

Manager Self Service: Workflow Overview for Managers, Approvers and Observers

What is Workflow?

- A change to an employee's job, pay rate or other key employment data that is initiated in Manager Self Service must go through the Workflow process in UltiPro.
- Workflow is a series of steps that allows for review and approval of the change by various other individuals in the organization before it is completed.
- It also allows other stakeholders who need to know the change has been made, but may not need to approve the change, to act as Observers.

How Does Workflow Happen?

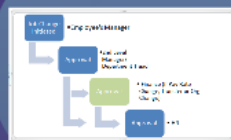
As the Manager completes the change request, the data is sent to the system for processing. The system change is initiated through approval levels and the type of approval required.

- Approval Level One: The level manager sets the workflow that allows the initiator to Department Head, if approved the manager has to be selected approver individuals as approvers.
- Approval Level Two: Certain changes like Pay Rate Changes, Org Changes and Transferring HR.
- Approval Level Three: It requires Director, Job Change results and Pay Rate Change. Org Change or Job Transfer, then HR is the 2nd approver.

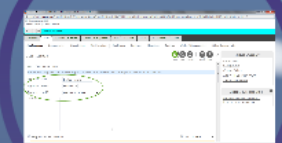
Workflow In Action: UltiPro In Box



Workflow In Action: Process Flow



Workflow In Action: Approver Selection



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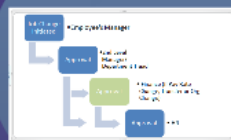
As the Manager completes the change request, the data is sent to the system for processing. The system change is initiated through approval levels and the type of approval required.

- Approval Level One: The level manager (eg. the Manager) who initiates the change in the Department is there. It allows the manager to request to select approval individuals as approvers.
- Approval Level Two: Allows changes for Pay Rate Changes, Org Changes and Transfers to HR.
- Approval Level Three: It requires someone else to change results and Pay Rate Changes (eg. change to a Transfer, even HR is the 2nd approver).

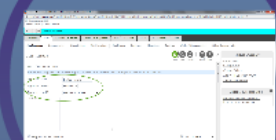
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archy to select

