

WELCOME TO ULTIPRO!!

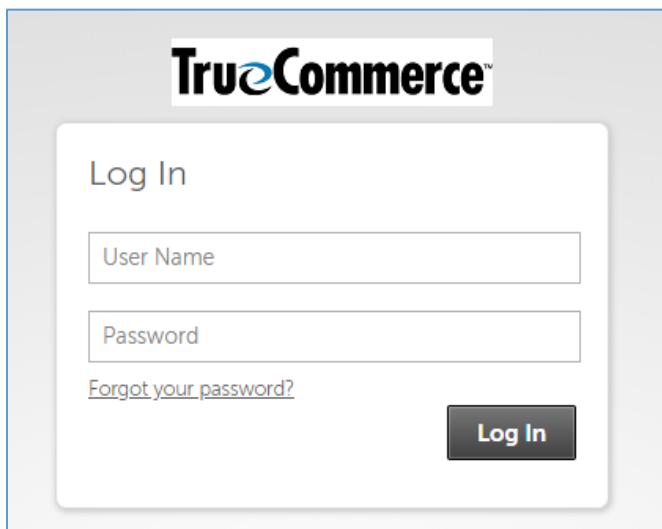
To access the self-service application, you can either type or cut and paste the link below into your web browser: <https://nw12.ultipro.com/> . Alternately, this link will be on the TrueCommerce wiki once we fully roll out to all employees.

UltiPro User Name & Password Screen – save as a favorite on your browser.

When you connect to self-service, the system prompts for your user name and password

User name: Is your email address.

Login “Default” Password: [*employee’s date of birth: – April 9, 1972 would be 04091972*]



The first time you successfully log into self-service, you are required to change your password. Your new personalized password must meet the following requirements:

- Must be a minimum of 8 characters in length.
- Must contain at least 6 letters.
- There must be at least one upper case letter and one lower case letter.
- Must contain at least one number.
- There must be at least one special character (e.g. !@#%&*)

Your personalized password can be any combination of numeric and alpha characters that meets the above requirements. *For example: Abcdef18!*

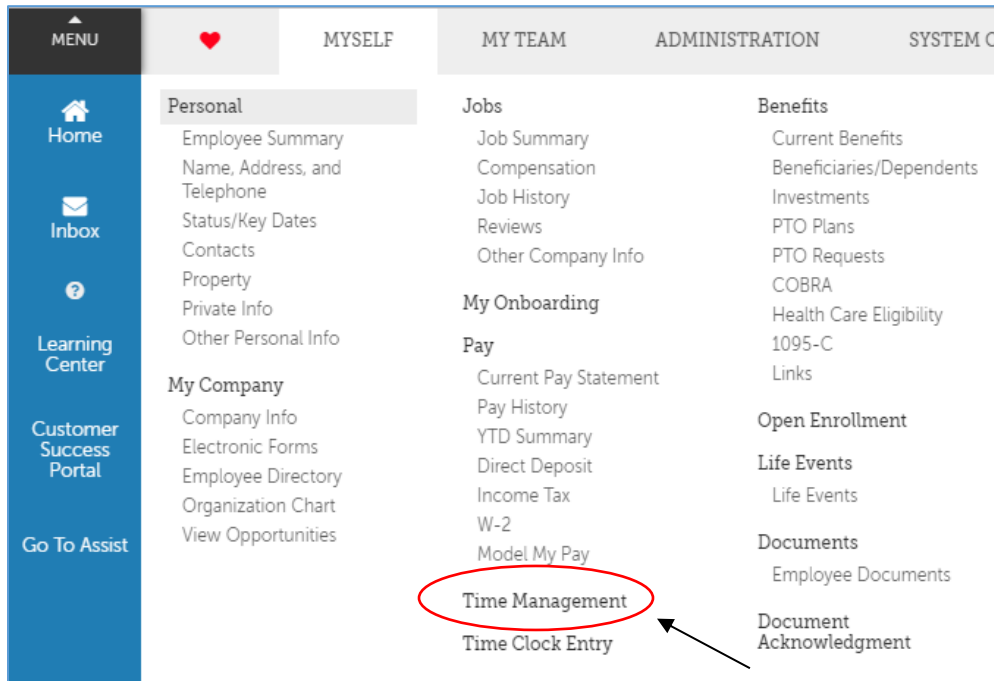
You will also be asked 3 challenge questions prior to setting up your personal password. So, in the event you forget your password if you click the **"Forgot your password?"** icon the system will then prompt you to give the answers to those challenge questions you answered at the set-up of your password. Upon successful entry of the 3 challenge question answers the system will then give you an opportunity to enter a new password. *It is always best to record your user name and passwords in a safe place for future reference.*

After you log into self-service, you will see your dashboard in UltiPro.

