UltiPro Job Aid – Paid Leave Time/Call Time Management

Supervisors and their designees log into UltiPro to review, modify, and approve Paid Leave Time (PLT)/Call Time for direct reports.

Access Time-Off Request Management

Time-off request approvers receive an e-mail in their NCHC mailbox when a direct report submits, cancels, or modifies a time off request.

1. Double-click to open time off request notification e-mail.

!	② □ 0 From	Subject	Received	Siz	e Categories	17	
	A _ Date: Today					l	
	messages-noreply@ultipro.com	Request From: 000999901-TC2LD [Kyle Chandler Test]	Sun 11/10/2	01 24	КВ	Ÿ	

There are TWO Time-Off Approval options from within the e-mail notification:

• Click the first link, login to UltiPro, and access Time Management menu to process the request.

OR

• Click the **second link** to approve request(s) without logging into UltiPro.

From: To: Cc:	messages-noreply@ultipro.com Todd Shnowske	
Subject:	Request From: 000999901-TC2LD [Kyle Chandler Test]	
<u>https:</u> Reque 11/29/ Notes	ive received a request for time off from one of your employees. Please follow the link below to login to UltiPro and then access the Time Management menu //ew33.ultipro.com/Login.aspx st For PLT from 000999901-TC2LD [Kyle Chandler Test]PLT Request 2019: 8.00 hours Link 1 ay PLT. Thank you.	to process the request.
	click the following link to approve all request(s) without logging into the system. //mnw14.ultipro.com/nova4000/approveall.aspx?cid=4C500364-4DB2-4E80-9FD0-D510896582FE&REQTOKEN=3558DE6E-B30F-48A9-9BEB-9B980ED13969	Link 2

Use Link 1 Option – Manage Time-Off Requests

- 1. When UltiPro Log In displays:
 - a. In *User Name*, type <u>your</u> North Central Health Care **(NCHC) e-mail address** (e.g. <u>name@norcen.org</u>).
 - b. In *Password*, type <u>your</u> password.
- 2. Click Log In. UltiPro Dashboard displays.

3. UltiPro Dashboard displays, click MENU.

Note: UltiPro menu options are security driven and individuals may configure dashboards by preference; **your UltiPro view may be different from screen shots in this document and other users**.

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Todd Shnowske Project Manager	To Do There are no to dos.	Inbox	Recruiting Gateway	UltiPro Learning
			Time Clock Entry	Pay History

- 4. Click MY TEAM tab.
- 5. Click Time Management.



UltiPro Time Management page opens.



6. Click **Scheduler** category.

7. Click **Requests**.

MENU	My Team Time Mana	agement				North Central Health Care						
Attendance	Schedule	r Employees	Reports	Preferences	EWS Setup	Users Setup	Tools	Company Setup	Rules Setu			
Template Sch		Schedules Schedules	iules R	ecap Reque	sts Calenc	lars						
Active	Recap Requests		1	Template Schedules								
Supervisor: Employee:	Supervisor: Calendars Employee: Requests Search				ndo 🔍 Audit	•						
All All (Template Fil	(Home Group Filter - Off)			🦉 si	IPERVISOR, TEST	- 00000000099998	🕒 Go to	Timesheet 🚨 Go t	o Employee			
NAME	ME ID ^A		All	► Locatio	n: 100	▶ Job : 100		Pay Policy: 2				
SUPERVISOR	TEST 00	000000099998										

Manage Time-Off Requests page displays. View time off TO DO items (e.g. All, New, Modify Pending, and Cancel Pending). Approvers may also take action on time off requests (e.g. Approve, Deny, and Remove).

