



UltiPro 2014 Fall/Year-End Release Highlights

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Ultimate Software is pleased to provide you with this high-level overview of the UltiPro 2014 Fall/Year-End Release (v10.8.2).

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INTRODUCTION

Ultimate Software continues to build innovative solutions that put your people in control and at the center of their own work life-cycle. The 2014 Fall/Year-End Release (v10.8.2) strengthens our people-first strategy by expanding UltiPro to foster employee purpose, simplify work, and boost engagement. More than 200 new features and enhancements - including many suggested by our customers - help you develop individual employees by leveraging predictive, data-based analytics, support your global workforce, and easily integrate with other business systems. Additionally, tax and compliance modifications in this release ensure accurate 2014 tax reporting and 2015 payroll tax compliance for the U.S. and Canada.

2014 FALL/YEAR-END RELEASE SCHEDULE

SaaS Customers

Ultimate will apply the Fall/Year-End Release to your environment between November 7 and November 9, 2014. Your SaaS focal contact will receive an email with your specific upgrade date.

Not sure who your SaaS focal contact is? Go to the [Customer Success Portal](#) to verify this information and also change or update any other account details.

STAY INFORMED

Release Notes

For complete details on the enhancements and functionality changes included in this release, Ultimate recommends you review the Release Notes, available October 28, 2014.

Connect With US - Ultimate Software's Primary Source for UltiPro News

Ultimate encourages you to subscribe to Connect With US via email or RSS Feed for additional, real-time information about the Fall/Year-End Release including technical information, learning tools, new initiatives, and more. Click [here](#) to view Connect With US and sign up today.

GLOBAL HUMAN CAPITAL MANAGEMENT

The Fall/Year-End Release brings enhancements to augment and streamline your human resources operations with:

- **Language support.** Additions to UltiPro's portfolio of languages enable you to select German or Dutch as your language of choice when logging in to UltiPro or establishing your Preferences.
- **Organization level code inactivation.** To ensure you are viewing data that is relevant, UltiPro lets you inactivate or hide organization level codes that your organization no longer uses. Once inactive codes are hidden, you see only active organization levels within drop-down menus throughout UltiPro. This eliminates data clutter and allows you to quickly find the organization information you are looking for. In addition, a new report is available that displays all organizational levels for your company or just those you select. With the ability to include certain inactive codes you can access useful historical information associated with your employees.

PAYMENT SERVICES

The Fall/Year-End Release streamlines tax-filing efficiencies by delivering:

- **Automated State Unemployment Insurance (SUI) tax rate updates in your UltiPro environment.** To simplify tax filing processes and help you avoid variances at quarter-end, SUI tax rate updates are handled for you automatically in UltiPro by Payment Services - in real-time - at the direction of states' agency rate exchanges or changes you submit via the Customer Success Portal. You are no longer required to maintain your own SUI tax rate updates.

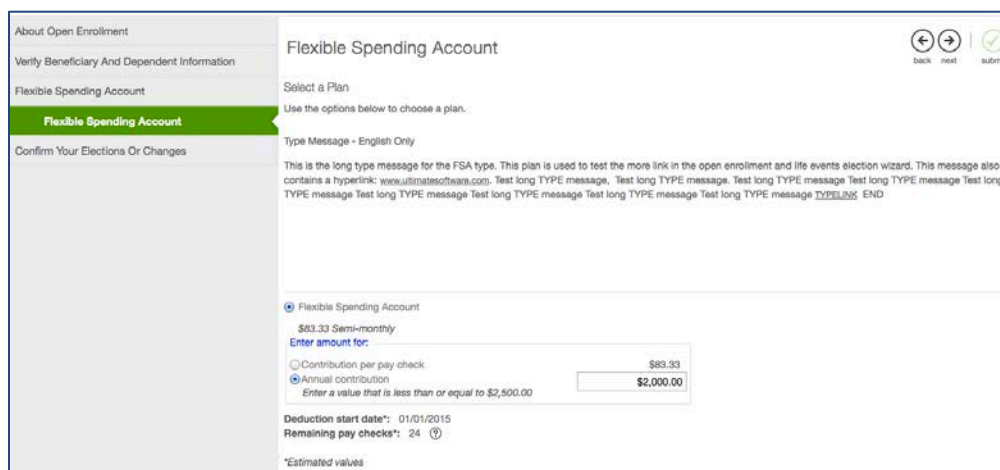
Rate updates in the UltiPro environment are automated and in-sync with Payment Services Tax Filing so SUI tax liabilities are accurately calculated on a per pay period basis.

Note: The SUI rate change notification process is not changing. You will continue to receive an alert via the Customer Success Portal providing full details and access your *Company SUI Contribution Rate Changes* report when a SUI rate change occurs.

BENEFITS ADMINISTRATION

To simplify benefits administration for you and your employees, significant Open Enrollment and Life Event updates deliver:

- **Expanded Goal Amount features.** Modifications to Open Enrollment and the enhanced Life Events extensively improve your experience when establishing deduction/benefit plans with goal amounts, such as Flexible Spending Accounts (FSA), Health Savings Accounts (HSA), and 401(k) plans.