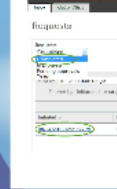
(for Pay Rate

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Org Change or is

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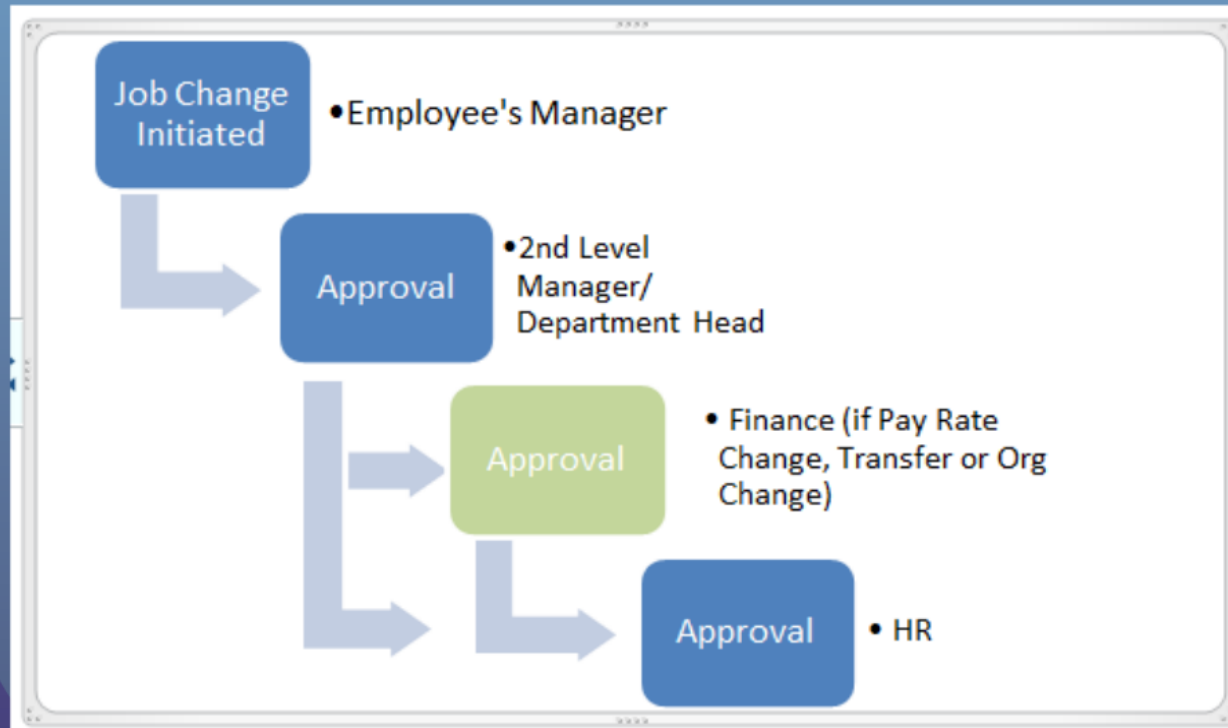
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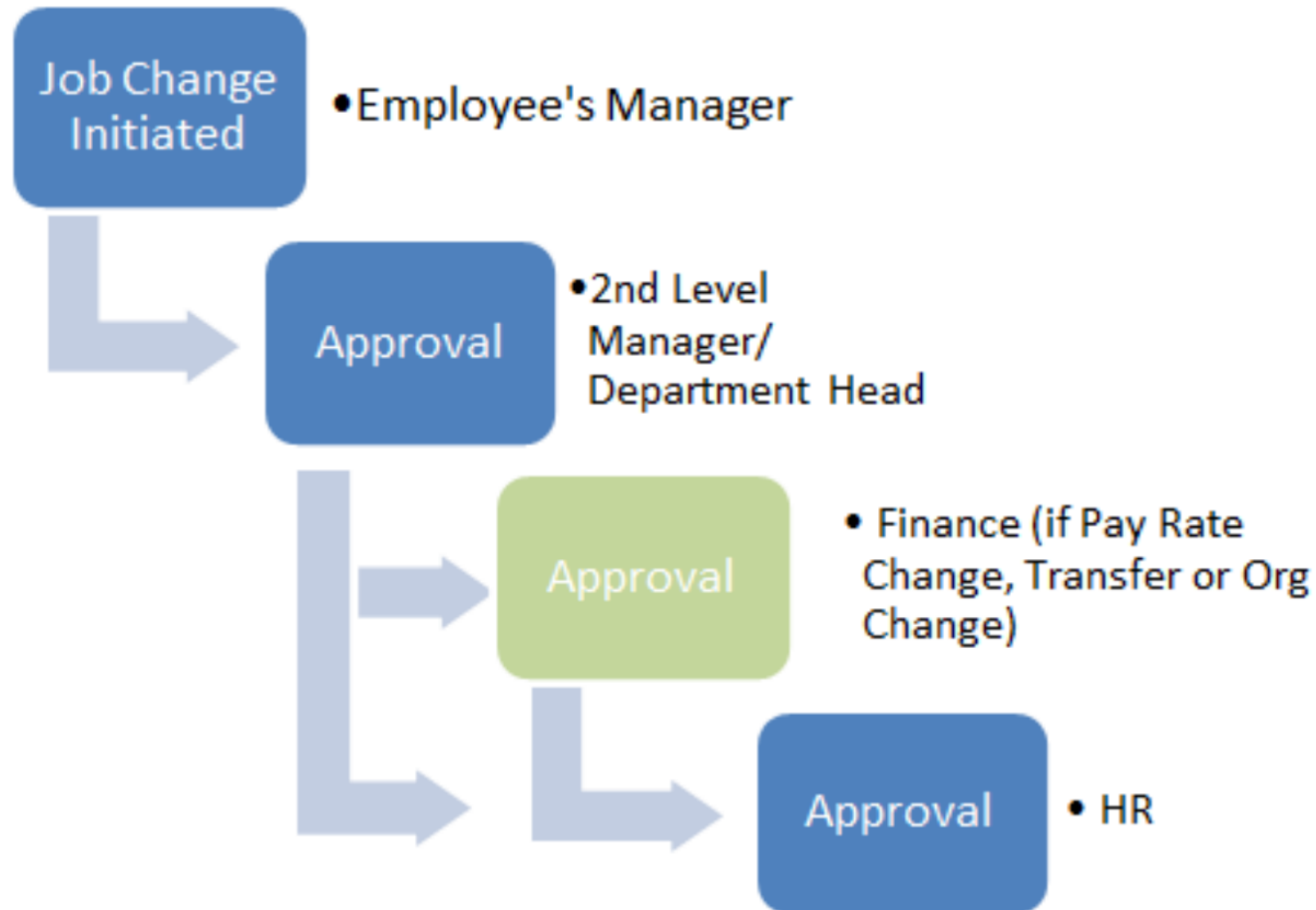
As the manager completes the change request, the last step is to designate correct Approvers. The type of change determine how many approval levels and what type of Approval is required.

