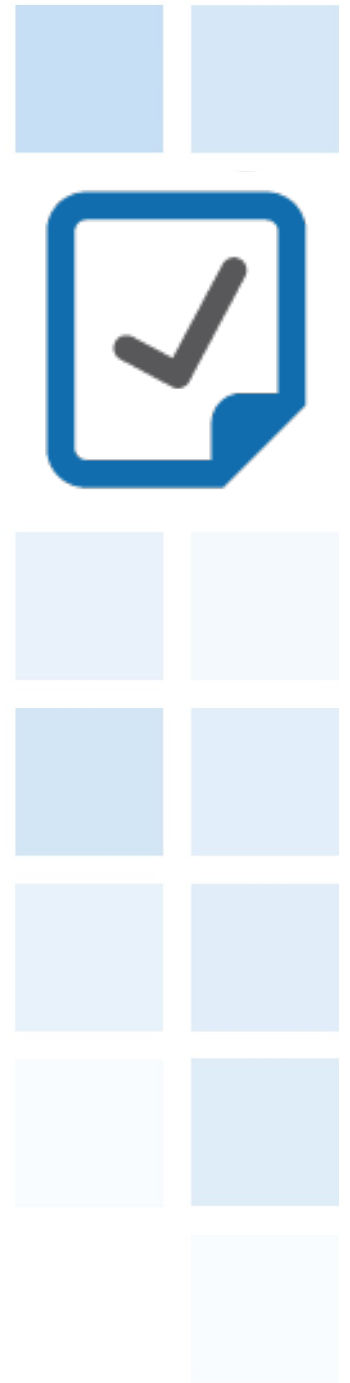




System Documentation

OnePoint Human Capital Management

How To Enable and Configure the New UI Mobile App



How To Enable and Configure the New UI Mobile App

This new user interface, or New UI, provides a simplified experience that will provide you and your employees with a fresh look and experience. The new Mobile App can be downloaded for your mobile device. This new App works independently of the previous Mobile App and independently of your desktop experience.

In this user guide you will find the steps to:

[Enable the New UI for mobile users](#)

[Enable Touch ID](#)

[Enable Punch Settings for mobile users](#)

[Enable Geo Fencing for mobile users](#)

Mobile Device Support

The new UI mobile experience will be supported for Android and iOS devices. The table below shows which mobile operating systems that are supported with the new UI.

<u>OS</u>	<u>OS version</u>
iOS	Latest version
Android	6.01 and newer

Important Considerations before enabling the New UI Mobile App.

The Mobile App will only support users who have the following configured:

Timesheet Profiles – The only supported profiles are Start/End (All Days) and Bulk Hours.

Timesheet Workflows – Approvals will only be available when using workflows. These workflows must be assigned to the appropriate profile.

Enabling workflows for your solution isn't difficult – but there are two important things to note before you do. **All timesheets must be approved, and you can't revert back to old ways once you start using them.**

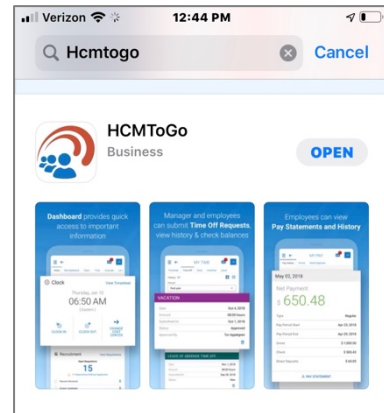
Download the HCMToGo Mobile App

The HCMToGo Mobile app is available on mobile devices. To download the app from your phone follow the below steps:

1. Access respective App Store (Apple Store or Google Play)
2. Search for HCMToGo
3. Once app is found in the store click download or install

[Apple Store Link:](#)

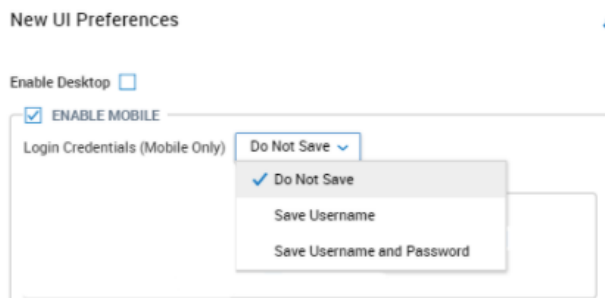
[Google Play:](#)



Enable the New UI Preferences for Mobile

The *New UI Preferences widget* is located in the security profiles. This settings will allow companies to enable users assigned to the affected security profile to be able to use the new UI and Mobile App. This widget also allows companies to configure how login credentials will be handled.

