Ultipro Time Management (UTM)

User Manual for Employees

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Introduction

Ultimate Software/Ultipro, delivers the most flexible, comprehensive solutions for companies to strategically manage their HR, payroll, benefits, and talent management functions. The Ultipro web-based time and payroll software will help you keep track of your time worked, time off requests as well as enabling you to print pay stubs and tax information, etc. The system also allows Payroll and Managers to access critical information and reports quickly to perform routine business activities more efficiently.

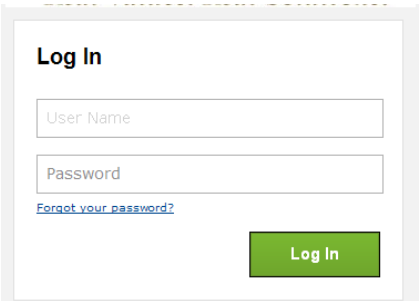
This manual is an outline that highlights key features of the Time Management portion. Some items may not be available to all employees and some features may look slightly different, but the fundamental concepts are the same.

NOTE: this document features screen shots from Firefox. Different browsers and versions will display certain screens differently.

Logging In

The link will be provided to you separately, as well as your user name and password.

The first time you log in, you will be asked a series of security questions that are used in case you forget your password.



Once you are logged in, you will see at least two icons – Myself and My Company.

Myself is where key information about your personal employment is kept - including, but not limited to, personal information, career information, time management links, pay and benefits.

My Company is an area where company wide information will be posted.

If you have forgotten your password, you can click the “Forgot your password?” link.

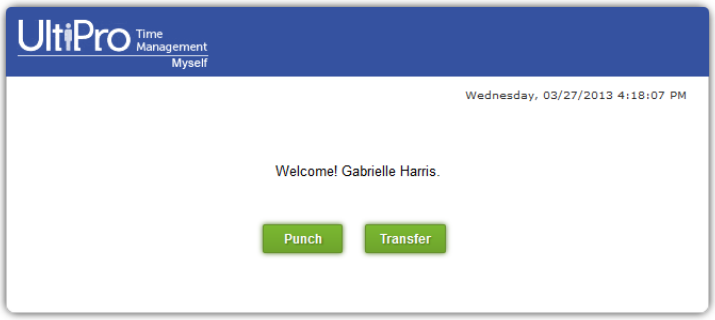
If you attempt to log in more than three times without the correct user name and password, the system locks you out. Call HR to reinstate your credentials.

Please note: all employees are assigned a “home” organizational level structure. Depending on your company’s structure, this may include home location, department, division, etc. By default, punches are assigned to this home structure.

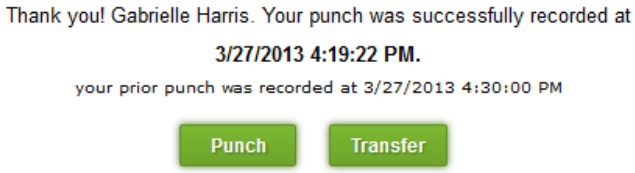
Punching

A punch is a real-time entry into your timesheet – be it as an in-punch, out-punch or leaving or coming back from a meal break.

In order to register a punch, click Myself>>Time Clock Entry



Clicking the "Punch" button registers a punch with UTM into either your home organizational level or the last transferred organizational level.



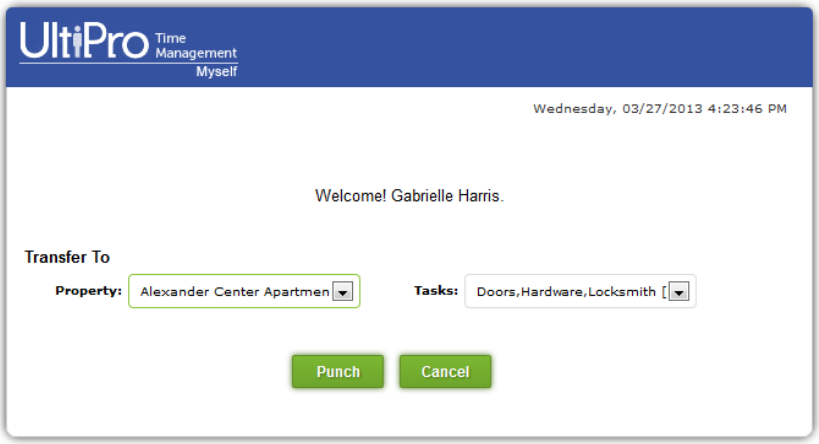
When finished, it is a "best practice" to click LOGOUT in the upper right corner. The system will time out, but for security purposes it is recommended to always logout.

