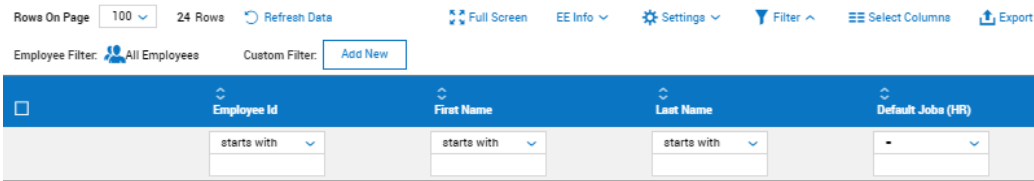


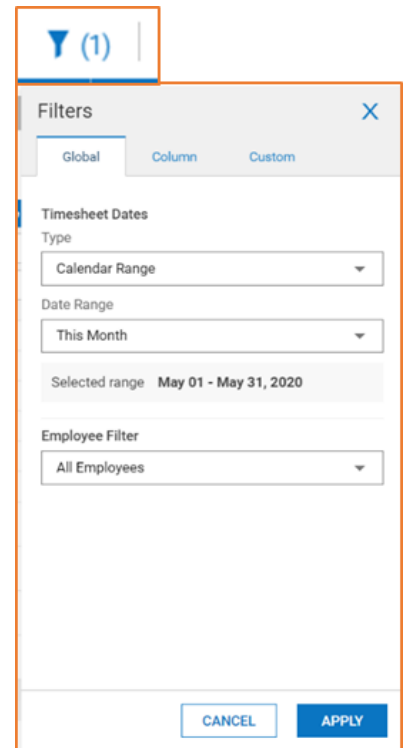
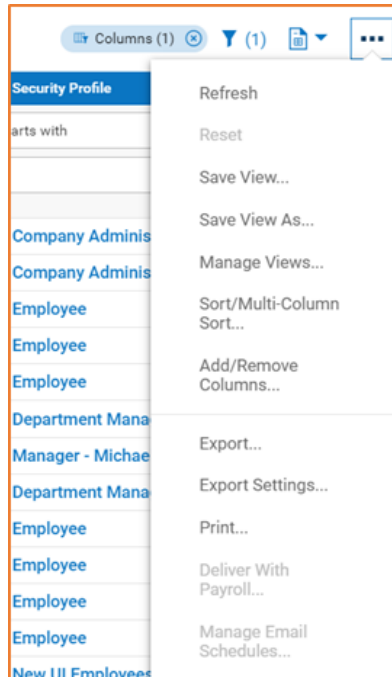
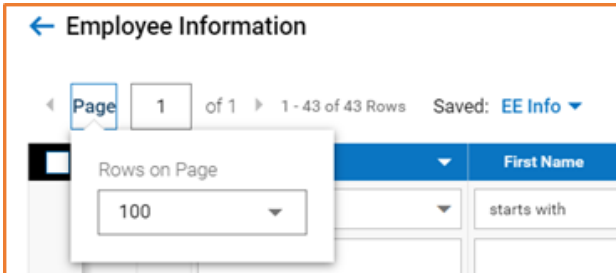
New UI Navigation Quick Guide for Managers

This Quick Guide is to help you navigate through the New User Interface (New UI) by comparing the Classic UI and the New UI through side by side views of common manager tasks.

Reporting



Reporting settings are available in the New UI, but to make the data onscreen more prevalent some settings are in the Actions and Filter menus.



Reporting- Charts & Graphs

Reporting can be transformed into Charts & Graphs making for a more visually appealing way to view the data points in the reports. These Charts & Graphs can be added to the Home or individual Module Dashboards on the system's landing page. The Charts and Graphs on the landing page have the ability to navigate to the report from the Dashboards

