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UltiPro 2016 Fall Release

Payroll Processing, Tax Compliance, and Time Management

Version: 12.1.2

Presenter: Christopher Pacini
Susan Grier

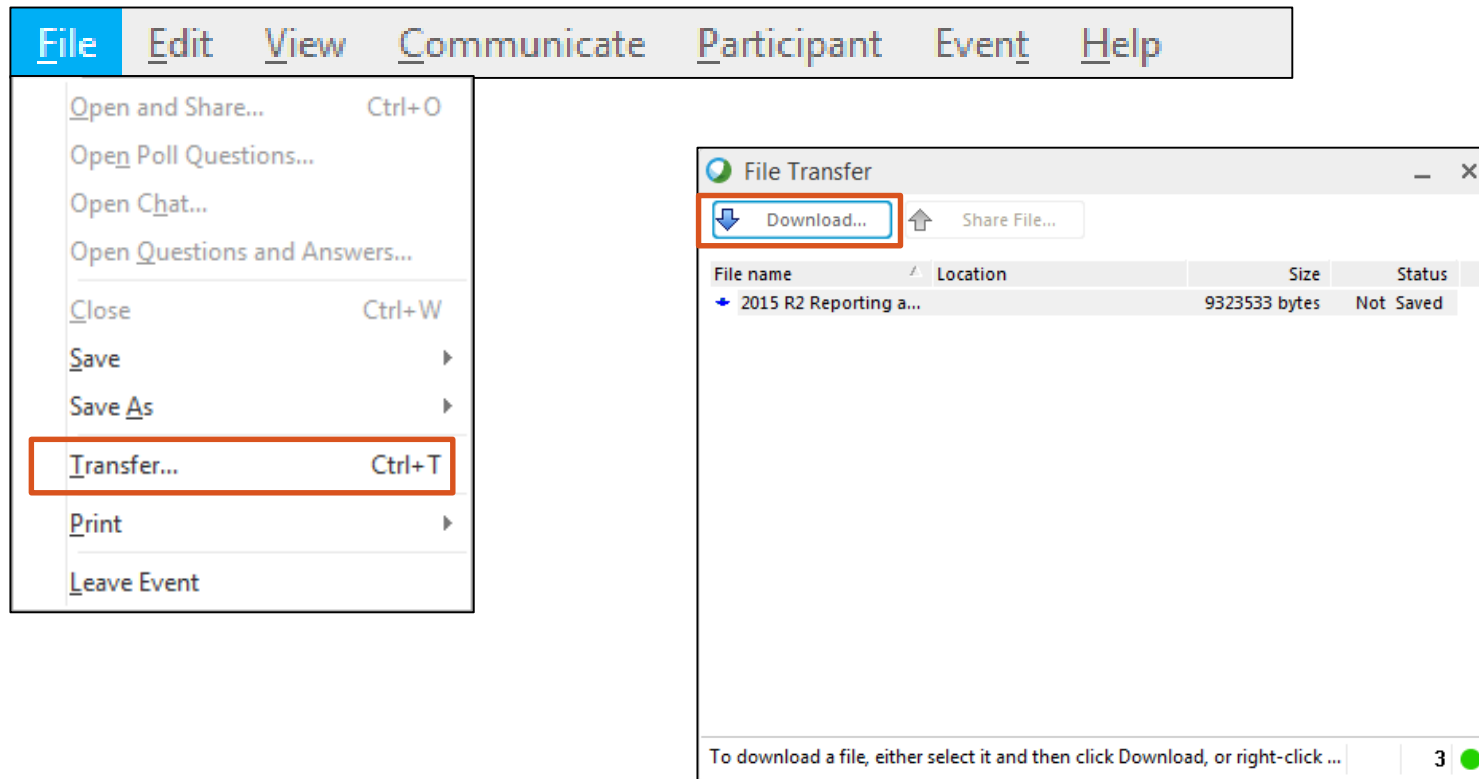
Phone: 877.605.6482

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Commonly-Asked Questions

Question: How do I download the presentation slides file?

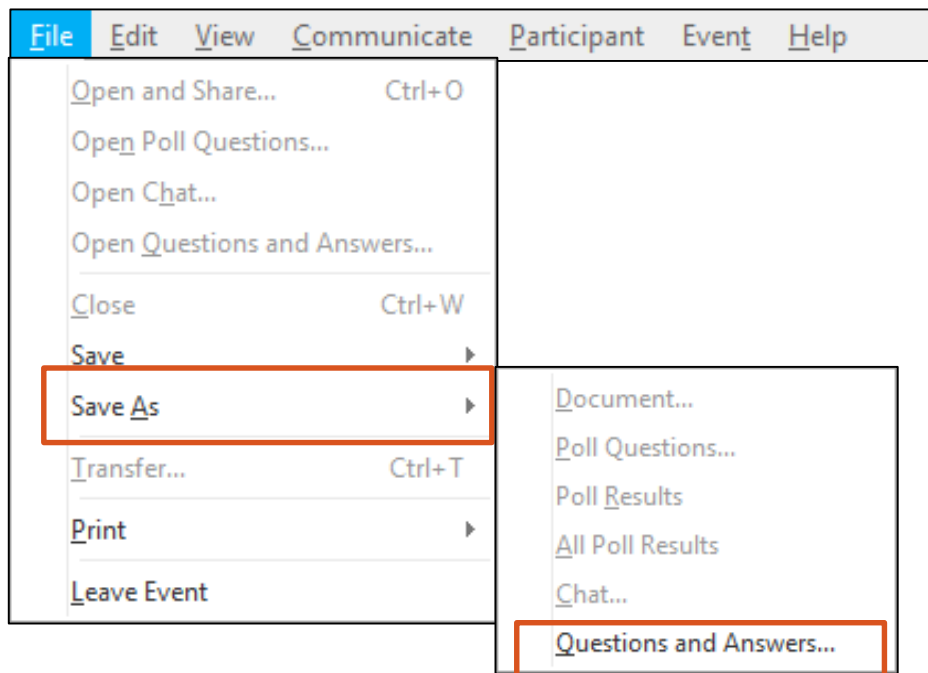
Answer: From your WebEx session, select File > Transfer. From the File Transfer window, select the file and then select Download. Enter the site in which to save the file and select Save.



Commonly-Asked Questions

Question: How do I obtain the questions and answers asked during this session?

Answer: From the WebEx session, select File > Save As > Questions and Answers. Enter the site in which to save the questions and answers and select Save.



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(computer speakers)



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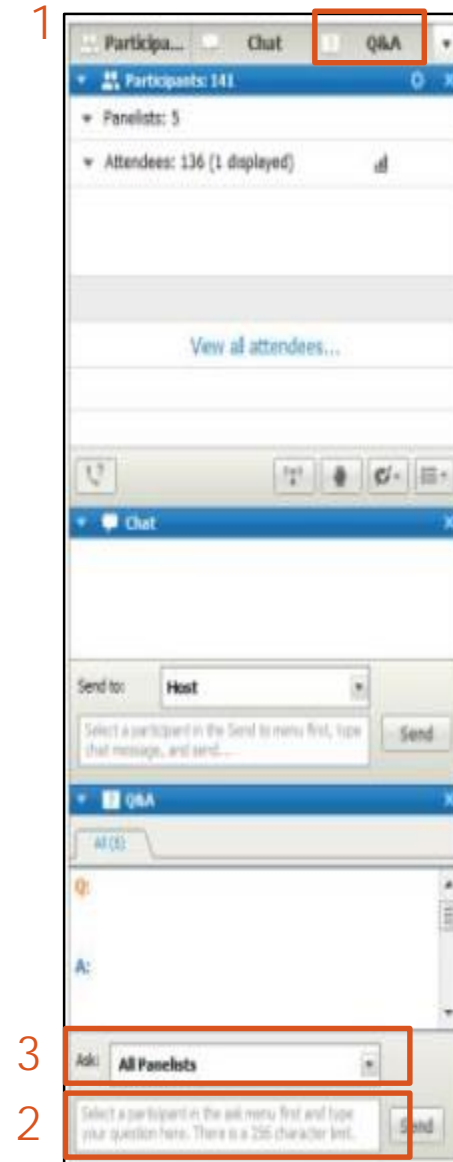


Note: Phone lines have been muted for this call. You have been placed in a “listen only” mode for presentation purposes.

Ask Questions

1. Select Q&A at the top of your screen.
2. Enter your question in the text box next to the Send button.
3. Select All Panelists from the Ask drop-down list, and select Send.

Note: Panelists will attempt to answer all questions during the webcast. Presentation slides and recording will be published.



Agenda

- Payroll Processing
- Tax Compliance
- Time Management

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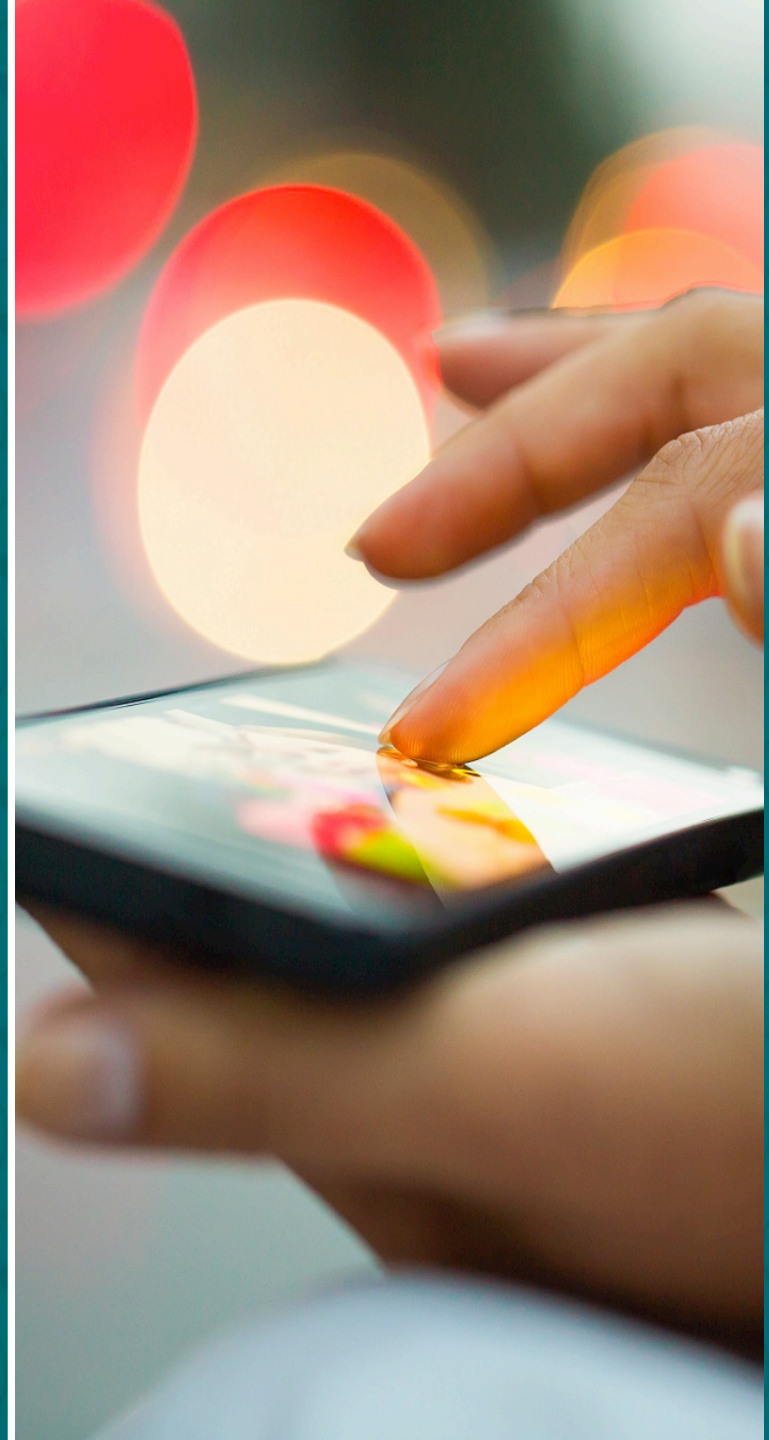
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Payroll Processing



Payroll Processing

- Year-End Gateway
- Reset Pay Groups
- Rest & Recovery Rate Feature
- Pay Statement Enhancements

Year-End Gateway

2016 Year-End Gateway is now available

Menu > Administration > Year End > Year End Gateway

MENU Administration Year End **UltiPro** by **ULTIMATE SOFTWARE** Jeri Abella | Company | To Do | Share Ideas | Help | Logout

Year End Gateway Find...

Year End Gateway

2016 Year End Gateway

save reset cancel print help

Welcome to the Year End Gateway, where you can view and manage the tasks needed to process and finalize year end reporting. The checklist includes recommended and required tasks for completing year end reporting and preparing for processing payrolls in the new year. Use the checklist to go to the area where you can complete each task.