1. Navigate to Company Settings > Profiles/Policies > Security
2. Locate the Security Profile you will be enabling the New UI for mobile on and select the Edit button.
3. Within the security profile, on the left side scroll down until you find the New UI Preferences widget. Check the box that states "Enable Mobile".



4. Next set the Login Credentials. These options allow system administrators to determine if they wish to have some or all the login credentials saved, which limits the amount of login credentials required by the user. Login credentials are saved for 90 days.
 - **Do Not Save** – This option will not save usernames or passwords, requiring the user to enter their credentials with each log in.
 - **Save Username** – This option will save the usernames only, and require users to enter their passwords with each log in.
 - **Save Username and Password** – This option will save both the username and passwords, so users can log in without having to enter their credentials with each log in. This option will display a message warning that this option can result in a high risk or unauthorized access to sensitive data. **Credentials will be saved for 90 days.**

Enable Touch ID

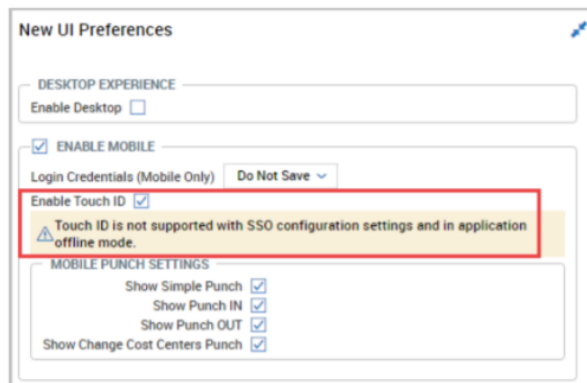
The Touch ID login that is available on most mobile devices is now available for the new Mobile App. This functionality is enabled within the New UI Preferences widget on the main page of user security profiles.

NOTE: Currently, iPhone X is not supported. If VCA (Virtual Code Authentication) is enabled, Touch ID can still be used once user enters their VCA credentials.

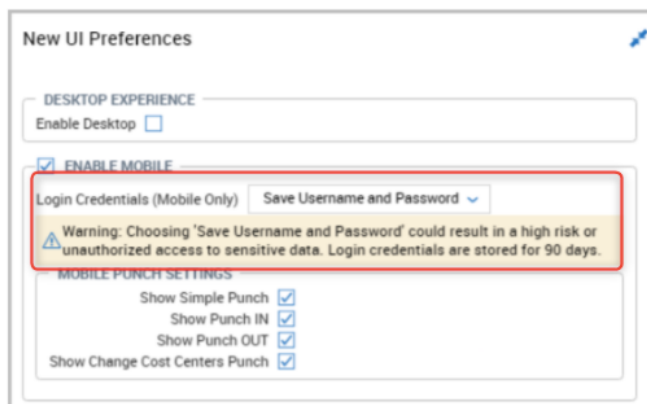
To enable the Touch ID follow the below steps:

1. First you will need to Enable the New UI Mobile Preferences
2. Next check mark the box to enable Touch ID. Note: When **Do Not Save** or **Save Username** is selected for the *Login Credentials (Mobile Only)* setting, the option to **Enable Touch ID** becomes available for selection. If selecting **Save Username and Password**, **Enable Touch ID** will **not** be available as an option.

When checking the Enable Touch ID setting to enable Touch ID, a warning message will display indicating that Touch ID is not supported when SSO (Single Sign On) is enabled or when the application is in offline mode.