Transferring

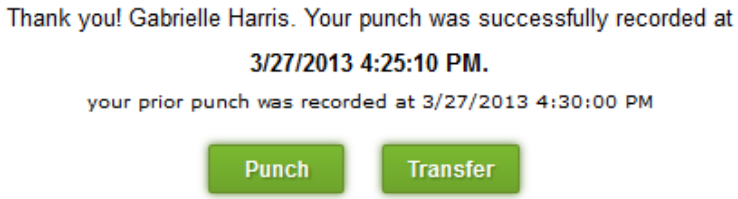
If you need to transfer to a different organizational ("org") level, you would hit "transfer" instead of "punch". Once you transfer to a different org level, you stay in that org level through either the end of your shift or until the next transfer. So if you go on a meal break, you would only need to "punch" in and out of the meal and you would stay within your transferred org level.

NOTE: Org levels are different for different groups of people. Yours may look different than the included screen shots, but the functionality is the same.

In this example, our test employee can choose "Property" and "Tasks". Each has a drop down – you may choose to change one or both. Once you've chosen, click "Punch" and you will be transferred out of your prior org structure and into the new one.



Once you click "Punch" you will receive an accepted message:



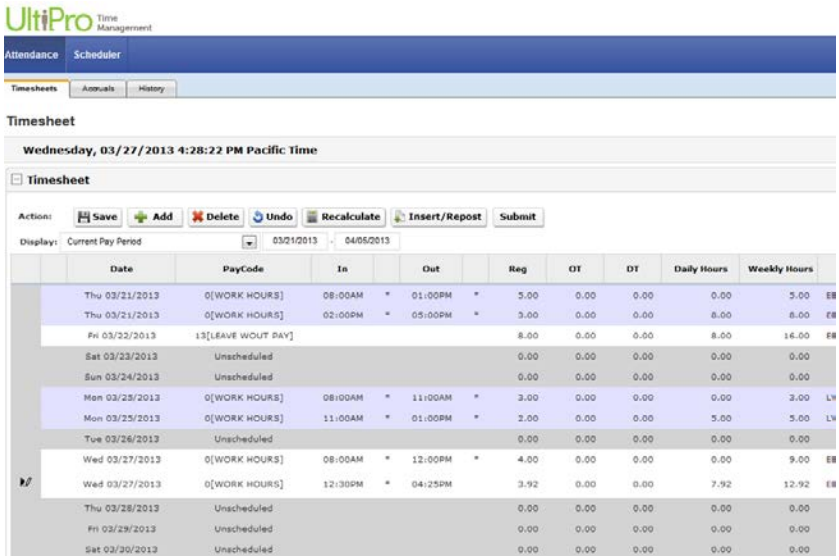
Accessing Timesheets

Employees may access UTM itself in order to edit (if allowed) and review timesheets, submit timesheets to their supervisor for approval, review and print timesheets from prior payrolls and submit requests for time off. In addition, there may be other tabs with information to review such as accrual history, point system history and punch history, depending on your specific access needs.

To access UTM, go to Myself>>Time Management. UTM will open in a new window. Depending on your browser settings, this MAY be blocked as a pop up. Inform IT if that is the case. It also may open behind your existing window, again depending on your particular computers browser settings.

Basic Navigation

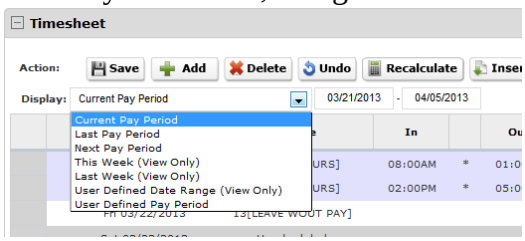
Once in UTM, you have two "pages" – Attendance and Scheduler



Your tabs may vary, but a general overview is:

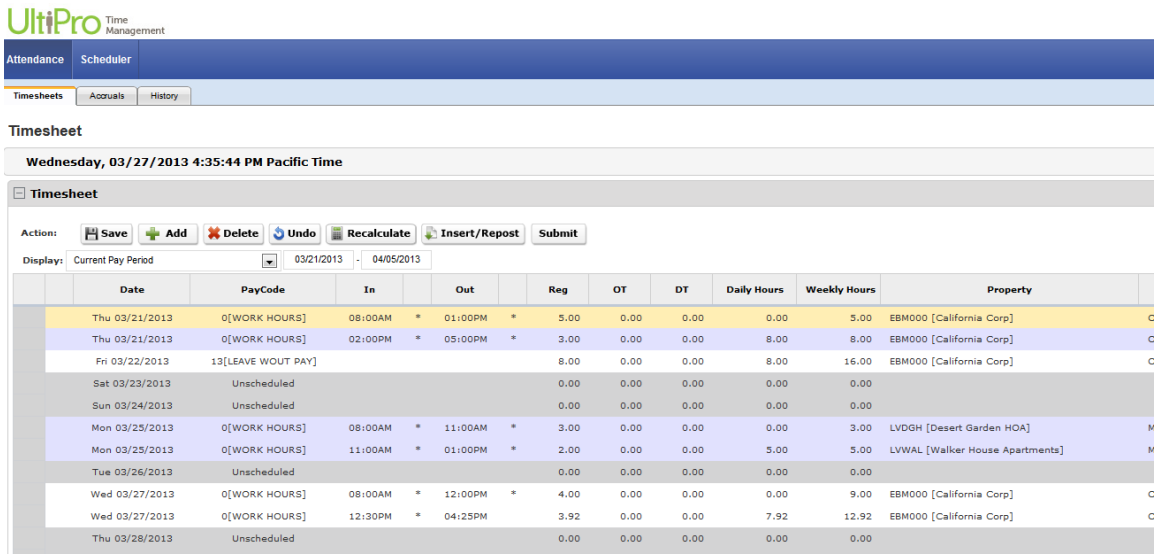
- **Attendance>>Timesheet** – this is your timesheet and is where you can edit (if allowed), review and submit your timesheet to your supervisor for approval
- **Attendance>>Accrual** –Review your accruals history
- **Attendance>>History** –Review your attendance history on a date range basis including any exceptions and view details and summaries
- **Scheduler>>Request** – Where you may place requests for future time off
- **Scheduler>>Calendar** –Review the status/dates of your requested time off

In nearly all screens, navigation to different date ranges occurs via the display dropdown.



If choosing "User Defined Pay Period", choosing the calendar icon allows for navigation. Clicking any date in a pay period brings up that specific pay period. Clicking today brings you back to the current pay period.

Attendance>>Timesheet



Date	PayCode	In		Out		Reg	OT	DT	Daily Hours	Weekly Hours	Property
Thu 03/21/2013	0[WORK HOURS]	08:00AM	*	01:00PM	*	5.00	0.00	0.00	0.00	5.00	EBM000 [California Corp]
Thu 03/21/2013	0[WORK HOURS]	02:00PM	*	05:00PM	*	3.00	0.00	0.00	8.00	8.00	EBM000 [California Corp]
Fri 03/22/2013	13[LEAVE WOUT PAY]					8.00	0.00	0.00	8.00	16.00	EBM000 [California Corp]
Sat 03/23/2013	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Sun 03/24/2013	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Mon 03/25/2013	0[WORK HOURS]	08:00AM	*	11:00AM	*	3.00	0.00	0.00	0.00	3.00	LVDGH [Desert Garden HOA]
Mon 03/25/2013	0[WORK HOURS]	11:00AM	*	01:00PM	*	2.00	0.00	0.00	5.00	5.00	LVWAL [Walker House Apartments]
Tue 03/26/2013	Unscheduled					0.00	0.00	0.00	0.00	0.00	
Wed 03/27/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	9.00	EBM000 [California Corp]
Wed 03/27/2013	0[WORK HOURS]	12:30PM	*	04:25PM		3.92	0.00	0.00	7.92	12.92	EBM000 [California Corp]
Thu 03/28/2013	Unscheduled					0.00	0.00	0.00	0.00	0.00	

