December 4, 2018 (UltiPro v12.3.2)

UltiPro Mobile App

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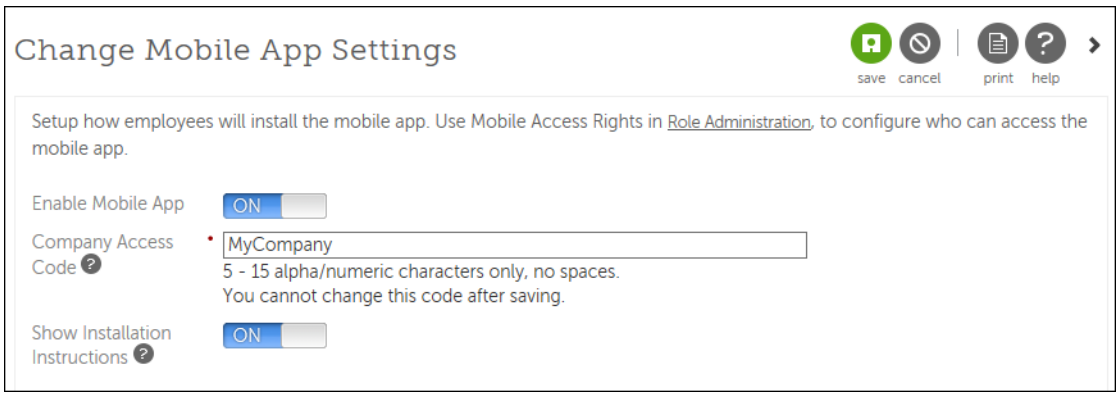
UltiPro Mobile App Access

Enable the UltiPro Mobile App

System administrators can enable the UltiPro Mobile App to allow employees to access UltiPro data from their mobile phones.

Once enabled, the Mobile App Access page displays in role administration. System Administrators can then configure mobile app access rights by role.

NAVIGATION: Menu > System Configuration > System Settings > Mobile App

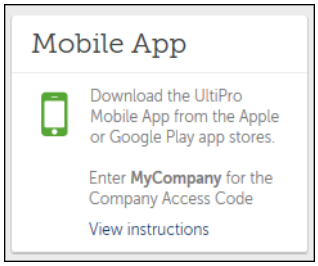


1. From the **Mobile App** page, select **Edit**.
2. At the **Enable Mobile App** field:
   - Move the slider button to ON to enable the UltiPro mobile app.
   - Move the slider button to OFF to disable the UltiPro mobile app.
3. At the **Company Access Code** field, enter a 5-15 character code that employees will use to install the mobile app. This company access code will be unique to your organization. The company access code:
   - Is created by your organization. The company access code is not provided to you by Ultimate Software.
   - Cannot be changed once it is saved. If your company has a test environment, you can enable the mobile app for that environment, but remember to not use the company access code you want to use in production because the code is unique and cannot be changed. For example, if you want the “Acme” company access code for your production environment, then use “AcmeTest” for the test environment.
   - Does not need to be a combination of letters and/or numbers.
   - Is not case-sensitive.

- Should be an easy word for your employees to remember. For example, your company name.

4. At the **Show Installation Instructions** field, move the slider button to ON to display UltiPro Mobile app installation instructions on the UltiPro home page. If enabled, all users will see the Company Access Code and link to installation instructions on the UltiPro home page.