Updates to yearly and continuing goal plan calculations address the real-life scenario that the frequency in which employees are paid can differ from when deductions are withheld by considering:

- Pay timing
- Deduction timing
- The number of pay periods remaining in the year
- An employee's year-to-date contribution for that particular plan

During an Open Enrollment session or when enrolling mid-year due to a Life Event change, employees can enter either a per pay period or annual goal amount; they don't have to enter both. The value an employee inputs for one automatically calculates and populates the other (per paycheck or annual contribution). For:

- Open Enrollment -
 - Calculations are based on a full-year deduction frequency, and
 - Deduction start dates are defined by the session setup and the Deduction Start Date rule within Deduction/Benefit Plan Coverage business rules.
- Life Events -
 - Calculations respect that yearly goal plans have an end date of December 31, and
 - Continuing goal plans are based upon the plan year begin date.

To learn more about the enhanced Goal Amount features, [click here](#) to review a recorded webcast.

- **User experience enhancements.** The left-hand navigation panel aligns with UltiPro's overall look and feel and provides clearer labels for your employees.
- **Deduction/Benefit business rule warnings.** A helpful alert warns you to consider the negative impact to an Open Enrollment/Life Event session when you:
 - Select "Allow multiple deductions"
 - Change a benefit type
 - Remove a deduction/benefit plan
- **Automatic annual plan limit updates.** Open Enrollment and Life Event sessions respect annual limits for deduction/benefit plans with goal amounts when you update the limits yourself. Plan limits usually increase year over year and you can now set higher limits using the Deduction/Benefit Plan business rule after limit changes are published and UltiPro tax categories are updated. This way, the limits you specify are respected when your employees go through Open Enrollment for the new year.
- **Life Event change reason messages.** Include a description or instructions within a Life Event to provide clarity and help your employees take the appropriate next steps. Simply use the new *Life Event Reason* field within the Change Reason business rule to add, for example, "I have a child" and/or list out what employees should do next under "I have a qualifying event."
- **CANADA! Employer calculation rule support in the portal.** The Canadian employer deduction/benefit calculation rules - Amount, Per Pay Cap, and Annual Cap - are now supported via the UltiPro portal. Also, going forward, any calculation rule changes you make are supported and your payroll is not impacted when you modify deduction/benefit plan business rules.

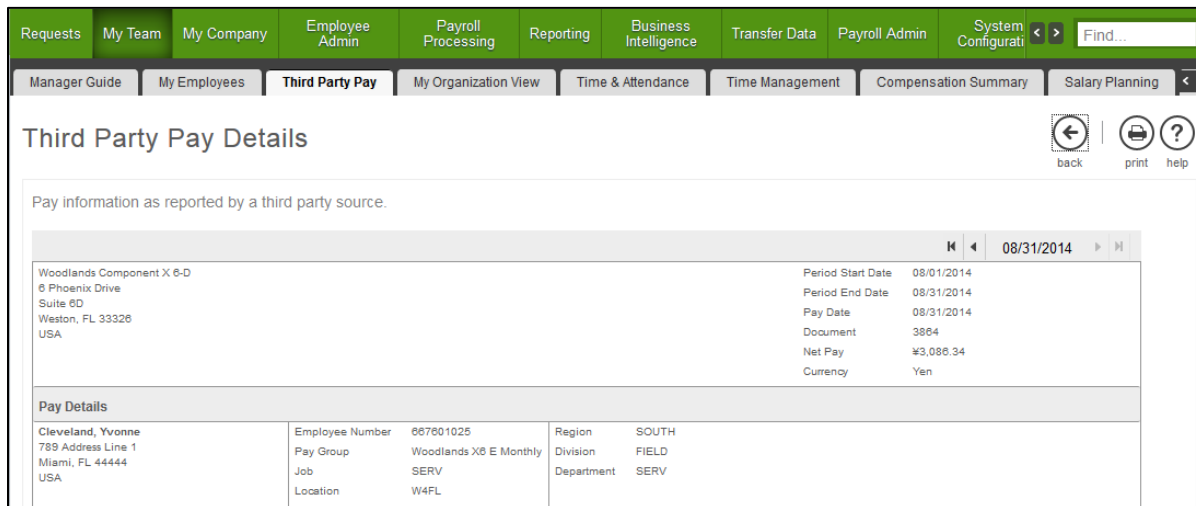
HUMAN CAPITAL MANAGEMENT FOUNDATION

Enhancements with the Fall/Year-End Release help you effectively manage payroll across the globe and remain tax compliant.

PAYROLL

Payroll processing updates deliver:

- **The Time Entry worksheet.** Use the new Time Entry worksheet for faster data entry of employee earnings and deductions before payroll is processed.
- **Access to view pay details from another vendor.** Employees can view pay information - such as current check details paid from a third-party (earnings/deductions processed by Celergo and imported into UltiPro for multinational workers, for example), payroll history, and a year-to-date pay summary - from a new Third-Party Pay Details page. In addition, a Third-Party Pay Web Service enables you to use this page to exchange this payroll data between UltiPro and third-party vendors.



