Available Plans (AP-ESS)

Purpose: Shows all available plans, options, coverage and cost under a Flex umbrella. Also displays all plans, options, coverage and costs an employee is enrolled in under a Flex umbrella.
Access Permissions: Query.
Query Constraints: CompanyId, EmployeeId, ESS-FLEX/GRP-PLAN-ID, ESS-FLEX/GRP-DATE, ESS-FLEX-ACTN.
Optional Query Constraints: None.
Mandatory Query Constraints: All Query constraints are mandatory.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Codeset /Table
ESS-FLEX/GRP-PLAN-ID	This field is the Flex Master Plan ID to query for available plans or the Flex Master Plan ID to display all plans an employee is currently enrolled in.	Retrieve the Flex Master Plan ID from the benefit admin table and use it to send into this field.	3 alphanumeric characters.	
ESS-FLEX/GRP-DATE	This field represents the Effective Date of the Flex Master Plan.	Send in Current Date or Flex Effective Date (See AP-ESS Document for more detail on what date to send in).	10 alphanumeric characters (03-08-1972)	
ESS-FLEX-ACTN	This field represents the action you wish to execute.	Value will be either ‘O’, ‘I’ or ‘D’. (See AP-ESS Document for more detail on what date to send in).	1 alphanumeric character.	
ESS-FLEX-TYPE	This field represents TKF-DED-METHOD-ID from the TKFSCR	Value will be ‘C’ (Flex Master Plan has no credits), ‘P’ (Deduct Credits By Plan) or ‘N’ (Use Net Credits Method).	1 alphanumeric character.	Codeset BA70
ESS-FLEX-CREDIT-TYPE	This field represents TKF-CREDIT-CALC-RULE from the TKFSCR.	Either ‘B’ (Before Enrollment) ‘D’ (During Enrollment) or blank (None).	1 alphanumeric character.	Codeset BA71
ESS-FLEX-CREDITS	This field is the total Flex Credits field from the 55CSCR (FLEX-TOTAL-CREDITS)	Tells you how much Flex Credits an employee has to spend. If it is a display condition, it’s the amount the employee had before enrollment.	7 Numeric (9 Display length. Displays as: 99,999.99	

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Codeset /Table
ESS-CREDITS-APPLIED	This field is the total Flex Credits field from the 55CSCR (FLEX-CREDITS-APPLIED)	Tells you how much Flex Credits an employee has applied to their plans. Only useful when display option is used.	7 Numeric (9 Display length. Displays as: 99,999.99	
ESS-PLAN-ID	This is the PLAN-ID for the current plan being displayed.	Use this as the key to the benefit admin table to retrieve the plan group, category and plan name.	3 alphanumeric characters.	
ESS-PLAN-EFF-DATE	This is the date the employee will be enrolled in for the current plan being displayed	Use this to display to the user when the employee will become effective in this plan.	10 alphanumeric characters (03-08-1972)	
ESS-PLAN-VAR-ENT-FLG	Indicates if plan requires a variable entry.	Equal to 'V' if plan requires variable entry to calculate Coverage. Equal to 'C' if plan requires variable entry to calculate Contribution. Equal to 'N' or ' ' if plan does not.	1 alphanumeric characters.	
ESS-PLAN-VAR-FREQ	Indicates the frequency the amount entered will be taken from an employee's check.	If this field equals 'W", the frequency is weekly, if it is 'M' it is monthly, if it is 'A' it is annually and if it is 'P' it is per-pay-period.	1 alphanumeric characters.	
ESS-DED-TYPE-FLAGS	Indicates which deduction types are valid for the plan being displayed. This is a 3 byte field, each byte represents one of the deduction types.	The first byte is 'T' or 'F' and indicates Pre-tax deduction. The second byte is 'T' or 'F' and indicates Post-tax deduction. The third byte is 'T' or 'F' and indicates Company deduction.	3 alphanumeric characters.	
ESS-COVERAGE-FLAG	This field indicates if the option has a coverage amount attached to it (Insurance plans).	If this field equals a 'Y', the plan and option has a coverage amount. If it equals 'N', it does not.	1 alphanumeric characters.	

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Codeset /Table
ESS-PREV-VAR-AMT	This field represents the variable entry the employee made either currently or previously.	Amount is pulled from the VARIABLE-FACTOR on the 55-SCR. This field will only have a value if the plan being displayed is a variable entry type plan and they have been previously or currently enrolled in.	8 Byte Numeric in 999,999.99 Format.	
ESS-VAR-ENTRY-TYPE	This field represents the type of variable entry that is being displayed.	There are five categories. This one byte field contains a code that tells you what type of Variable Entry Plan that is being displayed. (See AP-ESS design document for more detail).	1 alphanumeric characters.	
ESS-PREV-FLEX-DATE	If the employee has a previous enrollment in the plan being displayed (previous being the date previous to the date entered in the ESS-FLEX/GRP-DATE) then this field will be equal to the Effective Date of the previous plan. This will work for all three options, "I", "D" and "O".	In ESS, this is used to determine if the employee has already gone through open enrollment or Initial Enrollment. If they did, this field would be equal to the field being sent into ESS.	10 alphanumeric characters (03-08-1972)	
ESS-AP-ERROR-MSG	This field is a text message if a problem occurs. Also used as a 'end of plans' indicator.	If this field equals '*** Complete ***' this indicates 'end of plans'. If it equals anything else, it is an Error message.	30 alphanumeric characters.	
ESS-OPTION-ELECTED (Repeats 9 times)	This field is either the first eligible option an employee is eligible for or, if the display option is in use, it is the option the employee is enrolled in. (This will be true for all the fields listed below)	This field is used as a secondary key to the benefit admin table. It is used to determine the option name (if it is different from the BA03 description) and whether the plan requires a dependent or beneficiary.	1 alphanumeric characters.	Codeset BA03

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Codeset /Table
ESS-PRE-TAX-PER-COST (Repeats 9 times)	This is the pre-tax per-pay-period cost of the particular option.	If this field is not equal to zero, then the employee has a “pre-tax” option for this option.	7 Numeric (9 Display length. Displays as: 99,999.99	
ESS-PRE-TAX-ANN-COST (Repeats 9 times)	This is the pre-tax annual cost of the particular option.	If this field is not equal to zero, then the employee has a “pre-tax” option for this option.	9 Numeric (12 Display length. Displays as: 9,999,999.99	
ESS-PRE-TAX-FLAG (Repeats 9 times)	This tells you whether option is a basic pre or supplemental pre type deduction. (May or may not used)	If this field is equal to ‘B’, it is Basic, if it is ‘S’, it is Supplemental.	1 alphanumeric characters.	
ESS-PST-TAX-PER-COST (Repeats 9 times)	This is the post-tax per-pay-period cost of the particular option.	If this field is not equal to zero, then the employee has a “post-tax” option for this option.	7 Numeric (9 Display length. Displays as: 99,999.99	
ESS-PST-TAX-ANN-COST (Repeats 9 times)	This is the post-tax annual cost of the particular option.	If this field is not equal to zero, then the employee has a “post-tax” option for this option.	9 Numeric (12 Display length. Displays as: 9,999,999.99	
ESS-CUR-ENROLLED (Repeats 9 Times)	This field is used as a flag to indicate if the employee is currently enrolled in the plan.	If this field is equal to 'P', it means the employee selected 'Pre-tax' for the option being displayed. If it is equal to 'S', it means the employee selected 'Post-tax'.	1 Alphanumeric Field	
ESS-PST-TAX-FLAG (Repeats 9 times)	This tells you whether option is a basic post or supplemental post type deduction. (May or may not use)	If this field is equal to ‘B’, it is Basic, if it is ‘S’, it is Supplemental.	1 alphanumeric characters.	
ESS-COM-PER-PAY-COST (Repeats 9 times)	This is the company per-pay-period cost of the particular option.	If this field is not equal to zero, then the company contributes money for this option.	7 Numeric (9 Display length. Displays as: 99,999.99	
ESS-COM-ANN-COST (Repeats 9 times)	This is the company annual cost of the particular option.	If this field is not equal to zero, then the company contributes money for this option.	9 Numeric (12 Display length. Displays as: 9,999,999.99	

The Solution Series Field Name	**Data Description**	**Usage**	**Data Format/Type**	**Codeset /Table**
ESS-COVERAGE-AMT (Repeats 9 times)	This field gives you the coverage amount for the option being displayed.	This is the amount of coverage for the plan and option in an annual amount.	9 Numeric (12 Display length. Displays as: 9,999,999.99	

Beneficiaries (58-SCR)

Purpose: This view queries an employee's beneficiaries. Beneficiaries must exist prior to assigning them to a benefit plan.
Access Permissions: Read, Update, Insert and Remove.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: BENEF-KEY.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
BENEF-KEY	This field contains a unique identification code to separate multiple beneficiary records.	Auto-generate when adding new record.	Alphanumeric field, 3 characters.	--
BENEF-RELATION-CODE	This field contains the code that identifies the beneficiary's relationship to the employee.	--	Alphanumeric, 2 characters.	HR28 – Relationship validates against HR29 - Sex Code
BENEFICIARY-NAME	This field contains the beneficiary's name in the following format: Last Name, First Name…	--	Alphanumeric, 30 characters.	--
BENEF-SOC-SECURITY	This field contains the Taxpayer Identification Number or Social Security Number of an institutional beneficiary.	May contain hyphens.	Alphanumeric, 12 characters	--
BENEF-SEX-CODE	This field contains the code that identifies the sex of the beneficiary.	--	Alphanumeric, 1 character.	HR29 – Sex Code validates against HR28 - Relationship
BENEF-BIRTH-DATE	This field contains the date of birth of the beneficiary.	--	Date field, 10-digits: MM-DD-CCYY.	--
BENEF-AREA-CODE	This field contains the area code portion of the beneficiary telephone number.	--	Numeric field, 3 digits.	--

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
BENEF-PHONE-NUMBER	This field contains the telephone number of the beneficiary.	--	Alphanumeric, 8 characters.	--
BENEF-ADDRESS	This field contains the street address portion of the beneficiary address.	--	Alphanumeric, 30 characters.	--
BENEF-ADDRESS-2	This field contains the supplemental address portion of the beneficiary address.	--	Alphanumeric, 30 characters.	--
BENEF-CITYThe Solution SeriesATE*	This field contains the city and state portion of the beneficiary address.	*Mutually exclusive – will never have both.	Alphanumeric, 30 characters.	--
BENEF-ZIP-CODE**	This field contains the zip code portion of the beneficiary address.	**Mutually exclusive – will never have both.	Alphanumeric, 5 characters.	-- --
BENEF-CITY/PROV *	This field contains the city and province portion of the beneficiary address.	*Mutually exclusive – will never have both.	Alphanumeric, 29 characters.	--
BENEF-POSTAL-CODE**	This field contains the postal code portion of the beneficiary address.	**Mutually exclusive – will never have both.	Alphanumeric, 6 characters.	--

Beneficiary Allocations (59BSCR)

Purpose: This view queries an employee's beneficiaries and their percent allocations in benefit plans. The employee must be enrolled in the benefit plan before the percents can be allocated and the beneficiary must exist.
Access Permissions: Query, Update and Insert.
Query Constraints: Employee ID, Company.
Optional Query Constraints: BENEFICIARY-PLAN-ID.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
BENEFICIARY-PLAN-ID	This field contains the identification number of a benefit plan for which the beneficiary has been elected.	--	Alphanumeric field, 3 characters.	TK Table Foreign key = TK-PLAN-ID
ALLOCATION-DATE	This field contains the effective date of a beneficiary election for a benefit plan.	--	Date field, 10 digits. MM-DD-CCYY.	--
PLAN-TYPE	This is the plan type from the TK-SCR.	--	Alphanumeric, 20 characters.	--
PLAN-NAME	The field contains the name assigned to a benefit plan.	--	Alphanumeric, 20 characters.	Reflects the plan name in the TK Table.
BENEFICIARY-XREF-1	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-1	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-2	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
PERCENT-ALLOCATED-2	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-3	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-3	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-4	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-4	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-5	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-5	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-6	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-6	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-7	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-7	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--
BENEFICIARY-XREF-8	This field contains the unique identifier of the beneficiary.	--	Alphanumeric, 3 characters.	58-SCR Foreign key = BENEF-KEY
W8-30-650	This field contains the beneficiary name in the following format: Last Name, First Name.	--	Alphanumeric, 30 characters.	--
PERCENT-ALLOCATED-8	This field contains the percent of total benefit to be allocated to the beneficiary.	--	Numeric field, 4 digits with 1 decimal: XXX.X that is, 050.0 equals 50%.	--

Company Pay Frequencies (AJ-SCR)

Purpose:
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
FREQUENCY-IDENTIFIER		N/A	N/A	N/A
ANNUALIZE-FACTOR		N/A	N/A	N/A

Contact Information (ME4SCR)

Purpose:
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EAAG-CELL-PHONE		N/A	N/A	N/A
EAAG-EMAIL		N/A	N/A	N/A
EAAG-EXTENSION		N/A	N/A	N/A
EAAG-HOME-PHONE		N/A	N/A	N/A
EAAG-MAIL-DIST		N/A	N/A	N/A
EAAG-WORK-PHONE		N/A	N/A	N/A

Covered Dependents (59DSCR)

Purpose: This view queries an employee's dependents that are enrolled in Welfare Benefit plans. Dependents must exist before they can be enrolled in a benefit plan.
Access Permissions: Query, Update and Insert.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: PLAN-ID-OD.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
PLAN-ID-OD	This field contains the identification number of a benefit plan for which the dependent is enrolled.	N/A	This alphanumeric field contains 3 characters.	TK Table Foreign key = TK-PLAN-ID N/A
DEPENDENT-DATE	This field contains the effective date of a spouse or dependent's coverage under the benefit plan.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
PLAN-TYPE	This field contains the description of the type of benefit plan.	N/A	This alphanumeric field contains 20 characters.	N/A
PLAN-NAME	The field contains the name assigned to the benefit plan.	N/A	This alpha field contains 20 characters.	References the plan name from the TK Table
DEPENDENT-1	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent’s name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-2	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent’s name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
DEPENDENT-3	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-4	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-5	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-6	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-7	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A

The Solution Series Field Name	**Data Description**	**Usage**	**Data Format/Type**	**Option list/Table**
DEPENDENT-8	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-9	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-10	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-11	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-12	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
DEPENDENT-13	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-14	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-15	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
DEPENDENT-16	This field contains the unique identifier of the dependent entitled to coverage under the associated benefit plan.	N/A	This alphanumeric field contains 3 characters.	10-SCR Foreign key = OTHER-KEY
W8-30-650	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A

Dependents (10-SCR)

Purpose: This view queries an employee's dependents.
Access Permissions: Query, Update and Insert.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: OTHER-KEY.
Mandatory Query Constraints: None.