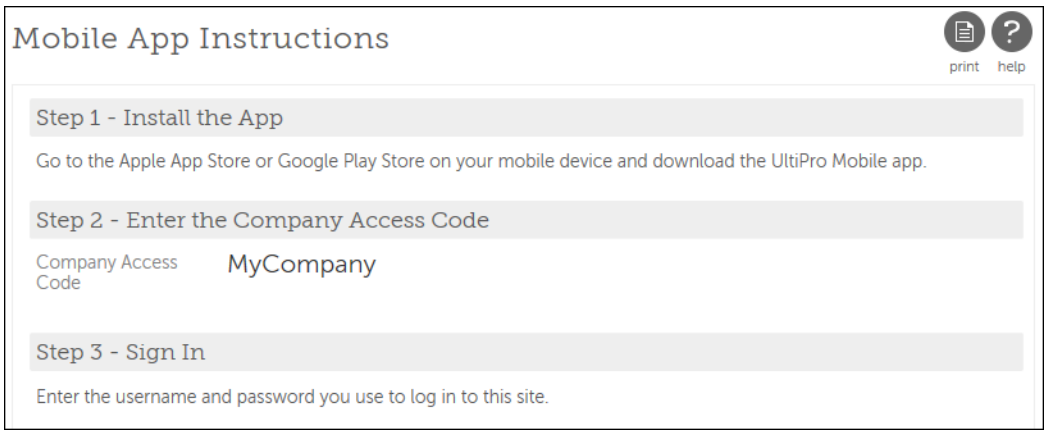
> **Important**
>
> While you are testing your mobile app access rights configuration, at the **Show Installation Instructions** field, move the slider button to **OFF** to ensure that all employees do not view installation instructions and attempt to download the mobile app during testing.



5. Select **Save**.

Customize Mobile App Instructions

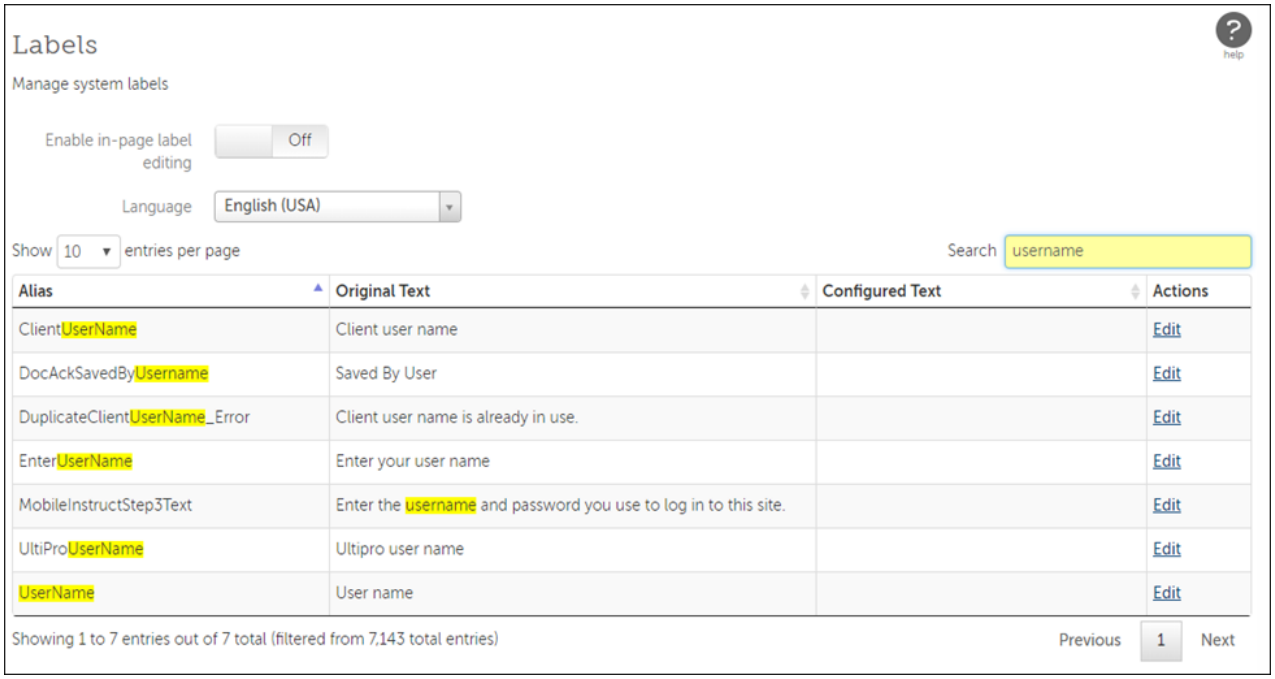
The Mobile App Sign In Instructions that display for your employees can be customized. Employees access the Mobile App Instructions page by selecting the View Instructions link that displays on the UltiPro home page Mobile App gadget.