Add Chart ✕

Chart Type *

Bar Chart
 Line Chart
 Pie Chart
 Grid

Data

Category (Y-axis) *

+

Show as a stacked chart

Metric (X-axis) *

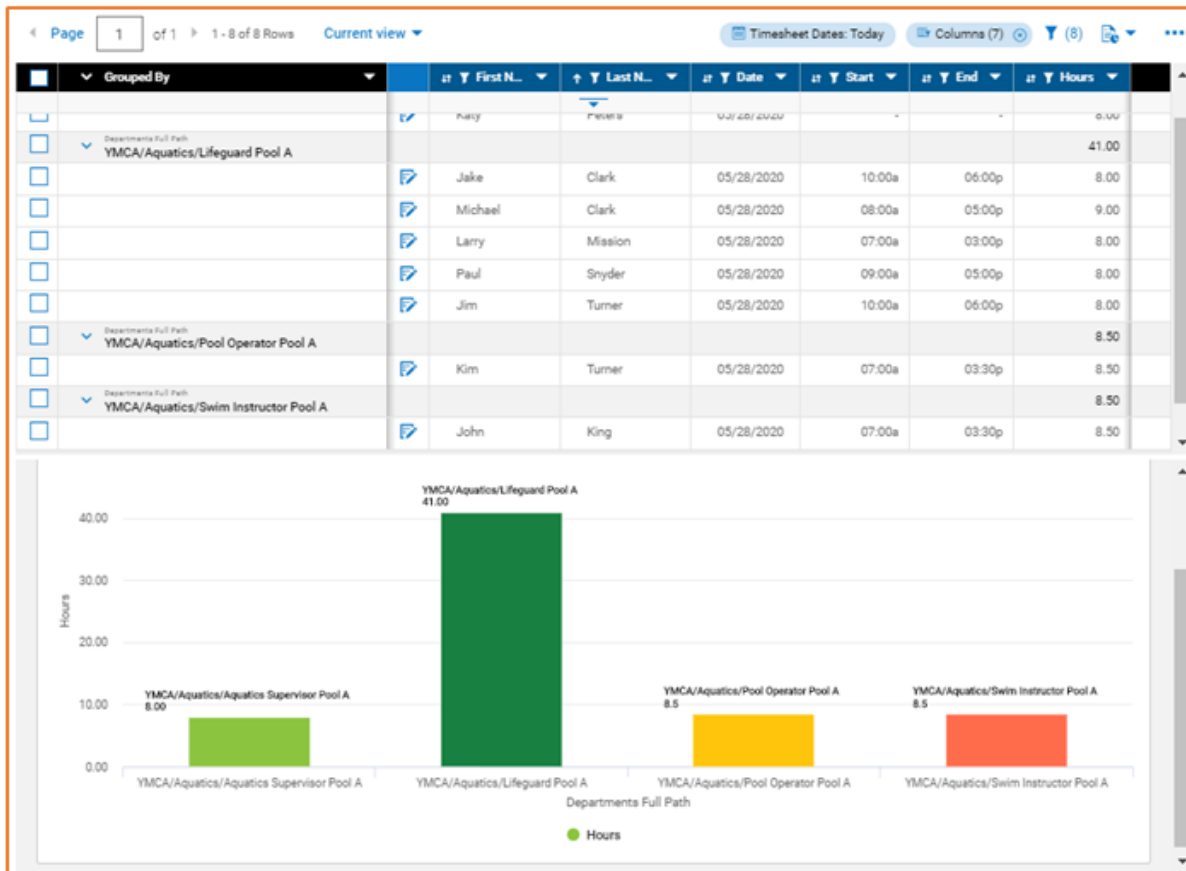
Value Calculation *

Chart Display

Category Title (Y-axis)
 Metric Title (X-axis)
 Category Labels (Y-axis)
 Data Labels (X-axis)

Title *

Hours by Departments Full Path



Time and Labor Management

Managers can review their employee's timesheets in the same manner they did in the Classic. The New UI timesheet improved view has the ability for managers to manage timesheets for their employees including easy changes to time entries and exceptions.