Note *Deleting a dependent is not allowed in the event that the dependent is attached to an enrollment history record.*

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
OTHER-KEY	This field contains a unique identifier for an employee's spouse or dependent.	Auto-generate when adding a new record.	This alphanumeric field contains 3 characters.	N/A
RELATIONSHIP-CODE	This field contains the code that identifies the relationship of the spouse or dependent to the employee.	N/A	This alphanumeric field contains 2 characters.	HR28 – Relationship validates against HR29 - Sex Code
OTHER-NAME	This field contains the spouse or dependent's name in the following format: Last Name, First Name….	N/A	This alpha field contains 30 characters.	N/A
OTHER-SSN-1-3 OTHER-SSN-5-6 OTHER-SSN-8-11 or OTHER-SIN-1-3 OTHER-SIN-5-7 OTHER-SIN-9-11	This field contains the spouse or dependent taxpayer ID.	Mutually exclusive – will never have both.	These are numeric fields.	N/A
OTHER-SOC-SECURITY	N/A	N/A	N/A	N/A
OTHER-SEX-CODE	This field contains the code that identifies the sex of the spouse or dependent.	N/A	This alphanumeric field contains 1 character.	HR29 – Sex Code validates against HR28 - Relationship

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
OTHER-BIRTH-DATE	This field contains the birth date of the spouse or dependent.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
INSURANCE-CARRIER	This field contains the name of the spouse's or dependent's insurance carrier.	N/A	This alphanumeric field contains 10 characters.	N/A
OTHER-AREA-CODE	This field contains the area code portion of the spouse or dependent telephone number.	N/A	This numeric field contains 3 digits.	N/A
OTHER-PHONE-NUMBER	This field contains the phone number portion of the spouse or dependent telephone number.	N/A	This alphanumeric field contains 8 digits.	N/A
FULL-TIME-STUDENT	This field contains the code that indicates whether or not the spouse or dependent is a student and what level of school participation is involved.	N/A	This alphanumeric field contains 1 character.	HR30 – Student Status
EMPLOYER-NAME	This field contains the name of the spouse or dependent's employer.	N/A	This alphanumeric field contains 30 characters.	N/A
OTHER-ADDRESS-1	This field contains the street address portion of the employer's address for the spouse or dependent.	N/A	This alphanumeric field contains 30 characters.	N/A
OTHER-ADDRESS-2	This field contains the city and state portion of the employer's address for the spouse or dependent.	N/A	This alphanumeric field contains 30 characters.	N/A
OTHER-ZIP-CODE*	This is the zip code portion of the employer's address for the spouse or dependent.	*Mutually exclusive – will never have both.	This alphanumeric field contains 5 characters.	N/A
OTHER-ADDRESS-2C	This field contains the city and province portion of the employer's address for the spouse or dependent.	N/A	This alphanumeric field contains 29 characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
OTHER-POSTAL-CODE*	This is the postal code portion of the employer's address for the spouse or dependent.	*Mutually exclusive – will never have both.	This alphanumeric field contains 6 characters.	N/A

Direct Deposit (H9-SCR)

Purpose: This view is used to query an employee's direct deposit information for Net Pay and/or other possible 'Remaining Net Pay' deposit allocations.
Access Permissions: Query, Insert and Update.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraint: HED-NUMBER = 999 and/or any other Direct Deposit HED. (Allowable HED's will be set up in a table within the Interactive Workforce database by the Interactive Workforce Payroll Admin.)

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
HED-NUMBER	This is the unique number assigned to the particular Hours Earnings or Deduction being set up through the A8 form.	This field is not shown on any Interactive Workforce page but it is functionally used behind the page to manage direct deposit HED's.	This numeric field contains 3 digits. (REQUIRED FIELD FOR UPDATE.)	HED's 001 and 999 default on the employee's record. All others have to be set up at the company and the employee level to be activated.
W6-15-000	This field contains the description of the Deduction/Earning.	The description will be printed on the page but will not have a label. The description will be bolded and placed on top of the account information box.	This alphanumeric field contains 15 characters.	N/A
DIRECT-DEPOSIT-CODE	This field contains the code that defines whether to allow the HED to be directly deposited or not.	D = Direct Deposit 0 = No Direct Deposit (or check).	This alphanumeric field contains 1 character. (REQUIRED FIELD FOR UPDATE.)	PR08 - Direct Deposit Edit

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMPLOYEE-BANK-NUMBER	This field contains the code that defines the employee's bank routing number.	For Interactive Workforce this field is combined with the name and routing number stored in the option list PR07. It is displayed to the Interactive Workforce users together in a drop down list.	This numeric field contains 9 digits. (REQUIRED FIELD FOR UPDATE.)	PR07 – Valid ACH Routing Numbers
BANK-ACCOUNT-NUMBER	This field contains the employee's bank account number.	N/A	This alphanumeric field contains 17 characters. (REQUIRED FIELD FOR UPDATE.)	N/A
HED-DEDUCT-FREQ-CD	This field contains the option, which specifies if or when a deduction is to be taken for an employee. An entry is required in this field when you add an HED to an employee's record.	00 = Inactive. 01 = All pay cycles. 18 = All pay cycles including 9. (Other options are included in this list but these pertain to process.)	This numeric field contains 2 digits. (REQUIRED FIELD FOR UPDATE.)	PP08- Deduction Frequency
BANK-ACCOUNT	This option code is used to specify whether a paycheck is deposited into a checking or savings account.	# = None. 0 = Invalid code. 2 = Checking. 3 = Savings. Only options 2 and 3 will be allowed.	This alphanumeric field contains 1 character. (REQUIRED FIELD FOR UPDATE.)	PR06-Bank Account Type

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
HED-DEDUCT-ARREARS-CD	This field contains the option that determines the action to be taken when there is not enough money left for the deduction to be taken (arrears). If this field is left blank when the HED is added to the employee's record, the field will default to the value in the DEDUCTION-ARREAR-CD field on company HED (A8 form) for the HED number.	00-Skip arrears HED 999 will be the only option used from this option list.	This alphanumeric field contains 2 characters. (REQUIRED FIELD FOR UPDATE.)	PP10-Arrears
AMOUNT-PERCENT	The AMOUNT-PERCENT field is used in conjunction with the METHOD-CODE field to specify the rate or percentage used to calculate an earning/ deduction.	Enter an amount with two decimal places when ‘dollars’ is selected. Enter a percent as a whole number with two implied decimal places when ‘percent’ is selected. (For Example: 6.3% is entered as '630'.)	This numeric field contains 7 digits. Its edit length is 7 positions with 0 decimals. It is edited as ------9. (REQUIRED FIELD FOR UPDATE.)	N/A
HED-DEDUCT-METHOD-CD	This field contains the option, which determines how the deduction is calculated. The field appears as METHOD CODE on the H9 form.	00 and 01 = no deduction. 02 = Fixed Amount. 13 = Percent of Net Pay.	This alphanumeric field contains 2 characters. (REQUIRED FIELD FOR UPDATE.)	PP12-Deduction Method Code

Direct Deposit HEDs (A8-ESS)

Purpose: Shows all category '53' HEDs for all organizations on FILE02.
Access Permissions: Query.
Query Constraints: None.
Optional Query Constraints: None.
Mandatory Query Constraints: View Name.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-CONTROL-1-2@1 - ESS-CONTROL-1-2@20	This field represents the Organization ID that the HED being displayed belongs to. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	Used to hold Organization ID.	6 alphanumeric characters.	N/A
ESS-HED-NUMBER@1 - ESS-HED-NUMBER@20	This is the HED id for the Direct Deposit HED currently being displayed. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	Used to hold HED 'Number' (not necessarily a number).	3 alphanumeric characters.	N/A
ESS-HED-NAME@1 - ESS-HED-NAME@20	This is the HED name for the direct deposit HED that is currently being displayed. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	Used to hold name of HED being displayed.	15 alphanumeric characters.	N/A

Eligibility Summary Salary (40-ESS)

Purpose: This view queries an employee's salary history.
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
SALARY-EFFECTIVE	This field contains the effective date of the employee’s salary change.	Query the most recent record.	This is a 10-digit date field: MM-DD-CCYY.	N/A
ZF-KEY-SEPARATOR	This field is used as a separator is more than one salary change took place on the same day.	N/A	1 byte alphanumeric.	N/A
SALARY-CHANGE-TYPE	This field is the type of salary change an employee had. Example: Increase - Merit.	N/A	2 byte alphanumeric.	HR11
ANNUAL-SALARY	This field contains the employee’s annual salary.	N/A	This numeric field contains 9 digits with 2 decimals: X,XXX,XXX.XX.	N/A

Eligibility Summary Status (09-ESS)

Purpose: Interactive Workforce will access this screen in order to present the user's most recent employment status.
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Administrative Solution Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ACTIVITY-DATE	This is the date of the employee's status change.	N/A	Date field, 10-digits. MM-DD-CCYY.	N/A
ACTIVITY-CODE	This is the activity the employee had for the given ACTIVITY-DATE. For example: Change to Full time.	N/A	Alphanumeric 2 bytes.	HR09
ACTIVITY	This is the option list description for ACTIVITY-CODE.	N/A	Alphanumeric 20 bytes.	N/A
RESULTING-EMP-STATUS	The Employee Status History form (09-SCR) is used to view, in Display mode, each major activity and the resulting status on file for an employee. nteractive Workforce will display the employee's most recent status.	N/A	Alphanumeric 2 bytes.	HR10 Employee status
EMPLOYEE-STATUS	This is the option list description for RESULTING-EMP-STATUS.	N/A	Alphanumeric 20 bytes.	N/A

Emergency Contacts (16-SCR)

Purpose: This view queries an employee's emergency contacts.
Access Permissions: Query, Update, Insert and Remove.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: EMERGENCY-KEY.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMERGENCY-KEY	This field contains a unique identification code to separate multiple emergency contact records.	Auto-generate using next sequential number when adding new record.	This alphanumeric field contains 3 characters	N/A
EMERGENCY-CONTACT	This field contains the individual's name the employee has authorized to contact in an emergency in the following format: Last Name, First Name…	N/A	This alphanumeric field contains 30 characters.	N/A
EMERGENCY-AREA-CODE	This field contains the area code of the emergency contact's telephone number.	N/A	This numeric field contains 3 digits.	N/A
EMERGENCY-PHONE-NBR	This field contains the phone number portion of the emergency contact's telephone number.	N/A	This alphanumeric field contains 8 characters.	N/A
CONTACT-ADDRESS-1	This field contains the street address portion of the emergency contact's address.	N/A	This alphanumeric field contains 30 characters.	N/A
CONTACT-CITY-STATE*	This field contains the city and state portion of the emergency contact's address.	*Mutually exclusive – will never have both.	This alphanumeric field contains 25 characters.	N/A
CONTACT-ZIP-CODE**	This field contains the zip code portion of the emergency contact's address.	**Mutually exclusive – will never have both.	This alphanumeric field contains 5 characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
CONTACT-CITY-PROV*	This field contains the city and province portion of the emergency contact's address.	*Mutually exclusive – will never have both.	This alphanumeric field contains 24 characters.	N/A
CONTACT-POSTAL-CODE**	This field contains the postal code portion of the emergency contact's address.	**Mutually exclusive – will never have both.	This alphanumeric field contains 6 characters.	N/A
EMERGENCY-PHYSICIAN	This field contains the name of the physician the employee has authorized to contact in an emergency in the following format: Last Name, First Name…	N/A	30 alphanumeric characters.	N/A
PHYSICIAN-AREA-CODE	This field contains the area code of the emergency physician's telephone number.	N/A	3 numeric characters.	N/A
PHYSICIAN-PHONE-NBR	This field contains the phone number portion of the emergency physician's telephone number.	N/A	8 alphanumeric characters.	N/A

Emergency Physician (16-SCR)

Purpose: This view queries an employee's emergency physician.
Access Permissions: Query, Update and Insert.
Query Constraints: Employee ID, Company.
Optional Query Constraints: EMERGENCY-KEY.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMERGENCY-KEY	This field contains a unique identification code to separate multiple emergency contact records.	Auto-generate using next sequential number when adding new record.	3 alphanumeric characters.	N/A
EMERGENCY-PHYSICIAN	This field contains the name of the physician the employee has authorized to contact in an emergency in the following format: Last Name, First Name…	N/A	30 alphanumeric characters.	N/A
PHYSICIAN-AREA-CODE	This field contains the area code of the emergency physician's telephone number.	N/A	3 numeric characters.	N/A
PHYSICIAN-PHONE-NBR	This field contains the phone number portion of the emergency physician's telephone number.	N/A	8 alphanumeric characters.	N/A
PHYSICIAN-ADDRESS-1	This field contains the street address portion of the emergency physician's address.	N/A	30 alphanumeric characters.	N/A
PHYSICIAN-CITY-ST *	This field contains the city and state portion of the emergency physician's address.	*Mutually exclusive – will never have both.	25 alphanumeric characters.	N/A
PHYSICIAN-ZIP-CODE**	This field contains the zip code portion of the emergency physician's address.	**Mutually exclusive – will never have both.	5 alphanumeric characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
PHYSICIAN-CITY-PROV*	This field contains the city and province portion of the emergency physician's address.	*Mutually exclusive – will never have both.	24 alphanumeric characters.	N/A
PHYSICIAN-POSTAL-CDE**	This field contains the postal code portion of the emergency physician's address.	**Mutually exclusive – will never have both.	6 alphanumeric characters.	N/A

Employee Contact (EM-SCR)

Purpose: This view is used to query an employee's preferred methods of being contacted. Historical records may or may not be included depending upon whether they are stored in the database. The Interactive Workforce application must filter the records appropriately.
Access Permissions: Query, Remove, Insert and Update.
Query Constraints: CompanyId, EmployeeId.
Optional Query Constraints: CONTACT-TYPE-CD, CONTACT-EFFECTIVE.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
CONTACT-TYPE-CD	This field contains the code that defines the type of contact such as E-mail, FAX, cell phone and so forth.	N/A	This numeric field contains 2 characters.	HR74 – Contact Type
CONTACT-EFFECTIVE	This field contains the date the employee contact information is effective.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
CONTACT-EXPIRED	The field contains the date the employee contact information expires.	Not necessary	This is a 10-digit date field: MM-DD-CCYY.	N/A
CONTACT-SEQUENCE	This is a sequence Number. Should always be '01'.	N/A	Numeric 2 byte field	N/A
CONTACT-CONFID-CD	This field contains the code that indicates if the contact address can be used to send confidential information to the employee.	N/A	This alpha field contains 1 character.	HR00 – Yes/No indicator
CONTACT-UNLIST-CD	This field contains the code that indicates if the contact information should be made available to others without the employee’s permission.	N/A	This alpha field contains 1 character.	HR00 – Yes/No indicator
CONTACT-INFO	This field contains the contact number or address.	N/A	This alphanumeric field contains 50 characters.	N/A

Employee Personal Details (EF-SCR)

Purpose: This view queries an employee's name, employment date, date of birth.
Access Permissions: Query.
Query Constraints: CompanyId, EmployeeId.
Optional Query Constraints: EMP-NAME-CODE.
Mandatory Query Constraints: CompanyId, EmployeeId.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMP-NAME-CODE	This field contains the Name Code of the name being displayed.	N/A	This alphanumeric field contains 3 characters.	N/A
EMPLOYMENT-DATE (NOTE: Information may also be present on the Interactive Workforce User Table)	This is the date of employment.	N/A	Date field, 10 positions, including dashes. This is a century/key date, retained on the file in complement form. It is edited as: MM-DD-CCYY.	N/A
BIRTH-DATE	This is the employee's date of birth.	N/A	Date field, 10 positions, including dashes. This is a century/key date, retained on the file in complement form. It is edited as: MM-DD-CCYY.	N/A

Employee Time Away Requests (93HSCR)

Purpose:
Access Permissions: Query, Insert, Update.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ABSENT-DATE-H (key)		--	6 char century	--
ABSENT-TYPE-CODE-H (key)		--	2 char alphanumeric	TA01
ABS-KEY-H (key end)		--	1 char alphanumeric	TA01
ABS-KEY-DESC-H		--	1 char alphanumeric	HR70
ABS-NUM-OF-DAYS-H		--	2 char alphanumeric	--
ABS-WORK-YN-FLD-H		--	1 char alphanumeric	SC02
ABS-HOURS-H		--	4 char numeric 2 decimal	--
ABS-STATUS-H		--	2 char alphanumeric	TA07
ABS-STATUS-DESC-H		--	2 char alphanumeric	TA07
ABS-ACTION-H		--	N/A	--
ABS-UI-C12-H		--	6 char alphanumeric	--
ABS-UI-EE-H		--	10 char alphanumeric	--
ABS-UI-SEQ-H		--	6 char numeric	--

Flex Components (TP-ESS)

Purpose: Query only program that displays all Flex Masters and Component plans for all Organizations on FILE02. Replaces TP-Its main use will be for the Benefit Admin area of Interactive Workforce to extract all Flex Master Plan ID's and there component plans. Admin user will then select what Flex Master Plan ID they want for their organization.
Access Permissions: Query.
Query Constraints: View Name.
Optional Query Constraints: None.
Mandatory Query Constraints: View Name.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-CONTROL-1-2	This is the Organization ID that the Flex Master Plan belongs to.	Displays Organization ID that Flex Master belongs to.	6 alphanumeric characters.	N/A
TP-CONTROL-NUMBER	This is the field MASTER-PLAN from the AY-SCR.	Control Number is used to group sets of plans together. See Benefits Admin Document for more details on this field.	4 alphanumeric characters.	N/A
MASTER-PLAN-ID	This is the Flex Master Plan ID, which is the first key to this table.	This is one of the Flex Master Plan ID's that ESS-CONTROL-1-2 belongs to.	3 alphanumeric characters.	N/A
MASTER-PLAN-DATE	This is the second and last key to this table. It is the effective date of all plans under the Flex Master Plan.	This is the effective date that will be used for all the plans under this Flex Master Plan.	Date: Displayed as MM-DD-YYYY, 10 Characters.	N/A
The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-TP-PLANS (Repeats 10 Times, @1, @2, @3 etc..)	These are the ‘Component’ plans under the Flex Master Plan ID. Plans are extracted into 10 51-byte strings. Plan ID's are 3 bytes each, there can be up to 17 plans on each 'line'. Once spaces are encountered, the record is done. There can be up to 10 lines with 17 plans on each line.	These plans will be saved into the Interactive Workforce database for use in the ‘plan specific’ options for Benefits Admin.	51 alphanumeric characters (17 x 3).	N/A

Flex Components Query (TP2ESS)

Purpose: This program works similar to the TP-ESS program. This program allows you to query a specific TP record. By sending in specific Control Number, Flex Plan ID, and Effective Date, this program will return component plans matching you query.

