UltiPro® — A Comprehensive People Management Solution

Built on the belief that people are the most important ingredient of any business, Ultimate Software's award-winning UltiPro enables organizations to put their people first—helping them build the people-centric environments they need to grow and meet their business goals.

Conveniently delivered on-demand as Software-as-a-Service in the cloud, UltiPro provides comprehensive human capital management (HCM) functionality including recruitment, onboarding, payroll, payment services, benefits, compensation management, performance management and reviews, succession planning, career development, time and attendance/workforce scheduling, plus a role-based Web portal that provides instant access to information and strategic tools to perform business activities more effectively. And it's global. UltiPro delivers one system of record to consolidate, manage, and analyze worldwide workforce information. Data is available across all areas of HCM — by department, division, country, and more — in an instant for fast reporting and analysis. UltiPro helps unleash greater business potential and strategic capabilities for HR. That translates into better service for your most important asset — your people.
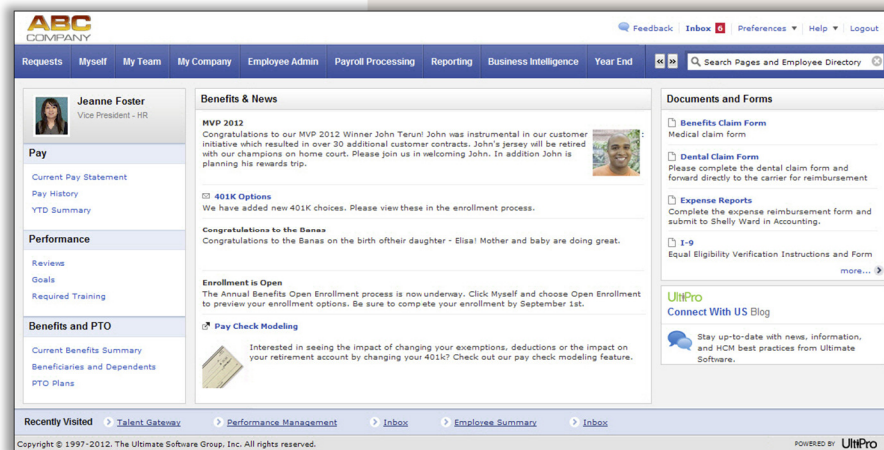
Business/Employee Portal

The UltiPro portal keeps everyone in your organization connected and empowers your workforce to operate at peak efficiency. A seamless, single-user experience, the portal provides your people with the most important information relevant to their roles within the business — from employees reading company policies, checking personal and pay information, and downloading commonly requested forms to managers completing tasks from their inbox, reviewing resumes, and monitoring important metrics with dashboards. The UltiPro portal:

The UltiPro portal is a central gateway providing each employee with access to corporate information and strategic tools.

- Helps improve communications and increase employee satisfaction by sharing important news and business objectives with your entire workforce
- Increases productivity by providing manager and HR/payroll access to critical information and the tools needed to manage staff and perform business activities more efficiently
- Eliminates day-to-day inquiries to HR and payroll by allowing employees to access their own pay, benefits, and HR details
- Helps your organization stay on top of key metrics and business trends with real-time access to commonly requested reports and analytics across any component of HCM
- Delivers a positive user experience by allowing your people to select personal preferences that are "sticky" — recalling individual settings each time the user logs in, including preferred language and the order and placement of content

Human Resources

UltiPro automatically tracks all HR-related information, including employment history, performance, job and salary information, career development, and more for all employees in one system of record. UltiPro also makes it easy to record key information for government compliance and reporting in North America. You can manage COBRA compliance, HIPAA certificates, OSHA and workers' compensation, FMLA tracking, and EEO compliance; meet the HR requirements of the Canada Labour Code and/or provincial/territorial employment standards legislation; and remain compliant with United States and Canadian legislation for protecting sensitive data such as employee social security or social insurance numbers.