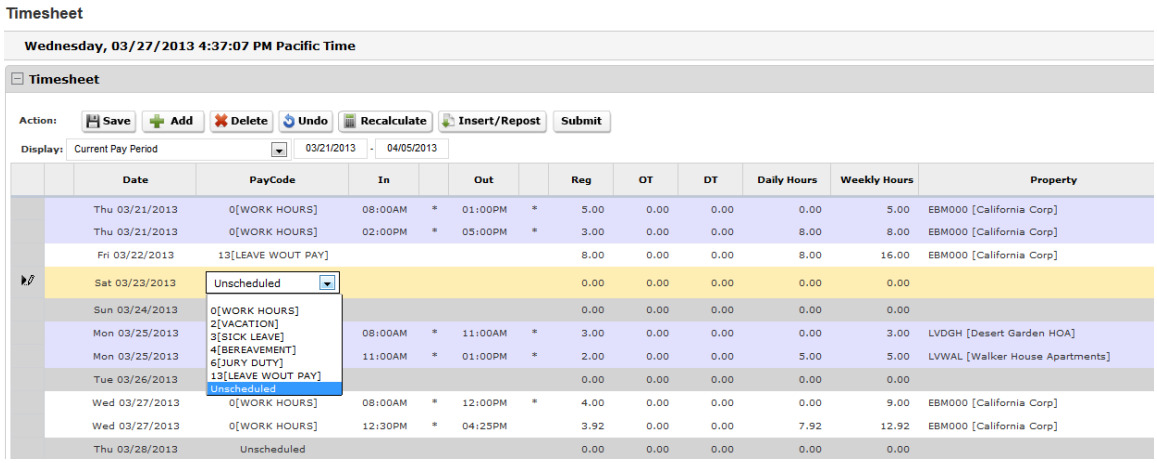
The timesheet has quite a few column options. Note: Not all are visible to all employees depending upon their permissions. Some of them are:

- **Paycode** – the earnings code where time should be posted
- **In/Out** – the punches associated with worked hours. An "*" indicates an edit entered punch – if no "*" exists, the punch came from a web/clock punch.
- Note: A RED square indicates a MISSED or MISSING PUNCH.
- **Reg/OT/DT** – Regular, Overtime, Doubletime – Non worked codes (PTO, HOL, etc) will be entered in the "REG" column.
- **Daily Hours** – a sum of all hours posted to that day
- **Weekly Hours** – for non weekly pay cycles, this gives an accumulated total for each week
- **Org Levels** – specific department/Cost Center levels
- **Notes** – free form notes field

Timesheet Status: there are four default status indicators

- **OPEN** – indicates an unapproved, still active timesheet
- **SUBMIT** – indicates a timecard an employee has submitted to their supervisor for approval
- **APPROVED** – indicates a timecard a supervisor has signed off on
- **PAYROLL** – indicates a timecard that has been closed by the payroll department for processing

Editing a Timesheet



To edit a timesheet, you first choose the date, then the earnings code. If the earnings code is a calculated code, such as worked hours, it will require in and out punches. In and out punches may be entered in AM/PM or military format. Once you click "Save" the calculation will occur according to your company policies for overtime, etc. If the earnings code is a non-calculated code, such as PTO, then you would simply enter the bulk hours under "Reg".

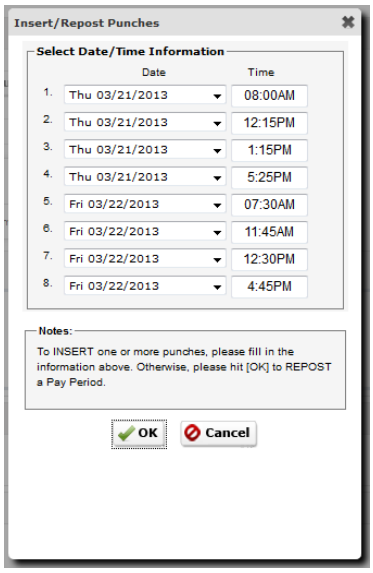
The Undo button undoes all work since your last save. The Delete button deletes an entire row of data. If you just want to delete an individual punch, simply hitting the "delete" key on your keyboard will delete it. Add will add a row to your timecard. If you enter data in the wrong date order – for example if 12/2 was above 12/1 – once you hit save, it will order it properly.

Notes on Holidays/Special Pay: For full time employees, Holiday will usually be auto posted. And in most cases will be a fixed amount. In some cases, the company may choose to grant a special Holiday in which case it may need to be manually entered. Special Pay's are determined by the company and will be either entered by the supervisor or the Admin's. An example might be Worker's Comp.

Insert/Repost for Timesheets

There are two “shortcut” methods that can dramatically speed up data entry on a timesheet – Insert/Repost and Multi-Add. They both may not be available to all employees, depending upon needs.

Insert/Repost allows you to enter up to 8 punches at once on a timesheet. If you need to add a set of punches into the middle of a day, for instance, it’s the perfect tool. You can use Tab on the keyboard to cycle through the fields. Punches can be either AM/PM or military time.

