

Payroll Coordinator

**Request
iExpense
Manager
Change in
CV360**



CloudVergent 360

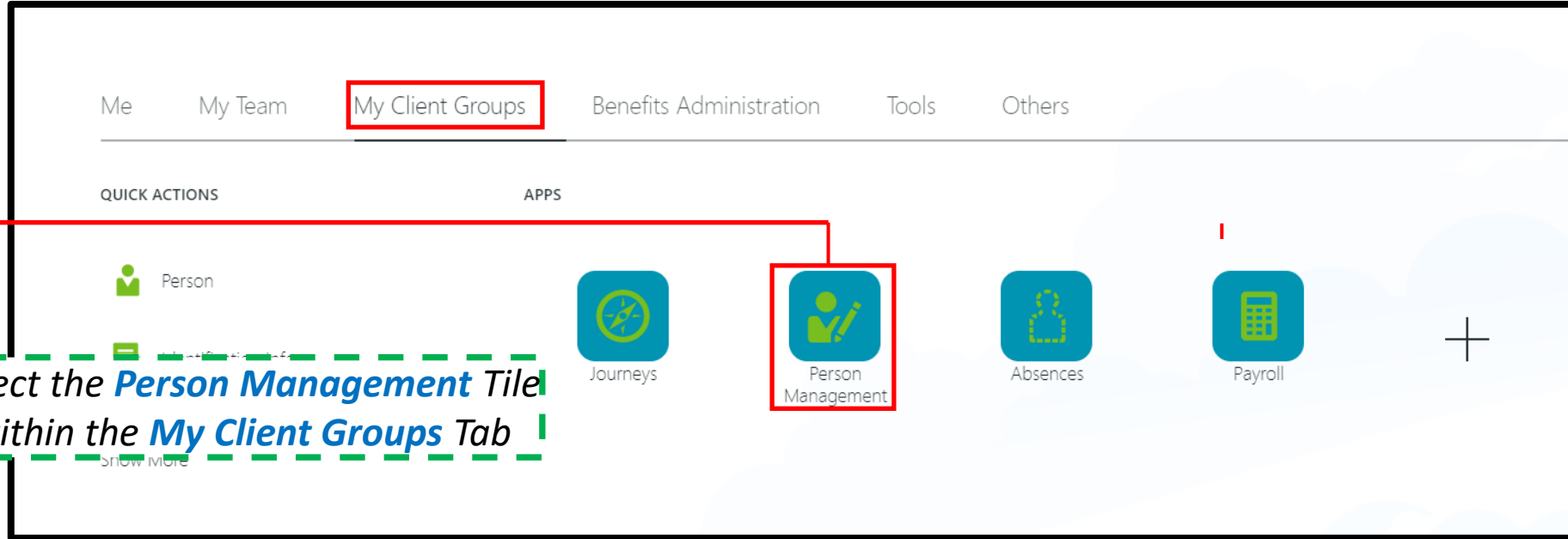
Payroll Coordinators

Change of iExpense Manager in CV360

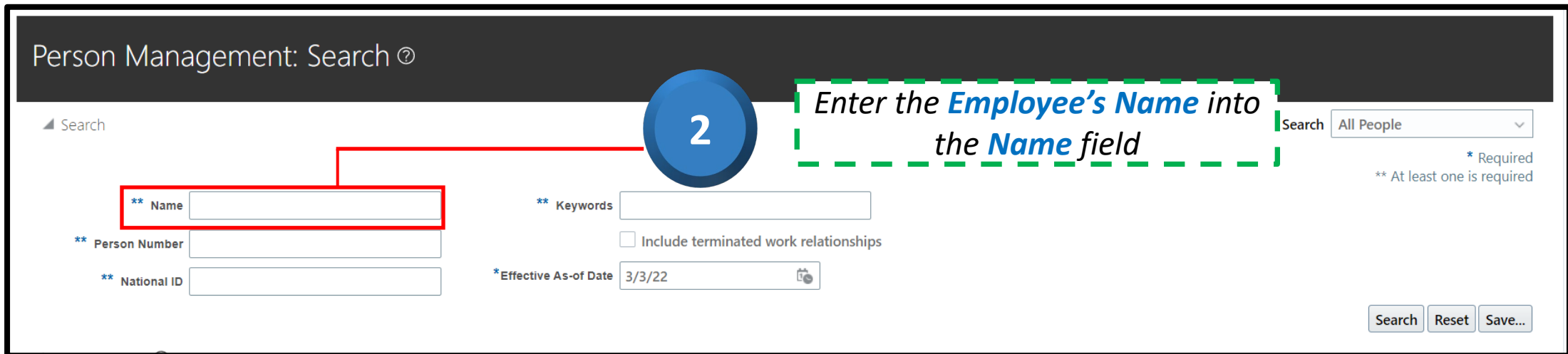
Make sure to use either Chrome or Firefox as your browser