The screenshot displays the UltiPro 2014 Fall/Year-End Release interface. The top navigation bar includes tabs for Requests, My Team, My Company, Employee Admin, Payroll Processing, Reporting, Business Intelligence, Transfer Data, Payroll Admin, and System Configuration. Below this, a secondary navigation bar shows Manager Guide, My Employees, Third Party Pay (selected), My Organization View, Time & Attendance, Time Management, Compensation Summary, and Salary Planning. The main content area is titled "Third Party Pay Details" and includes a "back" button, a "print" button, and a "help" button. The page displays "Pay information as reported by a third party source." and a date selector for 08/31/2014. The main data table shows the following information:

Pay Details	
Woodlands Component X 8-D 6 Phoenix Drive Suite 6D Weston, FL 33326 USA	<div> <div>Period Start Date</div> <div>08/01/2014</div> </div> <div> <div>Period End Date</div> <div>08/31/2014</div> </div> <div> <div>Pay Date</div> <div>08/31/2014</div> </div> <div> <div>Document</div> <div>3864</div> </div> <div> <div>Net Pay</div> <div>¥3,088.34</div> </div> <div> <div>Currency</div> <div>Yen</div> </div>

Pay Details	
Cleveland, Yvonne 789 Address Line 1 Miami, FL 44444 USA	<div> <div>Employee Number</div> <div>667601025</div> </div> <div> <div>Pay Group</div> <div>Woodlands X8 E Monthly</div> </div> <div> <div>Job</div> <div>SERV</div> </div> <div> <div>Location</div> <div>W4FL</div> </div> <div> <div>Region</div> <div>SOUTH</div> </div> <div> <div>Division</div> <div>FIELD</div> </div> <div> <div>Department</div> <div>SERV</div> </div>

GLOBAL PAYROLL SUPPORT IN PARTNERSHIP WITH CELERGO

Ultimate's strategic partnership with leading global payroll provider Celergo continues to provide payroll capabilities and seamless integration so you can easily exchange relevant data for employees in 32 countries. Expanded global features support:

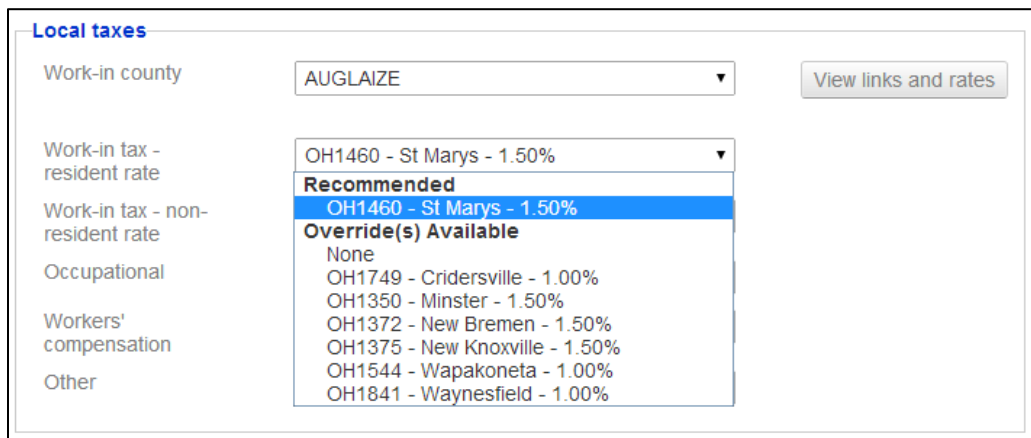
- **Payroll integration for three additional countries.** To further help you process payroll for a worldwide workforce, you can send important information to local payroll providers for your employees in Indonesia, Qatar, and Vietnam.
- **Pay and deduction information.** You can now enter basic pay and deduction information to be transferred to local payroll providers for your global workforce.
- **International bank accounts.** To support direct deposit payments, you can set up bank accounts for your global employees. UltiPro supports country-specific bank account number formats, and required fields are determined, based upon unique localizations, to ensure you meet specific data requirements and compensate your people properly.

TAX COMPLIANCE

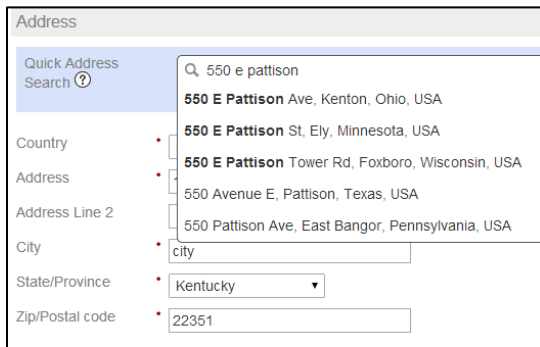
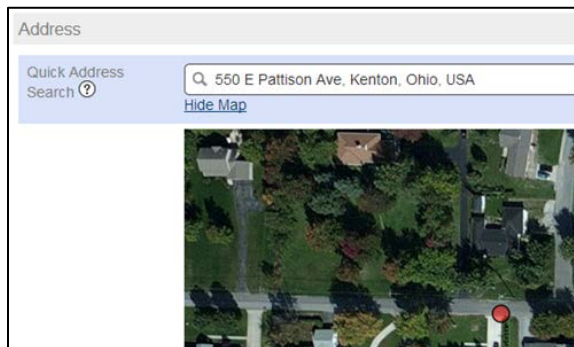
The Fall/Year-End Release delivers compliance updates and functionality that include:

- **Smart Tax Search tool.** To reduce the complexities and errors associated with assigning taxes in the United States, a new tool, called Smart Tax Search, automatically determines the correct federal, state, and local payroll tax, based on where an employee lives and works, and significantly streamlines attributing the right tax categories to the right employees. Smart Tax Search simplifies your administrative processes, saves time, and increases the quality and accuracy of your data for locations business rules and the following work events:
 - New Hire
 - Transfer Employee
 - Change Name, Address, or Phone (for administrators and employees)
 - Change Resident Taxes Wizard
 - Change Income Tax (for Pennsylvania residents)

With Smart Tax Search, UltiPro automatically provides all applicable tax codes - associated with U.S. company location and employee setup/changes - for you to accept, and assign to an employee, or override.



A new Quick Address Search provides type-ahead functionality, delivering specific location and tax code information to you. As you type in content within the search box, simply select the complete address from a drop-down list; or, view and navigate the location on a map.

Additionally, Ultimate recommends you take advantage of Smart Tax Search multi-level approver and workflow configuration capabilities, which makes it easy to assign certain responsibilities to the appropriate persons(s) within your organization. For example, when an employee submits a home address update, you can ensure your HR administrator approves this change and your payroll administrator follows with approval of the tax updates associated with the address change.

Stay tuned! Watch [Connect With US](#) for a webcast invitation to demo and learn everything you need to know about the new Smart Tax Search feature.

- **Multi-child support allocation.** When multiple child support allocations are associated with an individual employee, UltiPro automatically allocates deductions based on state legal requirements and the employee's disposable income. However, if you have the allocated amounts set up as a deduction already, an option to override this feature is available so system-generated multi-child support allocations do not occur.
- **CANADA! French language support for tax reporting.** A total of sixteen standard tax compliance reports - for Tax Liability, Pensionable and Insurable Earnings Review, Workers Compensation, Payroll, and Employee Birthday Listing - are now available in Canadian French for our customers in Quebec or those who prefer to view reports in Canadian French.
- **U.S. statutory updates.** Federal and state forms and possessions - such as Form W-4, W-2, 1099-MISC, and 1099-R - have been updated to meet 2014 statutory requirements (except Puerto Rico).

Notes:

- Release Notes for the UltiPro 2014 Fall/Year-End Release are available on October 28, 2014. It is recommended that you review the Release Notes as they contain complete details, including any late-breaking compliance updates, included in this release.
- Many payroll tax changes are finalized by government tax authorities in late November and December with effective dates of January 1. Because of this, Ultimate will issue:
 - A Fourth Quarter Service Pack in December
 - A Tax Reporting Service Pack in January to support 2014 reporting and prepare for 2015
 - Additional tax updates as necessary when new requirements from tax jurisdictions become available

TALENT MANAGEMENT

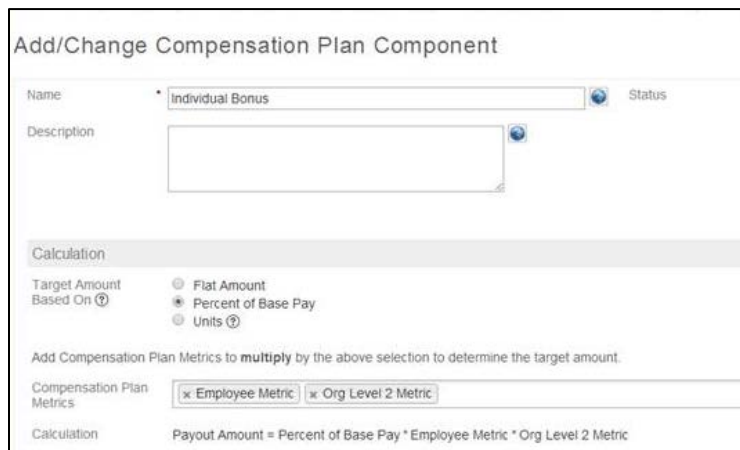
More robust talent capabilities make it easy for you to develop and retain your employees as well as appropriately reward them using the new Compensation Management solution.

