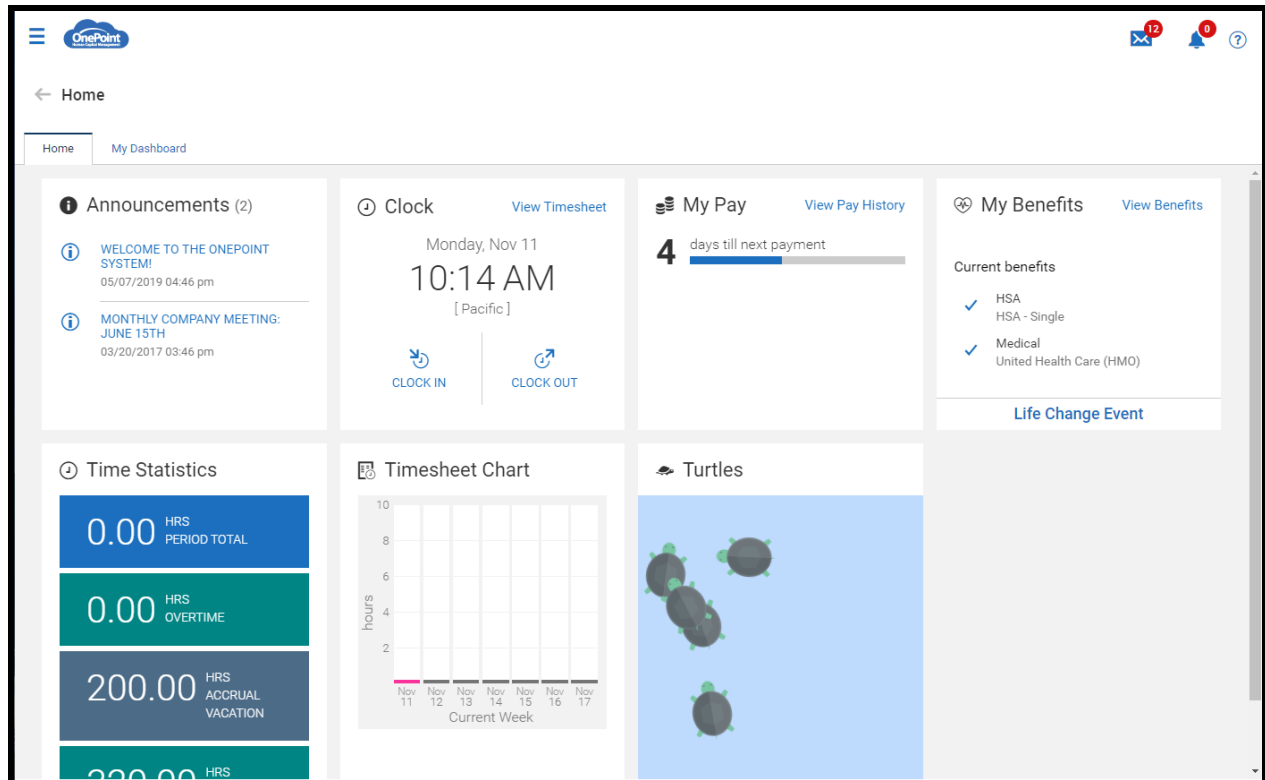





How to Setup and Configure the New UI Home Screen

The **Home Screen** is the New UI default landing screen which can be configured for a user when they first login to the system.



Assigning the Home Screen to Users

The easiest way to assign the Home Screen to a group of users is to do so by attaching the profile to the users security group.

1. From the Show Menu  in the upper left of your screen Navigate to the Admin button  then to Company Settings > Profiles/Policies > Security.
2. Click on the Pencil icon  next to the security profile you wish to assign the New UI Home Screen.
3. Change the First Screen to **New UI Dashboard (Home)** as seen in the image below.

Security Profile

Name* Employee

Description Limited system access

Active ☒

First Screen New UI Dashboard (Home)

Access Policy

TIMEOUT SETTINGS

Max Inactive Time (sec) 1800

Display Timeout Warning ☒

a.

- Repeat these steps for each security profile you wish to switch to the New UI Home Screen.

Configuring the Home Screen

In addition to assigning the Home screen on the security profile, you must also configure and assign the New UI Dashboard Layout Profile to each user. The New UI Dashboard Layout allows you to control what features of the New UI Home Screen will be available to the user. The assigned profiles can be effective-dated at the employee level if a new dashboard should take effect at a specified date.

Profiles

Access	Hourly Employees		
Accruals	Tenure Based		
Attestation		12/31/1900	+
Benefit	Standard Benefits	12/31/1900	+
Bradford Factor			
Competency			
Counter Distribution	Counter Distribution	12/31/1900	+
Demographic	Company Standard		
Employee Perspectives	Hourly Profile	12/31/1900	+
Holiday	Holiday Table		
Labor Distribution			
Leave of Absence	Medical Leave		
New UI Dashboard Layout	Manager New UI Dashboard	01/14/2019	+
	Default	12/31/1900	+
Pay Calculations*	Salaried	12/31/1900	+

The profiles are effective dated so that you can schedule dashboards to become effective as of a specified date. Any employee assigned to the profile will be subject to the dates specified.

Configuring Profiles

For each profile, options to enable dashboards and buttons are available.

