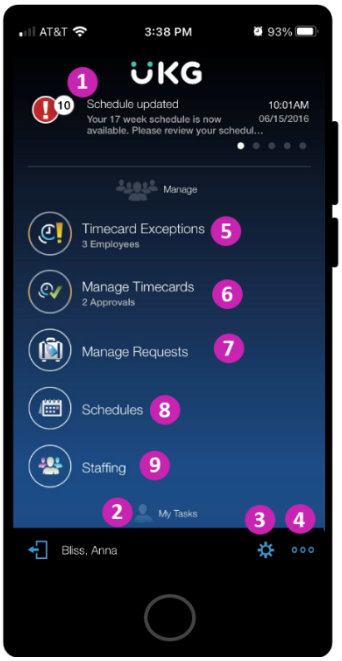
Perform Manager Tasks (iPhone®) Learner Guide

Home Screen Overview

Logging on

When you start the UKG Workforce Mobile app, your device connects to your organization's UKG Workforce Central server, using an IP address you supply. You can then log in using your existing UKG Workforce Central credentials.



1. **Alerts** - If there are matters requiring your attention, they will appear as alerts. Tap the Alerts icon to view all your alerts.
2. **Tasks** - Simply tap a task to drill down and view its details. Scroll down to access more tasks. Depending on your role, some tasks may not be accessible.
3. **Context** - Tap to change the Time Period you are viewing. All information you view will be in this context until you change it.
4. **More Options** - Tap to access additional options, such as Refresh, which update the screen with the latest data from the server. It's a good idea to refresh after making edits.
5. **Timecard Exceptions** – Tap to view your employees whose timecards have issues you need to address.

6. **Manage Timecards** – Tap to review and adjust your employees' timecards.
7. **Manage Requests** – Tap to review and respond to requests made by your employees.
8. **Schedules** – Tap to view and update your employees' schedules.
9. **Staffing** – Tap to view and adjust staffing.

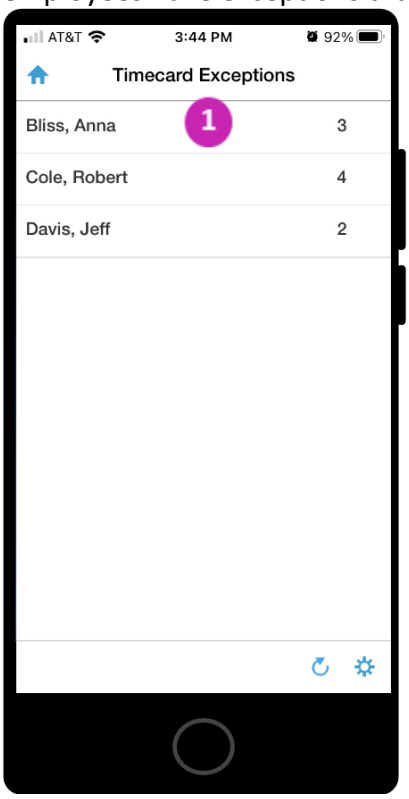
Get the app

Anyone can download and try out the UKG Mobile app—check your device's app store to get it. To log into your organization's server, however, you must be granted access.

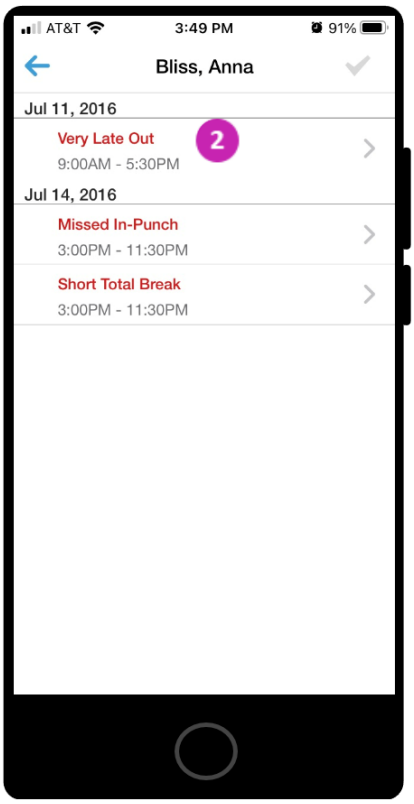
Manage Timecard Exceptions

Marking Exceptions as Reviewed:
Some exception types cannot be resolved in UKG Workforce Mobile but must instead be resolved from your computer. In this case, you may have the option to tap Reviewed to mark the exception as reviewed. Exceptions are removed from the list when they are either resolved or marked reviewed.

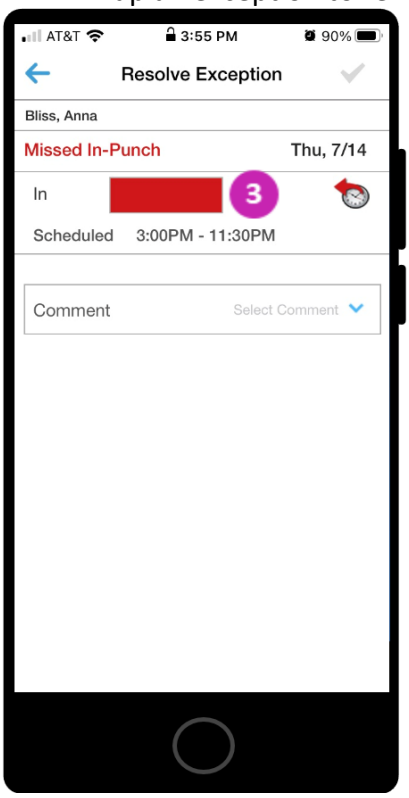
On the home screen, tap **Timecard Exceptions**. (Labeled as #5 on the Home Screen Overview.)
Timecard Exceptions Count: The count under **Timecard Exceptions** tells you how many employees have exceptions that need your review.



1. Tap a name to view that employee's exceptions. **Exceptions Count:** The number next to each employee's name tells you how many unresolved exceptions that employee has.



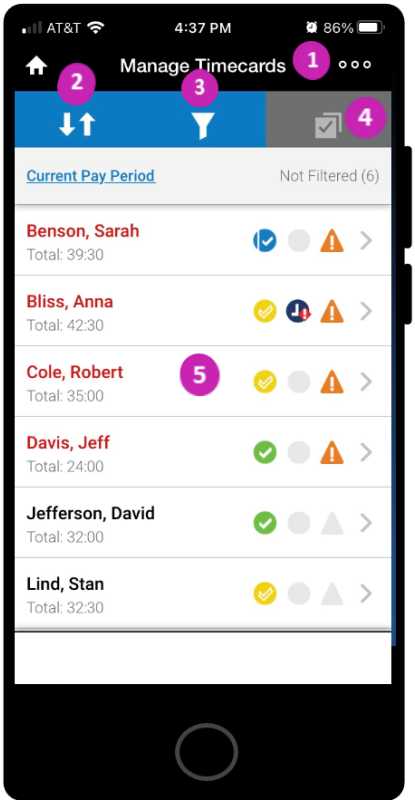
2. Tap an exception to review the details.



3. Your options for correcting the punch depend on the type of exception. In this example, you can manually enter a time, or tap the icon to enter the scheduled punch time.

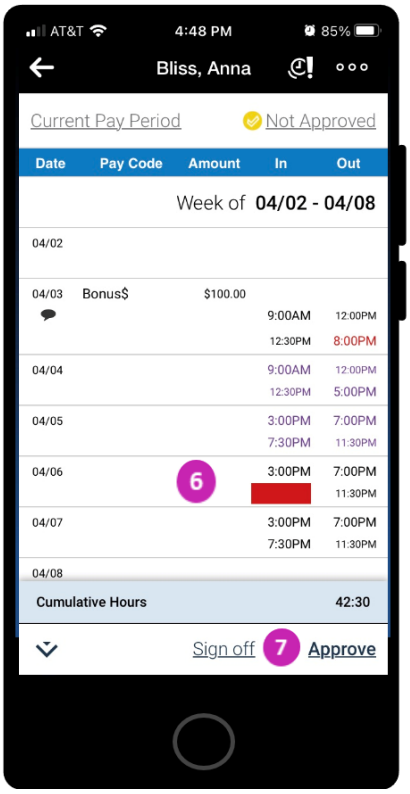
Manage Timecards

On the home screen, tap **Manage Timecards**. (Labeled as #6 on the Home Screen Overview.)
Approval Count: The count under Manage Timecards tells you how many employees have approved their own Timecards.



1. **More Options** - Tap to access a menu of additional options. Tap **Refresh** to retrieve the most current data from the database. Tap **Hyperfind** to select a specific group of employees to view. Tap **Legend** to see what each of the informational icons mean.
2. **Sorting Options** – Tap to sort the list of employees by the criteria you specify. **Name** sorts the list alphabetically. **Exception** moves employees whose timecards have exceptions to the top. **Overtime Rule Violation** moves employees with violations to the top. **Employee Approved** moves employees who have approved their own timecards to the top.
3. **Filter Option** – Tap to filter by several criteria, for example, Employee Not Approved, Manager Not approved, or Signed-off.
4. **Selective Approval** – As an alternative to approving one timecard at a time, tap here to enter a mode in which you can select multiple timecards for approval. Then tap **Approve**.

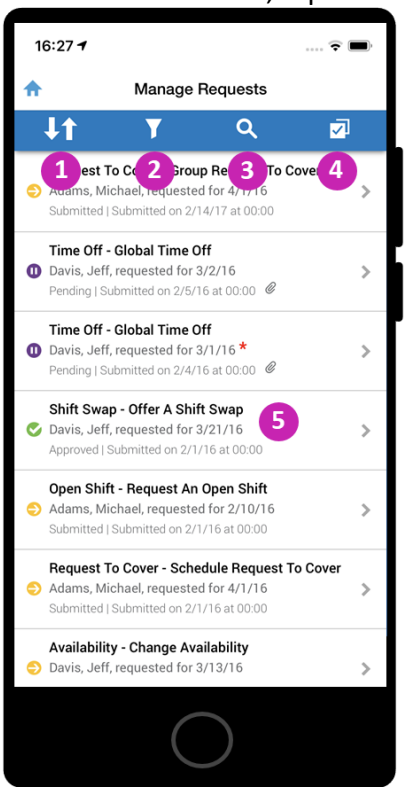
5. **Timecard Details** - Tap a name to view that employee's timecard (and approve it individually if you choose.



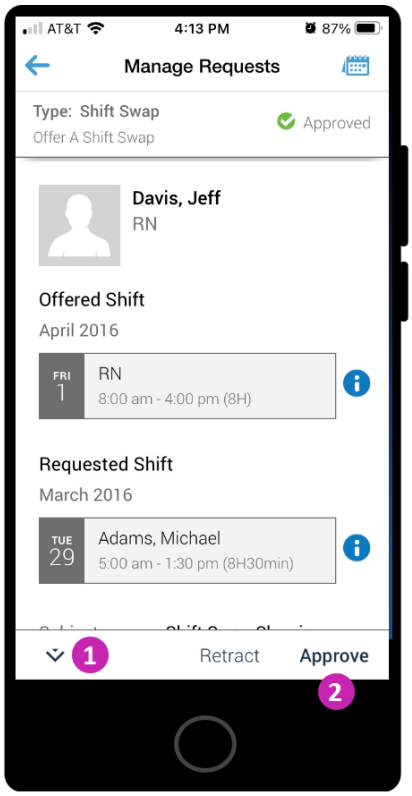
6. **Add or Edit** – While viewing a timecard's details, tap a punch or pay code to edit it, or tap a date to add a punch or pay code to that date.
7. **Approval** – Once the timecard has been reviewed, tap **Approve**.

Manage Requests

On the home screen, tap **Manage Requests**. (Labeled as #7 on the Home Screen Overview.)



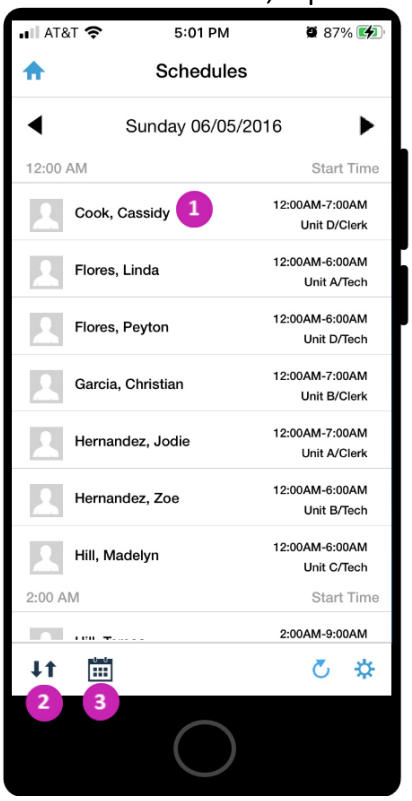
1. **Sort Requests** – Tap to alternate between sorting request by most recent or least recent submission date.
2. **Filter Requests** – Tap to enter a set of criteria, then tap **Apply**. Only requests meeting your criteria will appear in the list. Sort on a specific range of Request or Submit dates, on a specific type of request (Time Off, Request to Cover, etc.) and/or a specific Status (Pending, Submitted, etc.).
3. **Search** – If the list of requests is overly long, you can tap here and start entering text to search on. The list of requests will narrow as you type.
4. **Selective Approval/Rejections** – As an alternative to approving or rejecting one request at a time, tap here to enter a mode in which you can select multiple requests of the same type for action. Then tap an action to apply that action to all selected requests.
5. Select a request from the list to view its details.



1. **Additional Options** - Tap to see additional actions you can take, such as adding comments to the request.
2. Review the details of the request. Your available actions will appear at the bottom of the request. The actions you can take depend on the type of request being reviewed.

View Schedules

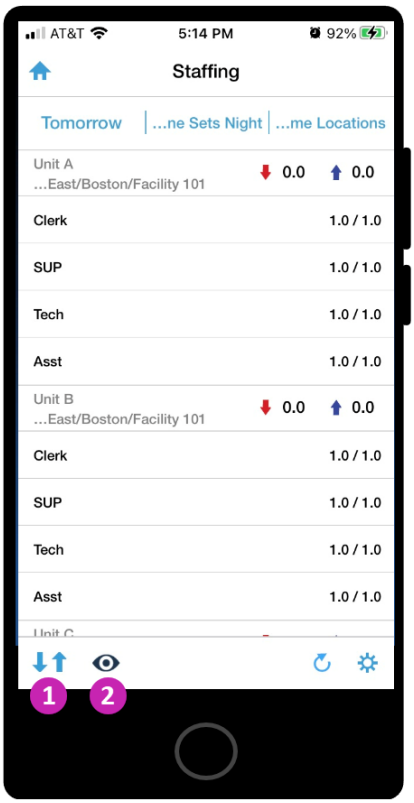
On the home screen, tap **Schedules**. (Labeled as #8 on the Home Screen Overview.)



1. **Schedule Details** - Tap a date in the list or calendar to view the details of a shift or time off.
2. **Sort Order** – Tap to sort the schedules by Start Time, End Time, or Job.
3. **List/Calendar Toggle** - Tap to switch between a list view (pictured here) and a calendar view. In the calendar, selecting a date indicates the number of shifts scheduled for that date.

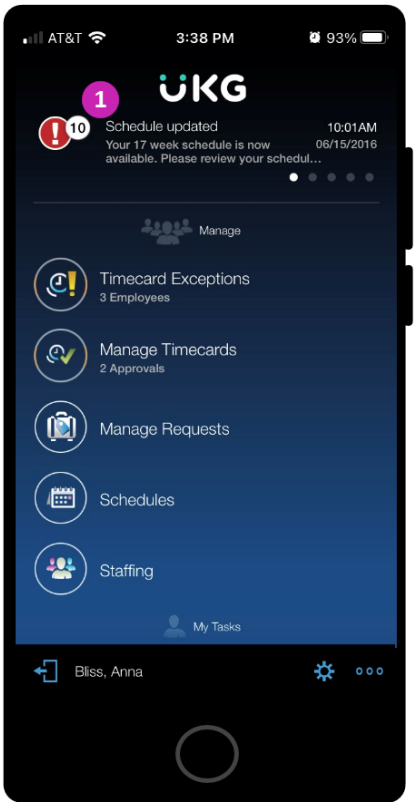
Manage Staffing

On the home screen, tap **Staffing**. (Labeled as #9 on the Home Screen Overview.)
Staffing Details – Tap a location in the list to view details of the staffing.



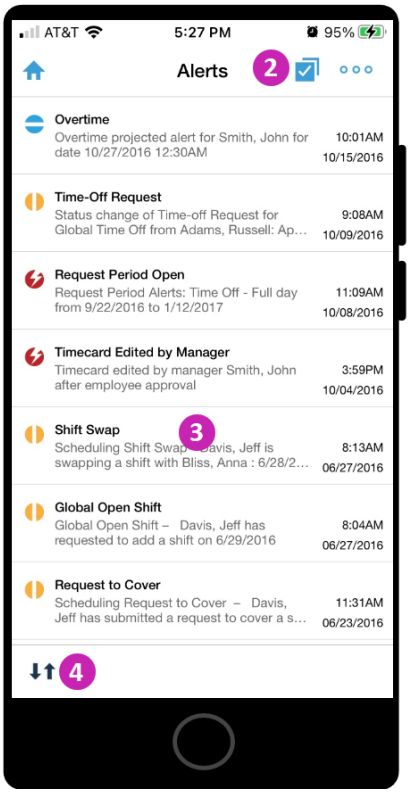
1. **Sort Order** - Tap to sort the jobs by Location or by Unit.
2. **Coverage** - Open the view selector to display coverage as Variants or as Counts.

Respond to Alerts



On the home screen, tap the Alerts icon. (Labeled as #1 on the Home Screen Overview.)

1. **Alert Count** - The count next to the Alerts icon indicates how many alerts you have.



2. **Edit** - Tap when you are done reviewing some or all your alerts. You can then either Delete All, or select individual alerts and tap **Delete**.
3. **Alert Details** - Tap an alert to view its details. Depending on the type of alert, you may be presented with options for responding to the alert, or for opening another part of the app for further action.
4. **Sort Toggle** – Tap to sort the alerts by Time received or by Priority.

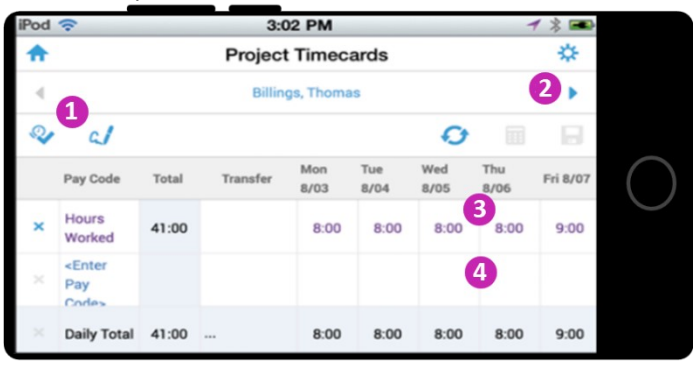
Alert Icons Legend:

- Low priority notifications are marked by a yellow circle with a vertical line .
- Medium priority notifications are marked by a blue circle with a horizontal line .
- High priority notifications are marked by a red circle with a lightning bolt in it .

Manage Project Timecards

Landscape Mode
When managing Project Timecards, you will probably find that rotating your mobile device to enter landscape mode provides a more suitable working area.

On the home screen, tap **Manage Timecards**. (Labeled as step #6 on the Home Screen Overview.)



1. **Approve** or **Signoff** - Tap these icons to approve or sign off on the timecard (or remove an approval).
2. **Move through employees** - Tap the arrow to move to the next employee's timecard.
3. **View an Entry** - Tap a duration or pay code amount to view its details. **Add a Comment or a Note** – Tap to add a comment and/or note to the pay code amount. Comments are chosen from a pre-defined list, while Notes provide a text entry field where you can type anything you wish. **Modifying the Entry** – Tap the pencil icon to edit the entry you are viewing.
4. **Add a New Entry** - Tap a cell corresponding to the date for which you want to enter an amount. Then use the pay code entry screen to select the Pay Code and Amount and, if applicable, job or account for a transfer.

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