# CONTENTS

## Overview
- The New User Interface ........................................................................................................ 9
- Supported Mobile Operating Systems.................................................................................... 9

## User Basics
- Log In View ............................................................................................................................. 10
  - Google SSO on Mobile App .................................................................................................. 10
  - Touch ID – See Security Section ......................................................................................... 10
  - Face ID – See Security Section ............................................................................................ 10
- Mobile Messages ...................................................................................................................... 11
  - Connection Lost Message .................................................................................................... 11
  - Non-Access Message ............................................................................................................ 11
  - Offline Localization Messages............................................................................................. 11
- Simple Navigation .................................................................................................................... 12

## Home View & Widgets
- Clock .......................................................................................................................................... 16
- Announcements ........................................................................................................................ 16
- My Benefits ............................................................................................................................. 17
- My Pay .................................................................................................................................... 18
- Timesheet Chart ...................................................................................................................... 19
- Time Statistics .......................................................................................................................... 20

## Search Box
- Recruitment ............................................................................................................................. 20
- Talent Matrix - Succession ....................................................................................................... 21
- Perspectives ............................................................................................................................. 21
- Sticky Notes .............................................................................................................................. 22
- Turtles ....................................................................................................................................... 22

## My Mailbox
- My To Do Items ...................................................................................................................... 23
- Table of Supported To Do Items ............................................................................................. 23
- My Notifications ...................................................................................................................... 26
- My Checklists .......................................................................................................................... 27

## Global Navigation Menu
- Global Navigation Menu .......................................................................................................... 28

## My Profile
- My Profile................................................................................................................................. 29
- Uploading Your Profile Picture ................................................................................................. 29

## Common Icons
- Common Icons.......................................................................................................................... 30

## Getting the New UI to Users
- Rolling Out the New UI to Users ............................................................................................ 33
- Downloading the Mobile App .................................................................................................. 33
- Kronos Ready Workforce Mobile ............................................................................................ 33
- HCMTToGo App ....................................................................................................................... 34
- First Time Login ....................................................................................................................... 34

## Administrative Information
- Administrative Information....................................................................................................... 36
# Security & Configuration

Security

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>48</td>
</tr>
</tbody>
</table>

Enabling New UI by Security Profile

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>48</td>
</tr>
</tbody>
</table>

New UI Preferences Widget - Security Settings

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>48</td>
</tr>
</tbody>
</table>

Touch ID on Mobile

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
</tr>
</tbody>
</table>

Face ID on Mobile

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
</tr>
</tbody>
</table>

Clock

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
</tr>
</tbody>
</table>

Security Settings - My Profile

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>52</td>
</tr>
</tbody>
</table>

Security Settings - Cost Centers Widget

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>52</td>
</tr>
</tbody>
</table>

Security Settings - Base Compensation Widget

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>53</td>
</tr>
</tbody>
</table>

Security Settings - Managers Widget

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>54</td>
</tr>
</tbody>
</table>

Security Settings - To Do Items, Checklists and Mailbox Notifications

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
</tr>
</tbody>
</table>

Team Security Settings

<table>
<thead>
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<td>55</td>
</tr>
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</table>

Scheduler Security Settings

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
</tr>
</tbody>
</table>

Schedule Shift Swaps/Open Shifts/Request for Coverage

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
</tr>
</tbody>
</table>

Scheduler Delegation

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
</tr>
</tbody>
</table>

Skills

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
</tr>
</tbody>
</table>

Scheduled Cost Centers

<table>
<thead>
<tr>
<th>Page</th>
</tr>
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<tbody>
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Payroll Security Settings

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</tbody>
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Pay History

<table>
<thead>
<tr>
<th>Page</th>
</tr>
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<tbody>
<tr>
<td>56</td>
</tr>
</tbody>
</table>

Pay Information Widget Settings

<table>
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</table>

TLM Security Settings

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>57</td>
</tr>
</tbody>
</table>

Time Tracking Security Options – Timesheets, Time Off, Schedules

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>57</td>
</tr>
</tbody>
</table>

Timesheet Change Requests*

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>58</td>
</tr>
</tbody>
</table>

Mobile Punch Settings

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>59</td>
</tr>
</tbody>
</table>

Manager Attendance Board/Attendance Indicators

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>59</td>
</tr>
</tbody>
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Time Off Security Settings

<table>
<thead>
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</tr>
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Security Permissions for Manager Time Off Requests

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Timesheets – Pending Approval

<table>
<thead>
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</tr>
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</tbody>
</table>

Timesheets

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

Timesheets – Corrections

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>62</td>
</tr>
</tbody>
</table>

HR Security Settings

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
</tr>
</tbody>
</table>

Position Hierarchy Chart

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
</tr>
</tbody>
</table>

Benefit Plans

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
</tr>
</tbody>
</table>

HR Checklists

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
</tr>
<tr>
<td>Section</td>
</tr>
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<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Favorites Menu</td>
</tr>
<tr>
<td>Favorites</td>
</tr>
<tr>
<td>Start Widget in New UI Dashboard Layout Profile</td>
</tr>
<tr>
<td>Favorites Security</td>
</tr>
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<td>Start Widget</td>
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<tr>
<td>Allowed Windows in Dashboard</td>
</tr>
<tr>
<td>Activating Favorites Menu</td>
</tr>
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<td>Configuring a Start Widget</td>
</tr>
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<td>My Info Menu</td>
</tr>
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<td>My Information</td>
</tr>
<tr>
<td>My Time</td>
</tr>
<tr>
<td>Timesheet Menu</td>
</tr>
<tr>
<td>Timesheet</td>
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<tr>
<td>Timesheet Exceptions in Time Entry and Calc Detail Pages</td>
</tr>
<tr>
<td>Locked and Unlocked Timesheet Status</td>
</tr>
<tr>
<td>Uploading Documents to Timesheets</td>
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<td>Time Punch GeoFencing</td>
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<td>Change Requests</td>
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<td>Time Off</td>
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<td>Request</td>
</tr>
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<td>History</td>
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<td>Balances</td>
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<td>Open Absences</td>
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<td>Accrual History</td>
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<tr>
<td>Overtime</td>
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<td>Request</td>
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<td>History</td>
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<td>Leave</td>
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<tr>
<td>Request</td>
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<tr>
<td>History</td>
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<tr>
<td>Request</td>
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<tr>
<td>My Schedule</td>
</tr>
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<td>Schedule</td>
</tr>
</tbody>
</table>
Things You Need to Know ........................................................................................................................................161

Team Menu....................................................................................................................................................................162

My Team Menu .................................................................................................................................162
Time Menu .....................................................................................................................................................164
Accruals ..........................................................................................................................................................166
Leave.................................................................................................................................................................167
Schedule Menu ..................................................................................................................................................168
Benefits Menu ................................................................................................................................................169
HR Menu ........................................................................................................................................................170
Talent Menu .....................................................................................................................................................172
Learning Menu ................................................................................................................................................173
Compensation Menu ......................................................................................................................................174
Recruitment Menu .........................................................................................................................................175
Payroll Menu ................................................................................................................................................176
The New User Interface

Mobile users can access the system from the new mobile app, which can be downloaded from the app store on their mobile device. This user interface is responsive to the mobile device in use. In other words, if you download the mobile app on a phone, the user interface will shrink-to-fit into that screen. If you download to a tablet, the user interface will expand to fit that screen. The responsive design prevents excessive scrolling allowing you to easily access the options and portions of the screen you need.

Supported Mobile Operating Systems

**NOTE:** The list shown in the table below are operating systems we support, though they may not be actively tested.

<table>
<thead>
<tr>
<th>Platform</th>
<th>OS Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td></td>
</tr>
<tr>
<td>iOS</td>
<td>11.4.1 -&gt; latest</td>
</tr>
<tr>
<td>Android</td>
<td>6.0.1 -&gt; latest</td>
</tr>
</tbody>
</table>

User Basics

The following explanations and examples show what users can experience using the Mobile App or using the mobile experience on a desktop. The features shown in this guide are accessible by all types of users, employees and managers.

**Important Note:** The images are examples only and may not match your screens due to configuration differences between our Demo Company and your company. Some users will have more options and some users will have fewer options than what is shown.
Log In View
From the Log In screen, enter your company provided credentials and tap the *Login* button. Or, if Touch ID/Face ID has been enabled for you, use your registered finger or face to log in. For information on enabling biometric log in, please see the *New UI Preferences* information in the Security section.

Google SSO on Mobile App
Users utilizing the New UI Mobile App can authenticate their log in with Google SSO (Single Sign On). This option requires that companies have installed and are using the *Google Cloud (formerly called Google for Work) Integration* Marketplace product.

Additionally, users can only log in using their company’s Google Cloud user account. Consumer accounts will not work. Users need to have their primary email address set as their Google Cloud address to use this functionality.

Touch ID – See Security Section
Face ID – See Security Section
Mobile Messages
Various messages can display to users if they don’t have access, a connection is lost, or the application is offline.

Connection Lost Message
When a user’s connection is lost, the mobile application will display the message *Your internet connection is lost. Please check your network settings*. This notification will pop up when there is no network, the server is not available, or a VPN connection is lost.

Non-Access Message
When a user who is assigned a Security Profile that does not have the *Enable Mobile* option selected attempts to login to the Mobile App, the user is re-directed to a new page with an error message that reads: *Whoops! Looks like you are not authorized to use mobile application. Please contact your system administrator to get mobile access.***

Offline Localization Messages
When utilizing the mobile application, offline localization uses the appropriate language in the labels for the messages on mobile devices. Initially, upon the first successful login, the device's locale is used. After the first successful login, the company's locale is saved and used. The priority of the locale to be used is as follows:

- The user configured language, where available.
- The device language, if it is supported by the mobile app.
- English is used as the default/fallback language.

This priority applies to the translations of all hybrid (mobile pages not written to be exclusively for mobile) screens, Touch ID/Face ID errors on the login screen, and the Touch ID authentications dialog on Android.

For the permission messages, only the device locale can be used as it is driven by the system itself.

**NOTE:** Permissions on Androids and IOS use device language only. Additionally, for the languages that are not supported, detailed messages are in English, whereas the title and buttons use the device language.
Simple Navigation

Navigation through the menus is easy. A menu is accessible from the “hamburger icon” in the upper-left corner of the application. After navigating to an option, the hamburger menu will slide out of view while you work. To return to your menu, simply tap the hamburger icon again and the most recent navigation menu path selected will display again.

After tapping the “hamburger” menu icon, and navigating to the desired page, the menu is pinned; the next time you open the hamburger menu it automatically opens to the last selected path. In addition, if a page containing large amounts of detail is displayed, the menu path replaces the tabs at the top of the page after scrolling down.
Search Box
To quickly find a menu item or menu path, type key words or partial phrases into the Search box.

![Search Box Example]

Even employees can be typed into the Search box. Employees will display with Quick Links icon that can be clicked to open the pop-up and navigate to another area for the employee.

![Employee Search Example]

If no results are found, a *No results found* message will display.

![No Results Found]

Recent searches can be displayed by typing *Recent* in the Search box. The five most recent search results are shown as soon as a user clicks on the Search field/box. Once a user begins typing, the recent searched are hidden. This is by user account and the system will remember the last search even if you switch from a desktop to a mobile device.
Home View & Widgets

After logging in, the Dashboard or landing page will display. Your company may have information on this page, such as a welcome message or announcements. Today’s date/time will display and depending how your system has your time entry function configured, you may be able to view your timesheet, register a simple punch, punch in, punch out, or register a transfer punch.

Your company may have other options, or widgets on your dashboard such as Announcements, My Benefits, My Pay, Timesheet Chart, and Time Statistics. Many of these options contain hyperlinks that will allow you to view and perhaps take certain actions.

The Home view contains a background of a cityscape with a blue overlay containing the widgets. The employee information at the top of the banner contains the following attributes and is not editable from this view.

- The employee’s image/picture loaded from the employee’s account in Employee Information. The picture is not editable or clickable from this view.
  - If no employee picture is available, the employee’s initials (first and last) with a blue background display, i.e., for example: “JS” for John Smith.
- The employee’s full name and employee ID from their primary EIN account, with the employee ID in parentheses.
- The employee’s Job/Position title from their primary EIN account. The default job value displays, or if the Position Management functionality is enabled, the name of the employee’s current, primary assigned position displays.
  - If no Job/Position title values are available, the Job/Position title line does not display in the banner.
- The name of the employee’s primary or secondary EIN displays after the Job/Position title. Whether primary or secondary displays depends on which EIN the employee is signed into.
- The employee’s hire date followed by employment length in parentheses. The date follows the EIN Global date format or Locale date format assigned to the EIN account.
Clock
If your company requires you to clock in/out, you can do so from this widget. This widget will display the current
date/time/time zone. A hyperlink for your timesheet is available here, as well as options to allow you to quickly clock
in or clock out, as well as perform job transfers through the Change Cost Center option. The options shown here may
differ from how your company has your Clock widget configured.

Announcements
Your company may place special announcements on your dashboard. You can view these by tapping on either the
Info icon or the arrow. To close the announcement, tap the X or tap Close.
My Benefits

In the My Benefits widget, you can view your current benefit plans, and when available, you can enroll in benefits during an open enrollment period, or to process a life change event.

Tap the View Benefits hyperlink to be taken to the page containing your existing benefits and enrollments. Tap the Back arrow at the top of your session to return to the home page, one page at a time; or, you can tap the hamburger icon and tap the Home icon.
My Pay

In the My Pay widget, you can see a countdown until your next pay. By tapping the View Pay History hyperlink, you can view your pay history, and if authorized, you can view and possibly add direct deposits. An e-signature agreement is located here to allow you to agree to receive your pay statement electronically.

If authorized, you can tap the download Pay Statement link and the pay statement will display in PDF on a separate page. From there, you can download and save the PDF to your device. To return to your session without having to logout, tap the name of your app at the very top-left of your device.
Timesheet Chart
The Timesheet Chart widget will display, in real time, your total hours for each day of the current week. The current day will display as highlighted. The data will update automatically as time is added to your timesheet.
Time Statistics
The Time Statistics widget will display your current balances for the type of time shown. The data will update automatically as time is added to your timesheet, or accrual balances are used.

Recruitment
For companies using the Recruitment module Marketplace product, this widget can provide HR managers with information about job requisitions, open requisitions, and the status of the open requisitions. Selectable links and selectable numbers are available to view more details.
**Talent Matrix - Succession**

For HR companies using Succession Management, the Succession widget can be added to managers. The Succession tile pulls data from the user’s talent matrix widget which can be configured, for now, in the Classic UI. Managers can use this tile to gauge readiness and benchmark the strength of their team for possibly filling higher level positions as they become available.

**Perspectives**

For companies using Employee Perspectives functionality, the *Perspectives* tile is available to be added to user dashboards.

- The tile is available to be added to the New UI Dashboard Layout profile, located under *Company Settings > Profiles/Policies > New UI Dashboard Layout*. The window is named *Team Perspectives* and can be added to the profile.
- The tile will display in the Home dashboard for mobile users and is named *Perspectives*. The *View Perspectives* hyperlink will open the *Perspectives Score* report and display all included employees and perspectives, along with the scores for each.
- To view the makeup of the team perspective score for each perspective, click the associated hyperlink. A report will open displaying each employee and their individual scores used to determine the average team score.
- If there are more than 6 perspectives, the directional arrows will move to the next page and back again.
Sticky Notes
Up to 10 notes can be used. To add a note, click the drop-down to activate the next note. The gear icon contains options to change the color of the note, or to clear the contents of the note. Any note can be edited at any time.

Turtles
This widget is for fun and you can feed your turtles food by clicking anywhere on the widget’s background. Settings are available to change the number of turtles (up to 5) and changing the background color. Users can also opt to turn the turtles off. This will not remove the widget but will simply remove the turtles from the widget.
My Mailbox
The bell icon is the user’s mailbox and will display any system generated emails, checklist items, or To Do Items. Tap to open the mailbox icon and view any actions requiring your attention. This icon can be used at any time, within any menu. To return to the page you left, tap the back arrow to return. Each tab contains a Refresh option, Sort option, and Filters to help shorten the list and return certain types of requests or notifications.

Security settings will control user access to the tabs. The settings are located within the Tools & Documents section of the ESS tab of security profiles. The My Notifications (Mailbox) setting contains the additional option of allowing users to delete their notifications.

My To Do Items
Under the My To Do Items tab are items requiring your attention. Pages containing links to additional information, forms or buttons can be used to complete tasks. A warning message will display to users who either don’t have the proper permissions to work with the To Do Item, or to inform the user if the workflow configuration is incorrect.

Table of Supported To Do Items
The types of To Do items that are supported on the My To Do Items tab are listed in the table below.