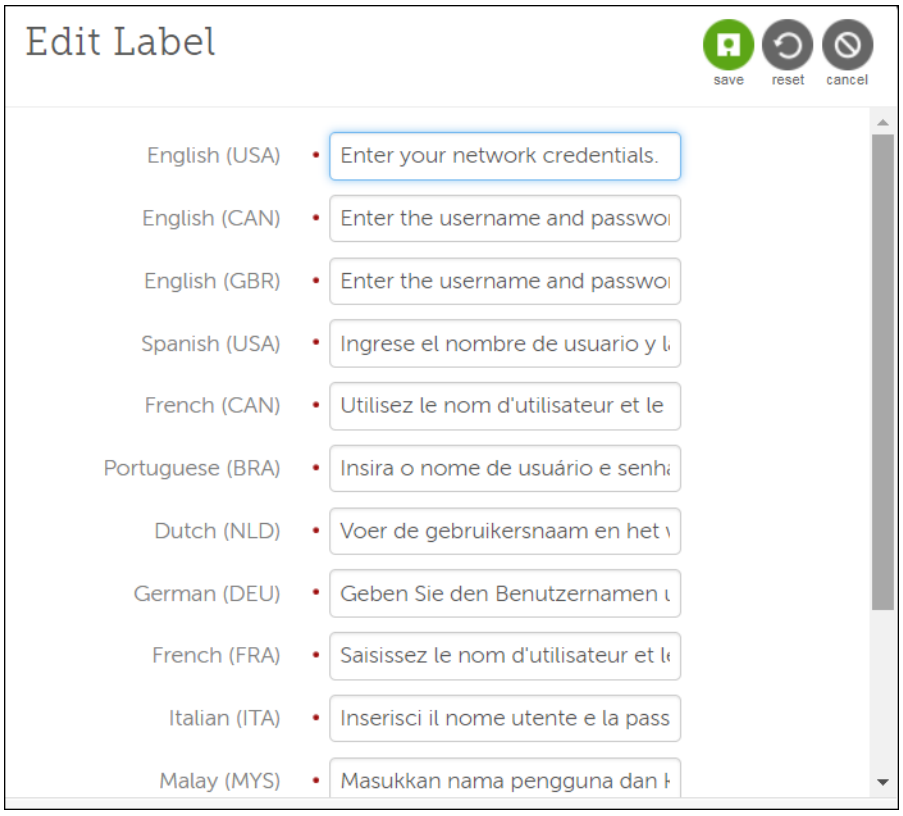
You can customize the Mobile App Sign In instructions (Step 3) that display for your employees using Platform Configuration labels.

NAVIGATION: Menu > System Configuration > Platform Configuration > Labels

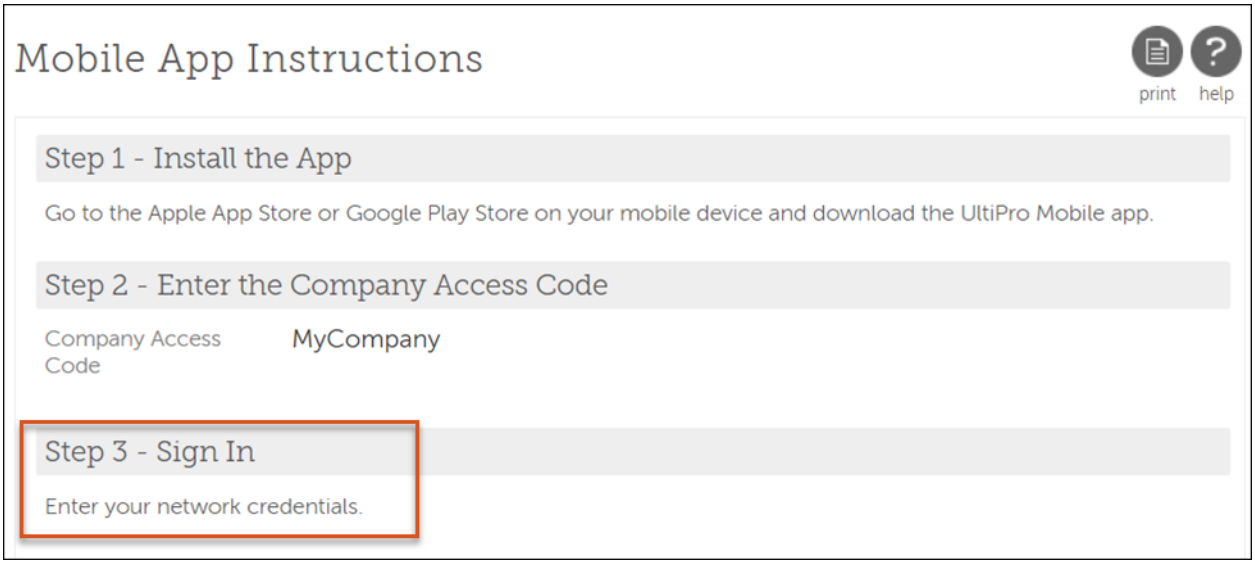
1. From the Labels page, at the Search field, enter the search term: **username**.
2. Press Enter to display the search results.