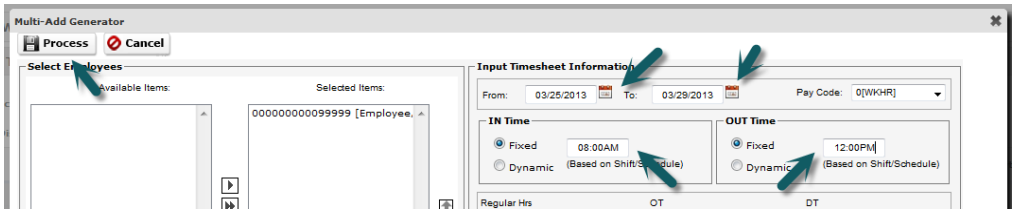


The results would be:

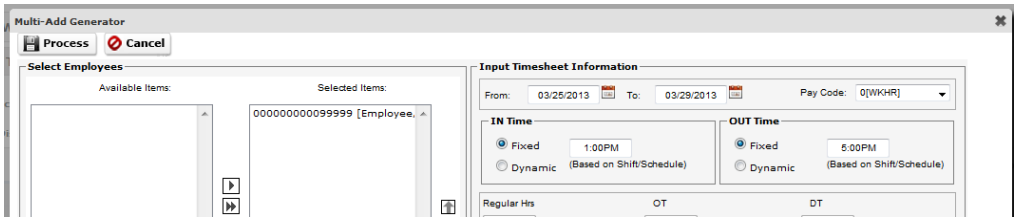
Date	PayCode	In		Out		Reg	OT	DT	Daily Hours	Weekly Hours
Thu 03/21/2013	0[WORK HOURS]	08:00AM	*	12:15PM	*	4.25	0.00	0.00	0.00	4.25
Thu 03/21/2013	0[WORK HOURS]	01:15PM	*	05:25PM	*	3.75	0.42	0.00	8.42	8.42
Fri 03/22/2013	0[WORK HOURS]	07:30AM	*	11:45AM	*	4.25	0.00	0.00	0.00	12.67
Fri 03/22/2013	0[WORK HOURS]	12:30PM	*	04:45PM	*	3.75	0.50	0.00	8.50	16.92

Multi-Add for Timesheets

Multi-Add allows you to add sets of punches for a range of dates. For instance, if you wanted to add the following punches to an entire week: 8:00 AM in, 12:00 PM lunch out, 12:30 PM lunch in, 4:30 PM out, you would do this:



Then this:



The results would be:

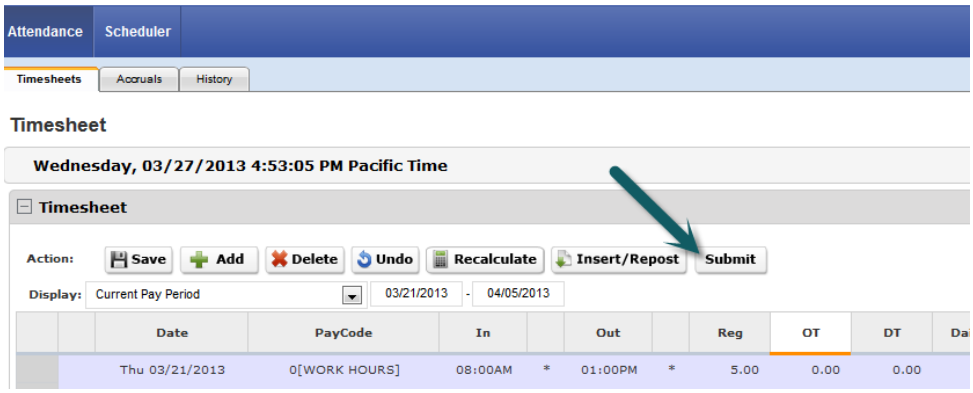
Mon 03/25/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	4.00	300
Mon 03/25/2013	0[WORK HOURS]	01:00PM	*	05:00PM	*	4.00	0.00	0.00	8.00	8.00	300
Tue 03/26/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	12.00	300
Tue 03/26/2013	0[WORK HOURS]	01:00PM	*	05:00PM	*	4.00	0.00	0.00	8.00	16.00	300
Wed 03/27/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	20.00	300
Wed 03/27/2013	0[WORK HOURS]	01:00PM	*	05:00PM	*	4.00	0.00	0.00	8.00	24.00	300
Thu 03/28/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	28.00	300
Thu 03/28/2013	0[WORK HOURS]	01:00PM	*	05:00PM	*	4.00	0.00	0.00	8.00	32.00	300
Fri 03/29/2013	0[WORK HOURS]	08:00AM	*	12:00PM	*	4.00	0.00	0.00	0.00	36.00	300
Fri 03/29/2013	0[WORK HOURS]	01:00PM	*	05:00PM	*	4.00	0.00	0.00	8.00	40.00	300
Sat 03/30/2013	Unscheduled					0.00	0.00	0.00	0.00	0.00	

And if afterwards, you needed to edit a punch or two, it would be far easier than entering them one at a time.

