Log In

UltiPro Job Aid – Timesheet Management

Supervisors and their designees log into UltiPro to review, modify/correct, and approve timesheets for direct reports.

Log In to UltiPro

Note: IF this is your first time logging into UltiPro, please follow steps in <u>UltiPro Login Job Aid</u> first. <u>O:\Information Systems Libraries\UltiPro\NCHC UltiProLogIn.pdf</u>

Log In

name@norcen.org

Forgot your password?

.....

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

Access Time Management

1. 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		Inbox	ŃŔħ	•	1
	There are no to dos.			Recruiting Gateway	UltiPro Learnin	ig
				Time Clock Entry	Pay Histo	pry



2. Click **MY TEAM** tab.

3. Click **Time Management**.

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MENU	MYSELF	MY TEAM	ADMINISTRATION	SYSTEM CONFIGURATION
A Home	Manager Guide My Employees			
	My Organization View			
Inbox	Time Management			
0	Compensation Summary			
Learning Center	Compensation Management Salary Planning			

UltiPro Time Management page opens.

4. Click **Summary** tab.

MENU	My Team Time Manage	ement					North (Central Health Care entered. Outcome focused.
Attendance	Scheduler	Employees	Reports	Preferences	EWS Set	up Users S	etup Tools	Company S
Overview	Summary	Timesheets	Accrua	als History	In Out	Board Po	osting Events	
Overview		-						
Pay Cycle:			Date Sele	ction:	From:	To:		
Bi Weekly		~	Current Pa	ay Period 💊	11/03/20	19 11/16/2	2019 Group By	🔒 Pay Group
Filtered by initia	ted date range is	between 11/03/201	9 and 11/16/20	019 [Clear Filters]				
			4	ly Employees			Tir	nesheet Status
	Pay Group		Employees	s Pa	Period	OPEN	SUBMIT	APPROV
[100] DEFAUL	T FACILITY		1		1	0	0	0
[NCHCBW] Bi-	Weekly		747		747	408	1	0
Totals			748		748	408	1	0

Summary tab opens to display a list of the supervisor/designee's direct reports.



5. To drill down to an individual employee's timesheet, click employee's Name.

MENU	My Team Time Manage	ement					North Ce Person cent	entral Health Care
Attendance	Scheduler	Employees	Reports	Reports Preferences I		Users Setup	Tools	Company Setup R
Overview	Summary	Timesheets	Accrua	ls History	In Out Boar	d Posting	Events	
Summary								
Pay Cycle:			Date Sel	ection:	From:	To:		
Bi Weekly		~	Current F	ay Period 🗸 🗸	11/03/2019	11/16/2019	Last updat	ted: Tuesday, 11/05/20
Filtered by init	iated date range	is between 11/03/2	019 and 11/16/	2019 [Clear Filters]				
Group / Filte	er By: All		✓ E	mployee Search	~			Cancel Filter
Supervisor /	Filter By:							
Status Filter	: All		✓	Active Only				
Unopened Ti Opened Time	imesheets: esheets:	0 748 Save	Approve this	s Page				
	ID≜		NAME	E	Missed	Punch	Sch.Hr	Reg.Hr
0009	999901-TC2LD	Test, Ky	le Chandler		C)	0.0	0 9.25
0009	999902-TC2LD	Test, Eri	n Degeneres		c	0		0 0.00
1								

Timesheets tab opens to display the selected employee's timesheet.

- 6. To navigate employee timesheets:
 - Click **Previous Employee** or **Next Employee** buttons to navigate through employee timesheets in succession.