Global HCM

UltiPro gives organizations one system of record to unify their worldwide workforce. Track employees' personal, job, salary, benefits, and other HR information for multiple countries; make employee contact information visible to the multi-national workforce; and view compensation information globally.
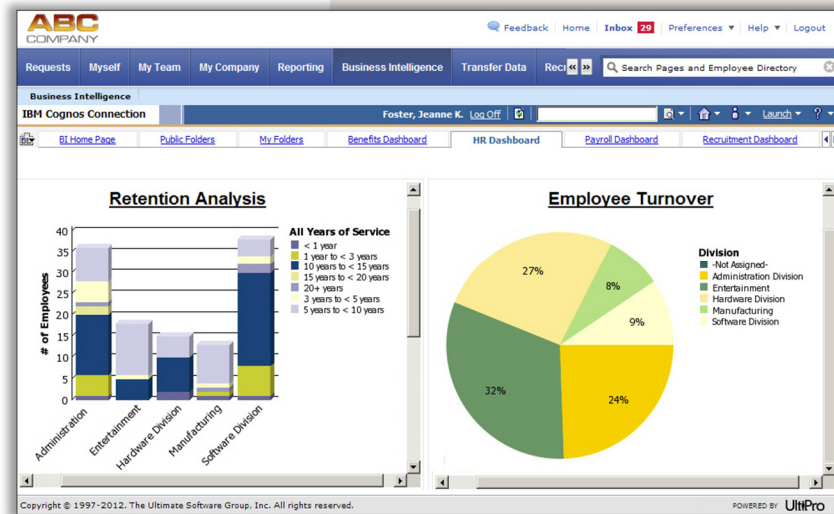
UltiPro Global HCM also provides complete visibility into your global employees' benefits and compensation information for quick analysis and decision making. Quickly and easily access vital reports and analytics — either by individual country or the entire company as a whole.

Workforce Analytics and Reporting

UltiPro's reporting and business intelligence tools help you gain complete visibility and insight into your workforce by letting you pull data across all areas of your people management solution, including HR, payroll, benefits, tax, recruitment, performance and more, to capture key metrics in an instant.

Role-based access to reporting, query, and analysis tools as well as real-time alerts and dashboards help everyone on your team, from line managers to executives, stay on top of business needs — instead of just reacting to them. With UltiPro, you can:

- Analyze workforce metrics such as turnover trends and benefits costs
- Access commonly requested reports on headcount, recruitment activity, average salary, general ledger reporting, and more
- Use dashboards to view critical information right on your desktop
- Proactively send alerts, for example, on issues like upcoming performance reviews or overtime amounts
- File signature-ready forms to comply with U.S. and Canadian legislative requirements

UltiPro's reports and analytics provide business insight to help you make better decisions.

Payroll Administration and Tax Management

The most flexible, functional payroll engine on the market, UltiPro does it all, handling hundreds of payroll-related computations in U.S. and Canadian dollars with no need for side calculations or expensive programming. For example, complex wage calculations delivered include average pay rates for overtime calculations, shift premiums, garnishments, and levy calculations.

With UltiPro, your central payroll department, remote offices, or multiple divisions can process U.S. and Canadian payroll from start to finish from the UltiPro portal in a few easy steps, including:

- Automatically retrieving time and attendance data for payroll processing
- Calculating pay (including gross-to-net)
- Generating direct deposit files, pay checks, and direct deposit advices for U.S. and Canadian banks
- Issuing off-cycle checks or voiding payments instantly
- Tracking the progress of the payroll online

For fast and efficient processing, UltiPro delivers a Payroll Gateway — one-click access to all of your payroll data. From a central location, you can view your payroll calendar and pay dates, select a pay group for payroll processing, check payroll setup, review processing status and payroll results, and access reports. Plus, you can simplify the payroll process, configuring your own payroll models by bundling a series of payroll steps into one.

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UltiPro delivers all U.S. federal, state, and local and Canadian federal and provincial/territorial tax updates automatically every quarter as part of the core solution, so you don't have to pay for or work with a third-party tax service. UltiPro's comprehensive tax management system helps you handle tax compliance and computations, including multi-state taxing rules and reciprocity, as well as taxation wage accumulation and withholding requirements.

Benefits Administration, Open Enrollment, and Life Events

You can tailor UltiPro to match all of the health, welfare, dental, vision, and other benefits that your organization offers its employees, set up and administer benefit plans, and allow employees to check benefits options and coverage online. UltiPro eliminates the need for duplicate rules, duplicate data entry, and reconciliation reporting because it stores details for deductions and benefits plans in one common table. This includes rules for coverage, premium and employer match computations, and eligibility and participation determination.