Access Permissions: Query

Query Constraints: View Name, ESS-TP2-CNTRL-NUM, ESS-TP2-FLEX-ID, ESS-TP2-EFF-DATE.

Optional Query Constraints: None

Mandatory Query Constraints: View Name, ESS-TP2-CNTRL-NUM, ESS-TP2-FLEX-ID, ESS-TP2-EFF-DATE.

Error Messages: No error messages to translate.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Codeset/Table
ESS-TP-PLANS (Repeats 10 Times, @1, @2, @3 etc..)	These are the "Component" plans under the Flex Master Plan ID. Plans are extracted into 10 51-byte strings. Plan ID's are 3 bytes each, there can be up to 17 plans on each 'line'. Once spaces are encountered, the record is done. There can be up to 10 lines with 17 plans on each line.	These plans will be saved into the Interactive Workforce database for use in the "plan specific" options for Benefits Admin.	51 alphanumeric characters (17 x 3)	

Flexible Benefit Annual Plan Credits (55CSCR)

Purpose: The Flexible Benefit Annual Plan Credits form (55CSCR) is used to record the credits an employee is granted to purchase benefits under a flexible benefit plan. Text boxes are provided to record the disposition of the credit balance and to display credit amounts allocated to deferred plans and spending accounts.
This form entry is created either online or by a credit calculation program such as the Flexible Benefit Plan Personal Information report (4P-RPT).
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId, FLEX-PLAN-ID and FLEX-PLAN-YEAR.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
FLEX-PLAN-ID	This is the Flex Master Plan ID.	N/A	Alphanumeric, 3 characters.	N/A
FLEX-PLAN-YEAR	This is either the beginning date of the Flexible Benefit Plan or in the case of an employee who is eligible for a mid-year enrollment the date on which the employee was eligible for enrollment.	N/A	Date field, 10 positions, including dashes. Edited as: MM-DD-CCYY.	N/A
FLEX-TOTAL-CREDITS	This is the total number of credits awarded to the employee for the purpose of purchasing benefits under a Flexible Benefit Plan.	N/A	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A
FLEX-CR-POSTED-DATE	This is the Date the Flex Plan Entries were made.	No use as of yet.	Date field, 10 positions, including dashes. Edited as: MM-DD-CCYY.	N/A
FLEX-CREDITS-APPLIED	This is the amount of credits that were used to enroll in benefits.	Query this field to determine the annual amount that was spent on enrolling in benefit plans.	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A

The Solution Series Field Name	**Data Description**	**Usage**	**Data Format/Type**	**Option list/Table**
FLEX-CREDITS-REMAIN	This is the credits or dollars that the employee has left over to spend.	This will be the annual amount that the employee still has left after enrollment.	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A
FLEX-CREDITS-TO-CASH	The amount leftover that was moved to cash.	Query this field to tell you the annual amount of money that was converted to cash.	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A
FLEX-CR-DEDUCTION	The amount of money the employee went over.	This is the annual amount that the employee has had deducted due to overwithdrawel.	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A
FLEX-CR-TO-DEFERRED	This is the annual amount that went to a deferred type plan.	This annual amount reflects the amount of left over money an employee has elected to place in a deferred account.	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A
FLEX-CR-TO-SPENDING	This is the annual amount the employee has contributed to Flexible Spending Accounts.	N/A	Numeric field, 7 digits. Its edit length is 9 positions with 2 decimals. It is edited as --, ---. 99.	N/A

Flexible Benefit Delete (FUDESS)

Purpose: Insert only. Replaces Undo/Delete function from 55FSCR.
Access Permissions: Insert.
Query Constraints: CompanyId, EmployeeId, ESS-FLEX/GRP-PLAN-ID and ESS-FLEX/GRP-DATE.
Optional Query Constraints: None.
Mandatory Query Constraints: CompanyId, EmployeeId, ESS-FLEX/GRP-PLAN-ID and ESS-FLEX/GRP-DATE**.**

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-FLEX/GRP-PLAN-ID	This is the Flex Master Plan ID that you want to delete from The Solution Series for a particular employee.	Program uses this in combination with ESS-FLEX/GRP-DATE to determine what plan to delete.	3 alphanumeric characters.	N/A
ESS-FLEX/GRP-DATE	This is the Flex Master Plan Effective Date that you want to delete from The Solution Series for a particular employee.	Program uses this in combination with ESS-FLEX/GRP-PLAN-ID to determine what plan to delete.	10 Byte date field in MM-DD-YYYY Format.	N/A

Flexible Benefit Plan Enrollment (55FESS)

Purpose: Enroll employees into Flex Benefit Plans.
Access Permissions: Insert.
Query Constraints: CompanyId, EmployeeId, WORK-PLAN-ID, WORK-PLAN-DATE, WORK-PLAN-FLEX-ACTN, WORK-PLAN-CHG-REASON.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Administrative Solution Field Name	Data Description	Usage	Data Format/Type	Option list/Table
WORK-PLAN-ID	This field represents the Flex Master Plan ID.	This field will be retrieved from the benefit admin database	3 alphanumeric characters.	N/A
WORK-PLAN-DATE	This field represents the Effective Date of the Flex Master Plan.	Send in Current Date or Flex Effective Date. (See AP-ESS Document for more detail on what date to send in.)	10 alphanumeric characters (03-08-1972).	N/A
WORK-PLAN-FLEX-ACTN	This is the type of action that will take place.	This will be equal to ‘O’ (Open enrollment), ‘M’ (Mid-year enrollment) or ‘L’ (Life event Change).	1 alphanumeric character.	Option list BA64
WORK-PLAN-CHG-REASON	This is only used when the WORK-PLAN-FLEX-ACTN equals ‘L’. This is the reason for the change.	Since Life Event changes will not be supported for this release, this field will always be equal to a blank.	2 alphanumeric characters.	Option list BA63
ESS-PLAN01-ID (Repeats 33 Times)	This is the 1st – 33rd PLAN-ID the employee is enrolling in.	After employee completes all enrollment forms, all plans are sent into each of these 33 fields.	3 alphanumeric characters.	N/A
ESS-PLAN01-VARIABLE (Repeats 33 Times)	This is the 1st – 33rd variable amount for the plan.	If the plan requires a variable entry, move that amount into this field left justified.	9 Numeric (12 Display length). Input as: 9999999.99.	N/A
ESS-PLAN01-PRE-POST (Repeats 33 Times)	This is the 1st – 33rd pre or post tax indicator.	If this deduction is Basic Post, send in ‘1’. If it is Supplemental Post, send in ‘2’. If it is Basic Pre, send in ‘4’. If it is Supplemental Pre, send in ‘5’.	1 Numeric character.	N/A

The Administrative Solution Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-PLAN01-REASON (Repeats 33 Times)	This is the 1st – 33rd option the employee elected for the particular plan.	Send in the two-byte code value into this field.	3 alphanumeric characters.	N/A
WORK-CREDITS@1	After enrollment is complete, this is the total credits the employee had before enrollment from the 55CSCR (FLEX-TOTAL-CREDITS).	This is the total amount of credits the employee had before enrollment.	7 Numeric (9 Display length). Displayed as: 99,999.99.	N/A
WORK-CREDITS@2	After enrollment is complete, this is the total applied credits from the 55CSCR (FLEX-CREDITS-APPLIED).	This is the total amount of credits the employee used to enroll in all of the plans.	7 Numeric (9 Display length). Displayed as: 99,999.99.	N/A

FSA Balances (57-SCR)

Purpose: This view is used to query an employee's FSA benefit plans for a specific plan year. Historical records may or may not be included depending upon whether they are stored in the database. The Interactive Workforce application must filter the records appropriately.
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: FSA-PLAN-ID, FSA-FLEX-YEAR.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
FSA-PLAN-ID	This field contains the unique identifier of a specific benefit plan in which the employee is currently enrolled or will be eligible.	N/A	This alphanumeric field contains 3 characters.	TK Table Foreign key = TK-PLAN-ID
PLAN-NAME	This field contains the name associated with the benefit plan.	N/A	This alphanumeric field contains 20 characters.	References the plan name from the TK Table
PLAN-TYPE	This field contains the type of benefit (for example, health, disability, dental, life, and so forth.)	N/A	This alphanumeric field contains 20 characters	References the plan type from the TK Table
FSA-FLEX-YEAR	This field contains the year of the date that represents the first day of the flexible plan year.	N/A	This date field contains 2 digits.	N/A
FSA-BALANCE-DATE	This field contains the effective date of the flexible benefits plan spending account periodic balancing information.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
FSA-TOTAL-CREDITS	This field contains the total flexible benefit credits applied to an employee’s Flexible Spending Account.	N/A	This numeric field contains 8 digits with 2 decimals: XXX,XXX.XX that is, 500450.00 equals 500,450.00.	N/A
FSA-BALANCE	This field contains the employee’s Flexible Spending Account ending balance at the end of the accounting period.	N/A	This numeric field contains 8 digits with 2 decimals: XXX,XXX.XX that is, 500450.00 equals 500,450.00.	N/A

Manager Time Away Inbox (93NSCR)

Purpose: This view is used to ....
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
INBOX-ID (key)		N/A	16 char alphanumeric	N/A
INBOX-SEQ-NUMBER (key)		N/A	6 char alphanumeric	N/A
INBOX-ROUTING-NUM		N/A	1 char numeric	N/A
INBOX-CONTROL-1-2		N/A	6 char alphanumeric	N/A
INBOX-EMPLOYEE-NUM		N/A	10 char alphanumeric	N/A
INBOX-START-DATE		N/A	6 char complement	N/A
INBOX-REQUEST-TYPE		N/A	2 char alphanumeric	TA05
INBOX-OCCUR		N/A	1 char alphanumeric	HR10
INBOX-NUM-OF-DAYS		N/A	2 char numeric	N/A
INBOX-HOURS		N/A	4 char numeric 2 decimals	N/A

Marital Status (02-SCR)

Purpose: This view queries an employee's marital status. Historical records may or may not be included depending upon whether they are stored in the database. The Interactive Workforce application will have to filter the records appropriately.
Access Permissions: Query, Update and Insert.
Query Constraints: Employee ID, Company.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
RECORD-DATE	This field contains the effective date of the marital information.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
MARITAL-CODE	This field contains the code that identifies the employee's current marital status.	N/A	This alphanumeric field contains 1 character.	HR04 – Marital Status

Name and Address (FF-SCR)

Purpose: This view queries an employee's name and address.
Access Permissions: Query, Update, Insert and Remove.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: NAME-CODE.
Mandatory Query Constraints: EmployeeId, CompanyId.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMP-NAME-CODE	This field indicates the employee's primary address or mailing address.	001 = Primary Address 999 = Mailing Adress	This numeric field contains 3 digits	N/A
EMP-NAME-PREFIX	Contains the employee's name prefix.	N/A	N/A	HR36 – Name Prefix/Tile
EMP-NAME-SUFFIX	Contains the employee's name suffix.	N/A	N/A	HR37 – Name Suffix
EMP-LAST-NAME	Contains the employee last name.	N/A	20 alphanumeric characters.	N/A
EMP-FIRST-NAME	Contains the employee first name.	N/A	15 alphanumeric characters.	N/A
EMP-MIDDLE-NAME	Contains the employee middle name.	N/A	15 alphanumeric character.	N/A
ADDRESS	This field contains the street number and street name portion of the employee's address.	N/A	This alphanumeric field contains 30 characters.	N/A
ADDRESS-2	This field contains the supplemental address portion of an employee's address.	N/A	N/A	N/A
EMP-CITY-US	This field contains the city portion of the employee's address.	***Mutually exclusive—will never have both	This alphanumeric field contains 17 characters.	N/A
EMP-STATE*	Contains the state portion of the employee's address.	*Mutually exclusive – will never have both	2 alphanumeric characters.	N/A

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMP-ZIP-CODE**	This field contains the zip code portion of the employee's address.	**Mutually exclusive – will never have both	10 alphanumeric characters.	N/A
EMP-CITY-CANADA	This field contains the city portion of the employee's address.	***Mutually exclusive—will never have both	20 alphanumeric characters.	N/A
EMP-PROVINCE*	Contains the province portion of the employee's address.	*Mutually exclusive – will never have both	2 alphanumeric characters.	N/A
EMP-POSTAL-CODE**	This field contains the postal code portion of the employee's address.	**Mutually exclusive – will never have both	This alphanumeric field contains 6 characters.	N/A
EMP-COUNTRY-CODE	Contains the country portion of the employee's address.	N/A	N/A	HR05 – Citizenship Code

Other Personal Details (15-SCR)

Purpose: This view queries an employee's emergency medical information.
Access Permissions: Query, Update and Insert.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMERGENCY-DATE	This field contains the effective date of emergency information.	N/A	This is a 10-digit date field: MM-DD-CCYY	N/A
SMOKER-ID	This field identifies whether the employee is a smoker or not.	N/A	1 alphanumeric character.	HR – Yes/No indicator

Organization Extract (ORGESS)

Purpose: Query only. Retrieves Organizations that are on FILE02.
Access Permissions: Query.
Query Constraints: View Name.
Optional Query Constraints: None.
Mandatory Query Constraints: View Name.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
ESS-CONTROL-1-2@1 - ESS-CONTROL-1-2@20	This field represents the Organization ID that is being displayed. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	Organization ID.	6 alphanumeric characters.	N/A
ESS-COMPANY-NAME@1 - ESS-COMPANY-NAME@20	This field represents the Organization Name being displayed. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	This is the Organization Name.	30 alphanumeric characters.	N/A
ESS-COUNTRY-CODE@1 - ESS-COUNTRY-CODE@20	This value equals the Country Code for the Organization that is being displayed. There will be 20 rows returned for each 'page' extracted from The Solution Series @1 - @20. For example, if there are only 3 entries that are extracted the remaining 17 will be equal to "".	0 = US, 1 = Canada.	1 alphanumeric characters.	PP31

Personal Information (ME3SCR)

Purpose: This view is used to ....
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EMP-NAME-PREFIX		N/A	N/A	N/A
EMP-FIRST-NAME		N/A	N/A	N/A
EMP-MIDDLE-NAME		N/A	N/A	N/A
EMP-LAST-NAME		N/A	N/A	N/A
EMP-NAME-SUFFIX		N/A	N/A	N/A
ADDRESS		N/A	N/A	N/A
ADDRESS-2		N/A	N/A	N/A
EMP-CITY-US		N/A	N/A	N/A
EMP-STATE		N/A	N/A	N/A
EMP-ZIP-CODE		N/A	N/A	N/A
EMP-CITY-CANADA		N/A	N/A	N/A
EMP-PROVINCE		N/A	N/A	N/A
EMP-POSTAL-CODE		N/A	N/A	N/A
BIRTH-DATE		N/A	N/A	N/A
NATIVE-TONGUE		N/A	N/A	N/A
MARITAL-CODE		N/A	N/A	N/A
OTHER-NAME@1-18		N/A	N/A	N/A
RELATIONSHIP-CODE@1-18		N/A	N/A	N/A

Phone Numbers (03-SCR)

Purpose: The view queries an employee's telephone numbers. Historical records may or may not be included depending upon whether they are stored in the database. The Interactive Workforce application will have to filter the records appropriately.
Access Permissions: Read, update and Insert.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: one.

