iSolved

iSolved | Go v13.7
Employee User Guide

## Table of Contents

iSolved | Go Introduction

iSolved | Go is an optional add-on for the iSolved platform that allows employees and supervisors to punch IN and OUT from an Android or Apple smart phone. While the app is free, there may be a charge for the ability to use the mobile application for some customers, so please check with your payroll provider if you are unsure if your company elected to use this application.

Information entered via iSolved | Go is securely stored in the iSolved database and can be used interchangeable with the other forms of data entry. Punches can be made from a physical time clock, the ESS screens of iSolved, or the iSolved | Go app. For example, your "IN" punch for the day can be entered at your desk using ESS, while your lunch and/or "OUT" punch can be entered via your mobile as you are waiting for the elevator at the end of the day.

This guide includes instructions on how to download and install iSolved | Go from the Google Play/Apple Store, and how to use the application to punch in and out as an employee.

### Downloading iSolved | Go from Google Play/Apple Store

On your Android/Apple smart phone, open the application store and use the search term "iSolved" or "iSolved | Go" to find the application. Select the option to install this application. Once you have downloaded and installed iSolved | Go, please open it to proceed.
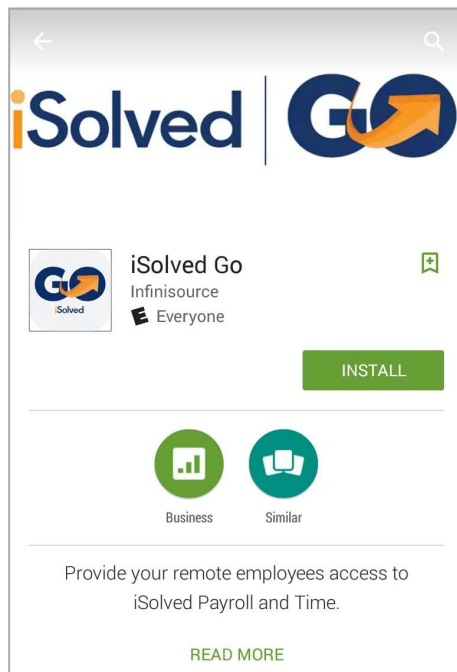
Logging into the iSolved | Go Application

This is the login page for the iSolved | Go Interface. All users must exist in iSolved as self-service users with the appropriate permissions to use the features of the application.

Note: The system accepts login from Employee Self Service users *only*. Client-level iSolved user information will not be accepted as a login for iSolved GO.
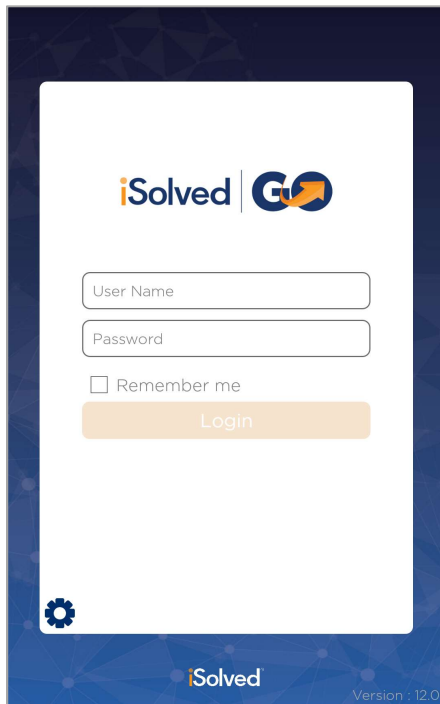
1. Enter your iSolved user name in the **User Name** field. This is always your email address.
2. Enter your iSolved password in the **Password** field.
3. Click on the **Login** button to log into the application.

With the **Remember Me** option selected, the app will automatically log in upon launching.

Note: Your phone must use a lock screen secured with a PIN, pattern or fingerprint in order for auto-login to function. Otherwise, the **User Name** will be remembered, but you will have to enter your **Password** to log in.
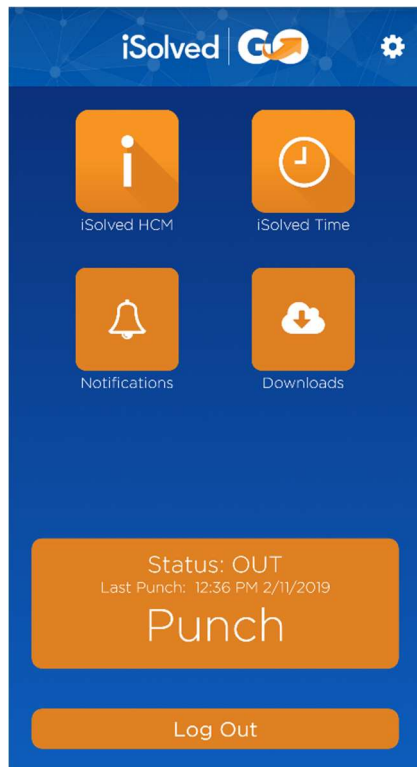
After three unsuccessful login attempts a message will appear which reads:

"It looks like you are having problems signing in. It could be caused by:

- *Your company does not allow mobile sign-ins.*
- *You have not configured the Network Partner.*

For assistance please contact your service provider."

iSolved | Go Overview

Once you have successfully logged into the iSolved | Go application, the main screen appears.

The main application screen is broken up into two sections. The selection options at the top of the screen are reviewed in detail later in this guide. The bottom of the screen contains the **Punch** and **Log Out** options.