Back Home > Manage Time > Manage Timesheets > All Timesheet Edit

Employee: Doug Lynch (MAIN) (28) Time Sheet: June 14, 2020 - June 20, 2020

Expenses Timesheet Calc. Detail Calc. Summary Counters Summary By Day

Date	Assignment	Time Off	Notes	In Date	From	To	Raw Total	Calc. Total
SUN 14	Job 2000			Sun 14				0.00
Day Total:							0.00	0.00
MON 15	Job 2000			Mon 15	9:00a	5:00p	8.00	7.00
Day Total:							8.00	7.00
TUE 16	Job 1000			Tue 16	9:00a	5:00p	8.00	7.00
Day Total:							8.00	7.00
WED 17	Job 1000			Wed 17	9:00a	5:00p	8.00	7.00
Day Total:							8.00	7.00
THU 18	Job 2000			Thu 18	9:00a	5:00p	8.00	7.00
Day Total:							8.00	7.00
FRI 19	Job 2000			Fri 19	9:00a	5:00p	8.00	7.00
Day Total:							8.00	7.00
SAT 20	Job 2000			Sat 20				0.00
Day Total:							0.00	0.00
Timesheet Total:							40.00	35.00



← Timesheet Edit

Jake Bell June 01, 2020 - June 14, 2020 Open

Time Entry Counter Adjustments Calc Detail Calc Summary Counters Summary By Day Shift Premium Summary

Date, From	To	Raw Total	Calc. Total	In Date	Time Off	Org Levels	Locations	Notes	Schedule
MON Jun 1		08:08	07:30						09:00a - 05:00p
08:58 am	05:06 pm	08:08	07:30	MON Jun 1	Vacation	IT/Technical Support	Lowell		09:00a - 05:00p
From am	To am	00:00	00:00	MON Jun 1	Sick	IT/Technical Support	Lowell		09:00a - 05:00p
TUE Jun 2		00:00	00:00						09:00a - 05:00p
09:00 am	12:31 pm	03:31	03:00	WED Jun 3		IT/Technical Support	Lowell		09:00a - 05:00p



Timesheet Approvals can be done in the same manner depending on your process- through workflows or non-work. The best practice if using the mobile app is to utilize the workflow.

Permission	Approval State	Employee ID	First Name	Last Name	Employee EIN	Raw Hours	# Records	# Unapp
Approves	Approve	Open	1	Jane	Akins	MAIN	32.00	8
Approves	Approve	Open	101	Michael	Adams	MAIN	40.00	5
Approves	Approve	Open	1010	Josh	West	MAIN	40.00	5
Approves	Approve	Open	105	Ray	Booth	MAIN	45.00	5
Approves	Approve	Open	107	Katy	Peters	MAIN	40.00	5
Approves	Approve	Open	1111	Jake	Clark	MAIN	40.00	5



Permission	Employee ID	First Name	Last Name	Employee EIN	Raw Hours	# Records	# Unapp
Approve	26	Linda	Johnson	MAIN	40.00	5	
Approve	1111	Jake	Clark	MAIN	40.00	5	
Approve	48	Michael	Clark	MAIN	45.00	5	
Approve	12	Kim	Turner	MAIN	42.50	5	
Approve	25	Beth	Mayer	MAIN	40.00	5	
Approve	101	Michael	Adams	MAIN	40.00	5	

Workflow: Time Off Request

Employee: Larry Mission (MAIN) (114)
 Time Off: Vacation
 Date: 12/05/2019 (Monday)
 Total Hours: 8.00