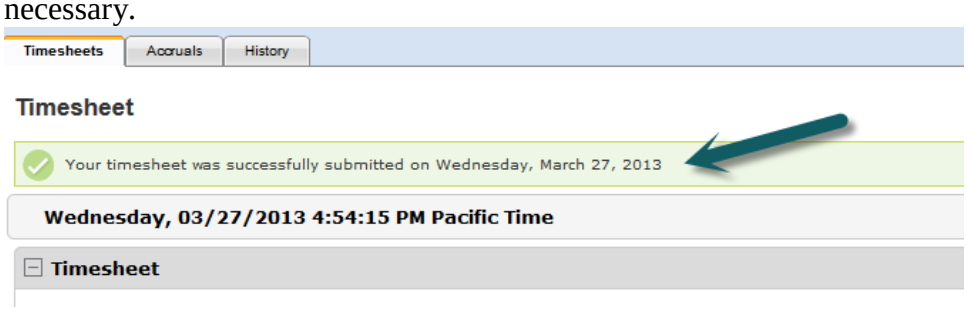
Multi-Add can also facilitate org level transfers as well as bulk posting of non worked hours.

Submitting a Timesheet

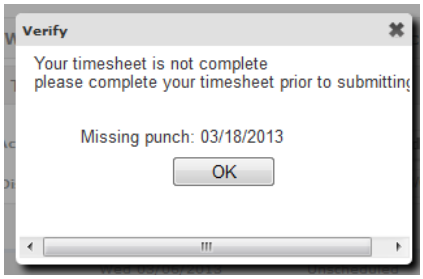
When a pay period is finished, you can submit your timecard for approval to your supervisor. Hitting "Submit" brings up a verification window where you indicate that you agree with the timesheet and are signing off on it. Your supervisor will be notified you have submitted a timesheet and will then review and approve it for payroll.



Once submitted, the status changes to SUBMIT. You can no longer edit a timecard in "submit" status. However, your supervisor can reverse the status back to open if necessary.

