Employee
HCMToGo Mobile User Guide

Contents

HCMToGo Mobile App Overview

Mobile users can access the system from the new HCMToGo 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.

Platform	OS Version
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Downloading the HCMToGo 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.

From your desired store or Google play, search for *HCMToGo*. Download and Install the application to your device. Click below for direct link to download.
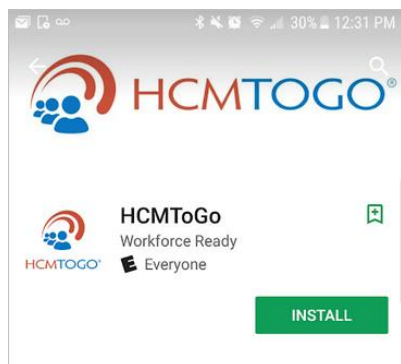
HCMToGo for iPhone
Download now >

HCMToGo for Android
Download now >

User Basics

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

Important Note: The following screen examples were taken from an iPhone. 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

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.

Log In	2:59 PM [EDT]
Username	
Password	Forgot Your Password?

LOG IN

Touch to Log In

Copyright © 2018 All Rights Reserved. v7.59 Last Update:
Aug 21 2018 6:09AM Revision: 4a458080b5f

Additional Help

Once logged in you will find additional user guides and training webinars by going to *My Info > Product Training*. From these screens, you can download short topic specific Job Aides and Interactive Video's* for additional tutorials on items in this guide and more.

- *Installing and Accessing HCMtoGo*

- *Navigating HCMtoGo*

- *Collecting time in HCMtoGo*

1. GENERAL TASKS	
	Accessing Employee Information
	Common Tasks for Managers

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.
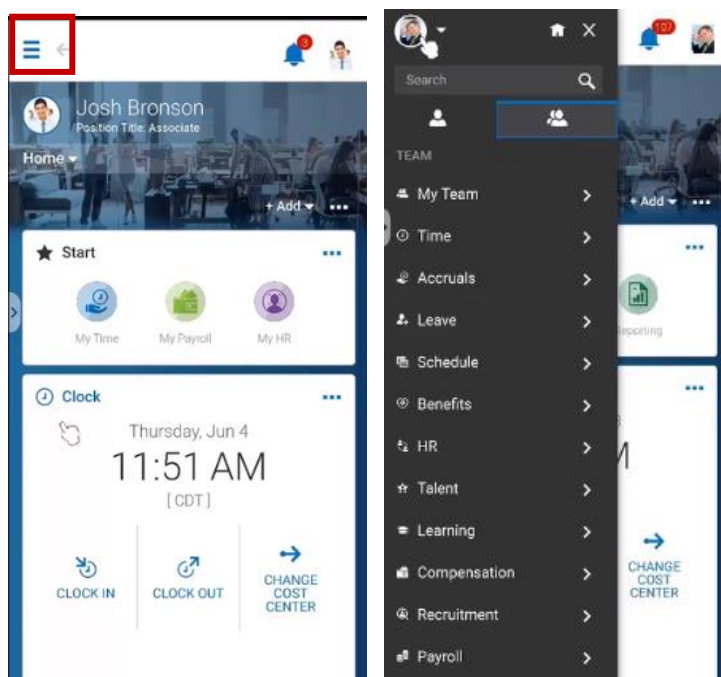

After tapping the "hamburger" menu icon, and navigating to the desired page, the menu is pinned; the next time you open the hamburger menu it automatically opens to the last selected path. In addition, if a page containing large amounts of detail is displayed, the menu path replaces the tabs at the top of the page after scrolling down.
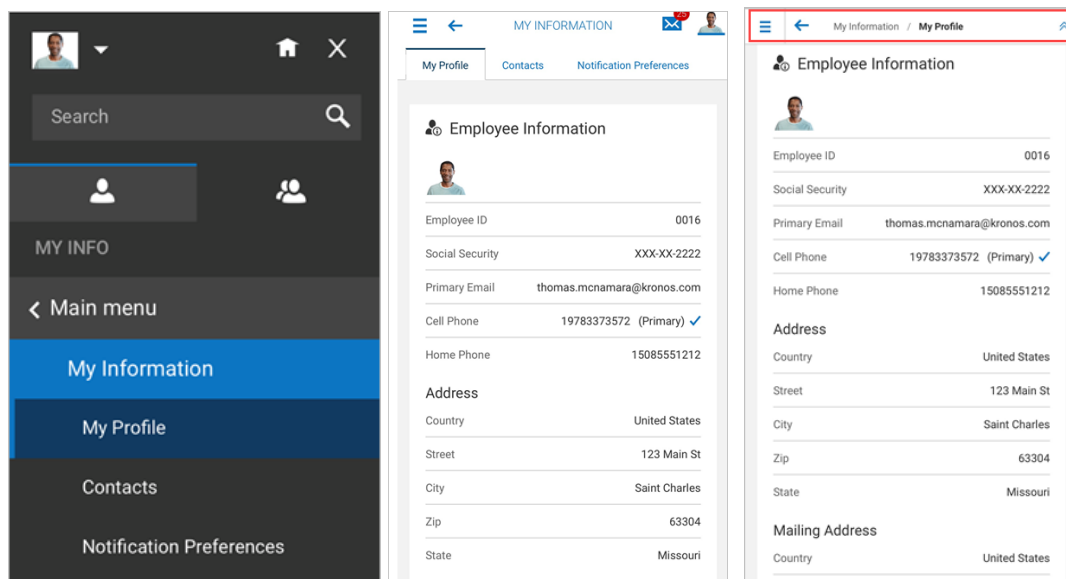
Home View & Widgets

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.
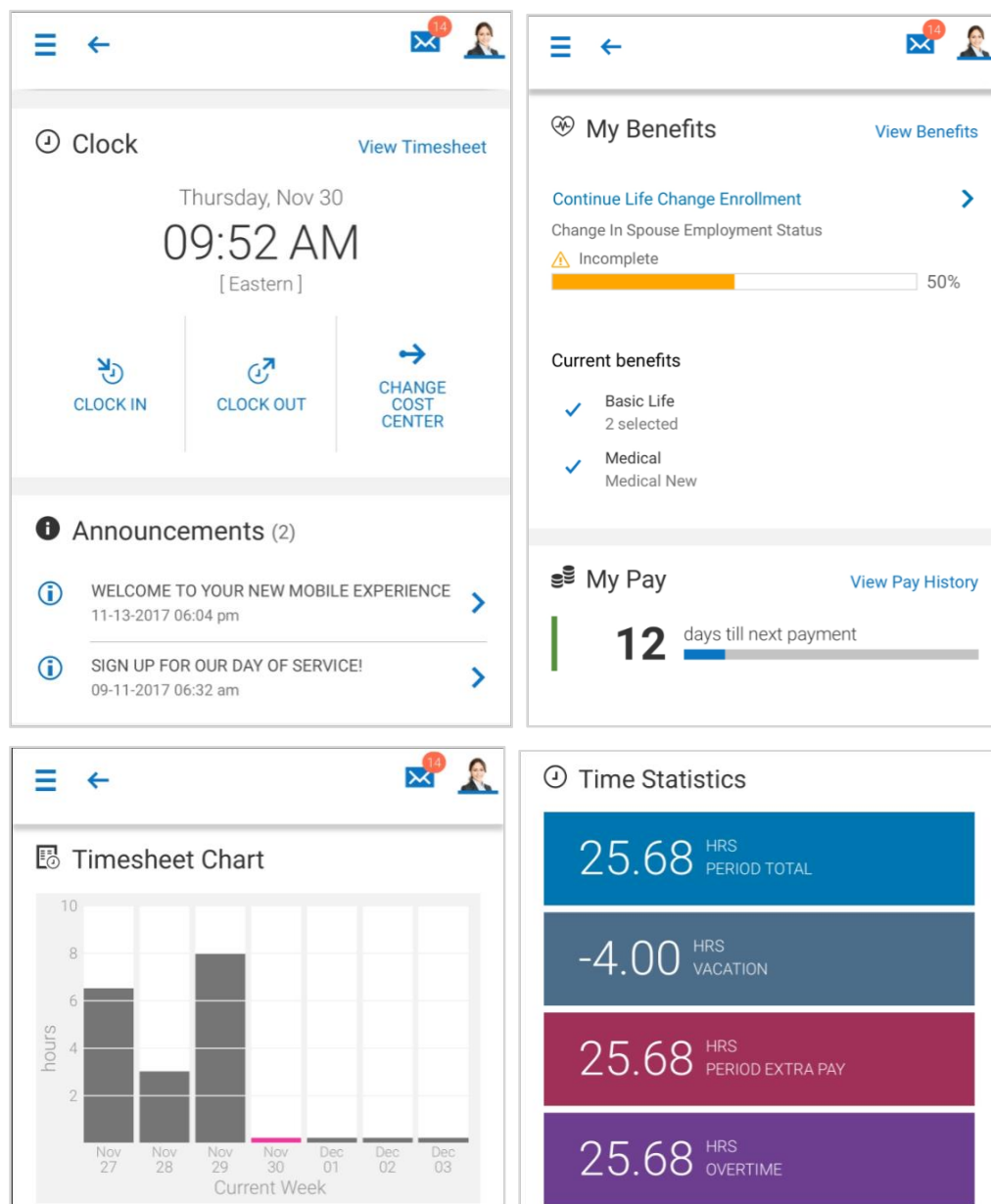
Clock

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.
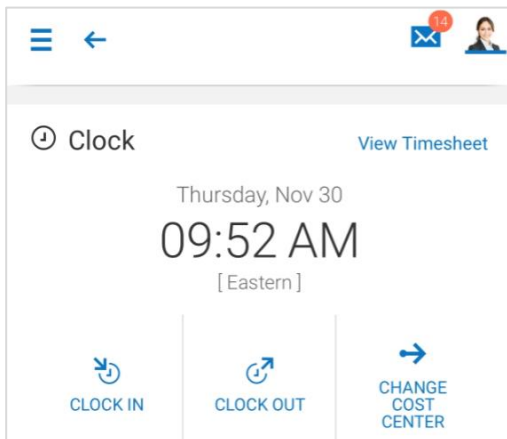
Announcements

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.
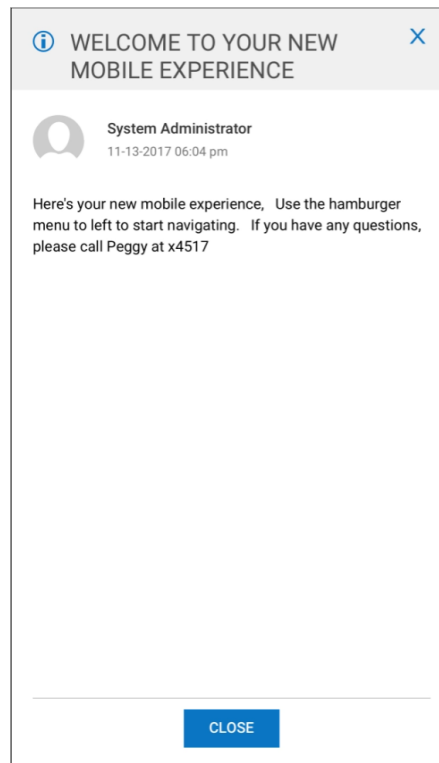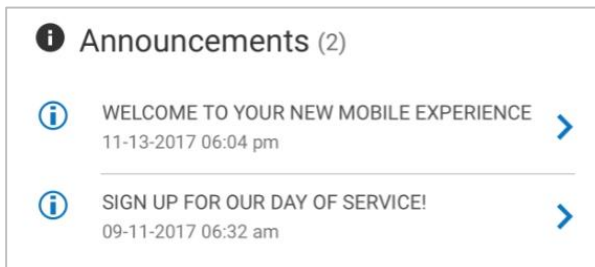
My Benefits

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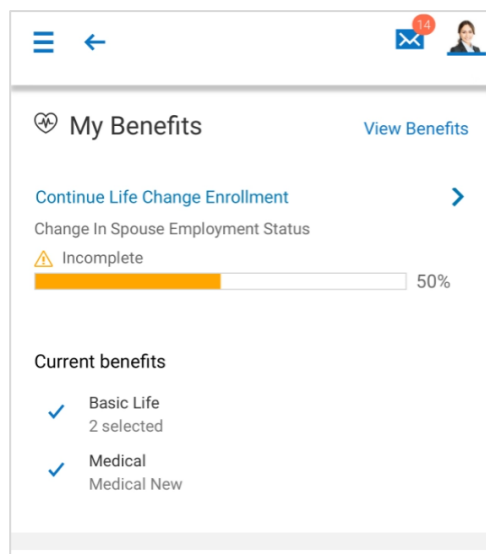
Tap the *View Benefits* hyperlink to be taken to the page containing your existing benefits and enrollments. Tap the Back arrow at the top of your session to return to the home page, one page at a time; or, you can tap the hamburger icon and tap the Home icon.
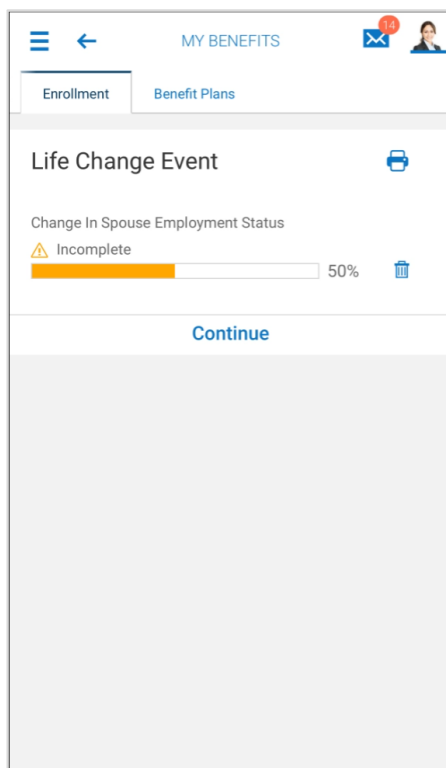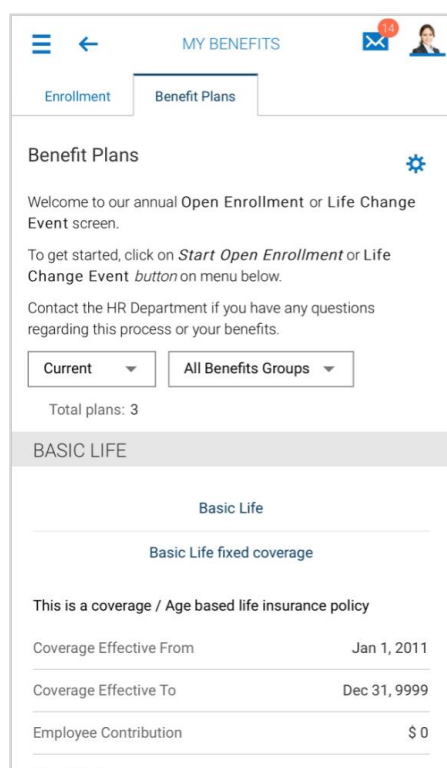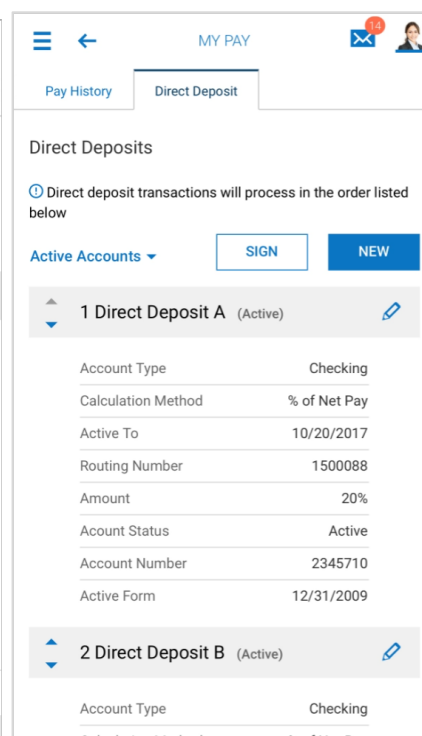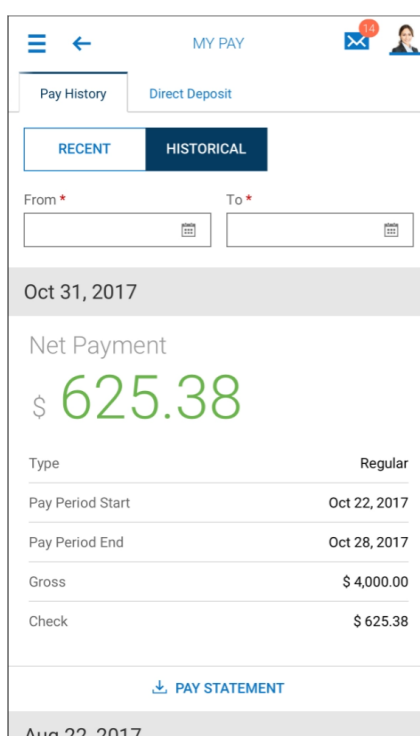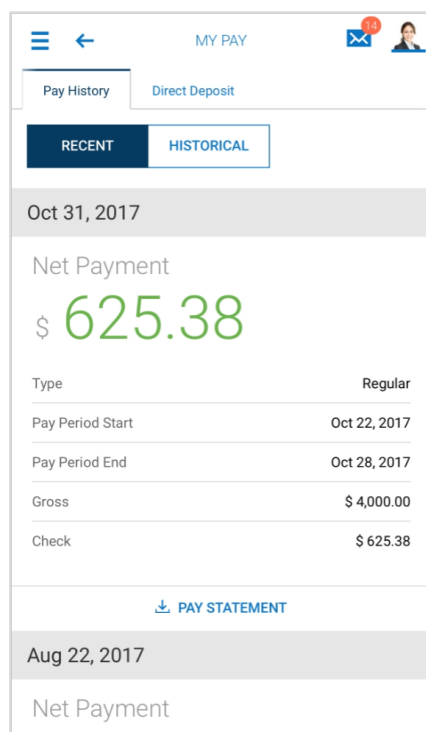
My Pay