Note *Send blanks if the Interactive Workforce user desires to delete a record.*

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
BASIC-DATA-DATE	This field contains the effective date of the employee telephone number.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
HOME-AREA-CODE	This field contains the area code of the employee’s home telephone number.	N/A	This alphanumeric field contains 3 characters.	N/A
HOME-PHONE	This field contains the employee’s home telephone number.	N/A	This alphanumeric field contains 7 characters.	N/A
WORK-AREA-CODE	This field contains the area code of the employee’s work telephone number.	N/A	This alphanumeric field contains 3 characters.	N/A
WORK-PHONE	This field contains the area code of the employee’s work telephone number.	N/A	This alphanumeric field contains 7 characters.	N/A
WORK-EXTENSION	This field contains the employee’s work telephone extension number.	N/A	This alphanumeric field contains 4 characters.	N/A

Plan General Information (TM-ESS)

Purpose: Query only. Retrieves Control Number, Plan ID, Variable Entry Plan Indicator and Plan name.

Access Permissions: Query

Query Constraints: None

Optional Query Constraints: None

Mandatory Query Constraints: None

Error Messages: No error messages to translate.

The Solution Series Field Name	Data Description	Usage	Data Format/ Type	Codeset / Table
ESS-TM-CTRL-NUM-1@1- @20	There will be 20 entries in this first "Column". Each page will have 40 groups of entries. This represents the 1st, 3rd, 5th, etc records that are being extracted.	This is the Control Number that the plan belongs to.	4 alphanumeric characters	
ESS-TM-CTRL-NUM-2@1- @20	There will be 20 entries in this second "Column". Each page will have 40 groups of entries. This represents the 2nd, 4th, 6th, etc records that are being extracted.	This is the Control Number that the plan belongs to.	4 alphanumeric characters	
ESS-TM-PLAN-ID-1@1 - @20	There will be 20 entries in this first "Column". Each page will have 40 groups of entries. This represents the 1st, 3rd, 5th, etc records that are being extracted.	This is the Plan ID of the plan being displayed.	3 Alphanumeric Characters	
ESS-TM-PLAN-ID-2@1 - @20	There will be 20 entries in this second "Column". Each page will have 40 groups of entries. This represents the 2nd, 4th, 6th, etc records that are being extracted.	This is the Plan ID of the plan being displayed.	3 Alphanumeric Characters	
ESS-TM-VAR-IND-1@1 - @20	There will be 20 entries in this first "Column". Each page will have 40 groups of entries. This represents the 1st, 3rd, 5th, etc records that are being extracted.	This is the Variable Entry Indicator. This will be equal to "Y" if the plan being displayed is a variable entry type plan. Otherwise field will be equal to "N".	1 Alphanumeric Characters	

The Solution Series Field Name	Data Description	Usage	Data Format/ Type	Codeset / Table
ESS-TM-VAR-IND-2@1 - @20	There will be 20 entries in this second "Column". Each page will have 40 groups of entries. This represents the 2nd, 4th, 6th, etc records that are being extracted.	This is the Variable Entry Indicator. This will be equal to "Y" if the plan being displayed is a variable entry type plan. Otherwise field will be equal to "N".	1 Alphanumeric Characters	
ESS-TM-PLAN-NAME-1@1 - @20	There will be 20 entries in this first "Column". Each page will have 40 groups of entries. This represents the 1st, 3rd, 5th, etc records that are being extracted.	This is the Plan name of the plan being displayed.	20 Alphanumeric Characters	
ESS-TM-PLAN-NAME-2@1 - @20	There will be 20 entries in this second "Column". Each page will have 40 groups of entries. This represents the 2nd, 4th, 6th, etc records that are being extracted.	This is the Plan name of the plan being displayed.	20 Alphanumeric Characters	

Plan Options (TTOSCR)

Purpose:
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
TT-PLAN-ID		N/A	N/A	N/A
TT-OPTION		N/A	N/A	N/A

Remaining Time Off (93ASCR)

Purpose: This view is used to query an employee's paid time off balances. Historical records may or may not be included depending upon whether they are stored in the database. The Interactive Workforce application must filter the records appropriately.
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: REMAINING-YEAR-END.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
REMAINING-AS-OF-DATE	This field contains the as-of-date for the authorized time off category amounts.	N/A	This is a 10-digit date field: MM-DD-CCYY.	N/A
REMAINING-YEAR-END	This field contains the year end date of the period for the authorized time off category amounts.	Not necessary.	This is a 10-digit date field: MM-DD-CCYY.	N/A
REMAINING-COMP-TIME	This field contains the balance of comp time that an employee has.	N/A	This numeric field contains 5 digits with 2 decimals: XXX.XX that is, 040.25 equals 40.25.	N/A
REMAINING-EXC-ABSENT	This field contains the balance of excused absence time that an employee has.	N/A	This numeric field contains 5 digits with 2 decimals: XXX.XX that is, 040.25 equals 40.25.	N/A
REMAINING-HOLIDAY	This field contains the balance of holiday time that an employee has.	N/A	This numeric field contains 5 digits with 2 decimals: XXX.XX that is, 040.25 equals 40.25.	N/A
REMAINING-PERSONAL	This field contains the balance of personal time that an employee has.	N/A	This numeric field contains 5 digits with 2 decimals: XXX.XXthat is, 040.25 equals 40.25.	N/A
REMAINING-SICK-LEAVE	This field contains the balance of sick time that an employee has.	N/A	This numeric field contains 5 digits with 2 decimals: XXX.XX that is, 040.25 equals 40.25.	N/A

Staff Members (ME1SCR)

Purpose: This view is used to ....
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EAAG-DATA-LINE@1-20		N/A	N/A	N/A

Time Away Balance (93BSCR)

Purpose: This view is used to ....
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
WF-BOUNDARY-MONTH		N/A	N/A	N/A
WF-BOUNDARY-DAY		N/A	N/A	N/A
ABS-START-DATE				
TABLE-QUERY-DATE				
ABSENT-CODE-1				
ABSENT-CARRIED-1				
ABSENT-ENTITLE-1				
HOLD-ABS-1				
ABSENT-CODE-2				
ABSENT-CARRIED-2				
ABSENT-ENTITLE-2				
HOLD-ABS-2				
ABSENT-CODE-3				
ABSENT-CARRIED-3				
ABSENT-ENTITLE-3				
HOLD-ABS-3				
ABSENT-CODE-4				
ABSENT-CARRIED-4				
ABSENT-ENTITLE-4				
HOLD-ABS-4				

Work Information (ME2SCR)

Purpose: This view is used to ....
Access Permissions: Query.
Query Constraints: EmployeeId, CompanyId.
Optional Query Constraints: None.
Mandatory Query Constraints: None.

The Solution Series Field Name	Data Description	Usage	Data Format/Type	Option list/Table
EAAG-HIRE-DATE		N/A	N/A	N/A
EAAG-UNION		N/A	N/A	N/A
EI-UNION-DESC		N/A	N/A	N/A
EAAG-REVIEW-DATE		N/A	N/A	N/A
EAAG-NEXT-REVIEW		N/A	N/A	N/A
EAAG-POSITION		N/A	N/A	N/A
EAAG-POSITION-CODE		N/A	N/A	N/A
EAAG-LOCATION		N/A	N/A	N/A
EAAG-SALARY		N/A	N/A	N/A
EAAG-ANNUAL-SAL		N/A	N/A	N/A

APPENDIX C

Field Information Table

In This Appendix

Introduction to Appendix

The dependent numbering data entered by the HR administrator is stored in the Interactive Workforce database. The table that follows provides information about the fields on the Dependent Numbering page in Interactive Workforce. The information is entered by organization (Control 1-2s). Using this table you can map the fields on the Interactive Workforce page to the corresponding fields on the The Solution Series forms. Some field in Interactive Workforce are derived from fields in The Solution Series and, as such, do not have a direct one-to-one correlation. Other fields do not exist in The Solution Series and are entered in Interactive Workforce and stored in the Interactive Workforce database or Pay Information database. They are Interactive Workforce specific fields.

The The Solution Series forms A8-Interactive Workforce (Direct Deposit HEDs), ORGInteractive Workforce (Organization Extract), and TP-Interactive Workforce (Verify Organizations and Flex Master Plans) were developed for Interactive Workforce to retrieve company data from the Employee database (FILE02). A8-ESS, ORGESS, and TP-Interactive Workforce are designated as private forms because they are invisible to users of The Solution Series. They work 'behind the scenes' and can not be accessed by users. These forms correlate to The Solution Series forms A8-SCR (Company Earnings and Deductions), COLIST (Organization Listing), and TP-SCR (Flex Master/Group Plan Components). The APInteractive Workforce program searches for and organizes the benefits information that displays in Interactive Workforce.

Interactive Workforce is a North American product. Some differences exist for US and Canadian fields as indicated by the Country column. The 'All' designation indicates that the field is applicable for Canadian and US users.

Field Information Table

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Dependent Numbering	Organization Number	CONTROL 1-2	ORGESS	All
Dependent Numbering	Organization Name	COMPANY NAME	ORGESS	All
Dependent Numbering	Spouse: Starting Value	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Dependent Numbering	Spouse: Increment	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Dependent Numbering	All Other Dependents: Starting Value	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Dependent Numbering	All Other Dependents: Increment	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Set Up Direct Deposit HEDs	Organization Number	COMPANY-NUMBER	N/A-Interactive Workforce specific field	All
Set Up Direct Deposit HEDs	Organization Name	COMPANY-NAME	N/A-Interactive Workforce specific field	All
Set Up Direct Deposit HEDs	HED Number	COMPANY-HED-NUMBER	A8-ESS	All
Set Up Direct Deposit HEDs	HED Name	HED_NAME	A8-ESS	All
Set Up Direct Deposit HEDs	Remaining Net Pay Account	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Set Up Direct Deposit HEDs	Expense Reimbursement Account	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Set Up Direct Deposit HEDs	Supplemental Direct Deposit Accounts	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Set Up Direct Deposit HEDs	Do you want employees in this organization to have the option of receiving a check?	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Verify Organizations and Flex Master Plans	Number and Effective Date (for current ye ar flex master plan)	MASTER-PLAN-ID, MASTER-PLAN-DATE	TP-ESS	All
Verify Organizations and Flex Master Plans	Number and Effective Date (for next year flex master plan)	MASTER-PLAN-ID, MASTER-PLAN-DATE	TP-ESS	All
New User Marital Status	Married, Single, Divorced, or any custom options set by your organization	MARITAL-CODE	02-SCR	All
Marriage Checklist	Married on	RECORD-DATE	02-SCR	All
Divorce Checklist	Marital Status	MARITAL-CODE	02-SCR	All
Divorce Checklist	Effective from	RECORD-DATE	02-SCR	All
Name and Address	N/A	EMP-NAME-CODE	FF-SCR	All
Name and Address	Title	EMP-NAME-PREFIX	FF-SCR	All
Name and Address	First Name	EMP-FIRST-NAME	FF-SCR	All
Name and Address	Middle Name or Initial	EMP-MIDDLE-NAME	FF-SCR	All
Name and Address	Last Name	EMP-LAST-NAME	FF-SCR	All
Name and Address	Suffix	EMP-NAME-SUFFIX	FF-SCR	All
Name and Address	Street Address	ADDRESS		
ADDRESS-2	FF-SCR	All		

Interactive Workforce Page Name	**Interactive Workforce Field Label**	**The Solution Series Field Name**	**The Solution Series Form**	**Country**
Name and Address	City	EMP-CITY-US	FF-SCR	US
Name and Address	City	EMP-CITY-CANADA	FF-SCR	Canada
Name and Address	State	EMP-STATE	FF-SCR	US
Name and Address	Zip Code	EMP-ZIP-CODE	FF-SCR	US
Name and Address	Province	EMP-PROVINCE	FF-SCR	Canada
Name and Address	Postal Code	EMP-POSTAL-CODE	FF-SCR	Canada
Name and Address	Country	EMP-COUNTRY CODE	FF-SCR	All
Mailing Address	N/A	EMP-NAME-CODE	FF-SCR	All
Mailing Address	Title	EMP-NAME-PREFIX	FF-SCR	All
Mailing Address	First Name	EMP-FIRST-NAME	FF-SCR	All
Mailing Address	Middle Name or Initial	EMP-MIDDLE-NAME	FF-SCR	All
Mailing Address	Last Name	EMP-LAST-NAME	FF-SCR	All
Mailing Address	Suffix	EMP-NAME-SUFFIX	FF-SCR	All
Mailing Address	Street Address	ADDRESS		
ADDRESS-2	FF-SCR	All		
Mailing Address	City	EMP-CITY-US	FF-SCR	US
Mailing Address	City	EMP-CITY-CANADA	FF-SCR	Canada
Mailing Address	State	EMP-STATE	FF-SCR	US
Mailing Address	Zip Code	EMP-ZIP-CODE	FF-SCR	US
Mailing Address	Province	EMP-PROVINCE	FF-SCR	Canada
Mailing Address	Postal Code	EMP-POSTAL-CODE	FF-SCR	Canada
Mailing Address	Country	EMP-COUNTRY CODE	FF-SCR	All
Phone, Fax and Email	Home Phone	HOME-AREA-CODE		
HOME PHONE	03-SCR	All		
Phone, Fax and Email	Work Phone	WORK-AREA CODE		
WORK PHONE	03-SCR	All		
Phone, Fax and Email	Extension	WORK EXTENSION	03-SCR	All
Phone, Fax and Email	Cell Phone	CONTACT-TYPE-CD	EM-SCR	All
Phone, Fax and Email	Cell Phone	CONTACT-INFO	EM-SCR	All

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Phone, Fax and Email	Fax Number	CONTACT-TYPE-CD	EM-SCR	All
Phone, Fax and Email	Fax Number	Contact Info	EM-SCR	All
Phone, Fax and Email	Pager Number	CONTACT-TYPE-CD	EM-SCR	All
Phone, Fax and Email	Pager Number	CONTACT-INFO	EM-SCR	All
Phone, Fax and Email	Email Address	CONTACT-TYPE-CD	EM-SCR	All
Phone, Fax and Email	Email Address	CONTACT-INFO	EM-SCR	All
Phone, Fax and Email	Confiden-			
tial Info	CONTACT-CONFID-CD	EM-SCR	All	
Phone, Fax and Email	Colleagues and customers	CONTACT-UNLIST-CD	EM-SCR	All
Family Members	None	OTHER-NAME	10-SCR	All
Family Members	None	RELATIONSHIP-CODE	10-SCR	All
Family Members	Birth date	OTHER-BIRTH-DATE	10-SCR	All
Family Members	Social Security Number	OTHER-SSN-1-3		
OTHER-SSN-5-6				
OTHER-SSN-8-11	10-SCR	US		
Family Members	Social Insurance Number	OTHER-SIN-1-3		
OTHER-SIN-5-7				
OTHER-SIN-9-11	10-SCR	Canada		
Family Member Details	N/A	OTHER-KEY	01-SCR	All
Family Member Details	First Name			
	OTHER-NAME	10-SCR	All	
Family Member Details	Last Name	OTHER-NAME	10-SCR	All
Family Member Details	First Name			