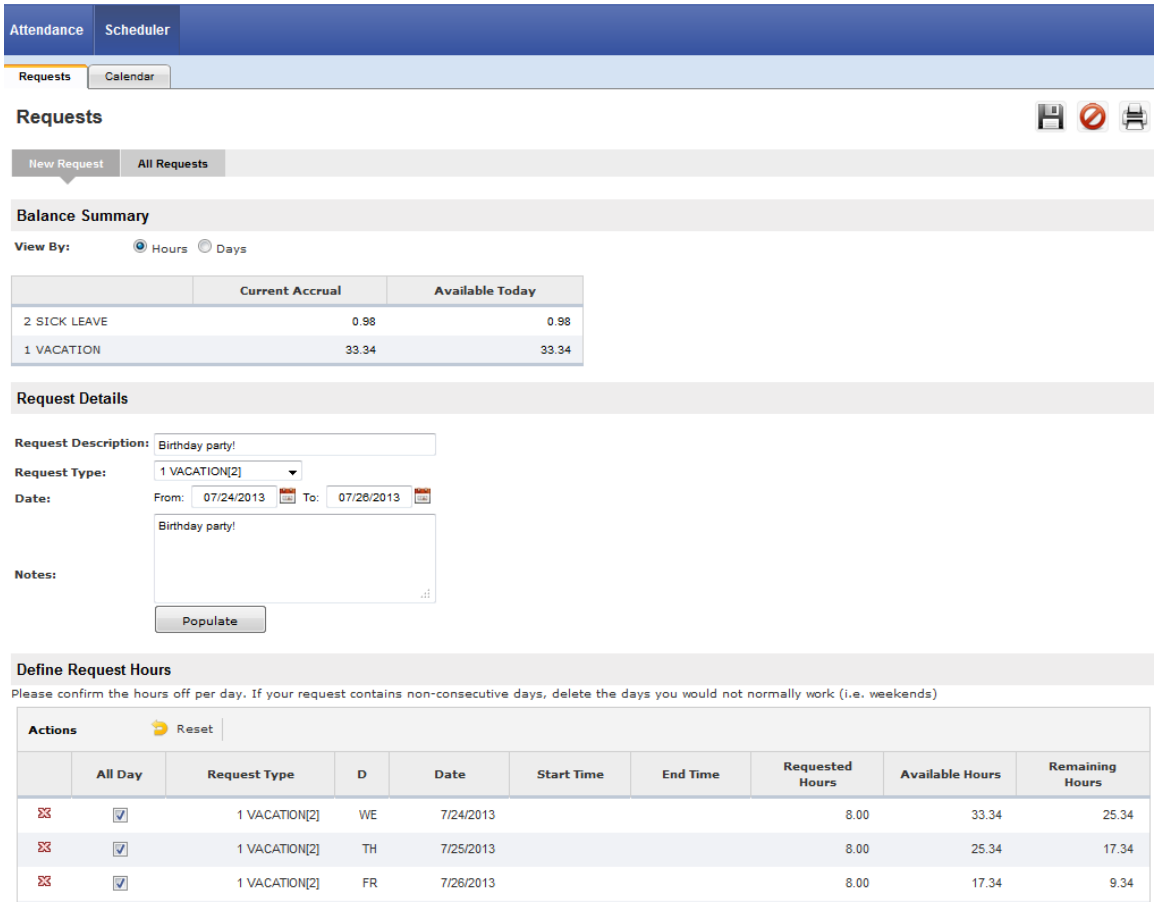


However, if you have any missed, uncorrected punches, you will not be allowed to submit.



Requesting Time Off

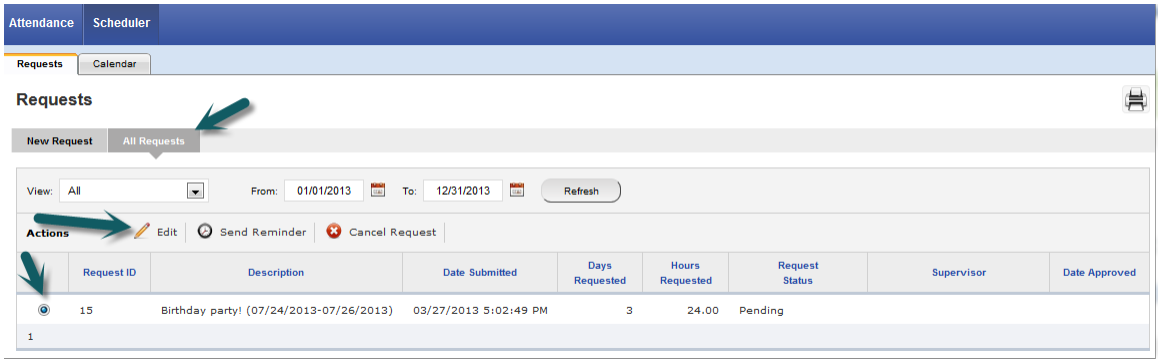
Going to Scheduler>>Request brings up the time off request area.



Requesting time off is fairly straightforward:

1. Name the Request and choose the Request Type (PTO, Vacation, etc)
2. Choose the start and end times using the calendars (may cross weekends)
3. Click Populate to populate the dates
4. Add Notes if desired
5. Modify the hours if necessary
6. Click the save icon – your scheduler will receive an email detailing your time off request

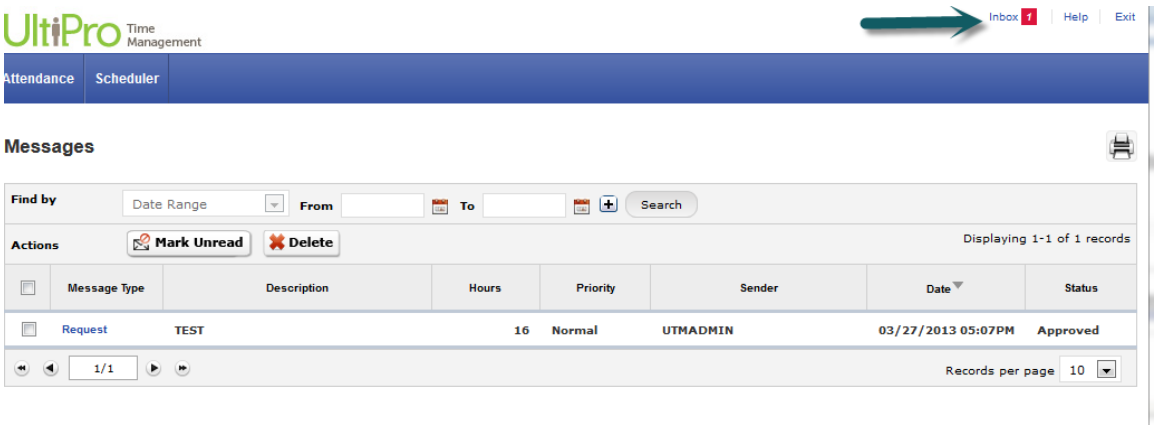
Once submitted, you can view your history on the All Requests tab:



There are three things you can do with a submitted request – cancel request, edit the request and remind supervisor of the request pending.