Take Action on a Time-Off Request

- 1. Within **Time-Off Requests** page, click *check box* next to time-off entry on which to take action.
- 2. Select Action:

Attendance	Scheduler	Employees	Reports	Preferences	EWS Setup	Users Setup	Tools	Company	Setup	Rules Setup	NEWS	Payroll	HW Devices	Das
Template Sch	edules Fre	e Form Sche	dules Re	cap Reque	sts Calend	ars								
Manag	ge Time	e-Off F	Reques	ts									Prin	
	TO DO)	5 All		5 New	O Modify Pending	(Cancel) Pending						
Find by: Result Su	Requested D Request State mmary: 3 Emp	us	ls	MM/DD/YYYY nding, 0 Decline			• • -					Displaying 1	to 5 of 5 recor	d(s)
Action	Approve		Deny	Remo	ove	Email Calend	ar Appoint	ment						
Name	ie	Туре	Hours Requested	Hours Available	Alerts	Comments	Date Subr	nitted 💌	Date Re	equested	Supervisor	Statu	Seniority s Date	′
✓ ► K Test	yle Chandler	PLT	8.00		4	2	11/10/201 PM	9 04:12		1/29/2019 1/29/2019	Todd Shnowske	Pend	ding 01/01/2	019

• Select **Approve** to approve time off submission. *Posting to Timesheets* message displays. Click **Save**. *Manage Time-Off Requests* page displays with approved request removed.

Posting to Timesheets	Save Cancel
The system will now automatically post the approved time-off requests to the timesheet.	

- Select **Deny** to mark the time off submission as denied. *Manage Time-Off Requests* page displays with denied submission removed.
- Select **Remove** to remove an entry. *Manage Time-Off Requests* page displays with submission removed.

Tip: Apply various *Filter* options to filter time-off requests by date range, request status, request type, etc.

TO DO		3 All	3 New	,	O Modify Pendi	O Cancel Pending	9			
Request Status ar Filters) Ilt Summary: 5 Emplo	;	ls	/01/2019	Cancele		endar Appointment	arch	Dis	playing 1 to 9	of 9 record(s)
Name	Туре	Hours Requested	Hours Available	Alerts	Comments	Date Submitted	Date Requested	Supervisor	Status	Seniority Date
Kyle Chandler Test	PLT	8.00	-8.00	A	2	11/10/2019 06:34 PM	From: 11/29/2019 To: 11/29/2019	Todd Shnowske	Approved	01/01/2019
Kyle Chandler Test	PLT	0.00	-8.00	A	2	11/10/2019 04:12 PM	From: 11/29/2019 To: 11/29/2019	Todd Shnowske	Declined	01/01/2019

Use Link 2 Option – Manage Time Off Requests

1. After clicking second link in time-off request notification e-mail, an UltiPro Approval page displays:

UltiPro Ultimate SOFTWARE	Sunday, 11/10/2019 7:17:23 PM				
You are approving the following requests for Employee 000999901-TC2LD [T	fest, Kyle Chandler]				
1. Request for 8.00 hours of 14[PLT] on 11/27/2019					
For any partial approvals, please log in to the system directly.					
Approve Cancel					

- 2. Review time off request details (e.g. employee, hours, date):
 - If details are *incorrect*, click **Cancel**. Log into UltiPro Time Management and manage time off request. *Close internet browser*.

	Sunday, 11/10/2019 7:17:20 PM
Please close the browser.	

• If details are correct, click Approve. Click OK. Close internet browser.

UltiPro [®] Ultimate SOFTWARE	Sunday, 11/10/2019 7:40:40 PM					
You have successfully approved the requests for 000999901-TC2LD[Test, Kyle Chandler] on 11/27/2019						
1. Request for 8.00 hours of 14[PLT] on 11/27/2019						
Click OK to exit						
UltiPro by ULTIMATE SOFTWARE	Sunday, 11/10/2019 7:40:53 PM					

Log Out of UltiPro

1. Click Logout.

- ロ × [Search ター 企 公 磁 ()	North Central Health Care Perior contend. Oxforme forcest
Todd Shnowske ▼ To Do Share Ideas Help Logout	Your session has ended. You may now close this window.
Find	Return To Log In

2. Click **X** in upper right corner of window to close web browser.

Get Help

- View Help Documentation
 - » Available from Help link when signed into UltiPro
- View Quick Tours and Tips
 - » Available in Quick Tours and Tips links section of application tab set when signed into UltiPro
- Send e-mail to NCHC Human Resources
 - » <u>HResources@norcen.org</u>
- Speak with Human Resources Staff
 - » 715-848-4419 or ext. 4419