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.
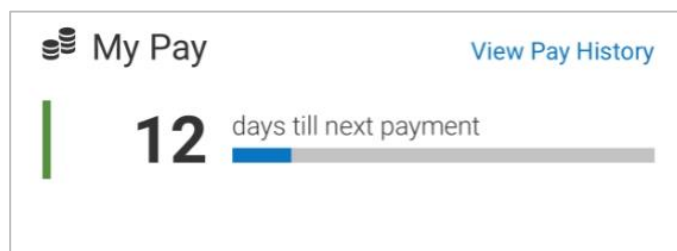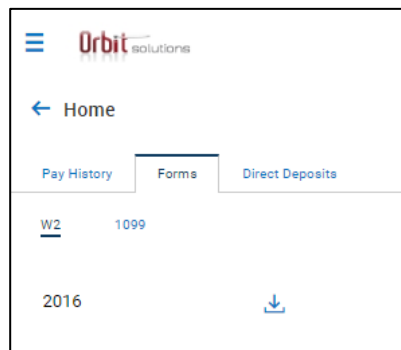
Pay History
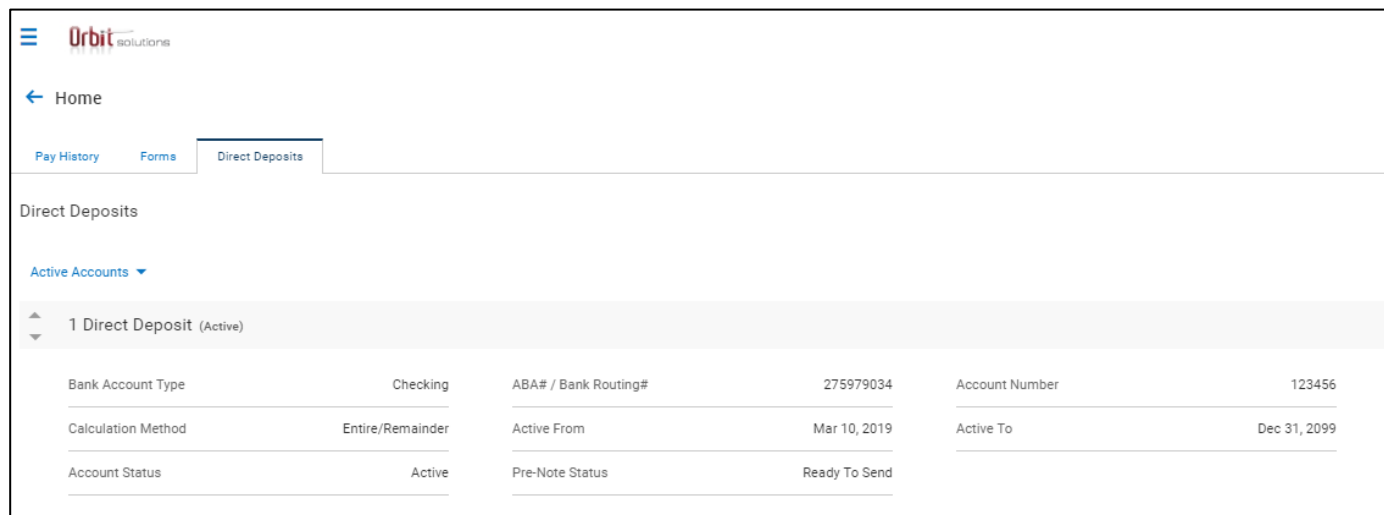
If authorized, you can tap the download *Pay Statement* link and the pay statement will display in PDF on a separate page. From there, you can download and save the PDF to your device. To return to your session without having to logout, tap the name of your app at the very top-left of your device.

Forms (W2 & 1099)

Direct Deposits

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.
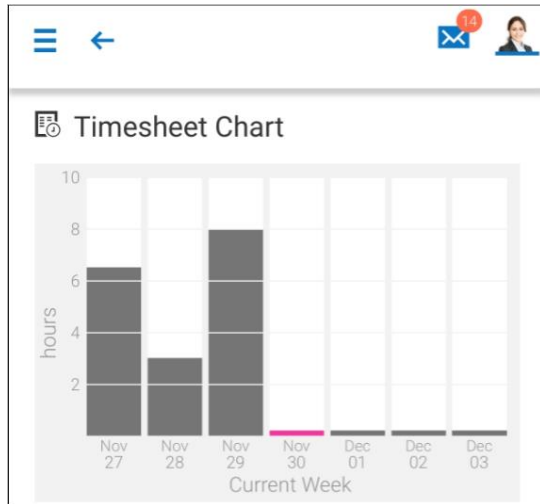
Time Statistics

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.
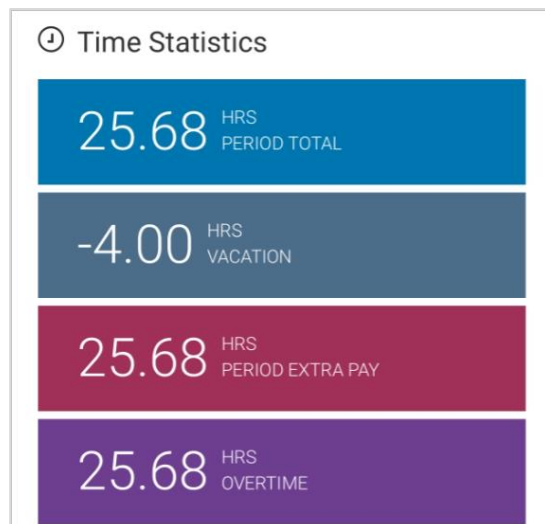
My Mailbox

The envelope 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.

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.
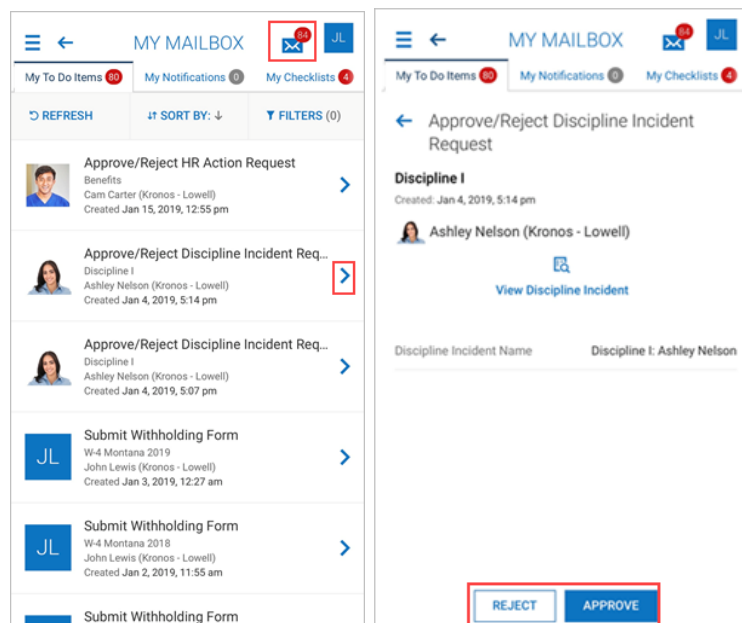
My Notifications

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*.
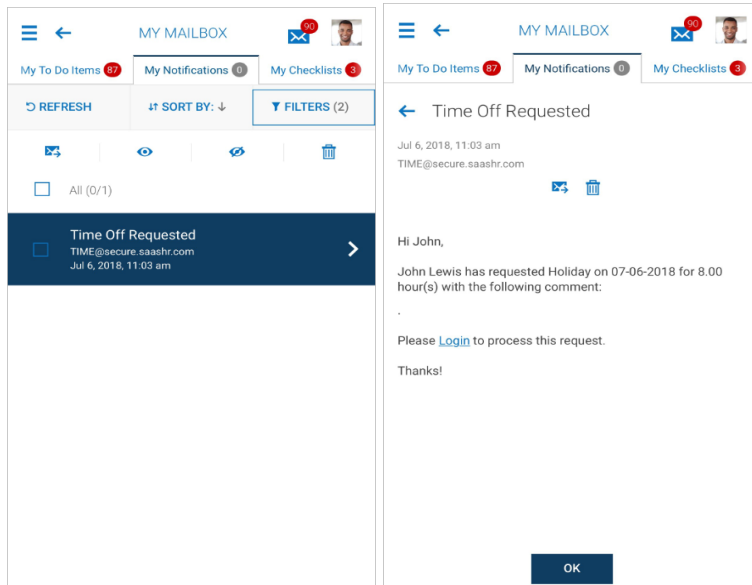
My Checklists

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.
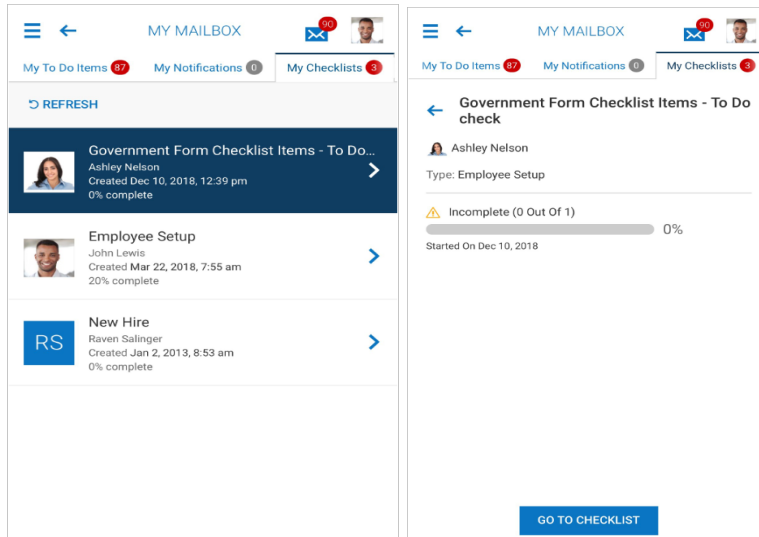
Global Navigation Menu

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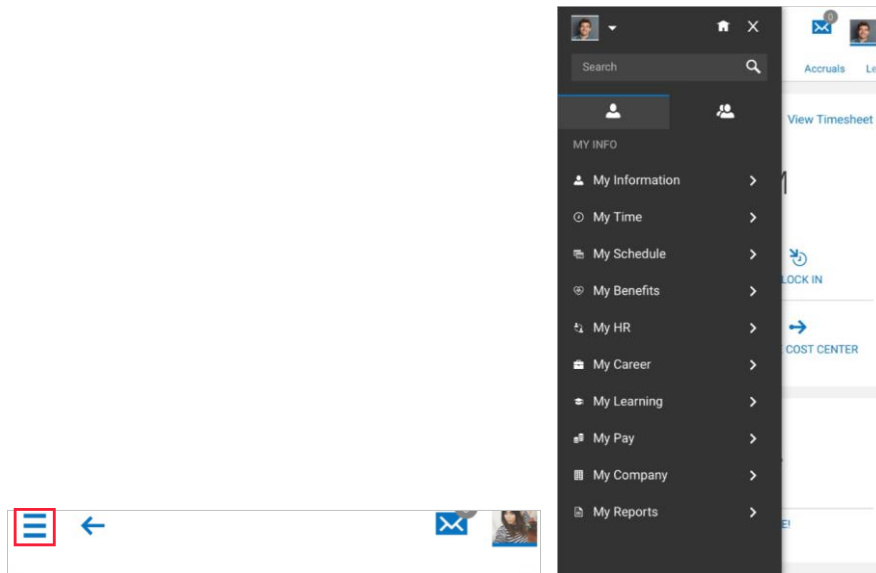
Tapping *Home* will return you to home page, or first page you see after logging in.