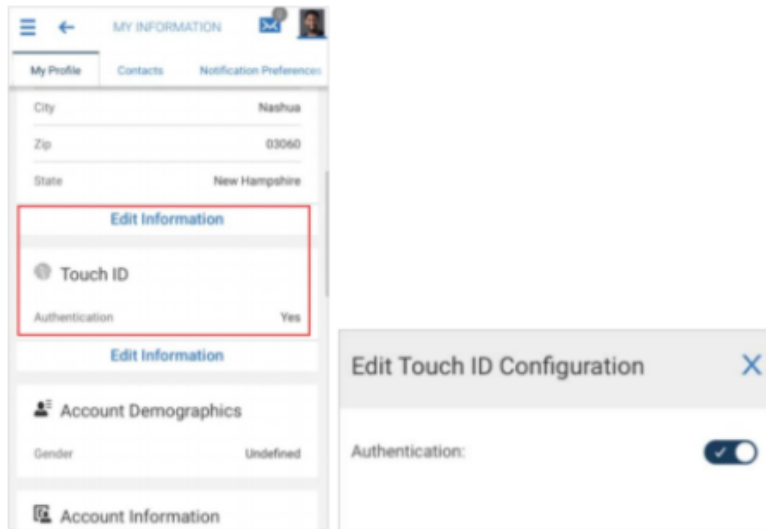


When the Save Username and Password setting is selected for the Login Credentials (Mobile Only) setting, a different warning will display.



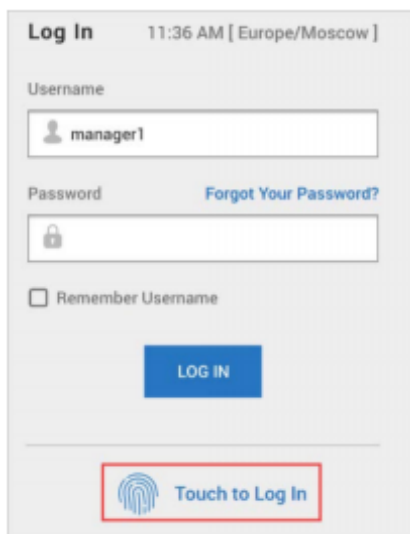
Employee Touch ID Widget

Once security is properly configured, employees will have a Touch ID widget available under their My Profile section. This widget will allow employees to turn off/on Touch ID authentication. When clicking the Edit Information link, users can turn authentication off/on. In the widget, when authentication is on, Yes will be displayed; when off, No will be displayed.



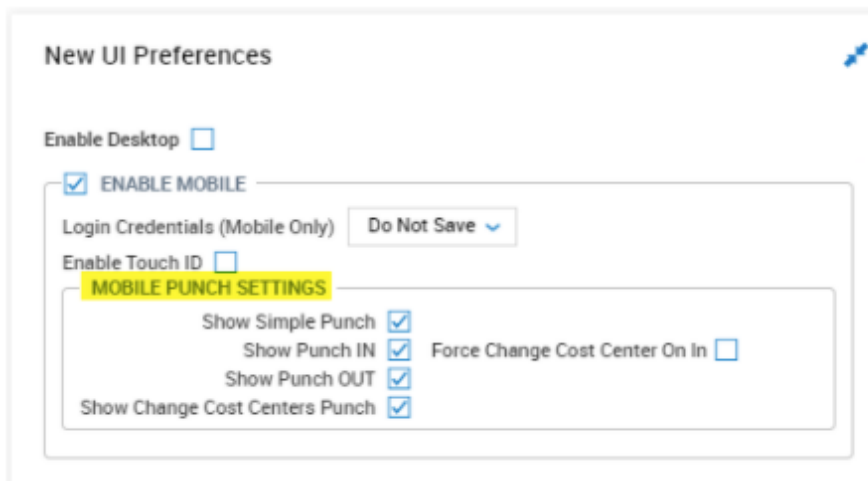
New Mobile App

When a user logs in for the first time, they will need to enter their Username/Password, initially. The Touch ID button will display and employees can use it to log in after entering their initial credentials the first time. Once the employee activates the Touch ID link, users will receive a verification to inform them they can use their fingerprint to log in.

