Online Services Administrator Guide

ProService HAWAII

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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.

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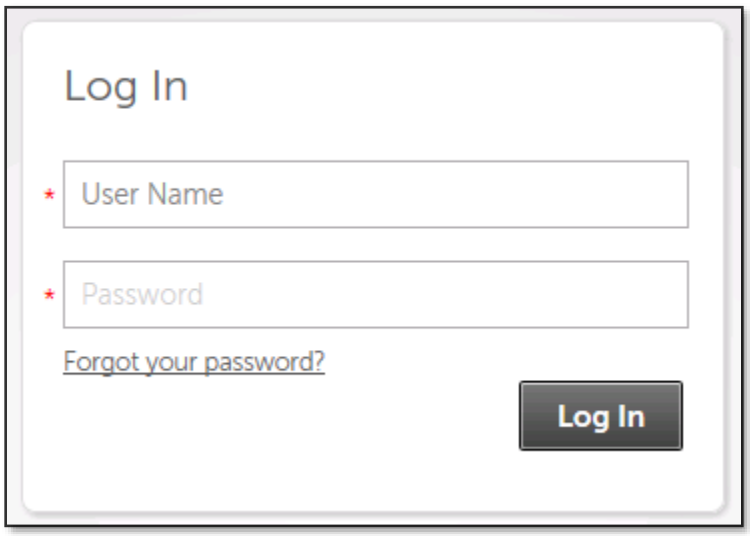
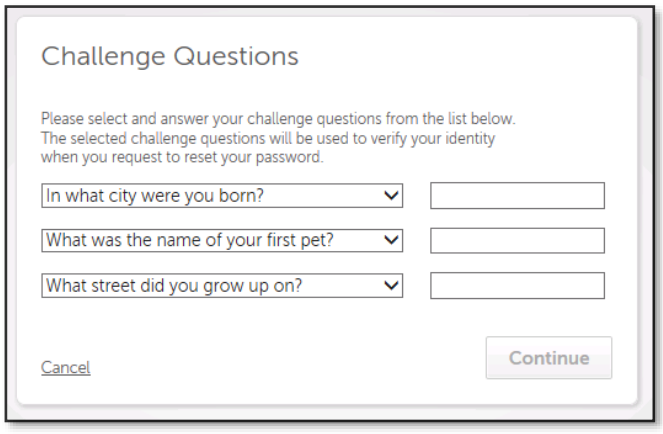
Accessing the UltiPro Online Web Portal

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.)

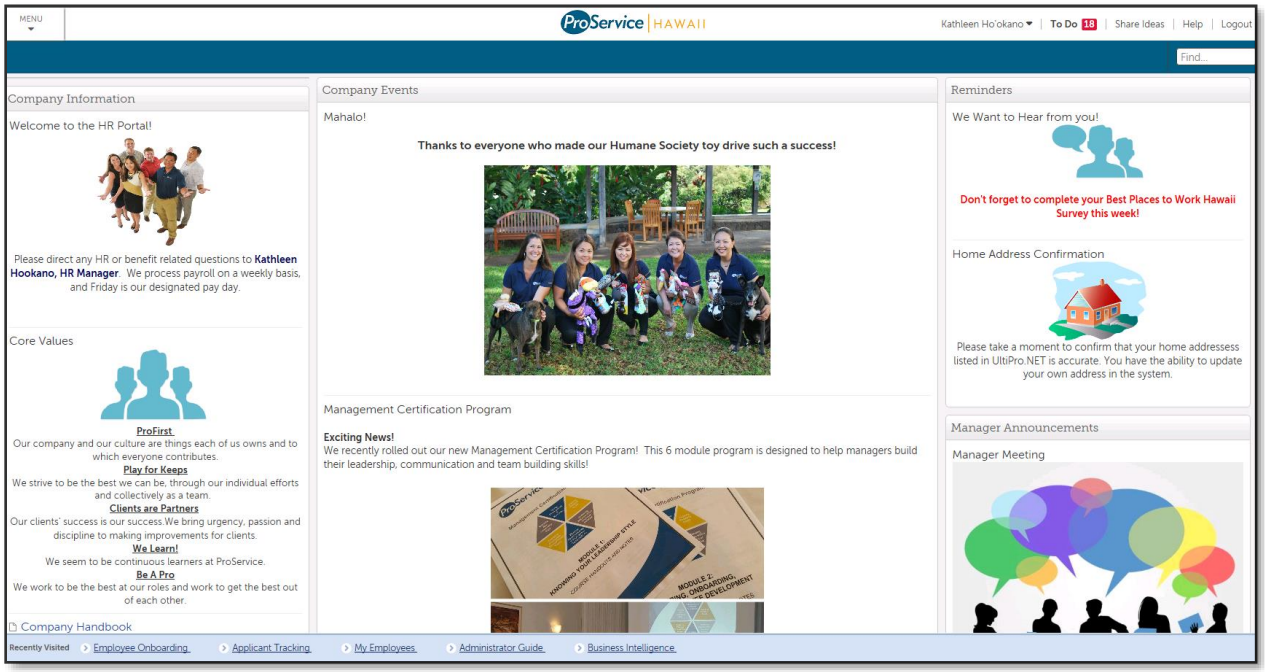


After the first login, a new password and 3 security challenge questions will be required.



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.