Your current punch status is displayed, along with the date and time of your last "In" or "Out" punch. If the last punch recorded is over 8 days old, no data is displayed.

Select the **Punch** icon to enter punch directly, without having to navigate the "iSolved Time" menu. **Note:** Whether this icon enters a "Quick Punch" or a "Detailed Punch" is defined by the option specified in the **Settings** menu. Click on the gear icon in the upper right-hand corner of the screen to review this setting.

The **iSolved HCM** area contains the following options:
Note: Not all options may be available to all users.

- View Paystub
- Update My Information
- Change Tax Withholdings
- Time Off Balances
- Time Off Request
- Update Password

The **iSolved Time** area contains the following options:
**Note:** Not all options may be available to all users.

- Time Card
- Mobile Punch
- View My Schedule
- Settings

Additional Options

- The **Notification** area contains any notifications that have been sent to you from the iSolved system. See "Appendix D" on page 19 for details on this screen and its function.
- The **Downloads** area allows you to download paystubs and W-2s to your mobile device in PDF format. See "Appendix E" on page **Error! Bookmark not defined.** for details on this screen and its function.
- Click on the ⚙ icon to access the **Settings** screen. Refer to page **Error! Bookmark not defined.** for more information on this screen.
- The **Log Out** icon at the bottom of the screen will log you out of the application.

The following sections outline more detail on the different options in the **iSolved HCM** and **iSolved Time** areas.
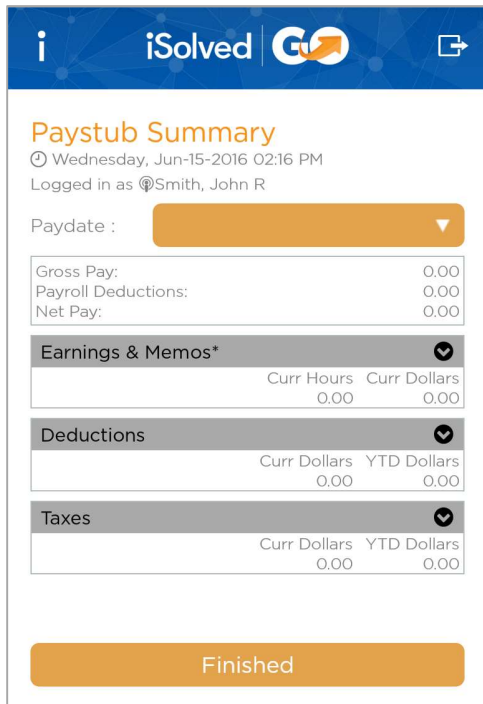
iSolved | HCM
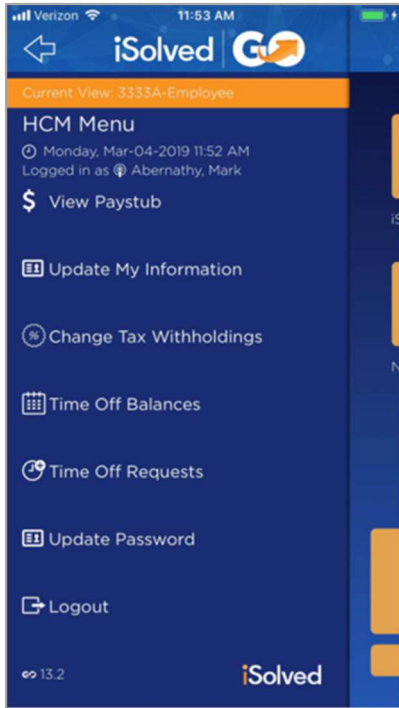
Once you have logged into iSolved HCM, your name and current date/time will be displayed on the upper left hand side of the screen.

From this menu, the following areas can be selected:

- View Paystub
- Update My Information
- Change Tax Withholdings
- Time Off Balances
- Time Off Requests
- Update Password

View Paystub

Select the desired **Paydate** from the drop-down menu.

By clicking on the ⌄ button using a finger, the details under each section of the **Paystub Summary** screen can be viewed.

The **Finished** button returns you to the **iSolved HCM** menu.

Update My Information

This screen allows you to update your personal information in the iSolved system.

Make any necessary edits to the information in the **Phone Number** and **Address** sections, and click on the **Save** icon.

When you specify a **Zip Code** first, the application will download a list of appropriate city/state selections from the host. A **School District** code may be presented as well, depending on the Zip Code entered.
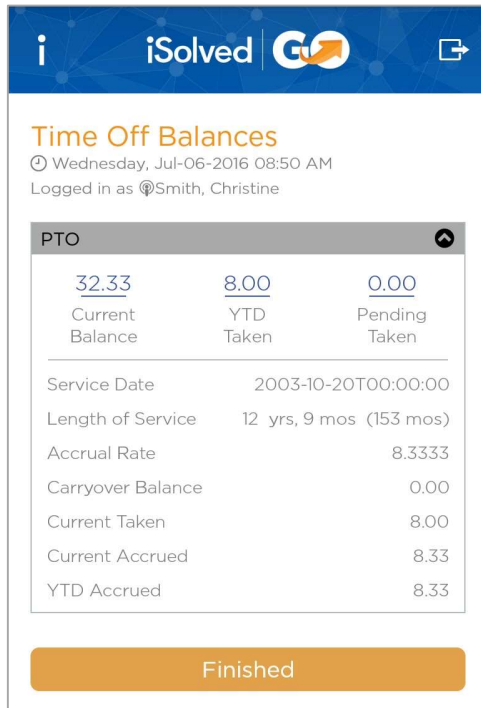**Note:** A change of address may cause a change in taxes.

