



**sage**

People

# **Engagement & Learning Services**

## **Training Brochure**

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### JANUARY

M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

### FEBRUARY

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12	13	14	15	16	17	18
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26	27	28				

### MARCH

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19	20	21	22	23	24	25
26	27	28	29	30	31	

### APRIL

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30						

### MAY

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### JUNE

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### JULY

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30	31					

### AUGUST

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31						

### SEPTEMBER

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24	25	26	27	28	29	30

### OCTOBER

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22	23	24	25	26	27	28
29	30	31				

### NOVEMBER

M	T	W	T	F	S	S
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

### DECEMBER

M	T	W	T	F	S	S
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17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

#### USA COURSES

MARCH	JUNE	OCTOBER/NOVEMBER
12 & 13: HCM Fundamentals	11 & 12: HCM Fundamentals	22 & 23: HCM Fundamentals
14 & 15: HCM Essentials	13 & 14: HCM Essentials	24 & 25: HCM Essentials
16: Reports & Analytics	15: Reports & Analytics	26: Reports & Analytics
19 & 20: Talent Acquisition Fundamentals	18 & 19: HCM Advanced Admin	29 & 30: HCM Advanced Admin
21: Performance & Talent Fundamentals	20: Integration Fundamentals	31: Integration Fundamentals
22: Integration Fundamentals	21 & 22: Talent Acquisition Fundamentals	1 Nov: Performance & Talent Fundamentals

#### Public Course Venue Locations

UK Courses are held in Reading, UK  
US Courses are held in Atlanta, GA

	UK	US
HCM Fundamentals		
HCM Admin Essentials		
Reports & Analytics		
Talent Acquisition Fundamentals		
Performance & Talent Fundamentals		
HCM Advanced Admin		
Integration Fundamentals		
Public Holiday in UK		
Public Holiday in US		
Public Holiday in UK & US		

# Learning Paths

There are different learning needs depending on the role you have and the life-cycle of your business.

All roles however, are required to attend the HCM Fundamentals course as a prerequisite to attending any further courses.

View your role for a recommended learning path to follow:

Course / Your Role	HCM Fundamentals	Admin Essentials	Reporting & Analytics	Advanced Admin	Integration Fundamentals	Performance & Talent Management	Talent Acquisition Fundamentals
HR Professionals	●		●				
Administrators	●	●	●	●	●		
Recruiters	●						●
Hiring Managers	●						●
People Scientists	●		●				
Talent & Success Planner	●	●				●	
Consultants	●	●	●	●	●	●	●

## HCM Fundamentals Course Overview

### SUMMARY

This instructor-led course is the entry course for Sage | People and is also a requirement for those wishing to continue onto any further Sage | People training courses.

This comprehensive and hands-on course provides the benefit of small class sizes which allow your trainer to enhance your learning experience with familiarization of both the self-service and management systems. This is a prerequisite and basis for all other courses.

### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Clearly understand the difference and navigate between the self-service and the HR Management Portal
- ◆ Add new employees into Sage | People and assign appropriate security profiles
- ◆ Understand the structure of the system through policies and HR departments
- ◆ Gain an understanding of how absence is managed by Sage | People and make adjustments
- ◆ Make mass updates to records in the system
- ◆ Save time by developing a knowledge for how Sage | People handles automation
- ◆ Configure self-service to build content and maintain a brand specific portal
- ◆ Use existing reporting built in for maximum efficiency

### DURATION

- ◆ 2 Days

### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

### AUDIENCE

- ◆ New Customers and Partners
- ◆ Everyone

### PREREQUISITES

- ◆ None

### PACKAGE FOCUS

- ◆ Sage | People HCM

### PUBLIC PRICE

- ◆ £800 per person

### Day One:

#### Workforce Experience Overview

- ◆ Navigation & Terminology
- ◆ Editing Records

#### HR Portal

- ◆ Terminology & Search Panel
- ◆ Team Member, Employment, Salary Records
- ◆ New Hire & Create User
- ◆ Understanding HR Depts & Policies

#### Creating Team Member Records

- ◆ Exploring Related Items
- ◆ Security Profiles
- ◆ Policies & Departments

#### Maintaining Team Member Records

- ◆ Understanding HR Requests
- ◆ Approving HR Requests

### Day Two

#### Absences

- ◆ Absence Types
- ◆ Accruals
- ◆ Absence Adjustments

#### Streamlining Processes & Workflow

- ◆ Creating Views—Mass Update & Bulk Options
- ◆ Action Events Overview
- ◆ Communicating with Team Members
- ◆ Leavers & Rehire

#### Workforce Experience Configuration Essentials

- ◆ Overview—Navigating, Team Member Profile & Org Chart
- ◆ Adding Content & Branding
- ◆ New Processes

#### Reports & Dashboards Essentials

- ◆ Running & Modifying Standard Reports & Dashboards

## HCM Admin Essentials Course Overview

### SUMMARY

This instructor-led course builds on the principles learned in our HCM Fundamentals course. It's suitable for administrators who want to learn more about customizing their self-service & HR Manager's portals. You'll cover topics to extend the Sage | People system by creating custom fields and introducing automation to help the business work more efficiently.

### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Enhance the user experience by customizing the self-service portal to include the fields that your self-service users need to use
- ◆ Facilitate the use of the HR Manager's Portal by modifying page layouts
- ◆ Support the business in collecting correctly formatted data by creating custom fields
- ◆ Reduce the number of manual processes by automating standard email communications, including PDFs and forms
- ◆ Improve the quality of data using workflow rules to update values automatically
- ◆ Maintain your data by mass uploading records from legacy systems.

### DURATION

- ◆ 2 Days

### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

### AUDIENCE

- ◆ Customers and Partners
- ◆ HR Administrators
- ◆ System Administrators

### PREREQUISITES

- ◆ HCM Fundamentals

### PACKAGE FOCUS

- ◆ Sage | People HCM

### PUBLIC PRICE

- ◆ £800 per person

### Day One:

#### Review of WX & HR Manager Portals

- ◆ Checking understanding of terminology used in each portal
- ◆ Navigation around the portals

#### Sage | People Objects

- ◆ What is an object?
- ◆ What data is stored on different objects?
- ◆ How are objects related?
- ◆ Accessing objects

#### Custom Fields

- ◆ What types of custom field are available?
- ◆ Different data types
- ◆ Field creation and settings
- ◆ Field level security/visibility

#### Controlling Visibility of Fields in each Portal

- ◆ Finding Field Sets
- ◆ Using Field Sets to control what can be seen/edited

#### Other Field Settings

- ◆ Field Dependency
- ◆ Data Validation

#### Adjusting HR Manager Portal Page Layouts

- ◆ Modifying the screen layout
- ◆ Mini page layouts

#### Formula fields

- ◆ How to use formula builder
- ◆ Creating mirror fields

#### Renaming Fields

- ◆ When and how to rename

#### Tracking Field Changes

- ◆ How to set up field level history

### Day Two

#### Managing Exchange Rates

- ◆ Reporting currency
- ◆ Changing and applying new exchange rates

#### Automating Communications

- ◆ Creating email templates and letterheads
- ◆ Creating PDF templates
- ◆ Building Action Events

#### Communicating & Collecting Data

- ◆ HCM Forms
- ◆ Where forms and their templates area stored
- ◆ How to modify a form
- ◆ How data is shared with Sage | People

#### Managing Different Working Arrangements

- ◆ Using Workday Patterns to control public holidays and working days

#### Workflow Rules & Approval Processes

- ◆ Levels of automation
- ◆ When to use workflow
- ◆ Evaluation criteria
- ◆ Where are approval processes?

