

UltiPro Frequently Asked Questions

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General

How do I find and log into UltiPro?

UltiPro is accessed through the MyArmy portal. In an internet browser, go to <http://myarmy.can.salvationarmy.org>. For further guidance, use the job aid “How to find, log into and get around UltiPro” located on this page: <http://salvationist.ca/projectultipro/resources/>

Can I access UltiPro with my phone?

Yes. Go to MyArmy first (<http://myarmy.can.salvationarmy.org/>), then click the UltiPro icon once you are logged in. You can only check pay statements with your phone. For other features you must use a tablet or computer.

Which browsers can I use with UltiPro?

UltiPro works reliably with:

- Internet Explorer 11 and higher
- Chrome
- Firefox
- Safari 4.0

If you are using a different browser, UltiPro may experience difficulty. UltiPro will NOT work with the browser built into Lotus Notes. UltiPro has not been tested with Microsoft Edge yet.

I can't get to Time and Attendance, or When I click “Time and Attendance” in the Menu or access “Business Intelligence” reports or try to “Print”, nothing happens. (Pop-up Blockers)

Clicking Time and Attendance, BI Reports and Print will launch a new tab or browser session. When this does not work it is usually being prevented by a pop-up blocker. First, make sure you are using one of the approved browsers (see previous FAQ item). Second, turn off all pop-up blockers, then try clicking it again. For instructions, refer to the job aid “Turning Off Pop-Up Blockers” here: <http://salvationist.ca/projectultipro/resources/>

How do I correct a problem with my profile?

If you see a problem with your profile, contact the Service Desk. They will document the requested change and forward it to Employee Relations or Payroll as needed.

How do I get help with UltiPro? Is there training?

Yes! Look at the resources page for helpful job aids and training material: <http://salvationist.ca/projectultipro/resources/>

When will I get access to UltiPro? When does my unit/department go live with UltiPro?

Please refer to the project timeline to see when your group is going live with UltiPro: <http://salvationist.ca/projectultipro/news-timeline/>

Is UltiPro available in French?

Yes. Normally it will detect your preferred language and present the correct version. If not, language can be changed through the Preferences option available by clicking on your name in the top right corner of the screen.



When using the Time and Attendance functions, which are in a different interface, you must request that the language be changed to French by sending a note to the Service Desk.

Does the calendar display provincial statutory holidays based on your location?

Yes.

How is Daylight Savings Time handled by the system?

This will be built into the system where required. UltiPro will remove an hour in Spring and add an hour in the fall.

When does UltiPro automatically 'time you out'?

TBD

I need help with UltiPro.

If you've looked at these questions and answers, reviewed the resources page, and still need help, please contact the Service Desk: Helpdesk@can.salvationarmy.org 416-422-6300

My Pay

Will I continue to get a paper pay stub?

No. UltiPro eliminates the need to send out cheques and pay statements (there are a few exceptions in BC). Pay statements (stubs) are completely digital with UltiPro.

How do I know when a new pay statement is available?

Log into UltiPro and check the Pay tab (Menu > Current Pay Statement). UltiPro does not yet send emails to alert people when there is a new statement.

Can I email the pay statement to myself?

Yes. You can click download for each pay statement, save it, then email the PDF version to yourself.

How do I print my pay statements?

When on the pay statement screen, click the Print button in the top right corner of the pay statement. A new window will open with a 'printable format'. If the Print menu does not appear, press the CTRL key and hold it while you press the letter P once to launch it.

Where is my pay history?

In UltiPro, pay history goes back to January, 2017. All history prior to 2017 is contained within a different system.

How do we get our tax/T4 slips?

You can download T4 slips from UltiPro beginning in 2018 (for the 2017 tax year).

Can I import UltiPro information into tax packages like TurboTax?

No.

If I enter incorrect bank information for direct deposit, is that a problem?

Remember that to change your direct deposit information you must BOTH enter the information in UltiPro and also attach a copy of your void cheque or bank letter/slip with account information (refer to the [Job Aid: How to view and change your pay information](#)). Payroll will double-check your entries against your submitted void cheque or deposit slip to ensure there are no errors.

My Benefits

Do I change/manage my benefits through UltiPro?