The screenshot shows the 'Dashboard Layout Profile' configuration window. It is divided into three main sections: 'Dashboard Layout Profile', 'Dashboards Visibility', and 'Schedule'.
1. **Dashboard Layout Profile**: Contains a 'Name' field with 'Default' entered, a 'Description' text area, and an 'Active' checkbox which is checked.
2. **Dashboards Visibility**: Contains three checkboxes, all of which are checked: 'Show Home Dashboard', 'Show My Dashboard', and 'Show Module Dashboards'. Below these is a 'HAMBURGER MENU SETTINGS' section with two checkboxes, 'Show Home Button' and 'Show Classic Dashboard Button', both of which are also checked.
3. **Schedule**: Features a blue bar labeled 'EFFECTIVE FROM/TO'. Below this bar are two date input fields: the first contains '12/31/1900' and the second contains '12/31/9999'. There are edit icons (pencil) for each date field and a plus icon (+) to the right of the second date field.

- **Show Home Dashboard** – Checking this option enables the premium dashboard that may have been configured and used within the Classic UI.
- **Show My Dashboard** – Checking this option enables the New UI Dashboard Layout when the user logs on.
- **Show Module Dashboards** – Checking this option allows managers to view and/or create dashboards under each enabled module under the Team menu. i.e. Time has a dashboard, Accruals has a dashboard, Schedule has a dashboard, etc. Under these dashboards, managers can add Report Charts that provide important information at a glance and will update in real time.

Hamburger Menu Settings

- **Show Home Button** – Checking this option will enable the Home button within the hamburger menu, and when tapped by the user, will display the New UI Dashboard.
- **Show Classic Dashboard Button** – Checking this option will enable the Dashboard button within the hamburger menu, and when tapped by the user, will display their assigned Classic UI dashboard.
- **Schedule** – Dashboard Layout Profiles can be effective-dated, and more than one time period can be added by clicking the Plus (+) sign and adding a new effective date. The profiles will become active as the dates roll up. Click the edit icon to open the dashboard to add/remove widgets.

Schedule

This dashboard contains only one (1) column to save space/scrolling since it can be used within the Mobile App. The *Available Windows* can be dragged and arranged in the desired order.



The user will see all the configured Available Windows on their Home view when logging in to the Mobile App. Shown below are descriptions and examples of the dashboard widgets on a user's home page.

Available Widgets

- **Clock** – This widget will display the current day, date, time, and user's time zone. This widget is typically used by users who need to punch in/out or transfer to another cost center. A *View Timesheet* link will take users to their current timesheet.
- **Announcements** – This widget is useful for communicating company information to all your users through the use of announcements, which can be configured under *Company Settings > Our Company > Announcements*. Users can tap the Info icon or arrow to read the announcement.
- **Benefits** – This widget will display the user's current benefit enrollments. A *View Benefits* link will allow the user to view their current benefits. When viewing benefits, two tabs will display, one for viewing Benefit Plans and the other for Enrollment in benefits.

- **Pay** – This widget will display a countdown until the next pay. A *View Pay History* link will allow the user to view their recent and historical pay statements. When viewing pay, two tabs will display, one for Pay History and the other for Direct Deposit. Users can add new direct deposits from the Direct Deposit tab, and e-signatures are available, and when signed, the employee will receive their pay statements electronically.
- **My Applicant Profile** – This widget works with the New Applicant Portal and is part of the HR Recruitment module. This widget cannot be used with the Mobile App and is only accessible from a browser, although a browser from a mobile device can be used. Applicants will get the Default New UI Dashboard Profile that is created by default when the New UI is enabled for a company, enabling them to create applicant profiles and apply for jobs. You can find more details about how to use this functionality in the Recruitment/Talent Acquisition User Guide.
- **Recruitment** – For companies using the Recruitment module Marketplace product, this widget can provide HR professionals with information about job requisitions, open requisitions, and the status of the open requisitions. Selectable links are available to view more details.
- **Succession Chart** - For HR companies using Succession Management, the Succession widget can be added to managers. The Succession tile pulls data from the user's talent matrix widget which can be configured, for now, in the Classic UI. Managers can use this tile to gauge readiness and benchmark the strength of their team for possibly filling higher level positions as they become available.
- **Timesheet Chart** – This widget will display a graph of the employee's currently calculated hours for the current days of the current week. If there are no hours registered, the bars will not display. The current day will be highlighted. The chart will continually update as hours are added to the timesheet.
- **Time Statistics** – This widget will display the configured time elements defined in the widget. The statistics will continually update as hours are added or removed. The *Time Statistic* widget contains additional settings, accessed by clicking the *Gear* icon.

Edit Settings

Display ☒

Label Period Total

Type Time Entry Based

Time Type Calculated Period Pay Period

Display ☒

Label Accrual Vacation

Type Accrual Based

Time Off

Display ☒

Label Period Extra Pay

Type Counter Based

Counters

Display ☒

Label Overtime

Type Counter Based

Counters

- **Display** – Uncheck to not display this type of time statistic to the user on their dashboard widget.
- **Label** – Allows you to customize the name of this type of time statistic the user will see.
- **Type** – The type of time to show the user. Options include Time Entry Based, Counter Based, and Accrual Based.
- **Time Type** – The category of the time to show the user. Options include Calculated, Raw, and Pay Category.
- **Period** – The period of time to show the user. Options include Pay Period and Weekly.