3. At the **Actions** column, select the **Edit** link that corresponds with the **MobileInstructionsStep3Text** Alias. The **Edit Label** pop-up page displays.



4. Enter the instructions in the fields (up to 1000 characters), as desired.
5. Select **Save**. The updated instructions display on the Mobile App Instructions page that employees can access from the Mobile App gadget that displays on the UltiPro home page.



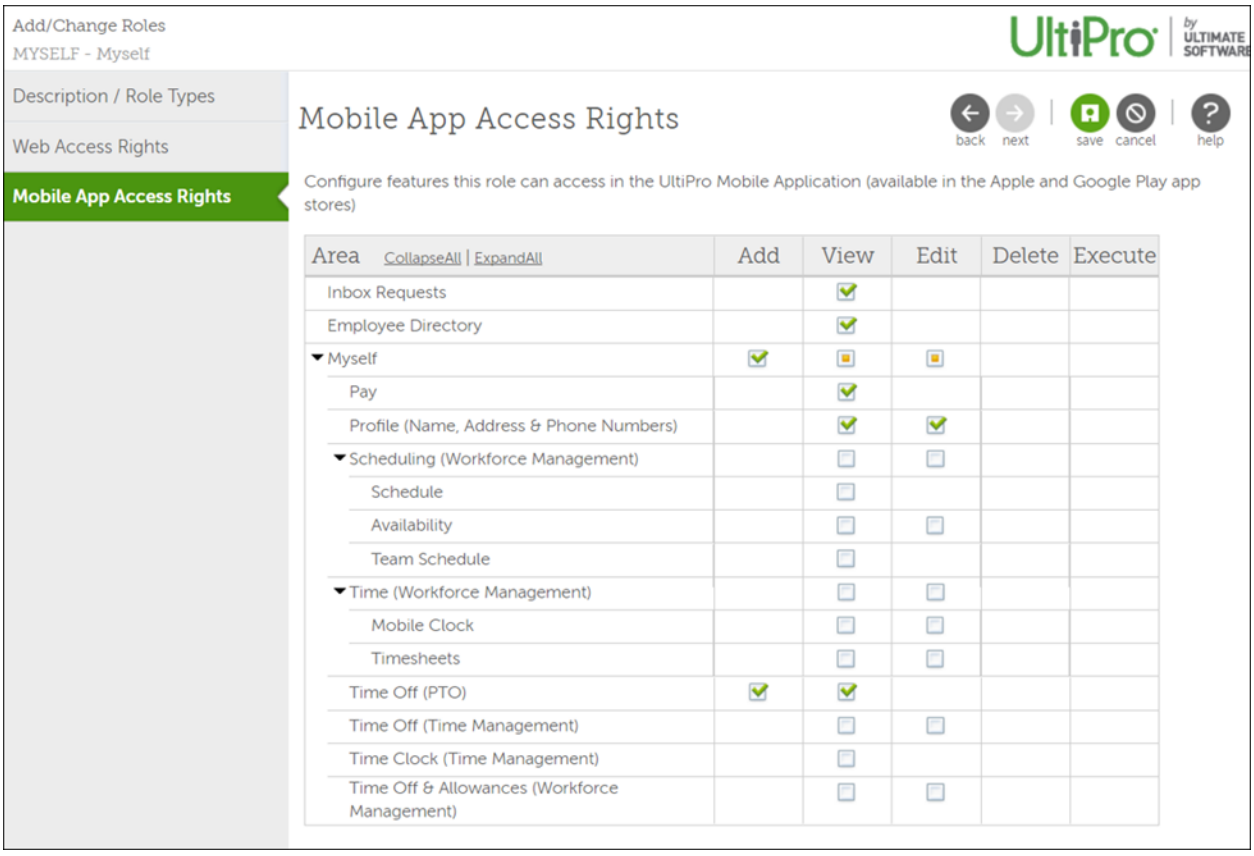
Configure UltiPro Mobile App Access Rights