No. There is no change from how benefits are selected and managed today. If you have questions or require changes to your benefits, please contact Employee Relations or your local Division Director of Employee Relations.

How do I add or change my beneficiaries and dependents?

Use your existing process for benefits administration. This is not managed through UltiPro at this time. If you're not sure how, please contact Employee Relations or your local Divisional Director of Employee Relations.

How are Benefits in Arrears handled?

Benefits in arrears are handled by the payroll group. Currently, payroll receive cheques from the employee for each month's benefit costs. The benefits group communicates this to employees before they go on leave. The cheques are currently inputted as a negative deduction (which functions like an earning) and then the amount is allocated to the deductions which they are being applied to result in a net pay of zero. The positive amounts in the actual deductions end up clearing arrears in UltiPro.

Time Off and Overtime (Vacation, Sick, Medical, Overtime, In Lieu)

My time off information is not correct.

All time available to you (sick time, medical leave, vacation) is stated in hours rather than days. If you believe the time allocated to you is incorrect, first check with your manager. If you agree there is a problem and the manager cannot change it, submit a request to the Help Desk. Explain what is incorrect, why, and who your manager is. Employee Relations will review the request, follow up with the manager to verify and then have the amount updated by the HR support team. You will be notified when the work is completed.

How is 'time in lieu' managed?

Time in lieu, which has been mutually agreed to and approved by an employee and manager, is recorded by timekeepers or managers by adjusting the employee's timesheet to indicate that extra time has been worked, is not to be paid out and instead added to a 'bank' for later use. The decision to pay out or bank is an all-or-none decision for all overtime incurred on a particular day. You can, however, make different assignments of overtime to pay out or bank on different days.

Rules for recording overtime and time in lieu vary. If you are a member of a union, the terms of the collective bargaining agreement take precedence and determine how time is recorded and paid. Managers are not entitled to overtime, lieu time, statutory overtime etc. under the Employment Standards Act (ESA). These rules are already set up in UltiPro.

Extra hours incur vacation pay if they are paid out rather than banked (as per ESA), but will not affect benefits which are independent of hours worked for non-union staff.

Lieu time does not apply to officers.

For details on how timekeepers record time in lieu, refer to the Job Aid: How to Enter Employee Overtime Hours located on our resources page: <http://salvationist.ca/projectultiapro/resources/>.

Can Lieu time be set to expire according to rules?

Yes, if the project team is made aware of those rules.

Can employees see a team calendar to avoid conflicts when booking vacation time?

UltiPro only allows you to see your own information and that of people that report to you. Therefore, it is not possible to see other team members' vacation bookings unless they report to you. Managers do have a view which shows all time booked or requested off.

How far in advance can an employee request time off?

As early as you want. The system will warn you about requesting more vacation time than you would normally receive that year.

How do I record sick time or other unplanned time off?

Sick time, jury duty or bereavement leave must be entered by your manager or a designated timekeeper. For instructions, refer to the Job Aid: How to Enter Employee Overtime Hours located on our resources page: <http://salvationist.ca/projectultipro/resources/>.

Does UltiPro know when to increase vacation allotments according to years of service (or any other type of rule)?

Yes, the rules are programmed into the system.

How do I request unpaid time off (if I am out of sick or vacation time)?

When selecting the type of time off you want, select the unpaid options available to you such as "Vac-U" and "Unpaid Leave".

Can a notification be turned on to notify an employee when a timekeeper books time off for them?

No.

Officers

I'm an officer. Will I see something different in UltiPro?

You will see the same UltiPro screens, however, some screens are not applicable to you. UltiPro contains only what is needed to pay an officer. Information such as appointment history, service dates, and education is stored in the Officer Management Suite - Next (OMS). Functions like requesting time off, viewing time allowances for vacation and sickness, hours worked and accruals do not apply to you. As such, some screens may not show you any data. To request vacation/furlough, please follow your existing procedures.

If you are an officer who manages people, you will be able to review and approve time off requests for your employees.

My Compensation page is empty.

If you are an officer, this will remain blank as officer allowances are imported into UltiPro from another application. We are considering creation of an officer-specific page that provides this detail. Your pay stub will provide details regarding your bi-weekly rate of pay. If you are not an officer, please report the issue to the Service Desk.