- **Approval Level One** - 2nd level manager (eg, the manager directly above the initiator) or Department Head. UltiPro uses the manager hierarchy to select appropriate individuals as Approvers.
- **Approval Level Two** - either Finance (for Pay Rate Changes, Org Changes and Transfers) or HR.
- **Approval Level Three** - If required (because the Job Change results in a Pay Rate Change, Org Change or is a Transfer), then HR is the 3rd approver.

Workflow In Action: Process Flow



PROCESS FLOW



Workflow In Action: Approver Selection

Geneva Weasley - 000200408 - CH Development, LLC - Mozilla Firefox

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CH Development, LLC
Geneva Weasley - 000200408

Geneva Weasley

Personal | **Jobs** | Career & Education | Career Development | Pay | Benefits | Taxes | Documents | Audit

Job Summary | Compensation | Organization | Work Location | Job History | Contracts | Allocations | Reviews | Workers' Compensation | Other Company Info

Summary

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

Approver Level 1: Potter, Harold

Approver Level 2: Finance

Approver Level 3: Default Approver

Comments

Request Information

Show All fields

Things I Can Do

FOR THIS TAB SET

- [Change Job](#)
- [Change Salary](#)
- [Add Work Location \(USA\)](#)
- [Add Review History](#)

Quick Tours and Tips

- [Performance Management – Resources for Managers](#)

Approver Selection

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https://nz13.ultipro.com/DefaultChild.aspx?USParams=pageName=DefaultChild.aspx&coid=7T4KD!country=USA!currentpage=1!eid=ANXD4M0000K0!pagecount=1!pagesize=50!pk=MSS!role=SUPER!roleid=16!subdivrerid=945!