<table>
<thead>
<tr>
<th>Workflow Type</th>
<th>To Do Type(s)</th>
<th>Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>The following filter options have been added for To Do's:</td>
<td>December 2019</td>
</tr>
<tr>
<td></td>
<td>Manager, Cost Center, Employee EIN (if Multi-EIN is enabled for the company), Employee Full Name, Employee ID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The filter panel contains the following fields:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Created Date (From and To), To Do Types, Manage Filter, Cost Center Filter, Employee Filter, EINs</td>
<td></td>
</tr>
</tbody>
</table>
| N/A                  | **My To Do Items** tab > **View as Report** page level action  
Click **View as Report**, report with *My To Do Items* report opens.  
*My To Do Items* report includes **Export** functionality (Excel, CSV, PDF, etc.). User selects file type via same popup as reports. | December 2019 |
|---------------------|---------------------------------------------------------------|---------------|
| N/A                 | **Employee Quick Links** available via the To-Do Item  
**Employee Name** links to the **Employee Profile** | August 2019   |
| **Performance Review Request** | **Create Goals**                                           | August 2019   |
| **Benefit Plan Change Request** | **Approve**  
**Reject**                                               | August 2019   |
| **Benefit Enrollment: EOI Review** | **Approve**  
**Reject**                                              | August 2019   |
| **Checklist Item Request** | **Approve**  
**Reject**                                               | August 2019   |
| **Counter Approval and Distribution** | **Distribute**                                          | August 2019   |
| **HR Action Request** | **Approve**  
**Reject**  
**Terminate**                                                | August 2019   |
| **Individual Data Removal** | **Approve Data Removal Request**  
**Reject Data Removal Request**                              | August 2019   |
| **Scheduler Open Shift Request** | **Approve Open Shift Request**  
**Reject Open Shift Request**                                 | August 2019   |
| **Scheduler Posting Workflow** | **Approve Schedule Posting**  
**Reject Schedule Posting**                                   | August 2019   |
| **Custom Form**     | **Approve**  
**Reject**                                               | August 2019   |
| **Performance Review** | **Employee Sign**  
**Finalize**  
**Review**  
**Review Comments**                                      | June 2019      |
| **Attestation**     | **Question**                                               | June 2019      |
| **Scheduler Coverage Request** | **Approve Coverage Request**  
**Reject Coverage Request**                                   | June 2019      |
| **Scheduler Shift Swap** | **Approve Shift Swap Request**  
**Reject Shift Swap Request**                                  | June 2019      |
<table>
<thead>
<tr>
<th>Activity</th>
<th>Actions</th>
<th>Date</th>
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<tbody>
<tr>
<td>Timesheet Request</td>
<td>Auto Approve Timesheet</td>
<td>April 2019</td>
</tr>
<tr>
<td></td>
<td>Auto Reject Timesheet</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approve Timesheet</td>
<td></td>
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<td></td>
<td>Reject Timesheet</td>
<td></td>
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<td></td>
<td>Approve Time Entries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reject Time Entries</td>
<td></td>
</tr>
<tr>
<td>Individual Data Removal</td>
<td>Approve</td>
<td>April, 2019</td>
</tr>
<tr>
<td></td>
<td>Reject</td>
<td></td>
</tr>
<tr>
<td>Incident Types</td>
<td>Approver Sign</td>
<td>February, 19</td>
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<tr>
<td></td>
<td>Close Incident</td>
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<tr>
<td></td>
<td>Employee Sign</td>
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<td></td>
<td>Approve / Reject</td>
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<td></td>
<td>Collect Note</td>
<td></td>
</tr>
<tr>
<td>Job Requisition</td>
<td>Approve/Reject</td>
<td>February, 19</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Display Message</td>
<td>February, 19</td>
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<tr>
<td></td>
<td>Question</td>
<td></td>
</tr>
<tr>
<td>Hiring Stage Change Request</td>
<td>Initiate HR Action</td>
<td>February, 19</td>
</tr>
<tr>
<td>HR Action Request</td>
<td>Initiate HR Action</td>
<td>February, 19</td>
</tr>
<tr>
<td></td>
<td>Collect Note</td>
<td></td>
</tr>
<tr>
<td>Leave Of Absence Requests</td>
<td>Collect Note</td>
<td>February, 19</td>
</tr>
<tr>
<td>Timesheet Request</td>
<td>Collect Note</td>
<td>February 2019</td>
</tr>
<tr>
<td></td>
<td>Auto Approve Timesheet</td>
<td>April, 2019</td>
</tr>
<tr>
<td></td>
<td>AutoReject Timesheet</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approve Timesheet</td>
<td></td>
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<tr>
<td></td>
<td>Reject Timesheet</td>
<td></td>
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<tr>
<td></td>
<td>Approve Time Entries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reject Time Entries</td>
<td></td>
</tr>
<tr>
<td>Overtime Request</td>
<td>Activate Contract</td>
<td>February, 19</td>
</tr>
<tr>
<td>Time Off Request</td>
<td>Activate Contract</td>
<td>February, 19</td>
</tr>
<tr>
<td></td>
<td>Collect Note</td>
<td></td>
</tr>
<tr>
<td>Virtual Code: Account Approval</td>
<td>Approve / Reject</td>
<td>February, 19</td>
</tr>
<tr>
<td>HR Action Request</td>
<td>Approve/Reject</td>
<td>October, 2018</td>
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<tr>
<td></td>
<td>Initiate HR Action</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Terminate</td>
<td></td>
</tr>
<tr>
<td>System Defined Workflow*</td>
<td>Form W4</td>
<td>December, 2018</td>
</tr>
<tr>
<td>System Defined Workflow*</td>
<td>Form I9</td>
<td>December, 2018</td>
</tr>
<tr>
<td>Timesheet Change Request</td>
<td>Approve / Reject</td>
<td>2018</td>
</tr>
</tbody>
</table>
Timesheet Change Request

*A system-defined workflow will automatically trigger the creation of the To Do Item following a user’s action. For example, following creation of the form the To Do Item for completion of the form is created.

My Notifications
Under the My Notifications tab, any emails generated by a system notification will display here. This tab contains multiple icons to process the notifications.

- The Envelope/Arrow icon will allow you to forward the notification to your company registered email address.
- The Eye icon will allow you to mark a notification as read.
- The Eye/Slash icon will allow you to mark a notification as unread.
- The Trashcan icon will allow you to delete a notification.

When opening a notification for viewing, you will also have the option to forward or delete the notification. Tapping Ok will remove the notification from the Unread list. Tapping Close Unread will close the notification and retain it in the list. Filters can be applied to order the list by Read or Unread.
My Checklists

The *My Checklists* tab will automatically add any checklist items requiring the employee’s attention. A number will display indicating how many items are under the tab. Users can view the item in their list and then select the *Go To Checklist* button to open the checklist and view and/or edit the checklist details.
Global Navigation Menu

The “hamburger” icon at the top-left of your session can be clicked to open the menu containing all pages that have been configured for your experience. There will be settings such as your Home icon, your Settings Gear icon, your Sign Out link, and other menu options. This menu can be accessed at any time, within any menu. You can also swipe to the right to activate the main menu, though this may vary by device. Once active, it can be closed by tapping the X in the rolled-out menu.

Tapping Home will return you to home page, or first page you see after logging in.

Tapping the drop-down in your profile will present the Change Company & Region option. For most users, this is a “set once and forget” option. Your company will need to provide you with the Company Shortname information for initial login with the app. If you travel to another region, you can change your market region information here, and if required, change the Company Shortname to the region’s company name.

Tapping the Sign Out link will log you out of your current session and return you to the Log In page.
My Profile

Your company may have some of your personal account information available to you in your profile. To access this information, tap your picture/name in the menu panel or navigate to My Info > My Information > My Profile. You may have access to edit some of the information through the Edit Information link in each section. Other options may also be available, such as your contacts, and notification preferences.

Uploading Your Profile Picture

To upload your own profile picture, you must be granted editing rights to your profile. If you have these rights, there will be an upload link in your picture once you open your profile.

Tap Upload New Photo and several options will display, allowing you to select existing photos or take a new photo to upload.
Tap **Choose** to add a photo. Tap **Remove Photo** to delete the photo completely. Caution: There is no confirmation when performing this action; the picture will immediately be removed with no ability to undo the action.

**Common Icons**

Icons, controls and links are frequently used to display pages containing additional information or requiring additional action on the part of the user. These commonly used elements are described below.

The “hamburger” icon is a horizontal triple stacked line. When tapped, it will access your main menu.

The back arrow will take you back one page at a time.

The bell icon is your Mailbox and will contain My To Do Items, My Notifications and My Checklists. The number indicates how many items are in your Inbox.

The picture (your picture), when tapped, will open your profile. If a picture hasn’t been uploaded, your initials will appear here instead.

Under the main menu, accessed after tapping the hamburger icon, the house icon will return you to your home page anytime no matter where you are in the application.

The gear icon, when tapped, will open your region and company short name settings, should they need to be changed. Typically, this is only set once upon initial log in and your company instructs you which settings to select.

The Sign Out link should be used when exiting the application. If it is not used, your session will time out according the number of minutes set by your company.

The single employee icon contains My Info menu options enabled by your company.

The multi-employee icon contains Team menu options for managers and supervisors.
The Main Menu link will return you to your main menu anytime, no matter where you are in the application.

Under the main menu, accessed after tapping the hamburger icon, your profile picture (if uploaded) will display along with your name. Tapping this will open your profile. If your picture has not been uploaded, this field will display your initials and will work the same way.

Tapping the X in the upper right corner of the main menu will close the main menu and leave you on the currently selected page.

When navigating through pages in the application, the chevron icon, when tapped, will display other menu options that are available. You can tap any of the items under the icon and navigate to that area.

Any page with a calendar indicates that the dates can be changed. Tap to open the calendar and select a different date. Other filters of the shape will appear in reports and allow you to filter the columns.

Any page with the funnel icon indicates that filtering criteria is available. Tap to open the filter settings and make a selection to change the data shown. A number next to the icon indicates the number of active filter settings.

The triple dot icon known as the Actions menu, indicates more options are available. Tap the icon to view and select an option.

Active links will display in blue, and links with drop-down arrows indicate there are additional options. Tap to view and select.
Drop-downs will display a list of options in a browse list on your mobile device where you will make selections. This will also display for date selections.
Rolling Out the New UI to Users

The New UI can be enabled without having to create new companies or change your existing configuration.

- **To roll out to your users** - You can control, by security profile, which users will receive the New UI experience. This can help you test out the New UI with specific groups prior to rolling it out to everyone in your organization. There is a *New UI Preferences* widget available in every security profile containing a checkbox for enabling the desktop and/or enabling the mobile experience. (see the Security section for more details.)

  - Checking *Enable Mobile* will allow users who have downloaded and configured the new mobile app to use the New UI on their mobile device.
  
  - Checking *Enable Desktop* will convert the user’s desktop view to the New UI experience. This will affect all users assigned to that security profile.

**NOTE to Administrators**: To quickly check out the desktop experience for yourself prior to rolling it out to your users, you can edit your URL to switch to the New UI desktop experience.

  - Instruct users to click the toggle: *Try Our New Look!* (located in the upper-right portion of their session) to switch to the New UI experience. Users can then click the same banner to return to the Classic UI.
  
  - Or you can edit your URL. To switch to the New UI Desktop Experience, in the URL, the letters ".hcm" will replace ".admin". The .hcm URL for the ABC company will be: https://{regional host name}/ta/ABC.hcm?rnd=.....

  - In the URL, a question mark (?) follows ".admin" – leave that in place, along with the entire rest of the text string.
  
  - The regional host name will vary depending on the company’s region.
  
  - To switch back to the Classic UI, replace ".hcm" with ".admin"
  
  - To change your users to the mobile experience, use ".home" instead of ".hcm"

**NOTE**: Additional configuration for the New UI Dashboard Layout should also be completed for all users, whether they access mobile or desktop, or both. Please see the *New UI Dashboard Layout Profile* content under the *Administrative Information* section below.

Downloading the Mobile App

The mobile app can be downloaded from the App Store or Google Marketplace on your mobile device. Two versions of the mobile app are available. The *Kronos Workforce Ready Mobile* app is available for direct customers of Kronos. The *HCMToGo* app is a white-labeled app for use by partners.

**Kronos Ready Workforce Mobile**

From the App Store or Google Marketplace, search for *Kronos Workforce Ready Mobile* and download the app. Examples from the iPhone App Store (left) and Google Play (right) are shown below.
HCMTGo App
From the app store, search for HCMTGo. The app is displayed as shown below.

First Time Login
You will need to provide your users with the Company Shortname information for initial login of the Mobile App and instruct them which option to select under Region. This page will only display upon using the app for the first time. For most users, this will be a “set once and forget” action.

However, for users who travel to different regions and need to change their market, and/or Company Shortname, they can access this screen any time from their main menu’s Gear icon, which is located under the hamburger menu (three stacked horizontal bars). Just ensure they have the proper credentials set up in the alternate company, so they can sign in.
<table>
<thead>
<tr>
<th>REGION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH AMERICA</td>
<td></td>
</tr>
<tr>
<td>EUROPE</td>
<td></td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td></td>
</tr>
<tr>
<td>[META] UATP</td>
<td></td>
</tr>
<tr>
<td>[META] PARTNER</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COMPANY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Shortname</td>
<td>democompany1</td>
</tr>
</tbody>
</table>
New UI Dashboard Layout Profile

The Home page within the application is configured through the New UI Dashboard profile, which is located under Company Settings > Profiles/Policies > New UI Dashboard Layout. A default profile is available to get you started. You can edit and/or clone this profile and then edit as needed.

This profile must be assigned to your employees if you wish for your users to have access to the widgets available in the New UI Home view. The assigning of the profile also controls whether the Home and Dashboard buttons display on the bottom of their hamburger menu.

First Screen Options

There are multiple areas in the system where First Screen options can be set. The First Screen option controls what a user will see as their first or home page when logging into the system.

In this field, you can select

- **Blank** – Users will see a blank page but can navigate using the hamburger menu.
  - If a user account has a null value for First Screen, as long as the user has a New UI Dashboard Layout Profile assigned in the Profiles widget of their employee account, they will see the New UI Dashboard (Home) page when logging in.
- **Security Profile Default** – Whatever is set in the First Field of the user’s security profile will be default.
- **Applicant: My Profile** – Will display the My Profile page applicants will see.
- **Company Employees** – Users will see employee they have access to.
- **My Saved Reports** – Users will see the saved reports page.
- **New UI Dashboard (Home)** – Users will see the New UI Dashboard profile.

Company Setup

In the Other Defaults section under the Defaults tab of Company Setup, a First Screen setting is available. When an employee is hired, this is automatically populated in their employee profile for the First Screen field. This is located under Company Settings > Global Setup > Company Setup.

Security Profiles

In the Security Profile widget of security profiles, the First Screen set here will populate a new hire’s First Screen field in their employee account. This value will override what is set in the Defaults widget of Company Setup.

Cost Centers

Administrators and/or managers can add the First Screen as a Cost Center default for a particular level. When an employee is hired and the Cost Center value is selected, the default settings pop-up will display the First Screen value. Once the employee is hired, this is automatically populated into their employee account for the First Screen field. If this value is set to something other than the Security Profile Default, the value overrides whatever is set in the Security Profile.
Employee Information

In employee accounts, the *First Screen* option listed in the *Account Information* widget has priority over all other areas of the system where a First Screen setting can be listed.

Mass Edit

Users with access to the Mass Edit Profiles functionality (*Company Settings > Mass Edit > Mass Edit Profiles*), can select multiple employees and set their *First Screen* field to either the *Security Profile Default* or another available value. Once the changes are applied, they will override whatever value was originally set in the employees' accounts.

**NOTE**: The security permissions for the *First Screen* field are in the Employee section on the HR and ESS tabs within the *Account/Personal Information* security item when the drop-down is set to View/Edit (Custom). The *First Screen* setting should be enabled for View and Edit.

Assigning Profiles

The profiles must be assigned to employees to make them available in the application. The profiles are effective dated so that you can schedule dashboards to become effective as of a specified date. Any employee assigned to the profile will be subject to the dates specified. The profiles can be assigned en masse through *Company Settings > Mass Edit > Mass Edit Profiles*. 
Configuring Dashboard Layout Profiles

For each profile, options to enable dashboards and buttons are available.

- **Name/Description/Active** – Enter the name and optional description of the profile. Uncheck Active if the profile is not to be used or assigned.

- **Show Home Dashboard** – Checking this option enables the Home view containing the employee banner and widgets.

- **Show My Dashboard** – Checking this option enables the My Dashboard option so users can create their own report charts.

- **Show Module Dashboards** – Checking this option allows managers to view and/or create dashboards under each enabled module under the Team menu. i.e. Time has a dashboard, Accruals has a dashboard, Schedule has a dashboard, etc. Under these dashboards, managers can add Report Charts that provide important information at a glance and will update in real time.

- **Hamburger Menu Settings**
  - **Show Home Button** – Checking this option will enable the Home button within the hamburger menu, and when tapped by the user, will display the Home dashboard.
  - **Show Classic Dashboard Button** – Checking this option will enable the Dashboard button within the hamburger menu, and when tapped by the user, will display their assigned Classic UI dashboard.
  - **Display following dashboard if none is set** – Allows for the selection of Dashboard or Dashboard (Premium) if no dashboard has been configured and set for the user.
• **Schedule** – Dashboard Layout Profiles can be effective-dated, and more than one time period can be added by clicking the Plus (+) sign and adding a new effective date. The profiles will become active as the dates roll up. Click the edit icon to open the dashboard to add/remove widgets.

**Schedule**
This dashboard contains only one (1) column to save space/scrolling since it can be used within the Mobile App. The **Available Windows** can be dragged and arranged in the desired order.

The user will see all the configured Available Windows on their Home view when logging in to the Mobile experience. Shown below are descriptions and examples of the dashboard widgets on a user’s home page.

**Available Widgets**

- **Start** – This widget will display the Favorites menu across the top of the user’s session. The **Start Widget Configuration** page, located under **Favorites > Configure Favorites**, can be accessed by users so they can customize their widget. They will have the capability to add a unique color and an icon to each Category for the Start Widget. Or, a Start Widget can be added to security profiles and users will inherit the dashboard set there.

- The **Default Start Widget** in security profiles is used to give users assigned to the profile the ability to modify the Start widget.

- Under the ESS tab of security profiles, in the **Dashboard: Allowed Windows** section, the **Start** widget should be enabled.

- **Clock** – This widget will display the current day, date, time, and user’s time zone. This widget is typically used by users who need to punch in/out or transfer to another cost center. A **View Timesheet** link will take the users to their current timesheet.

- **Announcements** – This widget is useful for communicating company information to all your users through the use of announcements, which can be configured under **Company Settings > Our Company > Announcements**. Users can tap the Info icon or arrow to read the announcement.

- **Pay** – This widget will display a countdown until the next pay. A **View Pay History** link will allow the user to view their recent and historical pay statements. When viewing pay, two tabs will display, one for Pay History and the other for Direct Deposit. Users can add new direct deposits from the Direct Deposit tab, and e-signatures are available, and when signed, the employee will receive their pay statements electronically.
• **Accrual Balances** – Displays the user’s current accrual balances. Info icons are available for each category and a pop-up will display more details.
  
  **Accrual Policies** (*Company Settings > Global Setup > Company Setup* in the **Accruals Policies** section) for the company/EIN should be set to:
  
  - Display Values in Hours and/or Days.
  - Drop-down in widget should show one or both when selected.
  - Adhere to the Accrual Profile and Global Policies for displaying values as hours or days, per bucket.
  - Display Days with 0-5 decimal places.
  - When a value is selected, the days-based values should express these values with the decimal places specified.
  - Data in the Accrual Balances widget must adhere to the *Subtract Scheduled Hours From Remaining Balance and Taken is Calculated From Beginning Of Accrual Year and Up To* settings chosen.
  - Visible Columns (enabled or disabled) that affect certain values displayed in the Tooltip such as Current Accrued, Taken, Current Balance, Available Balance, Taken, Scheduled, and Projected Balance.

  If no Accruals Profile is assigned to the user, the Accruals widget displays a message indicating they do not possess an Accruals profile. If the Accruals profile contains no rules/policies that include at least one bucket such as Vacation, the widget displays a message indicating such.

• **Team Perspectives** – The data in this tile is derived from Employee Perspectives, where a manager can view total metrics for their team. A filter is available to change the number of employees included in the totals.