I'm a retired officer. Do I still use UltiPro?

As of June 5, if you work as a Corps Officer or Executive Director, you will use UltiPro the same as active officers do, to review your pay information. You will NOT use it to request time off (vacation). Follow the furlough process.

If you are working in a post-retirement support position (administrative assistants, receptionists, chaplains, various positions related to housekeeping, etc.), you are set up as an employee rather than an officer for purposes of payroll, benefits and vacation. Therefore, you will use UltiPro to review your pay statement, pay history, and to request time off (vacation). This comes into effect:

- June 5 for those in Newfoundland and Prairies
- November for those in the BC, AB, QC, ON, Maritimes divisions

Pension payments will be unchanged from how they are handled today. They will not be paid through UltiPro.

Timekeeper Functions

Can Managers and Timekeepers adjust and approve their own timesheets?

No. Timekeepers and Managers can edit their own timesheets, but the changes must be approved by the next person above in the hierarchy. They cannot approve their own changes.

When a manager requests time off, does the request appear on the calendar view for his/her team?

No, since the manager is not considered to be on his own team.

Whose timesheets can timekeepers view and edit?

The timekeeper can see the employees of the manager to whom they report. Additional people or groups can be added to the timekeeper's view upon request via the Help Desk.

I can't modify my employee's timesheet.

Assuming you have the authority to adjust or enter employee time, timesheets can only be modified for one previous pay period. If you are trying to change time prior to that, you must submit a request to payroll:

THQ_Payroll@can.salvationarmy.org

If you cannot access or edit the previous time period, it could be that the timesheet is locked while payroll is processing it, which normally runs Mondays, and sometimes into Tuesday during busy periods. Try again the next day.

If neither of the above applies, please notify the Service Desk.

I have been asked to assume Timekeeper duties. How do I do that?

Ask your manager to submit a request to the Service Desk stating the UltiPro role required for you (Timekeeper) and which employees need to be visible for you to manage their time.

What is the cutoff date for timesheet approval?

Timesheets must be approved prior to the payroll cutoff which is:

- Noon EST on Monday of the pay week for 24/7 facilities
- 10:00 AM EST on Monday of the pay week for all other ministry units

Is a replacement for our existing time clock required? If so, when?

Replacement time clocks are available for those Ministry Units that use a time clock today.

Phase 3 ministry units will be contacted in the summer with information about the clocks available for UltiPro - models, pricing etc. We will need a decision from ministry units about their clock selection in July. Clock order forms will be completed at that time. Clocks will be delivered for on-site testing a few weeks before we go live in November.

If your Ministry Unit is interested in putting a time clock in place, please contact the UltiPro team, however, we will likely not be integrating additional clocks until 2018 so we can ensure our Phase 2 and 3 employees are transitioned correctly.

For Scheduler, will employees be able to view the work schedule at least 28 days in advance?

Yes. The schedules will be displayed on the first page in Time and Attendance. Users can navigate to future dates as needed.

Can UTA handle multiple approvals for time if needed? (i.e., 2 people have to approve)

Not at this time.

Can time be approved in advance?

Not unless all hourly employees requiring approval have submitted all of their time for the week. Any time entered after approval will not be approved and will not be paid if unapproved prior to the payroll run. If you will be away during approval and do not have a timekeeper, request the assignment of a delegate to do approvals in your absence by sending a note to the Help Desk.

If employees are using a clock, is there still a shift pattern entered into UTA?

No.

What is the colour coding on the approval calendar in Time and Attendance?

Blue is pending.

Green is approved.

Grey is denied.

Can UltiPro bank lieu hours at time and half if applicable?

Yes. If they worked over their scheduled hours it will be coded as OTS (Overtime Standard). If they work over the provincial overtime limit it will be coded as OT1.5

Can UltiPro evaluate overtime over a two-week period?

Not currently. This is a possible customization. For now, overtime is determined on a weekly basis.

What is the process for changing a shift pattern?

Please submit a service request to the UltiPro team through the Help Desk.

For Ministry Units using a timeclock, does UltiPro contain a shift pattern for each person or just an expected number of hours?

