



Online Services
Administrator Guide

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Online Client Services Summary

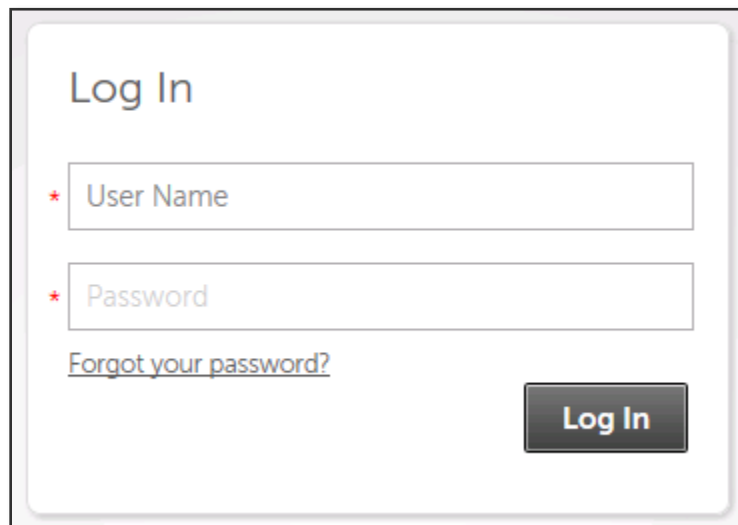
ProService Hawaii features a state-of-the-art Human Resources Management System (HRMS) that allows our clients to securely manage their company's HR-related information from any internet accessible personal computer. This access is made possible with the industry leading UltiPro platform from Ultimate Software, which is provided exclusively in Hawaii by ProService. UltiPro is the HRMS of choice for leading national companies, and the system provides features such as:

- A direct link to view and edit employee information and status in real time. Hire, terminate and promote employees all within the digital environment.
- Manage HR functions such as address changes and certification tracking.
- Upload and store digital documents to employee records to reduce the need for paper files.
- Simple integration with most other digital systems, including Time & Attendance solutions, using a robust suite of import and export techniques.
- View, print, save and schedule (Excel or PDF versions) real-time company reports including payroll reports, health care benefit summaries, paid-time-off/sick leave/vacation tracking reports, employee census data, etc.
- Create dashboards with actionable HR data to help you and your staff better manage your business.

Accessing the UltiPro Online Web Portal

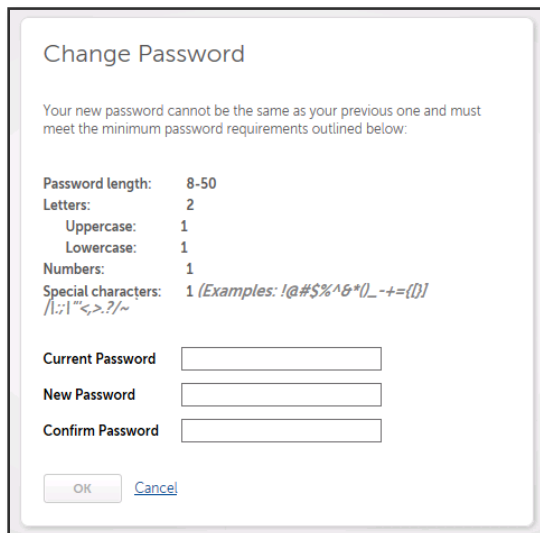
To access the website, go to: <https://proservice.ultipro.com>

Each login is standardized and will consist of a user name that is equal to the **user's last name, first initial and last 4 digits of their Social Security number** (ex. SmithJ1234) and a password that is their date of birth in a MMDDYYYY format (ex. 01311985.)



The screenshot shows a "Log In" form with two input fields: "User Name" and "Password", both marked with a red asterisk. Below the "Password" field is a link for "Forgot your password?". A "Log In" button is located at the bottom right of the form.

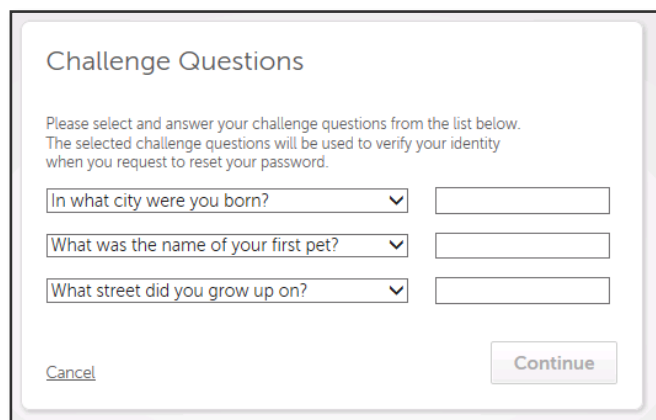
After the first login, a new password and 3 security challenge questions will be required.



