

Advanced Training for HROffice - 2 hour Webex course

Benefits

- Review Sample Benefit Plans
 - Medical
 - Dental
 - LTD/STD
 - Retirement/401K
 - Other
- Review Section 125 Plans
 - Enrollment of Section 125 Plans
 - Healthcare Reimbursement
 - Dependant Care
 - Premium Conversion
 - How to Verify Premium Conversion
- Enrollment of Benefits
 - Review Individual Enrollment
- Batch Enrollment
 - Configure a New Batch
- Online Enrollment using Self Service

Customization Wizard

- Create Customizations using Tabs
 - Simple or Listed View
 - Creating Labels and Using different field formats
 - Structure the view of your customization
 - Importing Data to Custom Fields

Employee Correspondence Wizard

- Create a Correspondence Batch - Step through
 - Selecting Type of Correspondence to be Sent
- Modify, Organize and Run Correspondence Batch

Reporting

- Overview of Reporting (Flexible vs. Ease of Use)
 - Create a Report Using Report Wizard
 - Modify and Print Report
 - Create a Custom Report Using Report Wizard
 - Modify and Print Report
 - Create a Custom History Report Using Report Wizard
 - Modify and Print Report
 - Enable Reporting Using MS Access
 - Exporting a Report to MS Excel
 - Organizational Chart Using Visio

QuickStart Data Import

- Recommendations for Importing Data
 - SSN Requirement
 - Using MS Excel format
 - Using Comma Delimited
 - Dependant Data

Maintenance HROffice

- Backup and Recovery
- Migrate Database
 - Export/Import Database to File
- Change Password
- Review Users Logged onto HROffice
- Printer Setup
- SQL Server (Enterprise Only) - SQL Server Authentication

Alerts (Optional - only if requested by class)

- Recommendations and Requirements for Alerts
 - Collaborative Data Objects
- Connect Alerts to HROffice Database
- Configuration Using Alerts Wizard

Self Service Wizard

- Setup Security Policy
 - Configuration for Self Service Access
- Setup Self Service Applications
 - Configuration for Applications
 - MySelf, MyFamily, MyBenefit, MyTimeOff, MyCompany
 - Configure Links, Documents and Comparison screens
- Open Enrollment for Employees
 - Using the Self Service Applications to Enable Changes
 - Review Self Service Administration within Employee Manager
 - For review of Open Enrollment
- Setup Approval Policy
 - Configure who can approve using Security & Licensing
 - Define Approvals for each Section of Self Service
- Setup and Configure the Login Page and SMTP Server
- Self Service Administration - Employee Manager
 - Enable User Accounts & Passwords
 - Send Out Account Information using Correspondence Wizard
 - Approve Pending Changes
 - Review Logs to determine bad logins and rejected changes