# Perform Employee Tasks Learner Guide

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. Please go here to read the agreement and obtain the server name.

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.
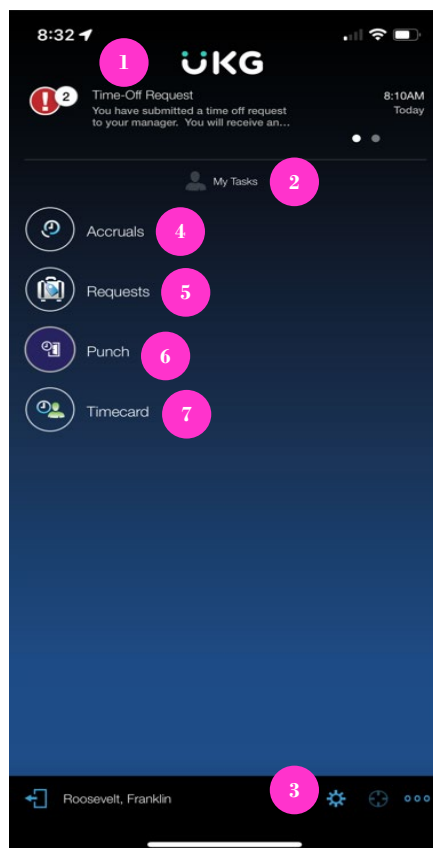
1. **Alerts** - If there are matters requiring your attention, they will appear as alerts. Tap the Alerts icon to view all your alerts.

2. **My 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. **NOTE: The position of the context can be in different locations depending on the type of phone being used.**

Accruals (Labeled as #4 on the Home Screen Overview)
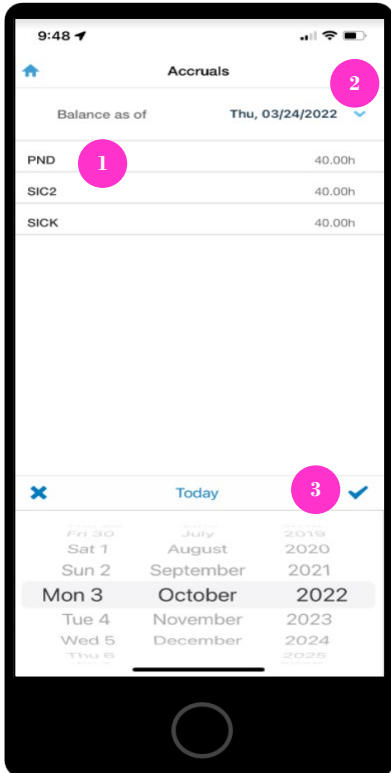
1. **Accruals** – Shows current balances as of the day you select 'Balance as of'

2. **Balance as of**- Simply tap the arrow to select a 'Balance as of' date.

3. **Selecting 'Balance as of' Date** - A roll calendar will appear at the bottom of your screen to select date. If you change the date to June 30 (the end of the fiscal year), it will show the balance as of that date and take into account all fiscal year accruals and approved time off requests.

Start a New Request (Labeled as #5 on the Home Screen Overview)