The screenshot shows a "Change Password" form. It includes a note: "Your new password cannot be the same as your previous one and must meet the minimum password requirements outlined below:". The requirements are listed as follows:

Password length:	8-50
Letters:	2
Uppercase:	1
Lowercase:	1
Numbers:	1
Special characters:	1 (Examples: !@#\$%^&*()_-=+{} /:;"'<>./~/)

Below the requirements are three input fields: "Current Password", "New Password", and "Confirm Password". At the bottom are "OK" and "Cancel" buttons.



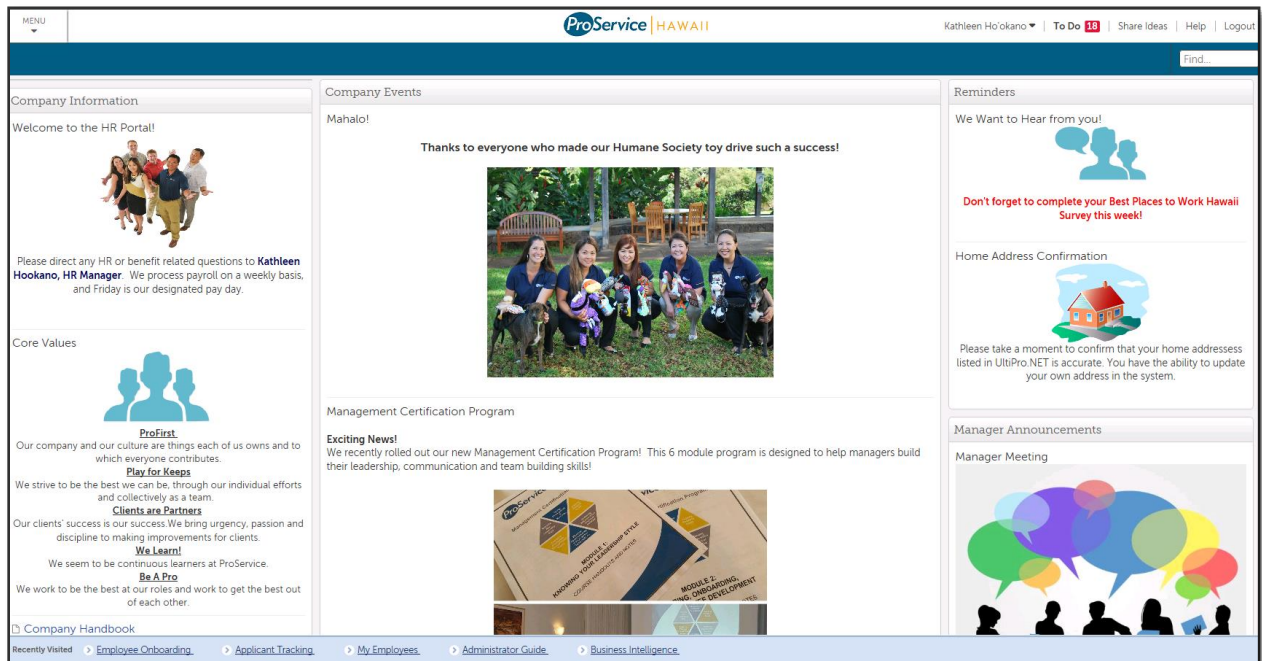
The screenshot shows a "Challenge Questions" form. It includes a note: "Please select and answer your challenge questions from the list below. The selected challenge questions will be used to verify your identity when you request to reset your password." Below this are three rows, each with a dropdown menu and an input field:

- In what city were you born?
- What was the name of your first pet?
- What street did you grow up on?

At the bottom are "Cancel" and "Continue" buttons.

Home Page

After logging in, the first page you encounter is the Home Page. The home page can contain customized information for your company, including announcements, documents, links to websites and images. Sections can be seen by all employees or you can limit viewing of information to specific roles.