Tapping the *Gear* icon will open your Change Company & Region page. You may also see this page when accessing the app for the first time. 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.
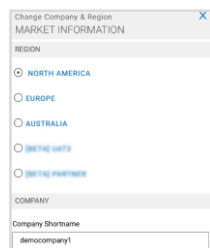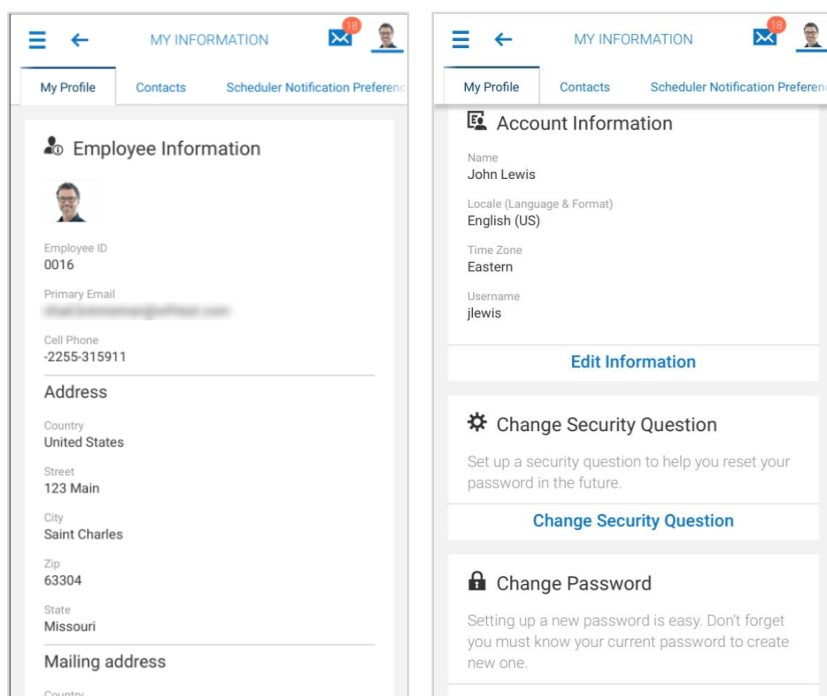
Tapping the *Sign Out* link will log you out of your current session and return you to the Log In page.
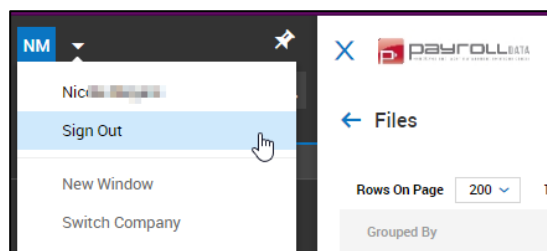
My Profile

Your company may have some of your personal account information available to you in your profile. To access this information, tap your picture or your name and your profile will open. 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.
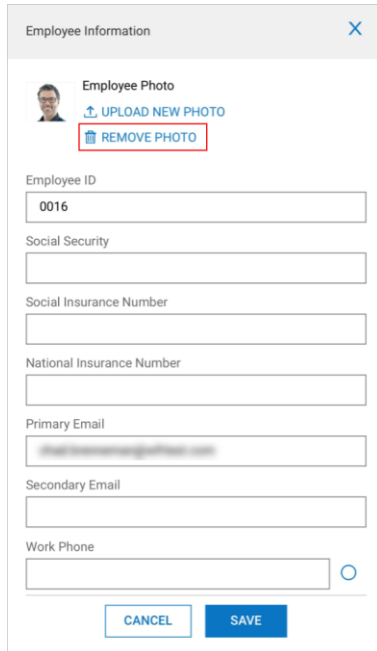
Uploading Your Profile Picture

To upload your own profile picture, you must be granted editing rights to your profile. If you have these rights, there will be an *Edit Information* link at the bottom of the *Employee Information* section, as shown below.

Tap **Upload New Photo** and several options will display, allowing you to select existing photos or take a new photo to upload.

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 envelope 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.
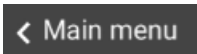
- Under the main menu, accessed after tapping the hamburger icon, your profile picture (if uploaded) will display along with your name. Tapping this will open your profile. If your picture has not been uploaded, this field will display your initials and will work the same way.
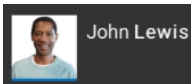
- Tapping the X in the upper right corner of the main menu will close the main menu and leave you on the currently selected page.

- 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.
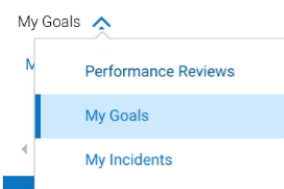
- Any page with a calendar indicates that the dates can be changed. Tap to open the calendar and select a different date.

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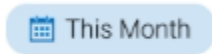
- Any page with the funnel icon indicates that filtering criteria is available. Tap to open the filter settings and make a selection to change the data shown. A number next to the icon indicates the number of active filter settings.

▼ (1)

- 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.

Timesheets ▼

- The Edit Information link will display when your company has authorized you to edit information for the selected page.

Edit Information

- 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.
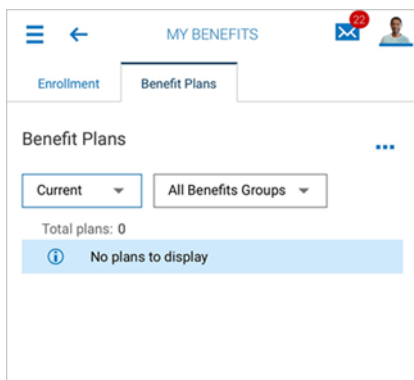
Search

There is a Search Bar within the system that allows you to search for items throughout the system. This field will allow you to search for configuration pieces that are clickable, as well as specific employees (by name, Id, or badge). You will only be able to search for items based on your Security.

My Info - User Experience

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.
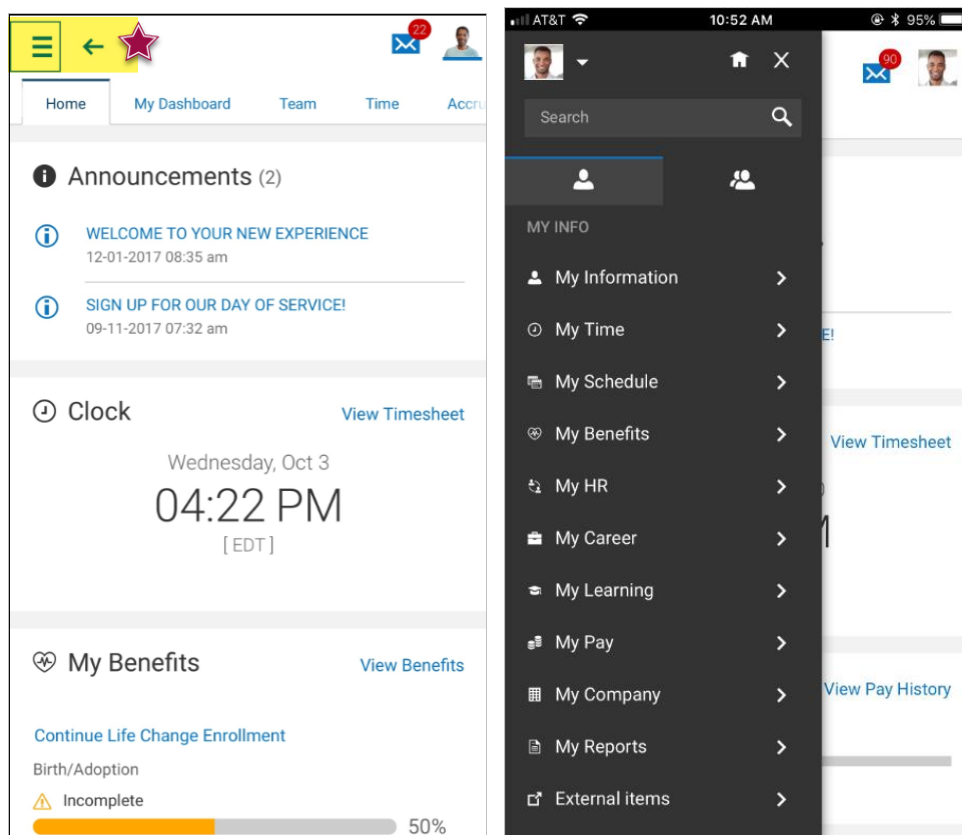
My Information

Under the My Information menu are options to access your profile, your contacts and set your notification preferences (if authorized.)
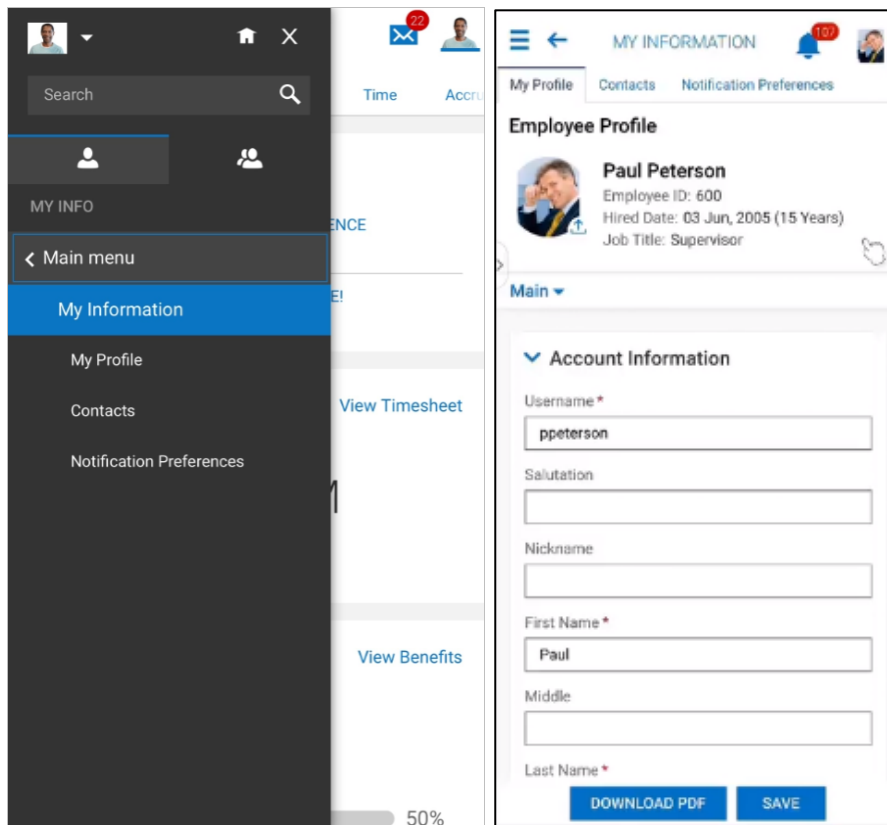
- **My Profile** – Under your profile, you can view your account information, and if authorized, edit certain types of information. Options under here can include your basic information within the Employee Information widget, Touch ID authentication, Account Demographics, Account Information (name, locale, 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.
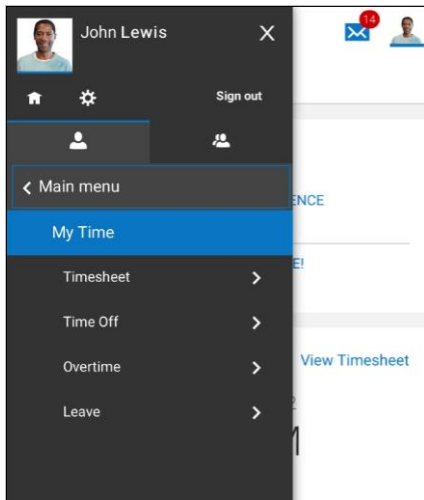
Timesheet Menu

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.
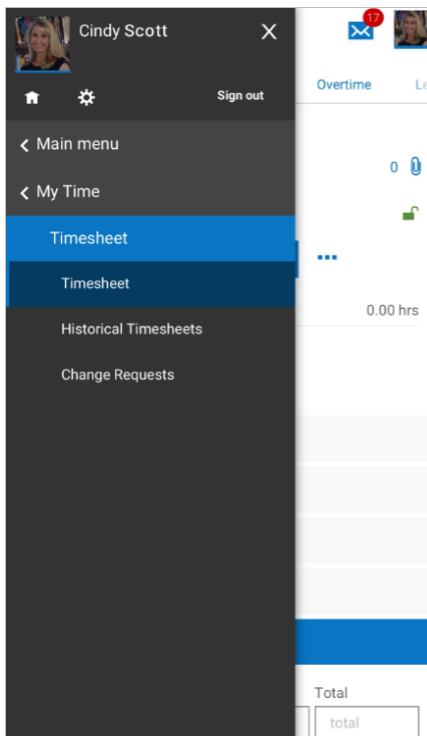
Timesheet

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.
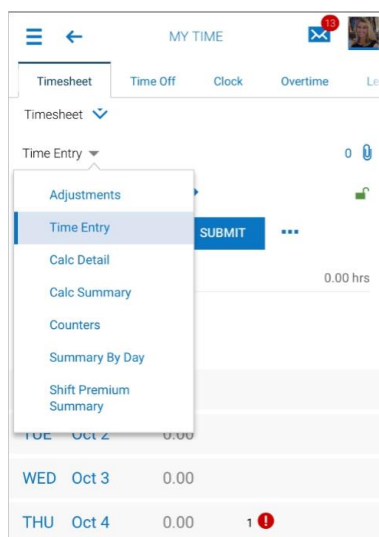
To edit any other day, tap to open that day and it will be added to the current day for editing. Tap the *Add Time Entry* link and another time entry field will be added to that date.