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Last Name	OTHER-NAME	10-SCR	All	
Family Member Details	Relation-			
ship	RELATIONSHIP-CODE	10-SCR	All	
Family Member Details	Birth date	OTHER-BIRTH-DATE	10-SCR	All
Family Member Details	Social Security Number	OTHER-SSN-1-3		
OTHER-SSN-5-6				
OTHER-SSN-8-11	10-SCR	US		
Family Member Details	Social Insurance Number	OTHER-SIN-1-3		
OTHER-SIN-5-7				
OTHER-SIN-9-11	10-SCR	Canada		
Family Member Details	Gender	OTHER-SEX-CODE	10-SCR	All
Family Member Details	Student Status	FULL-TIME-STUDENT	10-SCR	All
Family Member Details	Other Insurance	INSURANCE-CARRIER	10-SCR	All
Family Member Details	Employer	EMPLOYER-NAME	10-SCR	All
Family Member Details	Street address	OTHER-ADDRESS-1	10-SCR	All
Family Member Details	City	OTHER-ADDRESS-2	10-SCR	All??
Family Member Details	State	OTHER-ADDRESS-2	10-SCR	US
Family Member Details	City			
State	OTHER-ADDRESS-2	10-SCR	US	
Family Member Details	ZIP Code	OTHER-ZIP-CODE	10-SCR	US
Family Member Details	City	OTHER-ADDRESS-2C	10-SCR	Canada
Family Member Details	Province	OTHER-ADDRESS-2C	10-SCR	

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Family Member Details	City			
Province	OTHER-ADDRESS-2C	10-SCR	Canada	
Family Member Details	Postal Code	OTHER-POSTAL-CODE	10-SCR	Canada
Family Member Details	Telephone	OTHER-AREA-CODE		
OTHER-PHONE-NUMBER	10-SCR	All		
Emergency Contacts	None	EMERGENCY-CONTACT	16-SCR	All
Emergency Contacts	None	EMERGENCY-AREA-CODE		
EMERGENCY-PHONE-NBR	16-SCR	All		
Emergency Contact Details	N/A	EMERGENCY-KEY	16-SCR	All
Emergency Contact Details	First Name	EMERGENCY-CONTACT	16-SCR	All
Emergency Contact Details	Initial	EMERGENCY-CONTACT	16-SCR	All
Emergency Contact Details	Last Name	EMERGENCY-CONTACT	16-SCR	All
Emergency Contact Details	Telephone	EMERGENCY-AREA-CODE		
EMERGENCY-PHONE-NBR	16-SCR	All		
Emergency Contact Details	Street Address	CONTACT-ADDRESS-1	16-SCR	All
Emergency Contact Details	City	CONTACT-CITY-STATE	16-SCR	US
Emergency Contact Details	State	CONTACT-CITY-STATE	16-SCR	
Emergency Contact Details	ZIP Code	CONTACT-ZIP-CODE	16-SCR	US
Emergency Contact Details	City	CONTACT-CITY-PROV	16-SCR	Canada

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Emergency Contact Details	Province	CONTACT-CITY-PROV	16-SCR	Canada
Emergency Contact Details	Postal Code	CONTACT-POSTAL-CODE	16-SCR	Canada
Emergency Doctor	N/A	EMERGENCY-KEY	16-SCR	All
Emergency Doctor	First Name			
	EMERGENCY-PHYSICIAN	16-SCR	All	
Emergency Doctor	Initial	EMERGENCY-PHYSICIAN	16-SCR	All
Emergency Doctor	Last Name	EMERGENCY-PHYSICIAN	16-SCR	All
Emergency Doctor	Telephone	PHYSICIAN-AREA-CODE		
PHYSICIAN-PHONE-NBR	16-SCR	All		
Emergency Doctor	Street Address	PHYSICIAN-ADDRESS-1	16-SCR	All
Emergency Doctor	City	PHYSICIAN-CITY-ST	16-SCR	US
Emergency Doctor	State	PHYSICIAN-CITY-ST	16-SCR	US
Emergency Doctor	City	PHYSICIAN-CITY-PROV	16-SCR	Canada
Emergency Doctor	Province	PHYSICIAN-CITY-PROV	16-SCR	Canada
Emergency Doctor	ZIP Code	PHYSICIAN-ZIP-CODE	16-SCR	US
Emergency Doctor	Postal Code	PHYSICIAN-POSTAL-CDE	16-SCR	Canada
Other Personal Details	Do you smoke?	SMOKER-ID	15-SCR	All
Direct Deposit (primary account only)	N/A-no label			
The description of HED 999 displays as edited within the Interactive Workforce Payroll Admin function.	HED-NAME			
(W6-15-00—working storage field name)	H9-SCR	All		
Direct Deposit (primary account only)	N/A-no label			

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
The bank name and routing number display.	EMPLOYEE-BANK-NUMBER	H9-SCR	All	
Direct Deposit (primary account only)	Account Number	BANK-ACCOUNT	H9-SCR	All
Direct Deposit (primary account only)	Account Type	ACCOUNT TYPE	H9-SCR	All
Primary Account Details	N/A-no label. The description of HED 999 displays as edited within the Interactive Workforce Payroll Admin function.	HED-NAME		
(W6-15-00—working storage field name)	H9-SCR	All		
Primary Account Details	Bank name and routing number	EMPLOYEE-BANK-NUMBER	H9-SCR	All
Primary Account Details	Account Number	BANK-ACCOUNT	H9-SCR	All
Primary Account Details	Account Type	BANK-ACCOUNT-TYPE	H9-SCR	All
Primary Account Details	'Delete' link and associated explanatory text	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Direct Deposit (additional accounts)	N/A-no label			
The description of HED 999 displays as edited within the Interactive Workforce Payroll Admin function.	W6-15-00	H9-SCR	All	
Direct Deposit (additional accounts)	N/A-no label			

Interactive Workforce Page Name	**Interactive Workforce Field Label**	**The Solution Series Field Name**	**The Solution Series Form**	**Country**
The bank name and routing number display.	EMPLOYEE-BANK-NUMBER	H9-SCR	All	
Direct Deposit (additional accounts)	Account Number	BANK-ACCOUNT	H9-SCR	All
Direct Deposit (additional accounts)	Show me how it works if I have more than one direct deposit.	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Direct Deposit (additional accounts)	Additional Accounts	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Direct Deposit (additional accounts)	Active	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Direct Deposit (additional accounts)	Additional Account 'n'	HED name, as edited in Interactive Workforce Payroll Admin	N/A-Interactive Workforce specific field	All
Direct Deposit (additional accounts)	N/A-no label			
The bank name and routing number display.	EMPLOYEE-BANK NUMBER	H9-SCR	All	
Direct Deposit (additional accounts)	Account Number	BANK-ACCOUNT	H9-SCR	All
Direct Deposit (additional accounts)	Account Type	ACCOUNT TYPE	H9-SCR	All
Direct Deposit (additional accounts)	Deposit	AMOUNT-PERCENT	H9-SCR	All
Additional Account Details	Additional Account 'n'			

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
The description of the HED displays as edited within the Interactive Workforce Payroll Admin function	HED-NAME			
(W6-15-00—working storage field name)	H9-SCR	All		
Additional Account Details	Bank name and routing number:	EMPLOYEE-BANK-NUMBER	H9-SCR	All
Additional Account Details	Account Number	BANK-ACCOUNT	H9-SCR	All
Additional Account Details	Account Type	BANK-ACCOUNT-TYPE	H9-SCR	All
Additional Account Details	Deposit Amount	AMOUNT-PERCENT	H9-SCR	All
Additional Account Details	'Dollars ($)' and 'Percent (%)' of Remaining Net Pay	AMOUNT-PERCENT	H9-SCR	All
Additional Account Details	‘Delete’ link	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Additional Account Details	‘Account active’ button	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Reimbursement Account	Radio button: Payment by Check	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Reimbursement Account	Radio button: Other account information	N/A-Interactive Workforce specific field	N/A-Interactive Workforce specific field	All
Reimbursement Account Details	Bank name and routing number:	EMPLOYEE-BANK-NUMBER	H9-SCR	All
Reimbursement Account Details	Account Number	BANK-ACCOUNT	H9-SCR	All

Interactive Workforce Page Name	Interactive Workforce Field Label	The Solution Series Field Name	The Solution Series Form	Country
Reimbursement Account Details	Account Type	BANK-ACCOUNT-TYPE	H9-SCR	All
Time Balances	Vacation	REMAINING-VACATION	93ASCR	All
Time Balances	Personal	REMAINING-PERSONAL	93ASCR	All
Time Balances	Sick	REMAINING-SICK-LEAVE	93ASCR	All
Time Balances	Holiday	REMAINING-HOLIDAY	93ASCR	All
Time Balances	Excused absence	REMAINING-EXC-ABSENT	93ASCR	All
Time Balances	Comp time	REMAINING-COMP-TIME	93ASCR	All
Time Balances	Remaining hours as of…	REMAINING-AS-OF-DATE	93ASCR	All

APPENDIX D

Configuration Parameters

In This Appendix

About this appendix

This appendix lists the configuration files and parameters in Interactive Workforce.

Interactive Workforce properties file parameters

The following table lists all of the available parameters in the Interactive Workforce properties file. The Interactive Workforce properties file is located in the following filepath:

..\eCyborg\InteractiveWorkforce\ServletExec\se-*environment*\ess.properties

Parameter	**Description**	**Default**	**Env. specific?**
navigationController.urlBase	URL base directory for an instance of the controller server.	/CyborgIW/	No
NavigationController.map			
BaseDirectory	Maps directory.	maps	No
NavigationController.default			
Page	Default page.	n/a	No
Navigation Controller.errorPage	URL of a default page to be served due to an error.	n/a	No
Log.filename	Specifies the name of the file.	InteractiveWorkforce.log	Yes
Selfservice.database.driver			
ClassName	Specifies the name of the JDBC driver used to connect Interactive Workforce DB.	sun.jdbc.odbc.JdbcOdbcDr iver	No
Selfservice.database.uri	Additional parameters used by the JDBC driver to connect Interactive Workforce DB.	jdbc:odbc:CybIW	Yes
UserName & UserPassword	User name & password for Interactive Workforce DB.	CybIWdba	No
InitialConnectionCount	Number of connections to Interactive Workforce DB.	10	Yes
ConnectionWaitTimeout	Time Interactive Workforce DB connection will remain inactive before shutdown.	10000	No
Selfservice.database.driver			
ClassName	Name of the JDBC driver used to connect to the Pay Info DB.	Same as Interactive Workforce database	No
Selfservice.database.uri	Parameters used by the JDBC driver to connect with Pay Info DB.	Same as Interactive Workforce database	Yes
UserName & UserPassword	User name & password of the Pay Information DB.	cybpaydba	No

Parameter	**Description**	**Default**	**Env. specific?**
InitialConnectionCount	Number of connections to the Pay Info DB.	10	Yes
ConnectionWaitTimeout	Amount of time Pay Info DB connection will remain inactive before shutdown.	10000	No
STAPI.orbPropertiesFilename	Name of the file containing the OrbixWeb configuration parameters.	OrbixWeb.properties	No
STAPI.userName & userPassword	User name and password used in establishingThe Solution Seriesconnection.	ESS1	No
STAPI.environment	Name of theThe Solution Seriesenvironment.	set at install	Yes

STAPI configuration file parameters

The following table lists all of the available parameters in the STAPI configuration file, listing whether they must be environment-specific, and if they need configuration:

Parameter	Description	Default	Env. specific?
MessageMap	Specifies text file with text descriptions of STAPI errors.	ExceptionMessage.txt	No
MessagePrefix	Specifies the STAPI version.	STAPIServerX.X	No
LogFilename	Specifies the name and filepath location of the STAPI log.	STAPIServer.log	Yes
Diagnostic Level	Specifies the level of detail in Orbix diagnostics.	0	Yes
ServerTimeout	Species the amount of time, in milliseconds, that the STAPI will allow an instance of STAPI Server to remain inactive before shutting it down.	NEVER_TIMEOUT	Yes
EnvironmentPath Name	Specifies the name and path of a Solution Series environment for which this particular instance of the STAPI has been configured.	Set at install	Yes
CAB.<parameters>	OS/390 systems only. Refer to CAB Configuration Parameters table following.		
CBSVDirectory CBSVAppName	All other systems. Refer to CBSV and CYBIO Configuration Parametersfor CAS/CAB tables following.		
CAB.<parameters>	All other systems. Refer to CBSV and CYBIO Configuration Parametersfor CAS/CAB tables following		
MinCbsvoConnections MaxCbsvoConnections CbsvoTimeout CbsvoEvictionInterval	Specify the CBSVO Connections. Refer to Connection Pools for more information.	1 10 600 (seconds) 60 (minutes)	Yes
MinCybioConnections MaxCybioConnections CybioTimeout CybioEvictionInterval	Specify the CYBIO Connections. Refer to Connection Pools for more information.	1 1 300 (seconds) 90 (minutes)	Yes

Parameter	Description	Default	Env. specific?
ThreadPoolSize	Specifies the number of threads between Interactive Workforce and STAPI. Refer to Connection Pools for more information.	11	Yes
View	Refer to Chapter 2.	Refer to Appendix B	Yes

CBSVO and CYBIO configuration parameters for CAB (OS/390)

In OS/390 systems, the STAPI uses the following parameters to connect with the Cyborg Application Broker (CAB):

Parameter	Description	Default	Environment specific?
CAB.Enabled	Enables CAB connection if set to 'TRUE'.	Set at install	No
CAB.ApplicationBrokerID		com::cyborg::Online::ApplicationBroker	No
CAB.Environment	Name of Interactive Workforce environment	CybESS	Yes
CAB.IORFileLocation		\eCyborg\IW\STAPI\Bin\GenFac.cyb390.ior	
CAB.STAppID	Application ID number of The Solution Series online application.	2	
CAB.File01AppID	Application ID number for the System Control Repository (FILE01) application.	3	

CBSVO and CYBIO configuration parameters for CAS (Windows)

In Windows systems, the STAPI communicates to the Cyborg Solution Series Application Server (CAS) and required the following parameters:

Parameter	**Description**	**Default**	**Env-specific?**
CBSVDirectory	Location of the CasRexec/CBSVO executable	CBSVDirectory=d:\eCyborg\IW\STAPI\Bin	Yes
CBSVAppName	Name of CasRexec/CBSVO executable	CBSVAppName=cbsvo.bat	Yes
FileOneDirectory	Location of the CasRexec/CYBIO executable	FileOneDirectory=d:\eCyborg\IW\STAPI\Bin	Yes
FileOneAppName	Name of the CasRexec/CYBIO executable	FileOneAppName=cybio.bat	Yes

CBSVO and CYBIO configuration parameters for CasRexec (UNIX and AS/400)

In UNIX and AS/400 systems, the STAPI uses CasRexec to communicate with the Cyborg Solution Series Application Server (CAS). CasRExec requires the following parameter settings:

Parameter	**Description**	**Default**	**Environment specific?**
CBSVDirectory	Location of the CasRExec/CBSVO executable	CBSVDirectory=d:\eCyborg\IW\CasRexec\Bin	Yes
CBSVAppName	Name of CasRExec/CBSVO executable	CBSVAppName=crxcbsvo.bat	Yes
FileOneDirectory	Location of the CasRExec/CYBIO executable	FileOneDirectory=d:\eCyborg\IW\CasRexec\Bin	Yes
FileOneAppName	Name of the CasRExec/CYBIO executable	FileOneAppName=crxcybio.bat	Yes