• **Benefits** – This widget will display the user’s current benefit enrollments. A *View Benefits* link will allow the user to view their current benefits. When viewing benefits, two tabs will display, one for viewing Benefit Plans and the other for Enrollment in benefits.

• **Recruitment** – For companies using the Recruitment module Marketplace product, this widget can provide HR professionals with information about job requisitions, open requisitions, and the status of the open requisitions. Selectable links are available to view more details.

• **Succession Chart** - For HR companies using Succession Management, the Succession widget can be added to managers. The Succession tile pulls data from the user’s talent matrix widget which can be configured, for now, in the Classic UI. Managers can use this tile to gauge readiness and benchmark the strength of their team for possibly filling higher level positions as they become available.

• **Timesheet Chart** – This widget will display a graph of the employee’s currently calculated hours for the current days of the current week. If there are no hours registered, the bars will not display. The current day will be highlighted. The chart will continually update as hours are added to the timesheet.

• **Time Statistics** – This widget will display the configured time elements defined in the widget. The statistics will continually update as hours are added or removed. The *Time Statistic* widget contains additional settings, accessed by clicking the Gear icon.
• **Display** – Uncheck to not display this type of time statistic to the user on their dashboard widget.
• **Label** – Allows you to customize the name of this type of time statistic the user will see.
• **Type** – The type of time to show the user. Options include Time Entry Based, Counter Based, and Accrual Based.
• **Time Type** – The category of the time to show the user. Options include Calculated, Raw, and Pay Category.
• **Period** – The period of time to show the user. Options include Pay Period and Weekly.
• **Sticky Note** – Allows users to add notes for quick reference. Up to 10 notes can be added and the color of each note can be edited.
• **Turtles** – A fun widget where users can feed their turtles by clicking in the background to add food and keep them going. Configuration of the turtles is available where users can change the number of turtles (up to 5) and the background color (4 options), as well as the ability to show or hide the widget.
• **My Applicant Profile** – This widget works with the New Applicant Portal and is part of the HR Recruitment module. This widget cannot be used with the Mobile App and is only accessible from a browser, although a browser from a mobile device can be used. Applicants will get the Default New UI Dashboard Profile that is created by default when the New UI is enabled for a company, enabling them to create applicant profiles and apply for jobs. You can find more details about how to use this functionality in the Recruitment/Talent Acquisition User Guide.

**Reports Charts**

To allow your users to create report charts, this functionality must be enabled at the company level within the *Available Functionality* widget. Report Charts are graphical representations of report data. For more detail, see the Report Charts section of this document.
Changing Logo/Text - Look & Feel (New UI)

You can change the default logo image and text on the mobile app login page by editing the Logo Image and Text fields. This is done under Company Settings > Global Setup > Look & Feel > System Themes.

TLM - Timesheet Profiles & Workflows

The New UI mobile experience only supports approvals through workflows. These workflows replace notification approvals.

To streamline the number of timesheet profiles, the New UI supports only the Start/End (All Days) and Bulk Hours timesheet profile types. These timesheet profiles have been updated to allow users to be configured with the mobile timesheet experience.

For companies with the TLM sub-system enabled, the mobile experience will only support users who have the following configured:

- **Timesheet Profiles** – The only supported profiles are Start/End (All Days) and Bulk Hours. For managers to receive their employee’s submitted timesheets and then apply approvals, the timesheet profile assigned to the users must contain a timesheet workflow. Timesheet profiles are available under Company Settings > Profiles/Policies > Timesheets.

- **Workflows** – Approvals will only be available when using workflows. When converting to the New UI, timesheet workflows will automatically be created and assigned to all supported timesheet profile types. If you prefer, these workflows can be manually created and assigned to the supported timesheet profiles. Workflows are available under Company Settings > Global Setup > Workflows. They can also be accessed by clicking the Timesheet Workflow hyperlink within the Timesheet Profile.
For the Timesheet Workflow field to be available within the timesheet profile, you must enable workflows for timesheets. This is done within the Workflow Policies widget under Company Setup, located under Company Settings > Global Setup > Company Setup. This widget is typically located under the Global Policies tab.

The following message will appear. If there are no pending timesheets, click OK.

A default timesheet workflow is available under Company Settings > Global Setup > Workflows. This workflow can be used as-is or can be edited and customized to fit your company’s policies.

To add this workflow, navigate to Company Settings > Global Setup > Workflows and select Add Default. The system will prompt for a selection of a workflow type. Select Timesheet and click Add.

A prompt will display. Select either Approve Levels or Approve Levels (With Email Steps).

After completing the prompts, a new workflow will be generated. Name the workflow and save it. Be sure to assign the workflow to all affected timesheet profiles.

This table shows the types of workflows supported in the mobile experience; the steps supported in a default workflow, and the steps not supported when manually creating a workflow.

<table>
<thead>
<tr>
<th>Supported Workflow Types for Mobile</th>
<th>Supported Steps in Default Workflows for Mobile</th>
<th>Manually Created Workflow Steps Not Supported in Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timesheet</td>
<td>All steps</td>
<td>Approve/Reject Time Entries</td>
</tr>
<tr>
<td>Category</td>
<td>Steps</td>
<td>Actions</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>Time Off</td>
<td>All steps</td>
<td>Checklist, Collect Note, Activate Contract</td>
</tr>
<tr>
<td>Overtime</td>
<td>All steps</td>
<td>Checklist, Sign Opt-Out, Action: Modify</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>All steps</td>
<td>Checklist, Collect Note</td>
</tr>
</tbody>
</table>

**TLM - Offline Mobile Support**

For companies with the TLM sub-system enabled, offline support is available within the Mobile App. It allows the users of the devices to enter punches while the device is not connected to the internet. The system will automatically notify the users when the connection is restored. Once the user logs back in, the punches captured offline will be processed with a message to the user on successes and failures.

**Adding Cost Centers When Offline**

Employees can include cost centers with in/out punches when their mobile devices are offline. This reduces the amount of manual timesheet editing required from managers to ensure accurate labor tracking. Employees can select cost centers from a list of their most frequently used cost centers. The selected cost centers are stored on the device and transferred to the system following the first successful login after the device is back online.

Employees must have the appropriate permission in their timesheet profiles to store punches offline.
In the mobile experience, employees can tap on Change Cost Center on the Clock tab. If the device is online, the user can then browse to the cost center. The device will store up to nine cost centers in an MRU (Most Recently Used) list.

When a user taps on the Change Cost Center button and the device is offline, the MRU list will be presented to the employee and the employee's punch is stored with the selection from the MRU list. The next time the device is online and the employee logs in, the stored punches and cost centers that were selected from the MRU list are uploaded to the system.

Users can also select no cost center by selecting blank above the list. If no cost center is selected (or the field is blank), the blank value displays in the first line in the lookup. When a cost center is selected, an option labeled No selected cost center displays in the lookup to represent the none or blank value. This functionality applies to all areas in the system where the cost center can be selected.

The end of the path to the cost center is displayed in the MRU list. This portion of a long path is the most useful when selecting the correct cost center for a job transfer.

Access Profiles
Access profiles work with the Mobile Application, and access is regulated only by the Allow Mobile Access setting in the Access Profile.

The system will first look to the access profile assigned in the Profiles widget of employee accounts in Employee Information. If it is blank, the access policy designated in the employee's assigned security profile is applied. If neither one of these are specified, the access policy from the Company Information widget in the Company Edit screen is used.

If a user logs in via a mobile browser, the IP is checked.
Security & Configuration

After the Administrative functions discussed above have been configured, very little additional configuration is necessary. The configured components within your application will function in the mobile experience much the same as they do in your desktop experience. There are certain security settings that should be in place to ensure your users can access their data. This section discusses those settings and includes other helpful information.
Security

Unless otherwise noted, the security settings from the Classic UI carry over to the New UI and control the same functions. Some security settings in this section are shown to help you understand the relation of menu items to their security settings in the New UI.

Enabling New UI by Security Profile

Administrators can roll out the New UI mobile app by security profile. By being able to control the roll out by security profile can help you test out the New UI with specific groups prior to rolling it out to everyone in your organization.

A New UI Preferences widget is available in every security profile and contains a checkbox for enabling the mobile experience.

- Checking Enable Mobile will allow users who have downloaded and configured the new mobile app to use the New UI on their mobile device.
- After checking, additional settings for mobile will display. These settings allow you to determine how login credentials should be handled and which types of punches are allowed.

**NOTE:** For mobile users who will also access the application on a desktop, checking Enable Desktop will convert the user's desktop view to the New UI experience.

New UI Preferences Widget - Security Settings

- **Enable Desktop** - For mobile users who will also access the application on a desktop, checking this setting will convert the user's desktop view to the New UI experience. A link to Community is also available when enabling this setting. From this link is useful information to help you understand and use the New UI.
- **Display New Look Toggle** – Checking this item enables a banner in the application that allows users to switch back and forth between the New UI and the Classic UI experience.
- **Enable Mobile** - Checking will allow users who have downloaded and configured the new mobile app to use the New UI on their mobile device and will enable additional settings for mobile.

Login Credentials (Mobile Only)

- **Do Not Save** – This option will not save login credentials and users must enter their username and password with each login.
- **Save Username** – This option will save only the username and passwords must be entered with each login.
- **Save Username and Password** – This option will save both the username and password and users will not need to enter their credentials with each login. When choosing this option, the following warning will display: *Warning: Choosing 'Save Username and Password' could result in a high risk or unauthorized access to sensitive data. Login credentials are stored for 90 days.*
Enable Biometric Authentication – This setting enables both Touch ID and Face ID biometric log in on mobile devices and is supported if Do Not Save or Save Username is selected. This option is not available with the Save Username and Password option. When selecting this option, the following warning message will display: Biometric authentication (Touch ID/Face ID) is not supported with SSO configuration settings and in application offline mode.

Touch ID on Mobile
Once the Enable Touch ID option is enabled, all users assigned to this security profile will then have a Touch ID widget available in their employee accounts, accessed under My Profile. If the user has the ability to edit their own information, an Edit Information link will be available. Users with this ability can turn off/on Touch ID authentication. Turning it off will require them to enter their full credentials and the Touch to Log In option will no longer display on their login screen.

To give users the Edit Information link, edit the security profile under the ESS tab. In the Employee section, set the My Profile Screen to View/Edit.

Users can log in by tapping the Touch to Log In link. No need to enter Username or Password. If the keyboard on the mobile device is in the way, clear it by tapping Done (iPhone), and the Log In screen will display in full. The system will then prompt the user to log in with their fingerprint.

Face ID on Mobile
Mobile users for which biometric authentication has been enabled will be able to individually turn on/off authentication if they would rather login by entering their credentials.
Users can access the Biometrics widget within the New UI of the Mobile experience only. This is not available for the New UI Desktop experience.

After tapping Edit Configuration, users can turn on/off authentication and save. A success message will display upon the completion of verification.

**NOTE:** Face ID is available for iPhone/iOS and users must have facial recognition configured and an image of their face saved on their device. Users can bring up the app login screen and login by glancing at the screen. The Android Operating System only supports FaceID to unlock phones. User who are configured for Biometrics and have FaceID supported on their Android-based device, will be prompted for TouchID.

### Biometrics

| Authentication | Yes |

**Edit Configuration**

![Hooray! Verification Completed](Image)

### Clock

If the New UI Dashboard Layout profile has been assigned to users within the Profiles widget of their employee accounts, and the dashboard has been configured to include the Clock widget, users can see their punch options within that widget.

![Clock](Image)

Please note that the labels and options shown in the Clock widget are controlled from within the user’s Timesheet Profile in the Timesheet Punch Settings widget. Options must be enabled here as well as within the user’s security profile.
The Clock options can also be accessed from a user’s menu under My Time > Clock.

Users without the New UI Dashboard Layout profile assigned can also access the Clock widget within their Timesheet. After opening the timesheet, tap the Clock tab to open the punching options. The same Clock widget from the dashboard will display under this tab.
Security Settings - My Profile

Security settings are available to control whether users can view their own data including Account/Personal Information, Demographics, My Profile Screen data and Employee Contacts and others as configured within Employee Information. Employees can also upload their own personal pictures to their profile.

These settings are located on the user’s ESS tab in the Employee section under Company Settings > Profiles/Policies > Security.

This information can be accessed by the user by tapping their picture or name. Common options include:

- **My Profile Screen** – This setting will allow employees to view their profiles by tapping on their picture or name. Options include View and View/Edit.

- **Account/Personal Information** – This setting will display to employees some of their personal data from their employee account, such as Name, Nickname, Employee ID, Emails, Phones, and Addresses. Options include View, View/Edit, or View/Edit (Custom), which allows you to set special permissions for certain types of personal data. For example, you may want to allow employees to view their Employee ID, but not edit it; however, you may want to allow employees to view and edit their email addresses or phone numbers.

- **Demographics** – This setting will display to employees their demographic data from their employee account. Options include View, View/Edit, or View/Edit (Custom), which allows you to set special permissions for certain types of demographic data.

- **Employee Contacts** - This setting will display to employees their defined contact information from their employee account. Options include View, View/Edit, with additional options to allow them to Add or Delete contacts. After accessing their profile, contacts will display on a separate tab.

Also available under the ESS tab, in the Personal Settings section, are settings to allow employees to change their security question and password and allow them to run saved and scheduled reports.

Security Settings - Cost Centers Widget

Employees can view the Cost Centers widget from their employee account within their My Profile page.

The user’s security profile must be set to allow viewing of Cost Centers. This is done within the security profile under the ESS tab. In the Employee section set the Cost Centers permission to View or View/Edit. If selection View/Edit (Custom), specific cost centers can be set by selecting the Permissions button and then checking the cost centers employees can view.
NOTE: Even if giving users editing rights by selecting the View/Edit permission, the Cost Centers widget will display as Read Only, and editing will not be available.

Security Settings - Base Compensation Widget

Users can view the Base Compensation widget from their employee account within their My Profile page.

The user’s security profile must be set to allow viewing of Base Compensation. This is done within the security profile under the ESS tab. In the Employee section set the Base Compensation permission to View.

NOTE: The Base Compensation widget will display as Read Only.
Security Settings - Managers Widget

Users with the appropriate security settings can view the Managers widget.

The system will display the widgets based upon the assigned security profile of the user. Up to six Manager fields can be shown in the widget based upon the user’s security permissions. If there is no value for a Manager field, the system will not display the associated label. Once the value is set, the label and value will be visible in the widget in Read Only view. Information icons are available, and when clicked, display the permissions granted to the supervisor or manager.

The ability to identify the number of managers used is driven by selections within the Manager Information widget under Company Settings > Global Setup > Company Setup.

The specific managers that will be associated with each employee is set within the Managers widget under My Employees > Employee Information.

The system will display the widget(s) for both Employee Self Service and Manager Self Service scenarios. The security profiles for each employee type must be set as follows under Company Settings > Profiles/Policies > Security.

- For employees to be able to view the widget, the Managers permission on the ESS tab of the Employee section must be set to View, View/Edit, or View/Edit (Custom). When set to View/Edit (Custom), specific manager information can be selected by clicking the Permissions button.

- For managers to be able to view the widget, the Managers permission on the HR tab of the Employee section must be set to View, View/Edit, or View/Edit (Custom). When set to View/Edit (Custom), specific manager information can be selected by clicking the Permissions button.
NOTE: Even if giving users editing rights by selecting the View/Edit permission, the Managers widget will display as Read Only, and the Edit Information link will not be available.

Security Settings - To Do Items, Checklists and Mailbox Notifications
For the New UI, My To Do Items, My Checklists and My Notifications are combined under one icon where users can view their action items.

There are three security options to enable either My Notifications, My To Do Items or My Checklists. These options are available under the ESS tab of a user’s security profile, within the Tools & Documents section. Selecting one, two or all options will make the mailbox icon available.

The delete icon can be controlled by checking or unchecking the My Notifications (Mailbox) (Delete) setting within the user’s security profile. Checking the Delete option will make the icon and delete functionality available. Unchecking the setting will remove the icon and the delete functionality. This setting works independently of the Mailbox/Delete option under the Modules tab of the security profile.

After the user taps the bell icon, the three tabs will display under separate tabs, and action can then be taken by the user. Any email stemming from a notification (Company Settings > Global Setup > Notifications) will send the notification here. Scheduler notifications will also be displayed here.

Team Security Settings
Manager menus will include the Team tab, where they can access their employee timesheets and other data.

- Team > My Team

For managers to have the Team > My Team menus, they must have View or View/Edit access to Employee Information (My Team) under the HR tab of their security profile. If access is not granted, the employees assigned to them will not be available. If giving View/Edit access, when the manager accesses their employee’s profile, editing will be available. If giving View access, managers can view the profiles, but not edit the information.
Scheduler Security Settings
For companies with the Scheduler module enabled, there are some specific security settings that can be enabled for employees, as shown below.

Schedule Shift Swaps/Open Shifts/Request for Coverage
To enable employees to request and process shift swaps, request a shift for open shifts that have not been filled, or request coverage for a shift they are scheduled to work, settings must be enabled in the user’s security profile. These settings are located under the ESS tab of a user’s security profile, within the Schedule Changes.

Scheduler Delegation
Employees who are responsible for maintaining schedules in the Scheduler module can be set within their security profile, so they can view and/or edit delegates in their employee profile. Options to view, edit, add, and delete a delegate are available.

Skills
A setting in the Employee section on the ESS tab in the security profiles permits users View-only access to their own skills as a part of their employee profile.

Scheduled Cost Centers
A setting in the Employee section on the ESS tab in the security profiles permits users view-only access to their own scheduled cost centers as a part of their employee profile.

Payroll Security Settings
Pay History
A Pay Statement History security setting is available to enable employees to view their Pay History. The setting is located in the ESS tab of a user’s security profile, within the Payroll section. The Export PST to PDF setting will give users the ability to download their pay statements to PDF, where they can then save and/or print the statement.
Pay Information Widget Settings
Employees can view their pay grade and employee type data from the Pay Information widget in read-only format. The Pay Grade and Employee Type security settings can be enabled in security profiles to allow employees this ability. If these fields are also used in custom forms, employees can view the information there as well.

The settings are located under the ESS tab in the Employee section. The Account/Personal Information setting must be set to View/Edit (Custom), and the Permissions button selected.

TLM Security Settings

Time Tracking Security Options – Timesheets, Time Off, Schedules
For all users who will have access to their own personal timesheets, as well as certain editing rights, the security settings for these functions are located under the ESS tab of the security profile in the Time Tracking section. This section contains settings for overtime requests, time off requests, viewing accruals balances, and viewing schedules.