Change Tax Withholdings

With the new 2020 W-4 requirements, you are no longer allowed to make changes to tax withholdings via the mobile app. Changes must be made through Employee Self-Service in iSolved.

The following message appears when attempting to access **Change Tax Withholdings**:
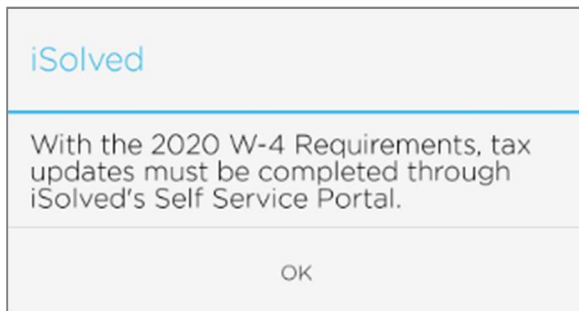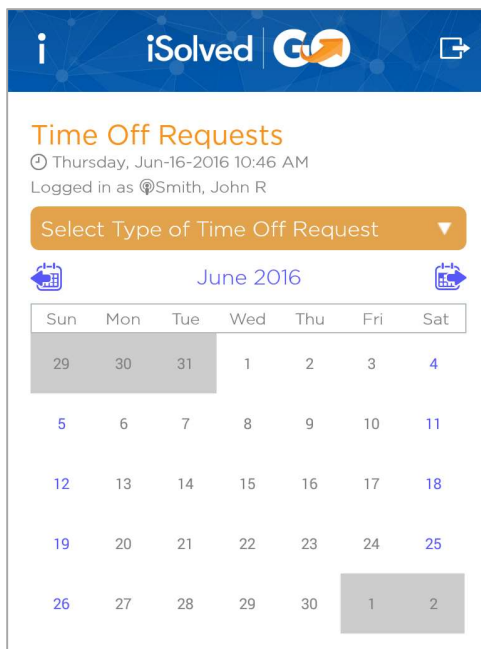
Time Off Balances

The **Time Off Balances** screen allows you to view your up-to-date accrual balance information from iSolved.
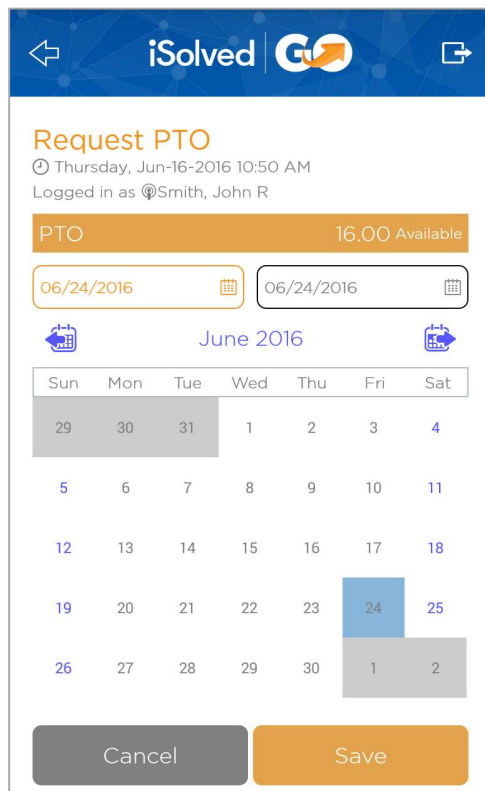
The **Finished** button takes you back to the **HCM Menu**.

Time Off Requests

To request time off, please follow the instructions below:

1. Select **Time Off Requests** in the **HCM Menu**.
2. Any time off used or requested is displayed in the calendar.
3. Select the accrual you wish to use for the time off request from the drop-down menu.
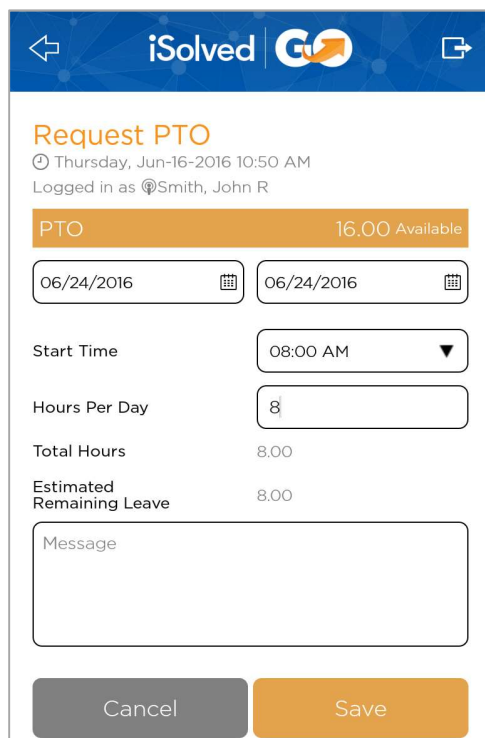
1. Select the **From** and **To** dates for the time off request. Dates can be selected by pressing each desired date directly from the calendar. The selected dates are highlighted.
   Note: The **From** and **To** fields select the "Start" and "End" dates of the desired range only. The days in between must still be selected.
2. Press the **Save** button at the bottom of the screen to continue.

