UKG WFM User Guide - Employee

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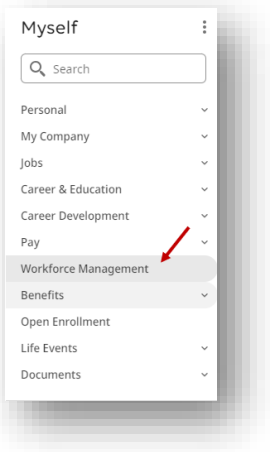
Workforce Management

Workforce Management is the section of the UKG platform where users request and track work time and time off. This is also where leaders approve work time and time off requests. In this section, you will find step by step instructions for accessing and using UKG Workforce Management.

Access Workforce Management

Access Workforce Management by selecting Workforce Management from the menu located on left side of the UKG Pro landing page.



TIME SAVING TIP

Workforce Management can also be saved in Favorite and My Shortcut Menus.

The Workforce Management screen will open as a new tab in your browser. **If you are asked for login credentials for Workforce Management, follow the trouble shooting instructions below.**

TROUBLE SHOOTING

Begin by clearing cache by clicking CTRL+Shift+Delete. Use the "Advanced" tab and select the time range "All Time". Then, log out and log back into UKG.

If the issue still exists email john.doe@gmail.com

The tiles located on the Workforce Management landing page will vary based on the users' role.

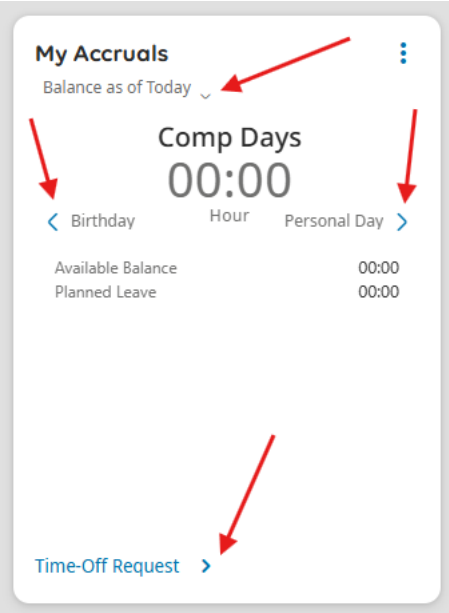
Use Workforce Management tiles or the menu in the upper left corner of the Workforce Management page to navigate.

Click the home icon or UFCW logo to return to the Workforce Management landing page.

Requesting Time Off

Request time off by selecting “Time-Off Request” in the “My Accruals” tile of the Workforce Management landing page.

Use the arrows to review available time by type:



You can also see your balance in the past/future by clicking on the drop-down arrow by “Balance as of Today” and select a date in the past/future. The system will project future grants and takings.

“Planned Leave” refers to any future time-off requests that are planned for the future.

Select the type of Leave and the date or dates and click “Apply”. At the top of the screen, view the number of dates selected at the top of the screen (see next page).

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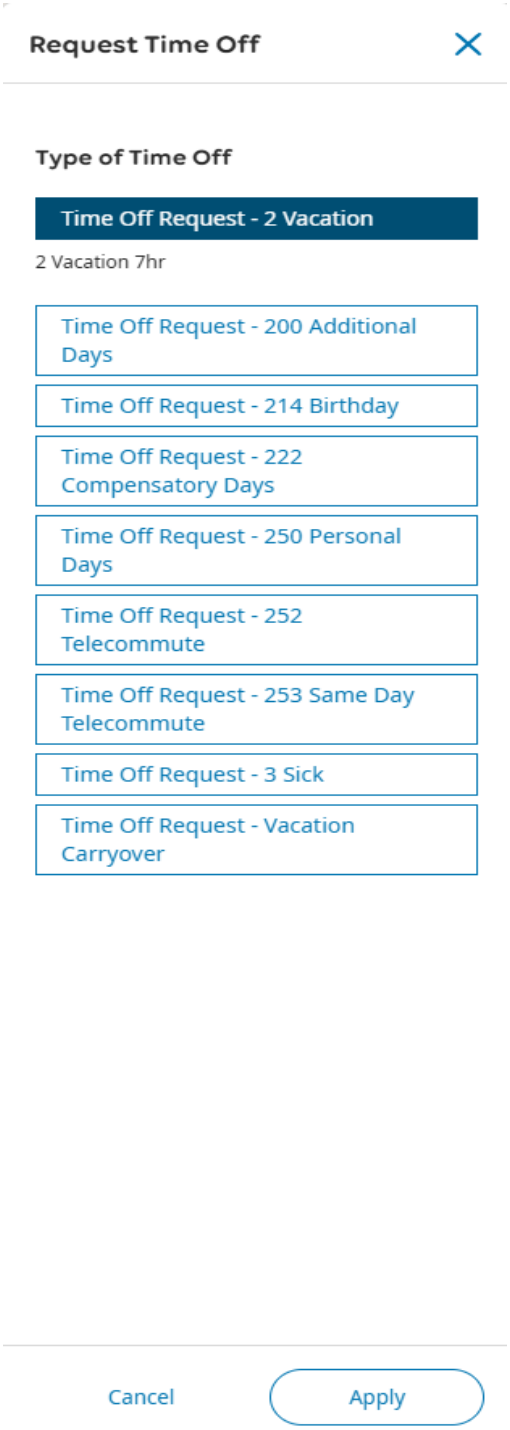
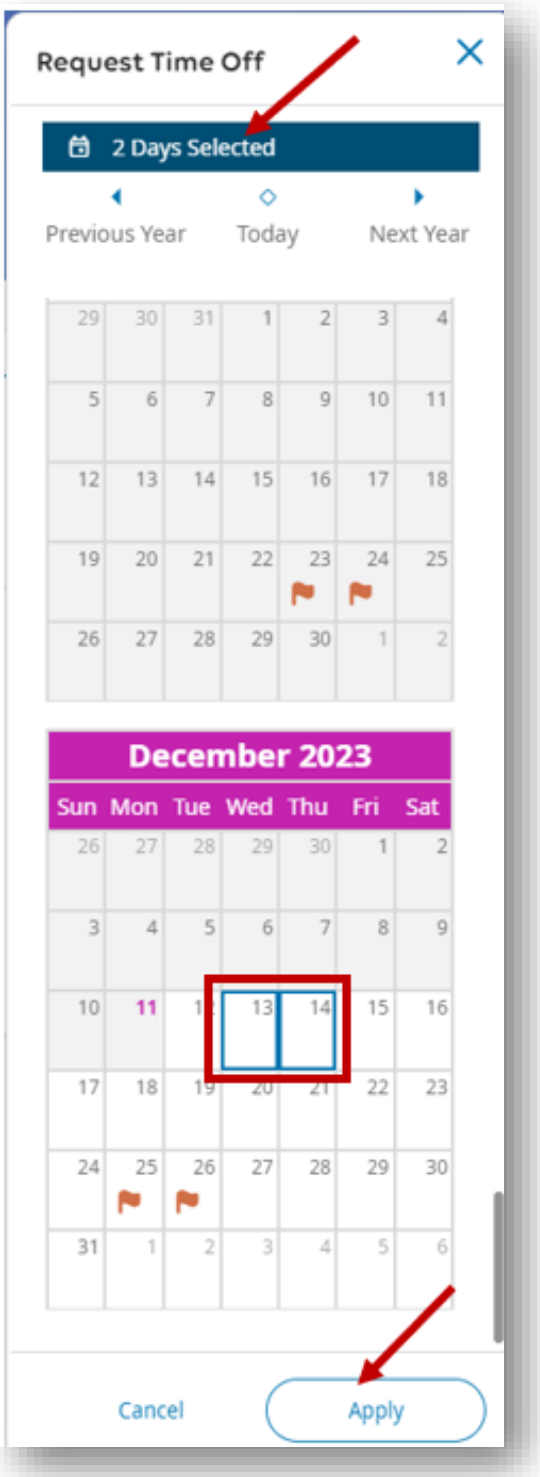
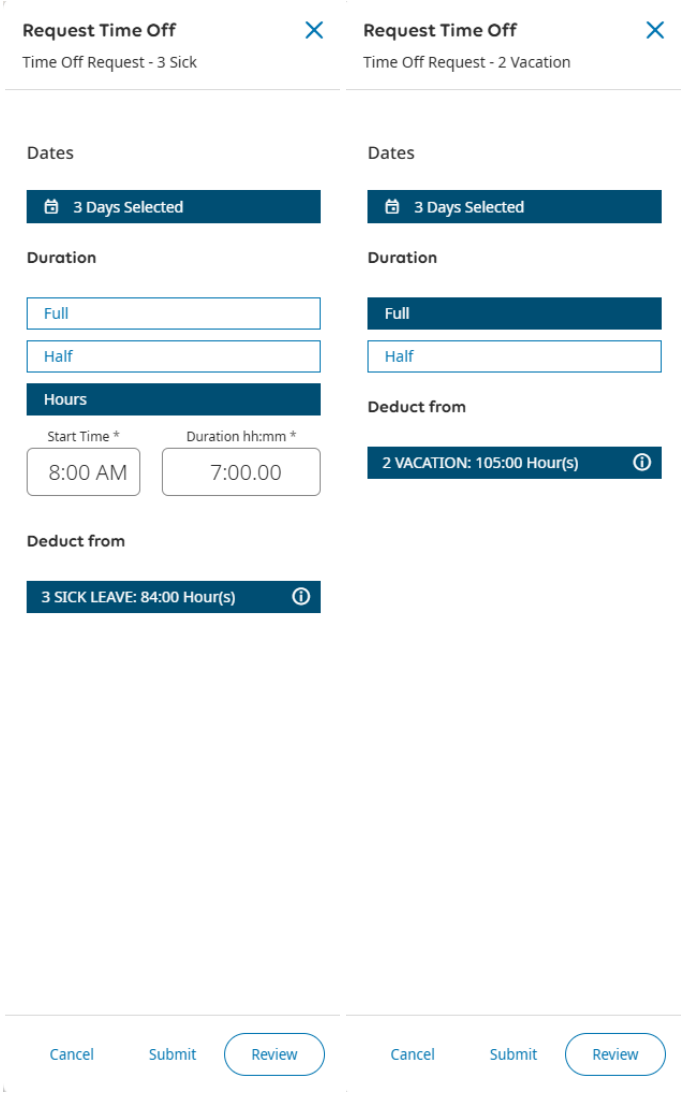

Request Time Off
Type of Time Off
Time Off Request - 2 Vacation
2 Vacation 7hr
Time Off Request - 200 Additional Days
Time Off Request - 214 Birthday
Time Off Request - 222 Compensatory Days
Time Off Request - 250 Personal Days
Time Off Request - 252 Telecommute
Time Off Request - 253 Same Day Telecommute
Time Off Request - 3 Sick
Time Off Request - Vacation Carryover
Cancel
Apply


Request Time Off
2 Days Selected
Previous Year
Today
Next Year
December 2023
Sun Mon Tue Wed Thu Fri Sat
Cancel
Apply

Select Duration. Depending on the Accrual Selected, different options for Duration will be available.

Select time off type and click “Submit” or “Review”.



By selecting “Review”, users can review requests and add comments. Choose “Other” from the drop-down menu and add a comment. Then, click “Submit.”

TIME OFF REQUEST TIPS

If requesting multiple days, duration per day must be the same. *For instance, if a user is taking two full days and one-half day, the half day must be requested separately.*

UNPAID TIME OFF

Employees must request unpaid time off through their direct manager. Managers will enter unpaid time off it is approved.

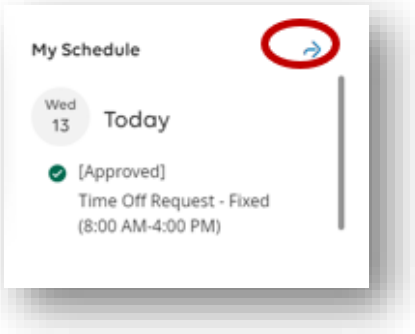
Users will receive confirmation the time request was submited.

Click “Done” or “Cancel Request”.

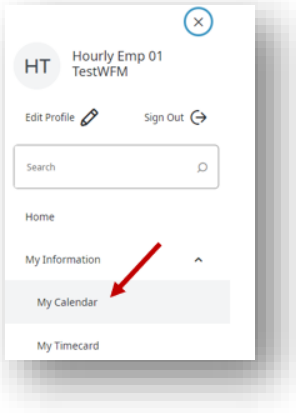
TIME OFF REQUEST NOTIFICATION

Users will receive a notification on the landing page with status on the request. Click the bell in the upper right corner to review the notification.

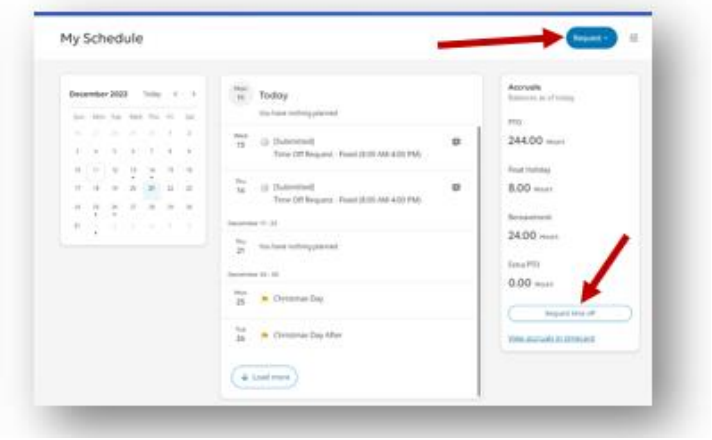
Time off requests can also be initiated through the “My Schedule” tile or through the menu located in upper left corner of the Workforce Management landing page.



If time off requests are initated through the menu, select “My Calendar”.



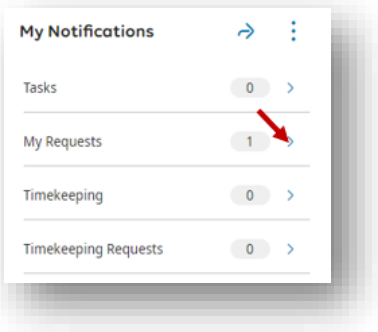
Use the “Request” button at the top of the page or select “Request time off” in the “Accruals” section.



Follow the steps above to complete the time off request.

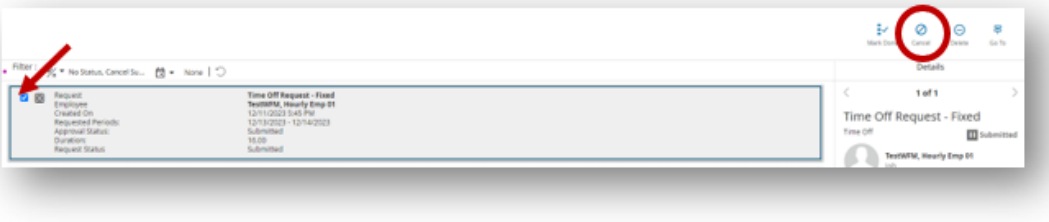
Cancel Time Off Request

Cancel a time off request by selecting “My Requests” from the “My Notifcations” tile on the Workforce Management landing page.

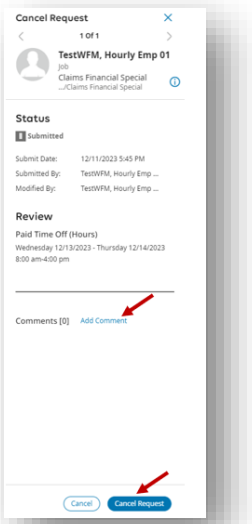


Check the box next to the appropriate request to select it.

Click “Cancel” in the upper right corner.

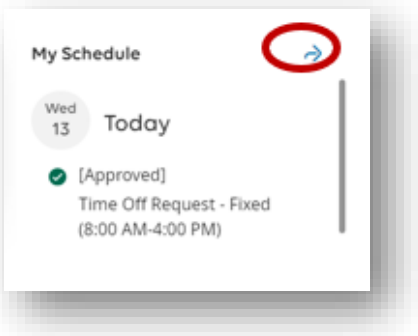


Add comments if needed and click “Cancel Request”.

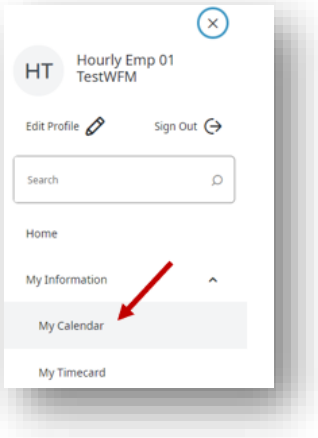


If the request has already been approved, the manager will approve or reject the cancellation request.

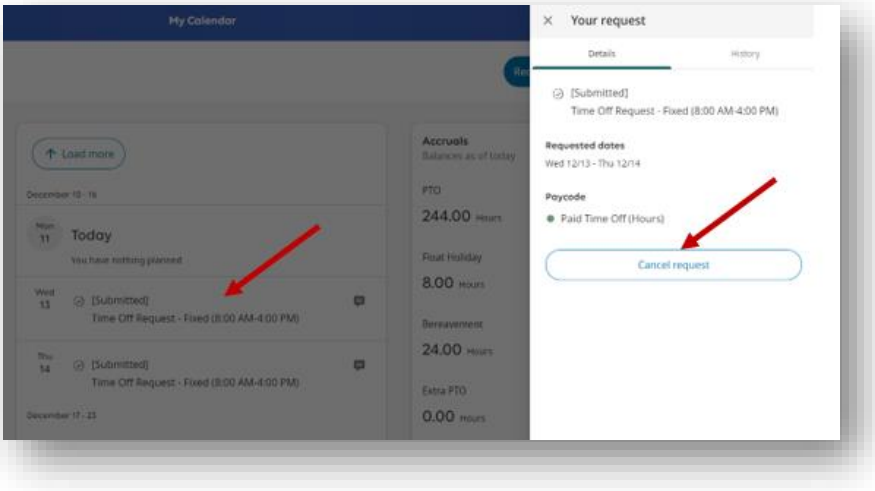
Time off requests can also be cancelled through the “My Schedule” tile on the Workforce Management landing page or through the menu located in upper left corner of the Workforce Management landing page.



Users initiating cancellation using the menu will select “My Calendar”.

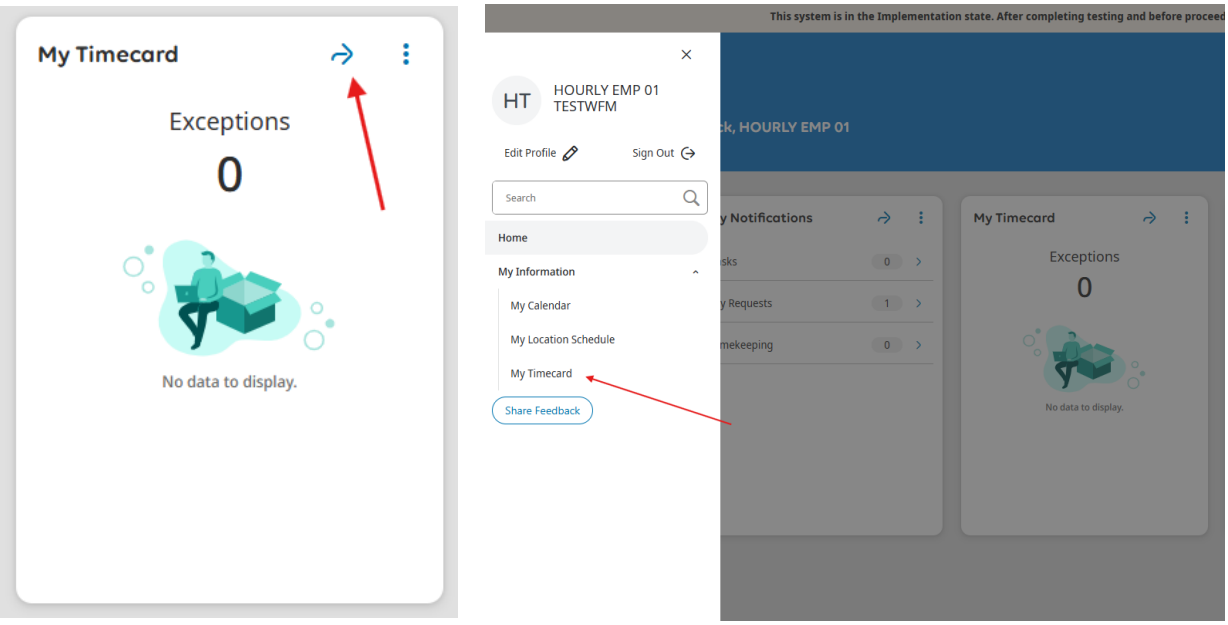


Select the request and click “Cancel Request”.

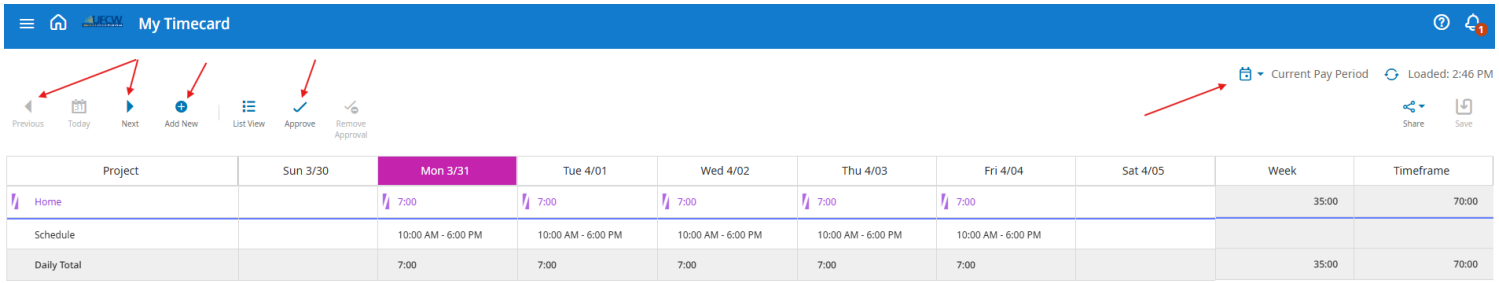


Recording Time

To access the timecard, click on the arrow as shown below. You can also access through the menu.



Once you have selected the timecard, this will be your base view. There will be a pre-populated schedule in purple.

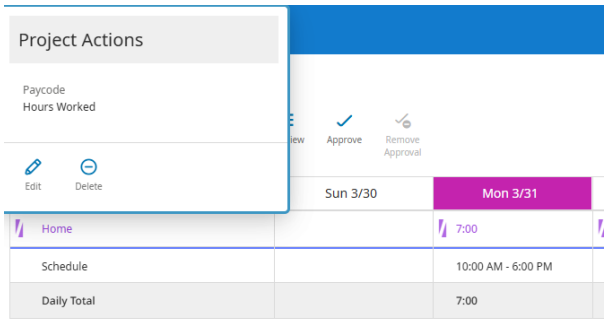


On the top-left, you can navigate between the two weeks within the biweekly pay period. On the right-hand, you can change the pay period you are looking at. You will see your daily hours on the bottom, as well as your weekly and biweekly hours on the right. This will be pre-populated with the schedule.

As part of your responsibilities, this time must be allocated. There are a few ways to go about this.

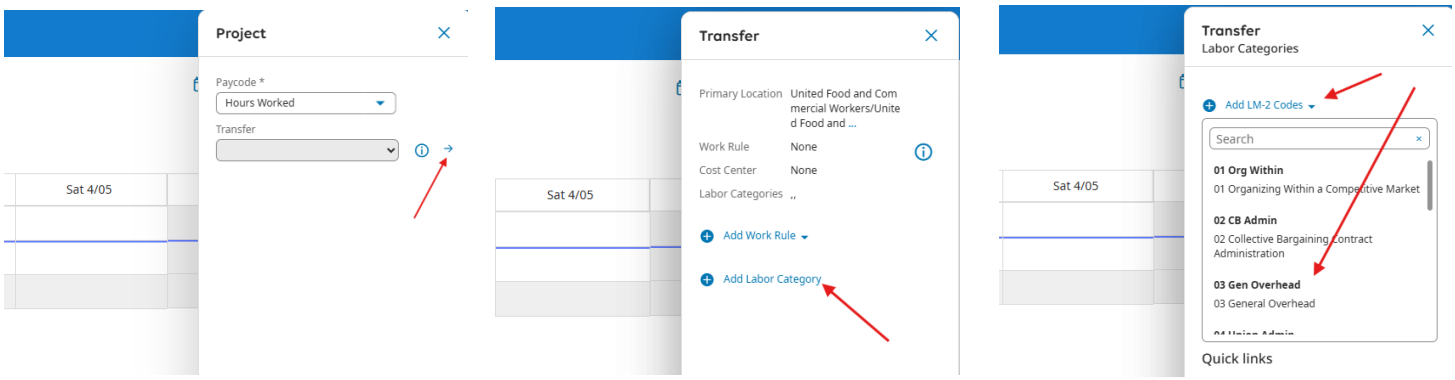
Right-Click on “Home” in purple, and select edit.

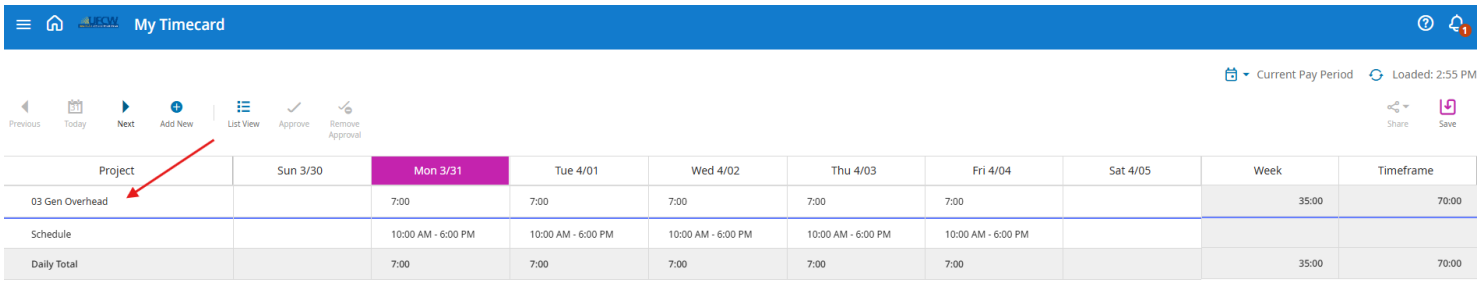
Once you have selected edit, you will keep “Hours Worked” as your pay code. Now, you will need to “Transfer” your hours to the LM2 code. You will click the arrow next to transfer.



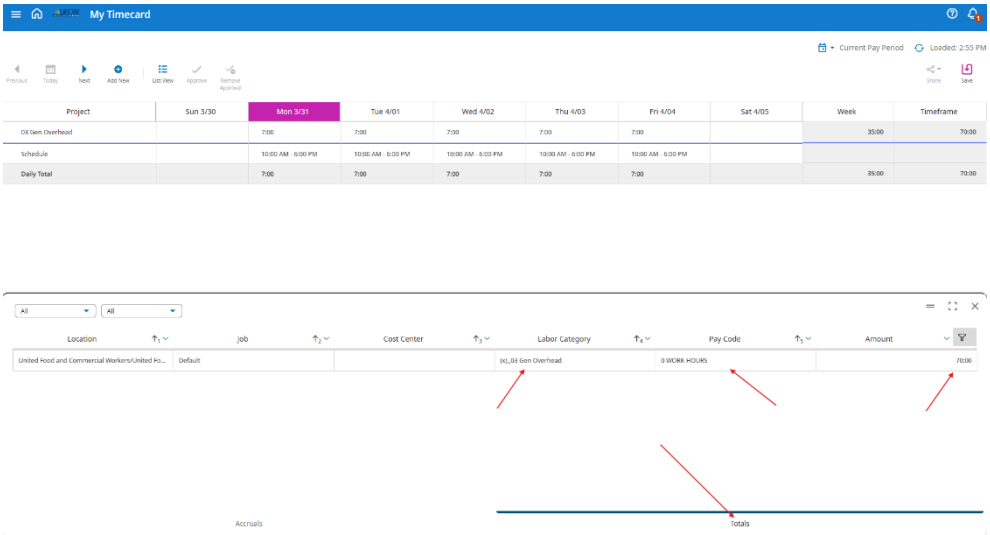
As you can see, for the moment, the drop-down box for “Transfer” is grayed out. This is because you have never made any selections before. Once you have done this process, these items will show in the drop down for easier access.

After clicking the arrow, you will click on “Labor Category”. From there, click on “Add LM-2 Codes”, and select the code you need to allocate to. Click okay at the bottom, and then click on apply to add it to your timecard.

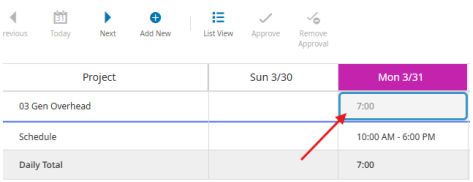




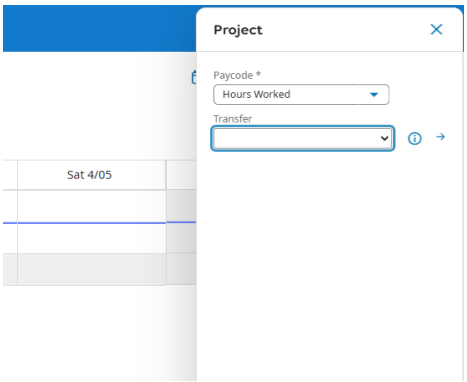
Now you will see that “Home” has been replaced by the LM-2 Code you have selected. This now means all of my hours worked are allocated to 03 General Overhead, for example. You can see this in “Totals” at the bottom of the screen as well. Here you can see the totals of your hours for the period, the pay code, and the LM-2 Code they are allocated to (in “Labor Categories”).

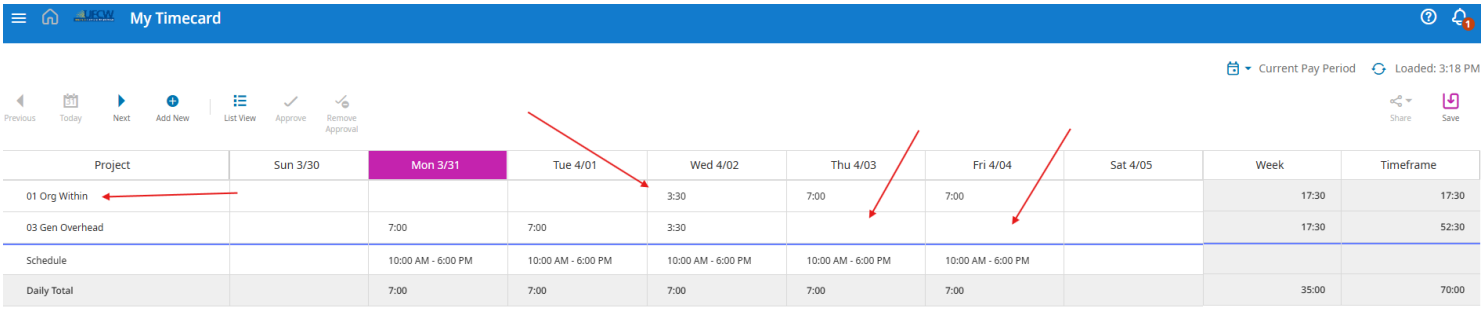


You can click directly into the day and allocation if you need to adjust your hours worked. Just click on the hours under the day that needs adjusted, and you can type in the amount of hours.



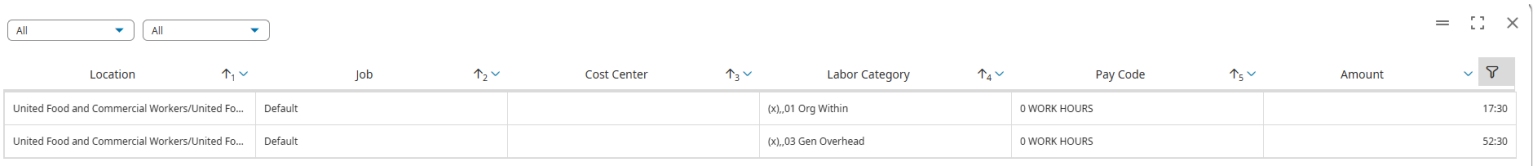
If there are days within the pay period in which you need to split your work hours between different LM-2 Codes, click on “Add New” at the top. You will again add “Hours Worked”. Now you will notice that the “Transfer” box is no longer grayed out. If I were to select the drop down, 03 General Overhead would be available for me to pick directly, as I have recently used it. As you use the system more and more, the options you use most will be available in the drop-down, and you will not have to click on the arrow to navigate to the full list of LM-2 Codes. You will follow the same steps as above, and I am going to add a separate LM-2 Code.



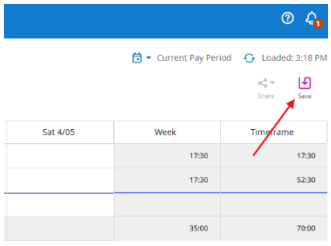


You now see the new LM-2 Code on the right. Here is an example of splitting hours during a work week. When doing this, you will need to delete/update the hours under the other allocation, to make sure you are allocating 7 hours/day, unless you are working overtime. You will do this as noted above, by simply clicking in the cell with the hours. The system accepts/recognizes both decimals and HH:MM when entering time, so you could enter 3.5 or 3:30 for half-a-day.

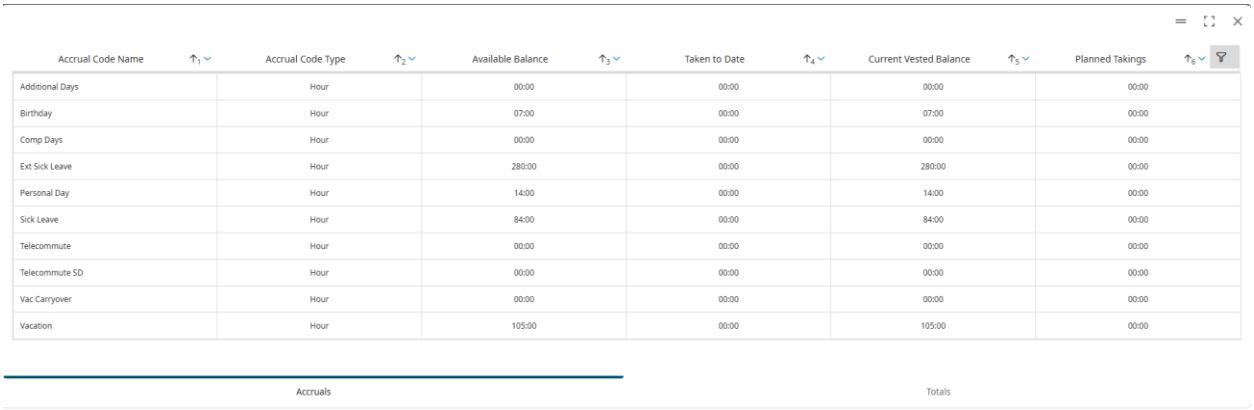
As this has been done, you can now see how this updates what you see in totals. It will split the hours into 2 rows, as you have used a different LM-2 code to allocate your hours.



When you are completed updating your timecard, REMEMBER TO SAVE. It is in the top right-hand corner, and if the button shows as purple, that means changes have been made, and you will need to save them.



You can also click on “Accruals” at the bottom of the screen, next to “Totals”, which will show your different accruals, the available balance, how much has been taken to date, and how much is planned for the future.

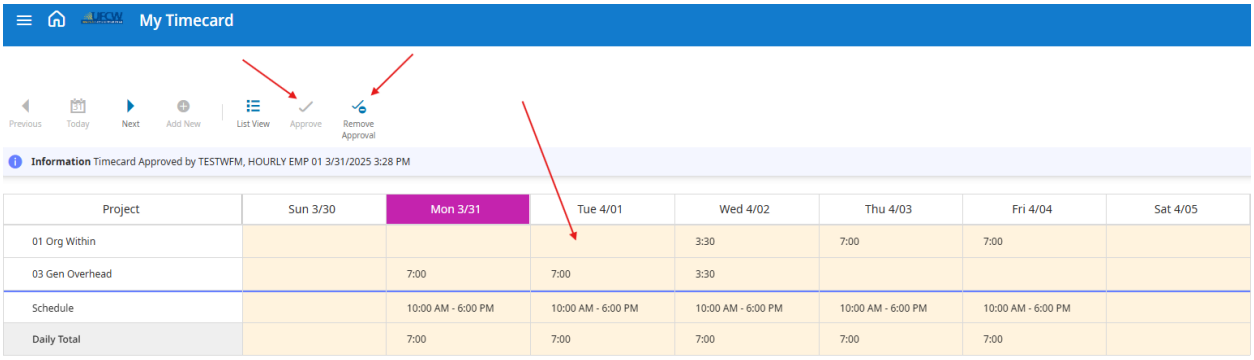


Accrual Code Name	Accrual Code Type	Available Balance	Taken to Date	Current Vested Balance	Planned Takings
Additional Days	Hour	00:00	00:00	00:00	00:00
Birthday	Hour	07:00	00:00	07:00	00:00
Comp Days	Hour	00:00	00:00	00:00	00:00
Ext Sick Leave	Hour	280:00	00:00	280:00	00:00
Personal Day	Hour	14:00	00:00	14:00	00:00
Sick Leave	Hour	84:00	00:00	84:00	00:00
Telecommute	Hour	00:00	00:00	00:00	00:00
Telecommute SD	Hour	00:00	00:00	00:00	00:00
Vac Carryover	Hour	00:00	00:00	00:00	00:00
Vacation	Hour	105:00	00:00	105:00	00:00

Accruals Totals

The last step for timecards is when the end of the current pay period is coming to a close, you will need to “Approve” of your timecard, letting the system know you have reviewed your timecard for the last 2 weeks, and everything looks to be correct. The “Approve” button is at the top of the screen, and when you click “Approve”, you will notice the background color of the timecard will change. The timecard is expected to be approved at the end of every pay period during the year. Notifications will be sent out as a reminder to both complete and approve your timecard.

Once the timecard has been approved, notice the “Add New” button is grayed out, and I can no longer click into cells and make changes to hours worked. If you need to make changes after approval, you will need to click on “Remove Approval”, make the changes, and “Approve” again, in a timely fashion.

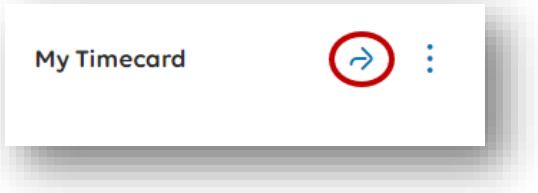


Project	Sun 3/30	Mon 3/31	Tue 4/01	Wed 4/02	Thu 4/03	Fri 4/04	Sat 4/05
01 Org Within				3:30	7:00	7:00	
03 Gen Overhead		7:00	7:00	3:30			
Schedule		10:00 AM - 6:00 PM	10:00 AM - 6:00 PM	10:00 AM - 6:00 PM	10:00 AM - 6:00 PM	10:00 AM - 6:00 PM	
Daily Total		7:00	7:00	7:00	7:00	7:00	

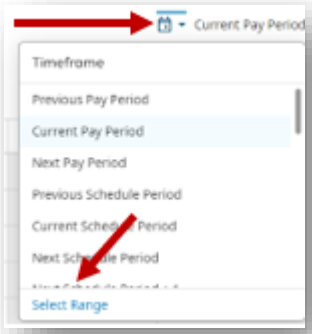
One other note on timecards: Holidays and Time-Off will be pre-populated on timecards. These do not have to be entered as employees. As well, you do not need to allocate LM-2 Codes for these days, the system will do that on its own. You are just responsible for allocating your own work hours.

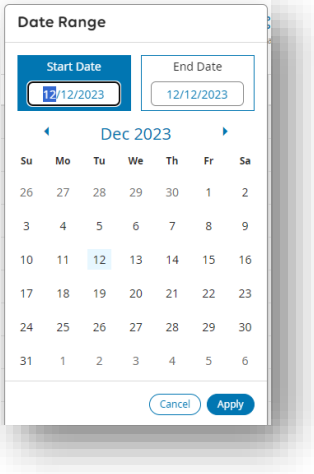
Editing Recorded Time or Adding a Comment

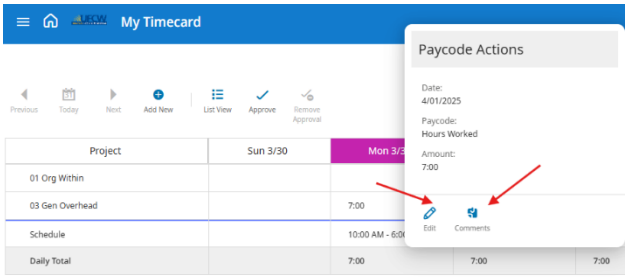
Edit recorded time or add a comment by selecting the arrow in the “My Timecard” tile located in the Workforce Management landing page.



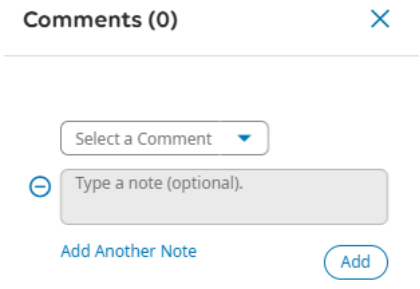
Locate hours you want to attach a comment to. Users may need to adjust the dates by clicking the calendar in the upper right corner of the “My Timecard” page. A customized date range can be selected by clicking “Select Range”.

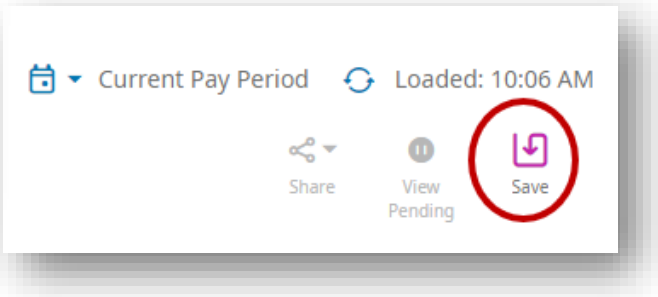






Right click the appropriate hours and select “Edit” or add “Comments”. Clicking on “Edit” will allow you to change the amount of hours. Click on “Comments” will allow you to select a comment type, and then add your comment. When done, select “Add” and then either “Add Another Note”, or click okay at the bottom. And once again, with any changes to your timecard, REMEMBER TO SAVE.





FAQs

1. How do I unlock my account? *Send an email request to*

2. What is the Company Access Code:

3. How do I update incorrect information in my Employee Summary? *Send an email request to*

4. How do I add unpaid time off? *Unpaid time off requests are entered by your manager. See Adding Paid or Unpaid Time Off.*

5. How do I clear cache? *Click Ctrl-Shift-Delete. Click the Advanced tab. Select the Time range of "All Time". Check off Browsing History, Download history, Cookies and other site data and Cached images and files. All other selections should remain unchecked. Click Clear data. Close the browser session and open a new one.*

6. What does “Anticipated Awards” mean on the “My Time Off” tile in Workforce Management? *Anticipated Awards are projected time off hours from today's date through the end of the year. Your anticipated awards right now will display what is projected to be awarded to you each pay period for the rest of the year.*

7. Is there a UKG app? *Yes, we will be getting the UKG app during the second phase of the transition. Once the app is available, we will communicate this and provide user support.*