Checklist

● = Required Actions

▶ Verify and update company information	Next Due: 11/22/2016
▶ Verify and update employee information	Next Due: 11/29/2016
▶ Process adjustments	Next Due: 12/13/2016
▶ Review year-end reporting information and approve W-2 printing	Next Due: 12/13/2016
▶ Prepare for next year	Next Due: 11/22/2016

and Tips

- [Using the Year-End Gateway Tour](#)
- [Updating Tax Information Tour](#)
- [Using Form W-2 Box 14 Labels Tour](#)
- [Adding an Off-Cycle Payroll Tour](#)
- [Managing Prior Quarter Adjustments Tour](#)
- [Approving Forms W-2 Printing Tour](#)
- [Entering and Deleting Holidays Tour](#)
- [Extending the Pay Calendar Tour](#)
- [Viewing the Pay Calendar Tour](#)
- [Updating a Deduction Goal Amount Tour](#)

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Year-End Gateway

- Complete your year-end tasks
 - Tasks preceded by red dots are required actions
 - Links are provided to complete tasks directly in UltiPro
- Approve your Forms W-2 printing by *January 13, 2017*
 - Forms W-2 are delivered to shipping address entered

2016 Year End Gateway

save reset cancel | print help

▼ Review year-end reporting information and approve W-2 printing		Next Due: 12/13/2016
● <input type="checkbox"/>	Run the W-2 Negative Wage standard report to verify there are no employees with negative wage amounts. If you have any questions or need assistance regarding negative wage amounts, submit a case via the Customer Success Portal.	Due: 12/13/2016
● <input type="checkbox"/>	Review the Deduction Plans business rule to verify that all appropriate healthcare benefit deductions are set up correctly to be reported on this year's Form W-2. Also review the W-2 Healthcare Reporting Employee Audit Business Intelligence report to verify employee and employer healthcare year-to-date amounts.	Due: 12/13/2016
<input type="checkbox"/>	Review the W-2 Detail and W-2 Summary reports to verify all employee reporting information is correct.	Due: 01/03/2017
● <input type="checkbox"/>	Approve Forms W-2 printing by Ultimate Software. Your Forms W-2 will be printed and delivered to your shipping address.	Due: 01/13/2017

Feature Benefits

- Provides a timeline for closing your year
- Provides all year-end tasks in one place
- Provides valuable links to completing tasks

Reset Pay Groups

Reset your pay groups

Menu > Administration > Payroll Admin > Payroll Utilities > Pay Group Reset

MENU Administration Payroll Admin **UltiPro** by ULTIMATE SOFTWARE Jeri Abella Company To Do Share Ideas Help Logout

Business Rules Deduction Goal Update Payroll Setup Payroll Settings Payroll Utilities Time Entry Setup Find...

Pay Group Reset

Pay Group Reset

Reset pay groups to the selected month. Select the month to reset. Select the pay groups and select Reset. The monthly and quarterly (if applicable) reset dates update to the selected month and associated quarter.

Role: Payroll Manager

Month to Reset: July

Find by: Pay group starts with [] Search

Filtered by: Pay group - starts with [Clear Filters] Displaying all records


Actions: Reset

<input type="checkbox"/>	Pay Group ^	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages
<input type="checkbox"/>	Corp Exec BiWkly	COEXBI	07/21/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.
<input type="checkbox"/>	Corp Hourly Wkly	COHRWK	07/14/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.
<input type="checkbox"/>	Corp Salary Wkly	COSLWK	07/07/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.

Things I Can Do

FOR THIS PAGE

[Tax Group Information](#)



Reset Pay Groups

- Each payroll automatically resets the monthly, quarterly, and yearly dates
- If pay group is no longer used, pay group may need to be reset manually
 - If pay group needs to be reset, a message appears

The screenshot displays the 'Payroll Overview' page. At the top right, there are navigation icons for 'back', 'print', and 'help'. A light blue information banner contains a message: 'Before this pay group can be started, all other pay groups in the tax group must be reset to less than two months prior to this pay period. Reset pay groups from Pay Group Reset (Payroll Admin > Payroll Utilities > Pay Group Reset)'. Below this, the 'Electronics BiWkly Chks' section shows payroll parameters: Pay Period Start (08/23/2016), Pay Period End (09/05/2016), Pay Date (09/01/2016), Pay Frequency (Biweekly), Pay Type (Reg), and Payroll Model (Base). The 'Process Payroll' section features a table with columns for Process, Steps, Status, Last Update, and Initiated By. A 'Start payroll' button is visible in the Process column, and a tooltip for the 'Open and start payroll for this period' step is shown.

Process	Steps	Status	Last Update	Initiated By
<input type="button" value="Start payroll"/>	<div style="border: 1px solid gray; padding: 2px;">Open and start payroll for this period</div>			



Reset Pay Groups

- Reset a pay group manually when:
 - Pay group has not been processed in two months
 - Employees were paid with this pay group during the current year
 - Pay group is active with scheduled payrolls

Pay Group Reset

Reset pay groups to the selected month. Select the month to reset. Select the pay groups and select Reset. The monthly and quarterly (if applicable) reset dates update to the selected month and associated quarter.

Role
Payroll Manager

Month to Reset July

Find by Pay group starts with Search
Filtered by Pay group - starts with [\[Clear Filters\]](#) Displaying all records

Actions [Reset](#)

<input type="checkbox"/>	Pay Group ^	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages
<input type="checkbox"/>	Corp Exec BiWkly	COEXBI	07/21/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.
<input type="checkbox"/>	Corp Hourly Wkly	COHRWK	07/14/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.
<input type="checkbox"/>	Corp Salary Wkly	COSLWK	07/07/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.



Reset Pay Groups

Reset a Pay Group

Menu > Administration > Payroll Admin > Payroll Utilities > Pay Group Reset

1. From the Pay group Reset page, select the month from the Month to Reset drop-down list.
2. Select each pay group needed.

Pay Group Reset

Reset pay groups to the selected month. Select the month to reset. Select the pay groups and select Reset. The monthly and quarterly (if applicable) reset dates update to the selected month and associated quarter.

Role
Payroll Manager

Month to Reset July

Find by Pay group starts with Search
Filtered by Pay group - starts with [Clear Filters] Displaying all records

Actions Reset

<input type="checkbox"/>	Pay Group	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages
<input checked="" type="checkbox"/>	Corp Salary Wkly	COSLWK	08/11/2016	Regular	06/2016	Closed	
<input checked="" type="checkbox"/>	Electronics BiWkly DDAs	EBWKL	09/08/2016	Regular	06/2016	Closed	
<input type="checkbox"/>	Park Exec BiWkly	EXEC	07/21/2016	Regular	06/2016	Closed	TG1 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.



Reset Pay Groups

3. Select Reset. A message appears.
4. Select Reset. An informational message appears, notifying you of how many pay groups were reset successfully.

The screenshot displays the 'Pay Group Reset' interface. At the top, there are icons for print, help, and a back arrow. Below this, a message states: 'Reset pay groups to the selected month. Select the month to reset. Select the pay groups and select Reset. The monthly and quarterly (if applicable) reset dates update to the selected month and associated quarter.'

The interface includes a 'Role' dropdown set to 'Payroll Manager' and a 'Month to Reset' dropdown set to 'July'. A search bar is present with 'Find by' set to 'Pay group' and 'starts with' followed by a text input field and search buttons. Below the search bar, it says 'Filtered by Pay group - starts with [Clear Filters]'.

An 'Actions' bar contains a 'Reset' button with a plus icon, which is highlighted with a red box. Below this is a table of pay groups:

<input type="checkbox"/>	Pay Group	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages ^
<input checked="" type="checkbox"/>	Corp Salary Wkly	COSLWK	08/11/2016	Regular	06/2016	Closed	
<input checked="" type="checkbox"/>	Electronics BiWkly DDAs	EBWKL	09/08/2016	Regular	06/2016	Closed	
<input type="checkbox"/>	Park Exec BiWkly	EXEC	07/21/2016	Regular	06/2016	Closed	TG1 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.

Overlaid on the right side of the screenshot is a 'Reset Pay Groups' dialog box. It contains the question 'Are you sure you want to reset the selected pay groups?' and two buttons: 'Cancel' and 'Reset'.



Reset Pay Groups

Review pay groups and tax groups from the Tax Group Information page

Menu > Administration > Payroll Admin > Payroll Utilities > Pay Group Reset > Things I Can Do > Tax Group Information

MENU Administration Payroll Admin

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Business Rules Deduction Goal Update Payroll Setup Payroll Settings Payroll Utilities Time Entry Setup Find...

Pay Group Reset

Tax Group Information

Review all pay group reset dates and pay dates according to the associated company and tax group.

Find by Pay group starts with Search

Filtered by Pay group - starts with [Clear Filters](#) Displaying all records

Actions OK

Pay Group ^	Pay Group Code	Company	Company Name	Tax Group	Tax Group Code	Last Month Reset	Last Quarter Reset	Last Year Reset	Pay Date	Country	▼
Corp Exec BiWkly	COEXBI	CORP	UEL Corporate	TG4 CORP	TG4	06/30/2016	06/30/2016	12/31/2015	07/21/2016	United States	
Corp Hourly Wkly	COHRWK	CORP	UEL Corporate	TG4 CORP	TG4	06/30/2016	06/30/2016	12/31/2015	07/14/2016	United States	
Corp Salary Wkly	COSLWK	CORP	UEL Corporate	TG4 CORP	TG4	06/30/2016	06/30/2016	12/31/2015	07/07/2016	United States	
Electronics BiWkly Chks	EBWKC	AWE	Another World Electronics	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/21/2016	United States	
Electronics BiWkly DDAs	EBWKL	AWE	Another World Electronics	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/28/2016	United States	
Maxines Hourly Wkly	MHRWK	MSG	Maxines Restaurant	TG2 MSG Bad	TG2	01/31/2009	12/31/2008	12/31/2008		United States	
Park Exec BiWkly	EXEC	TMAP	To the Max Amusement Park	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/21/2016	United States	
Park Hourly Wkly	PHRWK	TMAP	To the Max Amusement Park	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/14/2016	United States	
Park Salary Wkly	PSALWK	TMAP	To the Max Amusement Park	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/07/2016	United States	
Park Tip Wkly	PTIPWK	TMAP	To the Max Amusement Park	TG1 TMAP AWE	TG1	06/30/2016	06/30/2016	12/31/2015	07/14/2016	United States	
Park Union Wkly	PUWKLY	TMAP	To the Max Amusement Park	TG1 TMAP AWE	TG1	01/31/2009	12/31/2008	12/31/2008		United States	

1 / 1 Records per page

back print help

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Reset Pay Groups

- If the pay group is not available to reset, review the message column
 - Messages alerts you to resolve issues ahead of time
 - Messages indicate the tax group to which the pay group is assigned

<input type="checkbox"/>	Pay Group ▲	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages	▼
<input type="checkbox"/>	Corp Hourly Wkly	COHRWK	07/14/2016	Regular	06/2016	Closed	TG4 All payrolls for the selected month must be processed and closed or the status of the pay period set to inactive.	

<input type="checkbox"/>	Pay Group ▲	Pay Group Code	Pay Date	Pay Type	Last Month Reset	Payroll Status	Messages	▼
<input type="checkbox"/>	Corp Exec BiWkly	COEXBI	08/18/2016	Regular	07/2016	Closed	TG4 All pay groups for the tax groups listed must be reset for the prior month.	

Note: In some circumstances, you may need to inactivate unused payrolls for the pay group you are resetting.



Feature Benefits

- Enables you to maintain dates of unused payrolls
- Enables you to resolve out-of-date pay groups quickly without delaying your payroll schedule
 - No need to submit a Customer Success case to resolve received messages



Rest & Recovery Rate Feature

- California AB 1513 legislation was passed
 - Requires employees to be compensated for rest and recovery periods
 - Relates to employees compensated on a piece-rate basis
- UltiPro provides Rest & Recovery feature
- Rest & Recovery feature calculates the higher of:
 - Federal minimum wage
 - State minimum wage
 - Local minimum wage, if configured
 - Average calculated value

Rest & Recovery Rate Feature

- Modify your existing earnings to be included in Rest & Recovery calculation
 - Select Rest & Recovery Wages
 - Select Rest & Recovery Hours

Earnings Setup
PIECE - Piece Work Earn

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Main
Tax
Detail
Summary

Detail

Scheduled Pay Periods by Default

Per Pay Check Maximum

Amount: \$0.0000
Hours: 0.0000

Include Earning In

Retroactive pay Shift differential Hours paid for HCSO
 Deferred compensation dollars Deferred compensation hours Health Care Eligibility Hours
 FLSA average pay rate dollars FLSA average pay rate hours Wages Paid Last 90 Days
 Hours accumulation Earnings accumulation Hours Paid Last 90 Days
 Productive time Exclude in total hours Total Hours Worked
 Pension accumulation Allocations Rest & Recovery Wages
 Total benefit hours/earnings Hours worked for HCSO Rest & Recovery Hours

Coefficient Overtime Lookback

Use Coefficient OT Lookback

Retroactive Pay Earning

Payout Earning For Retroactive Pay

Rest & Recovery Rate Feature

- Add new earnings to pay out Rest & Recovery time
 - In Pay Rate for Payout section, select Piece Rate Rest & Recovery

The screenshot shows the 'Earnings Setup' screen for 'Mrs. Jeri Edwards Abella - 400100018 - UEL Corporate'. The interface includes a navigation menu on the left with 'Main', 'Tax', 'Detail', and 'Summary' options. The main content area is titled 'Main' and contains several sections: 'Regular Pay Code' and 'Overtime' checkboxes; 'Rules' section with 'Calculation' (set to 'Pay rate * hours * rate factor') and 'Rate Factor' (set to '1.0000'); 'Pay Entry Options' with 'Display in pay data entry' and 'Include in manual check' checkboxes; and 'Pay Statement Options' with 'Calculate pay rate if hours exist' and 'Append salary or hourly to stub description' checkboxes. At the bottom, the 'Pay Rate For Payout' section has a 'Use pay rate' dropdown menu that is open, displaying the following options: 'Piece Rate Rest & Recovery' (selected), 'Not Applicable', 'Calculated 90 Day Average', 'Higher of Average or Current Rate', and 'Piece Rate Rest & Recovery'. The 'UltiPro by ULTIMATE SOFTWARE' logo is in the top right corner, and a toolbar with icons for back, next, save, reset, cancel, print, and help is located below the logo.