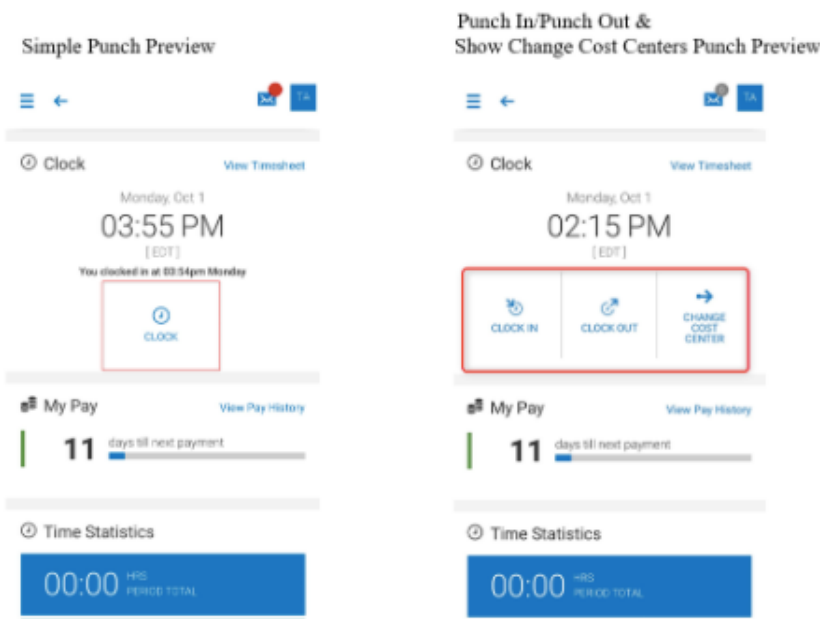


Enable Punch Settings

Companies can restrict or allow specific mobile punching options for users of the New UI. These settings are found in the Mobile Punch Settings section of the New UI Preferences widget in security profiles.



- **Show Simple Punch** - This enables the clock in, clock out, and change cost center buttons to be combined as one option on the clock widget in the mobile app.
- **Show Punch IN** - This enables the clock in button on the employee's timesheet.
- **Show Punch OUT** - This enables the clock out button on the employee's timesheet.



NOTE: If the Mobile Punch Settings are enabled and employees cannot see the punch buttons on the mobile app, verify that the Punch Settings are configured on the employees Timesheet Profiles.

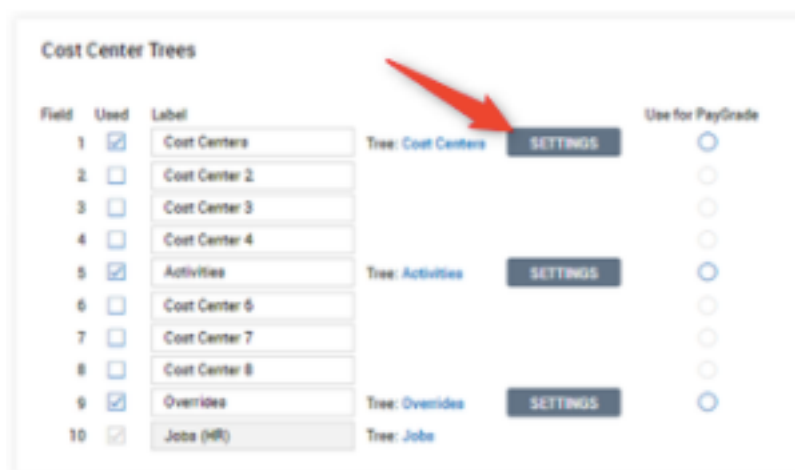
Enable GeoFencing and enter Cost Center Addresses

Below are steps to set up Geofencing, add Cost Center addresses and the rules to determine if a punch is within the configured radius are as follows:

1. First, a cost center tree will need to be configured with addresses. To enable this, navigate to the Cost Center Trees widget. Company Settings > Global Setup the Cost Center Trees widget is usually found on the Company Config tab but it can be added to any tab, using Edit Tabs. Within the Cost Center Trees widget click the SETTINGS button for the Cost Center that will be utilized for addresses. Once in the SETTINGS of the Cost Center scroll to the lower part of the page and locate the LEVELS section. Within the Levels check off the Address box. You can check the box for a specific level of the cost center or for all the levels.