Attendance Scheduler Employees Repo	orts Preferences	EWS Setup	Users Setup	Tools	Company Setup	Rules Setup	NEWS	Payroll HW	/ Devices	Dashboard	Acc	Ness
Overview Summary Timesheets A	Accruals History	In Out Board	d Posting	Events								
✓ Active 《 ,	🔺 Test, Kyle	chandler		View Profile	📆 View Schedu	lle						
Supervisor: Employee: Search	Location : Wausa	au Job: CNA	Pay Policy: D	EFAULT PAY	POLICY Shift Nur	mber: DEFAULT	SHIFT Pay	Category: Full 1	Time Holio	day Rule: 8 HC	OUR HOLI	IDAY
Pay Cycle: Bi Weekly	Date Selecti Current Pay	on: / Period	× ×	»								
All Timesheets Count: 748	Timesheet	t for Nover	mber 03, 2	2019 to N	November 16	5, 2019			St Attesta	atus: OPEN Ition: Not Y	l Q et Subi	mitted
Previous Employee Next Employee NAME ID ^A	📏 Summa	ary										
	🗸 Timesl	heet Detail										
	🗎 Save 👍 🖊	Add 🔀 Delete	© Cancel	* Columns		Insert/Repost	🛛 🖉 Multi I	Edit 🖌 Appro	ve 🔒 Prir	nt		
		Date	Pa	ayCode	In	In Rnd	Οι	it Out Ri	nd	Reg	OT	HOLW
		Mon 11/04/2019	0W]0	RK HOURS]	06:58AM	7:00AM	* 04:02	7PM 4:15P	M *	9.25	0.00	0.0
Test, Kyle Chandler 000999901-TC2LD 4												





- Search for a specific employee's timesheet, *type employee's name* or *employee ID* in Employee field.
 - Click Search.
 - The employee's timesheet displays and the employee's name is highlighted in the list (e.g. Test, Kyle Chandler).

Note: If Employee Search finds multiple matches (e.g. Test), use arrows to locate correct employee's timesheet.

Supervisor:		
Employee:	Test	Search
4 found 🗨	1 🕞 🗆 Filter	
Pay Cycle:		
Bi Weekly	~	

MENU T	My Team Time Manage	ement							
Attendance	Scheduler	Employees	Reports	Prefere	ences [EWS Setup	Users Set	up -	To
Overview	Summary	Timesheets	Accrua	als Hi	istory	In Out Boa	rd Post	ing	E
Active			< / Te	est, Kyl	le cha	ndler	2	L View	ı P
Supervisor:			Loc	ation : Wa	ausau	Job : CNA	Pav Policy:	DEFAU	П
Employee:	chandler	Searc	h a				,		
1 found	1 🕑 🗆 F	ilter	~						
Pay Cycle:				Date Sele	ection:	1			
Bi Weekly	\sim		**	Current	Pay Perio	ba	~	"	
All	V (No Gr	roup Filter)	Ті	meshe	et for	Novem	ber 03	2019)
All Timeshee	ts 🗸 Count	: 748				i to to t		LOID	
Previous Er	nployee	Next Employee) >	Sumr	mary				
NAME		ID≜							
			_ ^	Time	esheet	t Detail			
			E	Save	🕂 Add	X Delete	⊘ Cancel	× Co	lu
						Date		PayCod	le
					Mon	11/04/2019	0[W	ORK HC	DU
Test, Kyle Cha	andler 000	999901-TC2LD							
Test, Erin Deger	neres 0009	999902-TC2LD							

• View a different employee's timesheet – **Select another employee** (e.g. Test, Erin Degeneres) from the *Timesheets tab list.*



Enter a Missed In/Out Punch

1. While viewing an employee's timesheet, scroll down to the **Timesheet Detail** section.

Note: Maroon boxes in the In and Out columns identify missed punches.

Test, Kyl	e chandler	-	View Profile	🛅 View Sch	edule						
Location : Wa	usau Job : CNA	Pay Policy:	DEFAULT PAY	POLICY Shift	Number: DEFAULT	SHIFT Pay Cat	egory: Full Tim	e Holiday	y Rule: 8	HOUR HOLII	DAY
📏 Sumn	nary										
🗸 Time	esheet Detail										
🗎 Save 🖣	🖡 Add 💢 Delete	O Cancel	* Columns	nulti Add	lnsert/Repost	Multi Edit	Approve	🔒 Print)		
	Date		PayCode	In	In Rnd	Out	Out Rnd		Reg	OT	HOLW
	Sun 11/03/2019	0[W	ORK HOURS]		0:00AM	05:09PM	0:00AM	*	0.00	0.00	0.00
	Mon 11/04/2019	0[W	ORK HOURS]	06:58AM	7:00AM	* 04:07PM	4:15PM	*	9.25	0.00	0.00
	Tue 11/05/2019	0[W	ORK HOURS]	06:57AM	7:00AM	*	7:00AM		0.00	0.00	0.00

2. Click In (or Out) field and type time for missed in (or out) punch.

Note: When entering time, the system defaults hours entered as AM. System accepts AM designation if entered. To indicate afternoon/evening/night time correctly, type PM after time entry (e.g. 407PM).