Rest & Recovery Rate Feature

- Rest & Recovery rate example for California employee
 - Federal minimum wage: \$7.25
 - State minimum wage: \$10.00
 - Local minimum wage: \$12.55**
 - Average calculated value: \$10.00

View/Change Employee Pay Check

Employee status: Active Distribution: Direct Deposit Pay number: 1 of 1
Payroll Date: 07/07/2016 Print status: Not printed Pay type: Regular pay
Pay date: 07/07/2016
Tax frequency: Weekly

More employee information

Earnings

Earning	Hours	Amount	Pay rate	Job	Piece count
Piece Work Earn	38.0000	200.00	10.0000	Dishwasher (DW)	20.000000
R&R Payout	2.0000	25.10	12.5500	Dishwasher (DW)	0.000000

Displaying 1-2 of 2 records Records per page: 20

Deductions

Tax	Amount
Federal Income Tax	18.36
Employee Medicare	3.26
Social Security Empl	13.96
CA State Income Tax	0.00
CA Disability Empl	2.03

Displaying 1-5 of 5 records Records per page: 20

Totals

Description	Amount
Hours	40.0000
Earnings	225.10
Deductions	0.00
Taxes	37.61
Check	0.00
Direct Deposit	187.49
Net pay	187.49

Total: \$187.49

Rest & Recovery Rate Feature

- Assign local minimum wage to your locations
 - Select the jurisdiction from the Local Minimum Wage Jurisdiction

Add/Change Location

save reset cancel print help

Quick Tours and Tips

System Administration Resources
[Patient Protection and Affordable Care Act \(PPACA\) Resources](#)
[Life Events – Resources for System Administrators](#)
[Open Enrollment – Resources for System Administrators](#)
[Add a Simple Business Rule Tour](#)
[Add a Location Tour](#)
[Scheduling Earnings and Deductions Tour](#)
[General Ledger Configuration Tour](#)
[Updating Tax Information Tour](#)
[Adding a Distribution Center Tour](#)
[Using Form W-2 Box 14 Labels Tour](#)
[Effective Dating Business Rules for Open Enrollment Tour](#)
[Deduction/Benefit Plans Overview](#)
[Adding a Medical Deduction Tour](#)
[Adding a 401\(k\) Deduction Tour](#)
[Adding a Group Term Life Deduction Tour](#)
[Add a Supplemental Life Deduction Tour](#)
[Add a Wage Attachment Deduction Tour](#)
[Deduction Garnishment Stacking Tour](#)
[Coefficient Overtime Overview](#)
[Adding a High-Deductible Health Plan Tour](#)

Companies using this tax location

Find by Find

Available

Another World Electronics
Maxines Restaurant
To the Max Amusement Park

Selected

UJEL Corporate

Local Minimum Wage Jurisdiction

Jurisdiction

California/Oakland

California/Berkeley
California/Emeryville
California/Los Angeles
California/Los Angeles County
California/Mountain view
California/Oakland
California/Pasadena
California/Richmond
California/Sacramento
California/San Diego
California/San Francisco
California/San Jose
California/San Mateo
California/Santa Monica
California/Sunnyvale
Illinois/Chicago
Iowa/Johnson County
Kentucky/Lexington
Kentucky/Louisville

Reporting Information

Worksite reporting id 175

SUI unit code 75

Comments

Primary

Secondary

Feature Benefits

- Calculates the average pay rate automatically
- Compares minimum wage limits and automatically uses the highest pay rate

Pay Statement Enhancements

- Pay statement language
- Earnings print sequence
- Shift and overtime display options
 - Detailed Shifts
 - Detailed Shifts and Overtime Rate of Pay
- Total Hours Worked

Pay Statement Language

Define Your Pay Statement Language

Menu > Myself > Personal > Private Info

1. From the Private Info page, select Edit.
2. Select the Preferred Language for Online Pay Statement.
3. Select Save.

The screenshot displays the 'Change Private Information' form. The 'Preferred Language for Online Pay Statement' field is highlighted with a red box, and its dropdown menu is open, showing various language options. The 'Preferred Language for Printed Pay Statement' is currently set to 'English'. The form also includes sections for 'Visa' and 'Work Permit' information. On the right side, there are two panels: 'Things I Can Do' with links like 'Change Name, Address, or Telephone' and 'Add Alternate Phone Number', and 'Quick Tours and Tips' with links like 'UltiPro Navigation Overview' and 'Personal Section Overview'. At the top right, there are icons for 'save', 'cancel', 'print', and 'help'.

Field	Value
Preferred Language for Printed Pay Statement	English
Preferred Language for Online Pay Statement	French (CAN)
Visa	
Visa Type	
Visa Expiration	
Work Permit	
Country	
Reference ID	

Pay Statement Language

- Languages are populated from your Display Settings
 - Menu > System Configuration > System Settings > Display
 - Languages are selected from the Selected Languages section

The screenshot displays the 'Display Settings' configuration page. At the top right, there are icons for 'edit', 'print', 'help', and a back arrow. The page is divided into several sections:

- Supervisor Finder:** Includes radio buttons for 'Choose from within the same component company' and 'Choose from all component companies'.
- Future Date:** Features a toggle switch for 'Use future dating' which is currently set to 'ON'.
- Content Management:** Includes a toggle switch for 'Allow users to modify gadget placement' which is currently set to 'OFF'.
- Home Page:** Includes radio buttons for 'Show both the Classic and Smart Dashboard' (selected), 'Show the Smart Dashboard only', and 'Show the Classic Dashboard only'.
- Selected Languages:** This section is highlighted with a red border. It contains the instruction 'Select the languages that should be shown in the UI in addition to US English.' and a list of language buttons: Danish (DNK), Dutch (NLD), English (CAN), English (GBR), Filipino (PHL), French (CAN), French (FRA), German (DEU), Italian (ITA), Portuguese (BRA), and Spanish (USA).
- Workflow Pending Data Report:** Features a toggle switch for 'Record pending changes for employee' which is currently set to 'ON'.

Pay Statement Language

- Language option is available on the Pay Statement
 - Menu > Myself > Pay > Current Pay Statement
 - Switch between preferred language and default English (USA)

Pay Statement

download print help

This is a statement of earnings and deductions. This pay statement is non-negotiable.

Display Pay Statement in **English (USA)**

UltiPro by ULTIMATE SOFTWARE
DBA: UltiPro Master Company
2000 Ultimate Way
Weston, FL 33326
954-230-1921 Ext 4567

Relevé De Paie
Date De Début De Période 07/02/2016
Date De Fin De Période 07/08/2016
Date De Paie 07/07/2016
Document 121997
Paie Nette \$1,236.22

Détails De Paie

Jeri Edwards Abella 3766 S Van Ness Ave Los Angeles, CA 90018 USA	Matricule D'employé 400100018 NSS 441-78-2170 Emploi System Administrator Taux Salarial \$48.08 Fréquence De Paie Toutes les semaines	Groupe De Paie Corp Salary Wkly Lieu De Travail Los Angeles [Fr] Region WES - Western Region [Fr] Division CORP - Corporate [Fr] Establishmnt NONE - No Establishment [Fr] Department SYSM - Systems Management	Impôt Fédéral M 0 CA State Income Tax (Residence) S 0 CA State Income Tax (Work) S 0
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Gains **Retenues**

Earnings Print Sequence

- Earnings Print Sequence is available for pay statements
 - Available for printed and online pay statements
- Earnings are arranged according to priority
 - Enter a value 1–9999

Earnings Print Sequence

Define the Print Sequence from Earnings Setup work event

Menu > System Configuration > Business Rule > Earnings

Earnings Setup
HRLY - Hourly Pay

UltiPro[®] by ULTIMATE SOFTWARE

Main

Tax

Detail

Summary

Country USA

Code HRLY

Description • Hourly Pay

General Information

Stub Description • Hourly Pay

Active

As Of • 01/01/1999

Reporting Category Wages and Salaries

Time Clock Code HRLY

Display Sequence 1

Print Sequence 1

Regular Pay Code

Overtime

back next save reset cancel print help

Earnings Print Sequence

- Manage display from Earnings Configuration page
 - Menu > Administration > Payroll Admin > Pay Statement Options > Earnings Configuration
 - Update Description and Stub Description easily
 - Update Display Sequence for pay data entry
 - Update Print Sequence for employee's pay statements
- Sort columns to order earnings according to sequence

Earnings Configuration

save cancel | print help

Find by Earning code starts with Search

Export to Excel (*.xls) Export to CSV (*.csv)

Code	Country	Active	Description	Stub Description	Display Sequence	Print Sequence
HRLY	USA	Y	Hourly Pay	Hourly Pay	9999	1
REG	USA	Y	Regular Pay	Regular Pay	9999	1
SAL	USA	Y	Salary Pay	Salary Pay	9999	1
BONUS	USA	Y	Bonus Payment	Bonus	9999	2
OT	USA	Y	Overtime	Overtime	9999	2
COM	USA	Y	Commission	Commission	9999	3
COEF	USA	Y	Coeficient OT	Coeficient OT	9999	4
1099M	USA	Y	1099 Misc Waaes	1099 Misc Waaes	9999	9999

Shift and Overtime Print Options

- New pay statement display options are available
- Pay statement display options present shifts and overtime earnings in an easy-to-read format
- Three options available:
 - Check Format Options*
 - Detail Shifts
 - Detail Shifts and Overtime Rate of Pay

***Note:** The Check Format Options is a default option to preserve current functionality.

Shift and Overtime Print Options

- Assign Shift/OT Settings from the Pay Group Options page
Menu > Administration > Payroll Admin > Pay Statement Options
- Assign Shift/OT Settings according to pay group and check type
 - Payroll check type includes Regular and Additional checks
 - Instant check type only includes Instant checks

Pay Group Options

save cancel print help

Find by Code starts with Search

Code	Description	Country	Pay Group Status	Check Type	Check Format	Shift/OT Settings
COEXBI	Corp Exec BiWkly	United States	Active	Payroll	CA OT Top check	Detailed Shifts Check Format Options Detailed Shifts Detailed Shifts & OT Rate of Pay
COEXBI	Corp Exec BiWkly	United States	Active	Instant	CA OT InfoSeal/Pressure Seal check	Check Format Options
COHRWK	Corp Hourly Wkly	United States	Active	Instant	CA OT InfoSeal/Pressure Seal check	Check Format Options
COHRWK	Corp Hourly Wkly	United States	Active	Payroll	CA OT Top check	Check Format Options
COSLWK	Corp Salary Wkly	United States	Active	Payroll	CA OT Top check	Detailed Shifts
COSLWK	Corp Salary Wkly	United States	Active	Instant	CA OT InfoSeal/Pressure Seal check	Detailed Shifts & OT Rate of Pay
EBWKC	Electronics BiWkly Chks	United States	Active	Instant	CA OT InfoSeal/Pressure Seal check	Check Format Options
EBWKC	Electronics BiWkly Chks	United States	Active	Payroll	CA OT Top check	Check Format Options
FRWKI	Electronics BiWkly DDAs	United States	Active	Instant	CA OT InfoSeal/Pressure Seal check	Check Format Options

Shift and Overtime Print Options

- Detail Shifts

- Organizes each shift under the earnings
- Provides pay rate, hours, and current amount for each shift
- Provides year-to-date (YTD) column for each earnings

View/Change Employee Pay Check

Employee status: Active Print status: Not printed Pay number: 3 of 3
 Payroll Date: 07/28/2016 Post only Pay type: Instant Check
 Pay date: 07/28/2016 Check number: Gross Up
 Tax frequency: Weekly Bank: New World Bank

More employee information

Earnings								
+ Add - Delete Column(s)								
<input type="checkbox"/>	Earning	Hours	Amount	Pay rate	Job	Shift	Shift amt	Shift rate
<input type="checkbox"/>	Holiday Pay	8.0000	120.00	15.0000	Wait Staff (WAIT)	None (Z)	0.00	0.0000
<input type="checkbox"/>	Hourly Pay	10.0000	156.00	15.0000	Wait Staff (WAIT)	Night Shift (O3)	6.00	0.6000
<input type="checkbox"/>	Hourly Pay	10.0000	150.00	15.0000	Wait Staff (WAIT)	Morning Shift (O1)	0.00	0.0000
<input type="checkbox"/>	Hourly Pay	10.0000	152.50	15.0000	Wait Staff (WAIT)	Afternoon Shift (O2)	2.50	0.2500