Accessing Time Management

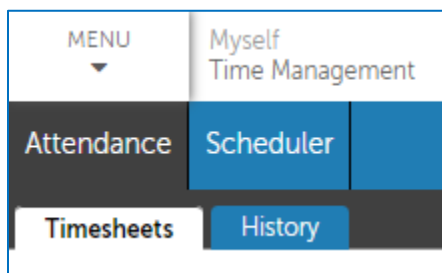
Employees may access UTM to submit requests for time off. In addition, there may be other tabs with information to review such as accrual history, point system history and punch history, depending on your specific access needs.

To access UTM, go to Menu → Myself → Time Management.



Basic Navigation

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



Your tabs may vary, but a general overview is:

- **Attendance → Timesheets** – this is your timesheet and is where you can review and submit your timesheet to your supervisor for approval
 - Even though you are exempt, everyone has a Timesheet in the UltiPro system.
- **Attendance → History** – Review your attendance history on a calendar (annual, monthly, detail, and summary views) including any exceptions and view details and summaries
- **Scheduler → Request** – Where you may place requests for time off
- **Scheduler → Calendar** – Review the status/dates of your requested time off

Requesting Time Off

Going to Scheduler → Requests brings up the time off request area.

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
Displaying 0 to 0 of 0 record(s)						

Requesting time off is fairly straightforward:

1. In the top right corner, click on add.

2. Enter Description and choose the Request Type (PTO, Jury, Bereavement, Unpaid, Volunteer, Military).
 - a. **PTO** – use for vacation, sick, or personal days
 - b. **Jury** – use for jury duty
 - i. If selected for jury duty, documentation will be required. Please see Employee Handbook for more details.
 - c. **Bereavement** – use for viewings and funerals
 - i. Please see Employee Handbook for more details on Bereavement Policy.
 - d. **Unpaid** – PTO time must be used first before unpaid time can be taken
 - i. Please see Employee Handbook policy for more details.
 - e. **Volunteer** – use for 8 hours of volunteer time per year
 - f. **Military** – use to track military absences, time will be unpaid
3. Choose the start (From) and end (To) dates using the calendars (may cross weekends)
4. Add Notes if desired

- Under Notes you can click on Show Advanced Options. This will give you a breakdown of the PTO hours being used each day. It will also show your available hours and remaining hours after the PTO is applied.

Time-Off Requests

Available Balances

PTO	158.00
VOLUNTEER	8.00

New Request

Description:

Type: PTO

From: 02/09/2018

To: 02/12/2018

Total: 16

Notes:

Advanced Options

	Date	Day	Type	Hours	Start	End	Available Hours	Remaining Hours
X	02/09/2018	FRI	PTO	8.00			158	150.00
X	02/12/2018	MON	PTO	8.00			150	142.00

Hide Advanced Options

- UltiPro will automatically assume that you want to take a full day of PTO. If you want to take 4 hours, under the advanced options you just click on hours and edit the hours that you are requesting.

Advanced Options

	Date	Day	Type	Hours	Start	End	Available Hours	Remaining Hours
X	02/09/2018	FRI	PTO	4.00			158	154.00
X	02/12/2018	MON	PTO	8.00			154	146.00

- Click the save icon – your supervisor will receive an email detailing your time off request

Time-Off Requests

Available Balances

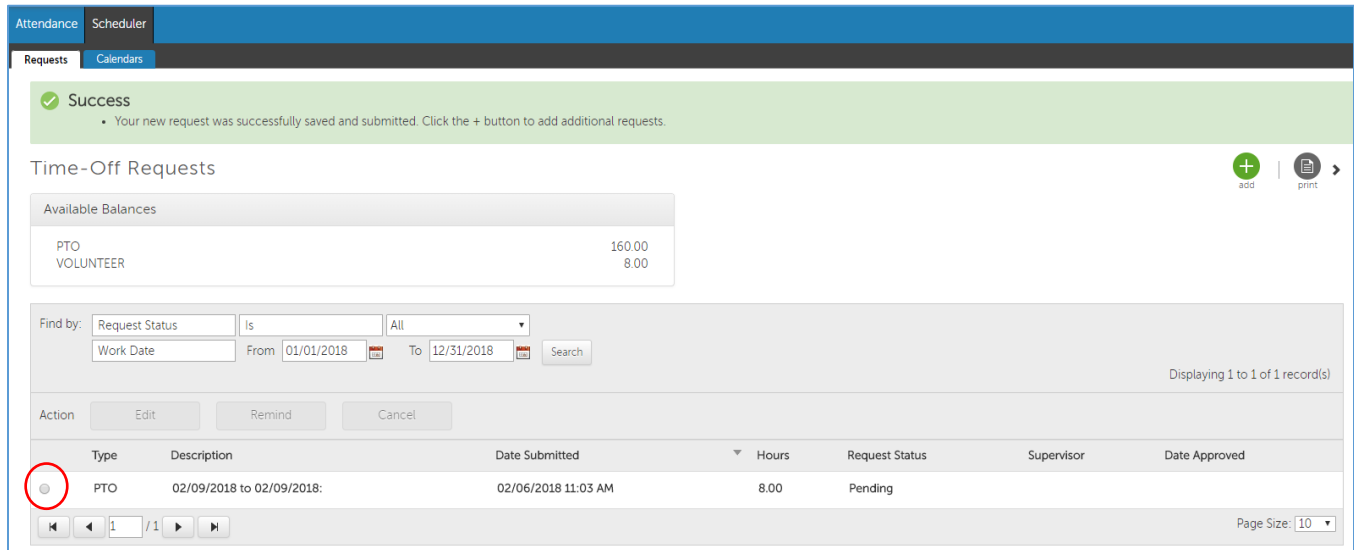
save

Once submitted, you can view your time-off request on the Requests tab.

Submitted requests

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

1. To make a change to the submitted request, click on the radio button next to the request you want to change.



The screenshot shows the 'Submitted requests' interface. At the top, there is a 'Success' message: 'Your new request was successfully saved and submitted. Click the + button to add additional requests.' Below this is the 'Time-Off Requests' section. It includes an 'Available Balances' table:

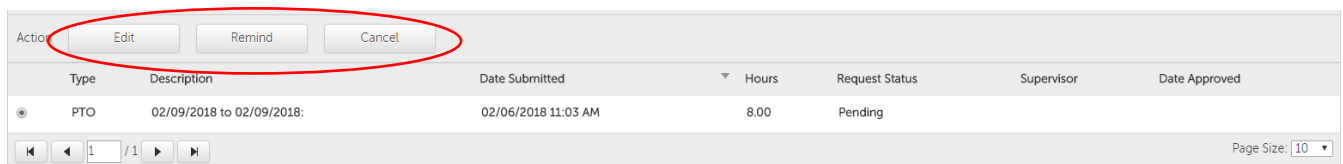
Available Balances	
PTO	160.00
VOLUNTEER	8.00

Below the balances is a search filter section with 'Find by:' dropdowns for 'Request Status' (set to 'All') and 'Work Date' (set to 'From 01/01/2018 To 12/31/2018'). A 'Search' button is present. Below the search is an 'Action' bar with 'Edit', 'Remind', and 'Cancel' buttons. A table of requests is shown below:

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
PTO	02/09/2018 to 02/09/2018:	02/06/2018 11:03 AM	8.00	Pending		

The radio button next to the first request is circled in red. At the bottom right, there is a 'Page Size: 10' dropdown.

2. Once you select it, the greyed out buttons will now become active and allow you to do one of three things:
 - a. **Edit** – use this to make a change to the request. For example, if you want to change the request from 4 days off to 3 days off.
 - b. **Remind** – use this to remind your supervisor if you requested the time off and it's been a few weeks but they have not approved yet.
 - c. **Cancel** – use this to cancel the request if it's no longer needed.



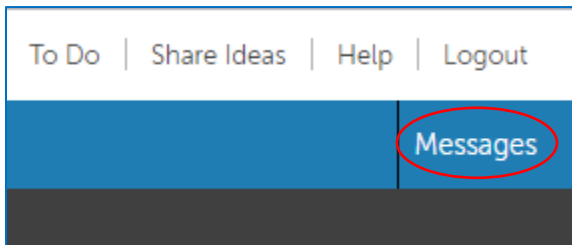
This is a close-up of the 'Action' bar and the first request row from the previous screenshot. The 'Edit', 'Remind', and 'Cancel' buttons are circled in red. The request row shows:

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
PTO	02/09/2018 to 02/09/2018:	02/06/2018 11:03 AM	8.00	Pending		

3. Depending on your requests status, selecting one of the options may go to your supervisor.
 - a. **Pending request** – if cancelling or editing a pending request, the change is automatically updated.
 - b. **Approved request** – if cancelling or editing an approved request, your manager will have to approve of the change or deletion.

Reviewing Approvals/Declines

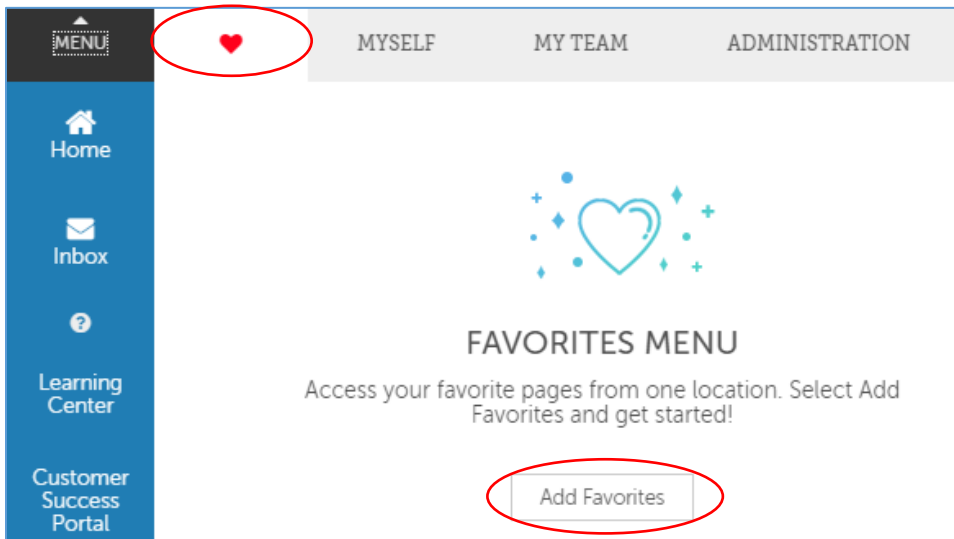
Once your supervisor has approved or declined your time off request, you will receive an email. There will also be a message in the top right the next time you go into Time Management.



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

My Favorites


For frequently visited locations in UltiPro, you can add them to your Favorites Menu which is the heart between Menu and Myself in the top left. To add favorites, click on the Add Favorites Link.



On the Edit Favorites page, you are able to select your favorites. The links will appear based on your role within the UltiPro system. For example, as an employee you will see the Myself Menu. If you are also a supervisor, you will be able to add favorites for My Team as well. You can only select up to 40 links for your Favorites Menu.

Once you have selected the items you want to add to your favorites menu, you can then click on save in the upper right corner.

Edit Favorites



Enable Favorites Menu

Always open to Favorites when using the navigation menu Yes No

Select your favorites (3/40 selected)

Select up to 40 links you would like to see in your favorites menu.

MYSELF (3 selected)

<p>Personal</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employee Summary <input type="checkbox"/> Name, Address, and Telephone <input type="checkbox"/> Status/Key Dates <input type="checkbox"/> Contacts <input type="checkbox"/> Property <input type="checkbox"/> Private Info <input type="checkbox"/> Other Personal Info <p>My Company</p> <ul style="list-style-type: none"> <input type="checkbox"/> Company Info <input type="checkbox"/> Electronic Forms <input type="checkbox"/> Employee Directory <input checked="" type="checkbox"/> Organization Chart <input type="checkbox"/> View Opportunities 	<p>Jobs</p> <ul style="list-style-type: none"> <input type="checkbox"/> Job Summary <input type="checkbox"/> Compensation <input type="checkbox"/> Job History <input type="checkbox"/> Reviews <input type="checkbox"/> Other Company Info <input type="checkbox"/> My Onboarding <p>Pay</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Current Pay Statement <input type="checkbox"/> Pay History <input type="checkbox"/> YTD Summary <input type="checkbox"/> Direct Deposit <input type="checkbox"/> Income Tax <input type="checkbox"/> W-2 <input type="checkbox"/> Model My Pay <input checked="" type="checkbox"/> Time Management <input type="checkbox"/> Time Clock Entry 	<p>Benefits</p> <ul style="list-style-type: none"> <input type="checkbox"/> Current Benefits <input type="checkbox"/> Beneficiaries/Dependents <input type="checkbox"/> Investments <input type="checkbox"/> COBRA <input type="checkbox"/> Health Care Eligibility <input type="checkbox"/> 1095-C <input type="checkbox"/> Links <input type="checkbox"/> Open Enrollment <p>Life Events</p> <ul style="list-style-type: none"> <input type="checkbox"/> Life Events <p>Documents</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employee Documents <input type="checkbox"/> Document Acknowledgment
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After saving, if you go back to the top left to view your favorites menu, you will now see the links you selected. You can edit this menu at any time by clicking on Edit Favorites.