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.
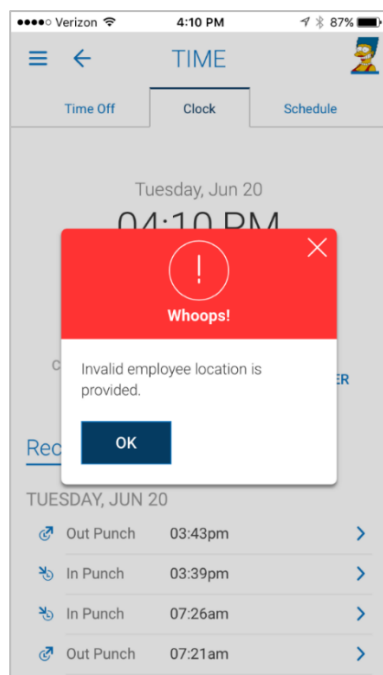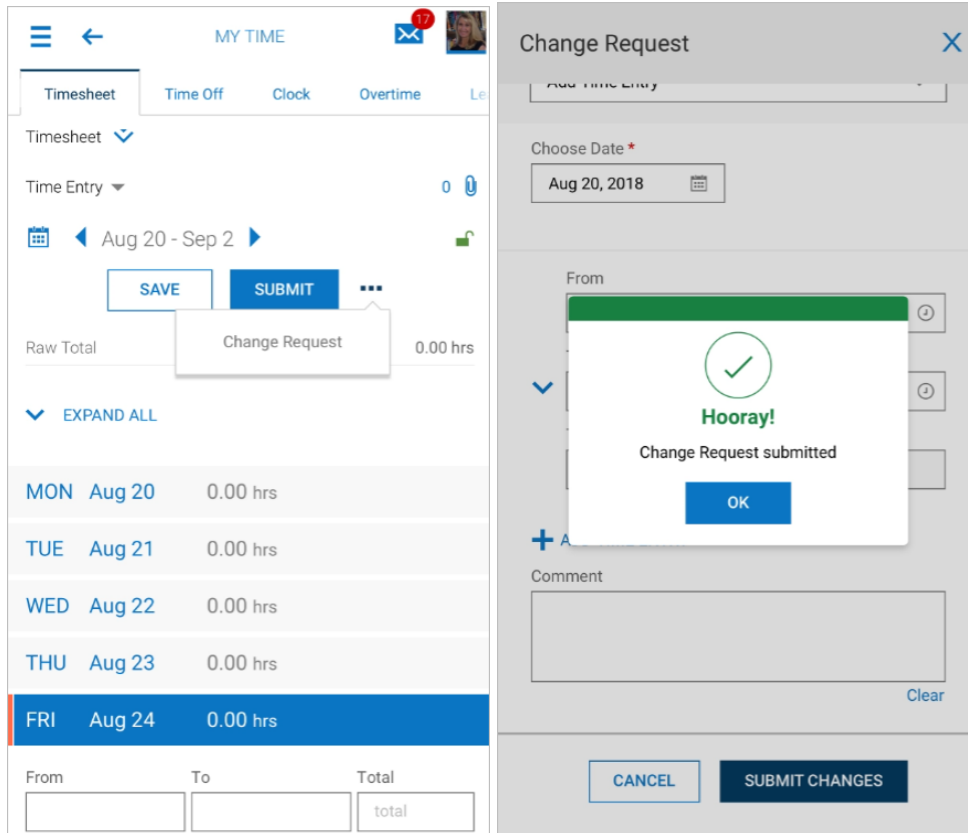
Historical Timesheets

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.)
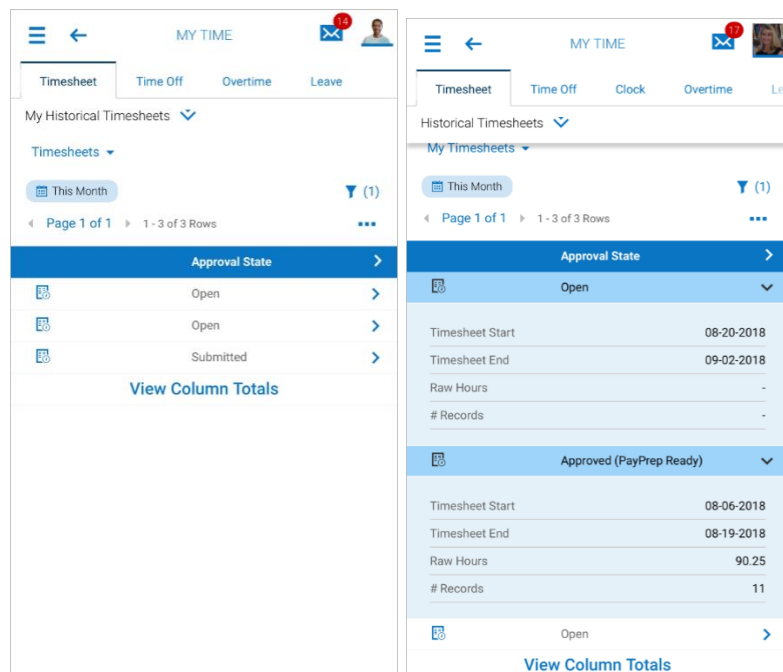
Change Requests

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.
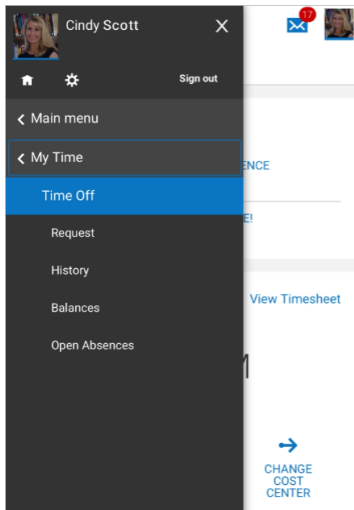
Request

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, delete or cancel 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*.

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 format from the *Open Absences* menu.
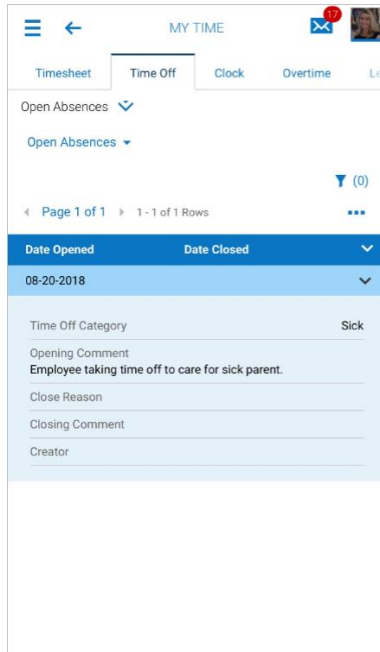
Leave
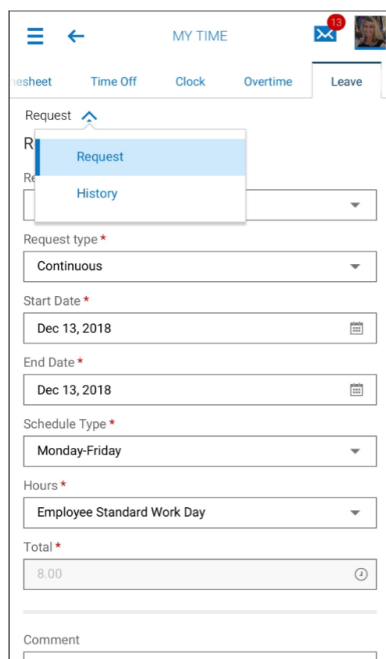
Absence requests will only display if your company is using the Leave module and has it activated to display on your device. If you are already familiar with creating leave requests from the web application, the process in the Mobile App is much the same. This can be accessed from *Main menu > My Time > 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.
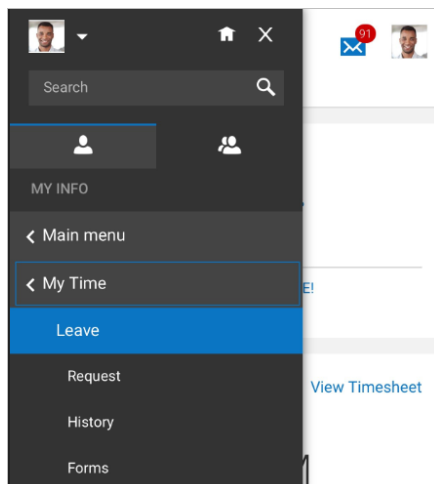
Request

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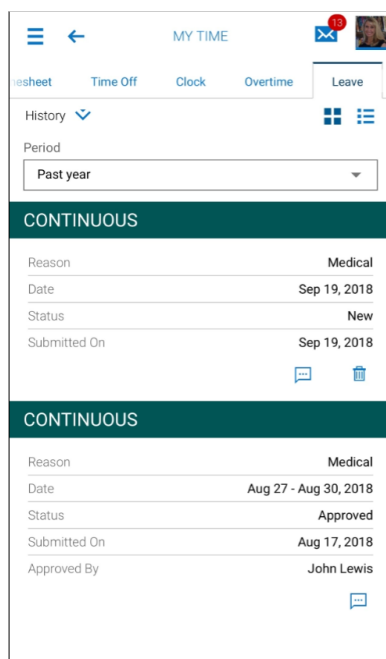
History

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.
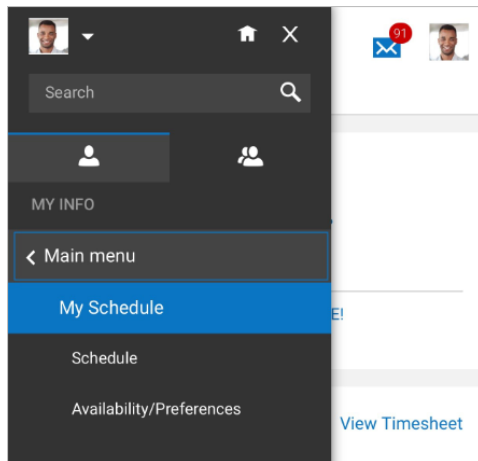
Schedule

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.
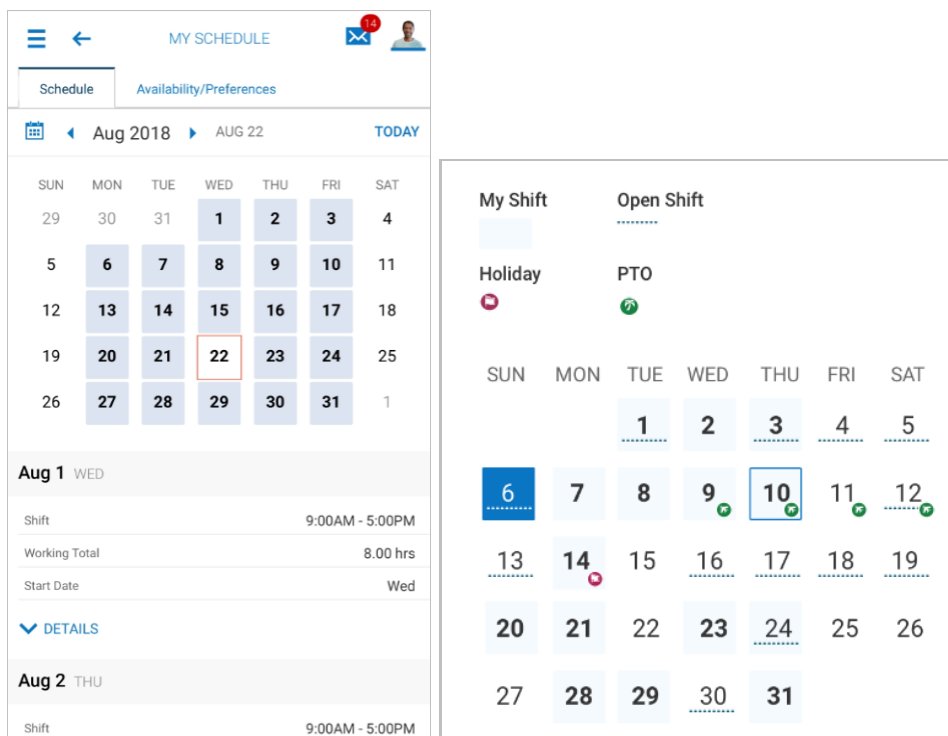
Visual indicators/icons display on the calendar available to employees so that the employees know when there is:
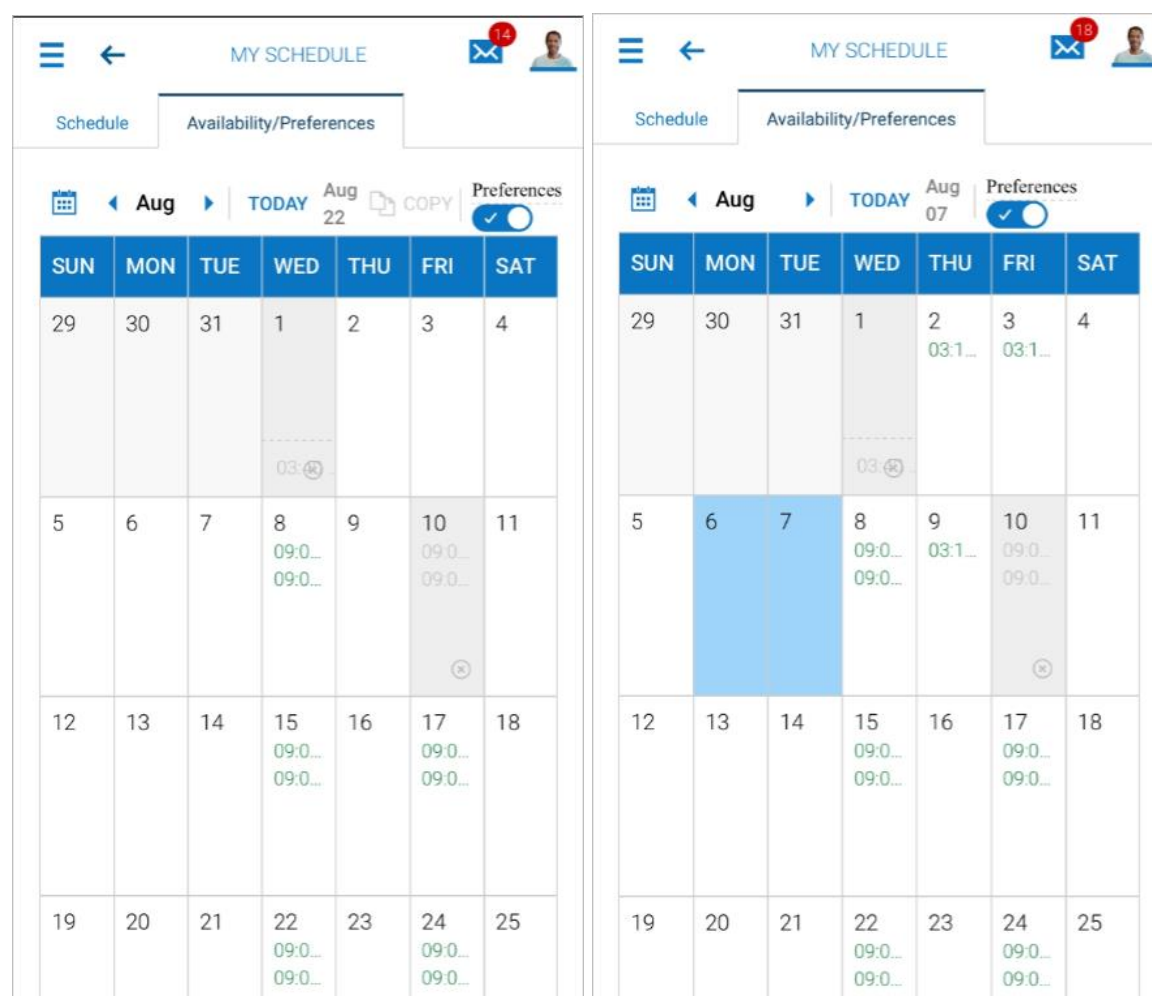
- Time Off
- Holidays
- Scheduled shift(s)

- Posted shift(s)
- Open shift(s)

