



New UI Navigation Quick Guide for Managers

Last Updated: August 24, 2020



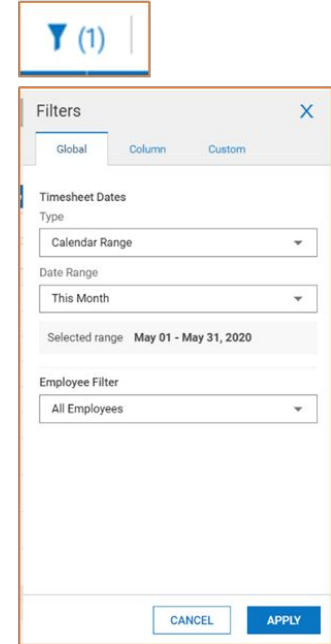
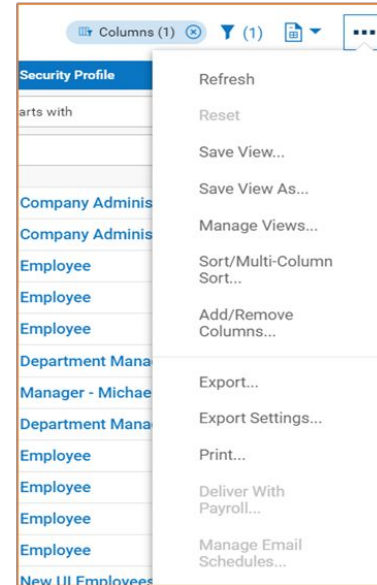
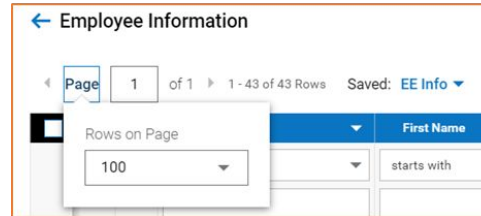
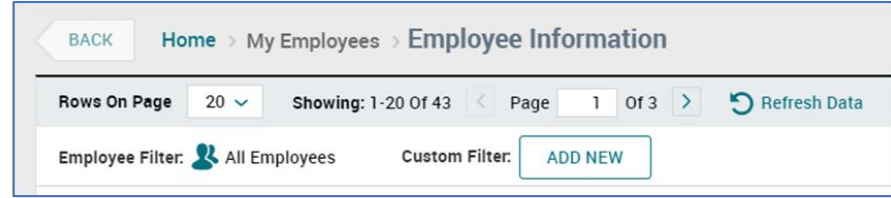
Document Overview

This quick guide is available 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 on screen more prevalent, some settings are in the Actions and Filter menus.



Time & Labor Management

Managers can review their employees' 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.



DATE	ASSIGNMENT	TIME OFF	NOTES	IN DATE	FROM	TO	RAW TOTAL	CALC TOTAL
SUN 24	X			Sun 24			8.00	8.00
							Day Total:	8.00
MON 25	X			Mon 25	9:00a	9:00p	8.00	7.00
	X			Mon 25			8.00	8.00
							Day Total:	16.00
TUE 26	X			Tue 26	9:00a	9:00p	8.00	7.00
							Day Total:	8.00
WED 27	X			Wed 27	9:00a	9:00p	8.00	7.00
							Day Total:	8.00
THU 28	X			Thu 28	9:00a	9:00p	8.00	7.00
							Day Total:	8.00
FRI 29	X			Fri 29	9:00a	9:00p	8.00	7.00
							Day Total:	8.00
SAT 30	X			Sat 30			8.00	8.00
							Day Total:	8.00
							Timesheet Total:	48.00

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
	From	am	To	pm	00:00	00:00	MON Jun 1	Sick	IT/Technical Support	Lowell
TUE Jun 2			00:00	00:00						09:00a - 05:00p
	From	am	To	pm	00:00	00:00	TUE Jun 2		IT/Technical Support	Lowell
WED Jun 3			03:31	03:00						09:00a - 05:00p
	09:00	am	12:31	pm	03:31	03:00	WED Jun 3		IT/Technical Support	Lowell

Timesheet Related Approvals

Approvals can be done in the same manner depending on your process-through workflows or non-workflow.