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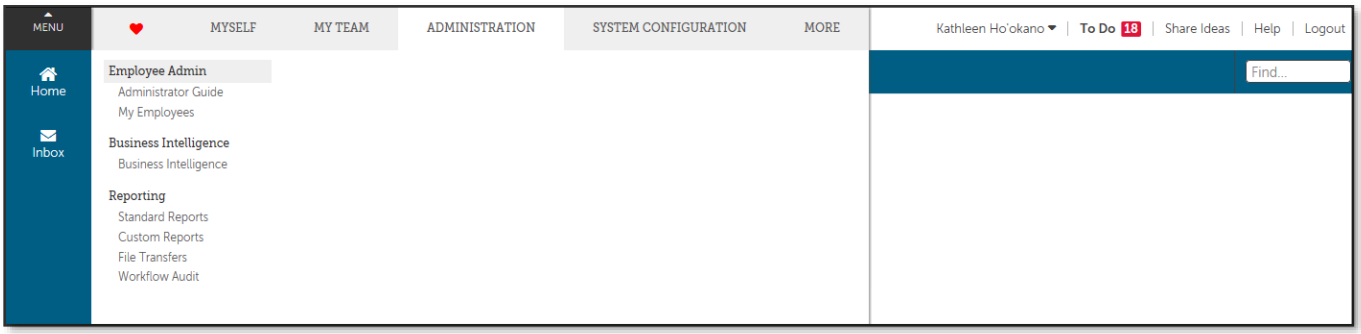
Navigating in UltiPro

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
To Do	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.
MYSELF	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	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	Administration > Business Intelligence allows you access to any customized reports that have been generated for you by ProService.

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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 must 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 a 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.

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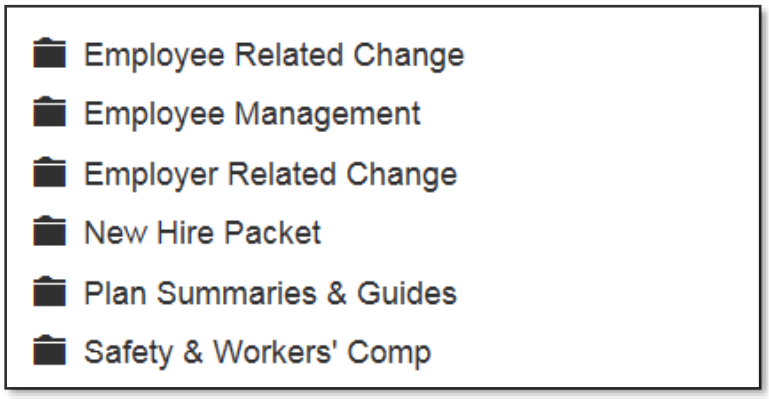
Documents

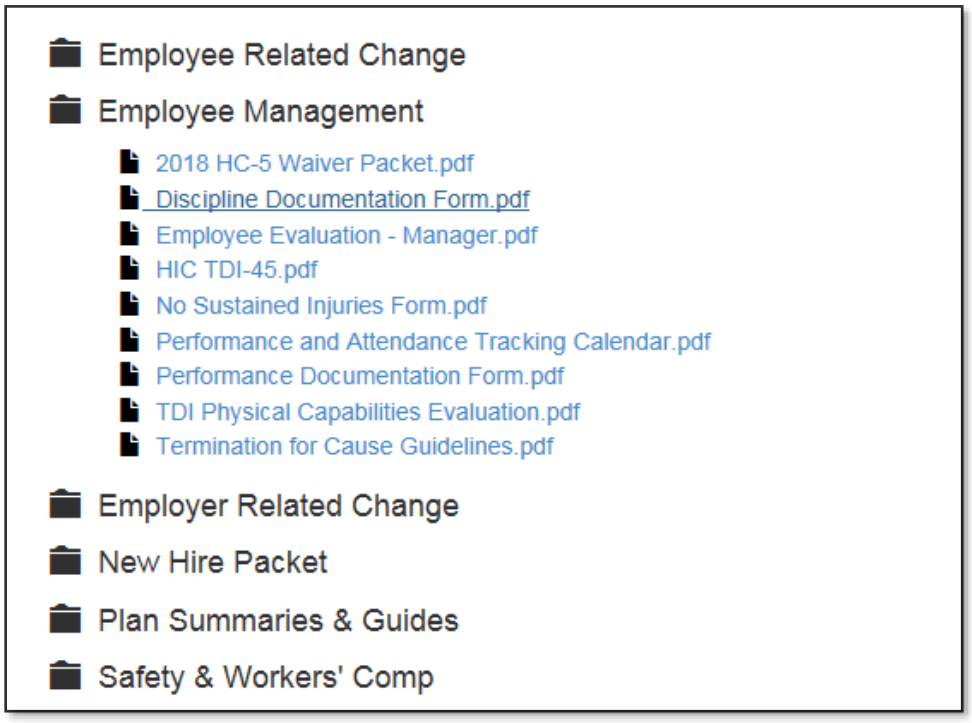
Location:	Action:	Paperwork required to retain:
Menu > Myself > My Company > Company Forms	Access documents for employees, healthcare, safety, tax forms and more	Any documents for recordkeeping purposes

Process:

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



2. Click on the document name to download



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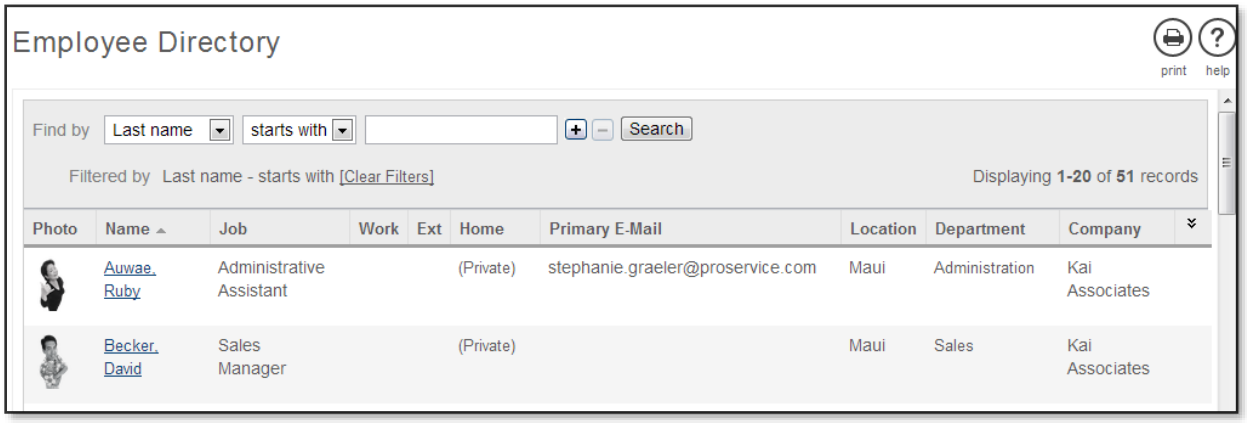
Employee Directory

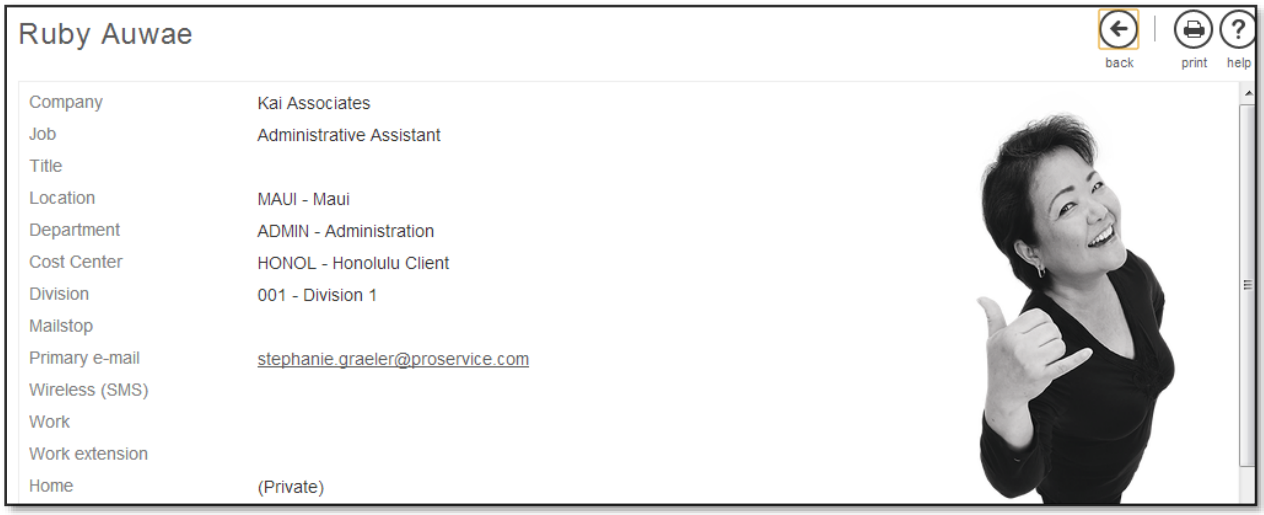
Location:	Action:	Paperwork required to retain:
Menu > Myself > My Company > Employee Directory	Access employee list with contact information	None

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.



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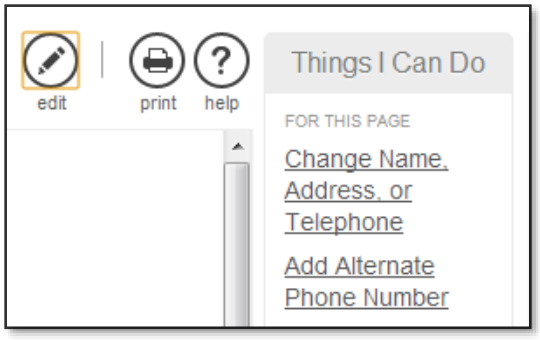
Name & Address Changes

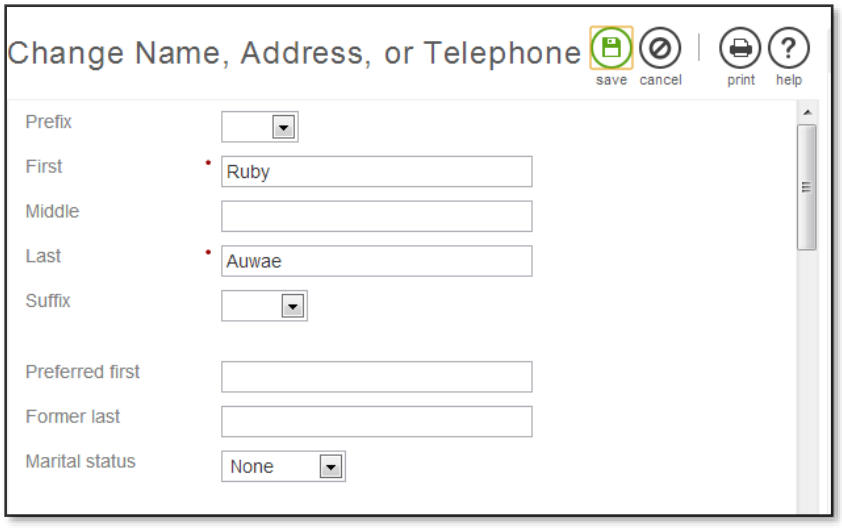
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Personal > Name, Address & Telephone	Change Name or Address	None

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.