UltiPro Open Enrollment significantly reduces the time and expense associated with administering employee benefits with paper enrollment. By automating the open enrollment process online, UltiPro minimizes paperwork for HR and benefits professionals, plus helps you cut costs and go "green" by eliminating the need to print and distribute tedious forms. Employees review benefits options and make elections from anywhere via the UltiPro portal. Benefits administrators enjoy easy setup of open enrollment sessions, including the flexibility to customize content and messages for employees. Administration tools allow HR or benefits managers to monitor session progress at any time. With UltiPro, you gain a smooth and efficient open enrollment process that delivers substantial time and cost savings.

UltiPro Life Events simplifies making life-event benefits changes by allowing employees to update their own benefits and personal information online. The intuitive solution guides employees through all the steps of making life event changes, such as getting married, having a baby, or moving — with no paperwork or calls to HR.
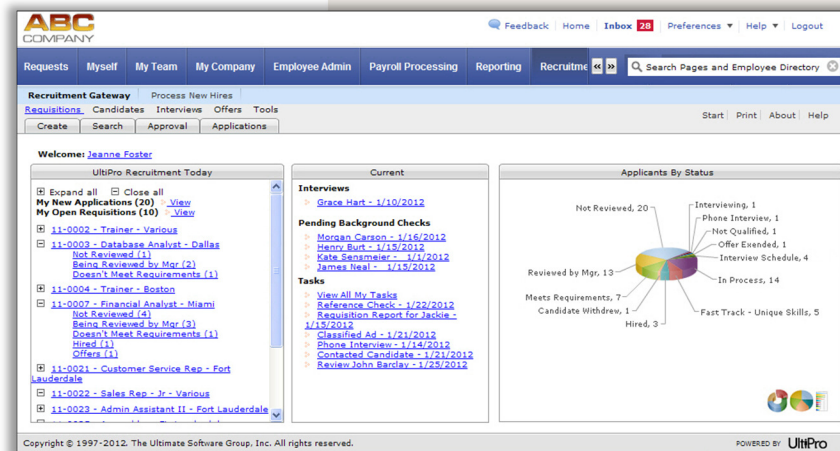
Recruitment

UltiPro Recruitment accelerates the recruiting process and makes it easier than ever by streamlining and automating all of the activities associated with finding and acquiring top talent. The solution boosts productivity and reduces the length of the recruiting cycle by enabling managers, recruiters, and HR staff to track and manage tasks such as posting open jobs, reviewing resumes, screening candidates, scheduling interviews, conducting background checks and more — right from the UltiPro portal, saving significant time and minimizing overall recruitment and hiring costs.

The "Recruitment Gateway" lets you view and manage all of your recruiting activities in one place.

With UltiPro Recruitment, you attract and hire the most qualified candidates and put yourself in a proactive position to align recruiting and staffing activities with your organization's overall goals and talent plan.

Onboarding

UltiPro Onboarding automates and simplifies the process of assimilating a new employee into your organization. When an employee is hired, Onboarding helps you manage the logistical details — providing a desk, phone, computer, etc. — that need to be completed before the new hire's first day of work. Using an online onboarding package that you create, new employees follow a step-by-step guide to walk them through the orientation process including required government and procedural forms (with electronic signatures). By providing a positive onboarding experience, you quickly turn new hires into productive employees, increase employee satisfaction, and enhance engagement within your company—all while reducing labor costs and saving time for your HR staff.

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Onboarding also takes the guesswork out of hiring a legal workforce by allowing you to conduct employment verification using the U.S. Citizenship and Immigration Services and the Department of Homeland Security's E-Verify® program. Because Ultimate is a designated E-Verify program agent, you can validate a new hire's I-9 information against U.S. government databases. Results are returned in minutes, including appropriate action for both eligible and ineligible employees.

Performance Management

UltiPro Performance Management lets you assess performance and gather feedback on an ongoing basis — instead of once a year — to get the best results out of your employees. The solution helps you understand employee competencies, identify and reduce gaps, and plan for future workforce needs. You can create a pay-for-performance environment that rewards your top performers. You can also establish competency-based employee development goals, assess performance against measurable objectives and review progress at any time, identify high-performing employees for key positions, and collect multi-contributor feedback for a full picture of an employee's performance. The result is better talent retention and better business results for your organization.

Succession Management

With UltiPro Succession Management, you can create an executable strategy for professional growth and career advancement within your organization. The solution provides you with the ability to effectively engage with your employees to define their career paths and ensure they develop the skills, knowledge, and other talent factors necessary for personal growth and contribution to your company's success. By uncovering talent gaps, identifying high-performing individuals, understanding retention risks and assisting employees in obtaining their "readiness" to step into key roles, you reduce your risk of business disruption.
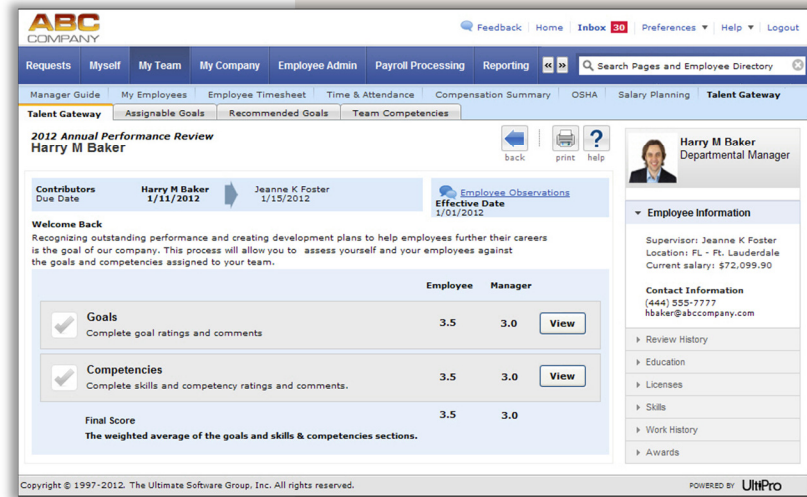
Career Development

UltiPro Career Development arms you with the tools needed to chart employee professional growth and effectively manage development opportunities to assist employees in obtaining the skills, knowledge, and qualifications required for subsequent roles. By bringing development opportunities to employee and manager desktops, UltiPro empowers your people to take more responsibility and control over their own career aspirations, plus, provides managers with the information they need to make smart decisions about staff development needs.

Compensation Management

UltiPro helps you retain quality employees because it enables you to better manage compensation and keep increases and incentives in line with employee performance. UltiPro Compensation Management helps you regulate merit increases to stay on budget, and tracks and reports on global compensation. You can report on current and planned compensation to ensure that plans are in line with business objectives. UltiPro Compensation Management:

- Streamlines salary planning and the budgeting process
- Provides fast and easy access to detailed job and compensation data
- Delivers a merit matrix to help regulate merit increases to ensure that your actual salary plan is in line with the overall budget
- Supports variable pay plans to help you tie employee compensation to job performance
- Lets you apply salary and wage differentials based on geographical areas associated with particular work locations
- Enables you to analyze compensation data as it relates to factors such as job title and performance and variable pay plans
- Allows you to track and report on global compensation

From one central location, you can see an employee's complete performance history and drill in to see details.

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Salary Planning and Budgeting

UltiPro Salary Planning and Budgeting facilitates salary increase administration by delivering the tools and information managers need to make effective decisions regarding future compensation for individuals and/or an entire team. Highly configurable, UltiPro Salary Planning and Budgeting makes it easy for you to tie your company's salary-increase process and business rules into the solution.

Working online, managers can rapidly review salary budgets and guidelines, and determine the best way to allocate pay increases to their employees within their approved budget. Once managers decide on the allocations, they can submit pay increases for processing with the click of a button — no manual calculations or spreadsheets required.

Time, Attendance, and Scheduling

Having the right time solution to manage people effectively is important for long-term success. To help customers meet their individual timekeeping requirements, UltiPro offers several solutions for capturing time and attendance information and making the data readily available for payroll processing. UltiPro's time solutions automate time and labor management processes, helping you to increase workforce productivity, reduce payroll errors, and control labor costs. From complex time and labor management, leave management capabilities, and workforce scheduling options to basic time entry via the UltiPro portal, UltiPro delivers a time and attendance solution to meet your needs.

UltiPro iPhone App

The ability to conduct "anytime, anywhere" business is simply a must-have for many companies today. To help you keep pace, UltiPro has extended manager and employee portal access to the Apple® iPhone. A free download for customers from the iTunes Store, UltiPro's iPhone application delivers important workforce information to managers and employees in an instant, for example, making it easy to speed processes for or keep in contact with employees regardless of location or time of day. From their iPhone, managers have immediate access to their UltiPro "Inbox" to approve or deny daily workforce transactions such as salary increases, job changes, and vacation or paid-time-off requests. Employees can use their iPhone to search your company directory, making finding contact information for colleagues a snap from anywhere.

Position Management

UltiPro Position Management helps you manage your resource budget, measure trends, and better forecast the future. Manage by full-time equivalents and dollars, and readily evaluate budgeted versus actual numbers. You always know where you stand with fund allocations, available open positions, and staffing requirements. Because HR and payroll are consolidated in one system, reporting on position information for budgeted and actual does not require multiple spreadsheets.

Tax Filing and Wage Attachment Disbursement

UltiPro Tax Filing guards your business against filing errors by transferring responsibility for remitting tax files and payments to professionals with years of experience. You save time and enjoy freedom from administration and peace of mind that your payroll taxes are paid and filed accurately, on time, every time. UltiPro Tax Filing:

- Deposits federal, state, and local tax liabilities for more than 13,000 tax codes
- Files all monthly, quarterly, and annual tax returns via paper, e-file, or magnetic media
- Balances quarter-to-date and year-to-date deposits to liabilities to ensure payments are accurate
- Researches and responds to agency inquiries
- Provides tax return reports prior to due date for your review
- Delivers reconciliation summaries and copies of all filed returns
- Generates and files all amended returns
- Provides new-hire and multi-worksite reporting to appropriate agencies

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For organizations required to process third-party payments on behalf of employees for items such as child support, tax levies, and creditor garnishments, UltiPro Wage Attachment Disbursement can effectively streamline and manage the payment process.

Wage Attachment Disbursement utilizes the information entered and calculated in UltiPro. There's no need to manage payment processing and analyze varying disbursement schedules for multiple jurisdictions. Each payment is made according to the appropriate payment method and reaches its required destination within the designated timeframe.

Unique System Administration Features

UltiPro system administration is a snap because it's designed for the nontechnical user — no programming experience required. System Administration includes:

- Configuration options that increase usability and allow you to customize the look and content of the UltiPro portal. Brand the portal, establishing your own company's image, by inserting your company logo and defining the colors of your solution. Create unlimited content, including company communications, forms, documents, links to Web sites and other products, and more, and tailor that content by individual, role, department, company, etc. Individual users also can personalize the UltiPro portal by selecting preferences for language (English, Spanish, or French), date format, and placement and order of home-page content.

- Role-based security that protects the privacy of your workforce data by defining system access based on an individual's role within the organization. Employees see only information that is appropriate to their role (or multiple roles).

- Built-in conditional workflow that is flexible, easy-to-use, and designed to make business process changes more efficient. You select the level of approvals required (unlimited) for each type of change and designate the approvers — by individual or role. Business processes and approval path(s) are determined at runtime depending on the conditions specified in the data submitted.

- Flexible business rules that can be updated by authorized HR/payroll staff and system administrators right from the UltiPro portal, including rules such as your company's jobs, organization levels, deduction/benefit plans, loan types, paid-time-off plans, and more.

- A content management tool to quickly and easily create portal content — including text, links to Web sites and email addresses, files, images, and more. A built-in editor allows content to be formatted easily and automatically translated into HTML for portal display.

System Integration and Data Exchange

Ultimate's "open approach" cloud technology offers convenient and secure integration/data exchange tools, such as Web Service APIs and enterprise integration tools, to facilitate data sharing and help you easily connect to third-party systems and service providers.

Additional Services

Ultimate offers a number of additional HR and payroll-related services to extend the value of UltiPro, including:

- Paycheck modeling
- Employment verification services
- Pre-employment screening services
- Unemployment tax management