The best practice if using the mobile app is to utilize the workflows.

Workflow: Time Off Request

Employee: Larry Mission (MAIN) (114)
Time Off: Vacation
Date: 12/20/2019 (Monday)
Total Hours: 8.00

REJECT APPROVE

PERMISSION	EMPLOYEE ID	FIRST NAME	LAST NAME	EMPLOYEE EIN	RAW HOURS	# RECORDS	# UNAPPROVED TIME ENTRIES
Approve	26	Linda	Johnson	MAIN	40.00	5	5
Approve	1111	Jake	Clark	MAIN	40.00	5	5
Approve	48	Michael	Clark	MAIN	40.00	5	5
Approve	12	Kim	Turner	MAIN	42.50	5	5
Approve	25	Beth	Mayer	MAIN	40.00	5	5
Approve	101	Michael	Adams	MAIN	40.00	5	5



My To Do Items

Approve/Reject Time Off Request
Personal
Doug Lynch (MAIN) (26)
Created Dec 3, 2019, 1:59 pm

Approve/Reject Time Off Request
Personal
Larry Mission (MAIN)
Created Apr 11, 2019, 1:58 pm

Approve/Reject Schedule Shift C...
Number of Requests: 1
Larry Mission (MAIN)
Created Apr 4, 2019, 5:49 pm

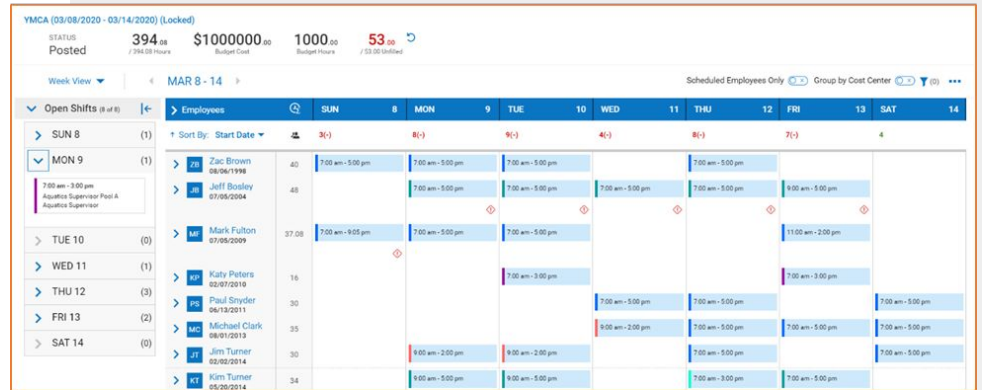
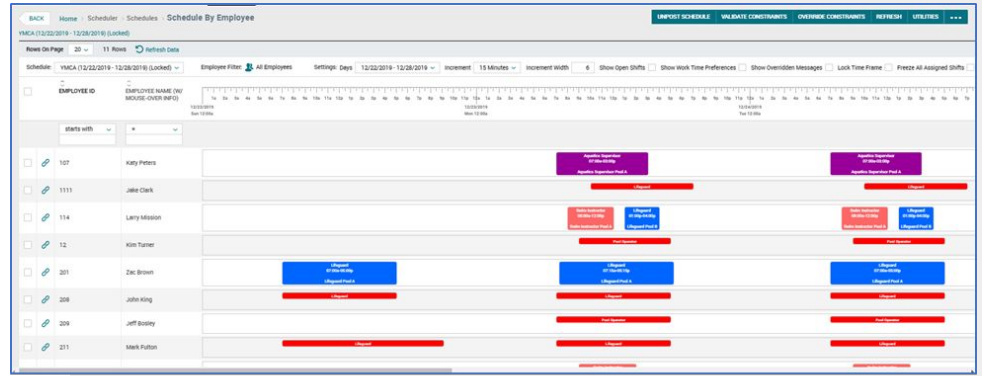
Approve/Reject Time Off Request
Personal
John King (MAIN)
Created Jan 22, 2019, 9:27 pm

REJECT APPROVE

Permission	Employee ID	First Name	Last Name	Employee EIN	Raw Hours	# Records	# Groups
Approve	26	Linda	Johnson	MAIN	40.00	5	
Approve	1111	Jake	Clark	MAIN	40.00	5	
Approve	48	Michael	Clark	MAIN	40.00	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	

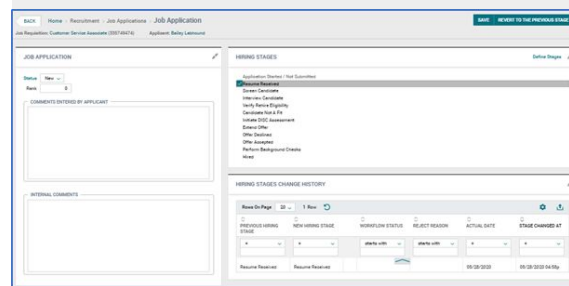
Scheduling

Scheduling functionality and views all for easy management of your employees' 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.

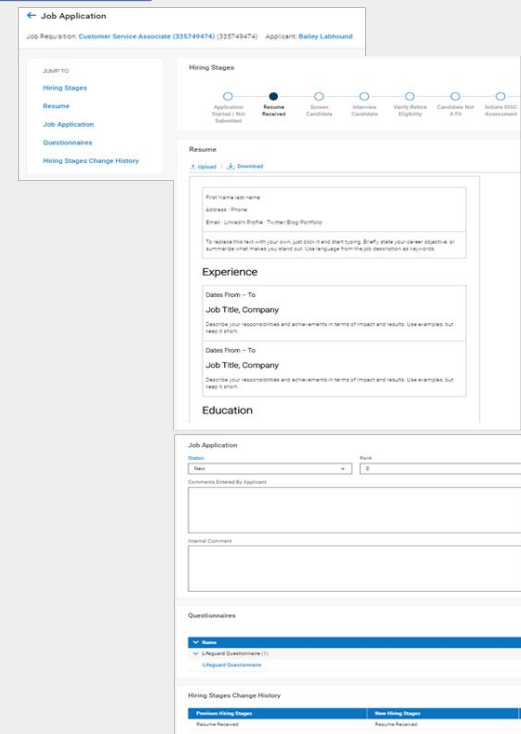
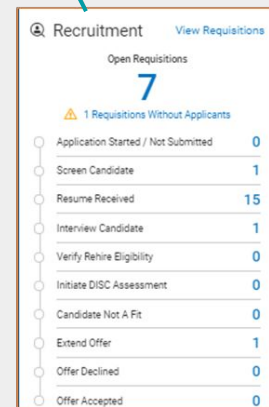


Recruitment

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

BACK Home My Employees Performance Management Performance Review Performance Review

Employee: Doug Lynch (M48) (26) Status: In Progress Assigned to Doug Lynch

Info (3) Hide All

A limit of 4,000 characters for each comment.

INFO ENTRY NOTES SUMMARY PERSPECTIVES

REVIEW ENTRY

CORE VALUES

CORE VALUES

Professionalism 08/08/2016 Doug Lynch
Maintains professional conduct in all aspects of interactions and assigned responsibilities

Effective 08/08/2016 Doug Lynch (no comment)

Continuous Improvement 08/08/2016 Doug Lynch
Looks for and identifies ways for ongoing improvement.