COMPENSATION MANAGEMENT

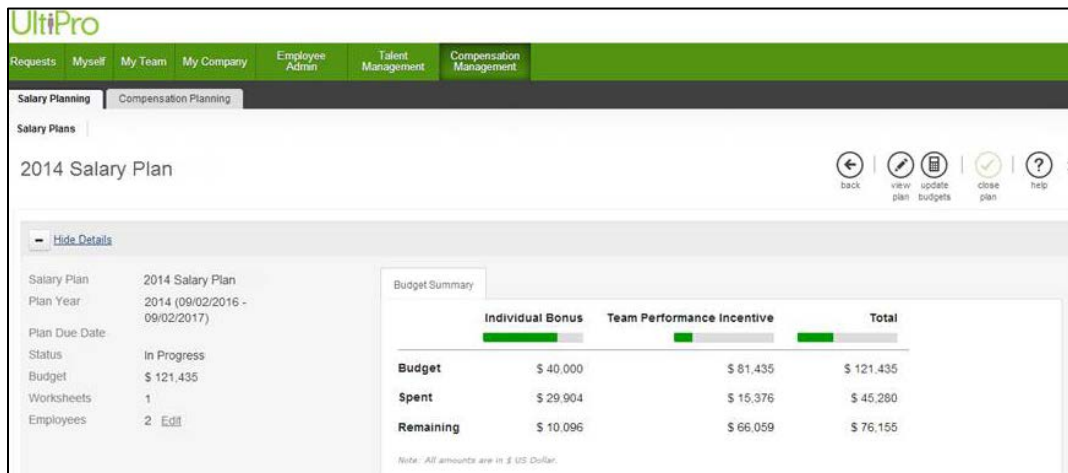
New Compensation Management features enable you to effectively calculate:

- **Compensation Plan Payouts.**

When building a compensation plan, you can define compensation components and metrics - at different levels - so that one-time payouts automatically generate for your employees. For example, when your company's sales revenues reach a targeted goal, employees receive their bonuses as determined by the calculations and parameters you specify. The payouts immediately transfer to payroll to be included on an employee's paycheck.



- **Bonus allocations.** Additional bonus calculation options are available within UltiPro that allow you to enter or import various metrics on the department and/or employee level - no more manual calculations and data entry. Once you set organization-specific calculation parameters, UltiPro automatically outputs a bonus pool that managers can allocate to employees from within the salary planning worksheet.



	Individual Bonus	Team Performance Incentive	Total
Budget	\$ 40,000	\$ 81,435	\$ 121,435
Spent	\$ 29,904	\$ 15,376	\$ 45,280
Remaining	\$ 10,096	\$ 66,059	\$ 76,155

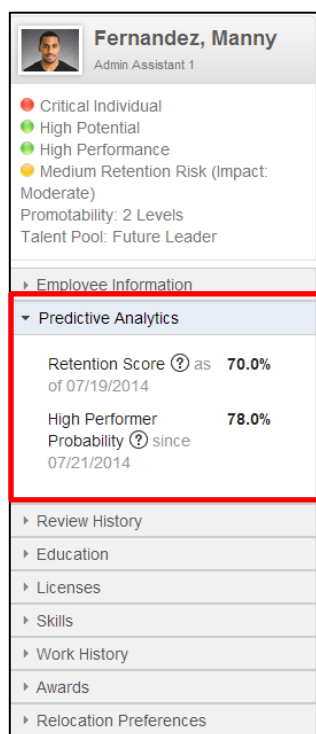
Note: All amounts are in \$ US Dollar.

PERFORMANCE MANAGEMENT

The Fall/Year-End Release expands talent analytics and delivers configuration and user experience enhancements to help you effectively evaluate and guide your employees' professional growth. Updates include:

- **High-Performer Predictor™.** UltiPro is taking predictive analytics to the next level with a second insight-driven predictive analytics tool (complementing the award-winning UltiPro Retention Predictor™). The High-Performer Predictor identifies the potential for an employee to become a high-performer within your company. Calculations expand upon existing High-Performer Indicator algorithms but do not require 2 years of employment - so all of your employees receive a score.

For easy reference without having to run a report, UltiPro adds a new Predictive Analytics section on an employee's Talent Card and under Talent Factors and Succession Comparison. Predictive Analytics display the high-performer score along with the Retention Predictor™ rating and High-Performer Indicator™ (if applicable) to help you properly plan and take early action to retain rising high-performing employees and increase both individual and business performance.



Fernandez, Manny
Admin Assistant 1

- Critical Individual
- High Potential
- High Performance
- Medium Retention Risk (Impact: Moderate)
- Promotability: 2 Levels
- Talent Pool: Future Leader

Employee Information

Predictive Analytics

Retention Score ⓘ as of 07/19/2014 **70.0%**

High Performer Probability ⓘ since 07/21/2014 **78.0%**

Review History

Education

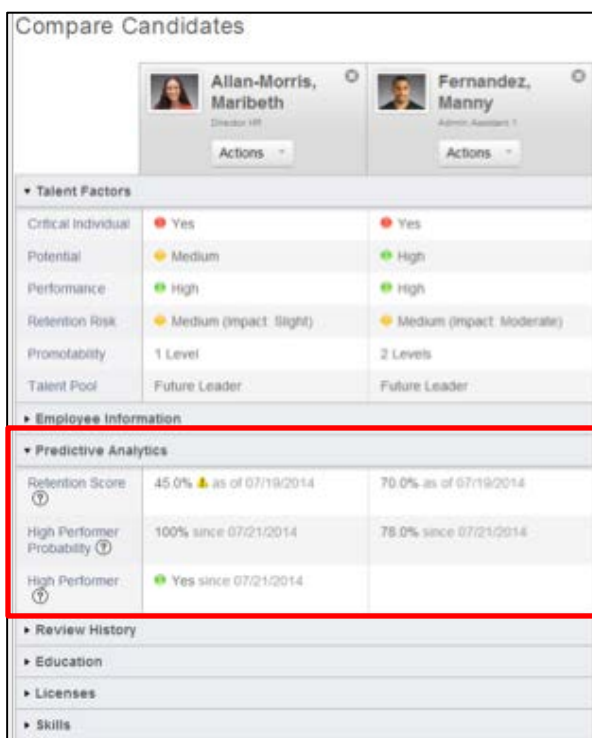
Licenses

Skills

Work History

Awards

Relocation Preferences



Compare Candidates

Allan-Morris, Maribeth
Director VIII

Fernandez, Manny
Admin Assistant 1

Talent Factors

Critical Individual	Yes	Yes
Potential	Medium	High
Performance	High	High
Retention Risk	Medium (Impact: Slight)	Medium (Impact: Moderate)
Promotability	1 Level	2 Levels
Talent Pool	Future Leader	Future Leader

Employee Information

Predictive Analytics

Retention Score ⓘ	45.0% ⓘ as of 07/19/2014	70.0% as of 07/19/2014
High Performer Probability ⓘ	100% since 07/21/2014	78.0% since 07/21/2014
High Performer ⓘ	Yes since 07/21/2014	

Review History

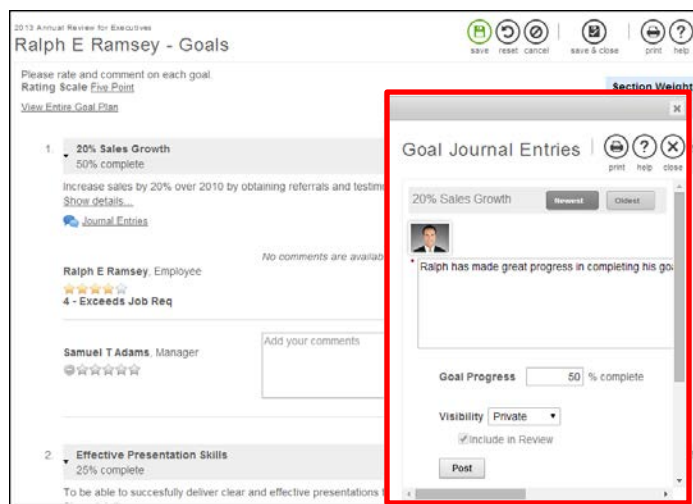
Education

Licenses

Skills

- **Goal date configuration capabilities.** A result of customer requests, you can configure UltiPro to require goal start and due dates in areas where you are able to add/change goals. This gives managers greater administrative control and better equips them to manage employees' individual, assignable, corporate, and recommended goals.

- **User-experience enhancements.** When completing a Performance Review, you have the flexibility to:
 - Save and continue your work - and stay on the same page where you left off - as well as save and close your work, which takes you back to the Review Summary.
 - View goal journal entries within a new pop-up pane, making it easy to see as well as copy/paste day-to-day comments tied to a goal or competency and allowing you to provide a better evaluation while working on an employee review.



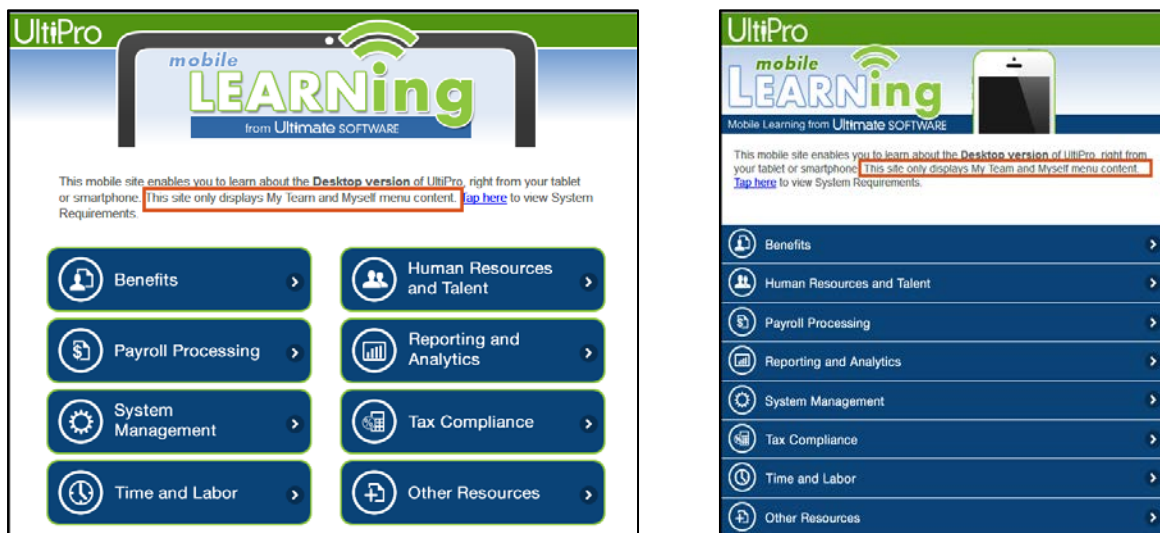
BUSINESS INTELLIGENCE

The Fall/Year-End Release continues to provide greater access and insight into your important people data:

- **Reporting support for:**
 - **Personal development plans.** You are able to report on goals, competencies, and/or career development opportunities included in an employee's development plan. This added insight on performance review information helps you locate trends and identify and analyze certain elements that may be linked to employee success.
 - **HCM organizational level reporting.** In addition to the new feature allowing you to inactivate organization level codes, you can now generate a report that displays all organizational levels for your company or use them selectively. With the ability to include certain inactive codes in Business Intelligence report prompts, you can access useful historical information associated with your employees.
- **Expanded browser support.** To better align with the web platforms you currently use, you can now author Business Intelligence reports in versions of Google Chrome certified as compatible with UltiPro.

MOBILE

The Fall/Year-End Release offers a more engaging UltiPro Mobile experience with **Mobile Learning**. The UltiPro Mobile Dashboard now includes a Learning section that gives you access to Quick Tours and Videos related to the desktop version of UltiPro. You can access these valuable learning tools from your tablet or smart phone. The Quick Tours and Videos available are based on manager or employee role type to help them answer their own questions and increase proficiency using UltiPro.



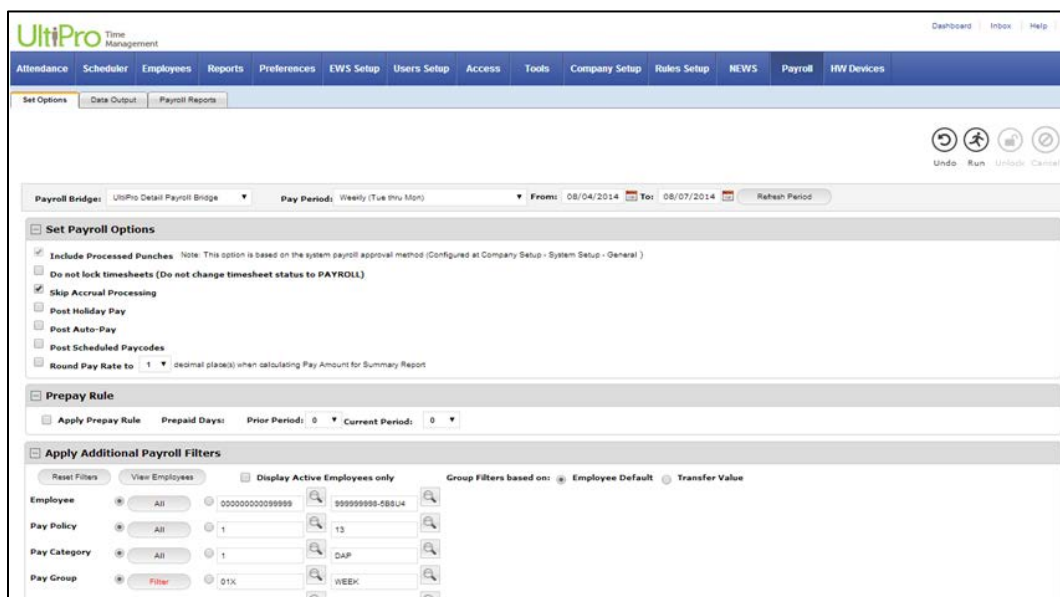
TIME MANAGEMENT

The Fall/Year-End Release further supports a seamless integration between your Time Management solution and UltiPro with enhancements that include:

- **Automated payroll processing.** Design and navigation enhancements that align with the contemporary look of UltiPro provide payroll processing flexibility while significantly expanding your payroll capabilities.
 - Updated pages - labeled Set Options, Data Output, and Payroll Reports - clearly display information and enable you to automate the rapid transfer of your payroll data from Time Management to UltiPro.
 - A new, faster payroll processing method, called Direct, delivers payroll import features so you can add specific employee payroll files straight from Time Management into the UltiPro Payroll Gateway - without having to save them to your local desktop. To improve your administrative efficiencies, you are able to:
 - View all payroll files available
 - Apply and/or group additional filters so that you view employees, for example, by pay policy, category, and/or group
 - Set options, such as include 'Post Holiday Pay,' when you prepare payroll
 - Select one or multiple payroll files for direct import

Not only is it easier for you to process files, but you can delete and resend them to the Payroll Gateway, for example, if you accidentally select the wrong files.

Of course, if you're not ready to change your administrative processes, simply continue the payroll data import method you are accustomed to, called Classic, where you download your payroll output file to your local computer and later import information into UltiPro. Now, you can choose how to process your payroll.



- **Timeout rules.** To eliminate the hassle of timing out of your solution(s) and allow you to bounce back and forth using Time Management and UltiPro, both solutions remain active when you are. This means that when you are working in Time Management, the portal remains active and vice versa.