1 of 1 Displaying 1-4 of 4 records Records per page: 20

Total: \$393.58

Sophia Amore
 21 Hawthorne Blvd
 Palos Verdes, CA 90723

SSN XXX-XX-7412

E

EARNINGS								
Pay Type	Piece Units	Piece Rate	Period Start	Period End	Hours	Pay Rate	Current	YTD
Hourly Pay								42,325.45
Afternoon Shift					10.00	15.2500	152.50	
Morning Shift					10.00	15.0000	150.00	
Night Shift					10.00	15.6000	156.00	
Holiday Pay					8.00	15.0000	120.00	1,800.00
Total Hours					38.00			

Shift and Overtime Print Options

- Detail Shifts and OT Rate of Pay
 - Organizes each shift under the earnings
 - Organizes each overtime according to the shift

Sophia Amore		Paygroup	PHRWK	FIT	W 0	15.00	Check No	25009
21 Hawthorne Blvd		Location	BURBNK	SIT res	M 0		Check Date	8/4/2016
Palos Verdes, CA 90723		Region	SW	SIT work	M 0		Period Start	7/23/2016
		Division	ENT				Period End	7/29/2016
SSN	XXX-XX-7412	Emp No	000010022	Establishmnt	NONE		Job	WAIT
				Department	WAIT		Pay Rate	15.0000
COMPANY MESSAGE								
EARNINGS								
Pay Type	Piece Units	Piece Rate	Period Start	Period End	Hours	Pay Rate	Current	YTD
Hourly Pay								43,682.69
Afternoon Shift					10.00	15.2500	152.50	
Morning Shift					10.00	15.0000	150.00	
Night Shift					10.00	15.6000	156.00	
Serv Night					10.00	15.7496	157.50	
Coefficient OT								187.27
Night Shift					2.50	22.6680	56.67	
Serv Night					1.50	22.8133	34.22	
					Total Hours	44.00		

Shift and Overtime Print Options

- Assign the shift used for each earnings in paydata entry
 - Coefficient overtime earnings is assigned with the corresponding shift
 - Shift differential does not need to be flagged to assign the coefficient overtime to the corresponding shift

View/Change Employee Pay Check

Employee status: Active Print status: Not printed Pay number: 1 of 1
Payroll Date: 07/28/2016 Post only Pay type: Instant Check
Pay date: 07/28/2016 Check number: Gross Up
Tax frequency: Weekly Bank: New World Bank

More employee information

Earnings

	Earning	Hours	Amount	Pay rate	Job	Shift	Shift amt	Shift rate
<input type="checkbox"/>	Coefficient OT	2.5000	17.67	14.1379	Wait Staff (WAIT)	Night Shift (O3)	0.00	0.0000
<input type="checkbox"/>	Coefficient OT	1.5000	10.60	14.1379	Wait Staff (WAIT)	Service Night Shift (S3)	0.00	0.0000
<input type="checkbox"/>	Hourly Pay	11.5000	181.12	15.0000	Wait Staff (WAIT)	Service Night Shift (S3)	8.62	0.0500
<input type="checkbox"/>	Hourly Pay	12.5000	195.00	15.0000	Wait Staff (WAIT)	Night Shift (O3)	7.50	0.6000
<input type="checkbox"/>	Hourly Pay	10.0000	150.00	15.0000	Wait Staff (WAIT)	Morning Shift (O1)	0.00	0.0000
<input type="checkbox"/>	Hourly Pay	10.0000	152.50	15.0000	Wait Staff (WAIT)	Afternoon Shift (O2)	2.50	0.2500

1 of 1 Displaying 1-6 of 6 records Records per page 20 Total: \$530.31

Shift and Overtime Print Options

- Pay statement display enhancements
 - Reduces regular hours with shifts matching coefficient overtime
 - Displays coefficient overtime pay rate as combined time and a half pay rate (or other rate)

Pay Statement

back |
 download |
 print |
 help

Pay Details					
Sophia Amore 21 Hawthorne Blvd Palos Verdes, CA 90723 USA	Employee Number 000010022 SSN XXX-XX-XXXX Job Wait Staff Pay Rate \$15.00 Pay Frequency Weekly	Pay Group Park Hourly Wkly Location Burbank, California Region SW - South West Division ENT - Entertainment Establishmnt NONE - No Establishment Department WAIT - Wait Staff	Federal Income Tax W 0 Additional Federal Income Tax \$15.00 CA State Income Tax (Residence) M 0 CA State Income Tax (Work) M 0		
Earnings					
Pay Type	Hours	Pay Rate	Current YTD		
Hourly Pay			\$43,682.69		
Afternoon Shift	10.0000	\$15.2500	\$152.50		
Morning Shift	10.0000	\$15.0000	\$150.00		
Night Shift	10.0000	\$15.6000	\$156.00		
Serv Night	10.0000	\$15.7496	\$157.50		
Coefficient OT			\$187.27		
Night Shift	2.5000	\$22.6680	\$56.67		
Serv Night	1.5000	\$22.8133	\$34.22		
Total Hours 48.0000					
Deductions					
		Employee		Employer	
Deduction	Based On	Pre-Tax	Current	YTD	Current YTD
- 401K Def Comp	\$0.00	Yes	\$0.00	\$1,550.00	\$663.10
- Dental HMO	\$0.00	Yes	\$0.00	\$580.00	\$1,350.00
- Meal Deduction	\$0.00	No	\$0.00	\$60.00	\$0.00
- Medical HMO	\$0.00	Yes	\$0.00	\$870.00	\$1,800.00
United Way	\$0.00	No	\$0.00	\$270.00	\$270.00
- Vision Plan	\$0.00	Yes	\$0.00	\$580.00	\$580.00
Taxes					
Tax	Based On	Current	YTD		
Federal Income Tax	\$706.89	\$105.62	\$8,054.91		
Employee Medicare	\$706.89	\$10.25	\$632.78		

Feature Benefits

- Improves pay statement to help better understand wages
- Provides more detail on shift and overtime earnings
- Display coefficient overtime pay rate as a combined pay rate

Total Hours Worked

- Total Hours Worked field available for pay statements
 - Provides the actual hours employees worked during the pay period
 - Excludes hours for time that employees did not work
 - Appears next to Total Hours value on the pay statement

Pay Details						
Sophia Amore 21 Hawthorne Blvd Palos Verdes, CA 90723 USA		Employee Number 000010022 SSN xxxxxxxx Job Head Nurse Pay Rate \$30.00 Pay Frequency Weekly	Pay Group Park Hourly Wkly Location Burbank, California Region SW - South West Division ENT - Entertainment Establishmnt NONE - No Establishment Department NUR - Nursing/Medical Asst	Federal Income Tax W 0 Additional Federal Income Tax \$15.00 CA State Income Tax (Residence) M 0 CA State Income Tax (Work) M 0		
Earnings			Deductions			
Pay Type	Hours	Pay Rate	Current	YTD		
Holiday Pay	8.0000	\$30.0000	\$240.00	\$2,160.00		
Hourly Pay	32.0000	\$30.0000	\$960.00	\$37,440.00		
Total Hours Worked	32.0000					
Total Hours	40.0000					
Deductions						
Deduction	Based On	Pre-Tax	Employee Current	Employee YTD	Employer Current	Employer YTD
401K Def Comp	\$50.00	Yes	\$50.00	\$1,350.00	\$17.80	\$600.60
Dental HMO	\$0.00	Yes	\$20.00	\$560.00	\$45.00	\$1,260.00
Meal Deduction	\$0.00	No	\$0.00	\$60.00	\$0.00	\$0.00
Medical HMO	\$0.00	Yes	\$30.00	\$840.00	\$60.00	\$1,680.00
United Way	\$10.00	No	\$10.00	\$270.00	\$10.00	\$270.00
Vision Plan	\$0.00	Yes	\$20.00	\$560.00	\$20.00	\$540.00
Taxes						
Taxes	Based On	Current	YTD			
CA Disability Employee	\$1,130.00	\$10.17	\$339.76			
CA State Income Tax	\$1,080.00	\$25.03	\$1,229.64			
Employee Medicare	\$1,130.00	\$16.38	\$545.78			
Federal Income Tax	\$1,080.00	\$192.86	\$7,074.74			
Social Security Employee Tax	\$1,130.00	\$70.06	\$2,333.68			

Total Hours Worked

Configure Total Hours Worked for Pay Statements

Menu > System Configuration > Business Rules > Earnings

1. From the Earnings business rule, select the earnings to include in Total Hours Worked.
2. From the Details step, check the Total Hours Worked box.
3. Select Next and Save.
4. Contact your Account Manager to complete the configuration.

The screenshot displays the 'Earnings Setup' interface for 'HRLY - Hourly Pay' in the UltiPro software. The interface is divided into a left sidebar with tabs for 'Main', 'Tax', 'Detail' (selected), and 'Summary'. The main content area is titled 'Detail' and contains several configuration sections:

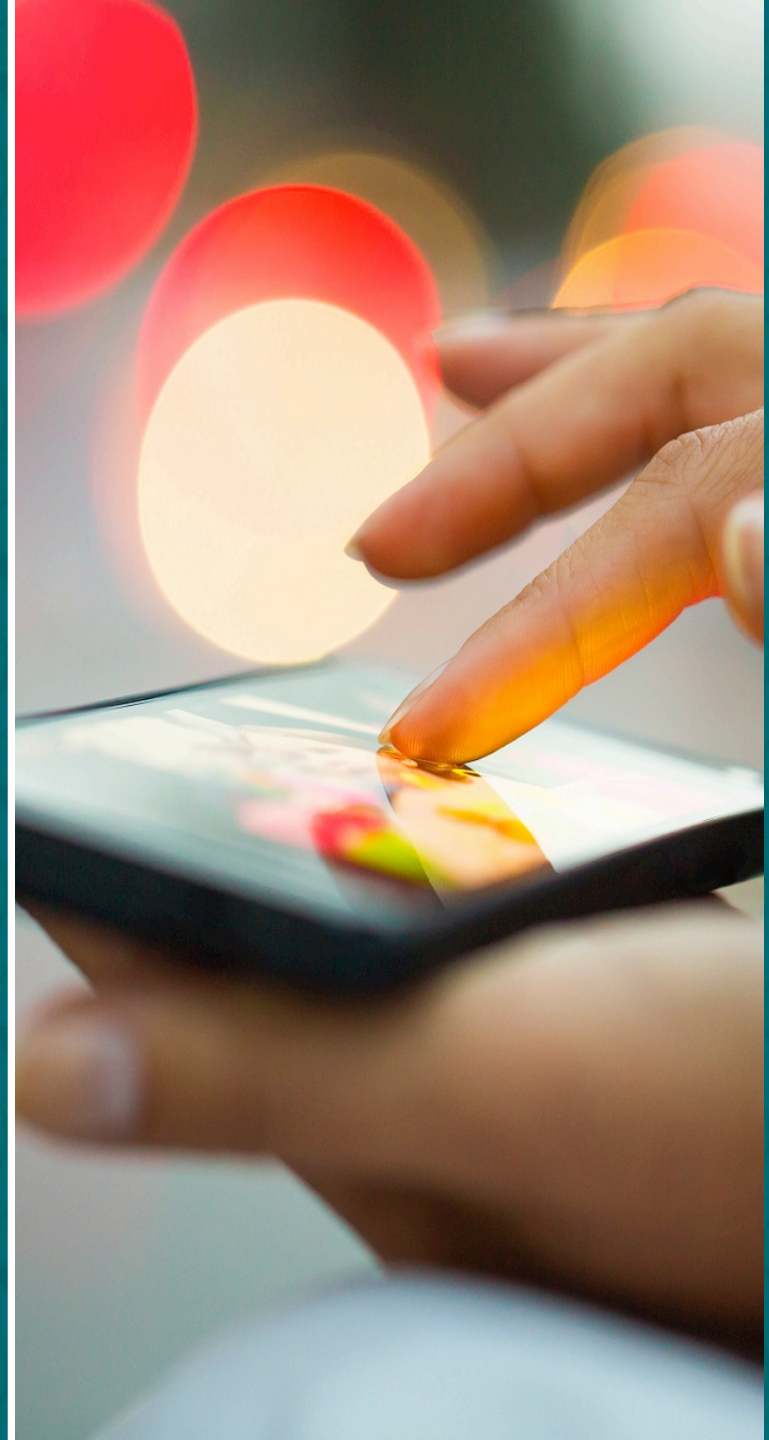
- Scheduled Pay Periods by Default:** Includes checkboxes for First, Second, Third, Fourth, Fifth, and Off-Cycle. 'First', 'Second', and 'Third' are checked.
- Per Pay Check Maximum:** Includes input fields for 'Amount' (set to \$0.0000) and 'Hours' (set to 0.0000).
- Include Earning In:** A grid of checkboxes for various earning types. 'Total Hours Worked' is checked and highlighted with a red box. Other checked items include 'Retroactive pay', 'Deferred compensation dollars', 'FLSA average pay rate dollars', 'Hours accumulation', 'Productive time', 'Shift differential', 'FLSA average pay rate hours', 'Exclude in total hours', 'Allocations', and 'Hours worked for HCSO'. Unchecked items include 'Hours paid for HCSO', 'Health Care Eligibility Hours', 'Wages Paid Last 90 Days', 'Hours Paid Last 90 Days', 'Earnings accumulation', 'Pension accumulation', 'Total benefit hours/earnings', and 'Rest & Recovery Wages'.
- Coefficient Overtime Lookback:** Includes a checkbox for 'Use Coefficient OT Lookback' which is unchecked.

