EL-ITE Systems Guide

Overview

Welcome and congratulations on partnering with EL-ITE Consulting!

This document highlights the key differences between the two systems we use to deliver exceptional Partner experiences: **Smartsheet** and **Setuply**. Our goal is to provide transparency and visibility into all the work we do for our Partners.

Below, you'll find definitions on when to use each system, along with helpful information on how to make the most of them. See the *Additional References* of this document for full links that can be copied and pasted into your browser.

Note: Partner vs Client

We refer to UKG resellers as our **Partners** (your organization) and their customers as **Clients**. During onboarding, we request various contacts to identify the best points of communication. The contacts you designate on the onboarding questionnaire will be the ones we reach out to with questions and who may receive regular notifications.

Note: Project Requests vs Support Case Requests

In Setuply, EL-ITE manages both ***Case Management*** and ***Project Management***. Case Management refers to Support Cases, while Project Management involves Project Requests. In short, we handle two categories: Projects and Cases.

Projects include, but are not limited to, client/partner trainings, implementations, and model reviews for modules like Payroll, TLM, HR Core, and Recruitment. These projects typically take 2 or more hours to complete and are usually longer in duration, focusing on changes to existing configurations or new configurations.

Cases cover any requests or issues outside of formal projects, such as support needs or problems related to ongoing projects or existing configurations. These can be submitted by Partners on behalf of themselves or their clients and typically involve troubleshooting, inquiries, or assistance that doesn't require a full project request. Examples include UKG system errors, workflow issues, etc. Note: The terms Case Management and Support/Support Cases are used interchangeably and refer to the same process.

Setuply: Project & Support Requests

EL-ITE utilizes Setuply for a user-friendly Project Requests and Support Case management interface. We use Setuply to efficiently and effectively handle our Partner projects & support cases. Once a Partner User has set up their Setuply account, as detailed in the Setuply Client Portal Introduction, they can submit, track, monitor, and edit their Project Requests and Support Requests. For more guidance on submitting cases, please refer to the Setuply Client Case Management procedure. For more guidance on submitting projects, please refer to the Setuply Client Project Management

It's important to note that while both Partners and their Clients can submit support cases, we strongly prefer that Partners handle submissions themselves. Partners will have accounts in Setuply, allowing them to view case histories and manage requests comprehensively. Clients can submit requests via email or the data form and should CC the appropriate Partner contact to maintain visibility, if the Partner was not already included, then they will be added directly to the case. This structure ensures that all parties are well-informed and that cases are managed efficiently.

Clients cannot submit Project Requests on behalf of themselves, only Partners are granted access to these. There is no direct link to the Project Request form, requesters must be added to Setuply & login to their account and submit Projects this way. For more on users, please see our Setuply Users information sheet for more on how to request new users.

Setuply Resources

Setuply Login Link: Must be taken from invite email as it is unique to each organization.

Setuply Client Case Management

Setuply Client Portal Introduction

Setuply Client Project Management

Setuply Users

Smartsheet: Hour Tracking

EL-ITE uses Smartsheet for monitoring and tracking Project Hours. Part of our tracking includes sending regular notifications to the designated Monthly Hour Notice contact, which is designated during onboarding.

To ensure timely communication and avoid project delays, please add EL-ITE's Smartsheet sender, automation@app.smartsheet.com, to your list of safe senders.

Smartsheet Resources

Smartsheet Login

Task and Module Descriptions

Additional Resources

For questions, concerns, comments: support@el-iteconsulting.com

Full Links:

Smartsheet Login

Full Link:
https://app.smartsheet.com/b/home?_gl=1*u1cjvc*_gcl_au*MTA3ODkxOTIyNi4xNzIxMDUxMjc4*_ga*MTI3MjcwNTAyMC4xNjkwMTk5Njg5*_ga_ZYH7XNXMZK*MTcyMTgzMTk2Ni41LjAuMTcyMTgzMTk2Ni42MC4wLjA

Setuply Login

Full Link:
Specific to each user, will be sent via email

Task and Module Descriptions

Full Link:
https://eliteconsulting2.sharepoint.com/:w:/s/Intra/EUiuKkkGyRdPoNI1HnJ5etEBAcZ_rKQtXa7HYn1jtkb6OA?e=q7hRrc

Setuply Client Portal Introduction

Full Link:
https://eliteconsulting2.sharepoint.com/:b:/g/EbeUg_Tjz-VJqKD20PTUX0wB_NHOSmoE3kqZSnqMDmgPqw?e=7ZFTyf

Setuply Client Case Management

Full Link:
https://eliteconsulting2.sharepoint.com/:b:/g/Ef0sWJahTPJOscXXL79IDMABF5SCFZ4sBPsiowrUl19uMg?e=EZWpfU

Setuply Client Project Management.pdf

Full Link:
https://eliteconsulting2.sharepoint.com/:b:/g/EYFPaAQQ2a1DhW5GoyzjsjYBt3hFHg7E5o6WI47YFmoeUQ?e=6uUswi

Setuply Users.pdf

Full Link:
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Full Link:
https://eliteconsulting2.sharepoint.com/:b:/g/EfUtIOTiCOpJqWe9mhWymA4BGc0JKQgD1Z2oDeC95-BM1Q?e=aR5qtw