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.
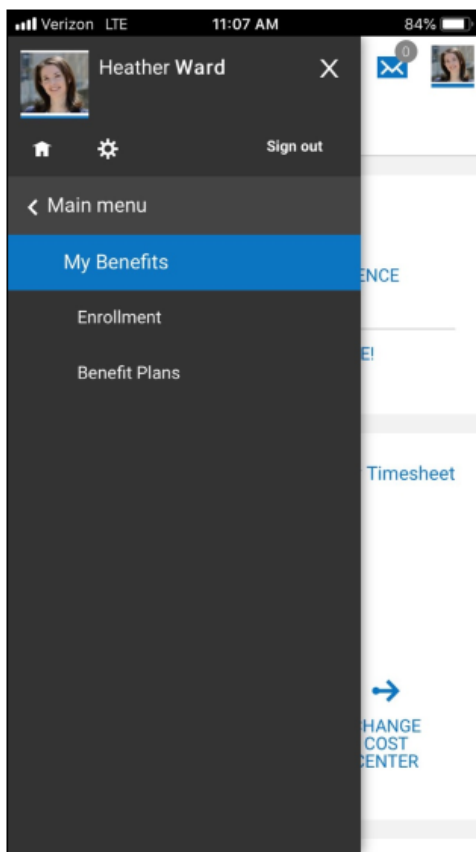
My Benefits

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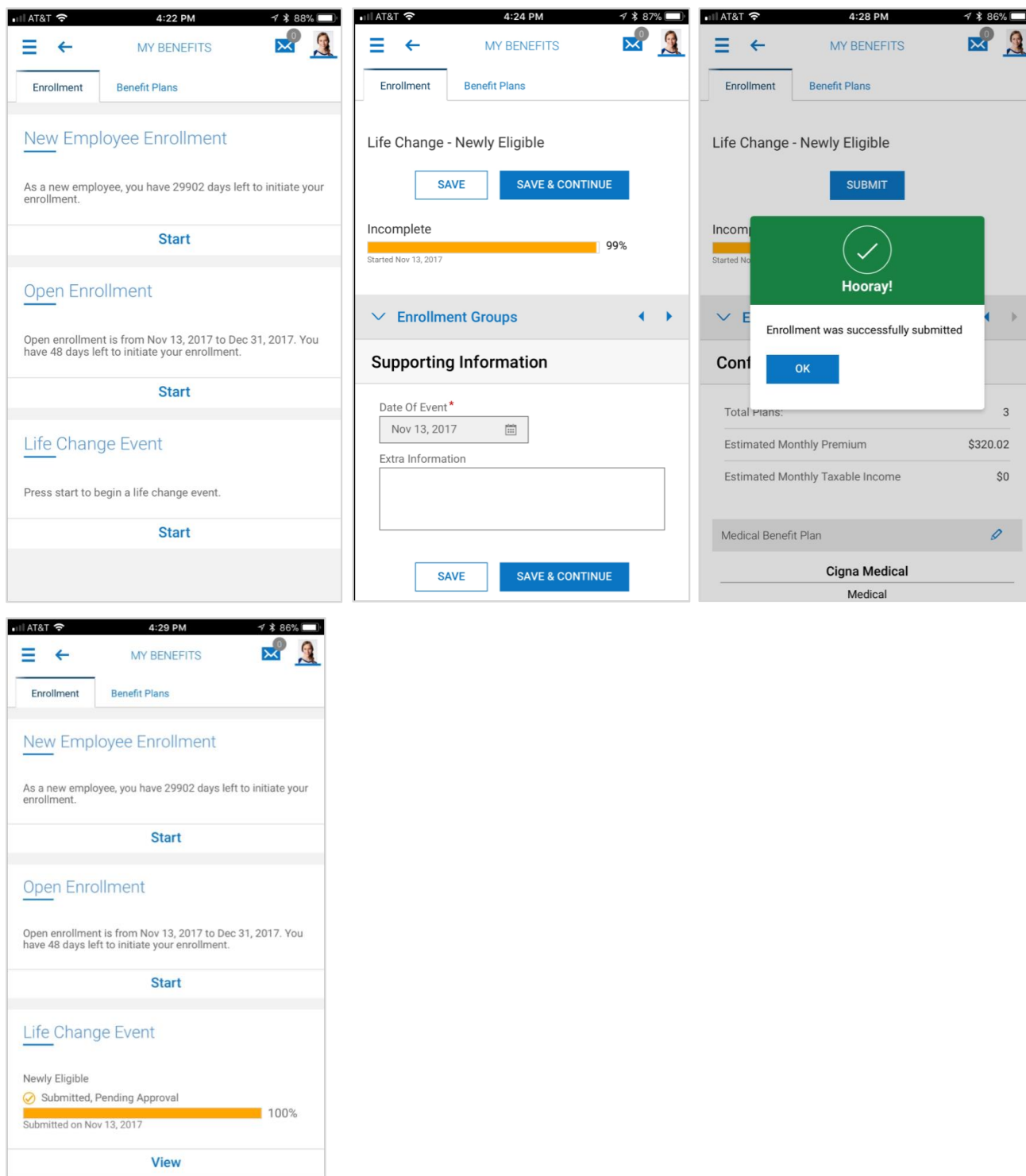
Tap *Main menu* to return to the other options. Tapping the *Home* icon will return you to your home page, where you will need to access the hamburger icon again to get to the main menu options.

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.
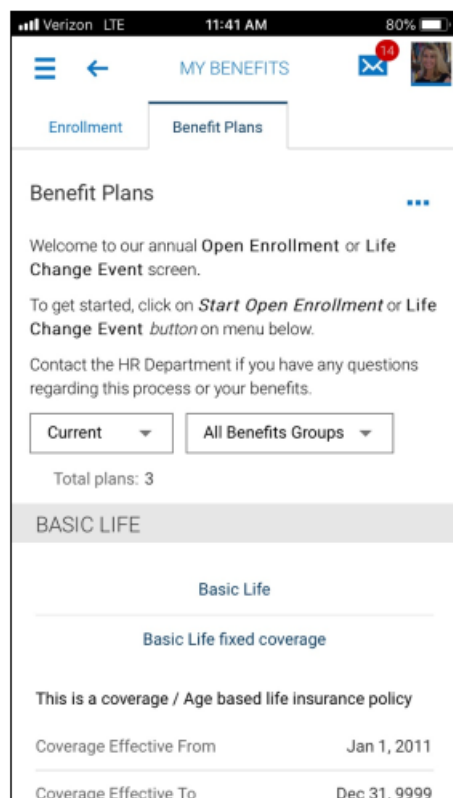
Enrollment

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.
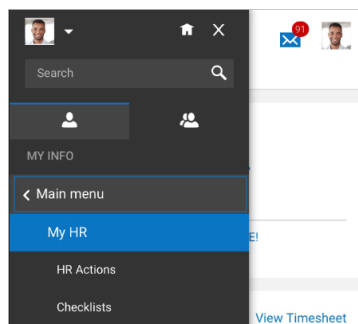
HR Actions

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.
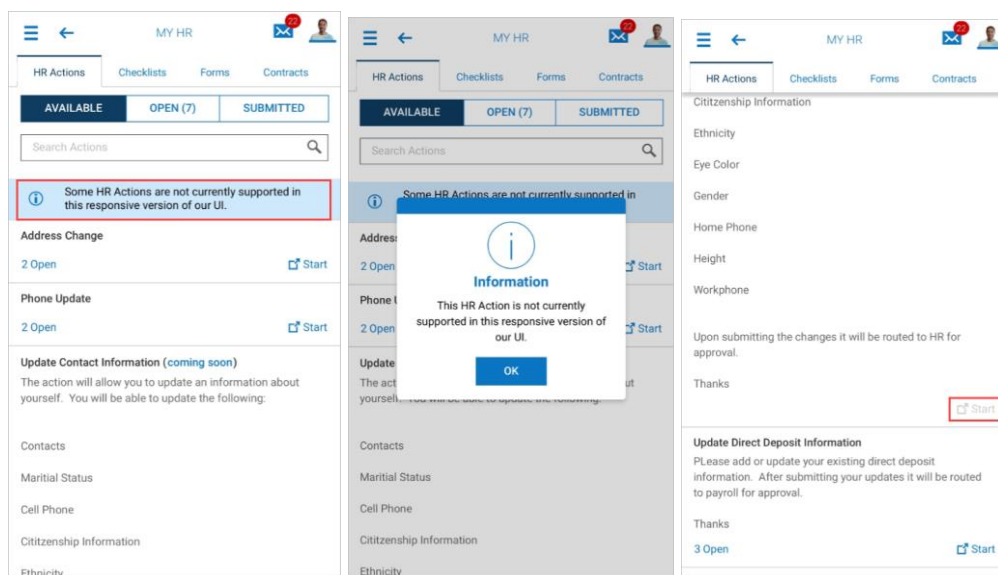
Available Tab

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.
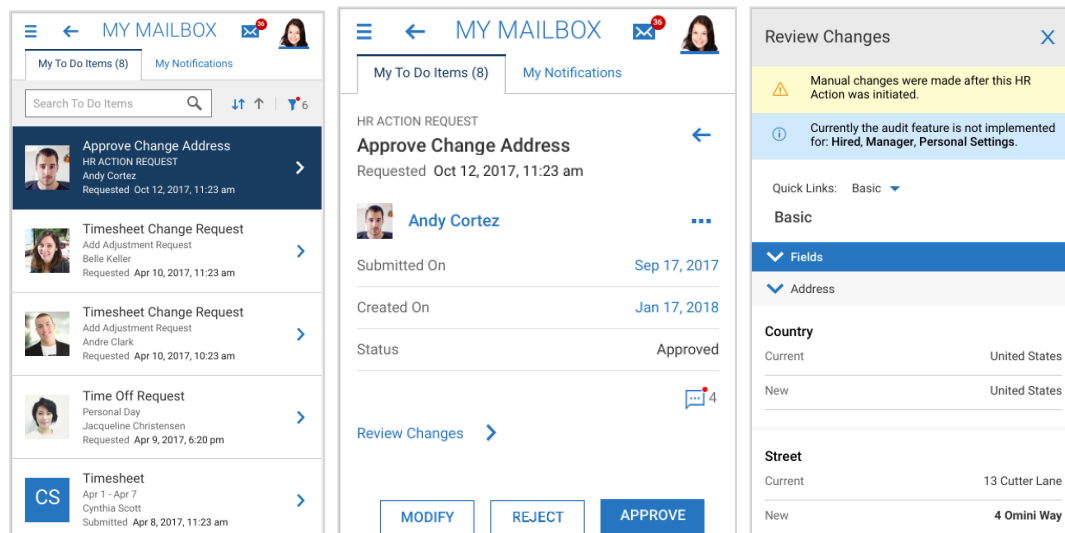
Checklists

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.
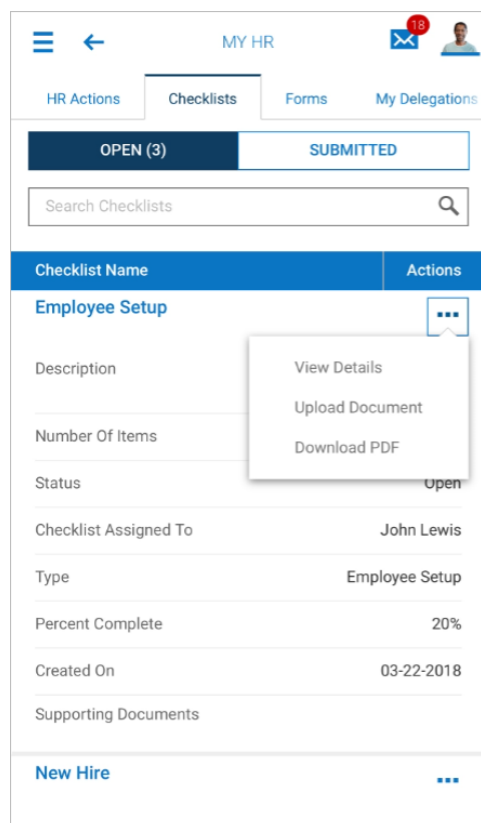
View Details

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.
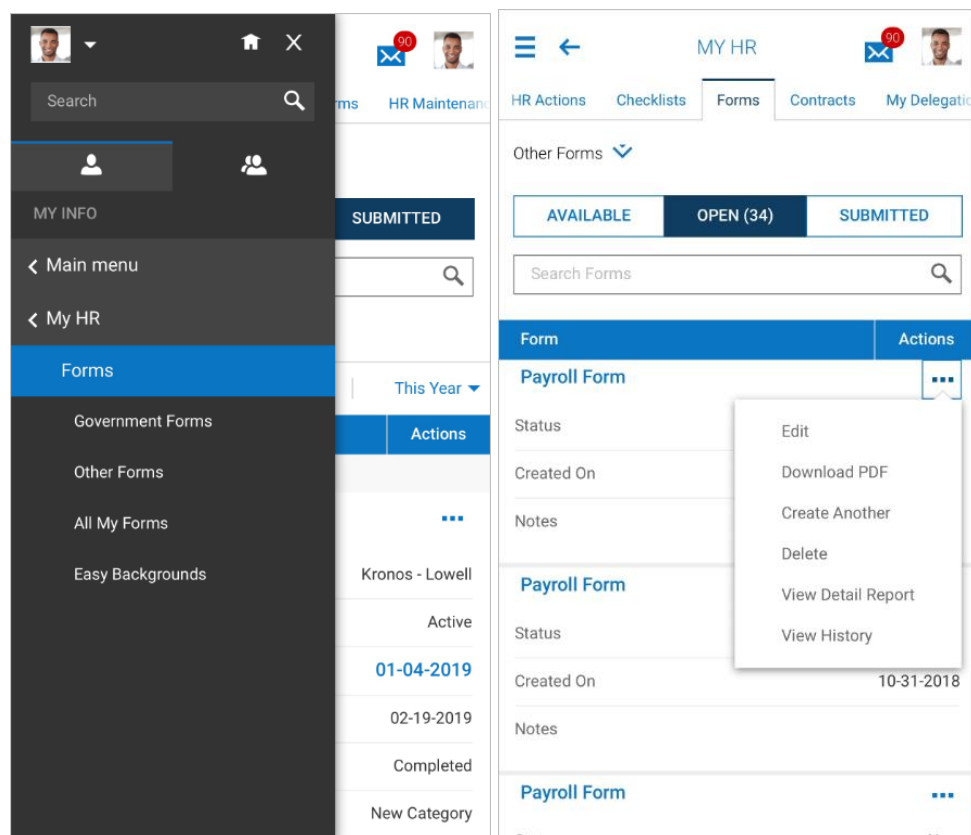
Government Forms

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.
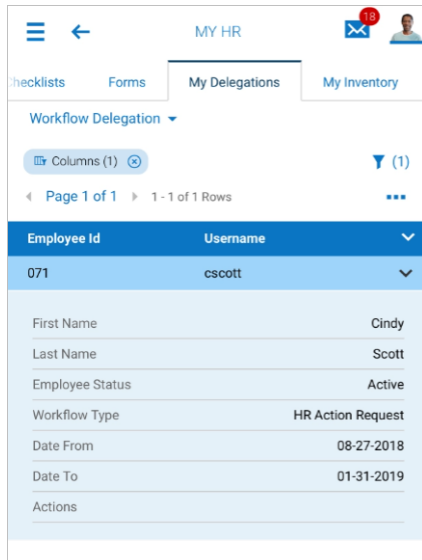
All My Forms

This area will house all your forms.

Easy Backgrounds

If your company uses the New Easy Backgrounds Marketplace product, employees can be set up so they can view any background checks ordered on them. This area will display those reports.