There are several types of requests you can submit to your manager. All are handled from theRequests screen. The specifics of each type of request are described in the "Complete a…" sections on the following pages.
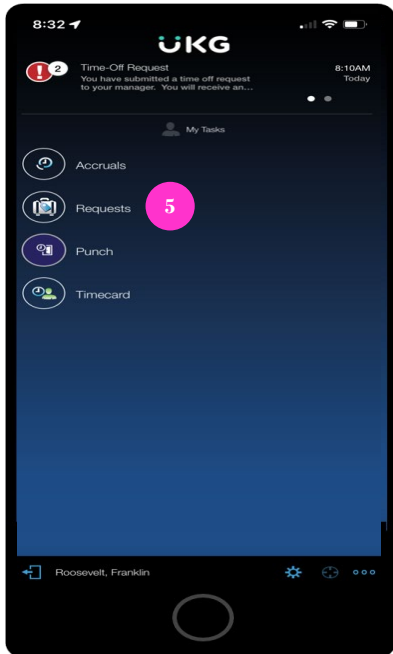
1. On the home screen, select **Requests**.
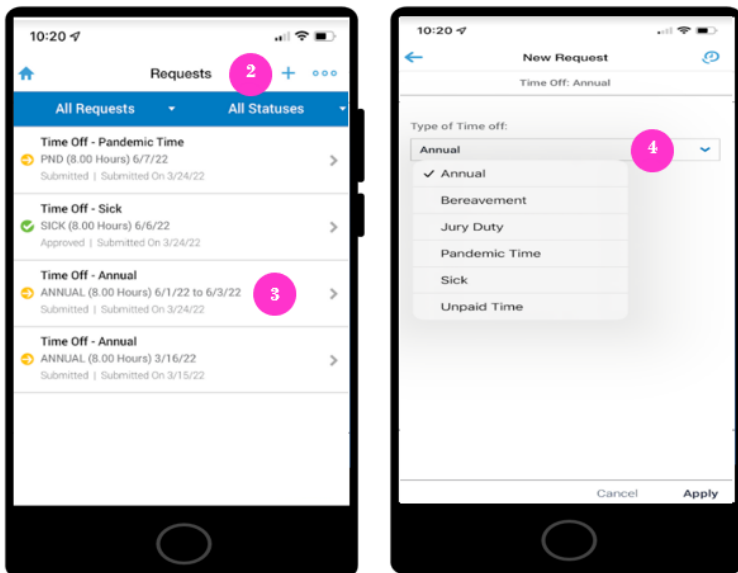
2. Tap the **+** to add a new request. <mark>NOTE: The position of this content can be in different locations depending on the type of phone being used</mark>.

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. Hours is the default setting for Duration

3. 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 for Length.

4. Then 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.

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

Punch In or Out (<mark>Only for NON-EXEMPT employees with one position</mark>)

1. On the home screen, tap the **Punch** icon. (**Labeled as #6 on the Home Screen Overview**)
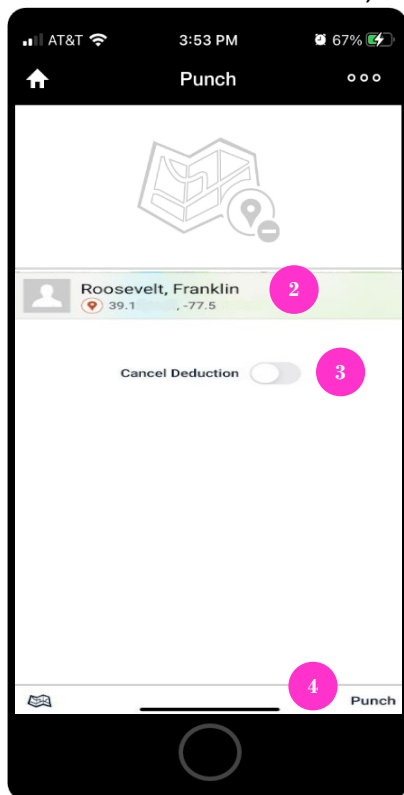

2. Your device recognizes your geographical location.

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 ofyour shift, unless your manager has instructed you to do otherwise.