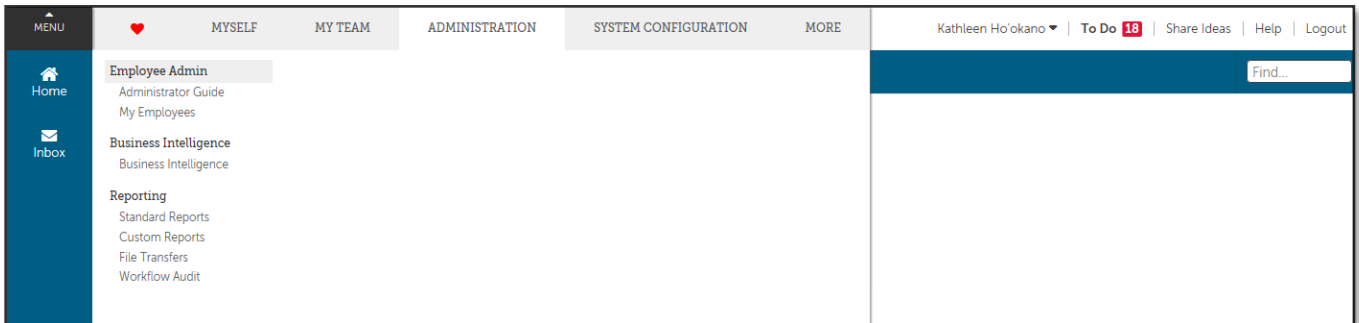






Page features:

- To Do (top right) – Shows how many unapproved items are in your inbox and links you directly to the approval section.
- Under your name (top right) there is an option of Preferences in the drop down menu - Allows you to set date & language preference as well as change your password
- Recently Visited (bottom ribbon) – Displays the last 5 pages you have visited and allows you to link directly to them.

Navigating in UltiPro

Moving around in UltiPro is as simple as navigating your favorite website. Most of your choices are available from the large Menu icon that is located in the top left corner of your web browser. Once you have clicked on the menu icon, you will select items by hovering your mouse over the icon in question and click on the choices that appear, listed below.











Icon	Description
	From the TO Do icon (top right), administrators can monitor activities that require their approval. This is important for clients that have employees making changes through self-service or managers making changes that require their approval.
	From the Myself icon, you can view your own personal information such as job and payroll information, including previous pay stubs and employer provided benefits.
	Administration > Reporting allows you to access basic UltiPro standard reports. Standard Reports often have filters that can be modified and saved as templates, which can save time when running the reports in the future.
	Administration > Business Intelligence allows you access to any customized reports that have been generated for you by ProService.

Icons and Actions

No matter where you are in UltiPro, you will be presented with similar icons for your convenience. These icons will launch processes specific to the pages that you are working in at the time. The icons are meant to be recognizable, but many of the functions are duplicated with descriptive links on the right side of your browser window under the heading 'Things I Can Do' as seen below.



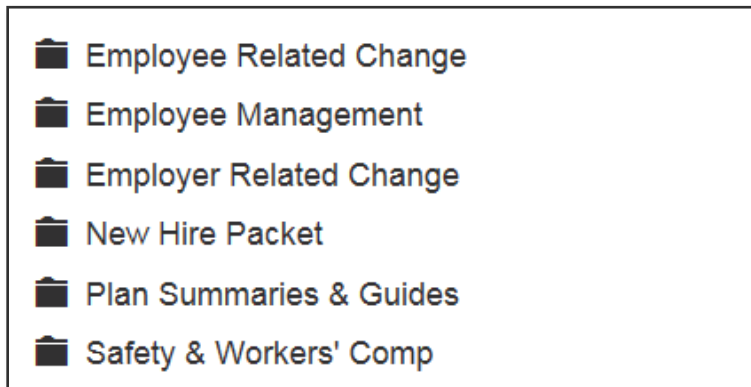
Icon	Description
 add	The Add button is used to add new information, whether it is a new hire, phone number or other information.
 edit	The Edit button is used to change previously added information like employee details.
 delete	The Delete button will remove information currently in the system.
 save	The Save button <u>must</u> be used to complete any additions or changes. If this button is not used before navigating away from a window, your changes will be lost.
 reset	The Reset button will erase any changes that you have made by returning you to the beginning of the add or change that is in process.
 cancel	The Cancel button will erase any changes that you have made and close the current process.
 print	The Print button will print a report version of the screen that you are currently working in. This print will then be directed to a printer connected to your PC.
 help	The Help button will provide you contextual help for the process or screen that you are currently working in. Please be aware some of the help may include processes not activated for your company.

Documents

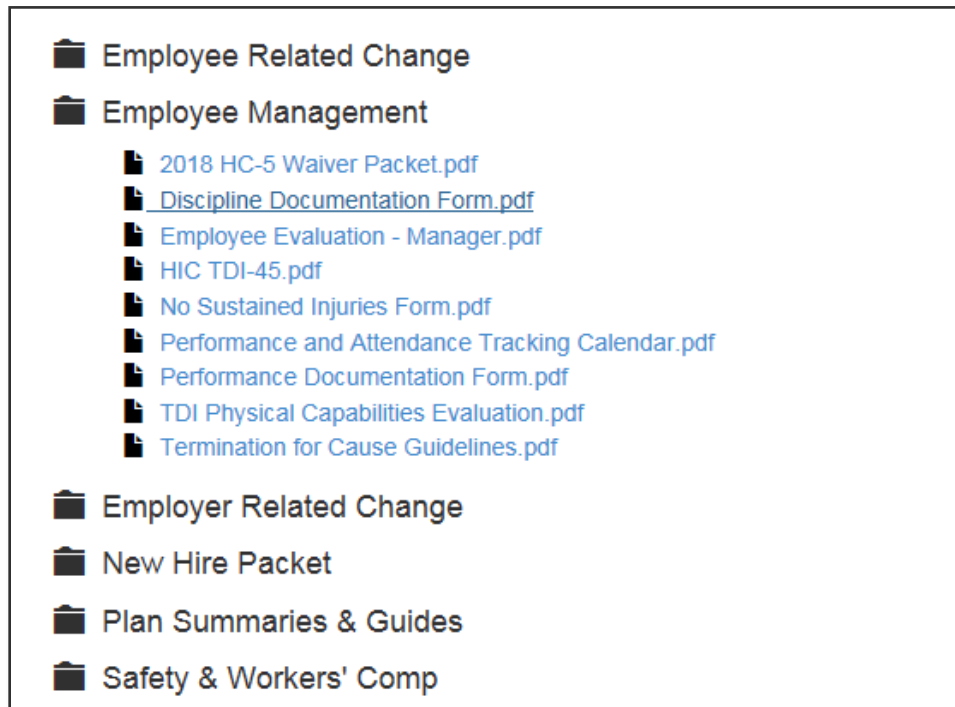
Location: Menu > Myself > My Company > Company Forms	Action: Access documents for employees, healthcare, safety, tax forms and more	Paperwork required to retain: Any documents for recordkeeping purposes
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Process:

1. Click on the name of the folder to expand and view related documents



2. Click on the document name to download

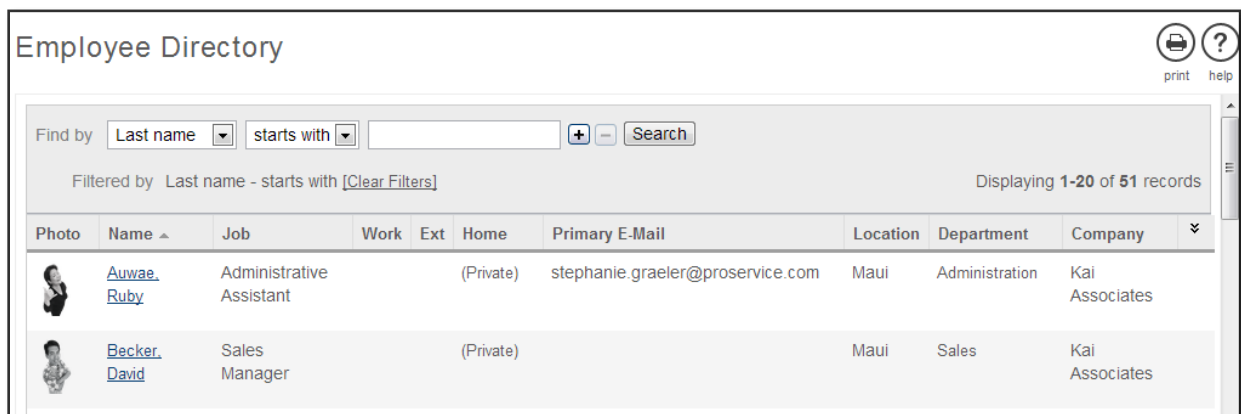


Employee Directory

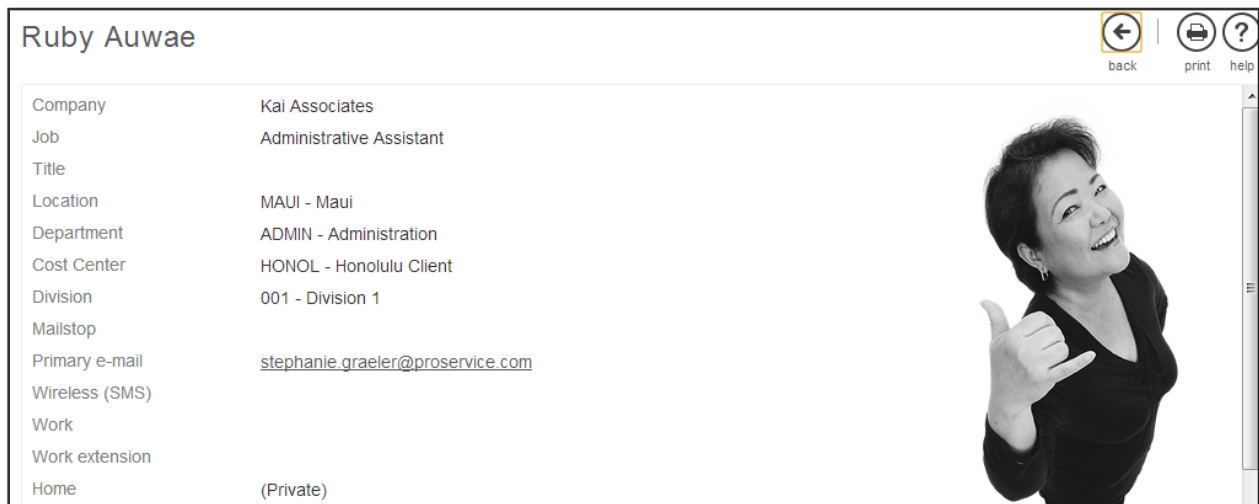
Location: Menu > Myself > My Company > Employee Directory	Action: Access employee list with contact information	Paperwork required to retain: None
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Process:

1. Under the Employee Directory section, search for an employee. You can leave the search box blank and click search to view all employees.



2. Click on an employee name to open the contact record for that employee.

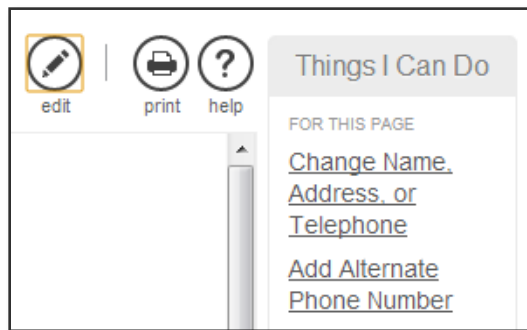


Name & Address Changes

Location: Menu > Administration > My Employees > Personal > Name, Address & Telephone	Action: Change Name or Address	Paperwork required to retain: None
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Personal section and then the Name, Address, and Telephone tab below it.
3. Click the **edit** button or the **Change Name, Address or Telephone** link under Things I Can Do.



4. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.

The screenshot shows a form titled 'Change Name, Address, or Telephone'. At the top right are icons for 'save', 'cancel', 'print', and 'help'. The form contains the following fields:

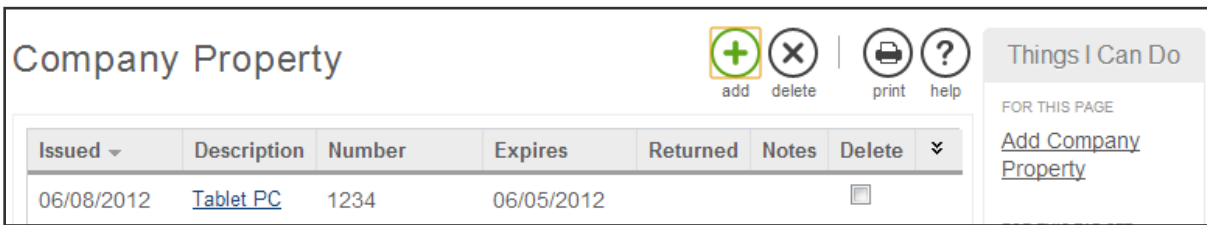
- Prefix: dropdown menu
- First: text input field with a red dot, containing 'Ruby'
- Middle: text input field
- Last: text input field with a red dot, containing 'Auwae'
- Suffix: dropdown menu
- Preferred first: text input field
- Former last: text input field
- Marital status: dropdown menu with 'None' selected

Property Management

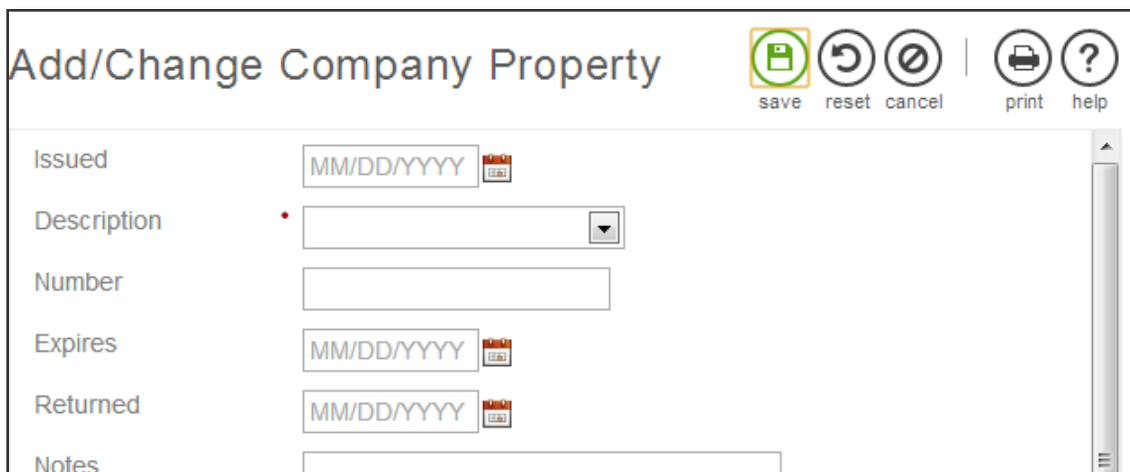
Location: Menu > Administration > My Employees > Personal > Property	Action: Track company property assigned to employees	Paperwork required to retain: None
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Personal section and then the Property tab below it.
3. Click the **add** button or the **Add Company Property** link under Things I Can Do. Click on the **description** of a property item to edit it.



4. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.

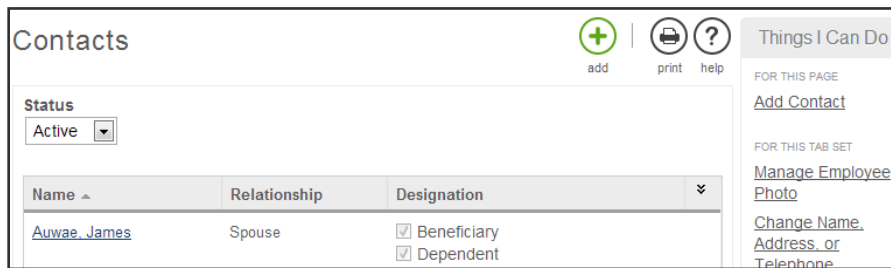


Contacts

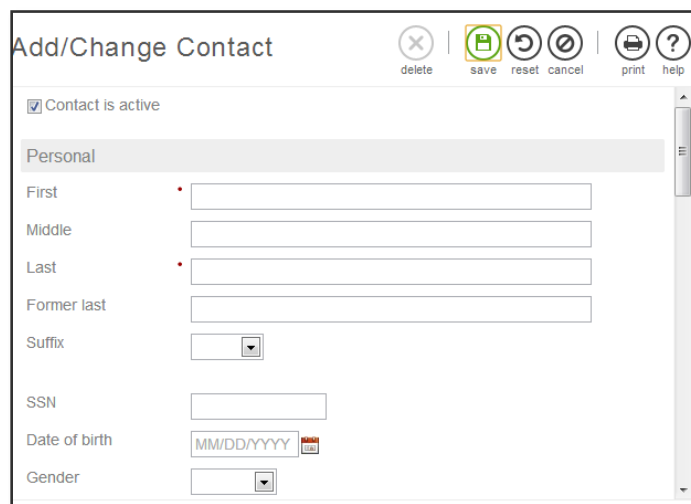
Location: Menu > Administration > My Employees > Personal > Contacts	Action: Add or Remove employee contact	Paperwork required to retain: None *
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Personal section and then the Contacts tab below it.
3. Click the **add** button or the **Add Contact** link under Things I Can Do. Click on the **Name** of a contact to edit it.



4. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.



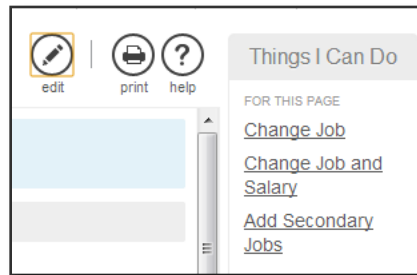
*Marking a contact as a dependent does not add them to benefit coverage. Benefit enrollment forms must be completed to enroll dependents in benefits

Job Changes

Location: Menu > Administration > My Employees > Jobs > Job Summary	Action: Change Job	Paperwork required to retain: None
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Jobs section.
3. Click the **edit** button or the **Change Job** link under Things I Can Do.



4. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.

A screenshot of the 'Change Job' form. The form has a title 'Change Job' and a toolbar with icons for 'save', 'cancel', 'print', and 'help'. Below the toolbar, there is a notification bar that says 'There are 2 pending transactions'. The form is divided into a 'General' section with the following fields:

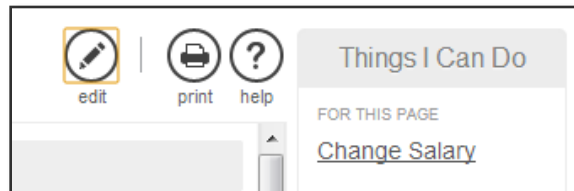
- Effective:** A date field with a red dot, containing 'MM/DD/YYYY' and a 'USA' dropdown.
- Reason:** A dropdown menu with a red dot.
- Current job:** A text field containing 'ADMIN - Administrative Assistant'.
- Job group:** A dropdown menu containing 'No values for this country'.
- New job:** A dropdown menu with a red dot, containing 'ADMIN - Administrative Assistant'.
- Alternate title:** A text field.
- Supervisor:** A text field containing 'Kathleen Ho'okano' with a search icon and an 'x' to clear the field.
- Hire source:** A dropdown menu.
- Project:** A dropdown menu.

Salary Changes

Location: Menu > Administration > My Employees > Jobs > Compensation	Action: Change Salary	Paperwork required to retain: None
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Jobs section and then the Compensation tab below it.
3. Click the **edit** button or the **Change Salary** link under Things I Can Do.



4. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.

NOTE: All pay changes will become effective at the beginning of the pay period that the effective date falls in. Please notify the service team separately to adjust or prorate pay changes. Also, retro pay for changes with an effective date in the past will need to be adjusted by your team as well.

Career & Education Tracking

Location: Menu > Administration > My Employees > Career & Education	Action: Track Licenses, Skills, Tests and Education for employees	Paperwork required to retain: None
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Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Career & Education section. Select the tab appropriate for the item you are adding. The options are: Licenses, Skills, Tests, Previous Employment, Awards and Education.
3. Click the **add** button or the **Add** link under Things I Can Do. Click on the **description** of an item to edit it.

Licenses and Certifications

add
 delete
 print
 help

Received	License / Certification	Number	Type	Provider	Renewal	Notes
07/23/2010	Professional in HR	568892	License	Ultimate Software Trainer	07/22/2011	
07/16/2010	Certified EE Benefit Spec	CBS56698	Certification	Society for HR Management	07/15/2011	
	Professional in HR		License			

Things I Can Do

FOR THIS PAGE

[Add Licenses/Certifications](#)

FOR THIS TAB SET

[Add Skills](#)

[Add Tests](#)

[Add Previous Employment](#)

[Add Awards](#)

[Add Education](#)

5. Complete the fields on the screen. Data fields with red dots are mandatory. Click Save, select the approver "HR Manager", and click Save. Once approved by an administrator, the system will update with the information.

Add/Change License or Certification

save
 reset
 cancel
 print
 help

License / Certification	*	<input type="text"/>
Number		<input type="text"/>
Received		<input type="text" value="MM/DD/YYYY"/>
Renewal		<input type="text" value="MM/DD/YYYY"/>
Provider		<input type="text"/>
Notes		<input type="text"/>

Employee Pay History

Location: Menu > Administration > My Employees > Pay > Pay History	Action: View or Print employee pay stubs	Paperwork required to retain: None
--	--	--

Process:

1. Under My Employees, search for the employee. Click on the employee name to open their record.
2. Click on the Pay section.
3. Click on the **pay date** to view the check stub for that date.

Pay History print help

Find by Date range From To

Displaying 11-20 of 29 records

Employee										
Pay Date	Document Number	Check Mode	Type	Voided	Voiding	Reconciled	Net Pay	Earnings	Deductions	Taxes
2013-10-04	491	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-09-06	468	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-08-02	445	Regular	Check				\$526.74	\$887.16	\$220.00	\$140.42
2013-07-05	422	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-06-07	399	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-05-03	376	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-04-05	353	Regular	Check				\$526.74	\$887.16	\$220.00	\$140.42
2013-03-01	330	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-02-15	307	Regular	Check				\$526.73	\$887.16	\$220.00	\$140.43
2013-02-08	278	Regular	Check				\$507.28	\$859.26	\$220.00	\$131.98

4. Click on the print icon to print the statement.

Pay Statement back download print help

This is a statement of earnings and deductions. This pay statement is non-negotiable.