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.
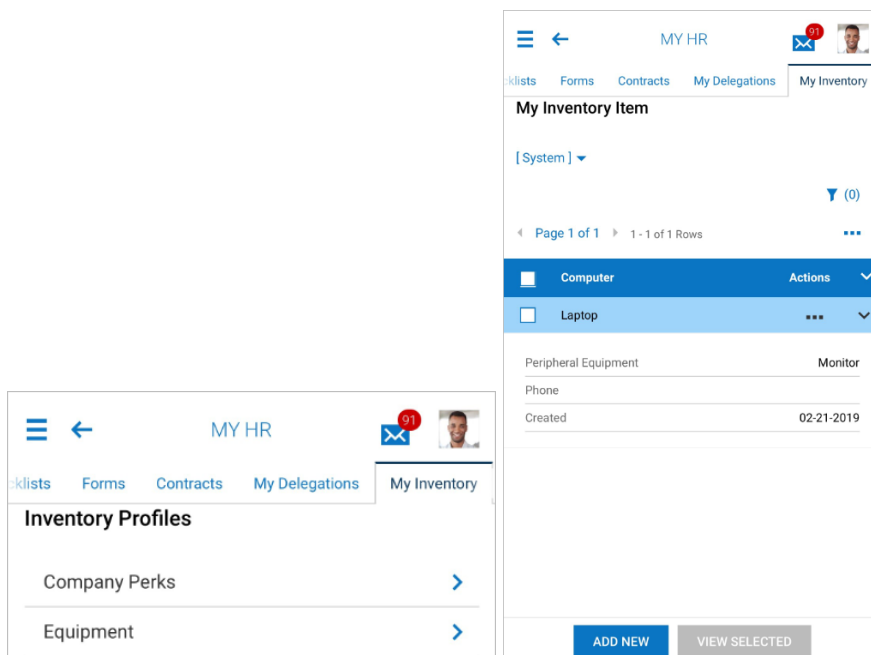
My Inventory

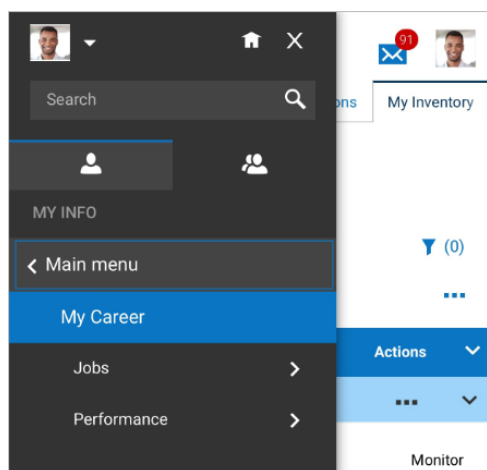If an inventory items has been assigned to you, you can view and possibly add and delete those items here.

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
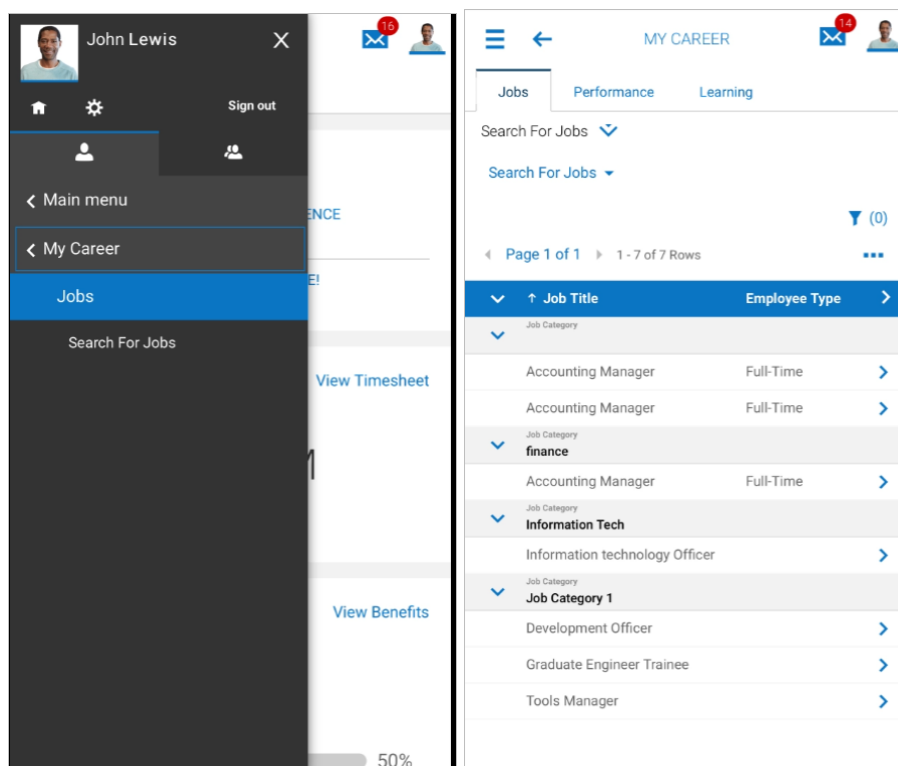
Training/Certifications

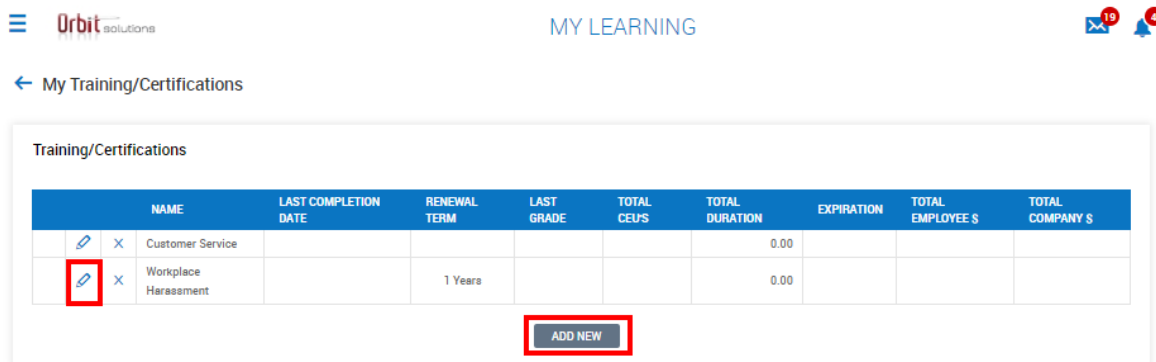In this area you can review, edit and add trainings and certification your company is tracking.

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.
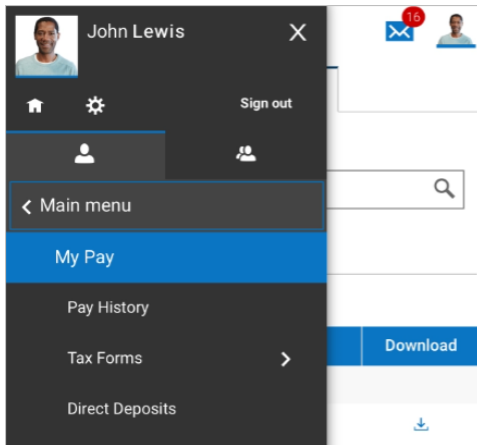
Pay History

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.
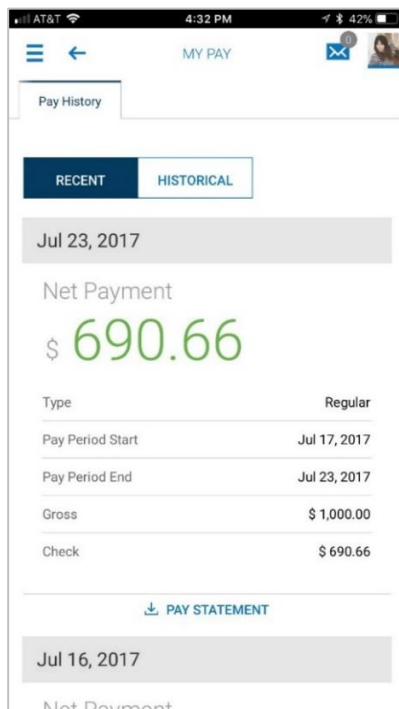
You can tap the *Pay Statement* link and download the full pay statement for that entry. On the *Historical* tab, you can enter a date range to view the pay statements for that range. Historical pay statements can also be downloaded via the *Pay Statement* link.
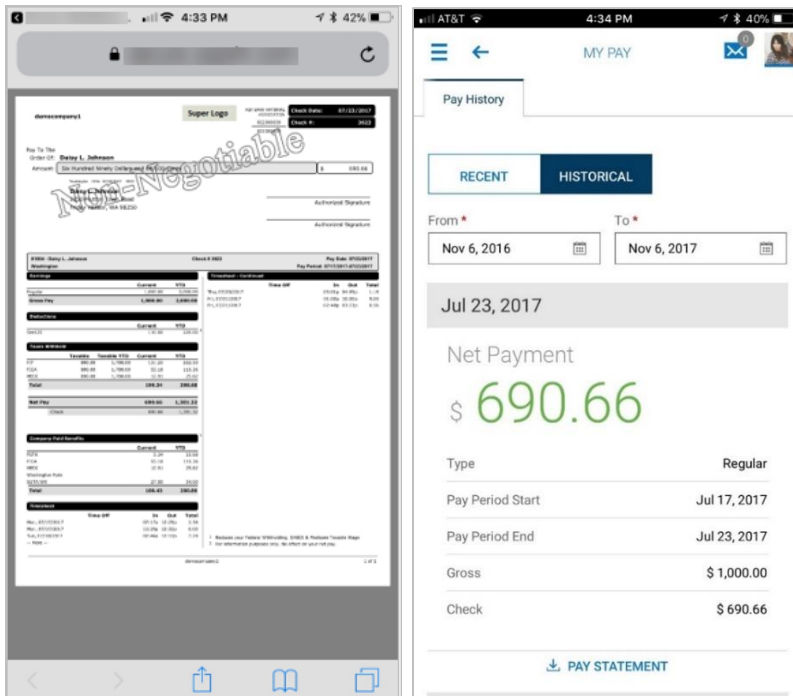
Tax Forms

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.
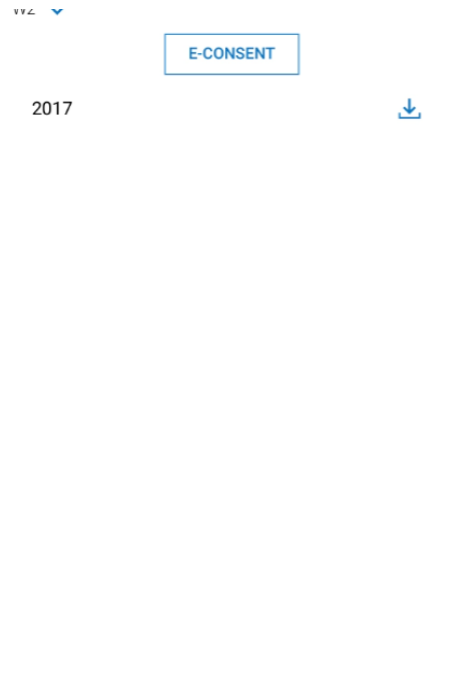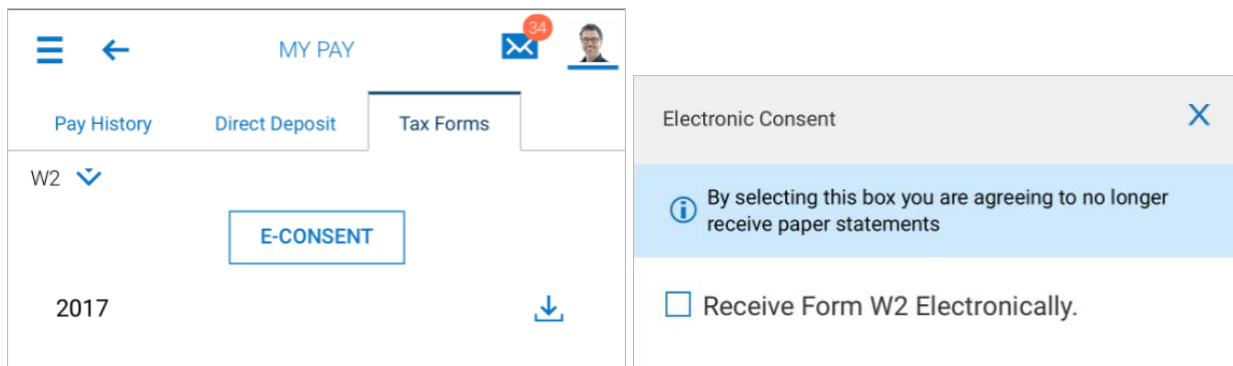

A list of available forms is shown under the W2 label with a download icon in each row. After providing consent to receive the W2 form electronically, a PDF file can be downloaded by clicking the download icon. The PDF will appear in a pop-up and can then be printed or saved.