4. To enter the punch, tap **Punch**.

View Your Timecard

On the home screen, select **Timecard**. (**Labeled as #7 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).
If you are monthly paid you will see time off once approved.
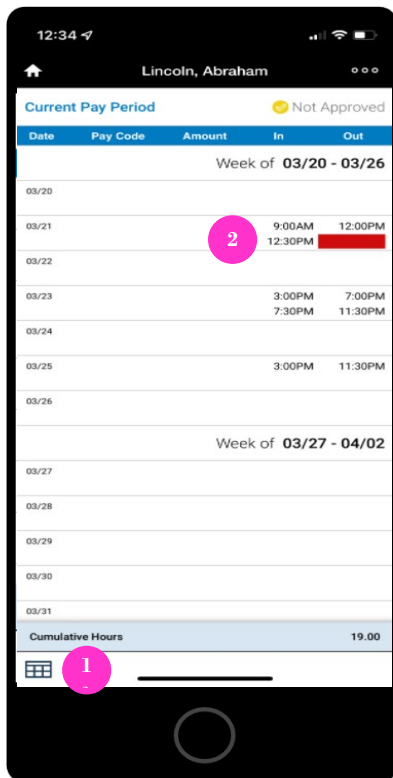
1. **Timecard Totals** - Tap to view a summary of the types of hours you have worked.

2. **View Your Time** - If you see missed punches, time recorded wrong, or missing time off please notify your manager or timekeeper

Respond to Alerts (**Labeled as #1 on the Home Screen Overview**)

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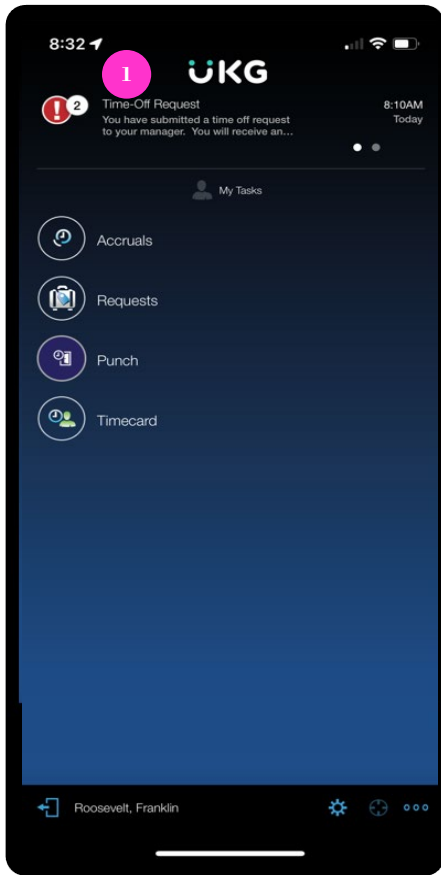
1. **Alert Count** - The count next to the Alerts icon indicates how many alerts you have.
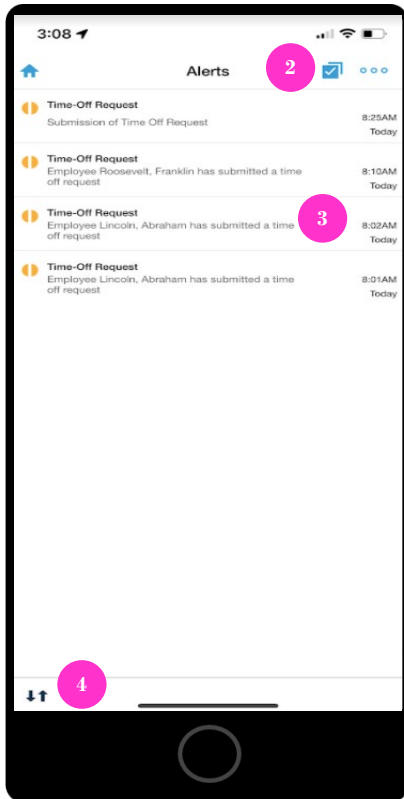
2. **Edit** - Tap when you are done reviewing some or all your alerts. **To no longer see alerts** you can then either Delete All, or select individual alerts and tap **Delete**.

3. **Alert Details** - Tap an alert to view its details. Depending on the type of alert, you maybe presented with options for responding to the alert, or for opening another part of the app for further action.

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.

4. **Sort Toggle** – Tap to sort the alerts by Time received or by Priority. **NOTE:** The position of the context can be in different locations depending on the type of phone being used.