CasRexec parameters - crxcbsvo and crxcybio (UNIX and AS/400)

In Solaris, AIX, and AS/400 systems, the CasRexec uses crxcbsvo to talk with CBSVO and crxcybio to talk with CYBIO. Each can be configured using the corresponding properties file:

..\eCyborg\IW\STAPI-*environment*\CasRexecetc\crxcbsvo.properties
..\eCyborg\IW\STAPI-*environment*\CasRexec\etc\crxcybio.properties

For multiple environments, each environment will have its own appropriately named version of these files (eg. crxcbsvoTest, crxcybioTest). These files contain the following parameters:

Parameter	Description	Default
com.cyborg.casrexec.cas.hos t	Specifies the TCP host for CAS server. Can be a hostname or IP address.	<hostname>
com.cyborg.casrexec.port	Specifies TCP port for CAS server.	9888
com.cyborg.casrexec.app. environment	Specifies the environment in CAS configuration. 8 chars max.	??
com.cyborg.casrexec.app.id	Specifies the application ID of the application to execute: 2=The Solution Series online applicaiton (CBSVO) 3=System Control Repository (FILE01)	2
com.cyborg.casrexec.data. encryption	Enables encryption between the current machine and the host application.	on
com.cyborg.casrexec.data. newline.translation.incoming	Specifies if newline chars should be translated from CAS server to local representation. Similar to 'ascii' mode during a GET in FTP.	off
com.cyborg.casrexec.data. newline.translation.outgoing	Specifies if newline chars should be translated from local representation to CAS server. Similar to 'ascii' mode during a PUT in FTP.	off
com.cyborg.casrexec.data. newline.value.local	Specifies chars used for newline on local system. CR=Carriage Return LF=Line Feed CRLF=CR followed by LF	CRLF
com.cyborg.casrexec.data. newline.value.remote	Species chars used for newline on the CAS server. CR=Carriage Return LF=Line Feed CRLF=CR followed by LF	LF

Parameter	Description	Default
com.cyborg.casrexec.authentication.be-a-cyborg-user	Determines if 'Cyborg' user is used to execute CBSVO. on=use 'Cyborg' user, ignore following username/password params off=app executed using name/paswword specified in following params	on
com.cyborg.casrexec.authentication.username.source	Specifies whether username is stored in 'username.value' param or read from a file: value=username in com.cyborg.casrexec.authentication.username.value file=username in com.cyborg.casrexec.authentication.username.file	value
com.cyborg.casrexec.authentication.username.value	Specifies username used by CasRexec to access CBSVO.	username
com.cyborg.casrexec.authentication.username.file	Specifies file containing password. To read directly from the keyboard: CON=Windows NT /dev/tty=Unix.	--
com.cyborg.casrexec.authentication.password.source	Specifies whether password is stored in 'password.value' param or read from a file: value=password in com.cyborg.casrexec.authentication.password.value file=password in com.cyborg.casrexec.authentication.password.file	file
com.cyborg.casrexec.authentication.password.value	Specifies password. Not encrypted. Method not recommended	--
com.cyborg.casrexec.authentication.password.file	Password read from the first line of this file. To read directly from the keyboard: CON=Windows NT /dev/tty=Unix	CON
com.cyborg.casrexec.socket.half-closed	Specifies if half-closed s ockets used when closing network connection. on=half closed off=fully closed auto=half if possible, full if not (recommnded setting)	auto
com.cyborg.casrexec.socket.propagate-input-eof	Specifies if output side of network socket should be closed when standard input is closed by user: on=output closed when EOF received (recommended) off=output not closed when EOF received	on
com.cyborg.casrexec.socket.receive-buffer-size	Specifies the size in bytes of the socket receive buffer.	default (OS-defined)

Database configuration file parameters

There are two database configuration files—one each for the Interactive Workforce and Pay Information databases.

The following table lists all of the available parameters in the database configuration files, listing whether they must be environment-specific, and if they need configuration:

Pay Information DB configuration parameters (Windows)

Since the Web Application Server is always run on a Windows machine no matter which platform The Solution Series Application Server is on, the following parameters apply to all implementations:

Parameter	Description	Default	Environment specific?	Configuraable?
DBNAME	Name of the database.	CybIW	Yes	Yes
DBUSER	The admin user name of the database.	cybiwdba	Yes	Yes
DBPASS	The password assigned to the DBUSER.	cybiwdba	Yes	Yes
DBPATH	The file path where the DATA and LOG files will be created.	…:\eCyborg\Ess\ESSDatabase\CybESS\SqlData	Yes	Not directly
DBSIZE	The initial size of the database DATA file in Megabytes (MB).	200	Yes	Yes
DBMAX	The maximum size of the DATA file in MB.	20000	Yes	Yes
DBGROWTH	The size to increase the database DATA and LOG files in Kilobytes (KB).	10000	Yes	Yes
LOGSIZE	The initial size of the database LOG file in MB.	50	Yes	Yes
LOGMAX	The maximum size of the database LOG file in MB.	10000	Yes	Yes

Pay Information DB configuration parameters (Windows)

Pay Information database configuration file parameters in Windows:

Parameter	Description	Default	Environment specific?	Configurable?
DBNAME	Name of the database.	CybPayInfo	Yes	Yes
DBUSER	The admin user name of the database.	cybpaydba	Yes	Yes
DBPASS	The password assigned to the DBUSER.	cybpaydba	Yes	Yes
DBPATH	The file path where the DATA and LOG files will be created.	…:\eCyborg\Ess\PayInfoDatabase\CybPay\SQLData	Yes	Not directly
DBSIZE	The initial size of the database DATA file in Megabytes (MB).	200	Yes	Yes
DBMAX	The maximum size of the DATA file in MB.	20000	Yes	Yes
DBGROWTH	The size to increase the database DATA and LOG files in Kilobytes (KB).	10000	Yes	Yes
LOGSIZE	The initial size of the database LOG file in MB.	50	Yes	Yes
LOGMAX	The maximum size of the database LOG file in MB.	10000	Yes	Yes

Pay Information DB configuration parameters (UNIX)

Database configuration file parameters in UNIX:

Parameter	Description	Environment specific?	Configurable?
DATABASE_TBLSPACE_NAME	Name of the Pay Information database tablespace.	Yes	Yes
INDEX_USER_NAME	Name of the Pay Information database index tablespace.	Yes	Yes
DATAFILE	Path to the database file.	Yes	Yes
INDEXFILE	Path to the index file.	Yes	Yes
DATAFILESIZE	Size of the database file.	Yes	Yes
INDEXFILESIZE	Size of the database index file.	Yes	Yes

Pay Information DB configuration parameters (OS/390)

Database configuration file parameters in OS/390:

Parameter	Description	Environment specific?	Configuration?
VOLUME	A Volume serial number of a storage volume. It can have a maximum of six characters and is specified as an identifier or a string constant.	?	?
VCAT	Catalog Name. Identifies the integrated catalog facility for the catalog group.	?	?
STOGROUP	Storage Group name.	?	?
DBNAME	Pay Information database name.	?	?
TABLESPACE	Pay Information database tablespace name.	?	?
BUFFERPOOL	Identifies the buffer pool to be used for the table space.	?	?
PRIQTY	Specifies the minimum primary space allocation for a DB2-managed data set in kilobytes.	?	?
SECQTY	Specifies the minimum secondary space allocation for a DB2-managed data set in kilobytes.	?	?
SQLID	The current SQL ID	?	?
QUALIFIER	The High Leve Qualifier (HLQ) for the environment	Yes	--

APPENDIX E

Logging, Error Messages, and Troubleshooting

In This Appendix

Logging, Error Messages, and Troubleshooting

Server type errors occur on the back end. The Interactive Workforce back end combines new functionality with existing The Solution Series functionality which is accessed via the STAPI.

A server side error may occur when some condition in the business logic, either within The Solution Series or the new Interactive Workforce logic occurs, or when a system level problem exists. This appendix categorizes the server side errors based on where in the back end system the error originated:

- Solution Series errors. These errors originate in The Solution Series, and appear through Interactive Workforce in the web browser.
- Interactive Workforce errors. These errors originate in Interactive Workforce, and appear in the Interactive Workforce log. Interactive Workforce errors are broken down into the following:
  - STAPI
  - General Interactive Workforce Errors
  - ControllerServlet Errors
  - Option List Extracts
- STAPI errors. These errors originate in the STAPI, and appear in the STAPI log.

These errors can be used to troubleshoot problems that occur in the operation of Interactive Workforce.

The Solution Series Errors

When inserts and updates are made through Interactive Workforce, The Solution Series may detect a problem and return an error code. All errors originating in The Solution Series will be displayed on a separate page in the Interactive Workforce browser.

The Solution Series error messages provide information to Technical Administrators and may not make sense to employee users. Thus, most The Solution Series error messages are translated for the Interactive Workforce employee user. Only error messages that are likely to occur in Interactive Workforce have been translated. In rare cases The Solution Series errors may occur that have not been translated. These errors will be displayed to the Interactive Workforce user as is.

There are three categories of The Solution Series error messages:

Error Code?	Message Translation?	Type	Display
None	No	Internal The Solution Series errors	Solution Series message as is
Yes	No	Application error	Error code + The Solution Series message as is
Yes	Yes	Application error	Error code + translated message

The Solution Series Translated Errors

The Solution Series Form	The Solution Series Called Program	Message Number	The Solution Series Message	Notes and Recommended Translation	Retry
A8-SCR		None			
AP-ESS		None			
ECOLIST		None			
EF-SCR		PP128R	Title not allowed with SEX-CODE	There is a conflict between your gender and the title you selected.	Yes
EM-SCR		None			
ESS Pay Info		None			
FF-SCR		None			
H9-SCR		None			
TM-SCR		None			

The Solution Series Form	The Solution Series Called Program	Message Number	The Solution Series Message	Notes and Recommended Translation	Retry
TP-ESS		None			
02-SCR		None			
03-SCR		None			
09-SCR		None			
10-SCR		HR023R	Sex code is in conflict with Relationship Code.	There is a conflict between the gender and relationship. For example, if you chose son as the relationship, please be sure you checked male as the gender.	Yes
15-SCR		None			
16-SCR		None			
40-SCR		None			
55FESS		HR051R	Cannot insert new segment; employee record is full.	A system error has occurred. Please contact your System Administrator to relate the following message: Employee record is full.	
55FESS		BA064R	Contribution amount must be present.	Please enter a contribution amount.	Yes
55FESS		BA552R	Plan status must be entered.	A system error has occurred. Please contact your Benefits Administrator to relate the following message: Plan status must be entered.	
55FESS		BA577R	Future Dated Enrollment on file.	A system error has occurred. Please contact your Benefits Department and relate the following message: Future-dated enrollment on file.	
55FESS		BA578R	FCCSCR not on file for plan and date.	A system error has occurred. Please contact your Benefits Department and relate the following message: FCCSCR not on file for plan and date.	

The Solution Series Form	The Solution Series Called Program	Message Number	The Solution Series Message	Notes and Recommended Translation	Retry
55FESS		BA615R	Changes cannot be processed for the date entered.	A system error has occurred. Please contact your Benefits Department and relate the following message: Changes cannot be processed for the date entered.	
55FESS		SC531R	Company Record (AREA 4) Needs to be expanded.	A system error has occurred. Please contact your Benefits Department and relate the following message: Company record (Area 4) needs to be expanded.	
55FESS		SC532R	Employee Record (AREA 2) Needs to be expanded.	A system error has occurred. Please contact your Benefits Department and relate the following message: Company record (Area 2) needs to be expanded.	
55FESS		SC533	Insert of segment failed; area is full.	A system error has occurred. Please contact your Systems Administrator and relate the following message: Insert of segment failed; area is full.	
57-SCR		None			
58-SCR		HR023R	Sex code is in conflict with Relationship Code.	There is a conflict between the gender and relationship. For example, if you chose son as the relationship, please be sure you checked male as the gender.	Yes
59BSCR		BA131R	Total Percent Allocated does not equal 100%.	The percentages must total 100%.	Yes
	FCPSCR	SC533R	Insert of segment failed; area is full.	A system error has occurred. Please contact your System Administrator and relate the following message: Insert of segment failed; area is full.	

The Solution Series Form	The Solution Series Called Program	Message Number	The Solution Series Message	Notes and Recommended Translation	Retry
	55FCRD	SC533R	Insert of segment failed; area is full.	A system error has occurred. Please contact your System Administrator and relate the following message: Insert of segment failed; area is full.	
	55FDEL	SC533R	Insert of segment failed; area is full.	A system error has occurred. Please contact your System Administrator and relate the following message: Insert of segment failed; area is full.	
	55FEDT	BA576R	Employee must have Total Credits segment.	A system error has occurred. Please contact your System Administrator and relate the following message: Insert of segment failed; area is full.	
	UPDTPE	SC01BR	FILE01 read unique error; record not found. FILE01 read unique error; file not open.	A system error has occurred. Please contact your System Administrator and relate the following error code: SC01BR.	
	UPDTPE	SC01TR	FILE01 rewrite error; record not found. FILE01 Rewrite bypassed, No RDBMS View Name. FILE01 Rewrite bypassed, RDBMS update failed. FILE01 Rewrite error; file not open.	A system error has occurred. Please contact your Systems Administrator and relate the following error code: SC01TR.	

The Solution Series Form	The Solution Series Called Program	Message Number	The Solution Series Message	Notes and Recommended Translation	Retry
	UPDTPE	SC01WR	FILE01 write error; duplicate record. FILE01 write error; file full. FILE01 Write bypassed, No RDBMS View Name. FILE01 Write bypassed, RDBMS insert failed.	A system error has occurred. Please contact your Systems Administrator and relate the following error code: SC01WR.	
	55-SHO	HR0151R	Cannot insert new segment; employee record is full.	A system error has occurred. Please contact your System Administrator and relate the following message: Insert of segment failed; area is full.	

Interactive Workforce Log Error Messages

The Interactive Workforce log file captures errors that occur on the web application server within the Interactive Workforce application code. When these errors occur, they are written to the Interactive Workforce log.

☞ *Refer to the Technical Administration of The Solution Series documentation for full details on logging errors in other components of the system.*

Interactive Workforce log

The Interactive Workforce log reports on the connections being made, the .xml maps being used, the programs being loaded, and the server-side error messages listed later in this section. The log can be opened for viewing using a text editor, and can be found in the environment-specific ServletExec directory in your Interactive Workforce installation, using the following file path format:

…\eCyborg\Ess\ServletExec\se-*environment name*\ess.log

Shown here is an example of the Interactive Workforce log:

```
Mar 16, 2001 3:50:35 PM  LOG STARTED.
Mar 16, 2001 3:50:35 PM  com.cyborg.selfservice.SelfServiceStartupServlet@d3a8318f
Mar 16, 2001 3:50:35 PM  com.unify.ewave.servletexec.JSServletConfig@dcac318f
Mar 16, 2001 3:50:35 PM  Thread[main,5,main]
Mar 16, 2001 3:50:35 PM  Client-side error messages loaded.
Mar 16, 2001 3:50:35 PM  Server-side error messages loaded.
Mar 16, 2001 3:50:36 PM  Database pool created for: jdbc:odbc:CybESS. Connections:
10
Mar 16, 2001 3:50:36 PM  Database pool created for: jdbc:odbc:CybPayInfo.
Connections: 10
Mar 16, 2001 3:50:36 PM  SelfServiceBackend: resolving Naming Service
Mar 16, 2001 3:50:36 PM  SelfServiceBackend: Resolving name:
STAPIConnectionManagerId
Mar 16, 2001 3:50:36 PM  SelfServiceBackend: Resolving ConnectionManager
Mar 16, 2001 3:50:38 PM  SelfServiceBackend: ConnectionManager found
Mar 16, 2001 3:50:38 PM  SelfServiceBackend: Performing login
Mar 16, 2001 3:50:38 PM  SelfServiceBackend: login complete
Mar 16, 2001 3:50:38 PM  Cyborg Self Service Application v2.1.0 ready.
Mar 16, 2001 3:50:38 PM  ControllerServlet v2.1.0: preparing namespace for
'ess.properties'
Mar 16, 2001 3:50:38 PM  applicationUrlPrefix=/CyborgESS/
Mar 16, 2001 3:50:38 PM  loading maps\AccessTool.process.xml
Mar 16, 2001 3:50:39 PM  applicationUrlPrefix=/CyborgESS/
Mar 16, 2001 3:50:39 PM  loading maps\AddAdministrator.process.xml
Mar 16, 2001 3:50:39 PM  applicationUrlPrefix=/CyborgESS/
Mar 16, 2001 3:50:39 PM  loading maps\AdminPasswordPolicies.process.xml
Mar 16, 2001 3:50:39 PM  applicationUrlPrefix=/CyborgESS/
```

…

STAPI errors

All access to The Solution Series is accomplished via STAPI, the The Solution Series Application Program Interface. STAPI and The Solution Series must be located on the same machine. However, they may be located on a separate machine from Interactive Workforce. Many STAPI generated errors are due to system configuration problems. For instance, Interactive Workforce gains access to STAPI using CORBA software. Both STAPI and Interactive Workforce must be properly configured in order to communicate with each other.