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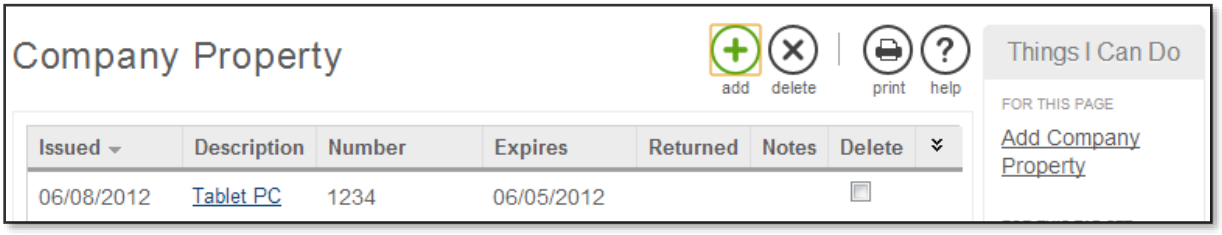
Property Management

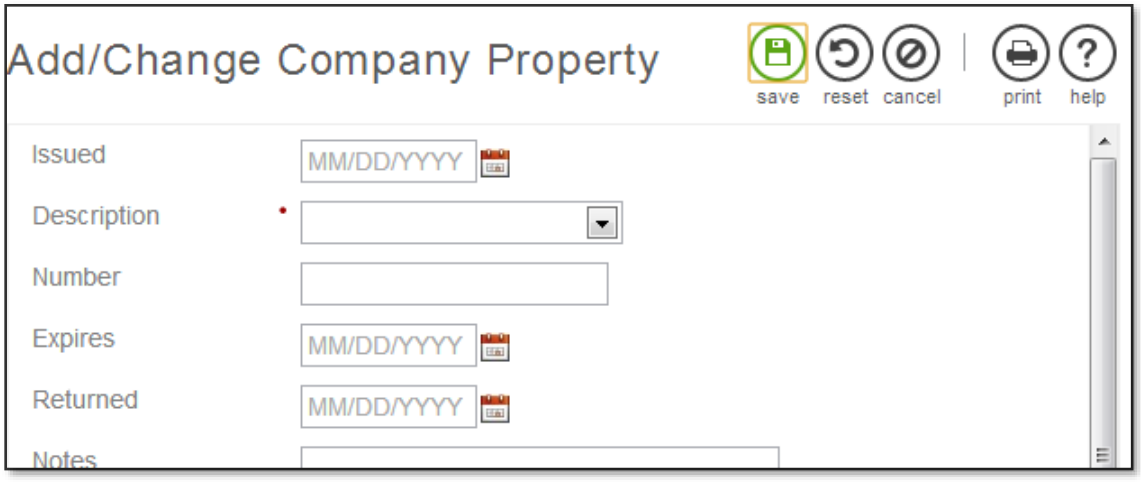
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Personal > Property	Track company property assigned to employees	None

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.



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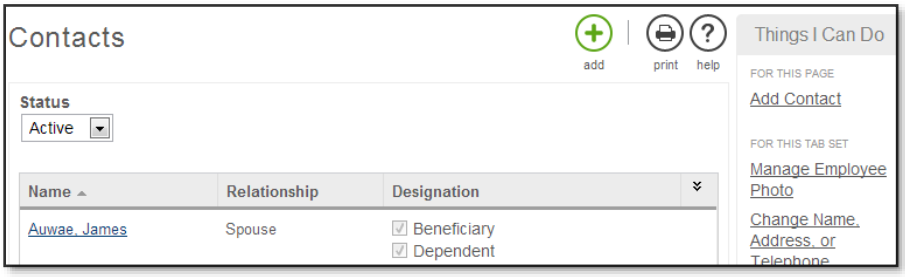
Contacts

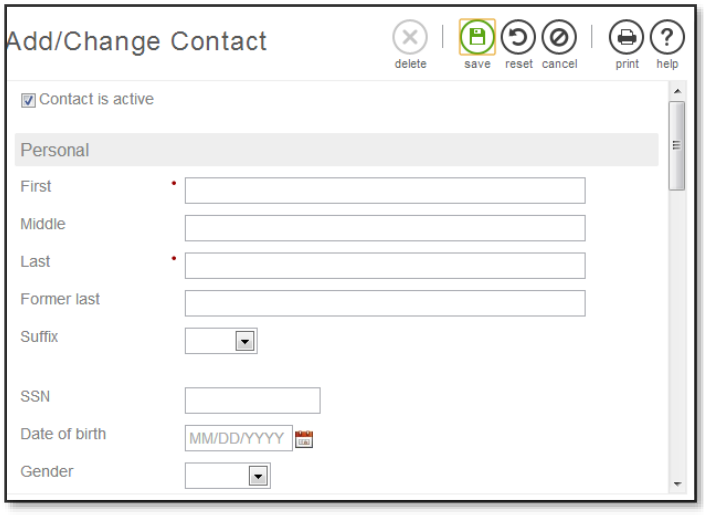
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Personal > Contacts	Add or Remove employee contact	None *

