

USER GROUP SESSION SUMMARY

UKG Ready – Custom Forms & HR Actions

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OVERVIEW:

This User Group session focused on UKG Ready HR Actions & Custom Forms. Our presenters, Sability's Deidra Ochoa and Melissa Zillmer, provided live demonstrations of various aspects of HR Actions and Custom Forms within UKG Ready.

HR ACTIONS:

The two types of HR Actions with UKG Ready include:

1. **My Employee Action Request:** Manager requests a change on an employee's record (E.g. hire, re-hire, terminate, job change)
2. **My Information Action Request:** Employee requests a change on their profile (E.g. employee information, emergency contact, direct deposit, custom form)

In the test environment, the team demonstrated the process of setting up an HR Action and how to apply security, use custom forms, create HR Action workflows, and the view of HR Actions for managers and employees.

CUSTOM FORMS:

Custom forms can be attached to areas of the system:

- | | |
|---------------|---------------------|
| 1. Checklists | 3. Scheduled Events |
| 2. HR Actions | 4. Applicant Form |

In the test environment, the presenters shared the use of custom forms, how to add new forms, and various specifics within the forms such as field types, sign-field mapping, conditional rules and security, and custom form workflows and reports.

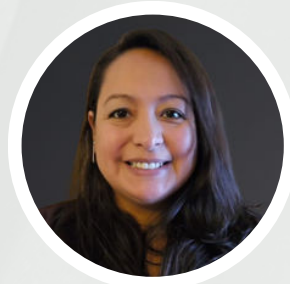


PRESENTERS



**DEIDRA
OCHOA**

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Manager, UKG Ready



**MELISSA
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Sability Consultant,
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FULL SESSION!**

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USER GROUP:

If you're interested in participating in our next User Group session, join our LinkedIn Group "Sability UKG User Group" or reach us at customersuccess@sability.com