Effective 08/08/2016 Doug Lynch (no comment)

Ownership 08/08/2016 Doug Lynch
Takes ownership and responsibility for assigned responsibilities

Effective 08/08/2016 Doug Lynch



Performance Review

Doug Lynch (M48) (26) Status: In Progress

Instructions Info Entry Summary Perspectives

Personal Goals

Call

Average 80 calls per day

Evenly Weighted

Doug's Review

Doug Lynch 2016-08-08 Highly Effective ✓

Averages 81.6 from January - June

My Review

Rating

Highly Effective

Comment

Cross Train

Cross Train on other positions within France

Evenly Weighted

Doug's Review

Doug Lynch 2016-08-08 Effective ✓

(no comment)

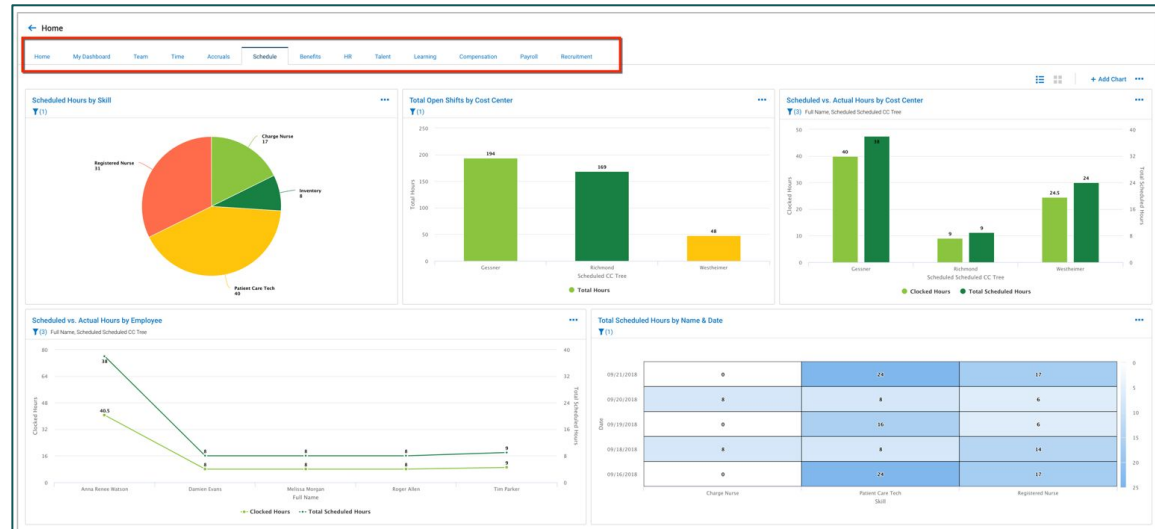
HR Actions

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.

The image displays a collage of screenshots from the HR Actions interface. At the top left, a navigation menu shows 'My Account' and 'My Employees' tabs, with a list of HR actions including Employee Maintenance, Employee Actions, Employee Payroll Maintenance, Employee HR Maintenance, Employee Leave Maintenance, Compensation Management, and Performance Management. A large blue arrow points from the 'Employee Actions' section to a sidebar menu on the right, which lists 'HR', 'Dashboard', 'HR Actions', 'Checklists', 'Forms', and 'HR Maintenance'. Below this, three screenshots illustrate the workflow: 1) 'HR ACTION REQUEST' form with fields for Employee, Effective From, and a 'CONTINUE REQUEST' button. 2) 'Job Change' form with fields for Choose Employee, Effective From, and buttons for 'CANCEL' and 'CONTINUE'. 3) 'Job Change' form showing 'Transfer Details' and 'Compensation' sections, including a table for 'Current Compensation' and a 'Pay Grade' section.

Dashboard Info - Charts & Graphs

Through the use of charts and dashboards, with the new UI, managers can create powerful visuals that will help with identifying key trends in their business.



Thank You!

Learn more about the new UI with our Webinar Series. [Visit this link](#) to register for upcoming or on-demand webinars.

Questions? Please reach out to your Client Experience Representative at michaelr@linkhcm.com