3. Select the **Start Time**, and enter the number of **Hours Per Day**.
4. The **Total Hours** requested and **Estimated Remaining Leave** for the accrual policy selected are displayed.
5. Enter an optional **Message** to be attached to this request, if desired.
6. Click on the **Save** icon. You are taken to the **Confirmation** screen.
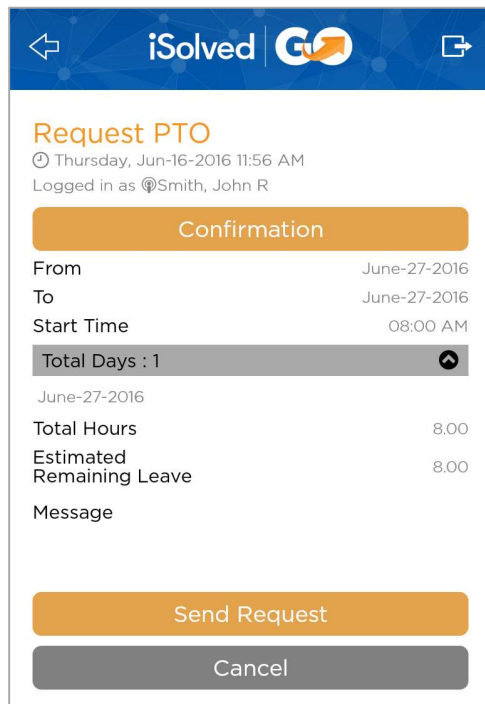
7. Verify that the time off request is accurate and complete.
8. Click on **Send Request** to process and send the request to iSolved.

Update Password

This option allows you to update your login password. Upon opening this screen, a message appears notifying you that a temporary authorization code must be entered. Select either the "Email" or "Text" options to receive this code.
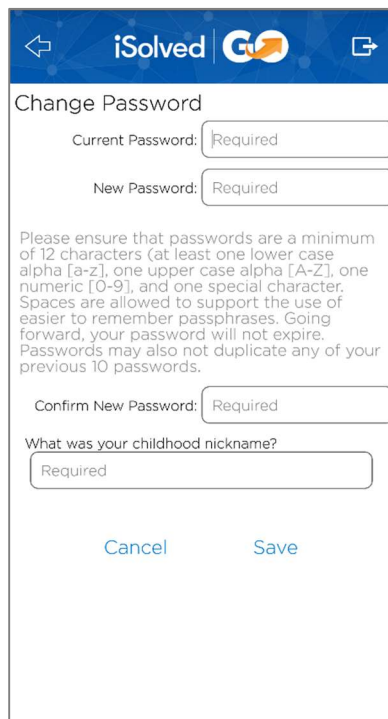
Note: The "Text" option only appears if there is a cell phone number in the system.
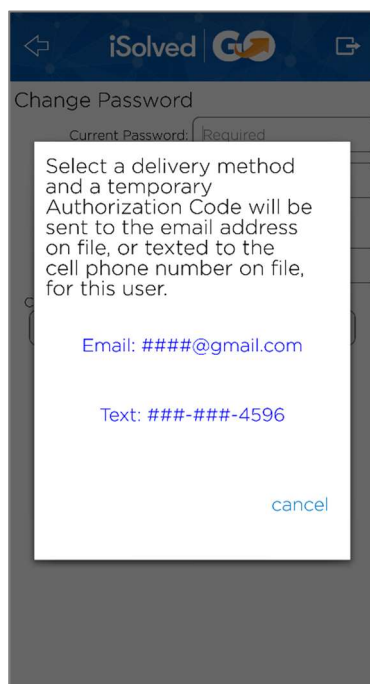
Select the desired option, and retrieve the temporary authorization code. Enter the code, and select **Verify**.
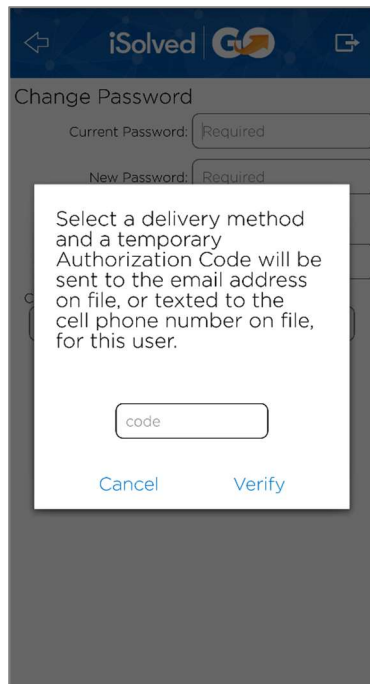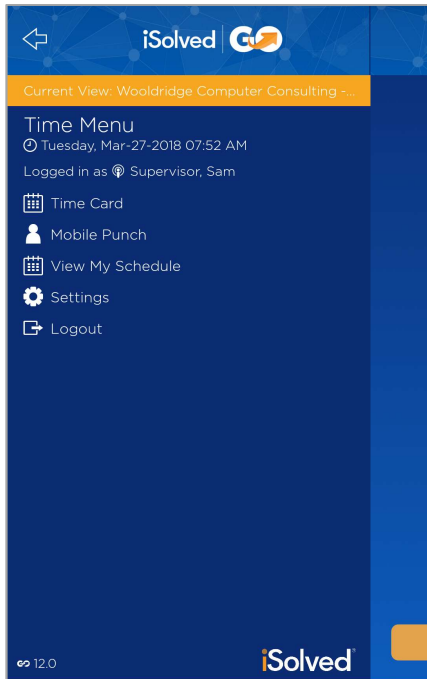
Once the authorization code has been verified, the **Change Password** screen appears.

Enter your **Current Password**, choose a **New Password** and **Confirm New Password**. You must also answer a security question at the bottom of the screen.