REJECT **APPROVE**

Approve/Reject Time Off Request

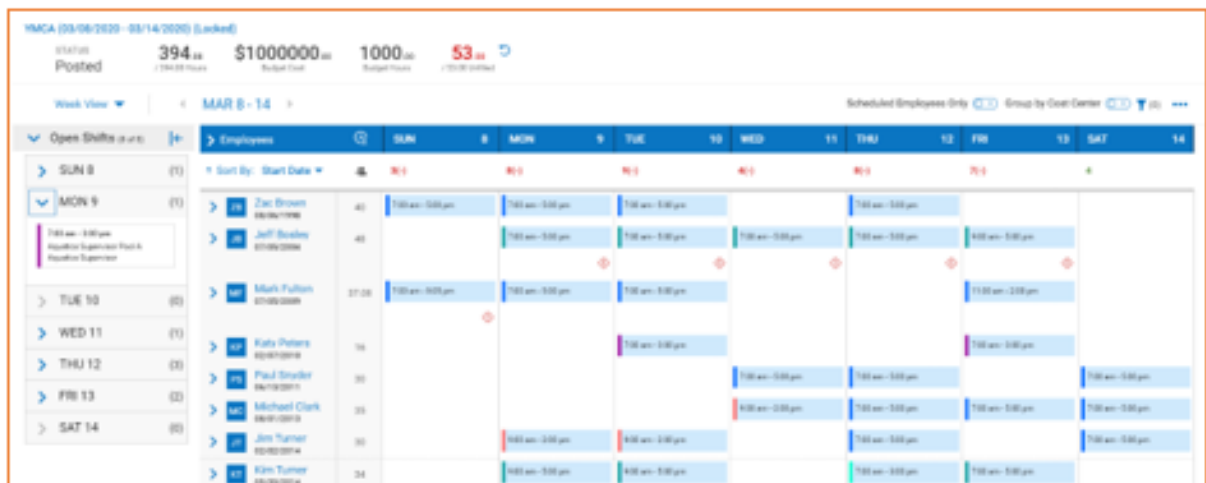
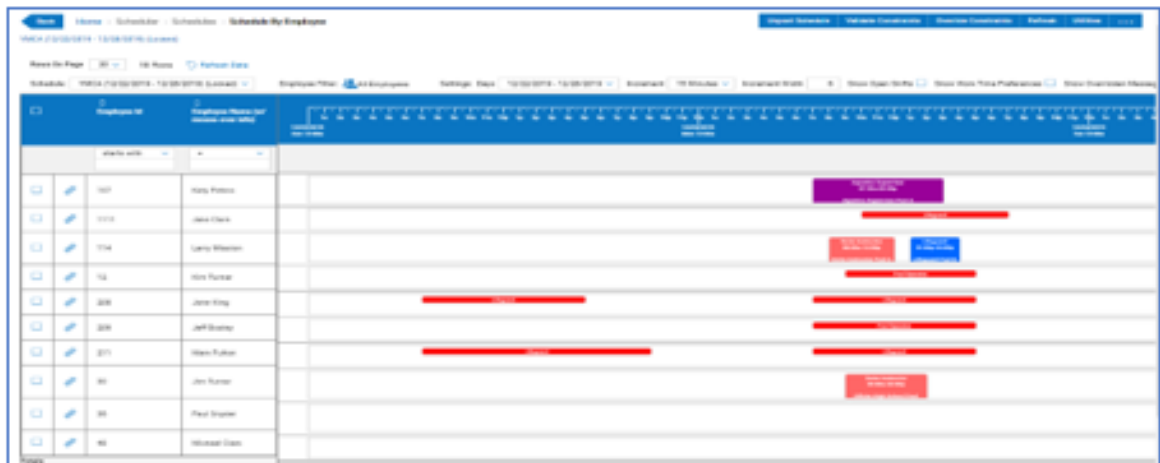
Personal
 Doug Lynch (MAIN)
 Created Dec 3, 2019, 1:29 pm

REJECT **APPROVE**



Scheduling

Scheduling functionality and views allow for easy management of your employee's schedules. The New UI provides improved functionality for edit schedules such as updated copy and paste features, improved tracking of schedule progress and budgeting, and an expandable menu of all open shifts that need to be filled. Enhancements such as adding the employee's photo (if uploaded to the profile) and using the employee's Nickname versus Legal name can help managers differentiate their employees during the scheduling process.



Recruitment

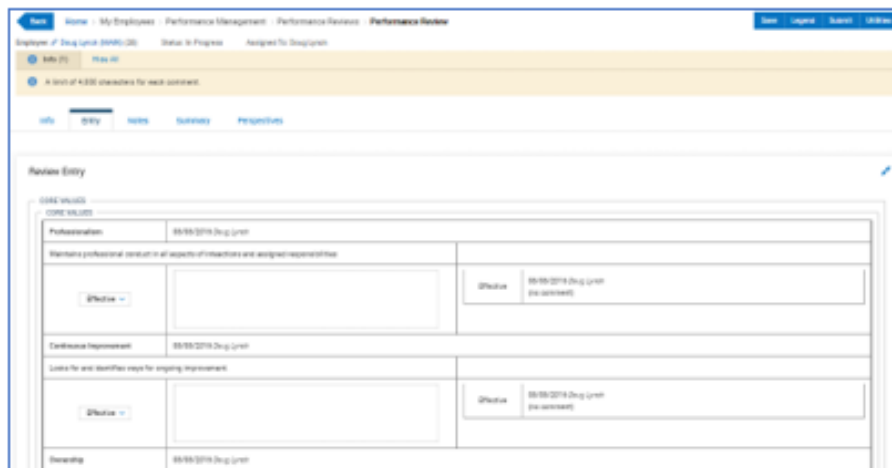
Managers can view the application process for their candidate in New UI responsive view where Hiring Stages, Resume, Application information and Questionnaires are all in one place for a simplified view. Managers can access the Job Requisition and Applicant Profile from the Job Application page the same as the process in the Classic UI.