Missed "In" Punch Example

💾 Sav	e 🕂 Add 🗶 Delete (Cancel × Columns	🎒 Multi Add 🗼	Insert/Repost)	Multi Edit	🥓 A
	Date	PayCode	In	In Rnd		Out	
2	Sun 11/03/2019	0[WORK HOURS]	659	0:00AM		05:09PM	
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	*	04:07PM	
	Tue 11/05/2019	0[WORK HOURS]	06:57AM	7:00AM	*		
							_

Missed "Out" Punch Example

E Save	🕂 Add 💢 Delete (Cancel × Columns	🎒 Multi Add	lnsert/Repost	📝 Multi Edit	🧹 Aj
	Date	PayCode	In	In Rnd	Out	(
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	0:00AM	05:09PM	(
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	* 04:07PM	. .
KØ.	Tue 11/05/2019	0[WORK HOURS]	06:57AM	7:00AM	* 337PM	1

3. Select Reason Code for each modified/corrected timesheet entry:

- Tab to Reason column. •
- From *Reason* drop-down list, select Reason Code. •



4. Click Save.

Timesheet modification/correction (e.g. missed punch) is processed and selected Reason Code displays on updated employee timesheet.

V lir	nesheet Detail										
🗎 Save	🕂 Add 🔀 Delete 🛛	⊘ Cancel	nulti Add	Insert/Repost)	Multi Edit	🖌 Approve	Print			
	Date	PayCode	In	In Rnd		Out	Out Rnd		Reg	ОТ	HOLW
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	7:00AM	*	05:09PM	5:15PM	*	10.25	0.00	0.00
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	*	04:07PM	4:15PM	*	9.25	0.00	0.00
	Tue 11/05/2019	0[WORK HOURS]	06:57AM	7:00AM	*	03:37PM	3:45PM	*	8.75	0.00	0.00

Notes	Reason	Audit
	MP [Missed Punch]	e,
		e,

Enter a Missed In/Out Meal Punch

1. While viewing an employee's timesheet, scroll down to the Timesheet Detail section.

Example: Employee forgot to punch out/in for a 30-minute lunch on Sunday, November 3.

2. Click Insert/Repost.

V T	imesheet Detail				_					
🗎 Sav	e 🖶 Add 🗶 Delete 🛛	⊘ Cancel	🚑 Multi Add	🗼 Insert/Repost	📝 Multi Ed	t 🖌 Approve	Print)		
	Date	PayCode	In	In Rnd	Out	Out Rnd		Reg	OT	HOLW
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	7:00AM	* 05:11P/	4 5:15PM	*	10.25	0.00	0.00
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	* 04:07P	M 4:15PM	×	9.25	0.00	0.00
	Tue 11/05/2019	0[WORK HOURS]	06:57AM	7:00AM	* 03:34P	M 3:30PM	*	8.50	0.00	0.00



- 3. In row 1, select **Date** and **Time** for missed *Meal Start*.
- 4. In row 2, select Date and Time for missed Meal End.
- 5. Click OK.

Insert/Repost Punches	Insert/Repost Punches
Select Date/Time Information	Select Date/Time Information
Date Time 1. Sun 11/03/2019 V 2. Sun 11/03/2019 V	Date Time 1. Sun 11/03/2019 ✓ 2. Sun 11/03/2019 ✓ 12:00PM
3. Sun 11/03/2019 ✓ 4. Sun 11/03/2019 ✓ 5. Sun 11/03/2019 ✓ 6. Sun 11/03/2019 ✓ 7. Sun 11/03/2019 ✓ 8. Sun 11/03/2019 ✓	5. Sun 11/03/2019 ▼ 4. Sun 11/03/2019 ▼ 5. Sun 11/03/2019 ▼ 6. Sun 11/03/2019 ▼ 7. Sun 11/03/2019 ▼ 8. Sun 11/03/2019 ▼
Notes: To INSERT one or more punches, please fill in the information above. Otherwise, please hit [OK] to REPOST a Pay Period.	Notes: To INSERT one or more punches, please fill in the information above. Otherwise, please hit [OK] to REPOST a Pay Period.