Click on the **Save** icon to save the new password.

iSolved | Time

Once the **iSolved Time** icon is selected, your name and current date/time will be displayed on the left-hand side of the screen. From this menu, the following areas can be selected:

- **Time Card:** Allows you to view and/or verify your Time Card.
- **Mobile Punch:** Allows you to punch in/out using the iSolved | Go Interface.
- **View My Schedule:** Allows you to view the shifts that you have been scheduled to work in the program.
- **Settings:** Allows you to enable or disable iSolved | Go Time fields and features.
- **Logout:** Logs you out of the mobile interface.

Time Card

The **Time Card** screen has three views: "Pay Period," "Weekly" and "Daily.
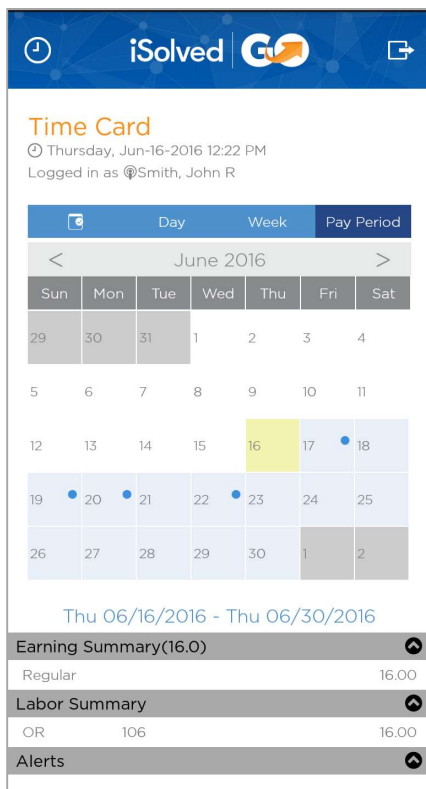
Pay Period View

Use the forward and back buttons to either side of the displayed month and year to browse through the calendar.

A dot appears next to any date on which Time Card punches exist. The selected pay period dates are displayed below the calendar.

- A blue dot indicates normal hours on your Time Card for that date.
- A red dot indicates a Time Entry Error.
- A green dot indicates a Holiday.
- A grey dot indicates PTO (Absence).

Dots are only displayed on the currently selected Pay Period.

The **Earning Summary**, **Labor Summary** and **Alerts** menus can be expanded for detailed pay period totals. The **Notes** field displays any notes that were entered with this punch.

Weekly View

A table is displayed for each day of the selected week. The displayed week dates are shown below the tables. Use the forward and back icons to browse through the calendar.

Punched time is highlighted in blue at the appropriate times on the table for each day.

The **Earning Summary**, **Labor Summary** and **Alerts** menus can be expanded for detailed weekly totals. The **Notes** field displays any notes that were entered with this punch.

Daily View

The selected date is displayed in orange. Press the forward or back buttons to browse through dates.

The **In** and **Out** punch times for the day are displayed, as well as punch **Type** and total number of **Hours**.

The **Earning Summary**, **Labor Summary** and **Alerts** menus can be expanded for detailed weekly totals. The **Notes** field displays any notes that were entered with this punch.

Time Card Verification

If your system is set up to require you to verify the data on your Time Card before payroll is processed, this can also be performed from the Time Card screen.

Note: The "Pay Period" view is used in the example below. However, the instructions are the same regardless of the view selected.
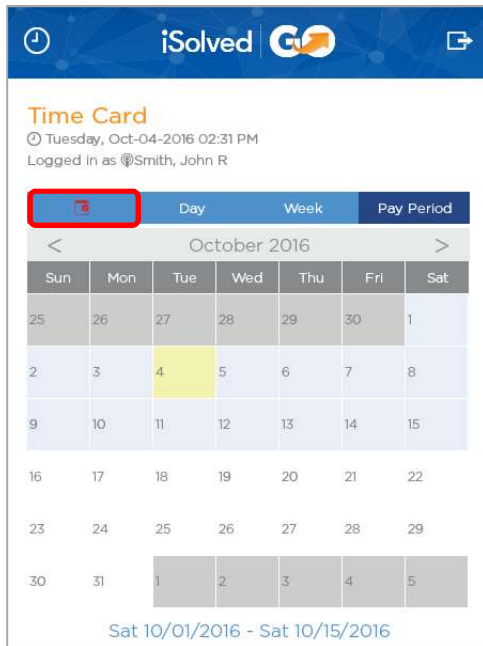

- When a Pay Period is in need of verification, the **Alert** icon located to the left of the Day/Week/Pay Period view selections will appear in red.
- Clicking on the red alert will allow you to verify your Time Card at an "Employee" level.
- Put a check mark in the **Employee** box to verify your Time Card.

Mobile Punch

Use the following steps to create a punch using the iSolved | Go interface.
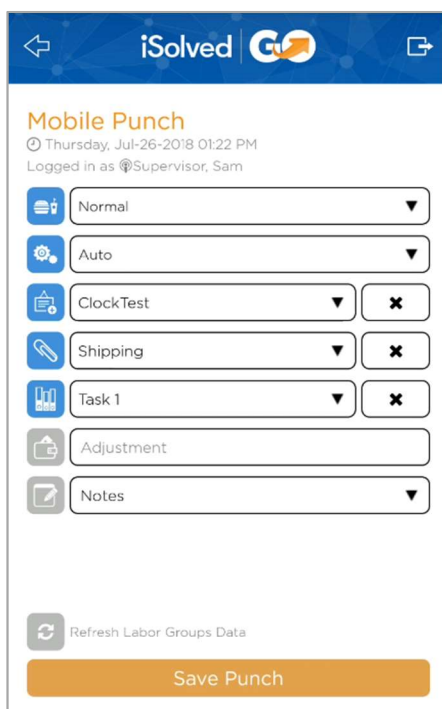
1. Select the **Mobile Punch** option in the **Time Menu**.
2. Enter the different punch parameters that you require.