Change iExpense Manager



The screenshot shows the iExpense Manager dashboard. At the top, there is a navigation bar with tabs: Me, My Team, My Client Groups (highlighted with a red box), Benefits Administration, Tools, and Others. Below the navigation bar, there are two sections: QUICK ACTIONS and APPS. In the QUICK ACTIONS section, there is a 'Person' tile. In the APPS section, there are tiles for Journeys, Person Management (highlighted with a red box), Absences, and Payroll. A red line connects a blue circle with the number '1' to the Person Management tile. A green dashed box surrounds the Person Management tile with the text: 'Select the **Person Management** Tile within the **My Client Groups** Tab'.



The screenshot shows the 'Person Management: Search' page. At the top, there is a search bar with a dropdown menu set to 'All People'. Below the search bar, there are several input fields: '** Name' (highlighted with a red box), '** Person Number', '** National ID', '** Keywords', and '* Effective As-of Date' (set to 3/3/22). There is also a checkbox for 'Include terminated work relationships'. At the bottom right, there are buttons for 'Search', 'Reset', and 'Save...'. A blue circle with the number '2' is connected by a red line to the '** Name' field. A green dashed box surrounds the search bar with the text: 'Enter the **Employee's Name** into the **Name** field'. On the right side, there are notes: '* Required' and '** At least one is required'.

Change iExpense Manager

3

Select the **Employee's hyperlinked** Name to search the employment record


| Name | Person Number | National ID | Department | Location | User Person Type | Job | Assignment Status | Actions |
|----------------------------|---------------|-------------|------------|---------------|------------------|---------------------------|-------------------|---|
| [Redacted] | | | | PS-COMM - ... | Employee | 99555 - Departmental I... | Active - Payr... |  |

Columns Hidden 11

3

From the **Employment Page**, Select Update from the Edit drop-down list

Employment

Work Relationship 

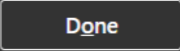

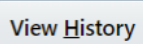
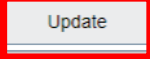
Legal Employer DeKalb County GA
Worker Type Employee
Hire Date 10/23/17

Country United States

Assignment:

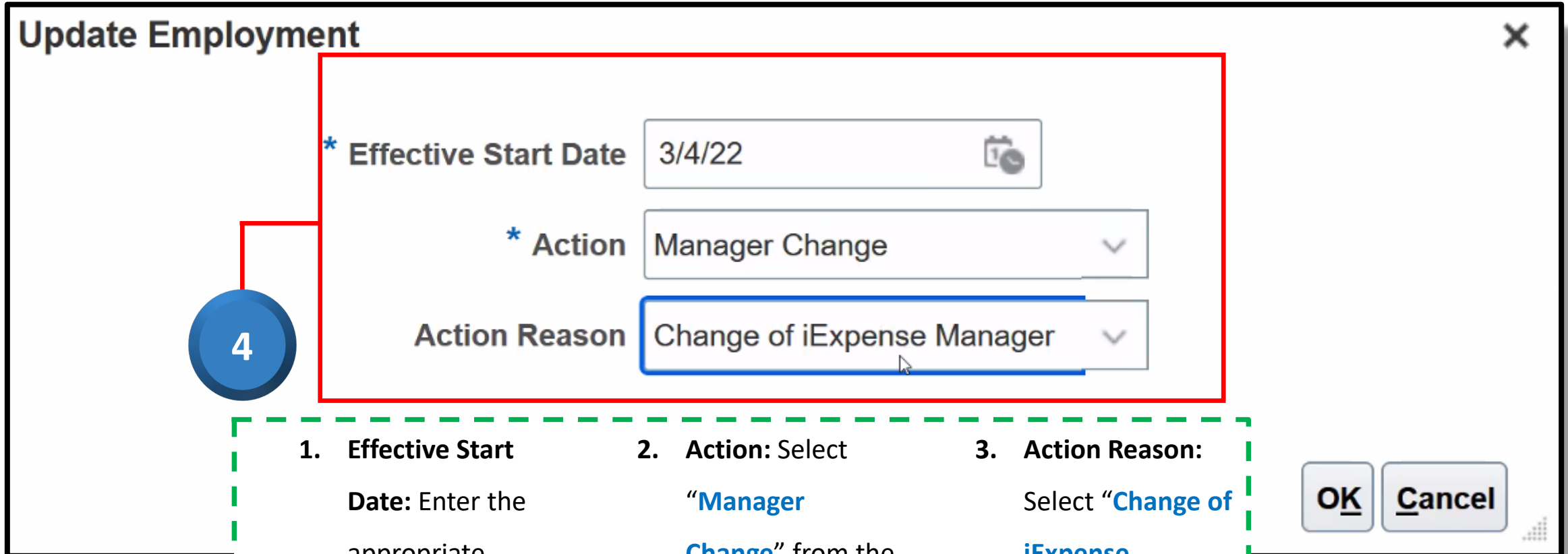
Action Synchronization From Position
Action Reason

Effective Start Date 1/16/22 (2 of 2)
Effective End Date

Change iExpense Manager

Enter the appropriate data on the **Update Employment** pop-up



4

1. **Effective Start Date:** Enter the appropriate **Effective Start Date** for the iExpense Approver Change
2. **Action:** Select “**Manager Change**” from the **Action** drop-down list
3. **Action Reason:** Select “**Change of iExpense Manager**” from the **Action Reason** drop-down list

Change iExpense Manager

Update Employment [Close]

* Effective Start Date [Calendar]

* Action

Action Reason

5

Select **OK** on the Update Employment pop-up

5

Select a new manager from the **iExpense drop-down list**

Headcount 1

Start Time [Dropdown]

End Time [Dropdown]

Basis for Seniority Calculation

Work Measure Details

ACA Eligibility

ACA Full Time

Merit Status

Company

Division Code

AD Account Required

Additional Employment

Interim Position

Acting Position

iExpense Approver

People Group

Change iExpense Manager



Edit Employment: Manager Change

6

Review

Save

Submit

Cancel

Work Relationship ⓘ

Legal Employer DeKalb County GA

Worker Type Employee

Hire Date 10/23/17

Select the **Review** button to view the **iExpense Approver** change

Assignment: 99555 - Departmental IT Specialist ⓘ

Action Manager Change

Action Reason Change of iExpense Manager

Effective Start Date 3/3/22 (1 of 1)

Effective End Date

Note: You may validate **Assignment** change on the Edit Employment: **Manager Change** page

Change iExpense Manager

6

Edit Employment: Review

Printable Page Back Review Save **Submit** Cancel

Effective End Date

Assignment: 99555 - Departmental IT Specialist

Assignment Details

| Attribute | Current Value | Proposed Value |
|-----------|---------------|----------------|
|-----------|---------------|----------------|

Job Details

| Attribute | Current Value | Proposed Value |
|-----------|---------------|----------------|
|-----------|---------------|----------------|

Assignment Attributes

| Attribute | Current Value | Proposed Value |
|-------------------|---------------|----------------|
| iExpense Approver | [Redacted] | |

Select the **Submit** button to route the **iExpense Approver change request** for Manager Approval

Note: A Warning message may appear for some users. Read the message and Select "Yes" to route your iExpense Request for Approval.

Warning [Close]

The request will be submitted. Do you want to continue? (HRC-1035163)