Error Code	Error Message	Why the error occurred	Retry ?
STAPI001	A system error has occurred. Please contact your System Administrator to relate the following message: The system is temporarily unavailable. Please logout and try again later.	A connection to STAPI was not possible, probably because it has been suspended for a pay run or other maintenance.	No
STAPI 002	A system error has occurred. Please contact your System Administrator to relate the following message: InputRecordSet session variable not loaded for operation: operation.	This is probably a programmer error when attempting an STAPI operation. The system administrator should consult both the Interactive Workforce and STAPI log files.	No
STAPI 003	A system error has occurred. Please contact your System Administrator to relate the following message: Not a legal operation: operation.	A programmer error when attempting an STAPI operation. The system administrator should consult both the Interactive Workforce and STAPI log files.	No
STAPI 004	A system error has occurred. Please contact your System Administrator to relate the following message: Operation or ConstraintSet variable not loaded for operation: operation.	A programmer error when attempting an STAPI operation. The system administrator should consult both the Interactive Workforce and STAPI log files.	No
STAPI 005	A system error has occurred. Please contact your System Administrator to relate the following message: CORBA Exception XXX.	CORBA Exceptions are low level communication problems with STAPI. The system administrator should consult both the Interactive Workforce and STAPI log files.	No
STAPI 006	A system error has occurred. Please contact your System Administrator to relate the following message: STAPI Exception XXX.	The system administrator should consult both the STAPI log files.	No
STAPI 007	The system is temporarily unavailable. Please try again later.	STAPI suspended because of pay run.	No

Error Code	Error Message	Why the error occurred	Retry ?
STAPI008	A timeout occurred while waiting for a STAPI connection. Please try again later. Contact your System Administrator if the problem persists.	A connection attempt timed out.	No.

General Interactive Workforce Errors

These errors occur because of unsuccessful interaction between Interactive Workforce and the Interactive Workforce database, the server, hardware, or software components. Examples are errors that are the result of server connectivity. Server-side general Interactive Workforce messages will be displayed on a separate page. They will be in the format of an error code and an error message.

Error Code	Error Message	Why the error occurred	Retry?
S001	Unable to parse this date: %p.		No
S002	The system is unable to log you on at this time. Please contact your System Administrator or try again later.		No
S003	The system is currently shut down for maintenance. Please try later.		No
S004	The following option list cannot be found in the database: %p, Country Code: %p.		No
S005	A timeout occurred while waiting for a database connection. Please try later. Contact your System Administrator if the problem persists.	This message will be issued if we have waited for more than the timeout period specified in the ess.properties file without getting a database connection. The administrator can either increase the timeout value or increase the size of the connection pool.	Yes
S006	The Organization table is not populated.	At login, the organization table is checked to ensure that it is being populated. If not, this message is reported to the log file and the user is denied access.	
S007	Not currently in use.		
S008	A system error has occurred. Please contact your System Administrator to relate the following message: %p.	The Solution Series errors without 6 digit error code.	No
S009	Unable to load key generation fields from database.	HR Admin – Key Generation.	Yes

Error Code	Error Message	Why the error occurred	Retry?
S010	Unable to establish connection with database.	HR Admin – Key Generation.	Yes
S011	Delete Relationship_Generate_Key failed.	HR Admin – Key Generation.	Yes
S012	Insert Relationship_Generate_Key for benef, spouse failed.	HR Admin – Key Generation.	Yes
S013	Insert Relationship_Generate_Key for benef, other failed.	HR Admin – Key Generation.	Yes
S014	Insert Relationship_Generate_Key for depen, spouse failed.	HR Admin – Key Generation.	Yes
S015	Insert Relationship_Generate_Key for depen, other failed.	HR Admin – Key Generation.	Yes
S016	Unable to save key generation fields into database.	HR Admin – Key Generation (can actually cover above 5).	Yes
S017	Delete key generation failed.	HR Admin – Key Generation.	Yes
S018	Could not find company or relationship in database.	Key Generation for Beneficiary or Dependents.	Yes
S019	Could not load auto key generation from database.	Key Generation for Beneficiary or Dependents.	Yes
S020	The system is experiencing difficulty in connecting to the database. Please contact your system administrator or try again later.	System Admin.	Yes
S021	Employee not found.	When trying to reset password using System Admin.	Yes
S022	Database error updating password. Please try again later.	Saving Change Password Flag.	Yes
S023	Database error updating name. Please try again later.	Updating name in user database.	Yes
S024	Database error updating marital status flag. Please try again later.		Yes
S025	There is an error with the password engine. Please contact your database administrator.	Encryption did not work.	Yes
S026	You may have entered an incorrect User ID or an incorrect password. Remember these fields cannot be blank. Please try again.	A user has failed to enter a User ID and/or password, OR A user has entered an incorrect User ID and/or password.	Yes

Error Code	Error Message	Why the error occurred	Retry?
S027	A claims submission deadline for Flexible Spending Accounts cannot be found. Please contact your Benefits Administrator.	The user has selected 'Flexible Spending Account Balances' from the Interactive Workforce Home page, but a claim submission deadline for Flexible Spending Accounts was not established in Benefits Administration.	Yes
S028	Database not available. Please try again later.	Miscellaneous database error.	Yes
S029	A database access error has occurred. Please contact your System Administrator to relate the following message: %p.		No
S030	The new password must be at least 4 characters and not greater than 20.	This error occurs when the new password is not at least 4 character long or exceeds 20 characters.	Yes
S031	The existing password is incorrect. Please enter a correct password.	This error occurs when the existing password is incorrect.	Yes
S032	The new passwords entered do not match. Please enter a new password and re-enter it to confirm.	This error occurs when the new password and the re-type password are not the same.	Yes
S033	The password can contain only letters or numbers.	When changing password. Password cannot contain symbols or spaces.	Yes
S034	The new password cannot be the same as your initial password. Please choose a another password.	This error occurs when trying to change a password and the new password is the same as the initial password.	Yes
S035	The new password cannot be the same as your old password. Please choose another password.	This error occurs when trying to change a password and the new password is the same as the old password.	Yes
S036	The password you've entered is too easily deduced by others. To protect your security, please choose another.	Password is the same as another user's current password (user is not supposed to know this), OR password is the same as another user's initial password.	Yes
S037	You are not currently eligible for any group benefit plans.	This message occurs when the AP-ESS fails to return benefit plans, no matter the reason the AP-ESS was invoked.	
S038	You are not enrolled in any group benefit plans for next year.	This message occurs when the user tries to view enrollments for next year, but has not finished open enrollment.	
S039	Not currently used.		
S040	Not currently used.		
S041	Not currently used.		

Error Code	Error Message	Why the error occurred	Retry?
S042	Not currently used.		
S043	The Interactive Workforce account has expired. Please contact your System Administrator for assistance.	This error will occur when the user logs on, but the account has expired. [Note this message may need revision once an approach to the GUI is finalized.]	Yes
S044	Not currently used.		
S045	Not currently used.		
S046	Not currently used.		
S047	Not currently used.		
S048	Not currently in use.		
S049	Not currently in use.		
S050	Please contact Human Resources to make a change to the Social Security Number or Social Insurance Number.	This error results when a user tries to edit the Social Security Number/Social Insurance Number of a family member or beneficiary.	Yes
S051	Benefit Plan Option code '%p' is missing from the database. Please contact your Benefits Administrator.		No
S052	Plan '%p' is not associated with a Subgroup. Please contact your Benefits Administrator.		No
S053	Cannot find flex master for organization '%p' in the database. Please contact your Benefits Administrator.		No
S054	Unable to load flex master for organization '%p' from the database. Please contact your Benefits Administrator and report the following database error: %p.		No
S055	Unable to load benefit information from the database. The following message was reported by the database: %p. Please contact your System Administrator.		No
S056	Unable to load the beneficiary assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No

Error Code	Error Message	Why the error occurred	Retry?
S057	Unable to load the dependent assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S058	Unable to save benefit enrollments. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S059	Unable to delete old beneficiary assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S060	Unable to update beneficiary assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S061	Unable to inset new beneficiary assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S062	Unable to delete old dependent assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S063	Unable to update dependent assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S064	Unable to inset new dependent assignment information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S065	Unable to load benefits information. STAPI returned a status of '%p'. Please contact your System Administrator.		No
S066	The database contains no plan tree information for company %p's flex master. Please contact your Benefits Administrator.		No

Error Code	Error Message	Why the error occurred	Retry?
S067	Administration data is not set up properly. Please contact your Benefits Administrator.	If the user selects 'Benefits Eligibility' or 'Enroll in Benefits', the system must confirm that the Flex master has been set up properly before allowing them to continue. If the Flex master has not been set up properly, this error occurs.	No
S068	There are no Benefit Plan Options in the database. Please contact your Benefits Administrator.		No
S069	You are not currently enrolled in any group benefit plans.	This message occurs when the AP-ESS fails to return benefit plan enrollments, no matter the reason the AP-ESS was invoked.	No
S070	Administrator already exists.	This error message is obtained when you try to create an admin user with the same user name as one that has already been created	No
S071	The excess flex credits message has not been initialized. Please contact your Benefits Administrator.		No
S072	Unable to load the Benefit Plan Options from the database. Please contact your Benefits Administrator and report the following database error: %p.		No
S073	When trying to record the successful completion of benefits enrollment in the database, the following error occurred: %p. Please contact your System Administrator.		No
S074	Beneficiary '%p' was referenced but is not present in The Solution Series. Please contact your System Administrator.		
S075	Dependent '%p' was referenced but is not present in The Solution Series. Please contact your System Administrator.		
S076	The administrative duties necessary to perform this task have not been completed. Please contact your System Administrator.	A task in Interactive Workforce Administration, HR Administration, Benefits Administration, or Payroll Administration has not been completed.	

Error Code	Error Message	Why the error occurred	Retry?
S077	Benefit plans not set up correctly. Please contact your Benefits Administrator to relate the following message: Non-waivable plan %p is combined with plan(s) %p in the following subgroup: %p.	A benefit subgroup that this employee needs to enroll in contains a combination of plans that this employee is eligible for that is not feasible. The combination is not feasible for the following reason: A plan that cannot be waived is in the same subgroup as one or more other plans. The error message will list only the plans that cause a conflict for this particular employee.	No
S078	Unable to retrieve your benefits data. Please contact your benefits administrator to enroll in benefits.	This message occurs when a user is trying to enroll in benefits on the New User home page, and the user is not eligible for benefits until the next benefits year. The current version of Interactive Workforce cannot process this type of enrollment, so the user has to enroll using an alternate method.	No
S079	The version data for this environment is invalid. Please contact your System Administrator.		No
S080	he module definition file does not contain the {0} property. Please contact your System Administrator.		No
S081	The time away request for employee {0} in organization {1} that starts on {2} with a key separator of {3} cannot be located. Please contact your System Administrator.		No
S083	The site map node whose id is {0} cannot be found in the site map. Please contact your System Administrator.		No
S084	The feature named "{0}" found in the permissions table is not recognized. Please contact your System Administrator.		No
S085	The group named "{0}" was not found the Cyborg_Group table. Please contact your System Administrator.		No
S086	The following database error occurred "{0}". Please contact your System Administrator.		No

Error Code	Error Message	Why the error occurred	Retry?
S087	A request was received which required the process named "{0}" to be visited, but that process does not exist. If you were attempting to access a page using a bookmark, please navigate to that page using the Navigator and bookmark it again. If this error occurred during normal navigation, please contact your System Administrator.		No
S088	A request was received which required a node named "{0}" in the process "{1}" to be visited, but that node does not exist. If you were attempting to access a page using a bookmark, please navigate to that page using the Navigator and bookmark it again. If this error occurred during normal navigation, please contact your System Administrator.		No
S089	Cannot find node "{0}" in current site map. Node may no longer be accessible. Please contact your System Administrator.		No
S090	Client request is missing required parameter "{0}". Please contact your System Administrator.		No
S091	The region indicated by "{0}" cannot be found. Please contact your System Administrator.		No
S098	A new instance of the "{0}" view could not be created because the key separators have been exhausted for {1}. Please contact your System Administrator.		No
S099	The field {0} is not defined for the view "{1}". Please contact your System Administrator.		No
S100	The %p field of the '%p' view contained the value '%p' which could not be parsed. Please contact your System Administrator.		No

Error Code	Error Message	Why the error occurred	Retry?
S200	Unable to load the Benefit Plans from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S201	Unable to load the Benefit Plan Subgroups from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S202	Unable to load the Benefit Plan Groups from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S203	Unable to load the Flex Masters from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S204	Unable to load the Benefit Plan Options from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S205	Unable to save the Benefit Plans to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S206	Unable to save the Benefit Plan Subgroups to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S207	Unable to save the Benefit Plan Groups to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S208	Unable to save the Flex Masters to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No

Error Code	Error Message	Why the error occurred	Retry?
S209	Unable to save the Benefit Plan Options to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S210	Unable to remove the Benefit Plans from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S211	Unable to remove the Benefit Plan Subgroups from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S212	Unable to remove the Benefit Plan Groups from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S213	Unable to remove the Flex Masters from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S214	Unable to extract data from the The Solution Series View Flex Component. Please contact your System Administrator and report the following error: %p.		No
S215	Unable to load the Flex Master Organizations from the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No
S216	Unable to save the Flex Master Organizations to the database. Please contact your System Administrator and report the following database error: %p.	This message occurs when a query to the database cannot be executed.	No

Error Code	Error Message	Why the error occurred	Retry?
S217	Unable to load data record read from the The Solution Series View Flex Component. Please contact your System Administrator and report the following error: %p.	The Flex Component View could not execute. Reasons why include: a) the view does not exist in the STAPI configuration file, b) using an environment that does not exist, c) communications issue with the network. Resolutions: a) verify the STAPI.CFG file, b) check properties files for the correct environmental network in the OrbixWeb.properties file, c) verify the network connectivity.	No
S218	Unable to translate Flex Master Date from The Solution Series View Component. Check the dates on the TP-SCR. The following error was returned: %p.	This error occurs when the Flex Master Date that comes back from The Solution Series (Fex Master Group Plan Components TP-SCR) needs to be translated into Date Format.	No
S219	No information returned from The Solution Series for Flex Component View. Check the The Solution Series Flex Master Setup. The following error was returned: %p.	This error occurs if there is no Flex Master set up on the Flex Master Group Plan Components (TP-SCR) screen in The Solution Series. Resolution: Verify that there is a Flex Master set up, and that the The Solution Series environment that they are set up in is set in the properties file.	No
S220	Unable to extract data from the The Solution Series View Plan General Information. Please contact your System Administrator and report the following error: %p.	The Plan General Information View was not able to execute. Examples: a) the view does not exist in the STAPI configuration file, b) using an environment that does not exist, c) communication issue with the network. Resolution: a) verify the STAPI.CFG file, b) check properties files for the correct environmental network, c) verify the network connectivity.	No
S221	No information returned from The Solution Series for Plan General Information View. Check the The Solution Series Plan Setup. The following error was returned: %p	This error occurs if there are no benefit plans set up on the Coverage and Contribution Factor (TM-SCR) screen in The Solution Series. Resolution: Verify that there are Flex Masters set up, and that the The Solution Series environment that they are set up in is set in the properties file.	No

Error Code	Error Message	Why the error occurred	Retry?
S221	You need to set up flex master(s) in The Solution Series before you can perform the functions on this page. Without flex masters in The Solution Series you will not be able to perform the necessary administrative duties for the Interactive Workforce benefits functionality.	This error occurs when the user accesses the "Verify Organizations and Flex Master Plans" page and there are no Flex Master Plans for both current and next year set up in The Solution Series.	No
S222	You need to set up flex master(s) in /ST before you can perform the functions on this page. Without flex masters in /ST you will not be able to perform the necessary administrative duties for the ESS benefits functionality.		No
S223	LicenseKey is missing from the startup configuration.		No
S224	License Key value not recognized. Please contact Cyborg Systems, Inc. for further instructions.		No
S225	The License Manager is out of sync. with the feature definitions. Please contact Cyborg Systems, Inc. for further instructions.		No
S226	Your session is out of sync with the {0}. Please contact you system administrator for further instructions.		No

ControllerServlet Errors

The ControllerServlet is a software module in the Interactive Workforce application that directs the flow through the application. Errors in the ControllerServlet may occur if the installation has been corrupted or if the user has attempted an illegal flow or walked away from an active session.