   Each user can enable or disable fields for Mobile Punching via the **Settings** screen in the iSolved | Go Application.

Below is a definition for each punch field/option available:

- **Normal:** Used to specify if the punch is to be a "Normal," "Break," or "Lunch" punch.
- **Auto:** Allows you to specify if the punch is to be an "Auto," "In," "Out," or "Transfer" punch.

  - Auto punches allow iSolved to put the punches in the order they occur based on time.
  - Transfer punches allow you to change department, job, or task values and creates two punches at the same time, one out of the old department/job/task value, and a punch into the new specified department/job/task values.

- **Labor Groups:** The next 3 fields are the Labor Group fields. These fields allow you to add additional information (such as Department, Job, Task, etc.) to your Time and Attendance punch. Make the appropriate selection from each drop-down menu.
 **Note:** The screenshot provides you with an example of a typical Labor Group setup. However, the actual appearance of these fields will vary greatly depending on how the Labor Groups have been set up for your company.
- **Notes:** This field gives you the ability to enter notes with a punch. These notes are viewable on the Time Card in both the iSolved program, and in the iSolved | Go app under the "Day," "Week" and "Pay Period" Time Card views.

3. Once the appropriate entries are made, select the **Save Punch** button to save the punch.

If the phone's GPS or Location Services feature is enabled, the application will attempt to capture location information for the punch as well. This punch GPS data can be viewed in iSolved | Time once the punch appears on the employee's Time Card.

Quick Punch

Use the following steps to create a Quick Punch using the iSolved | Go interface.
Note: This functionality replaces the **Mobile Punch** feature described above. The **Quick** Punch option must be enabled in the **Settings** screen before you will have access to this option.
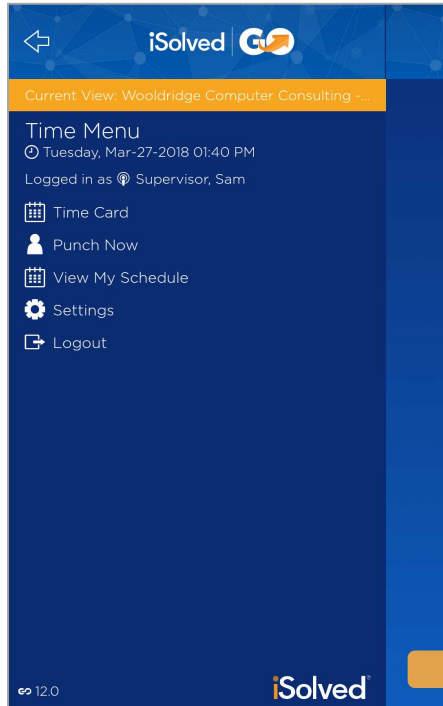
1. Select **Punch Now** from the **Time Menu**.
2. A confirmation box appears asking if you would like to save the punch.
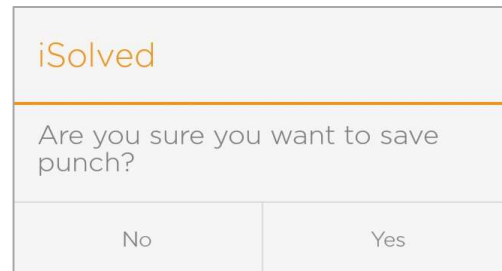
3. Press the **Yes** icon to complete the punch entry.
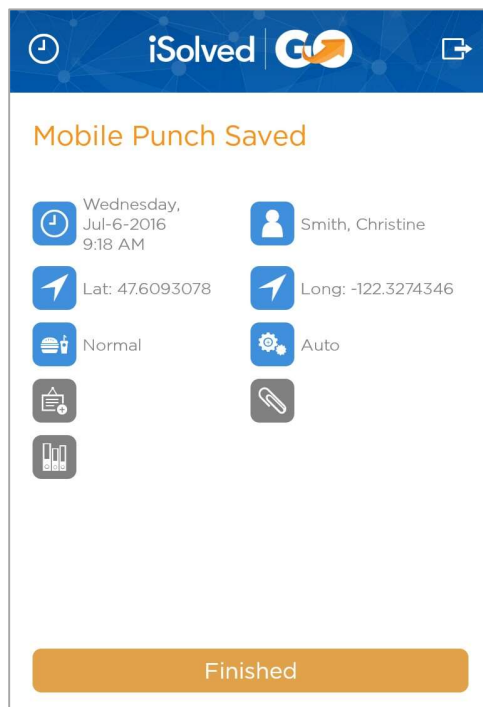
4. A screen appears displaying the details of the punch that you just submitted.
5. Click on the **Finish** icon to return to the Time menu.