6. Click OK.



Time sheet modification/correction (e.g. missed meal in/out punch) is processed.

V Tim	nesheet Detail										
💾 Save	🖶 Add 🔀 Delete	⊘ Cancel	🎒 Multi Add	lnsert/Repost		Multi Edit	🖌 Approve	🔒 Print)		
	Date	PayCode	In	In Rnd		Out	Out Rnd		Reg	OT	HOLW
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	7:00AM	*	11:30AM	11:30AM	*	4.50	0.00	0.00
	Sun 11/03/2019	0[WORK HOURS]	12:00PM	12:00PM	*	05:11PM	5:15PM	*	5.25	0.00	0.00
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	*	04:07PM	4:15PM	*	9.25	0.00	0.00
	Tue 11/05/2019	0[WORK HOURS]	06:57AM	7:00AM	*	03:34PM	3:30PM	*	8.50	0.00	0.00



Adding Time or Other Entries

1. While viewing an employee's timesheet, scroll down to the Timesheet Detail section.

Test,	Kyle ch	andler		View Profile	🗒 View	Schedule)							
Location	: Wausau	Job : CNA	Pay Policy:	DEFAULT PAY I	POLICY S	hift Numb	er: DEFAULT	SHIFT	Pay Cate	egory: F ull Time	e Holida	ay Rule: 8	Hour Holi	YAC
Time	sheet fo	or Noven	ıber 03,	2019 to N	lovemb	er 16,	2019				S Attest	Status: C tation: N	DPEN Q lot Yet Su	bmitted
📏 Su	ımmary													
> T	imeshe	et Detail												
🗎 Sav	e 🕂 Add	🗙 Delete	⊘ Cancel	* Columns		dd 👔 I	nsert/Repost		Multi Edit	Approve	🔒 Print	t I		
		Date		PayCode	Ir	ı	In Rnd		Out	Out Rnd		Reg	OT	HOLW
×2	Mo	on 11/04/2019	0[V	VORK HOURS]	06:58	BAM	7:00AM	*	04:07PM	4:15PM	*	9.25	0.00	0.00

- 2. Click the next empty date field.
- 3. Select Date from list.

✓ Timesheet Detail		🗎 Save	🕂 Add 🗶 Delete 🥥						
💾 Save 🗣 Add 🗱 Delete	⊘ Cancel S Colum		Sun 11/03/2019	Multi Edit	🖌 Approve	🔒 Print)		
Date	PayCode		Mon 11/04/2010 Tue 11/05/2019	Out	Out Rnd		Reg	ОТ	HOLW
Mon 11/04/2019		k/	Tue 11/05/2019 Wed 11/06/2019 Fri 11/08/2019 Sun 11/09/2019 Sun 11/10/2019 Mon 11/11/2019 Tue 11/12/2019 Wed 11/13/2019 Thu 11/14/2019 Fri 11/15/2019 Fri 11/15/2019	04:07PM	4:15PM	*	9.25	0.00	0.00

- 4. Click **PayCode** field and select a **PayCode** from list.
 - If a Work **Hours** PayCode is selected, In and Out punch times must be entered.

> T	imeshee	et Detail						
💾 Sar	ve 🕂 Add	X Delete	🔗 Cancel	* Columns		Multi Add 🏮	Insert/Repost)(
		Date		PayCode		In	In Rnd	
	Mor	11/04/2019	OIWOR			06:58AM	7:00AM	
×2	Tue	11/05/2019	1HOLII 3ISICK	DAYJ LEAVEI				
			10[BER] 11[CAL] 12[JUR] 13[ON (14[PLT]	EAVEMENT] _ TIME] Y DUTY] CALL PAY]				
All sinhts	record		20[TRA 31[NO (32[FML	INING] CALL NO SHOV A]	V]			



V T	imesheet Detail					
💾 Sav	e 🕂 Add 🗶 Delete (Cancel Columns	🌇 Multi Add	lnsert/Repost	🛃 Multi Edit	🖌 Approve 🕒 Print
	Date	PayCode	In	In Rnd	Out	Out Rnd
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	* 04:07PN	4:15PM *
k 0	Tue 11/05/2019	0[WORK HOURS]	657			

• If a **non-working** PayCode (e.g. Jury Duty, Sick Leave, Bereavement, and PLT) is selected, the total number of hours (e.g. 8) must be entered in the REG column.