It depends. If the employee has varying schedules with no set pattern then a shift pattern is not used. The approved clock in/out times drive payroll.

Does UltiPro accrue vacation time throughout the year?

For new employees in their first year, UltiPro will accrue 1 day of vacation per month. For all subsequent years, all vacation time is available at the start of the year.

Does UTA automatically increase vacation time according to seniority rules?

Yes, if an employee moves up a level or step based on years of seniority, vacation balance will be increased accordingly.

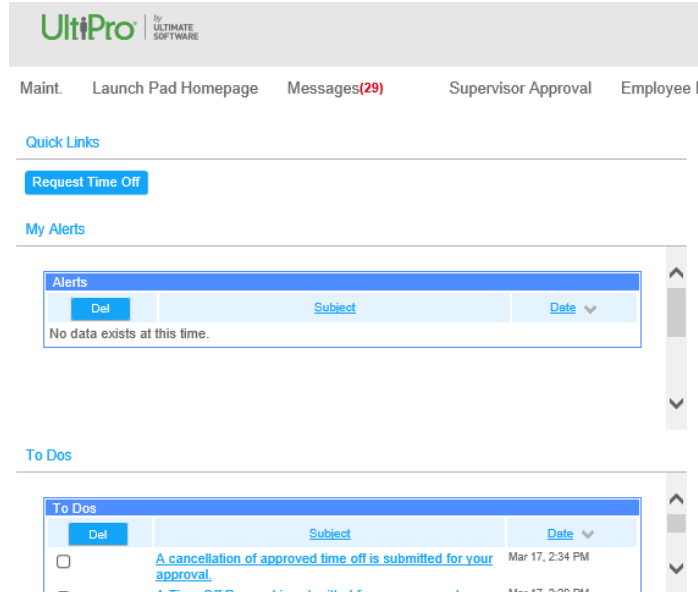
Manager Functions (not including Timekeeper Functions)

Where do I find items needing my approval?

There are two inboxes to check. When you first log into UltiPro, there is an inbox in the menu as shown, which includes requests to approve new hire information and employee changes if you manage employees.



When you click on Time and Attendance, there is a second Inbox to check, labelled **Messages**. Pending tasks are also listed under “To Dos” further down the screen, as shown. Click **Messages** to view all items in your inbox.



If an employee is ‘auto paid’ do I still need to approve his or her timesheet each week?

Any change to the employee’s timesheet requires authorization by a manager. This includes all planned and unplanned time off. If you approved a time off request (e.g., vacation), you must also authorize the employee’s timesheet during the pay period when the vacation occurs. That means you may be approving time off in May, then authorizing the timesheet when the vacation is taken in August.

If there is no change to the timesheet, no authorization is required for an auto paid employee.

Who approves terminations?

Terminations are initiated in UltiPro by the Ministry Unit.

DHQ Employee Relations will handle terminations for DHQ staff. They are responsible for final approval of involuntary terminations and sending the appropriate details to THQ Benefits and THQ Payroll.

THQ ER will handle terminations for THQ staff.

Special cases involving THQ ER and Legal will be handled outside of UltiPro except for the statutory payments. Severance for involuntary terminations depends on a number of factors (age, length of service, reason etc.) and cannot be reduced to a set of rules. As a result, severance packages will be developed outside of UltiPro.

A. Voluntary Termination Steps:

1. Employee Admin at MU enters data into termination screen
2. Notification goes to MU Manager to approve
3. Manager at MU approves termination
4. Notification of termination to: DHQ ER/THQ Benefits/THQ Payroll

B. Involuntary Termination Steps:

1. Employee Admin enters data into termination screen
2. Notification goes to Manager at MU to approve
3. Manager at MU approves
4. Notification to DHQ ER to approve
5. DHQ ER arranges severance package outside of UltiPro as per existing practice
6. DHQ ER approves termination in UltiPro
7. DHQ ER advises THQ Benefits and THQ Payroll of termination and severance package. This will be done outside UltiPro for the time being, until we develop a way for the system to handle it in a confidential manner.

I received notification that I have unauthorized timesheets. What does that mean?