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

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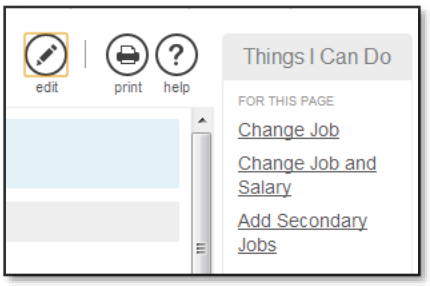
Job Changes

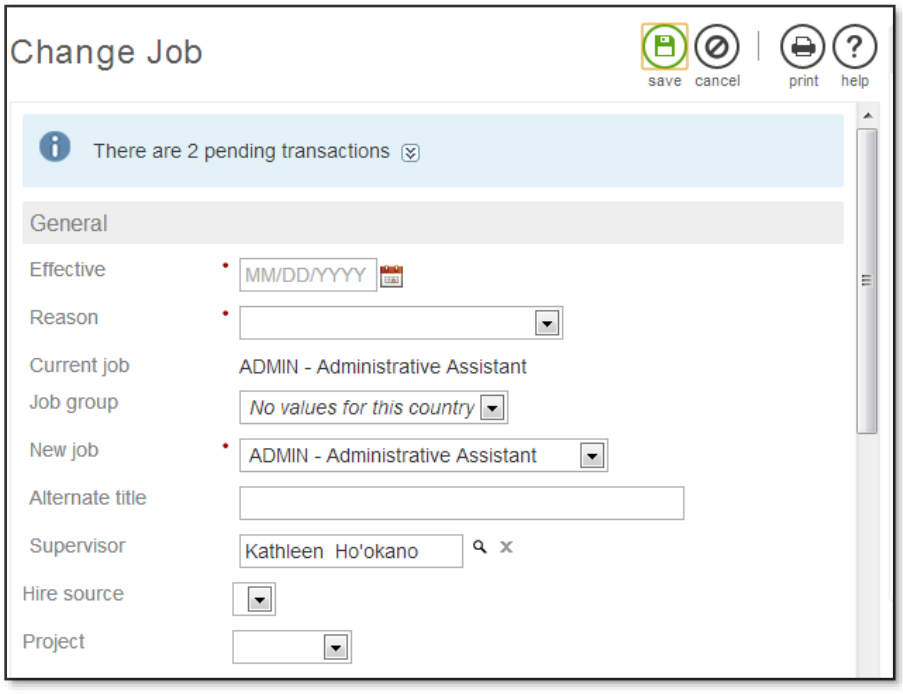
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Jobs > Job Summary	Change Job	None

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.

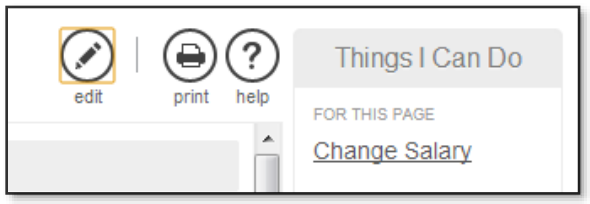


Salary Changes

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

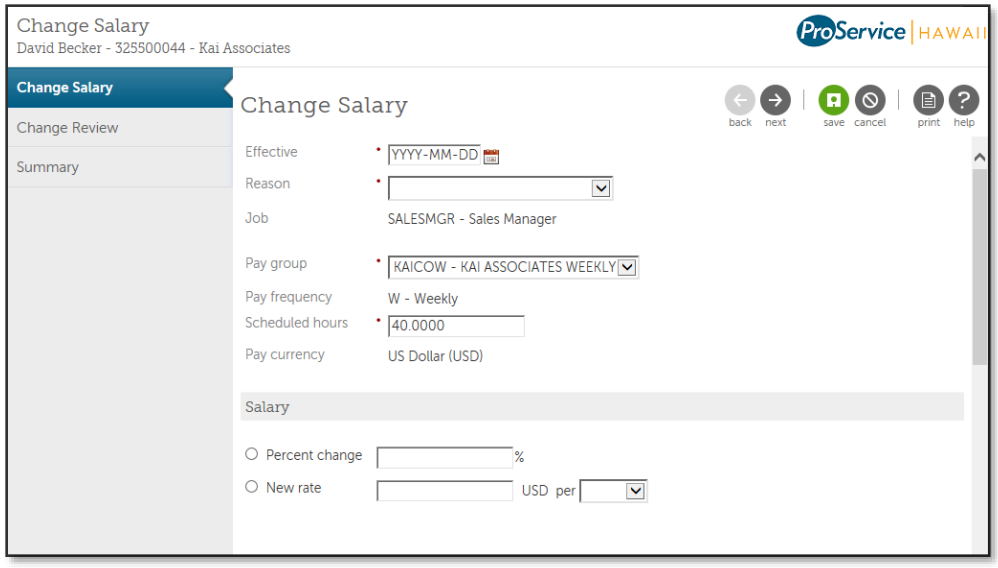
Process:

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.