Navigation icons at the top right include back, next, save, reset, cancel, print, and help.

Feature Benefits

- Clarifies the pay statements hours
- Provides the actual time that an employee works

Tax Compliance



Tax Compliance

- Enhanced Wage Attachment Gateway
- Enhanced Form W-4 Completion

Enhanced Wage Attachment Gateway

- New filter and sort options
 - Deduction start date
 - Deduction stop date

Wage Attachments Gateway

print help

Find by **Deduction Start Date** From To Search

Export to starts with [Clear Filters] Displaying all records

			Country	Company	Pay Group	Pay Group Code	Deduction Plan	Jurisdiction	Jurisdiction Plan	Payee
<input type="checkbox"/>	Ar	Sc	United States	To the Max Amusement Park	Park Hourly Wkly	PHRWK	GARN - Garnishment			
<input type="checkbox"/>	Be	M	United States	To the Max Amusement Park	Park Salary Wkly	PSALWK	GARN - Garnishment	CA - California	CAGAR - CALIFORNIA GARN	
<input type="checkbox"/>	B	M	United States	To the Max Amusement Park	Park Salary Wkly	PSALWK	CHILD - Child Support	CA - California	CACSO - CALIFORNIA CHIL	
<input type="checkbox"/>	DeLeon, Jacques M	100100010	United States	Another World Electronics	Electronics BiWkly DDAs	EBWKL	LEVY - IRS Tax Levy	NY - New York	NYLEV - NEW YORK TAX L	
<input type="checkbox"/>	Nicolaou, Christian	000010004	United States	To the Max Amusement Park	Park Salary Wkly	PSALWK	GARN - Garnishment	CA - California	CAGAR - CALIFORNIA GARN	
<input type="checkbox"/>	White, Samuel	000010024	United States	To the Max Amusement Park	Park Union Wkly	PUWKLY	LEVY - IRS Tax Levy	CA - California	CALEV - CALIFORNIA TAX	

Deduction Start Date
Deduction Stop Date

- Name
- Employee Number
- Employee Status
- Country
- Company
- Pay Group
- Pay Group Code
- Region
- Division
- Establishment
- Department
- Deduction Plan
- Jurisdiction
- Jurisdiction Plan
- Payee
- Deduction Start Date
- Deduction Stop Date
- Close



Enhanced Wage Attachment Gateway

- Date fields defined on the garnishment configuration
 - Deduction start date is required
 - Deduction stop date is not required

Add/Change Deduction
Cooper Thomas Aames - 400100016 - UEL Corporate

UltiPro[®] by ULTIMATE SOFTWARE

Start

Details

back next save cancel print help

Type	Garnishment	Jurisdiction	Arizona
Plan	Garnishment	Jurisdiction plan	ARIZONA GARNISH

Deduction Dates		Deduction Amounts	
Start	09/15/2016	Goal rule	Continuing goal
Stop	MM/DD/YYYY	Total goal	\$0.00
		Goal to date	\$0.00
		Goal balance	\$0.00

Wage Attachment

Member / case / reference number

Medical indicator

Include in deduction stacking ?

Payee

Check Handling

Name

Additional check



Enhanced Wage Attachment Gateway

- Filter garnishments three ways:
 - Enter a date in the From field
 - Enter a date in the To field
 - Enter dates in both fields
- Sort using the Deduction Stop Date column
 - Review deductions without a stop date by sorting Stop Date column

Wage Attachments Gateway

Find by From To

Filtered by Last name - starts with Displaying all records


	Name	Employee Number	Country	Company	Pay Group	Pay Group Code	Deduction Plan	Jurisdiction	Jurisdiction Plan	Payee	Deduction Start Date	Deduction Stop Date
i	Amore, Sophia	000010022	United States	To the Max Amusement Park	Park Hourly Wkly	PHRWK	GARN - Garnishment			District Court	1/1/2003 12:00:00 AM	
i	DeLeon, Jacques M	100100010	United States	Another World Electronics	Electronics BiWkly DDAs	EBWKL	LEVY - IRS Tax Levy	NY - New York	NYLEV - NEW YORK TAX LE		7/1/2001 12:00:00 AM	
i	White, Samuel	000010024	United States	To the Max Amusement Park	Park Union Wkly	PUWKLY	LEVY - IRS Tax Levy	CA - California	CALEV - CALIFORNIA TAX	Internal Revenue Service	7/1/2001 12:00:00 AM	
i	Baren, Mark	000010015	United States	To the Max Amusement Park	Park Salary Wkly	PSALWK	CHILD - Child Support	CA - California	CACSO - CALIFORNIA CHIL	Clerk of Courts	1/1/2001 12:00:00 AM	6/1/2001 12:00:00 AM
i	Baren, Mark	000010015	United States	To the Max Amusement Park	Park Salary Wkly	PSALWK	GARN - Garnishment	CA - California	CAGAR - CALIFORNIA GARN	Clerk of Courts	1/1/1999 12:00:00 AM	1/14/2005 12:00:00 AM
i	Nicolaou,	000010004	United	To the Max	Park Salary	PSALWK	GARN -	CA -	CAGAR -		9/1/2004	10/7/2005



Enhanced Form W-4 Completion

Enhanced Employee Withholding Forms (W-4) experience

MENU ▾
Myself Pay



by ULTIMATE SOFTWARE

Jeri Abella ▾
Company
|
To Do
|
Share Ideas
|
Help
|
Logout

Current Pay Statement
Pay History
YTD Summary
Third Party Pay
Direct Deposit
Income Tax
W-2
Find...

Withholding Forms (W-4) ← back print help →

Information

- If you wish to claim exempt from withholding California income taxes, complete the California Exempt (Federal W-4) for state purposes.
- If you wish to claim exempt from California income tax on your wages because you meet the conditions under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act, complete the California DE 4 form.

Add/Change Withholding Form (W-4)

Description	Form
Federal	<ul style="list-style-type: none"> Employee's Withholding Allowance Certificate (W-4) Certificado de Exención de Retenciones del Empleado (W-4(SP)) Employee's Withholding Allowance Certificate (W-4 (NRA))
California	<ul style="list-style-type: none"> California (Federal W-4) California (DE 4)

Current Withholding Forms

Description	Form	Year	Effective ▾	Filing Status	Allowances			Block Withholding	Exempt From Tax
					Claimed	Additional	Additional Amount		
CA State Income Tax	Paper	2012		SINGLE/MARRIED 2 or MORE INCOMES	0	0	\$0.00		
Federal Income Tax	Paper	2012		MARRIED	0	0	\$0.00		

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Enhanced Form W-4 Completion

- All withholding forms are provided for federal and state jurisdictions
 - Provides easy form completion experience, compliant with current regulation forms
- E-mail notification available for expiring exemption status
- UltiPro messages appear, instructing employees to update withholding forms when employees:
 - Add dependents
 - Change marital status



Enhanced Form W-4 Completion

- Withholding forms are provided in questionnaire format
 - Provides guidance when selecting options
 - Provides instant validation of information
 - Streamlines acknowledgment statement and is electronically signed
 - Provides direct link to the full form
 - Provides personal data and elections populated in the form

MENU Myself Pay

UltiPro by ULTIMATE SOFTWARE

Arizona W4StateArizona | To Do | Help | Logout

Current Pay Statement | Pay History | YTD Summary | Third Party Pay | Direct Deposit | **Income Tax** | W-2 | Find...

Withholding - Federal

next | cancel | help

Federal Tax Form W-4

[Full Instructions](#)

*** Filing Status** *W-4 Box 3*
If married, but legally separated, or spouse is a nonresident alien, select the "Single" option.

Single
 Married
 Married, but withhold at higher Single rate

Last Name *W-4 Box 4*
 Your last name differs from that shown on your Social Security card.

*** Allowances** *W-4 Box 5*
See [Full Instructions](#) for details.
Total number of allowances you are claiming.

Things I Can Do
FOR THIS TAB SET
[Add Direct Deposit](#)
[Change Pay Statement Preference](#)
[Add/Change Withholding Form \(W-4\)](#)
[Change W-2 Consent Form](#)

Quick Tours and Tips
[Pay Section Overview](#)
[Add a Direct Deposit Account Tour](#)
[View Your Form W-2 Tour](#)



Enhanced Form W-4 Completion

- Enhanced administrative processes for Form W-4
 - Display or hide forms
 - Configure exemption expiration email notification and reset of withholding elections
 - Regulate max allowances per state and employer form requirements
 - Upload paper forms



Feature Benefits

- Streamlines administrative process
- Provides configuration options
- Simplifies employee experience
- Maintains form updates from new legislation
- Eliminates browser compatibility issues

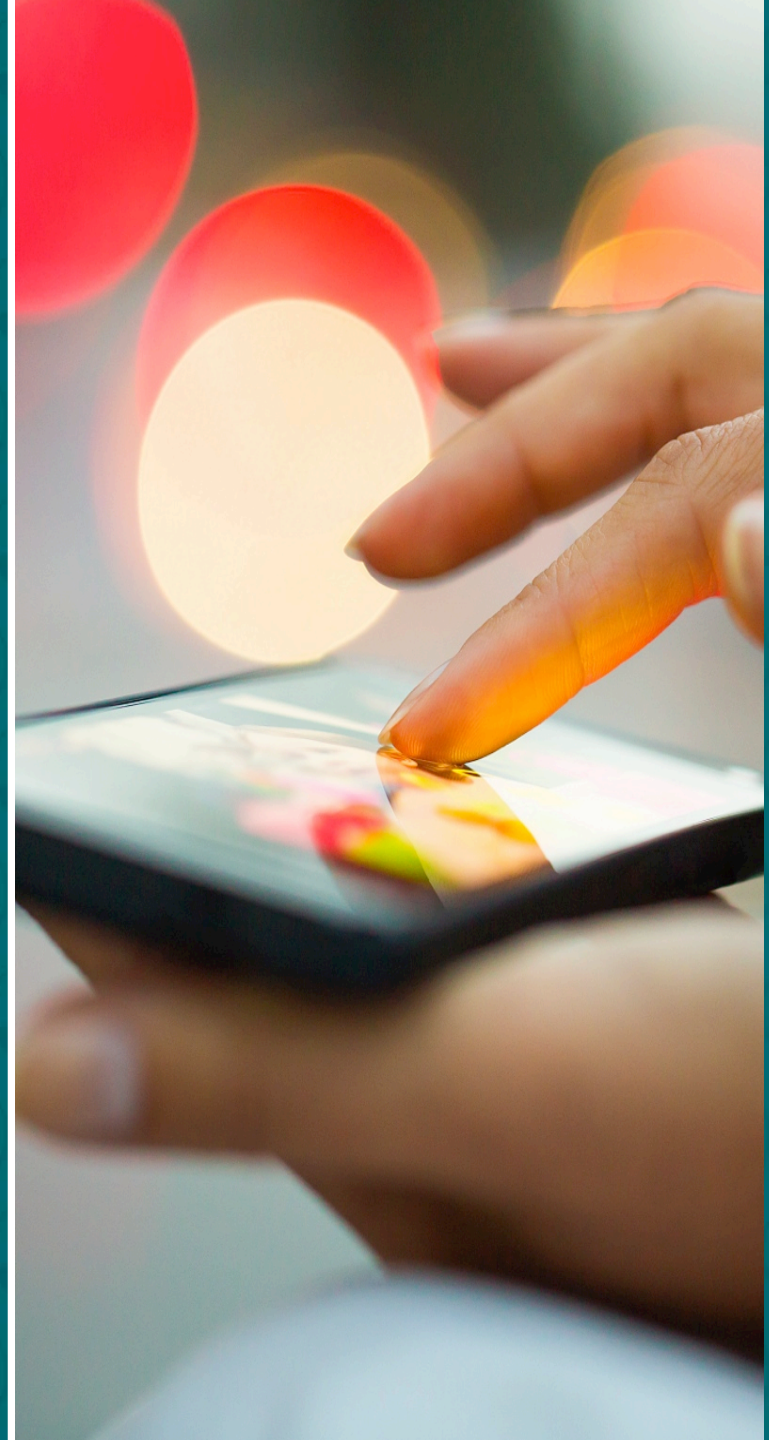


Upcoming Webcasts

- Enhanced Form W-4 Completion and Employer Management
 - Date: 10/26/16
 - Time: 1:00pm – 2:00pm
 - <https://ultimate.webex.com/ultimate/onstage/g.php?MTID=e91ce3941d53c22fb6e8da73f9ab067ee>

- Enhanced Form W-4 Completion and Employer Management
 - Date: 10/26/16
 - Time: 3:00pm – 4:00pm
 - <https://ultimate.webex.com/ultimate/onstage/g.php?MTID=e94dc06e32d61b4d4826ad2b91f394330>