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Workflow Approvals

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Approver Level 1

Approver Level 2

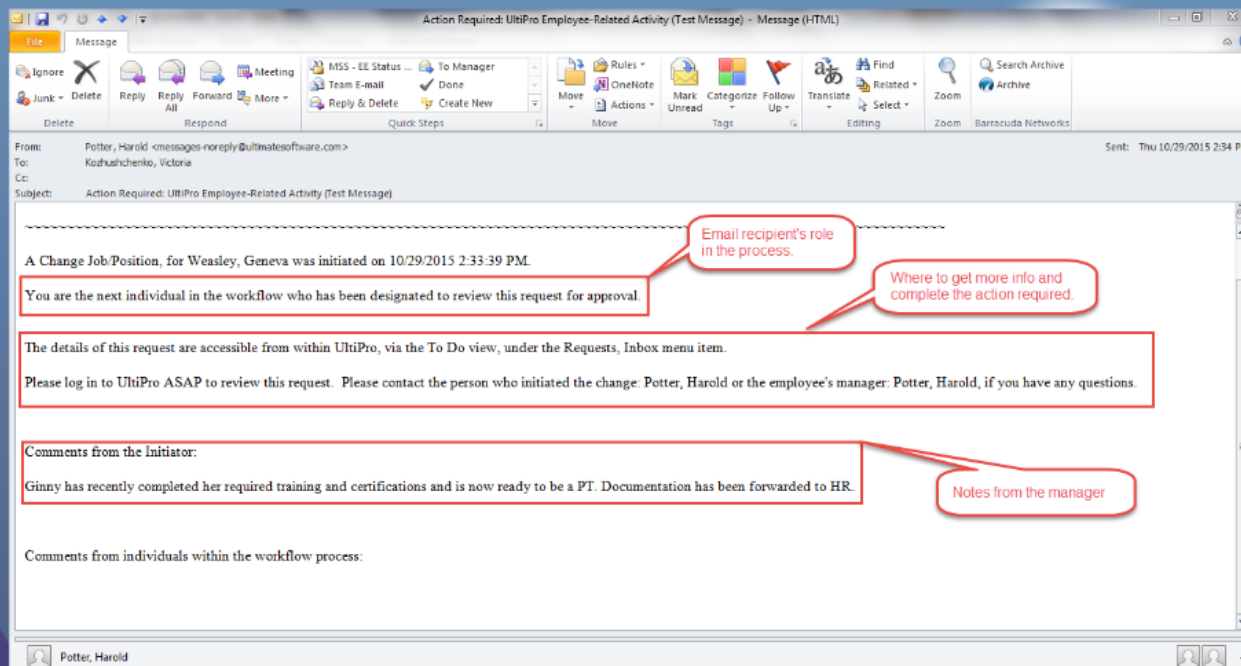
Approver Level 3

Comments

Request Information

Show

Workflow In Action: Notification Email



Notification Email

Action Required: UltiPro Employee-Related Activity (Test Message) - Message (HTML)

From: Potter, Harold <messages-noreply@ultimatesoftware.com>
To: Kozhushchenko, Victoria
Cc:
Subject: Action Required: UltiPro Employee-Related Activity (Test Message)

Sent: Thu 10/29/2015 2:34 PM

A Change Job/Position, for Weasley, Geneva was initiated on 10/29/2015 2:33:39 PM.

You are the next individual in the workflow who has been designated to review this request for approval.

The details of this request are accessible from within UltiPro, via the To Do view, under the Requests, Inbox menu item.

Please log in to UltiPro ASAP to review this request. Please contact the person who initiated the change: Potter, Harold or the employee's manager: Potter, Harold, if you have any questions.

Comments from the Initiator:

Ginny has recently completed her required training and certifications and is now ready to be a PT. Documentation has been forwarded to HR.

Comments from individuals within the workflow process:

Potter, Harold

Annotations:

- Email recipient's role in the process.
- Where to get more info and complete the action required.
- Notes from the manager

Workflow In Action: UltiPro In Box

The screenshot displays the UltiPro web application interface. At the top, there is a navigation bar with tabs for 'Myself', 'My Team', 'My Company', 'Reporting', and 'Recruitment'. Below this is a search bar and a 'Find...' button. The main content area is titled 'Requests' and features a dropdown menu for filtering requests by status. The 'Completed' status is selected. A date range filter is set from '08/03/2015' to '08/27/2015'. The table below shows a single record for a request initiated on '08/24/2015 12:21:56 PM' by 'Harold Potter' for 'Geneva Wesley'.

				Initiated		Status	
Initiated	Type	Description	Priority	For	By	Approval	Update
08/24/2015 12:21:56 PM	Manager	Change Name, Address, or Telephone	Normal	Geneva Wesley	Harold Potter	Approved	Passed

UltiPro In Box

File Edit View History Bookmarks Tools Help

HR Software & HR Payroll ... x UltiPro Community - Enter... x UltiPro Tasks and Processes x Case: 05783364 ~ UltiPro C... x Harold Potter - 000200407 ... x +

https://nz13.ultipro.com/default.aspx# percentage calculation

Most Visited LinkedIn Gmail OWA CH Online 2.0 Kronos Human Resource Exec... Elsevier EPM Login Merrill Lynch BenefitWallet CH BenefitsView UltiPro TEST GoToMeeting UltiPro Citrix

Harold Potter Home Inbox Share Ideas Help Logout

Myself My Team My Company Reporting Recruitment Find...