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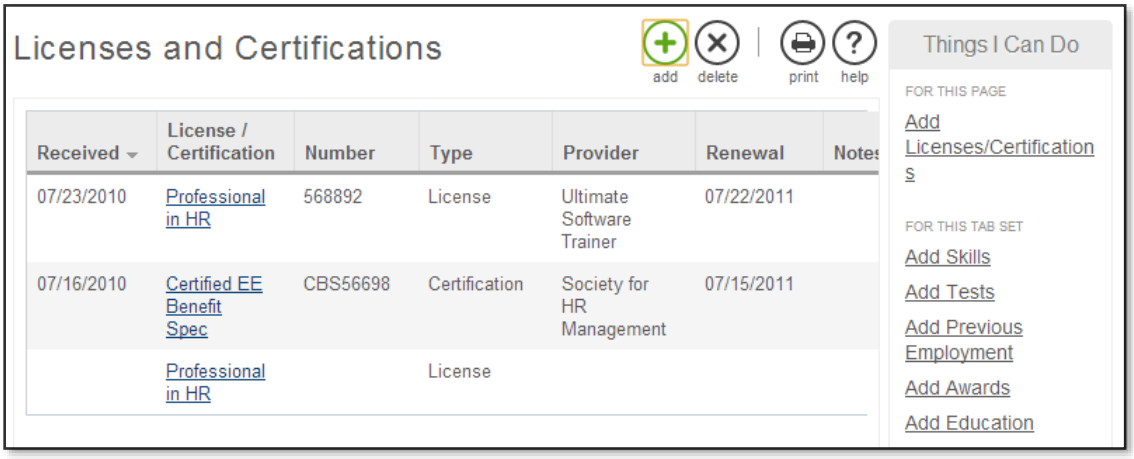
Career & Education Tracking

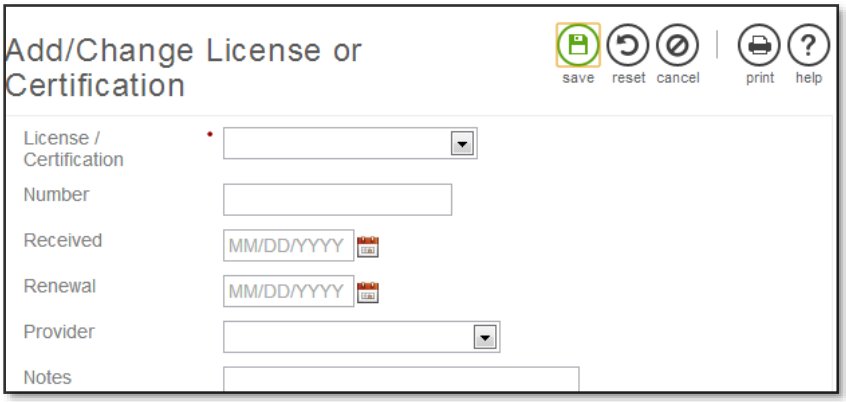
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Career & Education	Track Licenses, Skills, Tests and Education for employees	None

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.



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.