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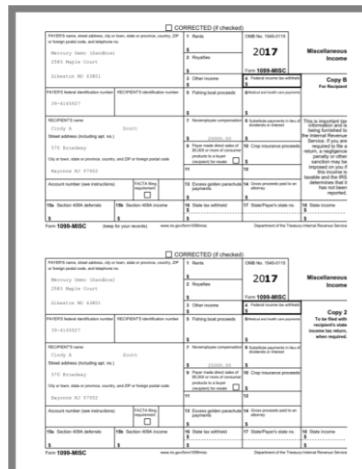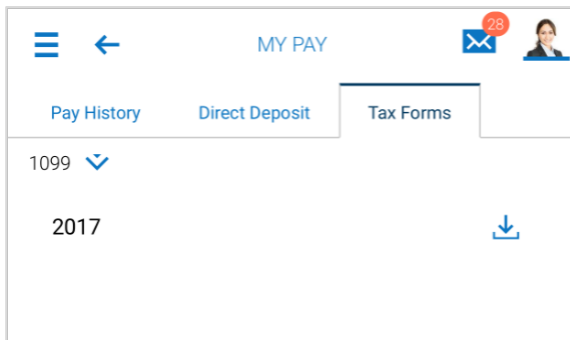
The form can be accessed from *My Pay > Tax Forms*. All available years appear in a list, with the year shown on the left and a download icon in the row on the right. A PDF file can be downloaded and viewed by tapping the download icon. Copy B, 2 and C will be downloaded in a single two-page file.
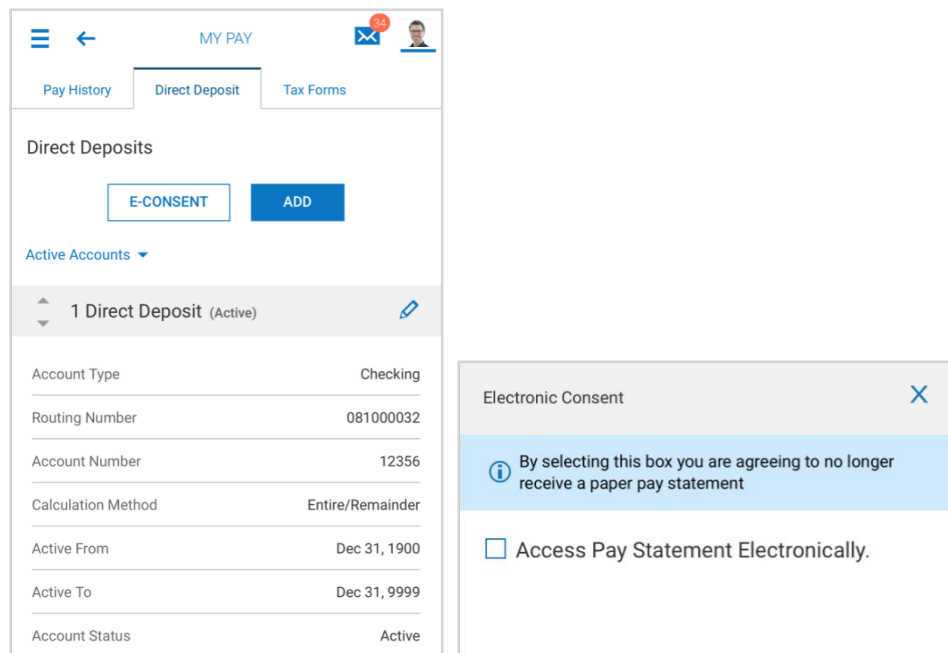
Direct Deposits

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.
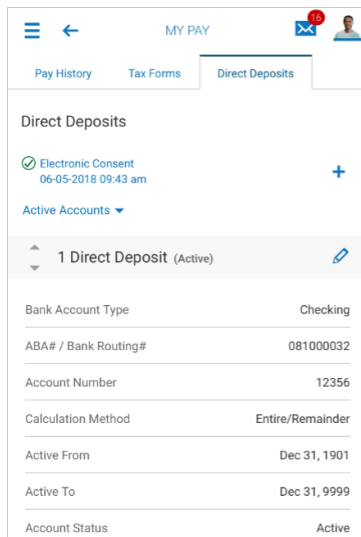
The *E-Consent* button will allow employees to receive their pay statement electronically. Users who choose this option will not receive paper copies of the forms unless they turn electronic consent off.

NOTE to Administrators: Electronic Consent can be enabled at the company level. Contact your CSR if you wish to have this enabled.

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

My Company

Under the My Company menu are options to view documents uploaded by your company.
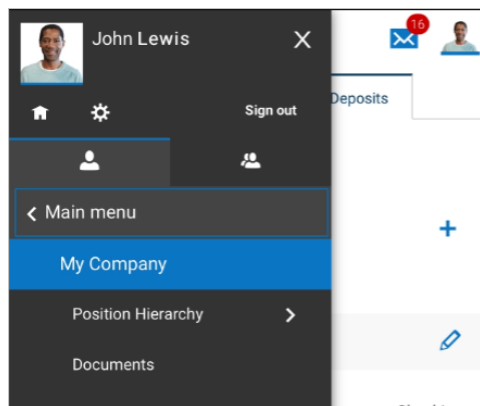
Documents

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.
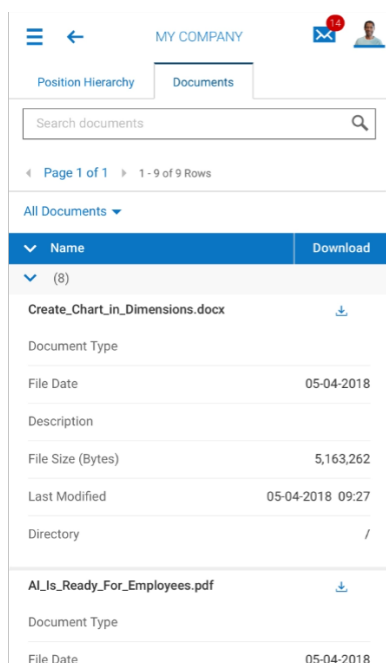
My Reports

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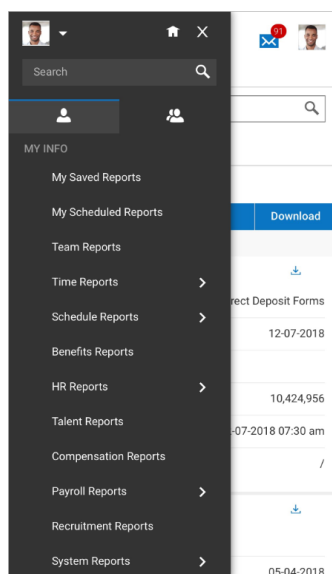
In most cases the users who will have access to reports will be managers and administrators. Employees seldom have access to reports but can be allowed to view them if security permissions allow.

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.

Sorting Report Data

When viewing the report, the data can be sorted by tapping on the *Actions* icon above the blue key bar displayed in the report and tapping *Sort* in the action popover list. Select the column and sort order to define how the data will be sorted and tap on the *Apply* button. To clear sorting, tap the *Clear Sorting* link.

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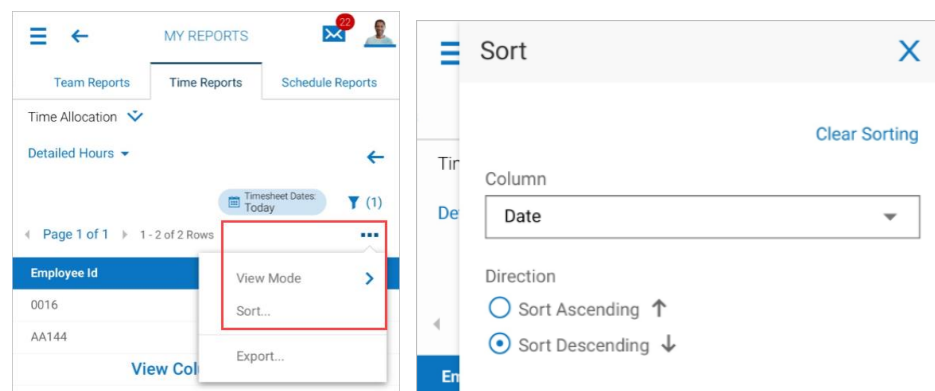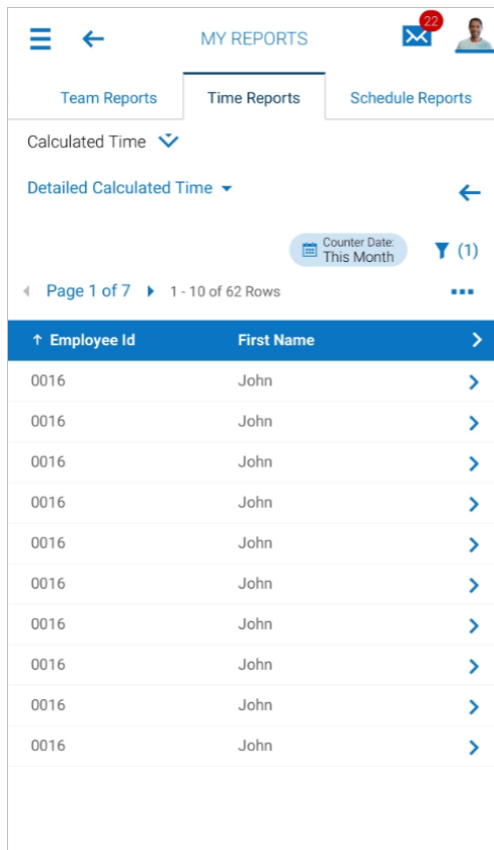
View Mode

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.
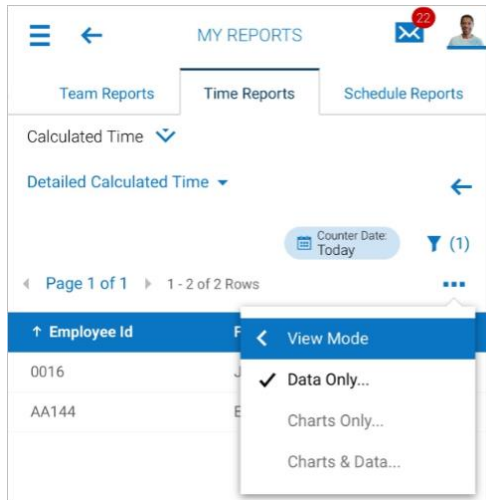
The *Data Only* is default option and will display reports in a traditional report view.

The *Charts Only* is an option to view the report in a graphical view.
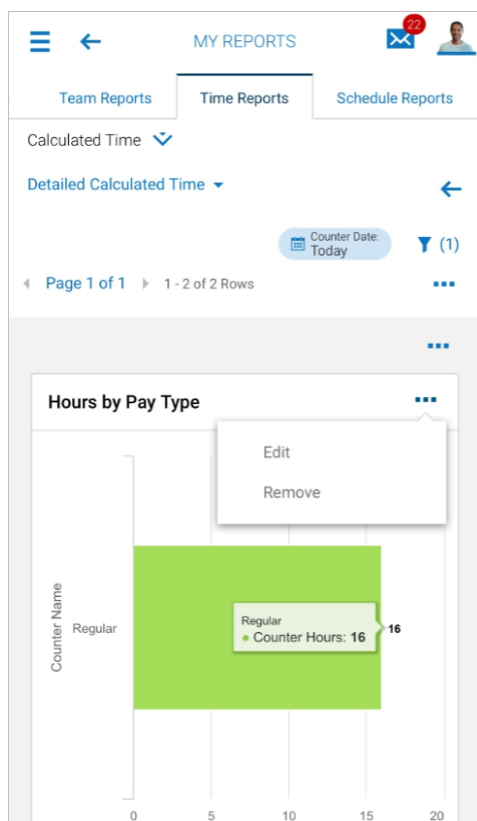
The *Charts & Data* option will display both the traditional reports at the top of the screen with the charts underneath.
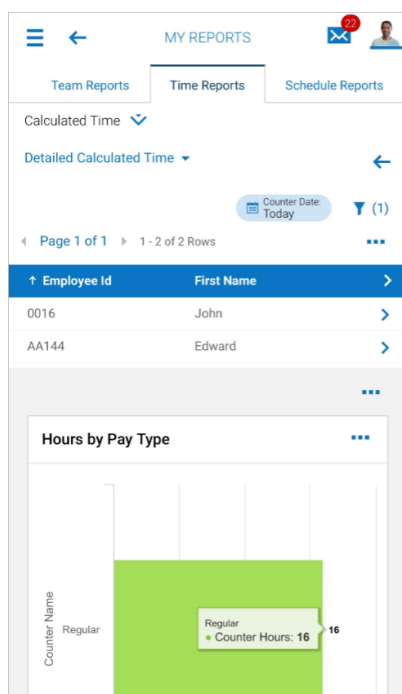
Filters Icon

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*.
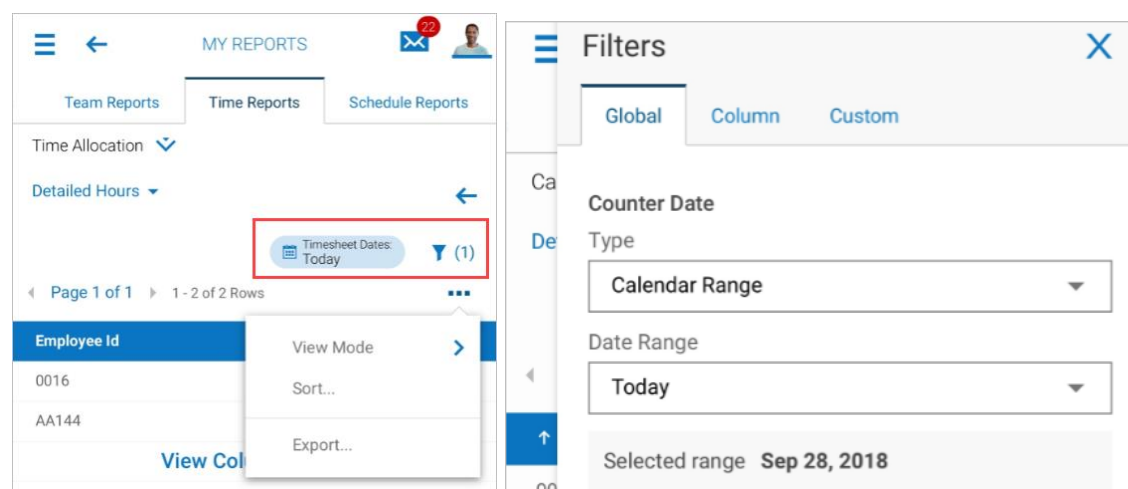
Filters – Global Tab - Employee Selections