2013-02-08

Kai Associates
111 SAMPLER WAY
HONOLULU, HI 96825

Pay Statement

Period Start Date 2013-01-27

Period End Date 2013-02-02

Pay Date 2013-02-08

Document 278

Net Pay \$507.28

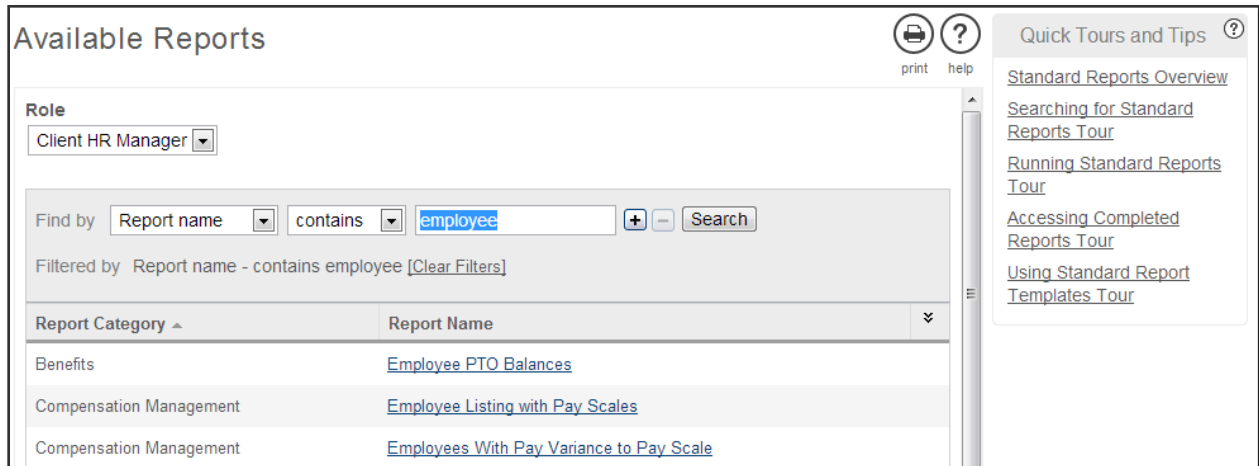
Pay Details					
RUBY AUWAE 15 ASHER LANE WAILUKU, HI 96793 USA	Employee Number SSN Job Pay Rate Pay Frequency	325500045 xxxxxxxx Administrative Assistant \$20.70 Weekly	Pay Group Location Department Sub-Dept Division	KAI ASSOCIATES WEEKLY Maui ADMIN - Administration's HONOL - Honolulu Client 001 - Division 1	Federal Income Tax HI State Income Tax (Residence) HI State Income Tax (Work)
					M 1 S 0 S 0

Standard Reports

Location: Menu > Administration > Reporting > Standard Reports	Action: Run standard UltiPro reports	Paperwork required to retain: None
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Process:

1. Under Reporting there are 3 tabs. The Completed tab allows access to previously run reports.
2. To run a new report, click on the Available tab.
3. To find a report, select a Find by option from the drop down menu and then the method of search (starts with, contains, is, is not) and enter the search criteria in the box. If the complete name of the report is unknown, use the 'contains' option to find all reports that contain the search word. NOTE: if the field is left blank, a search will return all reports.
4. Click Search to return results.



5. Click on the report name to launch the report. A new window will open with a wizard to walk through the report options.

6. Select the report criteria. The report wizard will have several screens that will have various options based on the report options. Click the arrows to move through the screens. Report prompts can include:
 - a. Date ranges
 - b. Employee types or status
 - c. Sorting and Grouping
 - d. Report output (PDF, Excel)

Employee PTO Balances
Kathleen Ho'okano - 325500021 - Kai Associates

ProService HAWAII

Report Criteria

Grouping / Sorting

Report Output

Summary

Report Criteria

Company
Kai Associates

Selection All Employees

Employee status

Available

- Leave of absence
- On strike
- Released/laid off
- Suspended
- Terminated
- Active

Selected

Navigation: back, next, finish, reset, cancel, print, help

7. The last page of the report wizard is a summary screen that shows the prompt selection. Click the Finish button to create the report.

Employee PTO Balances
Kathleen Ho'okano - 325500021 - Kai Associates

Report Criteria | Summary | Grouping / Sorting | Report Output

Summary

Request Information | Report Criteria

Show All fields

	Before	Submitted
Country	New	
Calendar period	New	
Payroll cycle type	New	
Company	New	Kai Associates
Additional employees	New	
Selection	New	
Employee status	New	Active
Selected employees	New	

- The report wizard window will close. Go to the Completed tab to review the report.
NOTE: Some large reports take longer to run. If the report is not immediately available in the complete list, click the refresh button. When the report is complete, it will display in the list.

Standard Reports | Custom Reports | File Transfers | Workflow Audit | Find...

Completed | Available | Saved Templates

Completed Reports

delete refresh print help

Find by Report name starts with [] Search

Report Name	File Type	Report Category	Created	Expires	Notes	Delete
Employee PTO Balances	PDF	Benefits	2018-07-27 4:26 PM	2018-10-27		<input type="checkbox"/>

- Click on the report name to view the report.

Employee PTO Balances Demo1 Page 1
Jul 27, 2018 4:26 PM

Select: Company is DEMO1 - Kai Associates and Employee Status in A
Sort Order: Employee Name (Last, First MI)(Asc)

Employee Name	Number	Accrual code	Accrual option	Pending	Allowed	Taken	Available	Dates	
								Accr thru	Last roll
Employee Name (Last, First MI): Auwae, Ruby A.									
Auwae, Ruby A.	325500045	PTO SICK	DEMOPT MONTH	0.00 0.00	166.00 0.00	8.00 0.00	158.00 0.00	2/1/2014 1/1/2011	1/1/2014