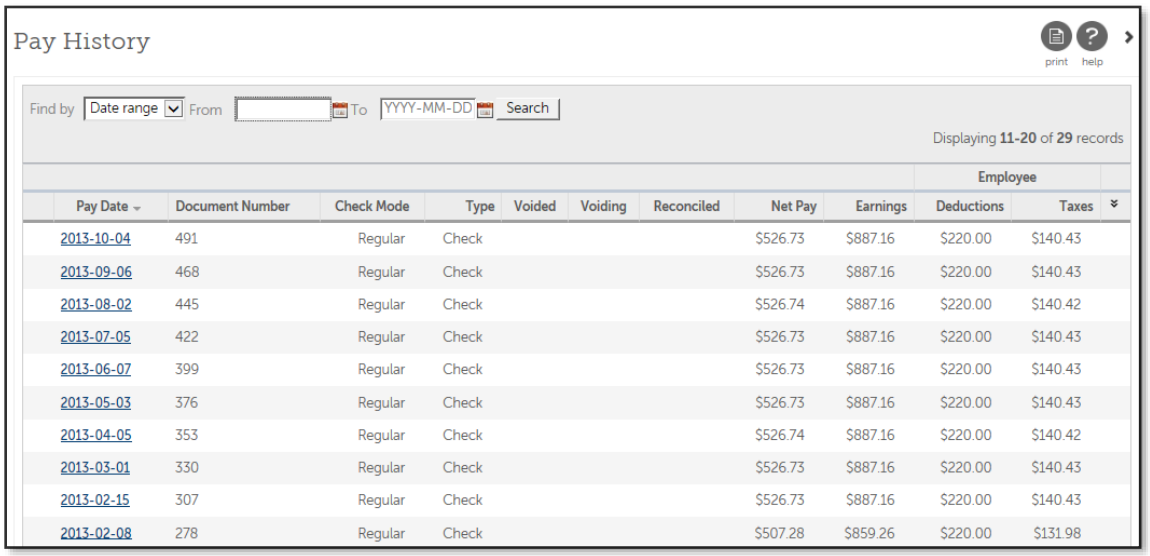


Employee Pay History

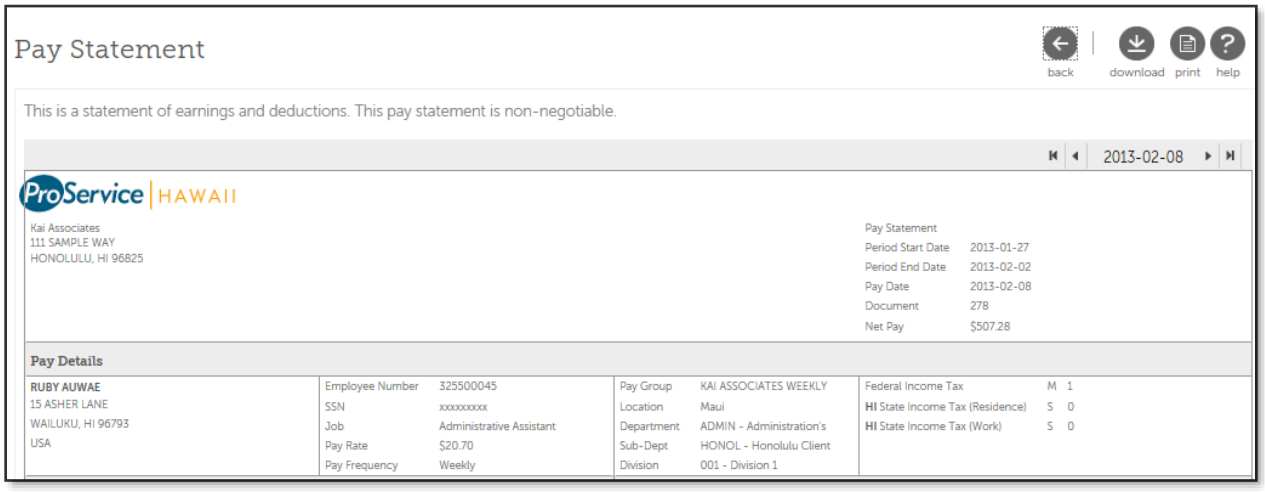
Location:	Action:	Paperwork required to retain:
Menu > Administration > My Employees > Pay > Pay History	View or Print employee pay stubs	None

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.



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



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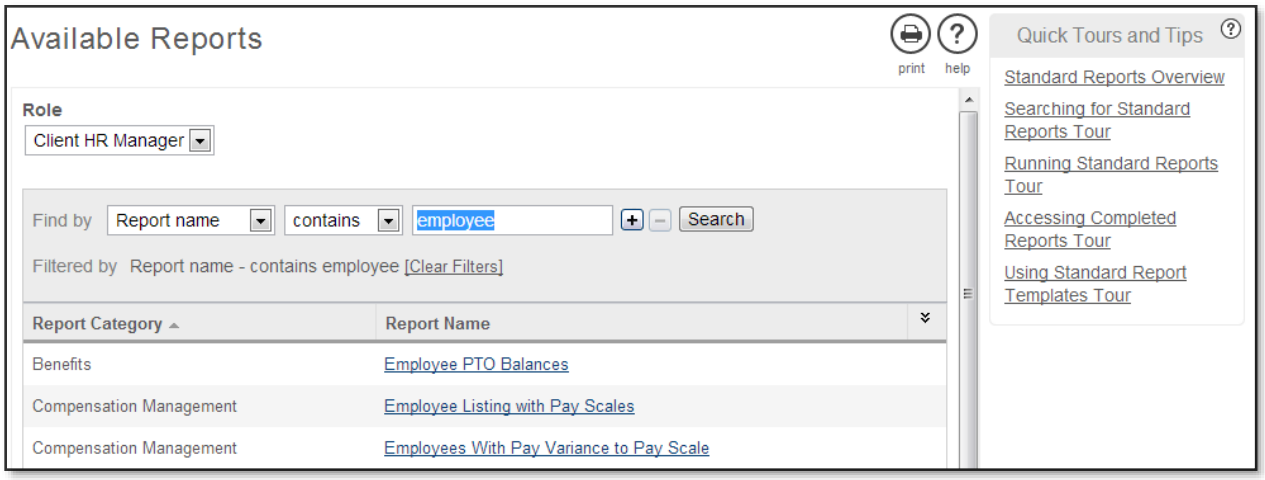
Standard Reports

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

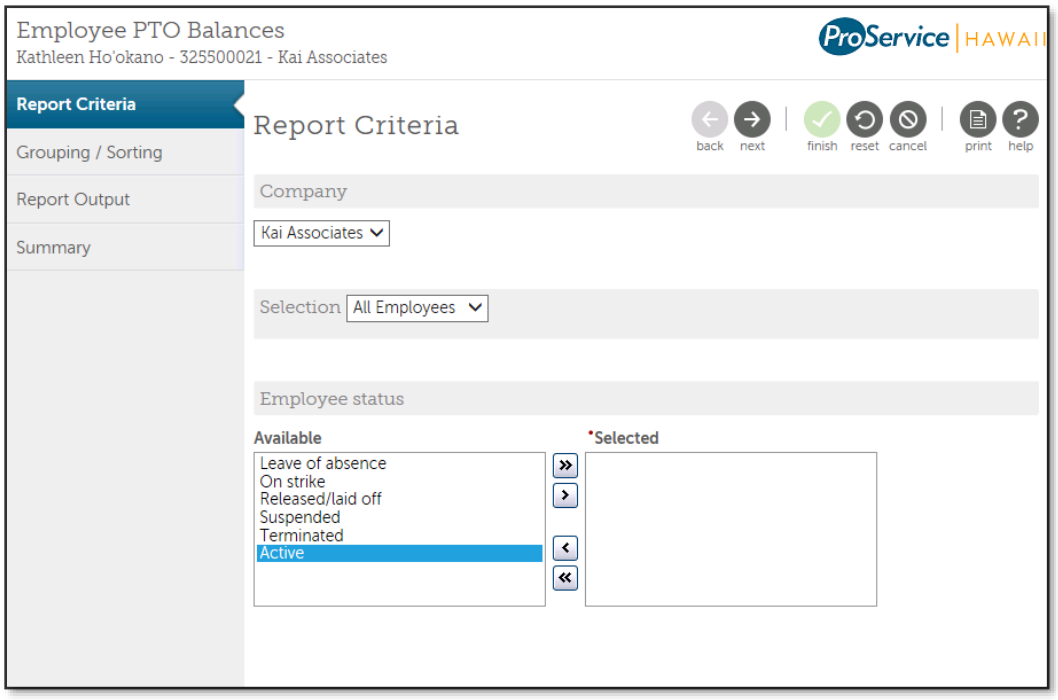
Process:

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.