View My Schedule

This option allows employees to view the shifts that they are scheduled to work in the iSolved system.
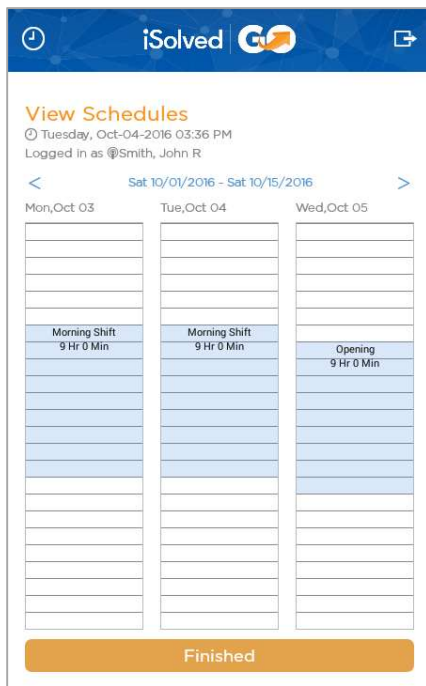
A table is displayed for the days of the week. The date range is shown at the top of the screen.

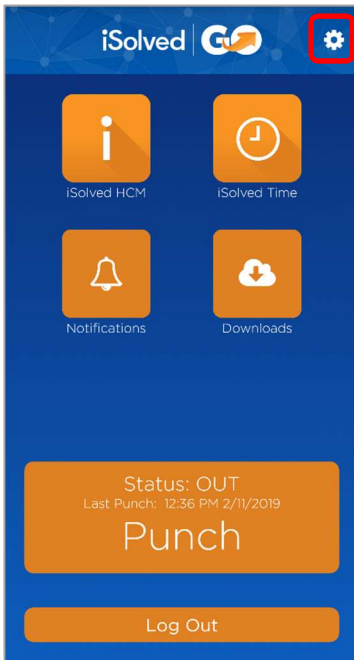View scheduled shifts by scrolling up or down with your finger for each displayed date.

Clicking on a scheduled date will bring up a window showing the schedule details.
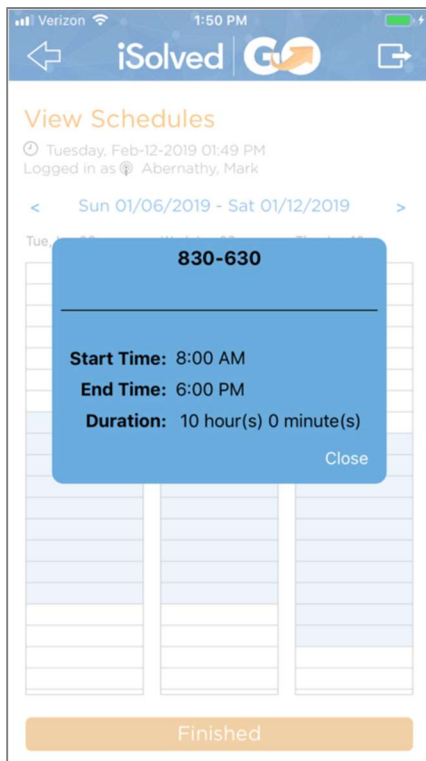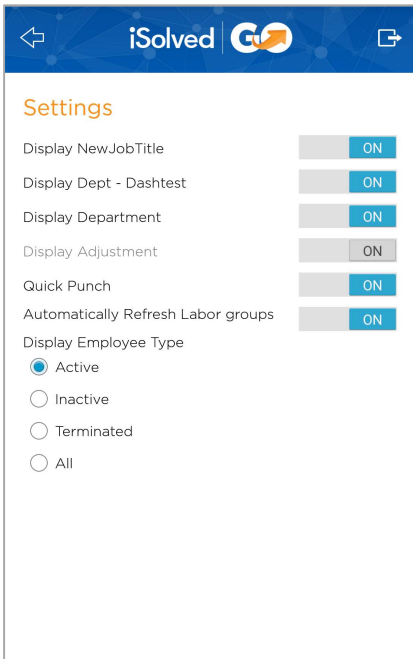

Press the **Finished** icon to return to the **Time** menu.

Settings

From the main navigation menu, click on the **Settings** icon.

You can enable or disable fields in the "Mobile Punch" area by turning the fields on or off.

The **Quick Punch** option allows you to immediately create a punch by clicking the **Quick Punch** button without entering any of the other optional parameters (such as In/Out, Meal/Break, Labor Groups, etc.).

The **Display Employee Type** section allows you to specify that you would like to view "Active," "Inactive," "Terminated" employees, or "All."

Appendix A: Notifications

This feature uses the "Workflows" setup in the iSolved system to send notifications to mobile users.

Workflow Summary

A workflow in iSolved allows an employee, manager, or supervisor to request changes or updates to certain employee information through Employee Self Service in iSolved. The request can then be approved or rejected by a supervisor, manager or administrator.

When used with iSolved | Go, notifications of these updates or requests are also sent to the appropriate mobile users. The following workflows must be set up in iSolved for use with mobile notifications:

- Manager/Supervisor Role

    o Time Off Requests (TOR)

- Employee Role
    o Address Updates
    o TOR Approvals or Rejections
    o Pay Deposited
    o Personal Information Updates

Note: Notifications for Time Card Verification can also be viewed via iSolved | Go. These notifications use the **Verification Rules** set up in Client Management > Time Management > Verification Rules.

Refer to documentation on "Workflows" in the iSolved system for further details on setting up and using workflow routes and transactions.

