



CONNECT

@ the Equus Client Conferences

Denver | May 1 - 2, 2018

PRE-CONFERENCE TRAINING

Advance your AssignmentPro product knowledge by taking advantage of our optional, one-day Pre-Conference Training.

Prerequisites include:

- **Basic Training:** General system knowledge and ability to create/update assignments, employees, and authorizations. System administrator users will benefit more from this session.
- **Advanced Training:** Effective use of compensation and payroll configuration, and the ability to use custom SQL in user reports.

Monday, April 30, 2018

		BASIC TRAINING Kebler Pass 1	ADVANCED TRAINING Kebler Pass 2
1:30	2:30	Tier 1 Super User Support <i>Steven Oduniyi, Equus</i> Basic troubleshooting, reviewing logs, knowing when to send to Equus, creating effective support requests	Effective Compensation Configuration <i>Richard Brockhoff, Equus & Mikael Lorimer, Equus</i> Understanding how to use the Compensation Data Repository, Custom Calculations, Compensation Calculation and Compensation Worksheets in the compensation process
2:30	3:30	Basic Maintenance <i>Daniel Rosson, Equus</i> Create and maintain lookup lists, custom fields, company segments, required fields	
3:30	3:45	<i>Break in the Foyer</i>	
3:45	4:45	Creating User Pages <i>Rafe McDonald, Equus</i> Create and maintain user pages, including new feature providing for hierarchical lookups	Using Custom SQL in User Reports to Support Compensation Reporting <i>Tyler Meche, Equus & Jason Bobzin, Equus</i> Learn how to create custom SQL to do more with user reports, including aggregating data, creating reports to underpin your metrics/SLA reporting, and creating complex reports across varied data sources.

Tuesday, May 1, 2018

		BASIC TRAINING Kebler Pass 1	ADVANCED TRAINING Kebler Pass 2
7:30	8:30	<i>Breakfast in the Foyer</i>	
8:30	9:30	Policy Configuration <i>Troy Parker, Equus</i> Creating and maintaining policies, including policy fields/exceptions and new features supporting mobile employee experience, auto policy selection and an introduction to core/flex	Using Custom SQL in User Reports <i>(continued)</i>
9:30	10:30	Authorization Routing <i>Gary Sanders, Equus</i> Configuring authorized approvers and approval rules.	Creating a Custom Balance Sheet Using Excel Merge Docs <i>Dung Tran, Equus</i> Learn how to create custom balance sheets to meet any business needs
10:30	10:45	<i>Break in the Foyer</i>	
10:45	11:45	Merging Data <i>Daniel Kennamore, Equus</i> Learn to merge data into documents, email templates, service orders and excel documents.	Creating a Custom Balance Sheet Using Excel Merge Docs <i>(continued)</i>



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CONFERENCE AGENDA

Tuesday, May 1, 2018

11:00	1:00	<i>Registration & Lunch in the Foyer</i>	
		GENERAL SESSION Grove Ballroom 1 & 2	
1:00	1:30	Welcome: Join Mark Thomas, CEO of Equus, as he shares the latest chapter of the Equus story.	
1:30	2:30	Future of Global Mobility Technology: Empowering HR and Global Employees Connecting your Global Mobility ecosystem is a catalyst for a myriad of efficiency gains. This session will explore the key themes of automation, standardization and self-service and discusses how together these can create a more integrated and efficient process for managing international moves, both for employees and the business. <i>Tyler Reynolds, Equus</i> <i>Tim Stansel, PwC</i>	
2:30	3:00	<i>Break in the Foyer</i>	
		STRATEGIC Kebler Pass 1	PRACTICAL Kebler Pass 2
3:00	3:45	Enhancing the Employee Experience Through Flexibility & Choice <i>Alan Bell, Equus</i> <i>Robert McCormick, JP Morgan Chase</i> <i>JoAnn Dobres, JP Morgan Chase</i> Explore how JPMC is transforming their GM program to meet the needs of the business and provide a more agile support model for the future through core flex policies and an enhanced user experience.	Designing for Automation <i>Tripp Brockhoff, Equus</i> <i>Andrew Brooks, Equus</i> Explore how to leverage assignment packages, user pages and tables, and user report based calculation tools in AssignmentPro to build automation and minimize recurring maintenance.
4:00	4:45	Global Tax Trends: Understanding Impact and Opportunities Policies <i>Vickie Lau, Equus</i> <i>Josh Jagust, Grant Thornton</i> Learn about tax law changes in the U.S and around the world impacting global mobility programs and review opportunities for cost management.	HR/Business Self-Service <i>Bryan Holbert, Equus</i> <i>Vi Vo, Equus</i> Discover the new functionality that allows HR/ business users to do more themselves in APro. Learn about new ways that new initiations and on assignment requests can be handled, plus the controls that mobility teams can put in place.
5:30	6:00	<i>Reception in the Foyer</i>	



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Wednesday, May 2, 2018

7:30	8:30	<i>Breakfast in the Foyer</i>	
		STRATEGIC Kebler Pass 2	PRACTICAL Kebler Pass 2
8:30	9:15	<p>Skilling up the Global Mobility Organization of the Future <i>Michelle Fertig, Deloitte</i> <i>Alan Bell, Equus</i></p> <p>Does your team have the proper framework, processes, and skillsets in place for digital transformation? This interactive discussion explores the changing dynamics of global mobility and discusses the new roles and skills required to adapt and thrive.</p>	<p>Core/Flex <i>Bryan Holbert, Equus</i> <i>Vi Vo, Equus</i></p> <p>Following on from the HR/business self-service presentation, looking at new functionality within initiations that allows users to set assignment allowances and benefits within pre-set rules. HR/business users can now have direct access to select and model packages, based on policy and allowance rules set within AssignmentPro.</p>
9:30	10:15		<p>Managing Risk Using AssignmentPro Features <i>Katelin Yearsley, Equus</i> <i>Dani Williams, Equus</i></p> <p>A review and discussion of the features in AssignmentPro that assist companies with managing data security risks.</p>
10:15	10:45	<i>Break in the Foyer</i>	
10:45	11:30	<p>Business Travelers: Balancing Compliance, Personalization and Employee Well-being <i>Sheri Gaster, Equus</i> <i>Jacob Johnson, Equus</i></p> <p>As the mobile workforce evolves, organizations must adapt to employees changing needs. Learn how to utilize advanced technologies to gather additional data sets and analytics about employees' state of mind, level of engagement, motivations, and more.</p>	<p>Optimizing Social Security Management with AssignmentPro <i>Gwen Sakponou, Equus</i> <i>Jeanell Taylor, Equus</i></p> <p>Learn how clients have implemented AssignmentPro features to manage social security in their GM programs.</p>
11:30	1:00	<i>Lunch in the Foyer</i>	
		GENERAL SESSION Grove Ballroom 1 & 2	
1:00	3:15	<p>Feature Roundtables: Clients and Equus experts will be hosting an intimate discussion on key topics and features while exploring the art of the possible. Attendees will rotate between each topic throughout the session.</p> <ul style="list-style-type: none"> Compensation Data Repository (CDR) & One Time Payments <i>Gain an understanding of what the CDR is and how it can be used to account for one-time payments through compensation worksheets and payroll.</i> Mobile Employee Experience <i>Discover what's possible with the Mobile Employee Experience, with a focus on vendor information in the cards and timeline.</i> Vendor Integration <i>We will explore the business case around using vendor integration and the positive impact it can have for client processes.</i> Automation using AssignmentPro <i>Join us to discuss the business case around how using automation can make client processes and teams more efficient.</i> What-If Cost Estimates <i>Gain an understanding of how WICE can be used to review candidates and help determine best options for assignments.</i> HR/Client Portal Dashboard, and Vendor Integration <i>Check out the latest HR Portal dashboard and how it can be used to empower your business.</i> 	
3:15	3:30	Conference Wrap-up and Action Planning	