SYSTEM MANAGEMENT

Expanded UltiPro administration and security tools give you the flexibility to meet specific business requirements and provide a custom-made UltiPro experience. Fall/Year-End enhancements deliver:

- **Platform Configurability - fully configurable pages.** Ultimate introduced Platform Configurability to allow you to add new, custom fields to the bottom of your existing UltiPro pages. The Fall/Year-End Release significantly expands this feature by giving you the ability to fully configure the following UltiPro work event pages:
 - Change Name and Address
 - Change Job
 - New Hire (Start, Personal, Jobs/Payroll)
 - Termination

Tailor these work events and create multiple user experiences to ensure you drive the results and outcomes your business requires - without the time and cost associated with customization. You can:

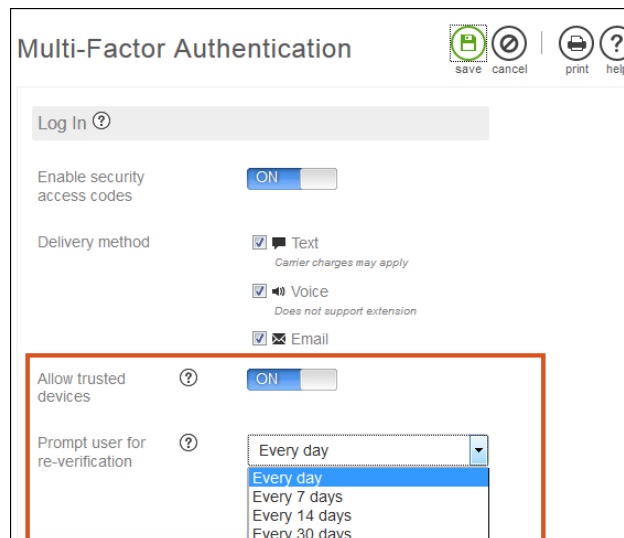
- Change the layout of a page by moving content around to create a look and feel that works for you
- Create new fields, re-name fields, or hide existing fields so all fields on a page are applicable to your organization
- Define field-level security policies and assign default values
- Modify the rules that drive field behavior on the page
- Apply validations

Want more information? Look for a webcast invitation on [Connect With US](#) for a demo to see what you can do with Platform Configurability.

- **Additional multi-factor authentication options.** Implementing sound security measures and best practices is critical to protecting your important people information. Earlier this year, Ultimate introduced multi-factor authentication to protect your employee W-2s, I-9s, and Employee Private Info pages from unauthorized access by requiring administrator and manager accounts to input a temporary access code to view those pages. The Fall/Year-End Release adds an extra layer of protection by expanding the optional multi-factor authentication feature to all employees, by allowing you to require multi-factor authentication when you enter UltiPro via single sign-on or the manual login page.

With this release, you have several options for turning on and establishing security settings for multi-factor authentication. You can require it:

1. For employees upon UltiPro login.
2. For managers and administrators when accessing employee W-2s, I-9s, and Employee Private Info pages.
3. For employees upon UltiPro login and for managers and administrators when accessing employee W-2s, I-9s, and Employee Private Info pages.



Multi-Factor Authentication [save] [cancel] [print] [help]

Log In ?

Enable security access codes ☒ ON

Delivery method

- ☒ Text Carrier charges may apply
- ☒ Voice Does not support extension
- ☒ Email

Allow trusted devices ? ☒ ON

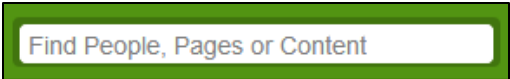
Prompt user for re-verification ?

- Every day
- Every 7 days
- Every 14 days
- Every 30 days

Multi-factor authentication options have not changed. Required accounts must input a temporary access code to view UltiPro pages. You can choose the format for delivering the access code - by text message, phone call, or email.

Ultimate strongly recommends your organization enforce frequent password resets and take advantage of the optional multi-factor authentication feature to further protect your data with multiple layers of security.

- **Session timeout updates.** You can increase the amount of time an UltiPro session can be idle before it times out from 30 minutes to one hour, reducing the number of times individuals have to log in again.
- **Extended search capabilities.** UltiPro's search experience is more efficient. In addition to searching for people and pages, you can use the search box to find content your organization has posted to the UltiPro home page and Content Management pages. Instead of sifting through large quantities of reference material on the UltiPro home page, an employee can search 'benefits,' for example, and the results direct him/her to a list of the company-specific benefits content added by your organization.



INTEGRATION

Seamless integration with other business solutions is a key component of Ultimate's overall technology strategy. The Fall/Year-End Release delivers:

- **Process Hires enhancements.** Additional fields in the Process Hires Web Service enable you to import more information, such as Employee Supervisor and Preferred Name, when you move new hire files into UltiPro.
- **New Third-Party Pay Web Service.** A new Web Service, Third-Party Pay, enables you to exchange payroll data - such as current check details paid from a third-party (earnings/deductions processed by Celergo and imported into UltiPro for multinational workers, for example), payroll history, and a year-to-date pay summary - between UltiPro and third-parties. Employees can view the shared payroll information from a new Third-Party Pay Details page.