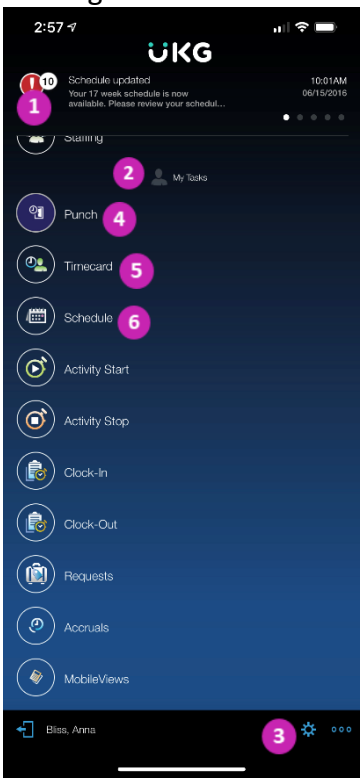
Perform Employee Tasks (iPhone®) Learner Guide

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.



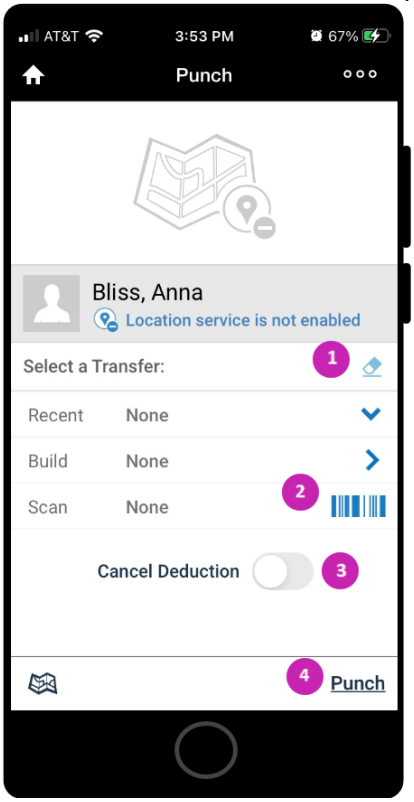
1. **Alerts** - If there are matters requiring your attention, they will appear as alerts. Tap the Alerts icon to view all your alerts.
2. **Tasks** - Simply tap a task to drill down and view its details. Scroll down to access more tasks. Depending on your role, some tasks may not be accessible.
3. **Context** - Tap to change the Time Period you are viewing. All information you view will be in this context until you change it.

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.

Punch In or Out

4. On the home screen, tap the **Punch** icon. (Labeled as #4 on the Home Screen Overview.)



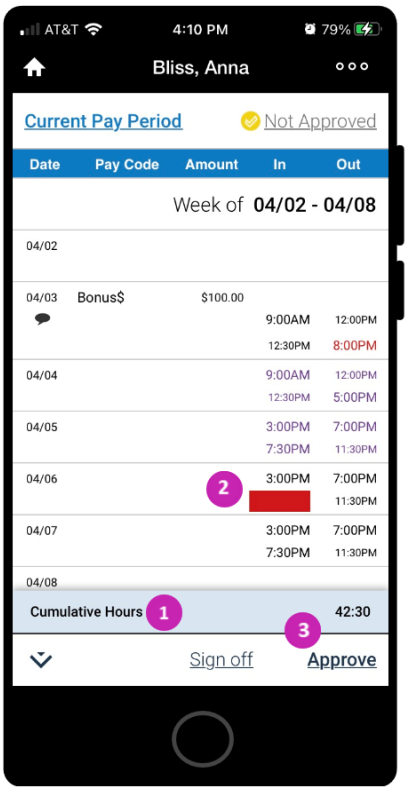
1. If you are starting a shift requiring a transfer, select Transfer. Otherwise, skip to Step #5. Select a transfer type, select details, and tap **Done**. **When to Make a Transfer** - Normally, you should only enter a transfer when your manager is aware that you will be making one. Select the transfer only when punching In for the transfer; do not select the transfer again when punching Out. Your device may recognize your geographical location and limit your transfer options based on that location.
2. **Barcode** - If you are working at a location with a barcode for starting and stopping jobs, you can punch by tapping here and scanning the code.
3. If you are working without a break, tap to enable Cancel Deduction. **When to cancel a deduction** – Normally, you should only cancel a deduction when your manager has given you approval to do so. Only cancel the deduction when punching Out at the end of your shift, unless your manager has instructed you to do otherwise.
4. To enter the punch, tap **Punch**.

View or Edit Your Timecard

On the home screen, select **Timecard**. (Labeled as #5 on the Home Screen Overview.)

Hourly Timecard

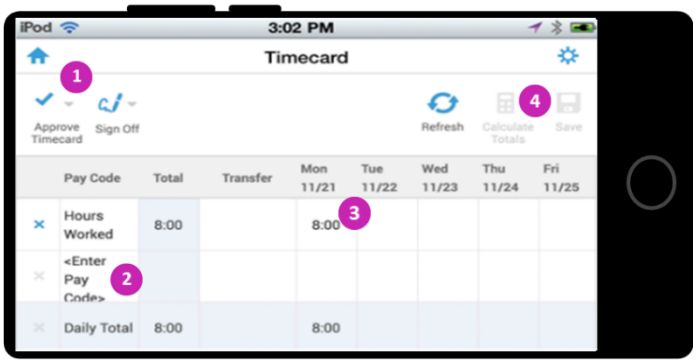
If you are an Hourly employee, you will see a timecard with In and Out punches (pictured below).



1. **Timecard Totals** - Tap to view a summary of the types of hours you have worked.
2. **Add or Edit Time** - If you have the necessary permissions, tap a punch or pay code to edit it, or tap a date to add a punch or pay code to that date.
3. **Timecard Approval** - Tap to approve your timecard hours. Your manager will let you know how frequently you should approve them.

Project/Salaried Timecard

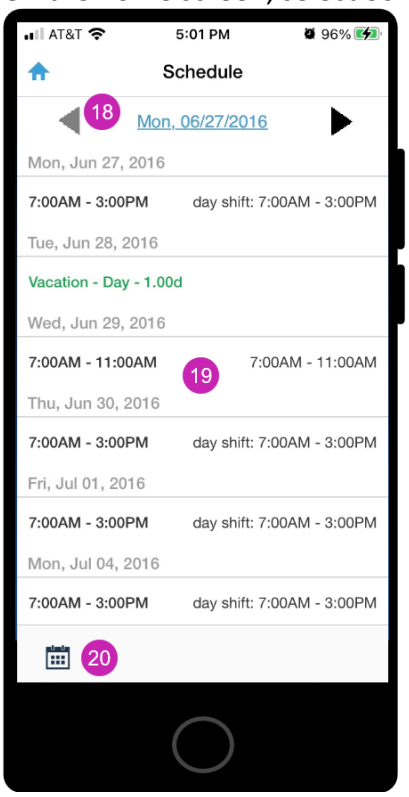
If you are a project/salaried employee, you will see a timecard with data rows (pictured below).



1. **Timecard Approval** – Tap to approve your timecard hours. Your manager will let you know how frequently you should approve them.
2. If the type of hours you want does not have a row, tap **<Enter Pay Code>** to select a Pay Code and create a new row, then tap a cell in the new row.
3. To add time to a particular date, tap the cell on the row representing the type of hours you want to enter. After confirming that the Date and Pay Code is correct, tap **Edit**. Tap the **Amount** field and enter the amount as hours:minutes. Then tap **OK**.
4. Confirm that the new amount is correct, and then tap **Save**.

View Your Schedule

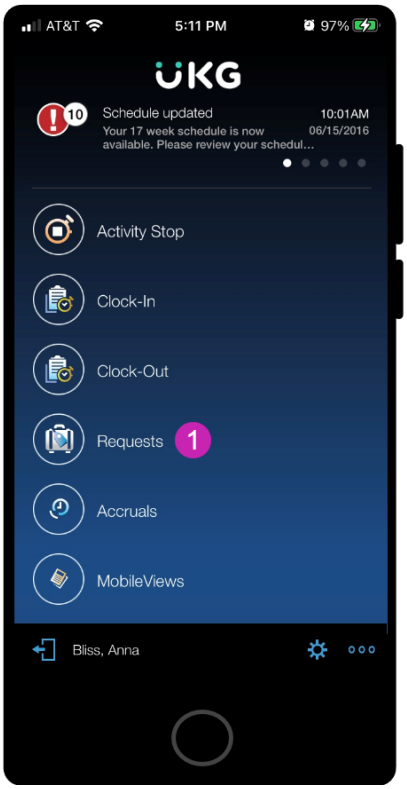
On the home screen, select **Schedule**. (Labeled as #6 on the Home Screen Overview.)



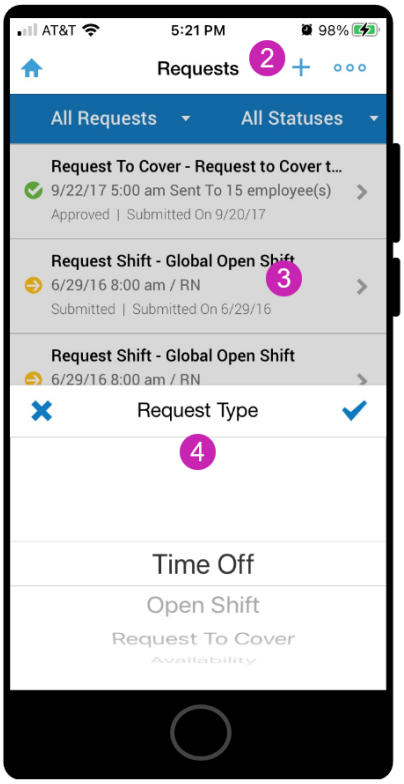
1. **Date Range** – Tap an arrow to change the dates you are viewing.
2. **Schedule Details** - Tap a date in the list or calendar to view the details of a shift or time off.
3. **Schedule Calendar Toggle** - Tap to switch between a list view (pictured here) and a calendar view. In the calendar, dates with dots have a scheduled shift or time off.

Start a New Request

There are several types of requests you can submit to your manager. All are handled from the Requests screen. The specifics of each type of request are described in the “Complete a…” sections on the following pages.

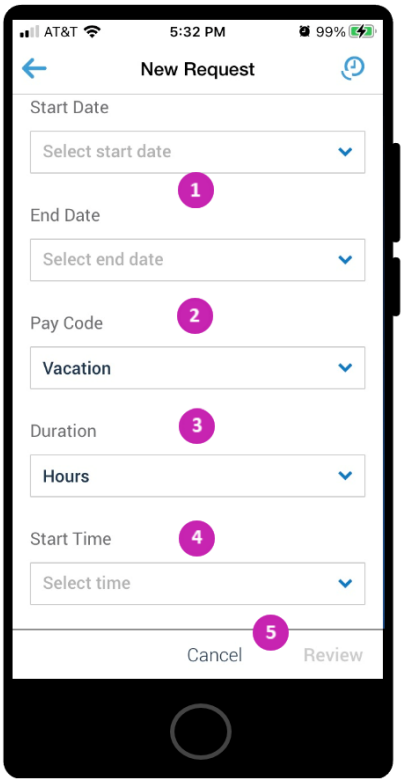


1. On the home screen, select **Requests**.

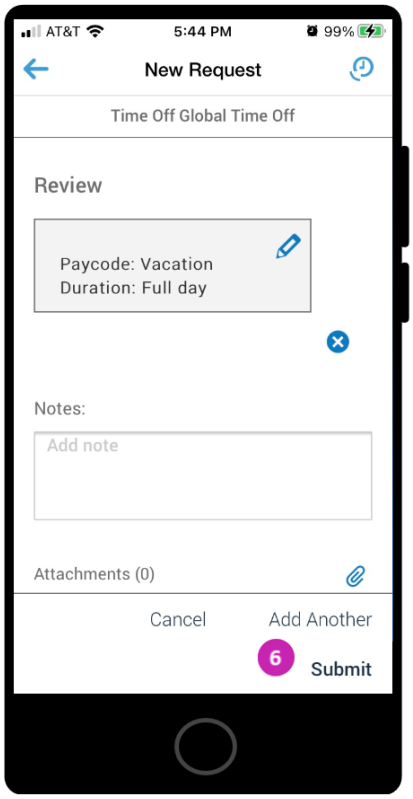


2. Tap the **+** to add a new request.
3. **Prior Requests** - To view the details of a previously- submitted request, simply select it from the list of requests. The details screen also gives you the option to completely retract the request you are viewing.
4. Select the type of request you want to make. (Instructions for each Request type are covered in subsequent sections.)

Complete a Time-off Request



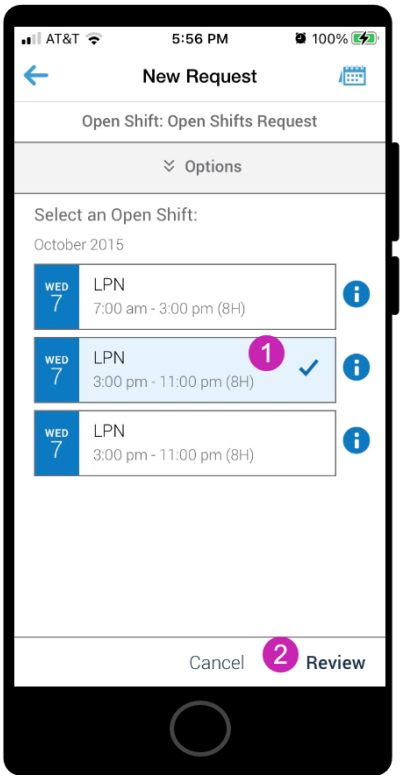
1. Enter a Start Date and End Date for the time off. (If you are only taking one day off the Start Date and End Date will be the same.)
2. If prompted, select a Pay Code. (Check with your manager if you are not sure which to select.)
3. Select a Duration for the time off. This is the number of scheduled shift hours you will not be working. If you will be taking off an entire shift each day, select Full day, tap **Review**, and skip to Step 10. If you will be taking off only half a shift each day, select Half day, tap **Review**, and skip to Step 10. Otherwise select Hours and continue.
4. If you selected Hours for the Duration, enter a Start Time and Length. For example, if you are scheduled to work 8:00am to 5:00pm and you want to take 8:00am to 11:00 off, enter 8:00am for Start Time and 3:00 for Length.
5. Then tap **Review**.



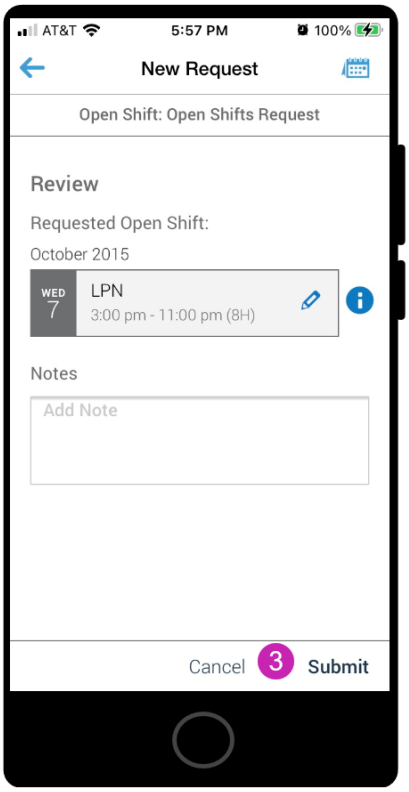
6. Review the summary of the request for accuracy. (If you need to start over tap **Cancel**.) You can enter a textual Note if you would like; your manager will see this note. If the details of the request are accurate, tap **Submit** to send the request to your manager.

Check Your Accruals Balances:
Before submitting a new Time-off Request, it's a good idea to tap **Accruals** on the home screen to review your balances. Tap **Balances as of** to see the hours you will have on any given date.

Complete an Open Shift Request

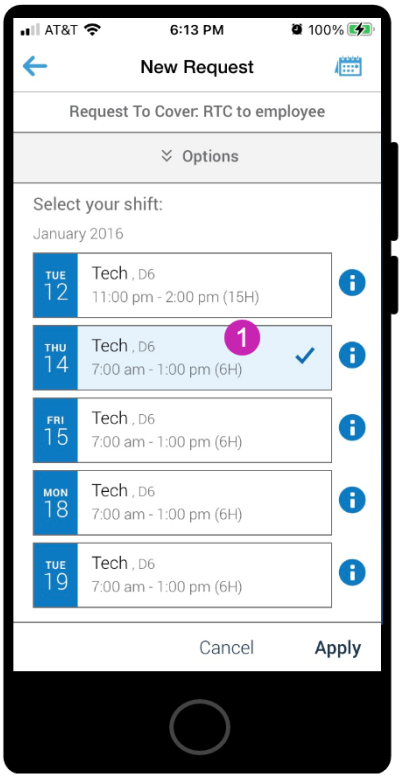


1. Select the shift you want to work. (Tap the calendar icon if you need to change the range of dates first.)
2. Tap **Review**.

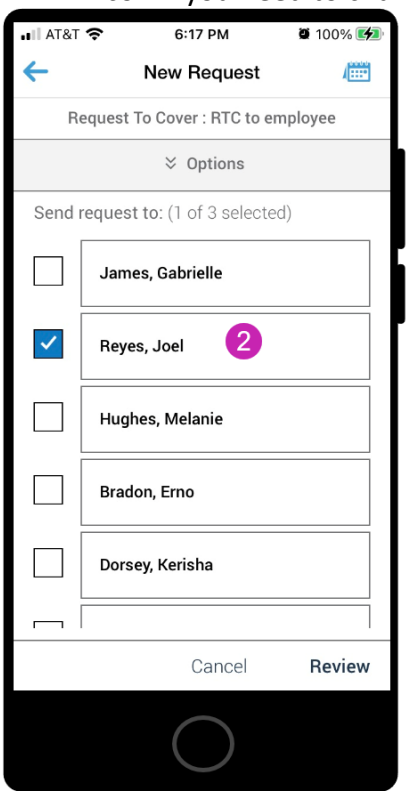


3. Review the request for accuracy. You can add a note to your manager if you wish. If the request is accurate, tap **Submit** to send it to your manager.

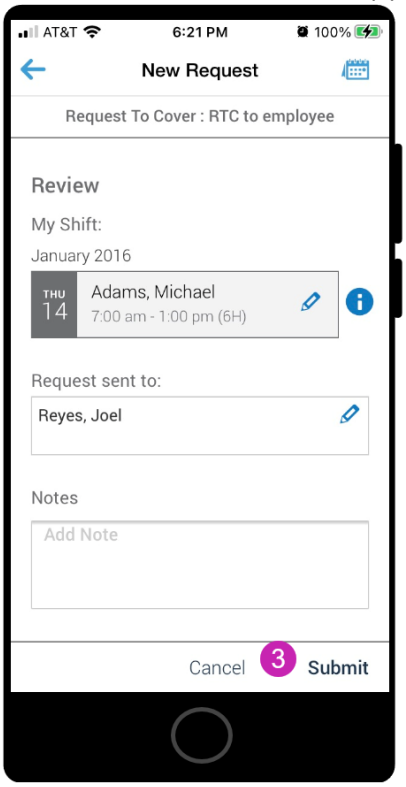
Complete a Request to Cover Request



1. Select the shift that you need someone else to cover and tap **Apply**. (Tap the calendar icon if you need to change the range of dates first.)

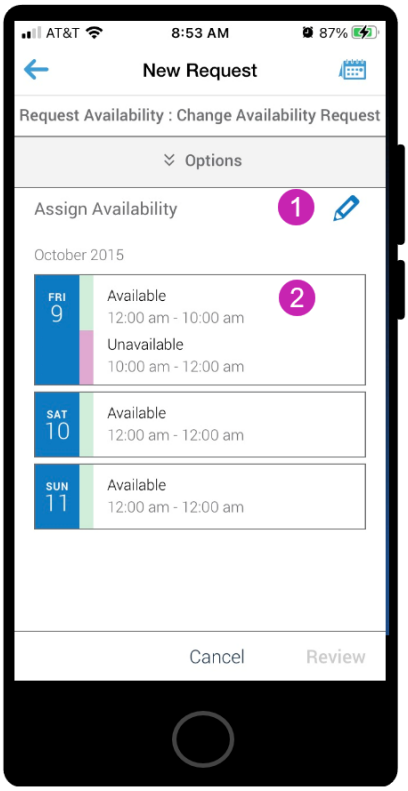


2. Select the co-worker(s) you would like to invite to cover your shift. Tap **Review**.

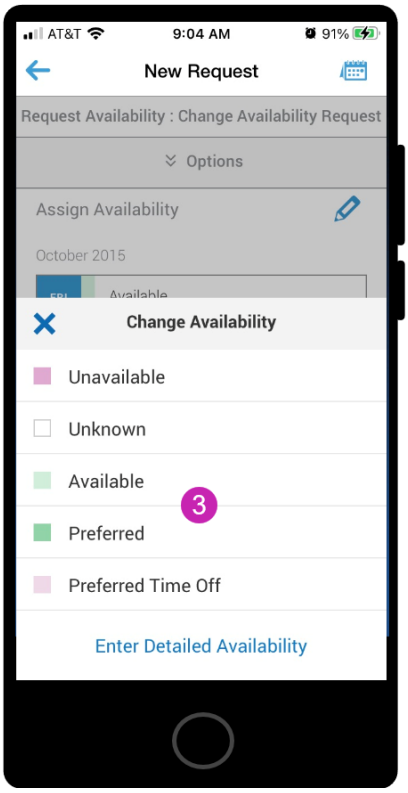


3. Review the request for accuracy. You can include a note to the selected co-workers. If the request is accurate, tap **Submit** to send it to the selected co-workers.

Complete a Change of Availability Request

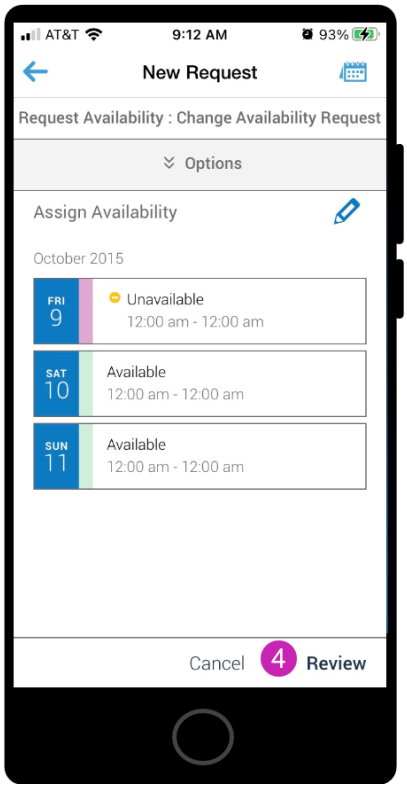


1. Select a date for which you want to change availability. (Tap the calendar icon if you need to change the range of dates first.) Note that tapping the pencil icon lets you select multiple dates. Select the dates and tap **Set Availability**. Then tap the **X** to return to the list of dates. In this case any changes you make will apply to all of the selected dates.
2. **Current Availability** – Your current availability is shown for each displayed date.

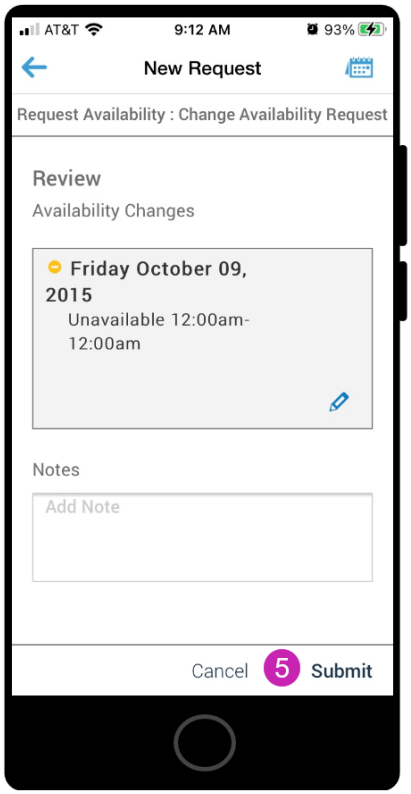


3. To apply one availability type to the entire day, simply select the availability type and skip to Step 4. Otherwise, tap **Enter Detailed Availability**.

To enter detailed availability, select a start and stop time for the first period, then select the availability type for that period. Then tap **Add Period** to add another availability period to the day and supply the new period's details. When you have added all of the periods needed to accurately represent your availability for the day, tap **Apply**.

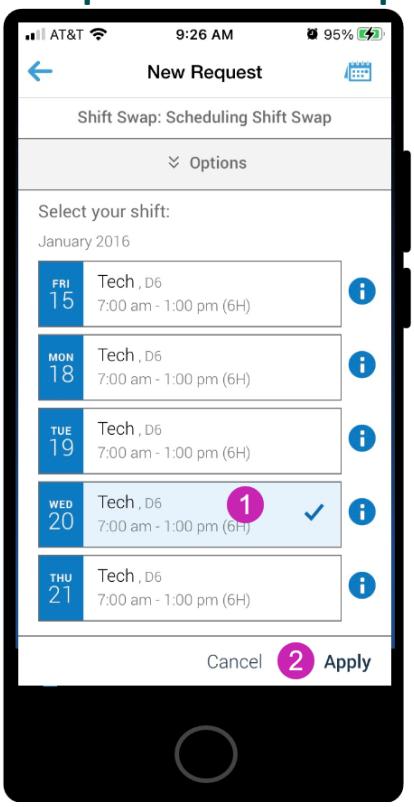


4. If you need to change availability for other visible dates, repeat the above steps. When all visible dates accurately represent your availability, tap **Review**.

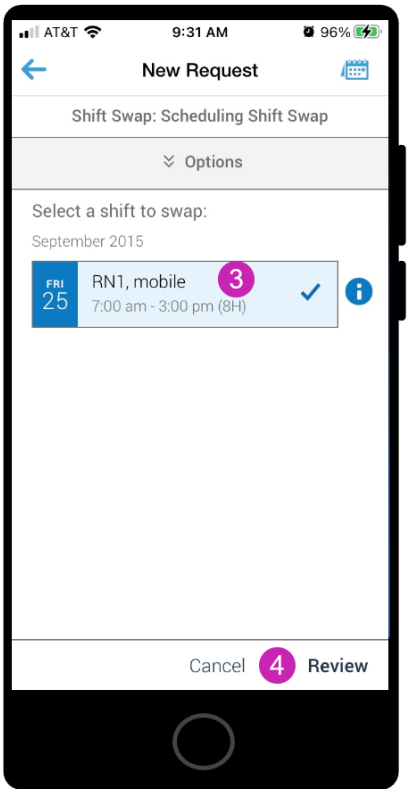


5. Review the summary of the request for accuracy. (If you need to start over tap **Cancel**.) You can enter a textual Note if you would like; your manager will see this note. If the details of the request are accurate, tap **Submit** to send the request to your manager.

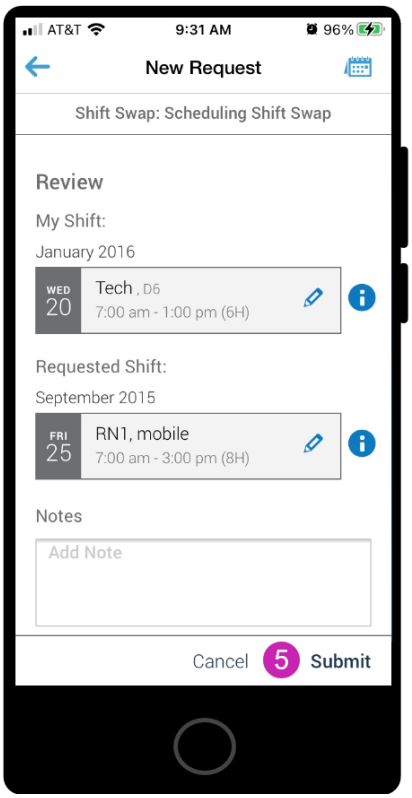
Complete a Shift Swap Request



1. Select your shift that you want to swap. (Tap the calendar icon if you need to change the range of dates first.)
2. Tap **Apply**.



3. Select the co-worker's shift that you want to work instead of your shift. (Tap the calendar icon if you need to change the range of dates first.)
4. Tap **Review**.



5. Review the summary of the request for accuracy. (If you need to start over tap **Cancel**.) You can enter a textual Note if you would like; the co-worker working the shift will see this note. If the details of the request are accurate, tap **Submit** to send the request to your co-worker.

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