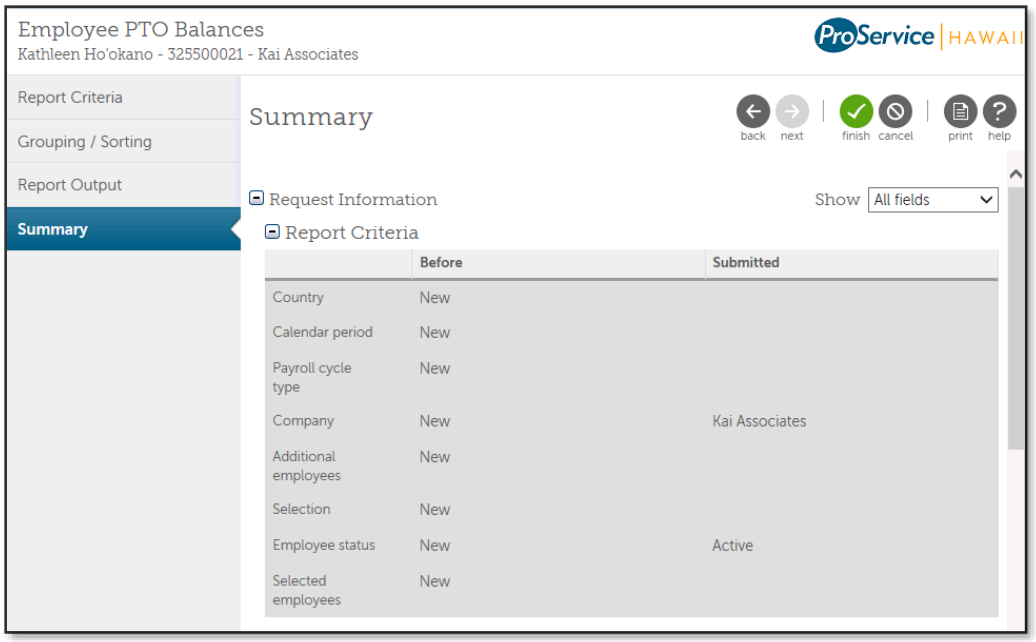


5. Click on the report name to launch the report. A new window will open with a wizard to walk through the report options.

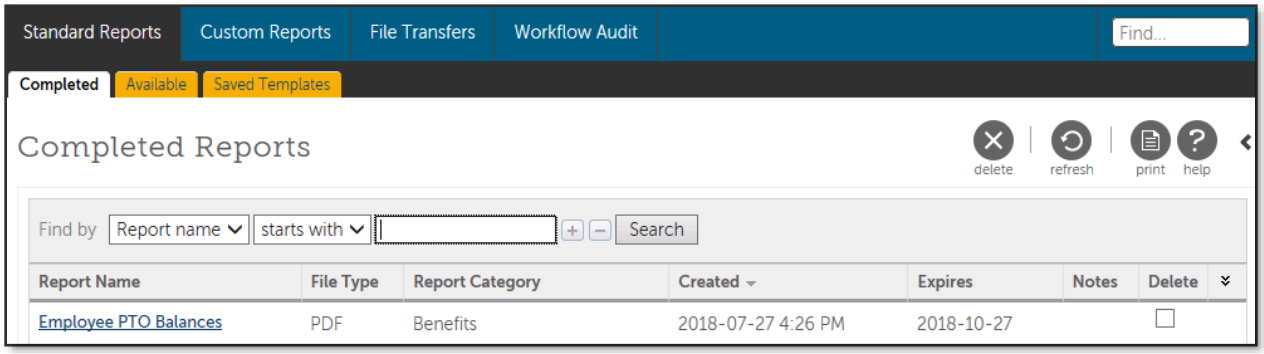
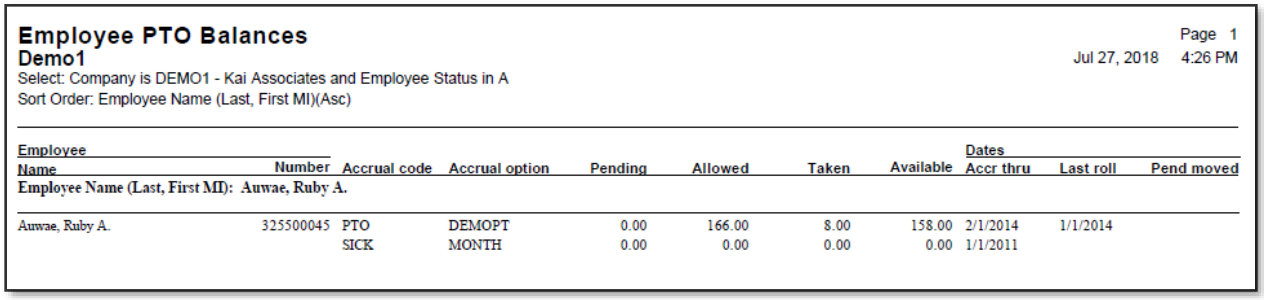
6. Select the report criteria. The report wizard will have several screens that will have various options based on the report options. Click the arrows to move through the screens. Report prompts can include:
    a. Date ranges
    b. Employee types or status
    c. Sorting and Grouping
    d. Report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



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.



8. 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.



9. Click on the report name to view the report.