Configure Mobile App access rights for employees assigned to a selected role on the Mobile App Access Rights page.

Initially, all the UltiPro areas/elements are collapsed and the associated access rights are disabled. Access rights can be assigned to an entire area (and inherited by all elements within the area) or assigned individually to selected elements within an area. When selected elements in an UltiPro area have different access rights than others in the same area, the corresponding rights for the high-level area are shown to be partially enabled.

The available access rights include Add, View, Edit, Delete, and Execute. Assigned access rights for the elements are indicated with icons on the **Mobile Access Rights** page:

- Green check marks indicate rights that are enabled.
- Unchecked boxes indicate rights that are disabled.
- Checkboxes with yellow tick marks indicate rights that are partially enabled.



Important

Mobile App Access Rights work differently than Web Access Rights in that they are aggregated.

- Access to the mobile app: If a user has multiple roles assigned to them and one role has access to the mobile app and another does not, the user will have access to the mobile app.
    - For example, if access to the mobile app is only available for a user's Manager role and not for the Employee role, then managers who have both roles assigned will have access to the mobile app.
- Access within the mobile app: If a user has multiple roles and one role has limited access to features in the mobile app while the other has full access to the mobile app, the user will have full access to the mobile app.
    - For example, if a user is assigned to both the employee and manager roles and View access right is enabled for Pay for the employee role and disabled for the manager role, the user will still be able to view Pay. If the user is only assigned to the manager role, that user would not be able to view Pay in the mobile app

Refer to the UltiPro Mobile App toolkit available in the Learning Center to view the Mobile App Access Rights Configuration QuickTour.

NAVIGATION: Menu > System Configuration > Security > Role Administration

1. From the **Role Administration** page, identify the roles that need access to the UltiPro Mobile app.
2. To edit an existing role, in the **Description** column, select the appropriate role link. The **Description / Role Types** page appears.
3. Select the **Mobile Access Rights** tab. The **Mobile Access Rights** page appears with all elements collapsed.
4. From the **Mobile Access Rights** page, expand the Areas of UltiPro to view the current access rights settings for the associated UltiPro elements.
5. Enable the UltiPro Mobile Application features by checking the applicable Add, View, Edit, Delete, or Execute columns. To enable individual pages, expand each subsection, as needed.
    - Check the **Add** box to enable add rights.
    - Check the **View** box to enable view-only rights.
    - Check the **Edit** box to enable viewing and editing rights.
    - Check the **Delete** box to enable delete rights.
    - Check the **Execute** box to enable execute rights.
    - Uncheck any box to disable the assigned access rights.
6. Select **Save**. The **Role Administration** page appears.
7. Enable UltiPro Mobile App access rights for additional roles, as needed.

Important

Remember to confirm that all mobile app access rights for each role are configured correctly before moving the **Show Installation Instructions** field slider button to **ON** . This ensures that all employees do not view installation instructions and attempt to download the UltiPro mobile app before the configuration has been fully tested.

Refer to the UltiPro Mobile App toolkit available in the Learning Center to view additional learning resources. Navigation: Learning Center Home > Documentation > System Management > Activate.