Time Management

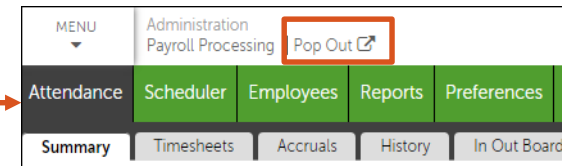
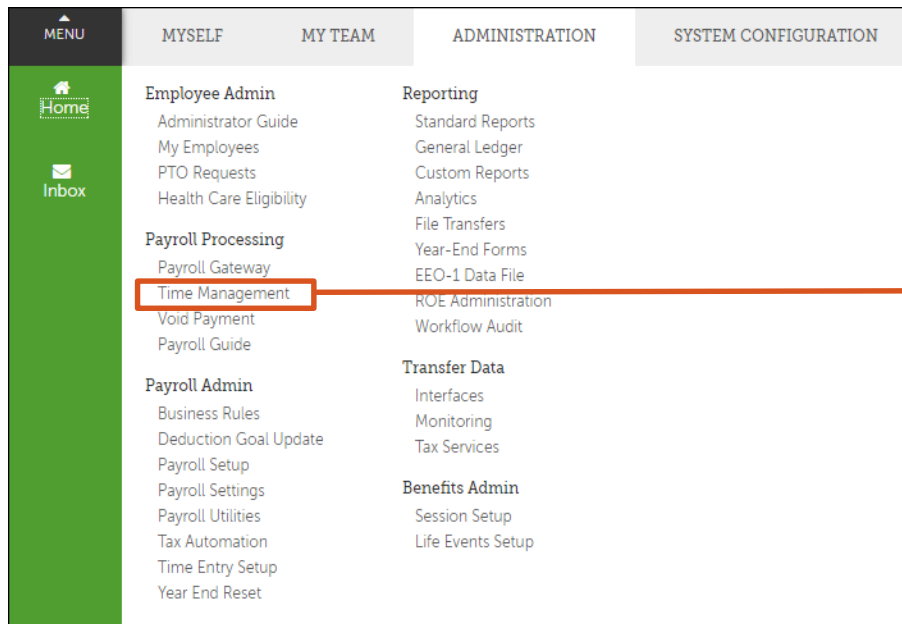


Time Management

- Navigation Changes
- Timesheet Enhancements
- Pay Rate Synchronization
- Smart Recalc
- Multi-Lingual Capability

Navigation Changes

- New Navigation for Time Management
 - Launches within UltiPro
 - Uses the new navigation framework, colors, and fonts
 - Contains a Pop Out option for administrators to open application in a new browser or window, if desired



Navigation Changes

Employee timesheet displays in UltiPro

Navigation: MENU | Administration | Payroll Processing | **Pop Out** | UltiPro by ULTIMATE SOFTWARE | Norma Automate | To Do | Share Ideas | Help | Logout

Attendance: Scheduler | Employees | Reports | Preferences | EWS Setup | Users Setup | Tools | Company Setup | Rules Setup | Payroll | HW Devices | Dashboard | Messages

Summary: Timesheets | Accruals | History | In Out Board | Posting | Events

Employee: Smith, Linda [View Schedule](#)

Details: Location: Florida | Job: Delivery | Pay Policy: UTM01 | Shift Number: Fixed M-F 8:30AM-4:30PM / 30 Min Meal | Pay Category: Full Time | Holiday Rule: UTM HOLIDAY

Date Selection: Current Pay Period | Layout: Detail

Timesheet for: September 25, 2016 to October 01, 2016 | Status: OPEN

Summary

Pay Matrix

Paycode	Pay ID	Hours	Rate	Pay Amount
-	-	0.0000	\$ 0.0000	\$ 0.00

Point System

Point Rule	Description	Last Post Date	Post Type	Balance	Notes
-	-	-	-	0.00	-

Accrual

Pay Code	Code	Last Post Date	Post Type	Accrued/Used	Available	Notes
-	-	-	-	0.00	0.00	-

Timesheet Detail

Save | Add | Delete | Cancel | Columns | Multi Add | Insert/Repost | Approve | Print

Date	PayCode	Job	In	In Exp	Out	Out Exp
Sun 09/25/2016	Unscheduled					
Mon 09/26/2016	Absent		08:30AM		04:30PM	
Tue 09/27/2016	Absent		08:30AM		04:30PM	
Wed 09/28/2016	Scheduled		08:30AM		04:30PM	

Things I Can Do

- Manage Time-Off Requests

Quick Tours and Tips

- Approving Time Off Requests Quick Tour
- Delegate Supervisor Approvals Quick Tour
- 840e-UltiPro Time Management for Supervisors

Navigation Changes

Employee timesheet displays in "Pop Out" window

The screenshot displays the UltiPro Time Management interface. At the top, there is a navigation bar with a 'MENU' dropdown and 'Administration Payroll Processing' text. The main navigation bar includes 'Payroll Gateway', 'Time Management', 'Void Payment', and 'Payroll Guide'. The 'Time Management' section is active, showing a sub-menu with 'Attendance', 'Scheduler', 'Employees', 'Reports', 'Preferences', 'EWS Setup', 'Users Setup', 'Tools', 'Company Setup', 'Rules Setup', 'Payroll', 'HW Devices', 'Dashboard', and 'Messages'. Below this, there is a 'Summary' section with a sub-menu including 'Summary', 'Timesheets', 'Accruals', 'History', 'In Out Board', 'Posting', and 'Events'. The 'Summary' section displays the following information:

Pay Cycle: Weekly, starting Sun
Date Selection: Current Pay Period
From: 09/25/2016
To: 10/01/2016
Last updated: Wednesday, 09/28/2016 9:12 AM
Filtered by initiated date range is between 09/25/2016 and 10/01/2016 [Clear Filters]

Group / Filter By: All Employee Search [Go]
Status Filter: All Active Only

Unopened Timesheets: 24 [Open all timesheets]
Opened Timesheets: 3 [Save] [Approve this Page]

ID	NAME	Sch.Hr	Reg.Hr	OT	DT	Timesheet Status
230932120-GCDQM	Smith, Linda	37.50	0.00	0.00	0.00	OPEN
342323323-GCDQM	Burns, Oliva	37.50	0.00	0.00	0.00	OPEN
874847844-GCDQM	Janet, Armstrong	37.50	0.00	0.00	0.00	OPEN

1

Navigation Changes

- Supervisor View of Summary Page

– Before

The screenshot shows the UltimePro interface with the following elements:

- Top navigation bar: Attendance, Scheduler, Employees, Reports, Preferences, Tools (highlighted), Dashboard (highlighted), Inbox 4 (highlighted), Help, Exit.
- Sub-navigation bar: Summary (selected), Timesheets, Accruals, History, In Out Board, Unclaimed.
- Summary section:
 - Pay Cycle: Weekly, starting Mon
 - Date Selection: Current Pay Period
 - From: 08/29/2016, To: 09/04/2016
 - Last updated: Tuesday, 08/30/2016 1:06 PM
 - Buttons: Update, Update Schedules
 - Filtered by initiated date range is between 08/29/2016 and 09/04/2016
 - Group / Filter By: All, Employee Search, Go
 - Status Filter: All, Active Only (checked)
 - Unopened Timesheets: 19 (Open all timesheets)
 - Opened Timesheets: 0 (Save, Approve this Page)
- Table header: ID, Name, Timesheet Status, Sch.Hr, Reg.Hr, OT, Absent

– Now

The screenshot shows the updated UltimePro interface with the following elements:

- Top navigation bar: My team Time Management, UltimePro by ULTIMATE SOFTWARE, Tommy Dawson, To Do, Help, Logout.
- Sub-navigation bar: Attendance, Scheduler, Employees, Reports, Preferences, Tools (highlighted), Dashboard (highlighted), Messages 7 (highlighted).
- Summary section:
 - Pay Cycle: Biweekly, starting Mon (Ref: 07/14/2008)
 - Date Selection: Current Pay Period
 - From: 08/15/2016, To: 08/28/2016
 - Last updated: Thursday, 08/25/2016 10:50 AM
 - Buttons: Update, Update Schedules
 - Filtered by initiated date range is between 08/15/2016 and 08/28/2016
 - Group / Filter By: All, Employee Search, Go
 - Status Filter: All, Active Only (checked)
 - Unopened Timesheets: 7 (Open all timesheets)
 - Opened Timesheets: 3 (Save, Approve this Page)
- Table header: ID, NAME, Absent, Early In, Early Out, Tardy, Late Out, Long Meal, Missed Punch, Auto-Deduct Meal, No Meal, Overtime, Sch.Hr, Reg.Hr, OT, DT, OT3, Timesheet Status
- Table row: 454534355-GCDRX, Warner, Issac, 1, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0.00, 37.00, 0.00, 0.00, 0.00, OPEN

Timesheet Enhancements

- Employee View of Timesheet
 - Before

The screenshot displays the UltiPro Time Management interface. At the top, the logo 'UltiPro Time Management' is on the left, and 'Inbox 7 | Help | Exit' is on the right. Below the logo, there are tabs for 'Attendance' and 'Scheduler'. Under 'Scheduler', there are sub-tabs for 'Timesheets' and 'History'. The 'Timesheets' tab is active, showing a 'Display:' dropdown set to 'Current Pay Period' and a date range from '08/29/2016' to '09/04/2016'. A 'Layout:' dropdown is set to 'Detail'. A red box highlights a printer icon in the top right corner. Below this, the date and time 'Thursday, 09/01/2016 9:43:57 AM Eastern Time' are shown. A red box highlights a section containing a 'Notes' text area, 'Punch' and 'Transfer' buttons, and a 'Today's Schedule' summary table. The summary table shows: Job: VP Cust Sup Help Desk (HLPDSKVP), Total Hours: 0.00, Hours This Week: 0.00 Regular, 0.00 Overtime. Below the summary, the 'Timesheet' status is 'OPEN'. An 'Action:' bar contains buttons for 'Save', 'Add', 'Delete', 'Undo', 'Recalculate', 'Insert/Repost', and 'Submit'. A table with columns 'Date', 'PayCode', 'In', 'Out', 'Reg', and 'OT' is shown below the buttons. At the bottom, there are expandable sections for 'Weekly Summary', 'Timesheet Summary', 'Accrual Summary', and 'Point System Summary'.

Timesheet Enhancements

- Employee View of Timesheet
 - Now

Attendance Scheduler Messages 1

Timesheets History

Date Selection: « Current Pay Period »

My Timesheet for August 29, 2016 to September 11, 2016

▼ Summary

Pay Matrix

Paycode	Pay ID	Hours	Rate	Pay Amount
-	-	0.0000	\$ 0.0000	\$ 0.00

Weekly

Date Range Of Week	Reg	OT	DT	OT3
08/29/2016 ~ 09/04/2016	0.00	0.00	0.00	0.00
09/05/2016 ~ 09/11/2016	0.00	0.00	0.00	0.00

Accrual

Pay Code	Code	Last Post Date	Post Type	Accrued/Used	Available	Notes
2[VACATION]	VACAT	08/01/2016	U	0.00	100.00	
3[SICK LEAVE]	ILLNES	08/22/2016	T	8.00	92.00	Usage
4[PERSONAL LEAVE]	PERS	08/01/2016	U	100.00	100.00	

Point System

Point Rule	Description	Last Post Date	Post Type	Balance	Notes
-	-	-	-	0.00	-

▼ Timesheet Detail

Submit Print Wednesday, 08/31/2016 3:16:50 PM Eastern Time Notes Punch Transfer

	Date	PayCode	Location	Job	In	Out	Reg	OT
	Mon 08/29/2016	Absent			02:30PM	10:00PM	0.00	0.00
	Tue 08/30/2016	Absent			02:30PM	10:00PM	0.00	0.00
	Wed 08/31/2016	Scheduled			02:30PM	10:00PM	0.00	0.00
	Thu 09/01/2016	Scheduled			02:30PM	10:00PM	0.00	0.00
	Fri 09/02/2016	Scheduled			02:30PM	10:00PM	0.00	0.00

Things I Can Do

[Add PTO Request](#)

Quick Tours and Tips

[Request Time Off](#)

841e - Time Management for Employees Overview

Timesheet Enhancements

Supervisor View of Employee Timesheet

Summary
Timesheets
History
In Out Board

Active

Supervisor:
 Employee: Search
 Pay Cycle: Biweekly, starting Mon (Ref: 07/14/2008)

←
17
View Schedule

Warner, Issac
 Location: **Florida** Job: **Executive** Pay Policy: **UTM BI-WEEKLY** Shift Number: **DEFAULT SHIFT** Pay Category: **Full Time**
 Holiday Rule: **UTM HOLIDAY**

Date Selection: Current Pay Period

Timesheet for August 15, 2016 to August 28, 2016

▽
Summary

Adjustment Group By: Paycode

Type	Pay Code	Reg Hrs	OT	DT	Total Hrs	Earnings	Deductions	Work Period
Cur. TS	0[WORK HOURS]	25.50	0	0	25.50	\$0.00	\$0.00	08/15/16-08/28/16
Cur. TS	3[SICK LEAVE]	8.00	0	0	8.00	\$0.00	\$0.00	08/15/16-08/28/16
Cur. TS	18[ON CALL]	3.50	0	0	3.50	\$0.00	\$0.00	08/15/16-08/28/16
Totals		37.00	0.00	0.00	37.00	\$0.00	\$0.00	

Pay Matrix

Paycode	Pay ID	Hours	Rate	Pay Amount
0[WORK HOURS]	Regular	25.5000	*****	*****
3[SICK LEAVE]	Regular	8.0000	*****	*****
18[ON CALL]	Regular	3.5000	*****	*****

Point System

Point Rule	Description	Last Post Date	Post Type	Balance	Notes
-	-	-	-	0.00	-

Things I Can Do

- Manage Time-Off Requests

Quick Tours and Tips

- Approving Time Off Requests Quick Tour
- Delegate Supervisor Approvals Quick Tour
- 840e-UltiPro Time Management for Supervisors

Status: **OPEN**

Unopened Timesheets: **7**

NAME	ID
Warner, Issac	454534355-GCDRX
Waston, Jackie	767684322-GCDRX
Weston, 100 West	786786873-GCDRX

Timesheet Enhancements

Supervisor View of Employee Timesheet Detail Section

Warner, Issac View Schedule

Location: **Florida** Job: **Executive** Pay Policy: **UTM BI-WEEKLY** Shift Number: **DEFAULT SHIFT** Pay Category: **Full Time** Holiday Rule: **UTM HOLIDAY**

Accrual

Pay Code	Code	Last Post Date	Post Type	Accrued/Used	Available	Notes
2[VACATION]	VACAT	08/01/2016	U	0.00	100.00	
3[SICK LEAVE]	ILLNES	08/22/2016	T	8.00	92.00	Usage
4[PERSONAL LEAVE]	PERS	08/01/2016	U	100.00	100.00	

Timesheet Detail

This employee has a pending time off request for this pay period.