Reviewing Approvals/Declines

Once your supervisor has approved or declined your time off request, you will receive a message the next time you go into Time Management.

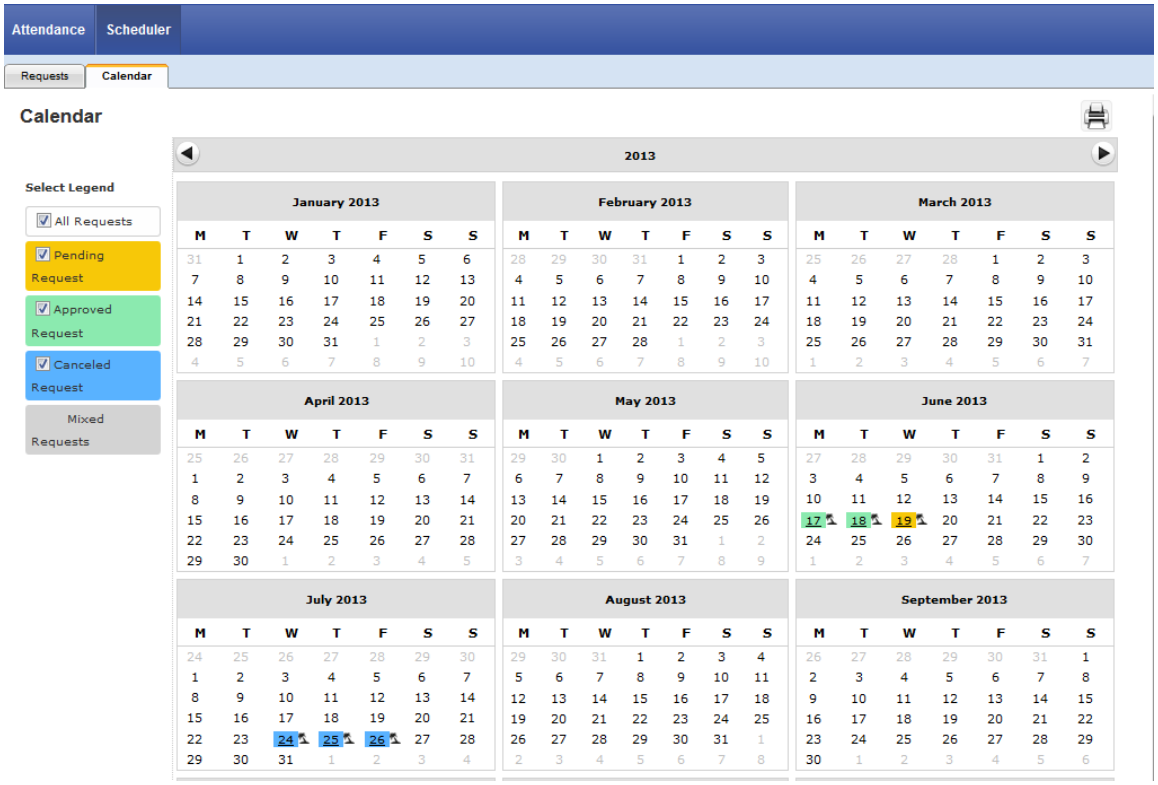


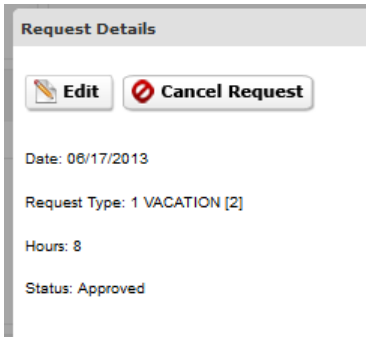
You can click the Request to read it, mark an already read message as unread or delete the message.

Clicking the “Inbox” in the upper right brings you to your messages.

Scheduler>>Calendar

The Calendar gives you a chance to review all your pending, approved and declined time off requests.



Each type of request will be color coded and you can “hide” a request type by unchecking the appropriate box.

Clicking on any request will bring up a dialog box.