Error Code	Error Message	Why the error occurred	Retry?
SCS001	ControllerServlet: The parameter [configuration=<Controller Servlet configuration filename>] is not specified.	The configuration parameter is not specified. For example: configuration=ess.properties. This parameter should be specified when registering the ControllerServlet.	No
SCS002	ControllerServlet: configuration properties file error.	Most likely the configuration properties file cannot be found, hence it cannot be loaded properly.	No
SCS003	This session has become invalid, most likely due to timeout. Please open a new browser and log on again.	There is no activity in the browser for a long period of time and hence the session timed out.	No
SCS004	ControllerServlet: Cannot load process map for: %p.	The process map for this process cannot be found.	No
SCS005	ControllerServlet: You cannot go back to a previous page.	A user has used the browser's back button and attempted to navigate to the point where the ControllerServlet has lost track.	No
SCS006	ControllerServlet: Error forwarding to URL: %p.	Some kind of programming exception has happened when the ControllerServlet tries to forward the HTTP request to a JSP.	No
SCS007	ControllerServlet: Error loading application maps.	There is a programming error in one of the process maps.	No
SCS008	ControllerServlet: Process not known: %p.	This process does not have a process map defined for it.	No
SC009	While parsing {0}, the following error occurred: {1} The error occurred on line {2}, column {3}.		No
SC010	In file {0}, the following error occured: {1} The error occured on line {2}, column {3}.		No

Option List Extract Errors

Error Code	Error Message	Why the error occurred	Retry?
SOL001	Organization or country lookup failed.		No
SOL002	Option list extract configuration file not found.		No
SOL003	Option list unsupported.		No
SOL004	Insert into option list tables failed.		No
SOL005	Unable to insert option_list into database.		No
SOL006	Delete option list tables failed.		No
SOL007	Unable to clear option list.		Yes

STAPI Log Error Messages

STAPI errors occur in the back end of the system, between the STAPI and The Solution Series. When these errors occur, they are written to the STAPI log.

STAPI log

The STAPI log details what the STAPI has been executing, including the exception messages listed later in this section. The STAPI log can be viewed using a text editor.

When opened, the STAPI log will appear as shown here:

```
11:42:26:148000 STAPIServer2.0:11:42:26 June 29, 2000: ST API Server 2.1.0.0
Launched...
11:42:26:408000 STAPIServer2.0:Multi-threaded CORBA request support enabled.
11:42:26:408000 STAPIServer2.0:Creating 5 threads to service incomming requests
11:42:26:408000 STAPIServer2.0:New request processing thread created(tid=239).
11:42:26:408000 STAPIServer2.0:Waiting for CORBA request(tid=239).
11:42:26:418000 STAPIServer2.0:New request processing thread created(tid=240).
11:42:26:418000 STAPIServer2.0:Waiting for CORBA request(tid=240).
11:42:43:573000 STAPIServer2.0:STAPIConnectionManagerImpl default constructor
invoked
11:42:43:743000 STAPIServer2.0:ConnectionPool<class CybioConnection> constructor
invoked.
11:42:43:743000 STAPIServer2.0:Initializing connection pool: minimum connections:
1, maximum connections: 2
11:42:43:743000 STAPIServer2.0:Creating new connection.(tid=123)
11:42:43:743000 STAPIServer2.0:BridgeController default constructor fired
11:42:43:743000 STAPIServer2.0:Connecting to application :
C:\eCyborg\Ess\STAPI\Bin/cybio.bat ...
11:42:43:743000 STAPIServer2.0:    Checking for existance of application ...
11:42:43:753000 STAPIServer2.0:Creating pipes ...
```

In an Windows-based, the STAPI log can be viewed on the The Solution Series Application Server by making the following selections from the NT desktop:

Start ► Programs ► Interactive Workforce ► Log Files

> **Important!** The STAPI log grows with every use of Interactive Workforce. To conserve disk space and optimize operations, you should periodically delete the STAPI log. The STAPI will start a new one after the old has been deleted.

Verbosity level

The amount of data shown by the log can be reconfigured by using the Verbosity command line argument, which is configured in the STAPIServer file. Before reconfiguring the Verbosity level, you need to shut down the system. Once changed, you will need to restart Interactive Workforce for the change to take effect.

In an NT-based, the STAPIServer file can be found on the The Solution Series Application Server in the following file path:

…\eCyborg\Ess\Stapi\Bin.bat

Once opened, you would edit the verbosity command line by changing the number after the -v command, as shown in the following example:

```
@echo off
Title STAPIServer
:: run the client
setlocal set PATH=%CYBORG_HOME%\Lib;%PATH%
cd %CYBORG_HOME%\Bin %CYBORG_HOME%\Bin\STAPIServer.exe -v 5 -c
%CYBORG_HOME%\config\Stapi.cfg
:: finished
endlocal
goto end
:: done
:end
```

Valid values for the verbosity level are listed in the following table:

Verbosity Level	Description
0, 1	Logs start/end of dictionary load
2	Logs the CORBA processes invoked, which includes connecting to and releasing the Bridge Controller
3	Logs the list of views being stored in the dictionary
4	Logs the forms copied into memory to support the views
5	Logs all field being copied into memory to support all forms

STAPI exception messages

Error Code	Error Message
0	Unrecognized Error Message Key
1	Uncategorized Error
2	Not Implemented
3	Assertion Violation
4	Invariant Violation
5	Precondition Violation
6	Postcondition Violation
7	Class Invariant Violation
8	Runtime Error
9	System Error
10	Database Error
12	No transaction error
13	Transaction rolled back error
11	Multiple Records Encountered in the Database when only one Record Expected
40	File Error
41	No Such File System Object

Error Code	Error Message
50	Hardware Exception
51	Network Error
52	Defect
53	Domain Error
54	Invalid Value
55	Length Error
56	Out of Memory Error
57	Out of Range Error
58	No Active Object
59	An Uninitialized Object was Detected
60	An Option was Specified More than Once
61	An Unknown Option was Specified
62	Poorly Formatted Command Line
63	Options that take an argument must be last in Option Group
Error Code	Error Message
64	A Mandatory Configuration Parameter Was Not Found
65	A Configuration Parameter Contained an Illegal Value
66	The File is not a Valid Cyborg Configuration File
67	Environment Variable CYBORG_HOME Is Not Defined
68	The Directory that Environment Variable CYBORG_HOME Contains Does Not Exist
69	The Directory CYBORG_HOME/config Does Not Exist
70	The Default Cyborg Configuration File Does Not Exist
71	A Necessary Section in a Configuration File Is Missing
72	The Exception Messages Mapping File Could Not Be Found
73	An Option That Was Specified Was Poorly Formatted
74	An Argument Was Missing From An Option That Has A Required Argument
75	The Directory CYBORG_HOME/log Does Not Exist
76	Invalid Login
77	Invalid Date Range
1024	Invalid Session Object
1025	Illegal Access
1026	Invalid Application
1027	The Session Has Timed Out
1028	The Maximum Number of Sessions has been Exceeded
2048	The Earning must already be assigned to a BusinessUnit

Error Code	**Error Message**
2049	The NonStatutoryDeduction must already be assigned to a BusinessUnit
2050	The Supplied Business Unit Had Missing Required Field: PayContext
3072	Missing required constraint from the constraint set (typically View or Codeset)
3073	Invalid constraint set (probably has both a View and Codeset constraint)
3074	Missing at least one key field in record
3075	The given Record not in sync with view or viewParent (missing fieldname or extra fieldname)
3080	A Mandatory STAPI Configuration Parameter Was Not Found (view or locale)
Error Code	Error Message
3081	Error during loading of ST Dictionary.
3090	ST View not Found (either not in config file or not a view name)
3091	ST Layer not Fount (either typo, not 7 characters, first 6 not a viewParent, last digit not number)
3092	ST ViewParent not Found (either not in config file or not a viewParent name)
3093	ST FieldMetaData not Found (either typo, or given FieldName not in config file)
3100	The S Record is not valid
3101	The F Record is not valid
3102	The ViewName was duplicated
3103	The ParentName is not in FileOne
3104	The FieldName is not in FileOne
3110	Error during read of FileOne
3111	Launch of FileOne application failed
3112	FileOne not open
3113	FileOne not connected
3114	FileOne key parameter too large
3115	FileOne numRecord parameter too large
3116	FileOne data parameter too large
3120	Query Error
3121	Update Error
3122	Remove Error
3123	Insert Error

Error Code	**Error Message**
3124	Describe Error
3130	Coordinator not prepared
3140	Pipe Error
3150	CBSVBridge Error
3160	Invalid Alternate Language Indicator
3161	Invalid Screen Size
3162	Screen contained an undefined unprintable character
3163	Screen has multiple start of screen characters before the end of screen character
3164	Screen has no start of screen character
Error Code	Error Message
3165	Screen has no end of screen character
3200	Error detected in STAPI configuration file

APPENDIX F

Practice and Review Answers

In This Appendix

About this appendix

This appendix provides answers for the Review of Questions Answered that are included at the end of each instructional chapter.

Chapter 3

Review of Questions Answered

1. What has been installed? What are the post-installation issues?
   Two environments have been installed: Test and Production. Each one has separate installation directories. Post-installation issues include configuring the system per your company size.
2. What are the licensing requirements?
   Interactive Workforce comes with licenses for two instances of ServletExec. Additional licenses must be purchased separately.

   The database application server, SQL or Oracle, must also be properly licensed. Licensing should account for the estimated maximum number of concurrent users expected on your implementation of Interactive Workforce.
3. How is the maximum number of concurrent users determined?
   The estimated number of concurrent users is based on the size of the company and expected use. Also, system availability should be taken into account. For example, a factory allowing access through one or two kiosk-installed computers will not need to allow for as many as a software company, where the majority of employees will have a desktop PC.
4. What are the Connection Pools, and how do they work?
   Connection pools are groups of connections between the STAPI on the one end, and the CYBIOs and CBSVOs of The Solution Series on the other. These connections are shared between requests in order to exchange information between the two ends.
5. What is the Split Point, and where is it configured?
   The Split Point is a configuration which determines the number of The Solution Series sessions available for use by Interactive Workforce, and it is configured in The Solution Series.

Chapter 4

Review of Questions Answered

1. What does the Secure Socket Layer (SSL) provide for the system?
   It adds a layer of security against unauthorized access to confidential information by encrypting transmitted data.
2. How should Interactive Workforce be accessed when set up at a kiosk?
   By starting up Internet Explorer in kiosk mode by using the -k switch.
3. Why does Interactive Workforce require Adobe Acrobat Reader?
   To allow the end user to view and print out tax forms.
4. How do I maintain tax forms in Interactive Workforce?
   Tax forms must be downloaded in .pdf format from the tax authority web site, then linked to the Tax Forms page in Interactive Workforce.
5. What are information links, and why should they be tailored for the company?
   Information links provide added, company-specific information regarding Interactive Workforce functionality, such as benefits descriptions. All Information links pages should be reviewed by a Human Resources associate at the company, and tailored to company requirements.

Chapter 5

Review of Questions Answered

1. What is the Interactive Workforce database? What does it contain?
   The Interactive Workforce database is a database supporting security and business rules for functionality within Interactive Workforce.

   It contains User Profiles for security access, options lists, and business rules for Interactive Workforce functionality.
2. How is the Interactive Workforce database updated? How often should this be done?
   User Profiles are updated by periodically running the Interactive WorkforceXPT to generate the Interactive WorkforceUser.txt file, then loading that file into the database by running the LoadUser,bat script.

   This should be performed whenever there has been a new employee added to The Solution Series.
3. How can I create a list of login names and initial passwords to distribute to employee users?
   You can use the SQL Query Analyzer to generate a list of employee User IDs and initial passwords.

Chapter 6

Review of Questions Answered

1. What are audit reports, and when do they need to be run?
   Audit Reports are reports on changes that have been made using the system. They should be run as part of every payroll run.
2. Will access to *Interactive Workforce* be available during a payroll run?
   No. Access to Interactive Workforce will be unavailable during a payroll run, as the scripts which perform the payroll run will be modified to suspend operation of the STAPI. This is to ensure data integrity.
3. What modifications have been made to the payroll run scripts in order to fully integrate *Interactive Workforce* with *The Solution Series*?
   The pay extract script must be modified to suspend operation of the STAPI.

   The payroll run script must be modified to support the Interactive Workforce Pay Run (7L7L) report generator.

   The maintenance run script must be modified to support the Payslip (7M7M) report generator.

   The pay merge script must be modified to resume STAPI operation.

Chapter 7

Review of Questions Answered

1. What is the Pay Information database? What does in contain? How is it maintained?
   The Pay Information database is a database supporting pay functionality within Interactive Workforce.

   It primarily contains pay history and deductions information.

   It is updated every payroll run by taking several files generated as part of the payroll run, then loading them into the Pay Information database by running the LoadPayInfo.bat script.

2. What other issues should I be aware of regarding the maintenance of the Pay Information database?
   Paychecks that fall in between full payroll runs may need to be updated separately in the Pay Information database, or they will not appear until the next update performed after the next payroll run.

Chapter 8

Review of Questions Answered

1. What is the difference between Basic customization and Advanced customization?
   Basic customizations require only a basic knowledge of HTML, or are performed using parameters in existing files. Basic customizations include changing the background color of the web pages and adding new html links.

   Advanced customizations require new and/or edited java beans, or more complex changes to JSPs. These should be performed only by Cyborg Professional Services.
2. What is the Style Sheet, and how is it used?
   The Style Sheet is a cascading style sheet used to define elements of the web page. It is edited using a text editor, and the changes take effect immediately the next time a web page is accessed.
3. Where do I go to change text on a web page?
   Text on a web page can be changed using resource files, which the Display Logic (JSPs) pull text strings from.
4. How can I use different initial passwords?
   By editing the Interactive WorkforceXPT script at first implementation of Interactive Workforce.

Index

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