Inbox Out of Office

Requests

print help

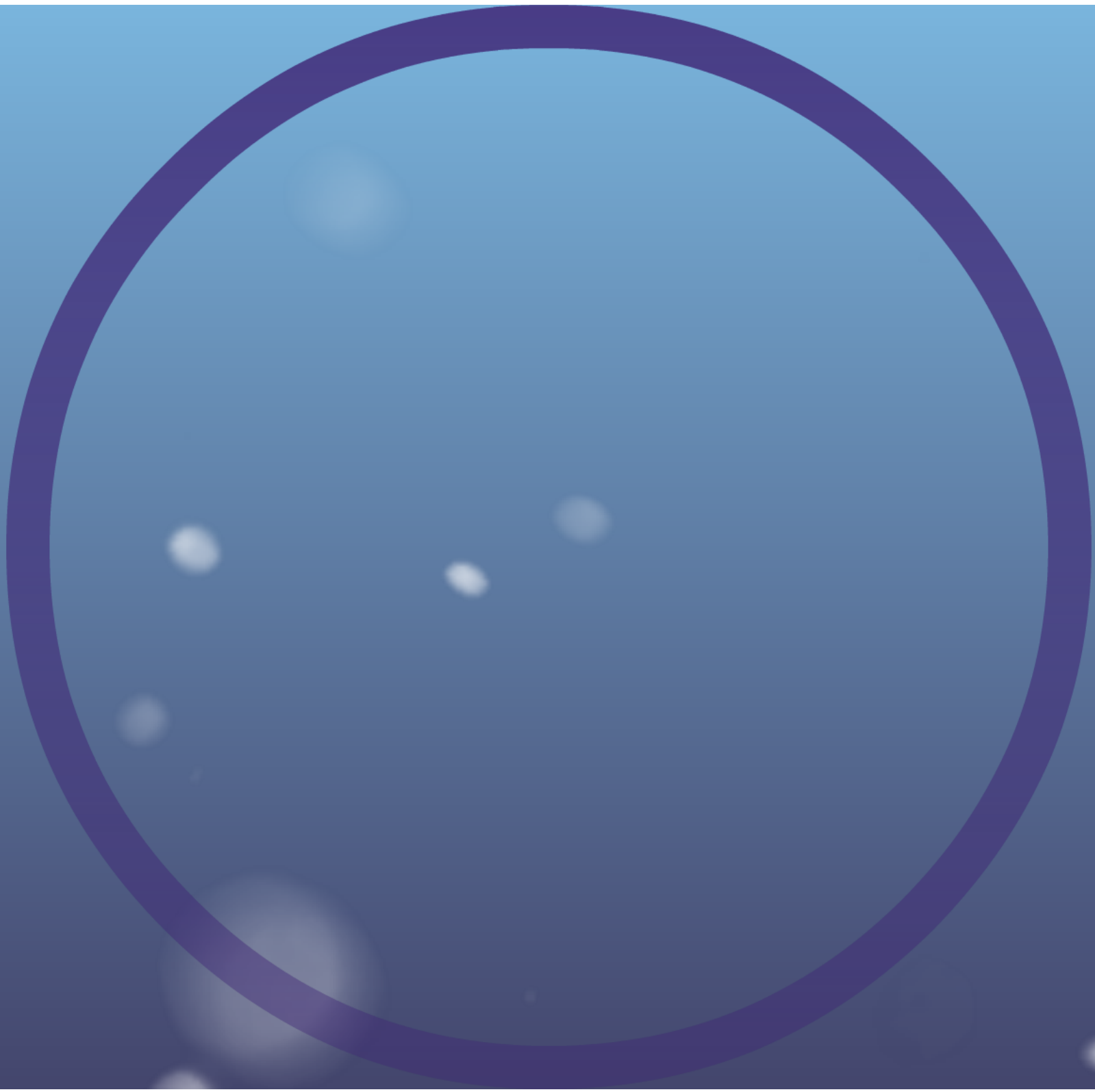
Requests

Completed
Completed
In progress
Pending approvals
To do

Find by Initiated date range From 08/03/2015 To 08/27/2015 Search

Filtered by Initiated date range is between 08/03/2015 and 08/27/2015 [Clear Filters] Displaying all records

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	Type	Description	Priority	For	By	Approval	Update
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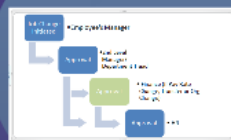
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