V T	✓ Timesheet Detail										
🗎 Sar	ve 🖶 Add 🗶 Delete 📢	2 Cancel × Columns		🗼 Insert/Repost)	Multi Edit	Approve	🔒 Prin	ıt		
	Date	PayCode	In	In Rnd		Out	Out Rnd		Reg	ОТ	HOLW
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	7:00AM	*	05:09PM	5:15PM	*	10.25	0.00	0.00
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	*	04:07PM	4:15PM	*	9.25	0.00	0.00
Þ/	Tue 11/05/2019	12[JURY DUTY]							8.00		

- 5. As appropriate, select **Reason Code**:
 - Tab to Reason column.
 - From *Reason* drop-down list, select Reason Code.
- 6. Click Save. Timesheet modification/correction is processed.

Approve an Individual Timesheet

Approve timesheet on an Individual OR on a By Page basis. The following are steps are how to approve an <u>individual</u> timesheet.

- 1. While viewing an employee's timesheet, scroll down to the Timesheet Detail section.
- 2. After completing modifications/corrections and confirming totals on an employee's timesheet, click **Approve**.

VT	ïmesheet Detail										
🗎 Sav	ve 🕂 Add 🗱 Delete 🛛	Ocancel Columns	🚑 Multi Add	🗼 Insert/Repost		👔 Multi Edit	Approve	🔒 Print)		
	Date	PayCode	In	In Rnd		Out	Out Rnd		Reg	ОТ	HOLW
	Sun 11/03/2019	0[WORK HOURS]	06:59AM	7:00AM	*	05:09PM	5:15PM	*	10.25	0.00	0.00
	Mon 11/04/2019	0[WORK HOURS]	06:58AM	7:00AM	*	04:07PM	4:15PM	*	9.25	0.00	0.00
	Tue 11/05/2019	12[JURY DUTY]							8.00	0.00	0.00
	Wed 11/06/2019	14[PLT]							8.00	0.00	0.00
	Thu 11/07/2019	14[PLT]							8.00	0.00	0.00



Tip: To simplify the Timesheet Detail view, click *Columns* button to select and hide unwanted timesheet columns. Follow the same process to unhide timesheet columns.

Approve Timesheets by Page

Approve timesheet on an Individual OR on a By Page basis. The following are steps are how to approve timesheets <u>by page</u>.

- While viewing Time Management > Attendance > Summary tab, review totals for displayed list of manager/designee's direct reports.
- 2. Click Approve this Page.
- 3. Repeat review and approval steps for each additional page of employee timesheets.

Tip: Apply various Filter options to filter employee timesheets page by Supervisor, Group, etc.

MENU	My Team Time Manag	ement					North Ce Person cents	ntral Health Care	
Attendance	Scheduler	Employees	Reports	Preferences	EWS Setup	Users Setup	Tools	Company Setup	Ru
Overview	Summary	Timesheets	Accruals History		In Out Boar	d Posting	Events		
Summary									
Pay Cycle:			Date Se	lection:	From:	To:			
Bi Weekly			Current I	Pay Period 🔽	11/03/2019	11/16/2019	Last updat	ed: Tuesday, 11/05	/201
Filtered by init	tiated date range	is between 11/03/2	019 and 11/16/	2019 [Clear Filters]					
Group / Filte	Group / Filter By: All			Employee Search	~			Cancel Filter	
Supervisor /	Filter By:								
Status Filter	: All		 ✓ 	Active Only					
Unopened Ti Opened Tim	imesheets: esheets:	0 748 Save	Approve th	is Page					
	ID≜		NAM	E	Missed	Punch	Sch.Hr	Reg.Hr	
000	000999901-TC2LD Test, K		le Chandler		0		0.00	9.25	
000	000999902-TC2LD Test, E		n Degeneres		0		0.00	0.00	
1									



Log Out of UltiPro

1. Click Logout.

Search	- ロ × (ア- 命☆隠 ⁹	North Central Health Care Printe contend Outcome forumat.
Todd Shnowske ▼ To Do	Share Ideas Help Logout	Your session has ended. You may now close this window.

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