It means either that you have an employee who is not auto-paid and worked hours which require approval, or that there was a change to the timesheet for an auto-paid employee which must be approved (e.g., a sick day).

Does UltiPro use the new Department Numbers in Agresso?

Yes, UltiPro uses the Agresso chart of accounts (RESPC, departments, and account numbers) instead of the existing account numbers in Cyborg, which was built for legacy accounting systems (Shelby and Masterpiece).

How do we request a change in shift/work pattern?

Submit a request to the Help Desk explaining what needs to be changed in UltiPro. The project team will take care of it.

I have staff who are 'low literacy', 'low computer skills', or have a disability. What accommodations have been made for this?

We understand that some people have significant limitations for using computers. If an employee is unable to access a computer, managers at the ministry unit have access to print pay statements and update profiles. Timekeepers can enter time or request time off on behalf of others.

Will casual and seasonal (kettles, camp) workers be expected to use UltiPro? What about those without computer access?

All employees, whether casual or seasonal, will receive access to UltiPro to collect pay statements. If some do not have computer access, options include:

1. Manager can access and print a pay statement for them
2. Ministry Unit can provide access to a computer for them to log in and review
3. Employee can access a computer anywhere to log in and review (family member, library, etc.)

Some will find it sufficient just to see that pay went into their account and never access the system.

Can UltiPro distribute salary costs to multiple departments?

UltiPro can allocate cost by % if it's set up as fixed allocation that does not vary based on hrs worked.

For employees whose hours and allocations vary, Ministry Units will have to enter and adjust time and respective org levels (cost centres) in Time and Attendance.

Will UltiPro prompt managers to determine if a pay increase is required?

Not currently. We are working to automate this process for union employees so when they reach a specific number of hours they will be moved to the next step.

Administration

If a person adds a document to an employee's file, can the employee see it?

Only the Employee Administrator can add a document to an employee's file (managers cannot). There is a selection box on the document screen to enable a document to be viewable by the employee. If the administrator clicks it, the employee can see it, but cannot delete it.

When completing fields for a new employee, is it possible to set the termination date if they are seasonal/temporary?

Not during the hiring process. Once the employee is hired (approved) the employee admin can go into the termination page and enter a future termination date.

How soon after the new hire entry is approved does the manager receive employee number and email address?

Employee number is created as soon as approval is made and is viewable in UltiPro. Email address is typically generated within a week.

Is there a suggested format for filenames for uploaded documents?

Load them one at a time with each named according to what it is: Offer Letter, Tax Information, Bank Information, etc. Do not scan and load them as one large file.

For new hires, do we enter tax information into UP or do we scan the forms we use today and upload them?

Scan the forms and upload them to UltiPro. Payroll will enter the tax information.

Who has access to the Record of Employment (ROE)?

Only payroll will create ROEs. Employee Administrators should NOT select the box for "Run ROE". Once created, the ROE will be uploaded to the employee record where the Employee Administrator can view it.

Can key dates in UltiPro prompt pay reviews?

Potentially, but we are not using them in this way yet. The salary review date does drive step increases for union employees.

Can UltiPro support multiple approvers for a new hire or other workflows?

Yes, if required.

If someone forgets to attach a void cheque or other document when changing direct deposit, what happens?

Payroll will check and follow up to remind them.

Reports

If I send/transfer a report to someone else from UltiPro, is a copy placed in my Lotus Notes Sent folder?

No. Therefore, you need not be concerned with reports becoming accessible to other people with delegated access to your mailbox.

If I send/transfer a report to someone else from UltiPro, does it only send data that the other person is entitled to see?

No. The report is sent 'as is'. If you are higher in the organizational hierarchy than the receiver, that person can see all the same information in the report that you can, regardless of their role. Be cautious when forwarding reports.

Will reports include data/history prior to 2017?

No. For data prior to 2017, a special request must be made to Payroll or Employee Relations.

Do you have a list of reports which explains what they are for?

Yes, Standard Reports are listed and defined here:

http://documentation.ultimatesoftware.com/onlineguides/CanadaStdReportsGuideNET/00_NETStandardReportsGuideCN.htm

This is a general list and some of these reports are not applicable to The Salvation Army and may not be available in UltiPro.