The Recruitment New UI Dashboard Widget gives Managers a quick view at their Requisitions and where their candidates are in the process.

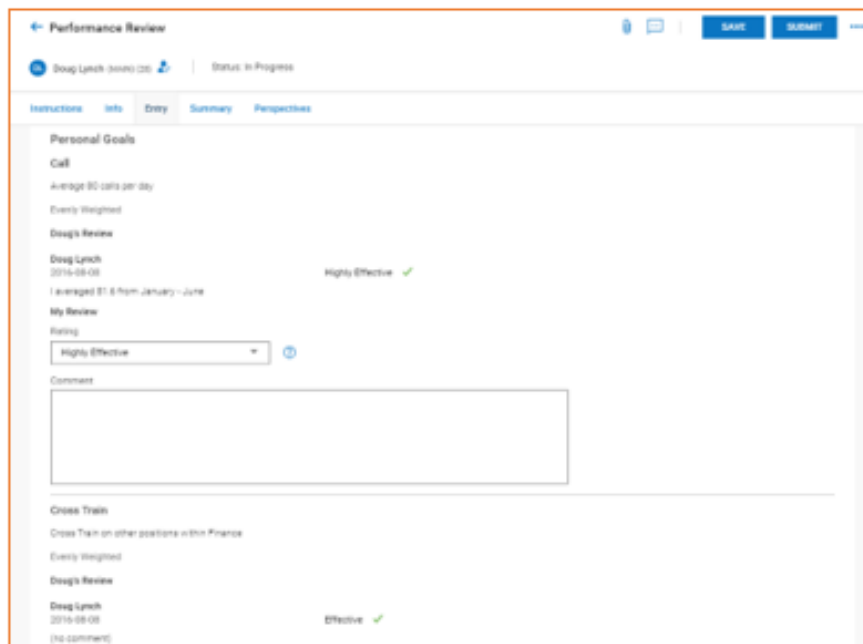


Performance

Performance Reviews have a clean, improved view for entering ratings, comments and goals throughout the review process. The new responsive UI will allow you to complete your reviews through the mobile app as well.



The screenshot shows the old Performance Review interface. It features a header with navigation links and a breadcrumb trail. Below the header, there is a section titled "Review Entry" with a "SCORE VALUES" table. The table has columns for "Performance", "Rating", and "Comments". The "Performance" column lists items like "Maintains professional conduct in all aspects of interactions and assigned responsibilities". The "Rating" column has a dropdown menu with "Effective" selected. The "Comments" column has a text input field. The interface is cluttered and lacks a clear focus on the review process.



The screenshot shows the new Performance Review interface. It features a clean, modern design with a clear focus on the review process. The interface is organized into sections: "Personal Goals", "Doug's Review", "My Review", and "Cross Train". The "Personal Goals" section lists goals like "Cell" and "Average 80 calls per day". The "Doug's Review" section shows a rating of "Highly Effective" with a green checkmark. The "My Review" section has a rating dropdown menu with "Highly Effective" selected and a comment text input field. The "Cross Train" section lists cross-training opportunities like "Cross Train on other positions within Finance". The interface is clean, easy to use, and provides a clear path for entering ratings and comments.



HR Actions

All HR Actions are housed in a new table view which allows you to easily access Available, Open and Submitted actions in one location. Completing HR Actions for tasks such as Job or Pay Changes for your employees is a simple submission through the action tracking your progression with Green Check Marks next to the completed sections.