Save
 Add
 Delete
 Cancel
 Columns
 Multi Add
 Insert/Repost
 Approve
 Print

	Date	PayCode	In	In Exp	Out	Out Exp	Reg	OT	DT	Daily Hours	Total Hours	Earn/Ded
	Mon 08/15/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
	Tue 08/16/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
	Wed 08/17/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
	Thu 08/18/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
	Fri 08/19/2016	0[WORK HOURS]	08:00AM		04:30PM		8.50	0.00	0.00	8.50	8.50	\$ 0.00
	Sat 08/20/2016	18[ON CALL]					3.50	0.00	0.00	3.50	3.50	\$ 0.00
	Sun 08/21/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
	Mon 08/22/2016	3[SICK LEAVE]					8.00	0.00	0.00	8.00	8.00	\$ 0.00
	Tue 08/23/2016	0[WORK HOURS]	08:00AM		04:30PM		8.50	0.00	0.00	8.50	8.50	\$ 0.00

Timesheet Enhancements

- User Name Preference
- Timesheet Status Change Option
- New Time-off Alert Link (Detail and Hourly Timesheets)
- Columns Button on Detail Timesheet
- Notes Pop-Up on Detail Timesheet
- Recalculate Button Removed

User Name Preference

Timesheet Audit Trail can show User Name instead of User ID

Attendance > Timesheets > Magnifying Glass icon in Audit column

Attendance Scheduler Employees Reports Preferences Tools Dashboard Messages 7

Summary Timesheets History In Out Board

Active

Supervisor:

Employee: Search

Pay Cycle: Biweekly, starting Mon (Ref: 07/14/2008)

All (No Group Filter)

All Timesheets Count: 3

NAME	ID ▲
Warner, Issac	454534355-GCDRX
Waston, Jackie	767684322-GCDRX
Weston, 100 West	786786873-GCDRX

Unopened Timesheets: 7

NAME	ID ▲
Heines, Yolanda	454545333-GCDRX
O'mally, Thomas	656456576-GCDRX
Wilson, George	676778688-GCDRX
Wilson, Yanice	786788870-GCDRX
Walter, Ivan	786878980-GCDRX

Date	Type	Usage
08/01/2016	VACAT	0.00 100.00
08/22/2016	ILLNES	8.00 92.00 Usage

Timesheet Audit Trail

Audit Trail For Employee

Employee ID: 454534355-GCDRX Employee Name: Issac Warner Current Time: 08/29/2016 02:39PM

Original Data:

In Time:	In IP Address:	In Site/Clock:	Comes From:
			Timesheet Entry
Out Time:	Out IP Address:	Out Site/Clock:	Comes From:
			Timesheet Entry

Change History:

Change Date	User	Action	Work Date	Paycode	IN	OUT	Reg	OT 1	OT 2	OT 3	Reason	I/O Exception
8/24/2016 5:57:25 PM	TOMMY DAWNSON	Add	08/19/2016	0[WKHR]	8/19/2016 8:00:00 AM	8/19/2016 4:30:00 PM	8.50	0.00	0.00	0.00		

User Name Preference


- Select User Name on the Preference page

Users Setup > Preference

30. User delegation display preference:

*Note: This controls the display of user using the User ID or the User Full Name for the following pages. The default is User ID.

- (1) Delegation dropdown
- (2) Timesheet Audit page
- (3) Scheduler > Template page's Audit feature
- (4) Scheduler > Free Form page's Audit feature



User Name 

- Select magnifying glass icon to display audit report

Attendance > Timesheet or Summary

Timesheet Detail

Save Add Delete Cancel Columns Multi Add Insert/Repost Approve Print

	Date	In	In Exp	Out	Out Exp	Reg	OT	DT	Daily Hours	Total Hours	Earn/Ded	MILES	Notes	Reason	Audit
	Sun 09/11/2016					0.00	0.00	0.00	0.00	0.00					
	Mon 09/12/2016	3:30AM		12:00PM		3.50	0.00	0.00	0.00	3.50	\$ 0.00	0.00			
	Mon 09/12/2016	1:00PM	M 60	04:30PM		3.50	0.00	0.00	7.00	3.50	\$ 0.00	0.00			

Timesheet Status Change Option

- Note the Status Change option applies to both hourly and detail timesheets
- Select Status and change it to any level below the current status

The screenshot displays the 'Timesheets' tab for employee Warner, Issac. The interface includes a navigation bar with 'Summary', 'Timesheets', 'History', and 'In Out Board'. The main content area shows the employee's details, including location (Florida), job (Executive), pay policy (UTM BI-WEEKLY), and shift (DEFAULT SHIFT). A 'Status' dropdown menu is highlighted with a red box, showing options: OPEN, SUBMIT, and APPROVED. The current status is 'OPEN'. Below the status dropdown, there is a 'Summary' section.

Summary | Timesheets | History | In Out Board

Active

Supervisor: Employee: Search

Pay Cycle: Biweekly, starting Mon (Ref: 07/14/2008) [v]

All [v] (No Group Filter) All Timesheets [v] Count: 3

NAME ID

Warner, Issac 454534355-GCDRX

Warner, Issac View Schedule

Location: Florida Job: Executive Pay Policy: UTM BI-WEEKLY Shift Number: DEFAULT SHIFT

Pay Category: Full Time Holiday Rule: UTM HOLIDAY

Date Selection: Current Pay Period [v]

Timesheet for August 15, 2016 to August 28, 2016 Status: OPEN SUBMIT APPROVED


Summary

New Time-Off Alert Link

- Available from both hourly and detail timesheets
- Applies to pending requests during a pay period
- Enables supervisors to select the link and go to Manage Time-Off Requests page (Scheduler > Requests)
- Displays only those requests for the selected employee and pay period

▼ Timesheet Detail

 This employee has a pending time off request for this pay period.

 Save  Cancel  Copy  Approve  Print

Week1. [09/25/2016-10/01/2016]

Pay Code	Job	Sunday Sep-25	Monday Sep-26	Tuesday Sep-27	Wednesday Sep-28	Thursday Sep-29	Friday Sep-30	Saturday Oct-1	Total	
50[VACATION 2]	PTO [PTO Group]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	8.00	<input type="text"/>	<input type="text"/>	8.00	✕
52[PERSONAL 2]	PTO [PTO Group]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	8.00	<input type="text"/>	8.00	✕
Daily Totals:		0.00	0.00	0.00	0.00	8.00	8.00	0.00	16.00	

Week2 [10/02/2016-10/08/2016]

Pay Code	Job	Sunday Oct-2	Monday Oct-3	Tuesday Oct-4	Wednesday Oct-5	Thursday Oct-6	Friday Oct-7	Saturday Oct-8	Total	
<--Select-->	PTO [PTO Group]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Daily Totals:		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

New Time-Off Alert Link

Manage Time-Off Requests page shows the pending time-off request

Attendance Scheduler Employees Reports Preferences Tools Dashboard Messages 7

Template Schedules Free Form Schedules Recap Requests Calendars

Manage Time-Off Requests

print >

Things I Can Do
View Calendar

Quick Tours and Tips
Approving Time Off Requests Quick Tour
Responding to Requests for Time Off Quick Tip

TO DO

5 All 3 New 1 Modify Pending 1 Cancel Pending

Find by: Requested Date From MM/DD/YYYY To MM/DD/YYYY Search
Request Status Is [] []

Result Summary: 0 Employees, 0 Approved, 0 Pending, 0 Declined, 0 Canceled Displaying 1 to 1 of 1 record(s)

Action Approve Deny Email Calendar Appointment

<input type="checkbox"/>	Name	Type	Hours Requested	Hours Available	Alerts	Comments	Date Submitted	Date Requested	Supervisor	Status	Seniority Date
<input type="checkbox"/>	Issac Warner	SICK LEAVE	8.00	92.00			08/24/2016 05:37 PM	From: 08/22/2016 To: 08/22/2016	Tommy Dawson	Cancel Pending	04/02/2008

Page Size: 10

Columns Button on Detail Timesheet

- New Columns button available to all users
- Users can select and reorder timesheet columns

The screenshot shows the 'Timesheet Detail' interface. At the top, there is a warning icon and the text: 'This employee has a pending time off request for this pay period.' Below this, a toolbar contains several buttons: Save, Add, Delete, Cancel, Columns (highlighted with a red box), Multi Add, Insert/Repost, Approve, and Print. An orange arrow points from the 'Columns' button to the 'Timesheet Column Setup' dialog box.

The 'Timesheet Column Setup' dialog box has a title bar with a close button. It contains a 'Notes' section with the following text: 'Double-click from one list to another as needed, or use the buttons in the center of the screen to move items between the Available and Selected lists. To adjust order of items, select item in the right list combo then click 'up' and 'down' arrow.'

Below the notes is a section for '* Required Items (In user defined order.)'. It features two lists: 'Available Items' and 'Selected Items'. The 'Available Items' list contains: 'In Express Code', 'Out Express Code', and 'MILES'. The 'Selected Items' list contains: '*Work Date vs. Punch Date', '*Date', '*Paycode', '*In Time', '*Out Time', '*Reg. Hrs', '*OT', '*DT', 'Daily Hrs', 'Total Hrs', 'Earn./Ded.', 'Notes', 'Reason Code', and 'Audit'. Between the two lists are four arrow buttons: a single right arrow, a double right arrow, a single left arrow, and a double left arrow. To the right of the 'Selected Items' list are two vertical arrow buttons (up and down). At the bottom of the dialog are three buttons: 'Default', 'OK', and 'Cancel'.

Note: With the addition of the Columns button, the column picker to the far right () has been removed along with the Freeze Timesheet Display option in the Timesheet Column Setup section.

Notes Pop-Up on Detail Timesheet

- Pop-up window appears when a note is added to timesheet row
- Note can be viewed and then closed without saving timesheet

The screenshot shows a software interface for viewing a timesheet. At the top, there are tabs for 'Summary', 'Timesheets', 'History', and 'In Out Board'. The main header displays the employee's name 'Warner, Issac' and a 'View Schedule' button. Below this, a summary bar shows: Location: Florida, Job: Executive, Pay Policy: UTM BI-WEEKLY, Shift Number: DEFAULT SHIFT, Pay Category: Full Time, and Holiday Rule: UTM HOLIDAY. A warning icon indicates a pending time off request. A toolbar contains buttons for Save, Add, Delete, Cancel, Columns, Multi Add, Insert/Repost, Approve, and Print. The main area is a table with columns: Date, PayCode, In, In Exp, Out, Out Exp, Reg, OT, DT, and Daily Hours. A pop-up window is overlaid on the table, showing a text area with the note 'Called in sick at 7 a.m.' and 'OK' and 'Cancel' buttons.

Date	PayCode	In	In Exp	Out	Out Exp	Reg	OT	DT	Daily Hours
Mon 08/15/2016	Unscheduled					0.00	0.00	0.00	0.00
Tue 08/16/2016	Unsch								
Wed 08/17/2016	Unsch								
Thu 08/18/2016	Unsch								
Fri 08/19/2016	0[WORK								
Sat 08/20/2016	18[ON CALL]					3.50	0.00	0.00	3.50
Sun 08/21/2016	Unscheduled					0.00	0.00	0.00	0.00
Mon 08/22/2016	3[SICK LEAVE]					8.00	0.00	0.00	8.00

Recalculate Button Removed

■ Before



■ Now

Warner, Issac [View Schedule](#)

Location: Florida Job: Executive Pay Policy: UTM BI-WEEKLY Shift Number: DEFAULT SHIFT Pay Category: Full Time Holiday Rule: UTM HOLIDAY

Accrual

Pay Code	Code	Last Post Date	Post Type	Accrued/Used	Available	Notes
2[VACATION]	VACAT	08/01/2016	U	0.00	100.00	
3[SICK LEAVE]	ILLNES	08/22/2016	T	8.00	92.00	Usage
4[PERSONAL LEAVE]	PERS	08/01/2016	U	100.00	100.00	

Timesheet Detail

This employee has a pending time off request for this pay period.