****Note:** for Payroll users the Address should only be enabled on one Cost Center Tree (Example: If you have a tree for Departments and a separate for Locations only enable the address in one of the two trees.) Once enabled click save and click the Edit Tree hyperlink next to the cost center name field. This will take you to the list of cost centers. Click on a cost center and you will see the Cost Center Properties for the cost center to the right of the screen. Locate the Contacts widget and then enter a valid address and click save.

2. The address of the Scheduled Cost Center will be used to determine the punch location, if available. If there is no Scheduled Cost Center, the employee's default Cost Center will be used. To view the addresses in the Cost Centers navigate to Company Settings > Global Setup > Cost Centers.
3. If there are multiple cost centers associated with the punch, the cost center with the highest priority is used. Cost Center priorities are defined in the Cost Center trees SETTINGS.



Cost Center Tree

Name: Cost Centers Edit Tree

Priority: 1 - Highest Priority

Default Priority: 5 ?

Levels: 3

Contact 1 Label:

Contact 2 Label:

Display On Applicant Tracking:

Is Schedulable:

Use for Time Off Planning:

SYSTEM DISPLAY SETTINGS

Lookup Type: Lookup With Type-In

Lookup Default View: Tree

Display As: Full Path

Type-In Validation Uses: External to Name Path

CUSTOM FIELDS

Use?	Label	Lookup List To Use
<input type="checkbox"/>	<input type="text"/>	-NONE-
<input type="checkbox"/>	<input type="text"/>	-NONE-
<input type="checkbox"/>	<input type="text"/>	-NONE-
<input type="checkbox"/>	<input type="text"/>	-NONE-
<input type="checkbox"/>	<input type="text"/>	-NONE-

LEVELS

	LABEL	ADDRESS	CONTACT 1	CONTACT 2	DEFAULTS	MANNING	JOB COSTING	SKILLS/JOB SETTINGS	BANK ACCOUNTS OVERRIDES	DELIVERY POLICIES OVERRIDES	CHECK SETTINGS	WORKERS COMP.
1	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. The final step to enable Geo Fencing is to add the timesheet rule(s). Enabling the Check Distance rule within the Timesheet Rules. To enable these rules follow the below steps.
 - a. Navigate to Company Settings > Profiles/Policies > Timesheets, click edit on the timesheet profile this rule will be added to.
 - b. Click the View/Edit Rules button located at the top right of the profile screen.
 - c. Click Add Rule, filter for the Check Distance rule within the On Punch category. Select the flag next to the rule.

Timesheet Rules Lookup ✕

Rows On Page: 100 | 1 Row ⚙️ 📄

Click here to expand grouped columns

Name	Description
like check dist	like

Category: On Punch Ungroup

<input checked="" type="checkbox"/>	Check Distance
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- d. Edit and configure the rule as desired. If you wish to use geo fence for both in and out punches, you will need to add two of these rules. When one or two rules have been added click save.

Check Distance

⚠ The rule is applied only to the punches done through the mobile application.

On **Punch In**

Less Than **0.0** **KM** From **Working Cost Center**

Use Company Address as a fallback if punch has no Cost Centers defined

Description:
Provides the ability to restrict punches or the changing of a cost center from a mobile device. When configured, the system will check the company address or the cost center associated with the time entry. This cost center may be one of the 10 potential default cost centers, the scheduled cost center or the cost center the user is currently working under (working cost center). Change Cost Center action will be interpreted as Punch In.

Save **Cancel**

Note: if the address associated with a Cost Center is empty or incomplete, the system uses the Cost Center at the next level up until the address is resolved. If the address cannot be resolved from the Cost Center tree, the “Invalid employee location is provided” error message is displayed. This same error message will display if the punch is outside the restricted zone.