Mobile Notifications

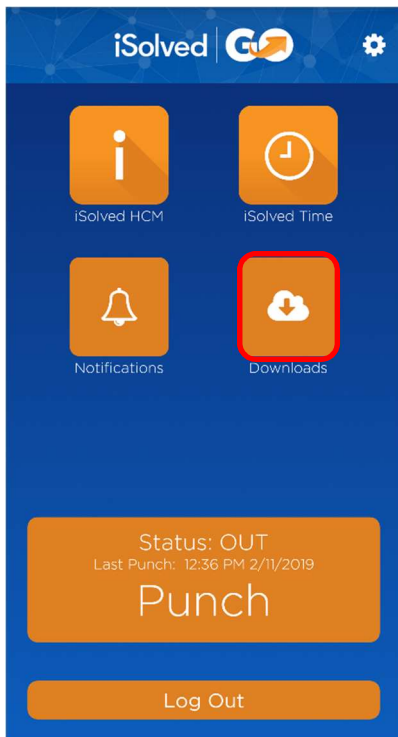From the main navigation menu, click on the **Notifications** icon.
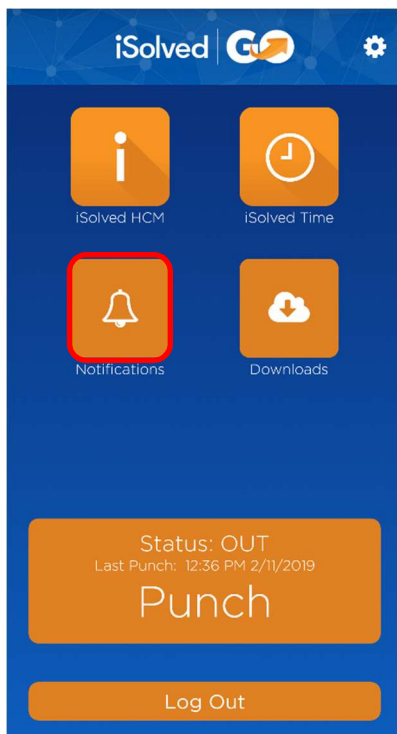
The notifications that have been sent to you in the iSolved system are displayed. Click on the notification to be taken to the relevant screen in iSolved | Go.
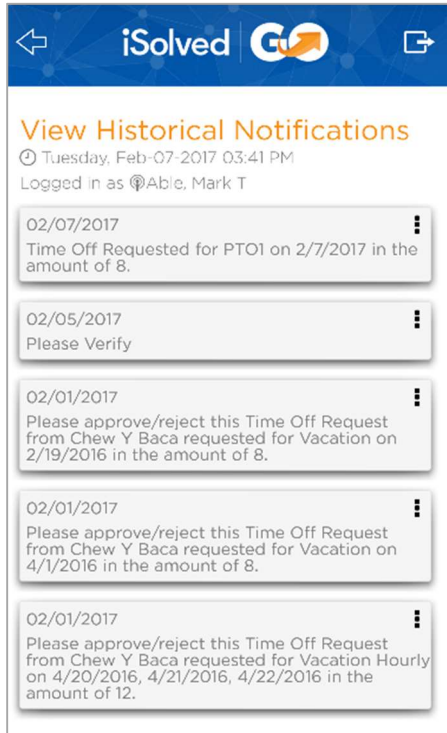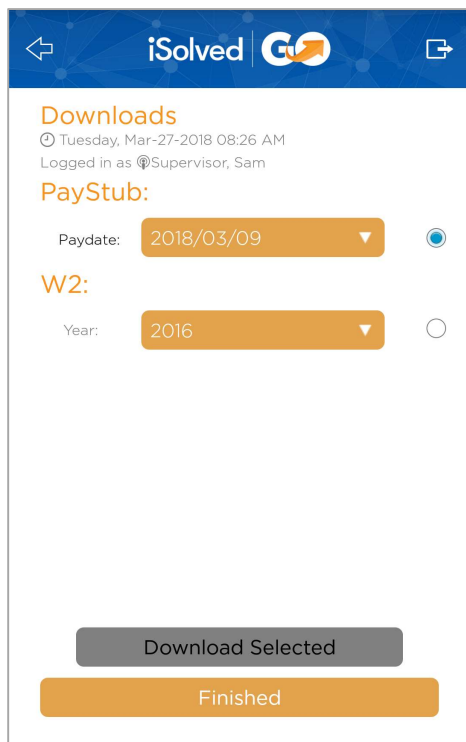

Click on the ellipsis icon to the right of any notification to **Delete** or **Delete All** notifications.

Appendix B: Downloads

This option allows you to download paystubs and W2s to your mobile device in PDF format.

From the main navigation menu, click on the **Downloads** icon.

- To download a paystub, select the radio button under the **PayStub** section, and select the desired **Paydate** from the drop-down menu.
- To download a W2, select the radio button under the **W2** section, and select the desired **Year** from the drop-down menu.

Once you have made the desired selections, click on the **Download Selected** icon.

Before you will be able to download to your device, you must first grant the iSolved | Go app access to your device's media storage.
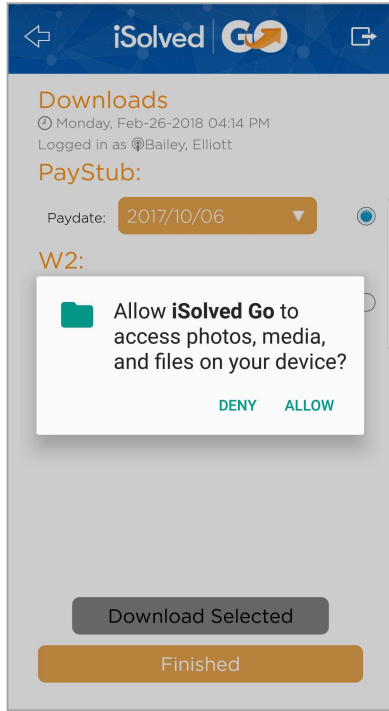
Select "Allow" to enable iSolved | Go the necessary permissions to save files to your device.

The following is an example of a downloaded paystub: