

UltiPro Task and Role Chart

TASK	EMPLOYEE	TIME KEEPER	EMPLOYEE ADMINISTRATOR	MANAGER
View Personal Information – name, address, phone, email, banking	View their own	View their own	View their own and employees	View their own and their direct reports
Change/Edit Personal Information	change their own	change their own	change their own and employees	change their own
View Payroll Information, Pay Stubs and Pay History	view their own	view their own	View their own and employees	View their own and their direct reports
Add/Change bank account information, allocate pay and add supporting documentation	Add/change their own	Add/change their own	Add/change their own and employees	Add/change their own
View Timesheets/Schedule		own and team members		team members
Request Time Off – Sick, vacation, medical	Request sent to manager	Request sent to manager	Request sent to manager	Request sent to manager
Request and Enter exceptional absences/overtime on behalf of another employee	Request of manager or timekeeper via email	Edit timesheet for self and team members		Edit timesheet for team members
Inbox/Messaging with Manager re time off requests	view their own	view their own	view their own	view their own and team members
View vacation and sick time banked balances	view their own	view their own and team members	view their own and all employees	view their own and team members
View benefits – current plan, beneficiaries, PTO Plans	view their own	view their own	view their own and employees	view their own
Income tax – T4's and Provincial/Federal deduction forms	view their own	view their own	view their own and employees	view their own
Adding hours for time entry employee – Hourly/Casual (Timesheets)		Add hours for self and team		Add hours for team
Adding a secondary role for an employee			Add secondary role for employees	
Adding an employee – New Hire/Rehire and all supporting new hire documents			Add new employees	

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Adding documents to another employees file			Add documents to employees	
Add/change PTO (Paid Time Off) plan selections			Add/change for self and employees	
Changing PTO Balances – sick, vacation, personal, lieu			Change for self and employees	
Changing shifts and shift patterns		For self and team	For self and employees	For team
Benefits and RRSP eligibility			For self and employees	
Viewing employee status – Active, inactive, Contracted etc.	view their own	view their own	View self and employees	view their own and team
Changing employee status – Active, inactive, Contracted etc.			Change self and employees	
Terminate an employee			Enter termination for employees	
Approve/Reject Time Off Requests				For team
Approval of Timesheets				For team
View all booked and requested time off for your team				For team
	ALL CHANGES MUST BE SUBMITTED AND APPROVED BY MANAGER PRIOR TO TAKING EFFECT		SOME CHANGES MUST BE APPROVED BY MANAGER , DHQ, THQ (see <i>Eadmin Authorization Chart</i>)	