- **Access Personal Timesheets** – This option will give users access to their timesheet. This will activate the View Timesheet link from the Clock widget of the Home page, and from the main menu under the hamburger icon, will activate the Timesheet option under the My Time menu. This option also drives the visibility of the Time Statistics and Timesheet Chart widgets, as well as the Clock page and the ability to punch in/out or change cost centers in the clock widget. These widgets are part of the New UI Dashboard.

- **Approve Personal Timesheets** – This option will allow users to approve timesheets that have been processed through a Timesheet workflow, resulting in an approval To Do Item. Users will receive a To Do Item if employee is included on the Approve Step of the workflow. If this option is unchecked, but a workflow is active, and configured to be received by an employee, a To Do Item will still be generated, but due to this option being unchecked/disabled, the system will not display Approve or Reject buttons for the To Do Item.

- **Close Open Absences** – Not Supported in Mobile.
- **Create Open Absences** – Not Supported in Mobile. The *My Leave Requests* setting under the ESS tab in the *Tools & Documents* section is responsible for both *Request* and *History* tabs under *My Time > My Time > Leave*.

- **Request Overtime** – This option will allow users to create and submit an Overtime Request under *My Time > Overtime > Request* and drives *My Time > Overtime > History*.

- **Request Time Off** – This option will allow users to create and submit a time off request under *My Time > Time Off > Request*, or anywhere in the application where the time off request link is available. This setting also drives *My Time > Time Off > History*.

  - **Modify Request** – Not supported in Mobile.

- **Request Timesheet Changes** – See Timesheet Change Requests* description below

- **View Accruals History** – Not Supported in Mobile. The *Balances* tab under *My Time > My Time > Time Off > Balances* is set with the *Accruals / View* setting in the *Employee* section of the ESS tab.

- **View Open Absences** – View access only. See *Create Open Absences* setting above for explanation.

- **View Personal Schedule** – For employees assigned a schedule, this option will allow them to view their schedules under *My Time > Schedule*, or anywhere in the application where the *Schedule* option displays. If this option is disabled (unchecked), the *My Schedule > My Schedule > Schedule* option on the main menu will no longer be available. Shifts rendering in the timesheet are controlled by the timesheet profile configuration. Shifts rendering on time off cards are controlled by the *View Personal Schedule* or *View Employee Schedules* settings, located in the *Schedule* section of the *Modules* tab.

  - **View Personal Time Off Calendar** – Not supported in Mobile.

  - **View Personal Timesheet Audit** – Not supported in Mobile.

  - **View Personal Timesheet Correction History** – Not supported in Mobile.

  - **View Points History** – Allows users to view their points.

**Timesheet Change Requests***

To allow users to request timesheet changes, the *Request Timesheet Changes* permission must be granted in the user’s security profile. This is in the *Time Tracking* widget under the ESS tab of the security profile.

Additionally, the Timesheet Profile must be enabled with the type of change requests an employee can perform. This is done within the *Change Requests Employee Can Perform* widget of the profile. We currently support *Add Punch In, Add Punch Out, Modify Punch In, Modify Punch Out, Add Time Entry*, and *Modify Cost Center*.
Mobile Punch Settings

Companies can restrict or allow specific mobile punching options for users of the New UI. These settings are found in the Mobile Punch Settings section of the New UI Preferences widget in security profiles. See New UI Preferences Widget - Security Settings section above for more details.

Manager Attendance Board/Attendance Indicators

A Show Attendance On My Team security setting is available to enable the New UI view of manager attendance boards. The setting is located in the TLM tab of a user’s security profile, within the Time Tracking.

The attendance indicators can be viewed by the manager under Team > My Team > Team Members. The punches in green with an arrow pointing down, indicate the employee has punched in. The punches shown in gray with an arrow pointing up, indicate the employee has punched out.
Time Off Security Settings
Multiple options for managers to view and approve their employee’s time off requests are available under the Team > Time > Time Off menu structure. Availability of these options are dependent on the manager’s security permissions, which are set on the TLM tab of security profiles in the Time Editing/Approving Functionality section (shown below). The options available are:

- Team > Time > Time Off > Pending Approval
- Team > Time > Time Off > Request
- Team > Time > Time Off > History
- Team > Time > Time Off > Balances
- Team > Time > Time Off > Time Off Calendar
- Team > Time > Time Off > Open Absences

Security Permissions for Manager Time Off Requests
Time Off Request options for managers to handle their employee’s time off requests are set under the TLM tab, in the Time Editing/Approving Functionality section of their security profile.

- **Approve** – Gives managers approval ability of time off requests.
- **Request On Employee Behalf** – Allows managers to request time off for their employees. This option is accessed under Team > Time > Time Off > Request. Select an employee and complete the request.
- **View/Edit/Approve All** – Allows access for displaying, editing and approving the TOR cards under the History menu item under Team > Time > Time Off > History, or under the Pending Approval menu.
- **Available Views: Pending Approval** – This setting will enable the Pending Approval menu option under Team > Time > Time Off.
- **Available Views: Time Off Calendar** - This setting will enable the Time Off Calendar menu option under Team > Time > Time Off.
- **Balances** - The Balances option is set under the Modules tab of the security profile, in the Accruals section. Check to enable the View Employee Balances setting.
• **Time Off Calendar** – The Time Off Calendar options are set under the *TLM* tab of the security profile, in the *Time Off Planning Calendar Details* section.

• **Open Absences** – Open absences management options are set under the *TLM* tab of the security profile, in the *Open Absence Management* section.

### Timesheets – Pending Approval

Timesheets of employees who have submitted their timesheets for manager approval will be available under the *Pending Approval* menu.

- **Team > Time > Timesheet > Pending Approval**
- **Team > Time > Timesheet > All Timesheets**
- **Team > Time > Timesheet > Change Requests**

For managers to have the *Pending Approval* option for timesheets, the *Awaiting My Approval (Pending Approvals)* security setting will need to be enabled in the manager’s security profile. This is located under the *TLM* tab, in the *Time Editing/Approving Functionality* section of their security profile.

When a manager receives a submitted timesheet and goes to review and process the timesheet under **Team > Time > Timesheet > Pending Approval**, multiple options will be available from the *Actions* icon. These settings are controlled from the user’s security profile.

The settings in the *Timesheets* area of the *Time Editing/Approving Functionality* section of the *TLM* tab will control the options available to the manager.
Timesheets

- **View/Edit** – This option will enable/disable the *Timesheet* option from the *Actions* icon under the *Pending Approval* tab under *Team > Time > Timesheet > Pending Approval* or as accessed under *Team > Time > Time Off > Pending Approval > Timesheet tab*.

- **Approve** – This option will enable/disable the *Approve* and *Reject* options from the *Actions* icon under the *Pending Approval* tab under *Team > Time > Timesheet > Pending Approval* or as accessed under *Team > Time > Time Off > Pending Approval > Timesheet tab*.

Timesheets – Corrections

When timesheets have been processed through the Pay Prep process and are in a locked state, managers can be given security permission to correct locked timesheets. This is done under the *TLM* tab of their security profile, within the *Time Editing/Approving Functionality* section.

- **Correct Timesheet** – This option will enable the *Correct* button within an employee's locked timesheet and allow the manager to click the *Correct* button, edit the timesheet, and then approve the timesheet after the correction.
HR Security Settings

Position Hierarchy Chart
For companies with Position Management enabled and in use, an option is available to restrict viewing of the Position Hierarchy chart. On the HR tab, the Position Hierarchy Chart option must be set to enable users with this Security Profile to view the position hierarchy chart. Currently, All Company Positions is the only available option.

<table>
<thead>
<tr>
<th>POSITION MANAGEMENT</th>
<th>Permission</th>
<th>Add</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Settings</td>
<td>View/Edit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Positions</td>
<td>View/Edit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Assignments</td>
<td>View/Assign Employees to Subordinate Positions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Hierarchy Chart</td>
<td>All Company Positions</td>
<td>(Assign Employees to ANY Position)</td>
<td></td>
</tr>
</tbody>
</table>

Benefit Plans
Security settings are available to enable users to view their benefit plans, delete unsubmitted open enrollments, access questionnaires, request changes, and delete benefit plans from their profiles.

- **View Selected Benefits** – When checked, this setting will display the My Benefits menu option, along with the Benefit Plans sub-menu. A Benefits Profile needs to be set on the employees record under Employee Information.
- **Request Changes** – When checked, this setting allows users to access an option to request enrollment, such as Open Enrollment, New Hire, Life Change, etc.
- **Edit Beneficiaries Between Enrollment Periods** – Allows users to change beneficiaries when enrollment period is inactive.
- **Benefit Questionnaires** – When checked, this setting allows users access to benefit questionnaires that may be attached to their enrollment.
- **View in My Profile** – When checked, will allow users to view their benefits in their profile.
- **Delete from My Profile** – When checked, users will be able to delete enrollments they have started but haven’t submitted, under the Enrollment tab of Benefit Plans from their My Benefits > Benefit Plans view.

HR Checklists
Employees must be granted permission to view or complete checklist items within their security profiles on the ESS tab of their security profiles.

<table>
<thead>
<tr>
<th>Checklists</th>
<th>View</th>
<th>(Complete Steps)</th>
</tr>
</thead>
</table>

Items within HR Checklists
Employees must be granted permission to view or access Custom Forms, Benefit Enrollment, Direct Deposit, and HR Action items within their checklists. This is set within the ESS or HR tab of their security profile. To enable the HR Checklist Items available in the New UI, permission must be granted using the Classic UI as listed below.

- **For Custom Forms**: ESS Tab, My Custom Forms Items section <Choose a Custom Form> = View
- **For Benefit Enrollment**: ESS Tab, Benefits section - View Selected Benefits and Request Changes (both selected)
- **For Direct Deposit**: ESS Tab, Employee section - Direct Deposits = View
• For HR Actions: ESS Tab, Employee section – HR Action Request = View

• For HR Actions: ESS Tab, HR Actions section - My Information Action Request = Initiate
  • For HR Actions: HR Tab, HR Actions section - My Employee = Initiate (both Initiate flags should be set within the ESS and HR tabs)

Custom Forms - Managers Settings in Employee Security Widget
Users with the Managers setting enabled in their security profiles can view or edit Manager fields in custom forms in the New UI. Without minimal View permission, users will not be able to complete a custom form that contains a Manager field. The field can be enabled for managers on the HR tab and for employees on the ESS tab.

Dashboards Security Settings
Default settings for module dashboards can be set under the Dashboards tab of security profiles. In Employee and Applicant profiles, the dashboards are disabled by default. For any other security profiles, the default is On. Security profiles with items intended for use by managers will have the module dashboards enabled by default.

Unchecking an item will remove that module’s Dashboard menu item from the user’s menu. An option to allow users to share their dashboard charts is also available. Users will have a share option under the dashboard chart action menu.

Common Security Settings
The table below displays a summary view of common security settings that are supported for the New UI along with their location in the system. The security profiles are located under Company Settings > Profiles/Policies > Security.

<table>
<thead>
<tr>
<th>Function</th>
<th>Security Setting</th>
<th>Security Setting Location</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>For All Users</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Profiles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For My Profile after user taps picture/name</td>
<td>My Profile Screen</td>
<td>ESS tab, in the Employee section</td>
<td>View or View/Edit</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
<td>Tab</td>
<td>Security Settings</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account / Personal Information</td>
<td></td>
<td>ESS tab, in the Employee section</td>
<td>View or View/Edit or View/Edit (Custom)</td>
</tr>
<tr>
<td>Demographics</td>
<td></td>
<td>ESS tab, in the Employee section</td>
<td>View or View/Edit or View/Edit (Custom)</td>
</tr>
<tr>
<td>Employee Contacts</td>
<td></td>
<td>ESS tab, in the Employee section</td>
<td>View or View/Edit</td>
</tr>
<tr>
<td>My To Do’s &amp; Notifications</td>
<td>My To Do (Mailbox)</td>
<td>ESS tab, in the Tools &amp; Documents section</td>
<td>Check to enable</td>
</tr>
<tr>
<td>Scheduler Notifications</td>
<td>Scheduler Notification Preferences</td>
<td>ESS tab, in the Employee section</td>
<td>View or View/Edit</td>
</tr>
<tr>
<td>Scheduler Shift Swaps</td>
<td>Request Shift Swap</td>
<td>ESS tab, in Schedule Changes section</td>
<td>Check to enable</td>
</tr>
<tr>
<td>My Pay</td>
<td>My Info &gt; My Pay &gt; Pay History</td>
<td>ESS tab, in the Payroll section</td>
<td>Check to enable</td>
</tr>
<tr>
<td>My Pay</td>
<td>My Info &gt; My Pay &gt; Direct Deposit</td>
<td>ESS tab, in the Employee section</td>
<td>View, or View/Edit. Additional options include Add, Delete and Reserve Live Checks</td>
</tr>
<tr>
<td>Timesheets</td>
<td>Access Personal Timesheets</td>
<td>ESS tab, in the Time Tracking section (all listed security settings)</td>
<td>Check to enable</td>
</tr>
</tbody>
</table>
Timesheet menu option under My Time menu) for Timesheets are under this tab/section

Approve Personal Timesheets (enables Approve/Reject in To Do Items when timesheet is processed via workflow)

Request Overtime (enables Overtime menu option under My Time menu)

Request Time Off (enables Time Off menu option under My Time menu)

View Personal Schedule (enables Schedule menu option under My Time menu)
**Benefits**  
*My Info > My Benefits*

- **View Selected Benefits**  
  (for the My Benefits option)

- **Request Changes**  
  (for employees to request enrollment changes)

- **Benefit Questionnaires**  
  (for employees to access attached questionnaires on their enrollments)

- **View in My Profile**  
  (to view benefit plans in employee account)

- **Delete from My Profile**  
  (for users to delete enrollments from their employee accounts)

**For Managers Only**

**New Attendance Board/Attendance Indicator**

- **Show Attendance On My Team**  
  (ESS tab, in Benefits section, all listed security settings for Timesheets are under this tab/section)

**Teams**  
*My Team > My Team Members*

- **Employee Information (My Team)** – (will enable team members to display)

**Time Off** (for employees on Team) – available from menu paths:

- **Team > Time > Time Off > Pending Approval**
- **Team > Time > Time Off > Request on Employee Behalf**
- **Team > Time > Time Off > History**
- **Team > Time > Time Off > Balances**

- **Pending Approval**  
  (will enable the display, edit and approval of the TOR cards under the History or Pending Approval menu options)

- **Request On Employee Behalf**

- **View/Edit/Approve All**

**Check to enable**

**TLM tab, in the Time Tracking section**

**HR tab, in the Employee section**

**Set to View or View/Edit**

**Check to enable**

**TLM tab, in the Time Editing/Approving Functionality section, under Time Off Requests**
**View Employee Balances**  
(will enable the **Balances** menu option)  

**Modules** tab, in the  
**Accruals** section

### Time Off Calendar

**Team > Time > Time Off > Time Off Calendar**

**Time Off Requests** >  
Available Views – Time Off Calendar (will enable the **Time Off Calendar** menu option)  

**TLM** tab, in the Time Editing/Approving Functionality section, under **Time Off Requests**  

Check to enable

### Timesheets (for approving employee timesheets)

**Team > Time > Timesheet Pending Approval menu**

**Timesheets** > Available Views:  
Awaiting My Approval (will enable the **Pending Approvals** menu item)  

**TLM** tab, in the Time Editing/Approving Functionality section  

Check to enable

**Timesheets: View/Edit**  
(will make timesheets available under Pending Approval option)  

**Timesheets: Approve**  
(will give manager Approve/Reject under Pending Approval option)  

**Correct Timesheet** (will enable the **Correct** button in locked timesheets)

**Employee Information** (My Team) – (will make the **Profile** option available under Pending Approval option)  

**HR** tab, in the **Employee** section  

Set to View or View/Edit
Other Configuration Options

HR Open Enrollment and the New UI
Listed below are HR options for Open Enrollment pertaining to the New UI.

Non-Simple Open Enrollment
Within the New UI, the user’s view for non-simple enrollments during open enrollment is different than the user’s view of simple enrollments.

What is Non-Simple Enrollment?
Non-Simple enrollment is defined by the *Simple Enrollment Settings* checkbox on the Benefit Profile. If checked, it is a simple enrollment; if unchecked, it is a non-simple enrollment.

- When unchecked, or non-simple, it allows for the Open Enrollment to be set up per Benefit Group; i.e., Medical Group, Dental Group, etc.
- Also, within the Benefit Profile, there is an option named *Allow Grouping For A Non-Simple Enrollment* that becomes available when the *Simple Enrollment Settings* checkbox is unchecked. This setting will combine all groups using the same enrollment dates.

Non-Simple Enrollment in the New UI
If the *Simple Enrollment Settings* on the Benefit Profile is unchecked and different enrollment dates are added per group, the following can be expected in the New UI:

- There will be different sections for each Open Enrollment.
- If the *Allow Grouping For A Non-Simple Enrollment* option in the Benefit Profile is checked, all groups with the same enrollment dates will be represented in the same section for Open Enrollment.
- The sections for each Open Enrollment will display the dates of each, as well as the name of the group, to identify which enrollment group(s) the section represents.
- The sections will only be displayed if the enrollment period is active.
Example: New UI – My Info > My Benefits > Enrollment

The example below is shown in the New UI, with a .home login. From the mobile device, the sections would be stacked vertically.

Example: New UI – Benefits Widget on Home Page
Cost Center Locations and GeoFencing

When geofencing is enabled, the rules to determine if a punch is within the configured radius are as follows.

The address of the Scheduled Cost Center will be used to determine the punch location, if available. If there is no Scheduled Cost Center, the employee’s default Cost Center will be used.

If there are multiple cost centers associated with the punch, the cost center with the highest priority is used. Cost Center priorities are defined in the Cost Center trees, in the Cost Center Trees widget, under Company Settings > Global Setup. The Cost Center Trees widget can be added to any tab, using Edit Tabs.

If the address associated with a Cost Center is empty or incomplete, the system uses the Cost Center at the next level up until the address is resolved. If the address cannot be resolved from the Cost Center tree, the “Invalid employee location is provided” error message is displayed.
Under the Favorites menu, users with the proper permissions can define their own favorites via the Start Widget Configuration page. Once configured, the Start widget will display at the top of their Home page and contain all the user’s favorite menu items. This section explains how to define Favorites at the company level, at the employee level and the security and settings that must be in place to make this menu active.
Favorites

The Favorites menu is accessed under the Star icon in the hamburger menu. The Configure Favorites option allows users with the proper security permission to add their own list of favorite menu items and configure their Start widget. These favorites are linked to the Start widget on the New UI Dashboard Layout on the employee’s home page. If they are configured under the Favorites menu or from the Start widget, the options will display in both places.

Favorites in the Start widget can be configured by administrators or by individual users. If administrators configure the favorites the layout can be applied to multiple users in the company via security profiles. Permission can be granted at the security profile level allowing users to configure their own favorites, or to edit the favorites assigned to them.

Start Widget in New UI Dashboard Layout Profile

For users to be able to see their configured Start widget on their home page, the Start widget should be included in the affected New UI Dashboard Layout profiles. This is done under Company Settings > Profiles/Policies > New UI Dashboard Layout.

If the Start widget is not already added to your profiles, drag it from the Available Windows area to Column #1. While the widgets can be dragged into the order you would like them to appear, the Start widget will always appear at the top of the user’s home page regardless of where it is placed in the list.
## Favorites Security

### Start Widget
In each security profile, the Default Start Widget section is available on the main page. From this widget you can set a default start widget for every user assigned to that profile.

<table>
<thead>
<tr>
<th>SCREEN</th>
<th>DEFAULT LAYOUT</th>
<th>CAN USER MODIFY</th>
<th>ADD/EDIT AVAILABLE</th>
<th>RESET LAYOUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Widget</td>
<td>Manager Start Wic</td>
<td>✗</td>
<td>✓</td>
<td>[Reset]</td>
</tr>
</tbody>
</table>

- **Default Layout** – Select a default layout from the drop-down.
- **Can User Modify** – Check if users assigned to this security profile will be allowed to edit their own Start widget.
- **Add/Edit Available** – Click the icon to be taken to the configuration page where you can create default layouts for the Start widget. Items created here will be available in the Default Layout drop-down.
- **Reset Layout** – Clicking the link will reset the view for all users assigned to this security profile. A confirmation message will display before the reset. Caution should be exercised when using this option. For example, if users have the right to edit their own Favorites in their Start widget and they set their widget to their liking, if you use the Reset option here, their configuration will be replaced with the layout listed here.

### Allowed Windows in Dashboard
To ensure employees assigned to the security profile has access to the Start widget, the Start checkbox should be enabled within the **Dashboard: Allowed Windows** section on the ESS tab in the security profile. You can enable all windows or select **Custom** to specify windows.

### Activating Favorites Menu
In the Menu section under the ESS tab of security profiles, the Show Start Button setting, when checked, will activate the Favorites menu for employees.
Configuring a Start Widget

From the Default Start Widget of a security profile, click the Add/Edit Available icon to access the configuration page and add or edit the Start Widgets.

**NOTE**: If users configure their own Start widgets, the configuration shown here applies to them as well.

If the Start widget is not configured (i.e. does not include at least one link in any category), the message *Please configure your Start Widget to view content* displays.

Users can have up to 10 categories and 10 links per category.

- Users can not view links to reports/screens that they do not have View permissions to access or where access has been disabled entirely in their assigned security profile.

- The number of category shapes that appear is based on resolution. If the resolution allows all 10 icons to appear at once, all of them display. Fewer category icons appear as the browser window/resolution is decreased in the desktop or mobile browsers.

- If no links in a category are available, the category is not shown. Users can not view categories in the widget that contain no links or links added to the category that are labeled as *Not Available*.

Each category can be customized with a color, icon, or photo/image. By default, the *Select Icon* option displays the people/magnifying icon unless the user selects another icon from the lookup.

<table>
<thead>
<tr>
<th>Name</th>
<th>HR Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categories</td>
<td>5</td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TODO</strong></td>
<td></td>
</tr>
<tr>
<td>Category Color (New UI only)*</td>
<td>#452</td>
</tr>
<tr>
<td>Category Image*</td>
<td>Icon (New UI Only)</td>
</tr>
<tr>
<td>Remove Photo</td>
<td></td>
</tr>
</tbody>
</table>

- **Name** – Enter a name for the widget. If you are an Admin creating a widget for a security profile, you might consider naming it after the security profile. Individuals can name it something meaningful to them.

- **Categories** – Up to 10 categories can be activated per widget.
  - Once the categories have been selected, they will load below in expanded view.
  - Each Category should be named and then saved to activate the Photo option. Once saved, you can minimize (maximize) each category with the icon next to the category name. This can save space and scrolling.

- **Category Color (New UI Only)** – The system will assign each category a color by default. You can select an alternate color. There are 10 colors available.
- **Category Image** – Select from Icon or Photo.
  - **Icon (New UI Only)** – A pop-up with a set of system icons will display. Select the desired icon.
  - **Photo** – Click the *Add Photo* icon and select a photo stored on your computer. If you are unhappy with your selection, you can click *Remove Photo* and select again.

- **Set As External Link** – This option allows you to enter the criteria for a link to an external web address. Enter the name and full web address.

- **Set As Internal Link** – This option will pop up a search window where you can enter keywords and all menu items fitting that criteria will display in a list. Select from the list.
  - For both internal and external links, the *Label* column will allow you to customize the name of the menu item.
My Info Menu

The mobile user experience contains options that can be enabled for all users, whether an employee or a manager. These are items that fall under the My Info menu (the single employee icon). These are options that affect the individual user, or are options granted to the individual, such as a user’s timesheet, schedule, benefits, direct deposits, pay, and more.

This section discusses the user’s experience when those options have been enabled and may include sub-systems your company may not have enabled. Not all options shown will be available to you depending on your permissions. In some cases, additional information is provided for certain functions.

From the hamburger menu, the default view for the user will be the My Info options.
My Information

Under the My Information menu are options to access your profile, your contacts and set your notification preferences (if authorized.)

- **My Profile** – Under your profile, you can view your account information, and if authorized, edit certain types of information. Options under here can include your basic information within the Employee Information widget, Touch ID authentication, Account Demographics, Account Information (name, locale, time zone, username, nickname, security question), Cost Centers (your default cost centers), Base Compensation, Managers (your manager(s)), Dates (hired, re-hired, seniority, start date, Skills, Scheduled Cost Centers (for use with the Scheduler module) and options to Change Password and Change Security Question.

- **Contacts** – Under this menu you can access and/or add contacts that are stored within your employee account. These contacts are listed as your Emergency, Dependent, and Beneficiary contacts.

- **Notification Preferences** – Under this menu, if authorized, you can set how you wish to receive To Do Items and other system-generated emails. You can select to receive notifications in your Mailbox (accessed by tapping the envelope icon), or to receive these notifications under your primary email account. Options are also available to set if you wish to be notified of certain types of schedule changes within the Scheduler module.
My Time

Under the menu, you can access your timesheet, request and manage time off requests, view schedules, request and manage overtime requests, and more. Remember that your options may vary from the examples depending how your company is configured.
Timesheet Menu
The Timesheet menu contains options for an employee to view/edit their own current timesheet, historical timesheets, and if authorized, create and submit a timesheet change request.

Timesheet
The Timesheet view has multiple options to view and edit your timesheet. When first opening the timesheet, the current day will be highlighted as the active day, which allows you to enter From/To times for that highlighted day.

To view the tabs associated with the timesheet, click the timesheet down-arrow to view and access the configured tabs. After selecting one of the options, you can click the down-arrow again to select another tab.
To edit any other day, tap to open that day and it will be added to the current day for editing. Tap the Add Time Entry link and another time entry field will be added to that date.

When adding a time entry, the current date and time will automatically populate, but it can be edited. Additional details such as cost centers, shift premium, and other data can be added to the entry. After creating the entry, swipe down and the other dates will display, where they can also be tapped and edited. The cost centers can be selected by tapping the down-arrow for that field and then using the selector.

The conversation bubble icon will allow for Daily Notes to be added to the time entry.

The trash can icon will allow you to delete the entry and a confirmation will display before deleting.

After editing is completed, you can save your timesheet by scrolling the bottom and tapping Save. A success message will display.
Timesheet Exceptions in Time Entry and Calc Detail Pages

If using exceptions, the total count of exceptions per time entry in a pay period, will display in the list of time entries for both the Calc Detail and Time Entry screens. Tapping on the exception icon will expand the entry and display the details of the exception(s) for the Calc Detail screen; and for the Time Entry screen, editing options are possible.

**Calc Detail**

**Time Entry**
Locked and Unlocked Timesheet Status
To assist managers in quickly identifying the status of their or their employees’ timesheet status, a lock icon and text will display to indicate the status of the timesheet. The status will display on each screen within a timesheet, i.e., Time Entry, Calc Detail, etc.

The possible statuses are shown in the key below. These statuses will display for both employees and managers.
Uploading Documents to Timesheets

Within a timesheet, there are two icons available; the Paperclip icon to upload documents and files.

After tapping the Paperclip icon, the page will scroll down to the bottom, where an Upload link can be tapped to open the uploading page. Tapping Choose will allow you to choose or take a photo/video, choose an existing photo, or browse to other areas on your device where documents can be selected.

After selecting an attachment, you will receive a success message and the attachment file will display at the bottom of the Timesheet page. After saving the timesheet, the attachment will display with a number in parentheses, indicating how many attachments have been added to the Timesheet.
Time Punch GeoFencing
Geofencing is supported and provides a way to control punches from outside of a configured radius. If configured, when you register a punch outside the restricted zone, you will receive an error message.

Historical Timesheets
Under the Timesheet menu is the Historical Timesheets menu which displays a list, in read-only format, of an employee’s timesheets and their statuses (Open, Approved, etc.)
Change Requests

Users can request timesheet changes through the **Change Request** button, if authorized within their security profiles. The button can be accessed from the **Actions** icon in the timesheet.

After an employee submits a Timesheet Change Request, managers will receive To Do Items where they can view the details of the request and approve or reject it.
Time Off
The Time Off menu contains options to create a request, view time off history, view time off balances and view open absences created by managers or administrators.

Request
To create a request, select from one of the menu paths listed above. Enter the Time off type, Request type, and if required, a Comment. The Request type will determine the additional fields that display. For example, if selecting Multiple Days, the From/To date fields and Hours per Day field will display. Each type will display the required fields for the type chosen.

Click Submit Request when done. After the submission, a success message will display. After clicking OK, the Request page will display where another request can be made. If no further requests are needed, you can return to the main menu by clicking the hamburger icon, or if you would like to view the history of your requests, click the Request chevron icon and select History or select Balances to view your accrual balances (these options are shown next).

History
From the Time Off History page, you can view request history for the Past Year, Next Year, Next 3 months, or Past 3 months. From this page, you can view comments, or delete the request by tapping the trash can icon. When attempting to delete a request, you will receive a confirmation to cancel or continue.

Once done viewing history, you can return to the main menu by clicking the hamburger icon, or if you would like to view your accrual balances, click the History chevron icon and select Balances.
<table>
<thead>
<tr>
<th>VACATION</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Dec 1, 2020</td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td>8.00 hours</td>
<td></td>
</tr>
<tr>
<td>Submitted On</td>
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<tr>
<td>Status</td>
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<table>
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<tr>
<th>PTO</th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Feb 16 - Feb 17, 2020</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>6:00 pm - 6:00 am</td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td>12.00 hours</td>
<td></td>
</tr>
<tr>
<td>Submitted On</td>
<td>Jan 3, 2020</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
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</table>

<table>
<thead>
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<th>VACATION</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Feb 9, 2020</td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td>14.00 hours</td>
<td></td>
</tr>
<tr>
<td>Submitted On</td>
<td>Jan 5, 2020</td>
<td></td>
</tr>
<tr>
<td>Status</td>
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<td></td>
</tr>
</tbody>
</table>
Balances
From the Balances page, you have the option of viewing your balances in days or hours. Having this option will depend how your company has configured your accruals. Each set of balances contains a Request link and when tapped, will open a new time off request. Once done viewing balances, you can return to the main menu by clicking the hamburger icon and re-selecting an option.

Open Absences
If a manager or administrator has created an open absence for an employee, the employee can view the entry in read-only report page from the Open Absences menu.
Accrual History

If a manager or administrator has created an open absence for an employee, the employee can view the entry in read-only report page from the Accruals History menu.
Overtime
If configured, you may be able to request overtime. This can be accessed from Main menu > My Time > Overtime, or from within the tabs at the top of the My Time menu. When accessing this option, the request page will open where new requests can be made.

Request
Fill in all the required fields and submit the request. Once submitted, you can click the Request chevron icon to view overtime request History.

History
From the History page, you can view requests for Next year, Past year, Next 3 months, or Past 3 months. With each request, you can view comments, or delete the request, if authorized. When finished, you can select another menu item, or navigate back to the Main menu by clicking the hamburger icon.
Leave
Absence requests will only display if your company is using the Leave module and has it activated to display on your device. If you are already familiar with creating leave requests from the web application, the process in the Mobile App is much the same. This can be accessed from Main menu > My Time > Absence, or from within the tabs at the top of the My Time menu. When accessing this option, the request page will open where new requests can be made.

Under the Forms menu, commonly used WH-38X forms are available and employees can view their forms from this menu.

Request
Fill in all the required fields and submit the request. Once submitted, you can click the Request chevron icon to view absence request History.
History

From the History page, you can view requests for Next year, Past year, Next 3 months, or Past 3 months. With each request, you can view comments, or delete the request, if authorized. When finished, you can select another menu item, or navigate back to the Main menu by clicking the hamburger icon.
My Schedule

The My Schedule menu contains options for basic scheduling and advanced scheduler.

Schedule
Schedule information can be accessed from the following areas: Main menu > My Schedule > Schedule, or from Main menu > My Time > Schedule, or from the Schedule tab within a Timesheet. The month/year can be adjusted forward/backward with the date arrows. The current day will be highlighted. Details of each scheduled day can be viewed below the calendar.

Visual indicators/icons display on the calendar available to employees so that the employees know when there is:

- Time Off
- Holidays
- Scheduled shift(s)
• Posted shift(s)
• Open shift(s)

Scheduler Module: Requesting a Shift Swap

If your company has the Scheduler module sub-system enabled, you may have the ability to swap shifts with another employee, if configured in your company. The examples below show the process.

From your schedule, scroll down in the list of scheduled shifts below the calendar. Shifts eligible for swapping will contain the swap icon. Tap the icon for the shift you wish to swap with another employee.

![Scheduler Module Interface]

After tapping the swap icon, the swap request page will display. You can tap the Details link to view elements making up the shift to be swapped. Employees qualified to work the shift, along with the shift they are scheduled to work that day will display under the date. Tap the checkbox next to the desired employee to select that person for the request. Click Submit.
After submitting the request, a success message will display. For the requestor, their schedule will update to show that a shift swap is pending.
Scheduler Module: Accepting or Rejecting a Shift Swap Request

For employees receiving a shift swap request, they will have the option to accept or decline the request. The request will be sent to the user’s mailbox, where an email about the request will be under the My Notifications tab and the request itself will be under the My To Do Items tab.

Under the My Notifications tab, the swap request can be opened and read. Tapping OK will remove the notification from the Unread list. Tapping Close Unread, will preserve the notification in the list. Filters can be applied to filter the list by Read or Unread.

Under the My To Do Items tab, action can be taken on the swap request. Recipients will select the shift, and can then accept it by tapping Accept, or reject it by tapping Decline.
When a recipient has accepted or declined a request, depending how the workflow is configured, the request can go to a manager for approval or rejection. Once the manager approves or rejects the request, email notifications are typically sent the requestor. The notifications can be viewed from the recipient's Mailbox under the Notifications tab. After the manager approves a request, the requestor and recipient's schedules are automatically updated.

**Notification Preferences**

Employees can specify the way they want to receive Scheduler Notifications in their mobile devices under *My Information > Notification Preferences*. Users can select the types of notifications they would like to receive and the delivery method for those notifications. If email is selected, notifications will be sent to the employee's primary email address as configured in the system.
Scheduler Module: To Do Options for Coverage and Schedule Change Requests

Employees can accept or reject coverage requests and scheduled change requests from their mobile devices. Shift-related requests appear on the My To Do Items tab after tapping the notifications icon. After selecting an individual shift, employees will see details of the request and have the option to accept or reject the request. A confirmation is presented to finalize the choice. After tapping Decline or Accept, additional confirmation is required to complete the action.

When schedule change requests for shift assignment, drops or modifications are sent through a workflow requiring employee approval, an Accept Scheduled Change Request notification will appear in the employee's notifications. Depending on the operation, the details of the To Do item may vary. For newly assigned shifts and dropped shifts, the details of the shift, including time, employee, skill and scheduled cost center are displayed. For modified shifts, both the original shift details and the modified details are shown.
After approving or rejecting the request, additional confirmation is required.

**Scheduler Module: Adding, Dropping or Requesting Open Shifts (Non-Workflow)**

Employees can add or drop open shifts using their mobile devices. The *Manage Open Shifts* option in the schedule configuration must be set to enable the features. When the *Add/Drop* option is selected, employees can add open shifts or drop assigned shifts independently of any workflows or additional approval.

After the configuration is completed, employees have the option of adding shifts when viewing their schedules and tapping the pencil icon for a given day. To add the shift, employees select a shift and press *Submit*. Once added, a *Trash Can* icon will appear the next time the shift details are viewed, which can be tapped to drop the shift, if necessary.

**Scheduler Module: Requesting Open Shift (Workflow)**

Employees can request assignments to open shifts that require manager approval from posted schedules. The employee’s open shift request will initiate a workflow that will assign the shift to the employee after the approval steps are completed.

**NOTE:** To enable this feature, the schedule must be configured with the *Manage Open Shifts* option set to *Post Open Shifts*.

To request open shifts, employees must have the *Request Open Shifts* permission checked in the *Schedule Changes* section of the *Security Items* widget under the *ESS* tab of the security profile.
After managers have posted a schedule, selected the open shifts and posted those shifts to a set of employees, the employee will have the ability to request a posted open shift. Employees can request a shift by selecting a day from their schedule, tapping the pencil icon and then making selections on the resulting screen. The open shifts that have been posted for an employee will appear under Request Shift. The employees can then select a shift and press Submit to initiate the workflow. Depending on the workflow associated with open shift requests, the request will either be automatically approved, or a manager will be notified to approve the request.

Once an open shift has been requested, employees can track the status from their schedules. A message reading Open Shift Request Pending Manager Approval will appear until the request is approved. Employees will receive notifications if the request is rejected.
Availability/Preferences
If the Scheduler module sub-system is enabled in your company, and individual employees are authorized to set their own availability and preferences, the Availability/Preferences menu will display under the My Schedule menu.

To set your own availability, tap the days to be edited. The days will highlight and be added to a list at the bottom of the page.

Enter the times and click Apply. The times will display on the selected days. Tapping those days after adding the times will display the entered times below the calendar. The same procedure can be used for preferences.
**New UI Mobile Experience – User Guide**

### MY SCHEDULE

#### Schedule

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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<tr>
<td>19</td>
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<td>21</td>
<td>22</td>
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<td></td>
<td></td>
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#### Availability/Preferences

2 Day(s) Selected

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<thead>
<tr>
<th>Date</th>
<th>Availability</th>
<th>Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUG 06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AUG 07</td>
<td></td>
<td></td>
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</tbody>
</table>

### Edit Availability

**Date(s) Selected: Aug 06, Aug 07**

**Available For Time Frame**

**From**

- 7:00 AM

**To**

- 4:00 PM

**Add**

**CLOSE**  **APPLY**

### MY SCHEDULE

#### Schedule

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#### Availability/Preferences

2 Day(s) Selected

<table>
<thead>
<tr>
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<th>Availability</th>
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</tr>
</thead>
<tbody>
<tr>
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**Available**

- 07:00 am - 04:00 pm

**Preferences**

- 07:00 am - 04:00 pm
My Benefits

My Benefits will display your current benefit plans. If your company’s Open Enrollment for benefits is active, you can enroll in benefits from within this menu, or see the status of previous or ongoing enrollments.

Tap Main menu to return to the other options. Tapping the Home icon will return you to your home page, where you will need to access the hamburger icon again to get to the main menu options.

If your company has the My Benefits widgets on your Home page, you can perform many of the same functions there, such as viewing your benefit profiles and processing enrollments.
Enrollment
This tab will display Open Enrollment options, including new and pending enrollments, and the status of submitted enrollments.
Benefit Plans
Any benefit plans you are currently enrolled in will display here.
My HR

Under the My HR menu, users can view and respond to HR actions, checklists, forms, delegations and inventory.

HR Actions

In the New UI, HR Actions are accessed under My Info > My HR > HR Actions (for employees) and under Team > HR > HR Actions (for managers). Under Team, managers view a list of HR Actions assigned to their employees. If authorized, they can edit or start another HR Action of the same type and assign to another employee.

Overview

Because not all HR Action items are available in the New UI, a message will display to mobile users explaining to users that the action is not available.

HR Actions are accessed under My Info > My HR > HR Actions. Users will find HR Actions under the Available tab that have been pre-configured by a system administrator. All tabs contain a Search window where users can enter criteria to find only those HR Actions containing the characters listed. The system will search titles and descriptions.
Available Tab
The Available tab allows users to initiate an HR Action request. After tapping or clicking Start to initiate Hire actions, users must distinguish between new applicants and existing employees. For other types of actions, the employees can be retrieved from a search page.

Open Tab
The Open tab will list all open HR Action requests that have not had an action taken on them.

- A dynamic counter will display the total number of open requests on the tab. This number will be updated as requests are added, submitted, or deleted.
- When tapping the Actions icon, options will display such as Add Notes, Edit, Start Another, View History, and Delete. User security permissions will determine the options displayed.
- The View History option will redirect users to the Submitted tab where previously submitted requests can be viewed.

Submitted Tab
The Submitted tab will list all submitted HR Action requests that are completed or may require action. When tapping the Actions icon for an action, options will display such as Add Notes, View Details, Start Another, and Delete. User security permissions will determine the options displayed. Users will be able to search for specific HR Actions using the Search window. The system will search all tabs.

- Users will be able to add notes to their HR Action requests within the Notes field, after selecting the Add Notes option under the Actions icon.
- For managers, the ability to maintain default cost center fields for their employees are available if cost center items are included in the HR Action. The ability to edit cost centers can be controlled by the user’s security profile, or by checking the security override for the cost center item in the HR Action.
- In the desktop, managers can view their employees’ open HR Actions under the Pending HR Action Requests widget under Employee Information. Requests will be visible when the HR Action’s effective date is set in the future. The pending HR Action can be viewed by clicking the icon in the widget.
- HR Actions will display the details of the request in the Open and Submitted tabs. Details will include the date the action was created, Status, Workflow State (i.e., New), Approver, and the Effective Date.
After an HR Action is submitted, a To Do Item will be generated for the designated user. Viewing details, reviewing and editing of the To Do Item is supported prior to approving. After edits are made, a message will display indicating manual changes were made. Edits will display as the New value and will be bolded.

To Do Items - Mobile App Example
The examples shown below are from a user’s My Do Items, accessed under their My Mailbox icon.

Checklists
Employees with appropriate permissions can view and complete employee checklist items using the New UI on their mobile devices or desktop. Support for completion of checklist items is currently limited to employees and employee checklists.
**View Details**

Users can tap the *Actions* icon and select *View Details* to proceed through the steps to complete the checklist. From the pages, another *Actions* icon is available, allowing users to download a PDF of the checklist, or to upload a needed document to complete the requirements of the step.

**Upload Document**

The option to upload a document is available under the *Actions* icon. A document type and display name can be selected/entered, and a link is available to upload a file.
Download PDF
Under the Actions icon, users can download the checklist in PDF. The PDF will display all the steps in the checklist, and show which steps are completed (green check) or incomplete (blank checkbox).
Forms
Under the Forms menu, employees can access many different types of forms as uploaded by their company. Options include governmental forms, other forms, and an area for all forms. Employees can be given authority to edit forms under the Other Forms or All My Forms menu. In the available options under the Actions icon, users can edit or delete a form, create another form, download a PDF of the form, view the history of the custom form (what has been submitted) and view the detail report (where custom form items can be edited or deleted.)

The View Detail Report option will be available on both the Open and Submitted tabs.

Government Forms
Government Forms include forms such as 1095-C, 1099s, I9s, W2s, Withholding, and any other state or federal forms required by your employer.

Other Forms
Forms under this area will consist of any custom forms created by your company.

All My Forms
This area will house all your forms.
My Delegations
If a delegate has been set as your back up for handling the resulting My To Items from a workflow, those back up users, or delegates, will display here.

My Inventory
If an inventory items has been assigned to you, you can view and possibly add and delete those items here.
My Career

Under the My Career menu, employees can access information about their performance reviews and learning options, as configured by your company. If your company posts job openings, those can be accessed under the Jobs menu.

Jobs

If your company has authorized or enabled this option, you can search for open jobs in your company and Jobs will appear under the My Career menu. From the Jobs menu, select the Search For Jobs option and any available jobs will display.
Performance
Under the Performance menu are two options to review and/or act on your performance reviews, and an option to view and/or set your goals.

Performance Reviews
Employee can view their performance reviews under this menu. The ability to take any action on a performance review is dependent the permissions granted by your company.
**My Goals**

Employee can view performance goals created for them under this menu. The ability to take any action, such as creating, editing, or deleting goals will be determined by your company.

**My Incidents**

If your company has filed any incident reports (such as safety violations, accidents, etc.) they will display here.
My Pay

From the main menu, you can access pay history information from the My Pay menu. Tap the Pay History menu option. The page will default to Recent pay histories and will display your last three (3) most recent pay histories.
Pay History

From the main menu, you can access pay history information from the My Pay menu. Tap the Pay History menu option. The page will default to Recent pay histories and will display your last three (3) most recent pay histories.

If your company has the My Pay widget on your Home page, you can perform many of the same options there.

You can tap the Pay Statement link and download the full pay statement for that entry. On the Historical tab, you can enter a date range to view the pay statements for that range. Historical pay statements can also be downloaded via the Pay Statement link.
Tax Forms
Employee tax forms for viewing or action will be under this menu. Forms such as W2s, W4s, etc. may be under this menu.

W2
Employees can download W2 forms from their mobile devices and view W2 forms from the last seven years, provided that the tax year has been locked and signed off at the company or admin level and the employee's payroll history from prior years has been loaded into the system.

The form can be accessed from My Pay > Tax Forms. Users can consent to receive the form electronically, instead of requiring a paper copy by clicking the E-Consent button. Users who choose this option will not receive paper copies of the forms unless they turn electronic consent off.

A list of available forms is shown under the W2 label with a download icon in each row. After providing consent to receive the W2 form electronically, a PDF file can be downloaded by clicking the download icon. The PDF will appear in a pop-up and can then be printed or saved.
1099

Employees can access tax form 1099-MISC from their mobile devices and download PDFs of any 1099-MISC forms from prior years, provided that the tax year has been locked and signed off at the company or admin level and the employee’s payroll history from prior years has been loaded into the system.

The form can be accessed from My Pay > Tax Forms. All available years appear in a list, with the year shown on the left and a download icon in the row on the right. A PDF file can be downloaded and viewed by tapping the download icon. Copy B, 2 and C will be downloaded in a single two-page file.
Direct Deposits

Employees can manage direct deposits, set up new direct deposits, edit existing direct deposit accounts or designate specific amounts to be paid in a live paycheck. In addition, employees can also provide authorization to receive pay statements electronically instead of receiving paper copies.

From My Pay > Direct Deposits, employees can view information about existing direct deposit accounts. On the Direct Deposits tab, new direct deposit accounts can be added, edited or deleted. Details of active and inactive accounts can be viewed by scrolling down. Using the drop-down, users can select whether to view All Accounts, Active Accounts or Inactive Accounts. New accounts can be added by tapping the Add button and filling in the required fields.

The E-Consent button will allow employees to receive their pay statement electronically. Users who choose this option will not receive paper copies of the forms unless they turn electronic consent off.
By tapping the pencil icon for an existing direct deposit account, the details can be edited. If a Direct Deposit account has not previously been used in a pay statement, a trash can icon will appear next to the pencil icon. By tapping the trash can icon, the direct deposit account will be deleted. Users can add a new Direct Deposit account by tapping the Add button and filling out the required fields.
NOTE to Administrators: Electronic Consent can be enabled at the company level in the Electronic Consent widget, by checking the Enable checkbox under Company Settings > Global Setup > Company Setup in the Printed W2/1099 Options widget.

Mobile users can upload supporting documents after tapping the Actions icon for the direct deposit.

**Tax Information**

This area will display the employee’s tax selections, such as withholding for Federal, State, and Local taxes.
**Benefits Statement**

Employees can view a summary report of their benefits, by year, and opt to download the report as a PDF.
My Company

Under the My Company menu are options to view hierarchy charts or reports for Position Management (if enabled), as well as documents uploaded by your company.

If enabled (typically for Administrators and Managers), the Announcements, Company Directory, and Events menu options may be available.

Announcements

Users with access to this option can view and download the announcements.
Company Directory
This option will generate a report page of the employees in the system.

![Company Directory](image)

Events
This option will show any events created by an Administrator. The events can be downloaded by the user.

![Events](image)
Position Hierarchy
If your company is using Position Management functionality, the Position Hierarchy option may be available. Under the Position Hierarchy menu, options are available to view the data by chart or report.
**Position Hierarchy Chart**
The Position Hierarchy Chart will display the company’s positions in a hierarchical chart, with each position title displayed as a hyperlink, and when tapped, will change the view to show only that position with its details.

**Position Hierarchy Report**
The Position Hierarchy Report displays positions in a linear report format. When an arrow is tapped, details about that position will display.
Documents
Under the Documents menu, your company may upload company-specific documents for you to access. Tap the download link next to a document to download a PDF of the document.

Organization Chart
This option will show the system generated organization chart. Each person with subordinates will show with a number under their tile, indicating how many subordinates they have. The names are hyperlinked, and when clicked, will change the view to just the manager, that employee, and any subordinates the employee may have.
My Reports

For users authorized to view reports, those reports will be available under My Info (single employee icon) in the My Reports menu. Under this menu are saved and scheduled reports, team reports, and functional areas and modules reports.

In most cases the users who will have access to reports will be managers and administrators. Employees seldom have access to reports but can be allowed to view them if security permissions allow.

Common Options in Reports
The options shown below are available across all reports and are presented here to help you familiarize yourself with the navigation of these options.

Preserving Report Data When Navigating Away
When report views have been modified but not yet saved, they are preserved when users click on report-based buttons/links and then navigate back to the report view. Changes such as sorting, grouping, and filtering are preserved.

When a user clicks on a page level or row level action in a report, the options set in the unsaved view of the report such as added/removed columns, sorted columns, updated grouping, etc. are preserved. The unsaved view may not be preserved if users navigate away from the report using the Main Menu, using another tab in Mobile, or if accessing something other than what is available in the report page, such as Employee Information in the Employee Quick Links.

Manual Column Resizing
To manually expand a column, hover over the dividing line between columns until the double arrow displays and then click and drag the column to the desired width.
Automatic Column Resizing
Within the Mobile experience, the column widths will now dynamically adjust to the screen size and available space. Extra-long links will wrap if they exceed the available space. If the report page contains columns and actions ellipses, the actions will always display.

Inline Filtering
Report pages have filtering options known as inline filtering across each column on the page. Each column can be filtered with operators ( =, !=, starts with, not starts, like, not like, in, not in, is null, is not null, between, no between) and then a value placed in the field below the operator.

Sorting/Grouping Report Data
When viewing the report page, the data can be sorted by tapping on the Actions icon above the blue key bar displayed in the report and tapping Sort/Multi-Column Sort in the action popover list. Select the column and sort order to define how the data will be sorted. If one or more levels of sorting is needed, select Add Sorting Level. The pop-up will change from Sort to Multi-Column Sort. If a level is not needed, click the trash icon to remove it. To reset all sorting options, tap the Clear Sorting link.

Tap on the Apply button to enact the sorting criteria.

NOTE: The sorted view cannot be saved for later use from the mobile app.

Shortcuts
If using a desktop computer rather than a mobile device, multi-column sort is activated in a report on a Windows computer by pressing and holding either the Shift or Ctrl Key and clicking the sorting arrow for two or more columns to produce either an ascending or descending sort direction. On an Apple Mac computer this can be performed by pressing and holding the Command key and clicking the sorting arrow for the desired sort direction.

Clicking a column to apply filtering criteria, you will find tool tips when hovering over the Sort Ascending and Sort Descending text. The tool tip states you can hold the Shift key, click the option and activate the next level sort. You
can do this for multiple columns. In the report header, you will see the numbered columns indicating the sorting selections. You can hover over the number to see the applied sorting criteria.

Columns can also be sorted by placing your cursor in the column heading until the double arrows display. Clicking the arrows will change or toggle the column in ascending or descending order.

**Grouping**

Other options are available to *Group* by the filtering criteria. Once grouped, the *Grouped By* column will display. The drop-down in this column will show the column used to perform the grouping. Unchecking the column and clicking *Apply* will ungroup the column. If employees are included in the *Grouped By* column, an Actions ellipses will display and when selected will display links to *Employee Information* and *Employee Quick Links*.

Further sorting, filtering, and column settings can be applied to each line in the grouped column by clicking the down-arrow for the field.
**Column Settings**

Also within the column pop-up are Column Settings, which allow you to set a column width (100-700 pixels), set the alignment of column contents (system default, left, center, or right) and set a custom label.
Adding/Removing Columns
You can add, reorder or remove columns in reports to see the information that is most relevant to you. From the triple-dot action icon in a report, select Add/Remove Columns. Click on the appropriate icons to add a column or remove a column. To quickly find a column to add, you can enter a few characters in the Search field. Tap the arrows to change the order of selected columns in the report.

Custom columns can be created and added to the report by clicking Manage Custom Columns from the triple-dot actions icon on the Add/Remove Columns pop-up. From the Manage Custom Columns pop-up, you can enter the column name and field type, and create expressions using functions, constants and columns.

To create an expression, tap the Add Expressions link. On each tab, you can select the pieces that you will need to build the final expression. Functions are operations that produce the value shown in the report, using constant values (on the Constants tab) or data fields pulled from the system (on the Columns tab). Clicking the APPLY button on the tabs will add the item to your expressions box on the Manage Custom Columns pop-up, where the final expression can be edited.
For example, to add a column that returns True or False to indicate if an employee is terminated or not, you would create this expression: `Eq(EmplStatusName, "Terminated")`. From the Functions tab, you would find and add this function to the expression box by tapping the Apply button at the bottom of the page.

From the Columns tab, you would find the name of the data field that represented the employee status, select it and tap the Apply button to save the column.

Both items are added to the Expression box on the Manage Custom Columns pop-up, but they are added in the order in which they were selected from the tabs. To complete the expression, you’ll need to edit the text in the Expression box. The column will appear in the list of columns on the Add/Remove Columns pop-up. After the label and expression are completed, you can tap Apply to add the custom column to the report.

View Mode

Under the Actions icon, is the View Mode option. Under this option you have the options of viewing reports as Data Only, Charts Only, or Charts & Data.

For more information on charts, please see the Report Charts section of this document.
The *Data Only* is default option and will display reports in a traditional report view.

The *Charts Only* is an option to view the report in a graphical view.
The *Charts & Data* option will display both the traditional reports at the top of the screen with the charts underneath.
Filters Icon
Under the funnel icon are multiple filtering options. Three columns are available: Global, Column, and Custom. These options can also be accessed from the filter selections next to the icon that displays the time period. The time period and date range can be selected from the drop-downs for Type and Date Range.

Filters – Global Tab - Employee Selections
You can select employees to be included in certain reports. This is done under the Global column of the filter. Tap the drop-down for the Employee Filter and selections to Browse will be available. After selecting Browse, the Employees Filter and all employees to which the user has access will display.

Select the employees to be included, then tap the Actions icon and select Add To Selection. The filter will display the number of employees selected. Tap Apply. On the subsequent page, tap Apply again and those employees will be selected for the report and a “pill” will display showing how many employees have been selected for inclusion in the report.
Filters – Global Tab – Company Groups
After selecting Browse from the Employee Filter, you can select employees by the group to which they are assigned. These are selected under the Company Groups tab. If your group list is large, you can use the Group Type and Search window to narrow the list.

When the groups display, tap to select each group, tap the Actions icon and select the Add To Selection option. The groups selections will be added to the filter and placed under the Selected tab.

If a group has been selected within the filter, after tapping Apply, you will be prompted to convert the group to an individual employee list. If you select No, the group filter cannot be applied and should be removed from the filter.
Filters – Column Tab
Filters restrict the type of data that is returned based on column values. Different types of filters are available for different types of reports. Column filter selections will not be saved after exiting the report or logging off.

The column filtering can be changed by tapping on the Columns filter or tapping the filters icon again. Filters can be cleared by tapping the Clear Filters link.

Filters – Custom Tab
Custom columns cannot currently be created in the mobile experience. If custom columns have been created by a desktop user, they will be available for selection under this tab.
Saving Views and Exporting Report Data
Mobile experience report users have the same options available for saving views and exporting reports as desktop users.

- **Save View & Save View As** - After tapping the Actions ellipses, the Save View and Save View As options are available. If the report has been modified, but not yet saved, the Reset option can be used to return to the default view. When saving a view, you must provide a name and can optionally add a description and tag. You can make the view the default, disable deletion of the view and share the view with other employees.

- **Manage Views** - The Manage Views option enables users to Run or Delete an existing view. The Edit option under Manage Views allows you to change the view settings, such as name or sharing.

- **Export & Export Settings** - Export settings including layout, margins, font size, page break, header and footer display, column name display, and totals display options are now available in the New Mobile App. The character used to populate fields that do not contain data can be selected as well. All columns are included in the export file by default, but the columns can be limited in the export settings.

- When a report has more than one view, the view selector is aligned with other controls in the report header.

My Saved Reports
Reports that have been saved for you or by you will display under the My Saved Reports menu. These saved reports can be run by tapping the Actions icon and selecting Run. Some reports will have additional options such as Edit and Delete.

- The Edit option will allow you to adjust how the report is saved. The Delete option will remove the report from the saved list.

- Report titles are displayed as hyperlinks and when tapped, will open the report. The back arrow in the open report can be tapped to return to the saved list.
• Others’ Settings – When the option is not enabled, users see only the report views for which they are the owner. When the option is enabled, users see all report views that have been made available to them by other users.

**Edit – Saving/Sharing a Saved Report**

The *Edit* option will open a *Save View* page where you can edit the saved report. The name and description can be edited, and a tag name can be added. The report can be set to disallow deletion, make the report your default report, and share the report with others in your company.

- If selecting the *Share* option, you can select specific employees or choose to share with all employees.
- Once the settings are done, the report can be saved, or an option is available to save and run the report simultaneously.
Other Saved Report Options
For saved reports, other options are available that will allow you to manage schedules for emailed reports, and to deliver the report with payroll. These options are only available within saved reports that have been run. The Actions option in the report will display these options for authorized users.

Manage Email Schedules
This option allows users to Delete, Edit, Email Now and do an Add Schedule to send reports to recipients. The Manage Email Schedules option is disabled for system reports.

After selecting the option, select Add Schedule to create a new schedule.

Users can enter/edit the following fields in the Schedule section:

- **Schedule Type** - In the Schedule section for the required Schedule Type field, the user can choose Weekdays or a Days Profile.
  - For Weekdays, select the days of the week.
  - When setting an email schedule for a saved report, the first day of the week and subsequent pattern in the Schedule section will be based on the First Weekday setting in Company Setup.
  - For Days Profile, select a profile in the Days in Days Profile field. The text in the field label is linked to the data in Company Settings > Profiles/Policies > Days where edits can be made, or a new profile created and used.
  - A Tooltip in the Days In Days Profile field displays the rules configured in the selected profile.
  - When using a Days Profile, the language/locale specified for the user’s employee account will display in the Tooltip.
  - If the field is empty, the Tooltip will be grayed out.
• If no rules are set in the selected Days Profile, a message will display indicating no rules are configured for the profile.

• **Schedule** - The user can input the desired time in the required *Schedule* field.

• **Recipients** – Select to send the report to yourself, or select a specific account, group or email address (multiple email addresses can be added by clicking *Add*). Select the permissions for the recipient; you can choose your own, or theirs. If the schedule owner’s permissions are used, do not include sensitive data in the report view.

• **Email** – Set a report format (PDF, Excel, etc.) and optional password. Fill out and format the email and message body. A maximum of 3,500 report rows can be included in the report, but the number of rows can be specified if fewer than 3,500 rows are required.

Once the schedule is set and saved, options under the *Manage Email Schedules* page can be selected under the Actions ellipses to edit the schedule, delete the schedule, or to email the report now.

After adding an email schedule to a saved report, if there are one or more schedules assigned, an email schedule icon will display next to the *Manage Email Schedules* option under the Actions icon for that report. When this icon is present, users will know that an email schedule exists.

Note that the saved report is located under *My Info > My Reports > My Saved Reports*; and the saved report must be opened or run to access the options under the Actions ellipses to manage the saved view.
Deliver With Payroll

Report deliveries can be automated for saved report views. To enable delivery, run the saved report, and select the Deliver with Payroll option from the Actions icon in the report. Enable the Enable Deliver With Payroll option and complete and save the options in the pop-up.

For the Deliver With Payroll and/or Schedule This Report option(s), when users update the view of a report from a personal setting to one visible by others, a warning message is displayed.
The warning states: You will lose existing configuration of Deliver with Payroll Schedule upon making the view company wide. You will lose existing configuration of Schedule upon sharing this view.

Users must have the option to Schedule Reports To Deliver With Payroll enabled in their security profiles.
My Scheduled Reports
Reports that have been scheduled can be selected and then exported in various formats.

Team Reports
For employees who are also managers, the Team Reports menu will contain reports related to the employees they manage. The reports here are directly related to Position Management, which must be enabled at the company level. Reports include Employees Missing Primary Position, Exceptions for Reports-To Position, Position Headcount Detail, and Position Headcount Summary.

Time Reports
The Time Reports menu contains sub-menus for Adjustment Pay, Attestation, Audit Trail, Calculated Time, Extra Pay, Overtime, Time Allocation, and CMS. Some reports show data, while other reports contain functionality such as adding, deleting, editing, and more.

- **Adjustment Pay** – This sub-menu contains the Adjustment Pay Summary and Detailed Adjustment Pay reports, which will show data for manual adjustments made in employee timesheets to adjust pay that is passed on to payroll.

- **Attestation** – This sub-menu contains the Daily Attestation Summary, Questions and Answers, and Timesheet Attestation Summary reports. These reports will show data specifically related to time processed where Attestation is used when employees punch in and out.

- **Audit Trail** – This sub-menu contains audit reports that will show before/after values when employee time has been edited. Reports include Attestation Question, Attestation Workflow, Employee Schedule Entries, Extra Pay & Counter Adjustment, Extra Pay Entries, Overtime Requests, Approve Time Entries Access Report, My To Do Items Access Report, Time Adjustment Entries, Time Entries, Time Off Requests, and Timesheets.

- **Calculated Time** – This sub-menu contains reports showing the calculated time from timesheets. Reports include Annualized Projected Hours, Average Calculated Time, Calculated Cumulative Counter, Calculated Time Summary (more reports under this sub-menu), Detailed Calculated Time, Detailed Corrected Time, Lunch And Breaks, and Spells of Absence.
• **Calculated Time Summary** – This sub-menu contains calculated time reports broken down in various aspects. Reports include Calculated Time Summary, Calculated Time By Calendar Day, Calculated Time By Week, and Calculated Time By Work Day.

• **Extra Pay** – This sub-menu contains reports showing data for extra pay that has been manually added to employee timesheets. Reports include Detailed Extra Pay, Detailed Extra Pay Counters, Extra Pay Counters Summary, and Extra Pay Summary.

• **Overtime** – This sub-menu contains reports showing data of employee overtime. Reports include Employee Overtime Overview and Employee Overtime Request Summary.

• **Time Allocation** – This sub-menu contains reports showing data of various breakdowns of employee time. Reports include All Timesheet Documents, All Timesheet Notes, Attendance Board, Detailed Hours, Detailed Hours Overview, Detailed Hours Overview (PDF), Exceptions, Exceptions Summary By Week, Late/Early/Absent Report, Rules Analysis, Summary Hours (more reports under this sub-menu), Time Off Roster, and Time Summary By Week.

• **Summary Hours** – This sub-menu contains reports breaking down summary hours by various methods. Reports include Summary Hours Overview, Summary Hours By Cost Center, Summary Hours By Day, Summary Hours By Employee, and Summary Hours By Week.

• **CMS** – This sub-menu contains the CMS Submission report, which allows for the export of CMS Payroll Based Journal files.

### Schedule Reports
The Schedule Reports menu contains the Attendance sub-menu, which contains the Scheduled vs Actual report, which displays employee scheduled hours versus the hours they worked.

### Benefits Reports
The Benefits Reports menu contains reports that may only contain data, while other reports are functional report pages that allow you to add, edit, delete and perform other actions for employees. Reports include ACA, Balances, Benefit Census Report, Benefit New Hire Status, Benefit Open Enrollment Status, Benefit Reconcile Report, and YTD Amounts Paid.

• **ACA** – This report displays an ACA audit trail, showing what was changed and before/after values.

• **Balances** – This report is the Accrual Balances report and allows accruals to be run and edited.

• **Benefit Census Report** – This report shows an overview of employees and the benefits assigned to them.

• **Benefit New Hire Status** – This report shows all new hires and their statuses and shows if they have begun working.

• **Benefit Open Enrollment Status** – This report shows the status of open enrollment of your employees. It will show if enrollment is in progress, completed, rejected, or not started.

• **Benefit Reconcile Report** – This report will show an overview of the benefits assigned to employees and the statistics of each benefit plan.

• **YTD Amounts Paid** – This report will show the yearly amounts paid on benefit plans.
HR Reports

The HR Reports menu contains sub-menus for Employee Maintenance, HR Maintenance, Turnover, and Marketplace, all of which contain other report options.

- **Employee Maintenance** – This sub-menu contains reports that may only contain data, while other reports are functional report pages that allow you to add, edit, delete and perform other actions for employees. Reports include Additional Compensation History, Base Compensation History, Checklists, Checklist Items, Detailed Rates, Job Change History, and All HR Action Requests.

- **HR Maintenance** – This sub-menu contains reports that mainly contain just data about your employees. Some reports have editing capability, and most contain icons to open employee accounts and a quick links icon. Reports include Cost Centers Accessible To Employee, EEO Classification, Employee Contacts, Employee Contracts, Employee Headcount, Employee Information (Labels), Employee Information (Printing), Employee Notes, Employee Roster, Employee Status Change, Employee Summary, Ethnicity (Summary), Hardware Settings, Pay Grade (Assigned To Employee), Seniority, and Veterans (Summary).

- **Turnover** – This sub-menu contains reports for HR professionals to help them assess employee turnover within their companies. The reports in this menu show data only. Reports include Termination By Reason Code, Turnover Rates (more reports under this menu), Turnover Statistics.

- **Turnover Rates** – This sub-menu contains turnover reports broken down in different ways. Reports include Turnover Rates Summary and Turnover Rates By Cost Center.

- **Marketplace** – This sub-menu contains the Certify Marketplace product report, which displays an update of tasks run within the Certify product.

Talent Reports

The Talent Reports menu contains reports to help measure your employees’ performance. If using the Points module, two reports are available. They are the Detailed Points Report and the Points History Report. Each report has functionality for running or editing employee points. The Performance Reviews Report is also available under this menu and this report provides an overview of performance reviews and statistics.

Compensation Reports

The Compensation Reports menu contains reports when using the Compensation module to plan, budget, and track employee pay. The Manager Budget Report gives a detailed overview of compensation cycles, while the Process Results report shows the compensation proposals that have been processed.

Payroll Reports

The Payroll Reports menu contains multiple sub-menus, with each containing multiple reports. These reports are geared to the Payroll professional and most likely would not be enabled for other employee types. Sub-menu options include Payroll Funding, Post Payroll Reporting, Pay History, Payroll Register, Labor Distribution, Taxes, Miscellaneous, and Audit Trail.

- **Payroll Funding** – The reports under this sub-menu contain data related to the funding process. Reports include Adjustments/Arrearages, Back Account Transactions, Payroll Funding, Payroll Payments, Payroll Recap & Funding, and Vendor Payments.

- **Post Payroll Reporting** – The reports under this sub-menu contain data related to payroll status after running and funding payroll. Most of these reports display information in a summary format with options to view specific pieces of each report. Reports include General Ledger (Summary), General Ledger (Summary) Reworked, General Ledger (Summary) Enhanced Accruals, Workers Comp Code (Summary), Retirement Plan Report Summary, and Retirement Plan Report Detail.

- **Pay History** – The reports under the sub-menu contain targeted reports displaying data of specific elements of previous pay cycles. Most of the reports display data and a couple reports have additional options. Reports include Child Support Calculation Details, Garnishment Calculation Details, Pay Statement History (Detail), Pay Statement History (Summary), Earning/Deduction/Tax Listing, Earning/Deduction/Tax Listing (Summary), Pay Statement Records History, Pay Statement (Benefit Coverage), Payroll Alerts, and Pay Statement Custom Calc Rule Log.
• **Payroll Register** – The reports under this sub-menu contain report pages to customize the report to include a variety of data showing employees in payroll. Reports include *By Employee, By Cost Center, Pay Statement Detail, Pay Statement (Summary), By Employee MTD/QTD/YTD*, and *YTD Summary*.

• **Labor Distribution** – The reports under this sub-menu contain various reports to view how labor is distributed in either detail or summary format, or by various criteria within pay statements. Reports include *Labor Distribution (Detail), Labor Distribution (Summary), PST View By Account, PST View By CC, PST View By Account Within CC, and PST View By CC Within Account*.

• **Taxes** – The reports under this sub-menu contain reports where taxes can be viewed by various tax wage reports, summary information from the boxes within W2s and other tax documents that can be uploaded and mass edited. Reports include *Tax Wage Details (more reports under this menu), Form W2 (Summary), and Tax Documents*.

• **Tax Wage Details** – This sub-menu contains multiple reports that allow you to focus on various details, such as all details, details by account, details by payroll and details by pay statement. Reports include *Tax Wage Details, Tax Wage Details By Account, Tax Wage Details By Payroll, Tax Wage Details By PST*.

• **Miscellaneous** – The reports under this sub-menu contain a Benefits Statement (Printing) report that allows an employee benefits statement to be downloaded to PDF and contains a Tip Credit Report that display FICA tip credits made to employees.

• **Audit Trail** – This sub-menu contains the Company Taxes report which displays audit information made to taxes.

**Recruitment Reports**
This menu contains the *Time to Hire* report and displays details for newly hired employees including how long it took to hire the employees. This report is only available if the Recruitment module is enabled.

**System Reports**
This menu contains reports for managers and administrators about various elements within the system. Reports are available for Access Control, Audit Trail, and System Utilities.

• **Access Control** – The reports under this sub-menu are only used with the Access Control module. The display data such as an Access attendance board, showing who is in/out and where they accessed the building, employee access history, remote device use, unknown badges, visitor history, and zones. Reports include *Access Attendance Board, Employee Access History, Remote Device Access, Unknown Badge Usage, Visitor Access History, Zone Access History, and Zone Access Status*.

• **Audit Trail** – The reports under this menu show audit information for various types of information. Reports include *Account Info, Employee Contracts, Master Data Changes, Middleware Password Audit, PII Audit, and Virtual Code Authentication*.

• **System Utilities** – The reports under this menu show data lists, but many reports are also tools for administrators to use to process certain functions within the application for the purposes of clearing or completing functions for users or for testing purposes. Reports include *All Cost Centers, All Punches (All Punches Detail and All Punches Summary), All To Do Items, Global Access, Group Membership, Mailbox, Popup Communicator Usage, REST Invocations, Swipe Summary, and Unprocessed Punches*.

**HR**
This menu contains the *PayScale Compensation Data* report, which allows PayScale Requests to be added and viewed.
Help

In this menu, your company may view online documentation, download PDFs of user guides and other documentation, and access your training/learning options.
External Items

The *External items* menu item in the New UI, located under the *My Info* menu supports the use of externally linked URLs. Once defined, the external links will become active for the users assigned to the security profile. When activated, a separate browser will open, independent of the session.

System administrators will define these links within the *Extra Menu Items* widget of security profiles.

<table>
<thead>
<tr>
<th>Menu Name</th>
<th>Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>External items</td>
<td>150</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
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<td>Kronos</td>
<td><a href="https://www.kronos.com">https://www.kronos.com</a></td>
</tr>
<tr>
<td>2</td>
<td>Community</td>
<td><a href="https://community.kronos.com">https://community.kronos.com</a></td>
</tr>
</tbody>
</table>
Report Charts

Within the New UI, charts can be added to any report to provide a graphical representation of report data.

Things You Need to Know

- All charts created will reflect the complete report provided above it. For example, if there are six pages for a report and you are looking at only the first page, the charts will show data from all six pages.

- All charts will be filter based on the report as well. If the default date range for the report is Today, and then this is changed to This Week, all charts will instantly update along with the report.

- Charts are associated with report views. Once saved, and if you decide to share the report view, the charts will be shared with it.

- There is a maximum limit of 3 charts that can be created for a single report view.

View Mode

In the New UI, navigate to a report and tap the Actions icon and select View Mode. Options are available to view the report as follows:

- **Data Only** – This is the normal default view of report data.

- **Charts Only** – This option will show your report only as a graphical chart.

- **Charts & Data** – This option will show both your default view at the top, with the chart view at the bottom.
After making a view selection, the Mode option will display next to the Actions icon. The default will show Data Only.

**Show Data Only**

**Show Charts Only**

**Show Charts**

### Adding and Selecting Charts

Once the chart panel is open, you can add or select an existing chart by accessing the options under the Actions icon. If you already have 3 charts in your view, the Add Chart option will not display.

Upon selecting Add Chart, a side panel will open with options for creating a new chart. Select a Chart Type, Data metrics, Chart Display options and edit the title if you prefer a different one from the automatically generated one.

Depending which type of chart is selected will determine the type of data and metrics that can be selected, i.e., a Pie Chart will not contain an X or Y axis.
Once charts have been created and saved, they will be available for selection by choosing the *Select Charts* option.
Dashboards

The ability to create charts for reports allows for compelling at-a-glance visuals of your data. By providing the ability to add report charts from a variety of reports across the application, dashboards bring important information to users upon logging in.

Users can customize their own dashboard experience directly from their home screen by adding report charts. Module dashboards are also available, i.e., a dashboard is available for managers under the Team menu under My Team, Time, Accruals, Leave, Schedule, Benefits, HR, Talent, Learning, Compensation, Recruitment, and Payroll.

Things You Need to Know

- My Dashboard can be accessed via the My Dashboard tab upon logging in.
- There is a maximum limit of 6 charts per single dashboard. This is the limit for My Dashboard as well as for module dashboards. If the limit has been reached, a message will display to the user informing them that the limit has been reached. Users can use Save As to create more views. The Add Chart option will remain on the page but will be grayed out.
- Module dashboards are also available under each menu option within the Team menu. If a manager has the TLM Time menu, a Dashboard option will be available, and charts related to only time functions can be added. The same would be true for HR, Benefits, etc.
- When you have charts within dashboards, the title to each chart serves as a hyperlink which, when clicked, will send you to the report view it is sourced from. Each data point (for example: single bar in a bar chart, single point in a line chart) can be tapped which will send you to the filtered report based on the selection.
The options under the Team menu (the multi employee icon) are typically used by front line managers and supervisors to manage their staff’s timesheets, HR enrollments, schedules, and other management related items.

This section discusses the manager experience when those options have been enabled and may include sub-systems your company may not have. Not all options shown will be available to you depending on your permissions. In some cases, additional information is provided for certain functions.

My Team Menu

For managers, the employees shown under the Team tab will consist of employees assigned to them. This is done through groups, as configured under Company Settings > Global Setup > Groups and/or assigned to them from the employees’ accounts in the Manager widget. From the Team main menu (the multi-employee icon) is the My Team sub-menu which contain options for managers to manage their team members. These are shown below.
• **Dashboard** - This menu allows users to create graphical charts based on reports for which they have access. Charts can be added by tapping the *Add Chart* link and then selecting a report and applying any additional criteria. The *Actions* icon contains an option to remove the chart.

• **Team Members** - This menu displays the employees assigned to the manager. For employees who have punched in, their latest punch will display under their name with a clock/arrow icon; downward arrow indicates they are in and the grayed out upward arrow indicates they are out. The *Actions* icon next to each employee contain additional options so managers can quickly access other employee options such as Benefit Plans, Profile, Time Off and Timesheet.

• **Employee Information** – With this menu, managers can view their employee’s accounts in read-only mode. This page has options to filter the list, and if any saved views have been previously done, those can be selected in the drop-down field for *Employee List*. This view also has an *Actions* icon containing options for View Mode, Sort, and Export. The View Mode has additional options about how you want to view the data. You can view Data Only, Charts Only, or Charts & Data. When selecting to view with charts, you will have the option to add charts and manage them.

• **Employee Assignments** – This menu only works with Position Management functionality, which must be enabled in the company. If enabled, this menu will display employees according to their position hierarchy, or rather, the employees reporting to the manager/user. If a user does not have anyone reporting to them, they will not display in this report. Position assignments can be added here.

• **Reports** – This menu contains reports related to the manager’s team, such as information related to Positions within Position Management.
Time Menu

Under the Team menu is the time sub-menu, under which are options related to employee time management, including a time dashboard, employee timesheets, employee time off, employee leave, and time reports.

- **Dashboard** - Under the Time menu, is an available dashboard where graphical report charts can be viewed, added, and managed.

- **Timesheets** - Under the Timesheets menu, are options for viewing and/or taking actions on employee timesheets. For timesheets pending approval, these will display under the *Pending Approval* menu. A number will display to indicate how many timesheets need approval. In the *All Timesheets* menu is a report of all the manager’s employee timesheets and certain actions can be taken. Any employee change requests to timesheets that have been submitted to the manager will display under the *Change Requests* menu where action can be taken to approve/reject the request.

- **Timesheets** - The *All Timesheets* menu is a report that displays all the manager’s employee timesheets where they can be approved or edited. The *Actions* icon will present options to edit or view information. The right arrow can be tapped, and more details will display and the options under the *Actions* icon will still be available.

- **Change Requests** - If employees have the authority to submit timesheet change requests, those will display to the manager under the *Change Requests* menu.

- **Time Entries** – Displays a list of individual time entries that can be approved, rejected, or reset.

- **Time Entry To Do Items Pending Approval** - The Pending Approval menu will display all employee submitted timesheets. Managers can view details and approve or reject. The *Actions* icon contains an option to view the employee’s profile. The details can be viewed or hidden and will display any hours outside normal worked time. The conversation bubble displays any comments attached to the submitted timesheet.

- **Time Off** - The Time Off menu contains options to view pending requests, submit requests for employees, view request history, view balances, view the time off calendar and open absences.

- **Pending Approval** - The Pending Approval menu contains all the time off requests submitted by the manager’s employees. The requests can be approved or rejected. From the *Actions* icon, options are available to delete the request or view the employee’s profile.
• **All Open** – Shows a list of all open time off requests.

• **Request** - The Request menu allows managers to create time off requests for their employees. Once submitted, the request will display under the History menu.

• **History** - In the History menu, time off request will display. In the Period drop-down, time periods of next year, past year, next 3 months, and past 3 months can be selected.

• **Time Off Calendar** - This calendar will give managers a team view of the time off requests for their employees.
  - Orange = Current date
  - Dark Red = Any holidays that are set within the company’s Holiday Table
  - Orange Dot = Indicates a Pending request
  - Green Dot = Indicates an Approved request - dates can have more than one request and more than one type of request.

    Users can tap the date containing these dots and the employee requests will display under the calendar and show the employees, the hours of the request, and the status of the requests. Quick links are provided for each employee by tapping on the Actions icon. Links to the employee profile, time off history and benefit plans are available.

• **Balances** - In the Balances menu, a specific employee can be selected, and any configured time off balances will display by type. A Request link is available for each time off type, so the manager can submit a request on the employee’s behalf.

• **Open Absences** - If using Open Absences functionality, any employee open absence cases will display here. Tapping the arrow will open the details of the case.

• **Overtime** – This menu contains items related to overtime requests and history.
  - **Pending Approval** – Shows a report of pending overtime requests requiring the manager’s attention.
  - **History** – Shows a report of employees with overtime requests.

• **Points** – If the Points module is enabled, this menu option displays.
  - **Balances** – Shows a report of employee point balances.

• **Reports** - Under this menu are multiple time reports such as Adjustment Pay, Attestation, Audit Trail, Calculated Time, Extra Pay, Overtime, Time Allocation.
Accruals
The Accruals menu contains pages for managers and includes options to view and/or create a dashboard, view accrual balances and history.

- **Dashboard** - Allows graphical Report Charts to be created, typically in relation to the Accruals module. For more information about these charts, please see the Report Charts section of this document.
- **Run Accruals** – Allows managers to run accruals rules and update accrual balances.
- **Balances** - Will display employee accrual balances by the pay period and accruals profile. Tapping the arrow will show all employees who have taken time under those profiles and display the details according to time off, dates, and other employee details. Accruals can be executed, rolled back and balances moved from category to another.
- **Modify Employee Hours** – Allows managers to manually modify accrual balances.
- **Used By Balances** – Shows a report of manager’s employees and shows each time off category, the amount, and when the balances should be used by. An option to subtract unused hours is available.
- **Balances As Of Date** – Shows balances as of the dates entered.
- **Details** - Is a report showing employee history of time off taken.
Leave
Under the Leave menu are pages for managers and include options for processing employee leave cases. The options include leave balances, leave cases, leave entries, leave history, and forms. For European companies, the Bradford Factor can be enabled at the company level. The option will then display under this menu. Forms affecting leave cases are available for the manager to view.

- **Dashboard** - Allows graphical Report Charts to be created, typically in relation to the Leave module. For more information about these charts, please see the Report Charts section of this document.
- **Balances** - Will display hours balances left and taken in the leave case.
- **Cases** - Will display any leave cases for the manager’s employees and show the start/end dates, status, frequency, and any other details associated with the leave case.
- **Entries** - Will display leave entries generated for an employee’s leave case. These entries may be populated in the employee’s timesheet as well.
- **History** - Will display leave request history such as the workflow status, start/end dates, and date submitted.
- **Bradford Factor** – Will display details of an employee’s spells of absence, days of absence, the Bradford factor and profile.
- **Forms** – Will display forms associated with certain employee leave cases such as such as WH-380, 381, 382, 384, and 385.
**Schedule Menu**

Under the Schedule menu are pages for managers and include options to view and/or create a dashboard with Report Charts applicable to scheduling. Options are available to set up options for the manager's team members, view employee basic scheduling information, and scheduler reports.

- **Dashboard** – Managers can view and add charts that are related to employee scheduling, such as Scheduled & Clocked Hours by Employee, Total Scheduled Hours by Department, etc.
- **Team Setup** – Under this menu, managers can assign cost centers and skills to employees, as required by the Scheduler module. This menu also contains a maintenance calendar for Availability/Preferences where managers can define an employee's availability to be scheduled with the Scheduler module, as well as defining any shift preferences the employee may have.
- **Advanced Scheduling** – If your company has the Scheduler module enabled, this menu option will display. A Schedules option will display the schedule created under the Scheduler module.
- **Basic Scheduling** – Managers can view their employees' work schedule cycles under this menu in relation to the basic scheduling functions within the TLM module.
- **Team Schedule View** – Contains additional menu options to view schedules according to schedule entries, an overview, daily schedule, or weekly schedule.
- **Reports** – Under this menu are multiple reports for the Scheduler module. Reports such as Staffing, Attendance, Workload Manager and Employee Requests are included in this menu.
Benefits Menu

Under the Benefits menu is an available dashboard, and information about benefit plans and details, dependents, enrollment requests, ACA items and reports.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to employee benefits. For more information about these charts, please see the Report Charts section of this document.

- **Benefit Plans** - Under the Benefit Plans menu, you can select an As Of Date and filter the list to include only certain employees and view their benefit plans. Managers can tap the arrows to view benefits in read-only mode.

- **Benefit Plan Details** - Under the Benefit Plan Details menu, managers can view the details of their employees' benefit plans. Under the Actions icon, is an option to print the plans. Under the Current drop-down, options are available to view past, current, future, all, waived, and all waived. Under the All Benefits Group drop-down, if more than one benefit plan is available within a benefit group, those can be selected here.

- **Dependents** - Under the Dependents menu, managers can view read-only information about their employees' dependent information.

- **Enrollment Requests** - Under the Enrollment Requests menu, menu options are available for auto-enrollment requests, details of change requests, and a summary of change requests.
  - **Auto-Enrollment Requests** - Any employee enrolled in benefits via the auto-enrollment process will display under the Auto-Enrollment Requests menu.
  - **Change Requests Detail** - Any employees who have processed a benefit plan change request will display here. Tapping the arrow in each plan will open the details of the benefit plan change.
  - **Change Requests Summary** - A summary view of employee benefit change requests can be viewed under the Change Requests Summary menu. In this view, the very basics of the change request are shown, such as status, type, and dates.
• **ACA** - Managers can view their employees' ACA information under the ACA menu. The ACA widget options from Employee Information, along with other ACA reports are available under this menu in read-only format. Under this menu are multiple ACA report pages such as ACA Data Detailed, ACA Data Summary, ACA Status Change and ACA Year End Processing. Forms 1094 and 1095 are also available here.

• **Reports** - Under the Reports menu are reports related to employee benefits such as Accrual Balances, Benefit Census Report, Benefit New Hire Status, Benefit Open Enrollment Status, Benefit Reconcile Report and YTD Amounts Paid.

**HR Menu**

Managers who have access to HR functionality will find various HR options under this menu such as a dashboard, HR Actions, Checklists, Forms, HR Maintenance, Employee Maintenance and Reports.

![HR Menu](image)

• **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to HR functionality. For more information about these charts, please see the Report Charts section of this document.

• **HR Actions** - Under the HR Actions menu, users can view and process requests under three tabs, Available, Open, and Submitted. For supported HR Actions, you can do the following.

  • **Available Tab** - The Available tab allows users to initiate an HR Action request. After tapping or clicking Start to initiate hire actions, users must select employees and enter any other required information before being allowed to proceed.

  • **Open Tab** - The Open tab will list all open HR Action requests that have not had an action taken on them. A dynamic counter will display the total number of open requests on the tab. This number will be updated as requests are added, submitted, or deleted. When tapping the Actions icon, options will display such as Add Notes, Edit, Start Another, View History, and Delete. User security permissions will determine the options displayed. The View History option will redirect users to the Submitted tab where previously submitted requests can be viewed.
• **Submitted Tab** - The Submitted tab will list all submitted HR Action requests that are completed or may require action. When tapping the Actions icon for an action, options will display such as Add Notes, View Details, Start Another, and Delete. User security permissions will determine the options displayed. Users will be able to search for specific HR Actions using the Search window. The system will search all tabs.

  - Users will be able to add notes to their HR Action requests within the Notes field, after selecting the Add Notes option under the Actions icon.

  - For managers, the ability to maintain default cost center fields for their employees are available if cost center items are included in the HR Action. The ability to edit cost centers can be controlled by the user’s security profile, or by checking the security override for the cost center item in the HR Action.

  - HR Actions will display the details of the request in the Open and Submitted tabs. Details will include the date the action was created, Status, Workflow State (i.e., New), Approver, and the Effective Date.

  - After an HR Action is submitted, a To Do Item will be generated for the designated user. Viewing details, reviewing and editing of the To Do Item is supported prior to approving. After edits are made, a message will display indicating manual changes were made. Edits will display as the New value and will be bolded.

• **Checklists** - Employees with appropriate permissions can view and complete employee checklists and checklist items using the New UI on their mobile devices (or desktop.) The Checklist menu is divided into three tabs; Available, Open, and Submitted.

  • **Open Tab** – Under this tab all uncompleted checklists will display. From the Actions icon on the Open tab, users have options of View Details, Upload Document, View Checklist Items, Assign Another, Download PDF, View History and Delete. The tab title will display a counter number which will dynamically change as checklists are added, processed, or deleted.

  • **Available Tab** - Under this tab, checklists that have been created in the company will be available to be assigned to employees via the Assign link.

  • **Submitted Tab** - Any checklists that have been completed and submitted will display under this tab.

• **Forms** - Managers can view and edit the forms assigned to their employees under the Forms menu. Forms include government forms, other forms, such as company created custom forms, and all forms.

• **HR Maintenance** - Under the HR Maintenance menu, managers can view and edit sub-menu items such as Assets, Contracts, Disabilities, Employee Documents, Incidents, Inventory, Vehicles, Workers Claims, and Workflow Questionnaires. Managers with access to employee accounts will have access to an Employee Information option under an Actions icon for many of the items. Some sub-menu items will contain different options depending on the type of item.

• **Employee Maintenance** - Managers with access to employee accounts can view and edit certain account widgets in under the Employee Maintenance menu. Other options under this menu include Badges, E-Verify (if enabled), Termination Details (view/edit), and Opt-Out Agreements.

• **Reports** - Under the Reports menu are main headings for HR related functionality with multiple sub-menus under each where HR reports can be accessed. Reports are available such as Employee Maintenance, HR Maintenance and Turnover.
**Talent Menu**

Under the Talent menu are pages for managers and include options for managers to view their employees’ employee perspectives scores (if functionality is enabled), performance reviews, points (if functionality is enabled), succession planning (if using), and reports related to these options.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to employee measurement functionality. For more information about these charts, please see the Report Charts section of this document.

- **Employee Perspectives** - Under the Employee Perspectives menu are options for managers to view a perspectives category or a Perspectives score for their employees in read-only format.

- **Performance** – Under this menu are manager options for Performance Development, Performance Reviews and Performance Reviews Finalize.

- **Succession Planning** – This menu gives managers access to read-only access of Succession Plans involving their employees. A sub-menu for Dashboard sends the user to a Succession Dashboard that allows the user to bring in their succession visuals via charts.

- **Reports** – This menu contains reports related to the menu options available under the Talent menu such as Detailed Points Report, Points History Report, Performance Reviews Report and Succession Plans.
Learning Menu

Under the Learning menu are read-only pages for managers and include options to view and/or create a dashboard, viewing of a manager’s employees’ credentials, trainings, certifications, education and then read-only reports related to this menu.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to HR/Learning functionality. For more information about these charts, please see the Report Charts section of this document.

- **Credentials** – This menu allows managers to view and edit access their employees’ assigned credentials, such as driver’s license and passport.

- **Trainings/Certifications** – This menu allows managers to view in view and edit their employees’ training courses and certifications.

- **Education** – This menu allows managers to view and edit their employees’ record of education and degrees.

- **Skills** – This menu allows managers to view in read-only the skills for their employees.
Compensation Menu
Under the Compensation menu are read-only pages for managers and include options to view and/or create a dashboard, viewing of a manager’s employees’ compensation budgets, worksheets, proposals and then read-only reports related to this menu.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to employee compensation functionality. For more information about these charts, please see the Report Charts section of this document.

- **Budget** – This menu gives managers access of compensation budgets assigned to their employees.

- **Worksheet** - This menu gives managers access of compensation worksheets assigned to their employees.

- **Proposals** - This menu gives managers access of compensation proposals assigned to their employees.

- **Proposals To Finalize** - This menu gives managers access to finalized compensation proposals assigned to their employees.

- **Reports** – This menu contains reports related to the Compensation module. The Proposal Status report shows the status of proposals and will display Submitted, Approved and Finalized Proposals assigned to their employees.
Recruitment Menu
Under the Recruitment menu are the dashboard options where users can view and create report charts. Other options include pages for job requisitions, applicants and reports.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to HR and recruitment functionality. For more information about these charts, please see the Report Charts section of this document.

- **Job Requisitions** – This menu gives managers access to job requisitions active in the system where they can be viewed, copied, or deleted. New requisitions can also be added. When adding a new job requisition, general information will be entered, followed by sections you can complete.

  If you post job openings on EQuest, options are available to post to jobs to this third-party Marketplace product. These can be posted to the free EQuest job boards or the Advantage Network.

- **Candidates** – This menu gives managers access to information pertaining to job candidates. Options under this menu include Applicants, Applicant Interviews, Applicant Questionnaire Answers and Job Applications.
  - The **Applicants** menu allows for viewing and emailing of applicants.
  - The **Applicant Interviews** menu allows for viewing of interviews documented for applicants.
  - The **Applicant Questionnaire Answers** menu allows for viewing of interviews documented for applicants.
  - The **Job Applications** menu allows for viewing job requisitions, job applications, or applicants; deleting job applicants, emailing, and updating hiring stages.

- **Pre-boarding** – This menu gives managers access to information pertaining to menu options that are typically done prior to hiring an applicant. These options include Applicant Checklists and Background Checks – Easy Backgrounds (this is a third-party Marketplace product and is not native to the application.)

- **Reports** – This menu contains reports related to the recruitment process, such as Time to Hire.

- **Forms** – Lists options for Other Forms and All Forms. These are typically government forms.
Payroll Menu

Under the Payroll menu are pages that managers can view and includes dashboards, payroll processing, employee payroll maintenance, forms, year-end processes and reports.

- **Dashboard** - This menu allows graphical Report Charts to be created, typically in relation to payroll functionality. For more information about these charts, please see the Report Charts section of this document.

- **Process Payroll** – This menu gives managers access to the payroll batches that have been run affecting their EIN.

- **Employee Payroll Maintenance** – This menu option contains pages where managers can view their employees’ payroll information such as Direct Deposits, Deductions, Earnings and Taxes.

- **Forms** – This menu gives managers access to pages for their employees’ tax forms such as 1099s, W2s, Withholding and IRS Form 8027.

- **Advanced Payroll** – This menu gives managers access to pages for the employees’ pay periods. These options include Pay Periods, Pay Periods By Employee and View By Employee.

- **Quarter Year End Process** – This menu gives managers access to pages for payroll year end processes for Company Tax Quarters and Company Tax Years and will show the status of each.

- **Reports** - Under this menu are payroll related reports such as Payroll Funding, Post Payroll Reporting, Pay History, Labor Distribution, Taxes and Miscellaneous.