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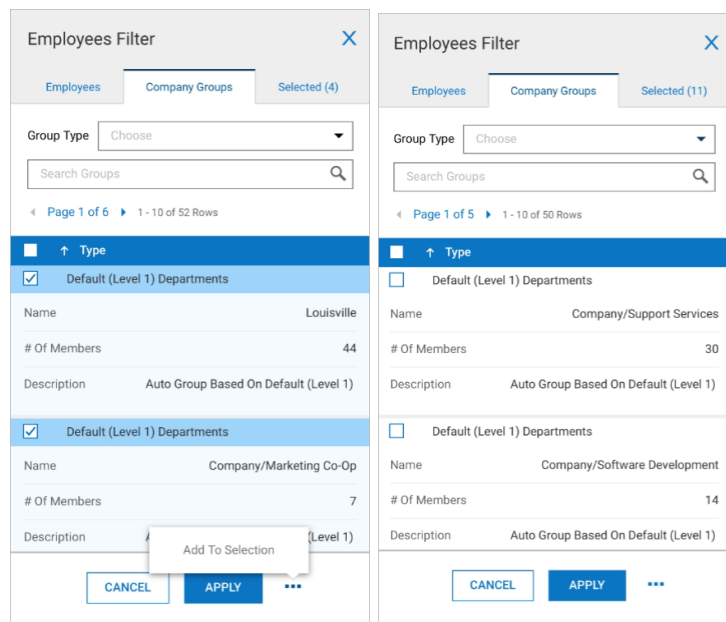
Select the employees to be included, then tap the *Actions* icon and select *Add To Selection*. The filter will display the number of employees selected. Tap *Apply*. On the subsequent page, tap *Apply* again and those employees will be selected for the report and a "pill" will display showing how many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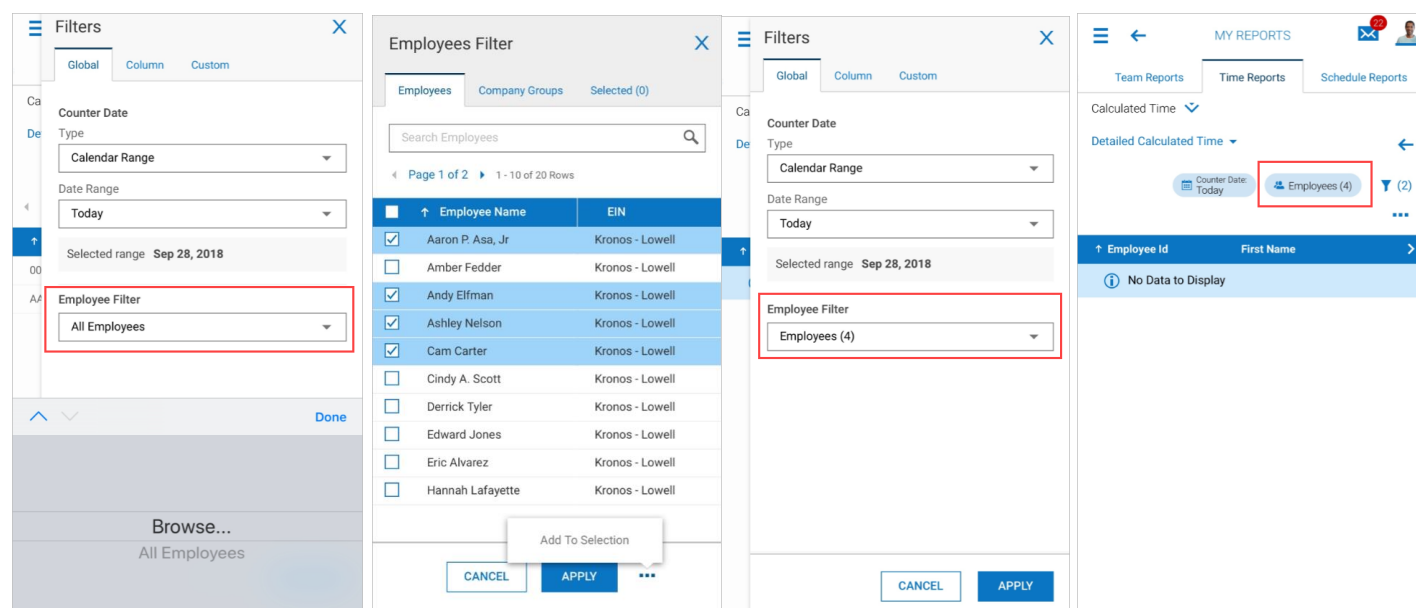
Filters – Global Tab – Company Groups
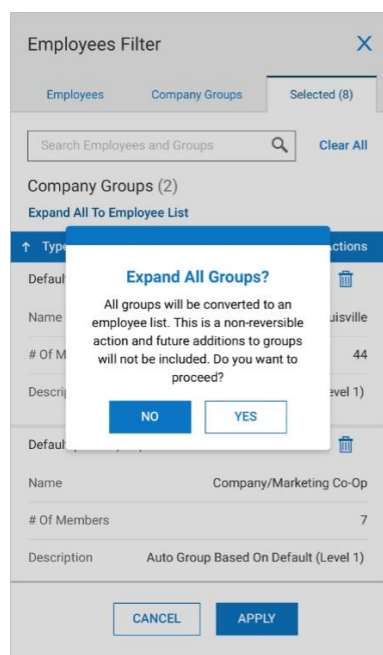
After selecting *Browse* from the *Employee Filter*, you can select employees by the group to which they are assigned. These are selected under the *Company Groups* tab. If your group list is large, you can use the *Group Type* and *Search* window to narrow the list.

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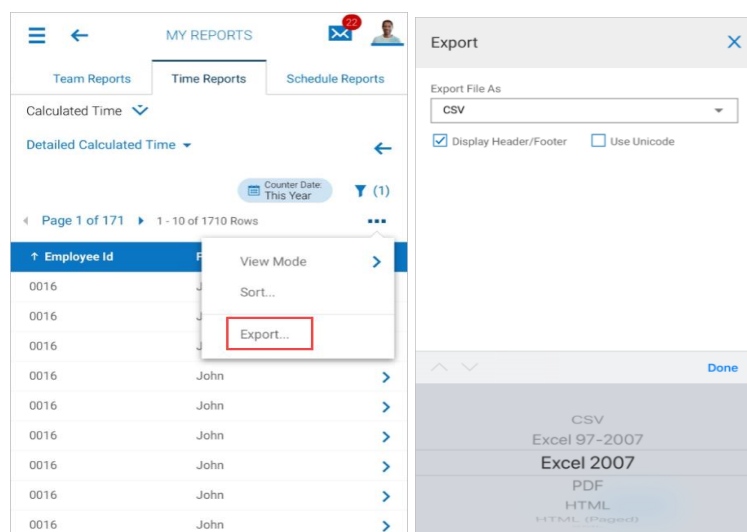
The column filtering can be changed by tapping on the *Columns* filter or tapping the filters icon again. Filters can be cleared by tapping the *Clear Filters* link.

Exporting Report Data

To export a report, tap the ellipses above the blue bar on the report tab, then tap *Export* in the action popover. Choose an export format and check the options, if needed, for output of headers and footers and Unicode. Tap *Done*, then tap *Export*. A new window will open with the export. You can return to the application by tapping the product name at the top of the phone screen.

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.
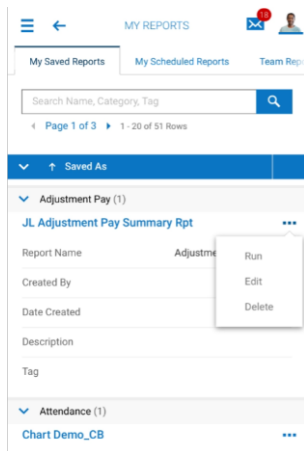
Edit – Saving/Sharing a Saved Report

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 will all employees.

- Once the settings are done, the report can be saved, or an option is available to save and run the report simultaneously.

Help

In this menu, your company may upload documents to help you learn certain tasks, or possibly create new content and links for training. These will be accessible under the *Download Documentation* option. Under this option, you can view and download documentation in PDF by tapping the download link next to each document. A separate browser will open to display the resulting PDF.
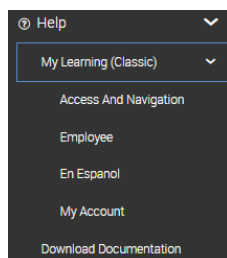
My Learning

In this area you will find topic specific tutorials, webinars and job aids related to Orbit Solutions. Based on your access, you will find items ranging from Navigation, Employee, Managers and Admin access tools. Clicking on the icon to the left of the topic will open new window or download item for you to review.
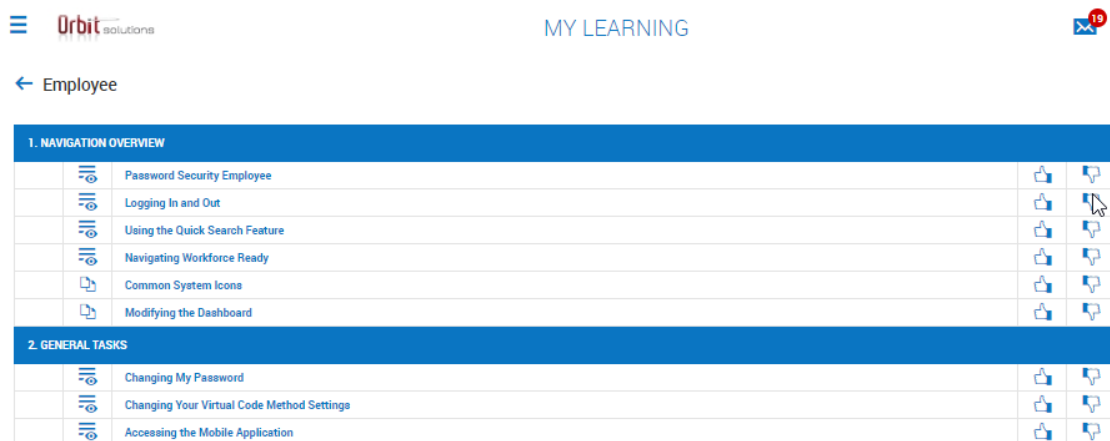
Download Documentation

In this area you will find general User guides, Release Notes etc. related to Orbit Solutions. Based on your access, you will find items ranging from Navigation, Employee, Managers and Admin tools. Clicking on the icon to the right of the Item will download the item for you to review. You may also use the Search field in to search for desired items.
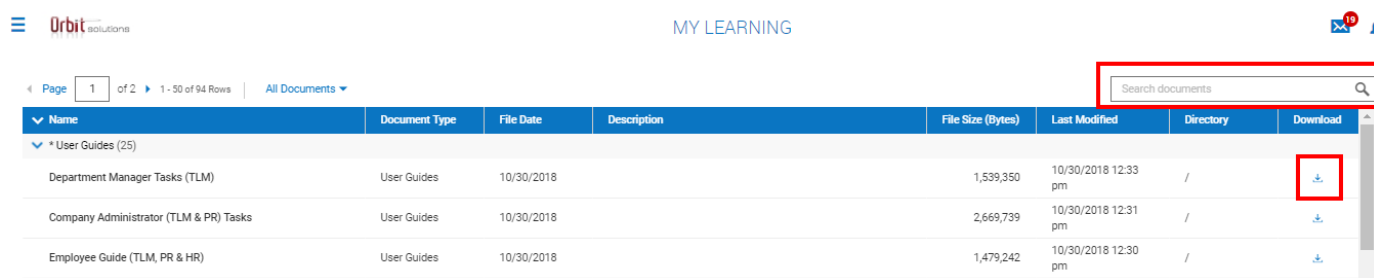
External Items/Links

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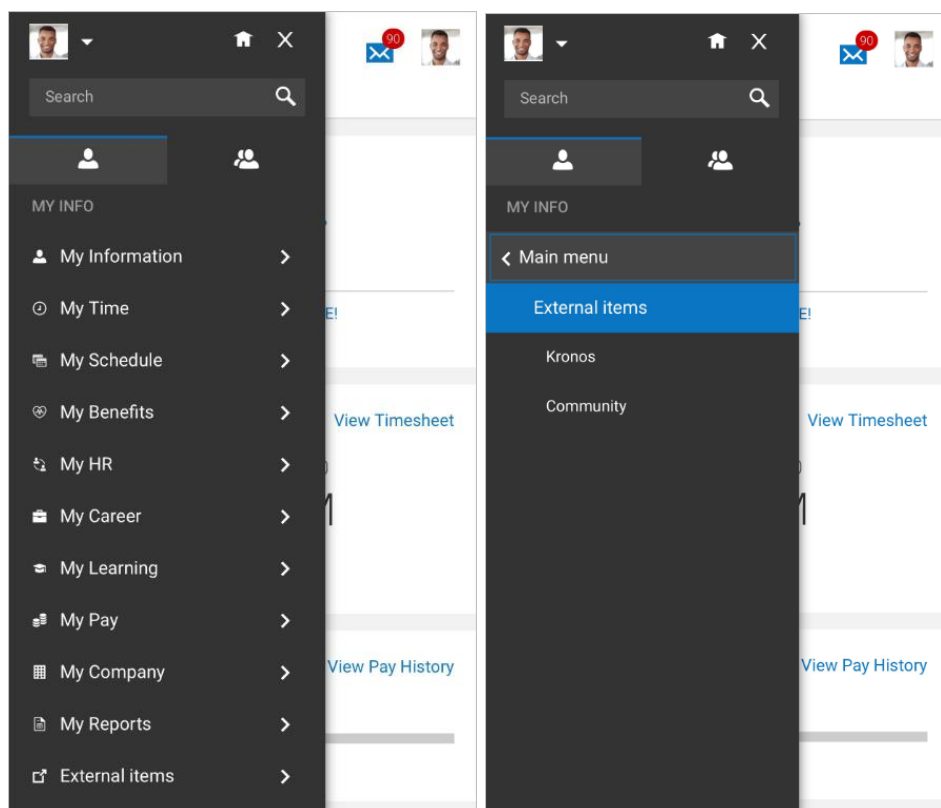
System administrators will define these links within the *Extra Menu Items* widget of security profiles.

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*.

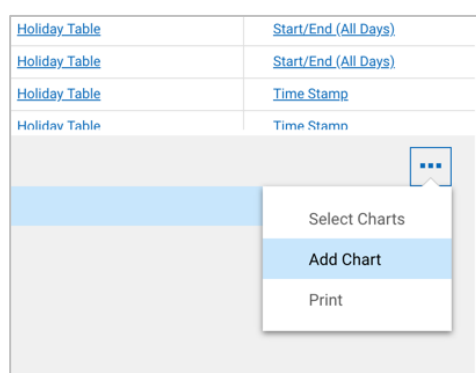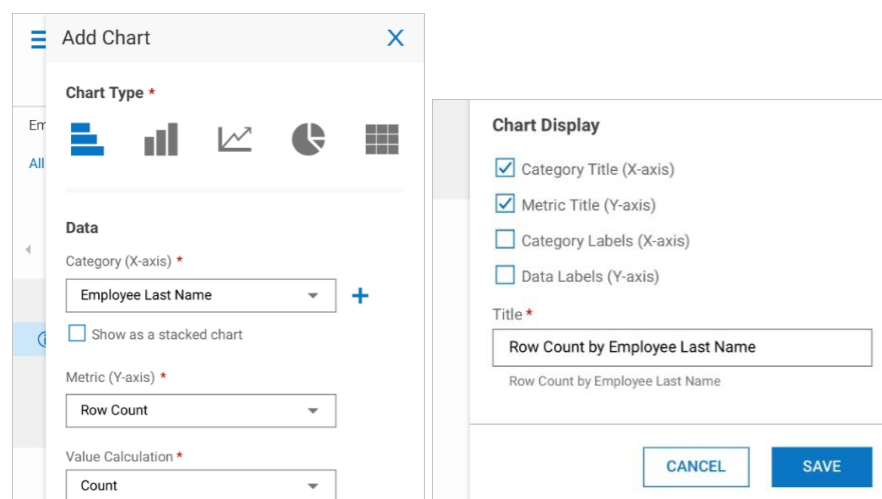*Show Data Only and Data*   *Show Charts Only*   *Show Charts*

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 within the home screen, 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.
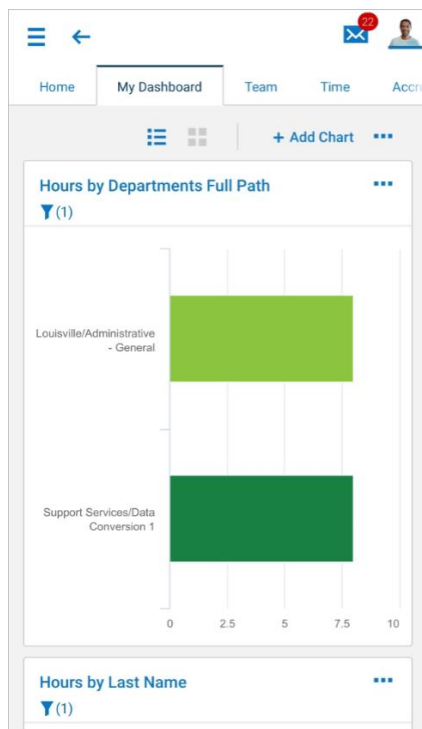
Things You Need to Know

- 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.

- 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.