Save **Add** **Delete** **Cancel** **Columns** **Multi Add** **Insert/Repost** **Approve** **Print**

Date	PayCode	In	In Exp	Out	Out Exp	Reg	OT	DT	Daily Hours	Total Hours	Earn/Ded
Mon 08/15/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Tue 08/16/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Wed 08/17/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Thu 08/18/2016	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Fri 08/19/2016	0[WORK HOURS]	08:00AM		04:30PM		8.50	0.00	0.00	8.50	8.50	\$ 0.00
Sat 08/20/2016	18[ON CALL]					3.50	0.00	0.00	3.50	3.50	\$ 0.00

Feature Benefits

- Improves readability and ease of use of the timesheets
- Groups actions together
- Enables you to easily change the timesheet status
- Provides supervisors with the ability to quickly manage an employee's time-off requests
- Improves speed of entry for hourly timesheet users

Pay Rate Synchronization

- Employee base pay rate is imported via integration
 - Information populates in Labor Costing reports and displays on the timesheet in the summary
 - Current rate and prior rate are brought into timesheet
 - UltiPro effective date is used
- Minimum wage tables also imported via integration
 - Tables support new compliance rules that require minimum wage for validation and payment of violations

Note: These changes were included with the Time Management Monthly Release on September 15, 2016.

Pay Rate Synchronization

Example of Detail Report.LC

Reports > Report Generator > Labor Costing > Detail Report.LC

Date	Pay Code	IN	OUT	Job	Rate	Reg Hrs	OT Hrs	Daily Total	Total Pay	
Report Date: 09/08/2016 Report Time: 1:07:07 PM										
Primary Sort By: Job (G3) 08/15/2016 - 08/28/2016 [14 days]										
Job: BARBACK [BarBack]										
876878799-GCDRX [Walker, Jessica]										
Full Name		Walker, Jessica		Shift Number		1 [DEFAULT SHIFT]		Employee Status		A
08/15/2016 Mon		08:00AM*	04:30PM*	BARBACK	\$47.75	8.50		8.50	\$405.88	
08/16/2016 Tue		08:00AM*	04:30PM*	BARBACK	\$47.75	8.50		8.50	\$405.88	
876878799-GCDRX [Walker, Jessica] Total:						17.00	0.00	17.00	\$811.75	
BARBACK [BarBack] Total:						17.00	0.00	17.00	\$811.75	
Head Count: 1										
Job: HOSTESS [Hostess]										
876878799-GCDRX [Walker, Jessica]										
Full Name		Walker, Jessica		Shift Number		1 [DEFAULT SHIFT]		Employee Status		A
08/17/2016 Wed		08:00AM*	04:30PM*	HOSTESS	\$32.50	8.50		8.50	\$276.25	
876878799-GCDRX [Walker, Jessica] Total:						8.50	0.00	8.50	\$276.25	
HOSTESS [Hostess] Total:						8.50	0.00	8.50	\$276.25	
Head Count: 0										
Job: RECEIPT [Receptionist]										
876878799-GCDRX [Walker, Jessica]										
Full Name		Walker, Jessica		Shift Number		1 [DEFAULT SHIFT]		Employee Status		A
08/18/2016 Thu		08:00AM*	04:30PM*	RECEIPT	\$38.90	8.50		8.50	\$330.65	
08/19/2016 Fri		08:00AM*	04:30PM*	RECEIPT	\$38.90	6.00	2.50	8.50	\$379.28	
876878799-GCDRX [Walker, Jessica] Total:						14.50	2.50	17.00	\$709.93	
RECEIPT [Receptionist] Total:						14.50	2.50	17.00	\$709.93	
Head Count: 0										
Grand Total:						40.00	2.50	42.50	\$1,797.93	
Head Count: 1										
END OF REPORT										

Pay Rate Synchronization

Feature is enabled through UltiPro

System Configuration > Time Management Setup > Integration Configuration > Import Employee Pay Rate option

The screenshot displays the 'Integration Configuration' page in UltiPro. The page has a green header with tabs for 'Integration Default', 'Integration Status', and 'Integration Configuration'. A search bar labeled 'Find..' is in the top right. Below the header, there are icons for 'save', 'reset', 'cancel', 'print', and 'help'. The main content area is divided into three sections: 'Web Service', 'Mobile Web Service', and 'Enhanced Functionality'. The 'Web Service' section includes fields for 'Web Service URL', 'Client ID', 'User name', 'Password', and 'Device ID'. The 'Mobile Web Service' section includes fields for 'Web Service URL', 'User name', 'Password', 'Device ID', and 'Days To Renewal'. The 'Enhanced Functionality' section contains several checkboxes: 'Use User Employee Role', 'Import Time Clock ID', 'Default Schedule Request Approver', and 'Import Employee Pay Rate'. The 'Import Employee Pay Rate' checkbox is checked and highlighted with a red border.

Section	Field	Value
Web Service	Web Service URL	http://examplewebserviceurl
	Client ID	test123
	User name	testimport
	Password	*****
	Device ID	a1234bcd-11be-5678-9a22-3e4df5c67c89
Mobile Web Service	Web Service URL	http://examplewebserviceurl
	User name	testimport
	Password	*****
	Device ID	d12345b8-000c-6677-b999-123g4abcd888
	Days To Renewal	9
Enhanced Functionality	Use User Employee Role	<input type="checkbox"/>
	Import Time Clock ID	<input type="checkbox"/>
	Default Schedule Request Approver	<input checked="" type="checkbox"/>
	Import Employee Pay Rate	<input checked="" type="checkbox"/>

Feature Benefits

- Displays pay rate information in reports and on the timesheets
- Supports new compliance rules

Smart Recalc

- Smart Recalc ensures that events are labeled correctly
- Smart Recalc contains two parts:
 - Self-healing task status changes to Completed if task is in either Running or Started status and has last run completed time stamp and 100 percent progress
 - Task fails if a task of the same type is run
 - RECALC_UNCALCED_TS_JOB only runs on timesheets that are less than 30 days

Task	Description	Created By	Status	Priority	Next Run	Scheduled Days (SMTWTF S)	Last Run Started	Last Run Completed	Delete	
RECALC_UNCALCED_TS_JOB	RecalcJob#RECALC_UNCALCED_TS_JOB	System	Completed	100%	0	9/8/2016 4:22:37 PM	1111111	9/8/2016 4:22:43 PM	9/8/2016 4:22:46 PM	Delete

Note: These changes were included with the Time Management Monthly Release on July 12, 2016.

Feature Benefits

Prevents customer-scheduled events from displaying as “Removed” or “Failed”

Multi-Lingual Capability

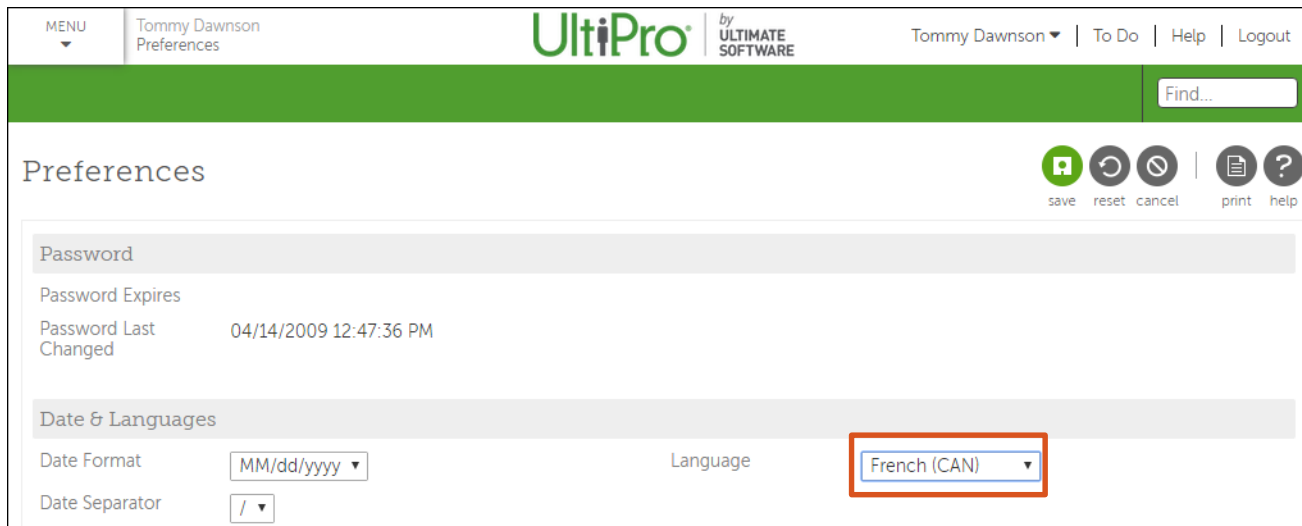
- Time Management delivers all standard reports and mobile experiences in UltiPro in Canadian French
- All pages, data in tables, icons, and buttons are translated to user's preferred language
- Multiple entries of descriptions (for example, pay codes, policies, and rules) are allowed for users to view information in UltiPro selected language preference

Note: These changes were included with the Time Management Monthly Release on June 14, 2016.

Multi-Lingual Capability

Change Language Preferences

1. From the Home page, select Preferences.
2. From the Preferences page, select Edit.
3. From the Language drop-down list, select the preferred language.
4. Select Save.



Note: These changes were included with the Time Management Monthly Release on June 14, 2016.

Multi-Lingual Capability

Time Management displays in French

(FR) MENU | Mon équipe | Gestion du temps | (fr) Pop Out

UltiPro by ULTIMATE SOFTWARE | Tommy Dawson | À faire | Aide | Fermeture de session

Présence | Programmeur | Employés | Rapports | Préférences | Outils | Tableau de bord | Messages

Résumé | Feuilles de temps | Historique | Tableau d'entrée/sortie

Résumé

Cycle de paie : Quinzaine, à compter du dim. (Réf. : 07/1) | Sélection de la date : Période de paie actuelle | De : 09/11/2016 | À : 09/24/2016 | Dernière mise à jour : Mercredi, 09/14/2016 2:36 PM | Mettre à jour | Actualiser les horaires

La valeur filtrée par plage de date initiale est entre 09/11/2016 et 09/24/2016 [Supprimer les filtres]

Groupe/Filter par : Tous | Recherche d'employé | GO

Filter du statut : Tous | Actifs uniquement

Feuilles de temps non ouvertes : 7 | Ouvrir toutes les feuilles de temps

Feuilles de temps ouvertes : 3 | Enregistrer | Approuver cette page

IDENTIFIANT ▲	NOM	Absent	Entrée anticipée	Sortie anticipée	Retard	Sortie tardive	Repas long	Pointage manqué	Repas déduit automatiquement	Aucun repas	Heures supplémentaires	Hr prog.	Hr norm.	HS	TD	HS3	Statut de la feuille de temps
454534355-GCDRX	Warner, Issac	1	0	0	0	0	1	0	0	0	0	75.00	7.00	0.00	0.00	0.00	OPEN
676778688-GCDRX	Wilson, George	2	0	0	0	0	0	0	0	0	0	75.00	0.00	0.00	0.00	0.00	OPEN
786878980-GCDRX	Walter, Ivan	2	0	0	0	0	0	0	0	0	0	75.00	0.00	0.00	0.00	0.00	OPEN

1

Note: These changes were included with the Time Management Monthly Release on June 14, 2016.

Feature Benefits

- Provides Time Management pages in a user's preferred language
- Opens the possibility of delivery in other supported languages

Learning Resources

Title	Description	Resource Type	New or Update
Manage Supervisor Delegations	Provides procedural information for supervisors on how to delegate access to your employees, be a delegate, and change delegate view options.	QuickTips	Update
Create and Assign Points in the Point System Module	Provides instructions for creating, calculating, and assigning points in the Point System Module.	QuickTips	New
Configure Accrual Rules in Time Management	Provides instructions for defining employee benefit accrual rule calculations.	QuickTips	New
Configure Overtime Banking for Accruals	Provides instructions for employers outside the United States to apply bank hours toward work hours or non-working hours.	QuickTips	New
Enable UltiPro Time Management Mobile Features	Provides configuration instructions and troubleshooting tips for the Time Management mobile features.	QuickTips	New

Connections Hands-On Learning Sessions



Connections 2017 takes place from **March 21-24, 2017** at the **Bellagio in Las Vegas**. The conference will include an amazing roster of speakers, breakout sessions, entertainers, and UltiPro® training.

Get the most out of Connections 2017 by attending UltiPro Hands-on Learning Sessions in one of our 4 special-interest topic areas.

Session Details:

- 12 courses are available in the following topic areas:
 - Payroll
 - Reporting & Analysis
 - System Configuration
 - Compensation Management
- 2.5 hours to 3 hours in length
- Sessions offered each day on Tuesday, Wednesday, and Thursday

Registering for Hands-On Learning Sessions



1. Register Now for Connections 2017

- Go to ultimatesoftware.com > Events > Connections Conference
OR ultimatesoftware.com/connections

2. Specific course topics announced in November

3. Course schedules shared in January 2017

4. Session registration will be available in February 2017 to reserve a seat in your favorite session topic.

5. See you there!

A black and white photograph of a woman with glasses smiling, overlaid with a teal gradient. The background shows a classroom with a chalkboard and other people.

Thanks ...

... for participating in today's webcast!

Commonly-Asked Questions

Question: How do I download the presentation slides file?

Answer: From your WebEx session, select File > Transfer. From the File Transfer window, select the file and then select Download. Enter the site in which to save the file and select Save.

