



THE PAYROLL COMPANY

Technology Conference



# AGENDA

## WEDNESDAY MAY 8TH

### GRAND ROOM B

**1:00-2:00** High Level  
iSolved Demo

**2:00-2:40** Payroll Tips & Tricks

**2:40 - 3:00 BREAK**

**3:00-3:30** General iSolved Tips

**3:30-4:00** Benefits Overview

**4:00-4:30** Time Overview

## THURSDAY MAY 9TH

### GRAND ROOM B

### PRAIRIE A

### PRAIRIE B

**8:30-9:30** iSolved Best Practices

HR/Onboarding

**9:30 - 9:45 BREAK**

**9:45-10:45** How to Roll Out ESS

iSolved Time &  
Best Practices

High Level  
iSolved Demo

**10:45 - 11:00 BREAK**

**11:00-12:00** General Ledger/  
Labor Reporting  
What Can I Do?  
What Impacts What?

Accumulators,  
Eligibility  
Rules, what can  
they be used for?

iSolved LMS Demo

**12:00 - 1:00 LUNCH**

**1:00-2:00** Open Enrollment/  
Benefits Setup  
& Maintenance

Leave accruals and  
absence policies

Tips & Tricks,  
Troubleshooting

Afternoon break is  
sponsored by,



**2:00 - 2:15 BREAK**

**2:15-3:45** Report Writer  
Deep Dive

Tax Q&A / Ask the  
Expert / Open  
Feedback (what do you  
want to see from TPC)

iSolved Mojo Demo &  
iSolved Hire Demo

**3:45 - 4:00 BREAK**

**4:00-4:30** Round Tables

**Hilton Garden Inn**  
**Sun Prairie**

1220 S Grand Avenue  
Sun Prairie, WI 53590



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# SESSIONS

## High Level iSolved Demo

Our sales team will walk through a typical sales demo of the core iSolved product, covering payroll, time, benefits & HR - and our most widely used features. If you are looking for a high level, system overview, this is the session for you.

## iSolved Best Practices

In this session we will discuss iSolved best practices with topics including employee data management, pre-process, and reporting strategies. We invite you to be willing to share your current practices as well in this interactive discussion session.

## HR / Onboarding

Take a walk through each item found under Human Resources in iSolved. We'll discuss set up, best practices and extras associated with each menu item. You'll also learn more about how iSolved can help automate your new hire process using onboarding.

## How to Roll Out ESS

We will explore the ways that your employees can manage their own data using Employee Self Services (ESS). We will cover how you can take full advantage of the ESS tool by allowing employees to update their own tax information, address, direct deposit and more! We will also discuss troubleshooting tactics that will assist in supporting your employee's use of ESS.

## iSolved Time and Best Practices

We will cover many different aspects of what timekeeping in iSolved has to offer! We'll start out by discussing policy groups and how these factor into allocating rules to different groups of employees. The second part of the discussion will shift over to the My Dashboard page and how this tool can be used to track employee's status, review alerts and verify time cards. Last, will be a high-level overview of the scheduler tool in iSolved and how you can use this tool to create schedules for employees.

## General Ledger / Labor Report

We will begin with a brief overview of the capabilities of iSolved General Ledger setup. We will review labor codes and explain how labor codes work in conjunction with organizational values, which can in turn be used to drive your GL. Then we will review the standard setup of GL Rules and touch on the types of organizational changes which could affect your GL.

## Accumulators and Eligibility Rules

A brief overview of what accumulators and eligibility rules are, how they are used, and where/how to create them. iSolved accumulators can fuel system calculations and improve reporting, while eligibility rules can be used to designate benefit eligibility or to determine company correspondence recipients and more. Bring your questions!

## iSolved LMS Demo

We will do a high level overview of iSolved Learn & Learn Pro. Learn and Learn Pro are an expanded offering of the iSolved University which all users have access to. Upload your own training programs, or assign out more than 150+ courses to your employees to ensure training requirements for your organization are met.

## Open Enrollment / Benefits Setup & Maintenance

In this session, take a deep dive into how to set up and maintain benefit plans. We'll cover changes to rate tables with the new iSolved benefit plan look and feel. Discuss the "benefits of benefits" when utilizing the various online enrollment tools.

## Leave Accruals and Absence Policies

During our dive into leave accruals and absence policies, we will look at the multiple capabilities iSolved has to track your employee's leave requests. We'll look over the different options to make accruals in our system work for you as well as time off request and the workflow that is built to bring everything together. In addition, we will provide different workflow examples regarding who can approve/deny requests on an employee-by-employee basis.

## iSolved Mojo Demo / iSolved Hire Demo

We will take a high level look at iSolved with Mojo & iSolved Hire. iSolved with Mojo is our new employee engagement tool to help drive culture and built collaboration within teams. We'll visit the social and performance/goal setting aspects of Mojo. iSolved Hire is our applicant tracking system - check out how to post jobs, see where your advertising dollars are being best sent, and how to onboard employees directly in to iSolved.

## Report Writer Deep Dive

A sequel to Report Writer 101, this training takes your knowledge of the Report Writer tool even deeper. We will do a quick review on the different report types and field categories, and then will we focus in on calculated columns, conditional columns, and applying filters. Feel free to bring your lap-top so that you can make this a hands-on experience.

## Tax Q & A / Open Feedback Session

In this session, we'll touch on some recent tax changes, most common questions, and have time for plenty of questions (30-60 minute session)