#### Importing Data in Bulk

- ◆ File formats
- ◆ Unique ID
- ◆ Update/Upsert/Insert



## Reports & Analytics Course Overview

### SUMMARY

This 1-day course is based on the fundamentals of report building and people science basics.

The course is aimed at HR professionals who need to produce reports, not only for day-to-day business but also to create in depth dashboards to better shape business decisions.

### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Create valuable reports using people science methodology which will help you answer complicated business questions
- ◆ Have an understanding of what "actionable insight" is and how to make an hypothesis based on the data your system holds
- ◆ Create brand new reports pulling from multiple objects allowing you to report on new fields that have been added to your version of Sage | People
- ◆ Create a "snapshot" object which will help you build point in time reports, this will enable you to pull information from the past to better spot trends
- ◆ Empower managers to make informed decision by adding reports to the self service tool

### DURATION

- ◆ 1 Day

### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

### AUDIENCE

- ◆ New Customers and Partners
- ◆ HR Teams
- ◆ New Administrators

### PREREQUISITES

- ◆ HCM Fundamentals
- ◆ HCM Admin Essentials

### PUBLIC PRICE

- ◆ £400 per person

### Morning Session:

#### Report Planning

- ◆ Sage | People Data Structure & Record Relationships
- ◆ Difference between Views & Reports

#### Run Standard Reports

- ◆ Adjust summary and date filters

#### Report Types

- ◆ Create Custom Report Types

#### Build Reports & Dashboard

- ◆ Summary Headcount Reports
- ◆ Creating Custom Groupings
- ◆ Conditional highlighting
- ◆ Matrix Reports and Formula Fields
- ◆ Report Folders
- ◆ Joined Reports—Employee Contact Details

### Afternoon Session

#### Working with Standard Dashboards

- ◆ Sage | People turnover Component
- ◆ Schedule Dashboards

#### Creating Custom Dashboards

- ◆ Select Dashboard Components
- ◆ Add Dashboard Filters

#### Reporting Snapshots

- ◆ Point in Time Reporting

#### WX Line Manager Analytics

- ◆ Leaver Report

#### Data Quality

- ◆ Data Quality Strategies

## HCM Advanced Admin Course Overview

### SUMMARY

Our 2-day course will look at the more advanced aspects of the Sage | People solution. This course is appropriate for those consulting and implementing Sage | People within their organizations. It includes an extended look at formulas and validation rules as well as an introduction into process builders and strengthens knowledge around automation.

### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Write in-depth formulae to tailor the HR Manager Portal, making it easier to report and draw information from Sage | People
- ◆ Write validation rules to ensure that only the correct data is entered
- ◆ Create workflow rules that will help automate the entry of data freeing up HR teams time
- ◆ Build and design forms to get new starter data into Sage | People as early as possible.

### DURATION

- ◆ 2 Days

### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

### AUDIENCE

- ◆ Experienced HR Administrators

### PREREQUISITES

- ◆ HCM Fundamentals
- ◆ HCM Admin Essentials

### PUBLIC PRICE

- ◆ £800 per person

### Day One:

#### Tailoring the Employee Record

- ◆ Introduction to formula fields
- ◆ Using the Formula Editor
- ◆ Overview Validation Rules

#### Automating HR

- ◆ Custom Workflow Rules
- ◆ Process Builder
- ◆ Action Events & Action Patterns
- ◆ Custom Action Events
- ◆ Action Event Conditions

#### Maintain Team Member History

- ◆ Configure Job History & HR Requests
- ◆ Joined Reports—Employee Contact Details

### Day Two:

#### Automate & Control HR Processes

- ◆ Create Approval Processes
- ◆ Employment details Changes Config
- ◆ Amend & Clone Approval Processes

#### Gathering Employee Data

- ◆ Advanced HCM Form Config
- ◆ Validation Checking
- ◆ Conditional Pages
- ◆ Advanced Data Links

#### Data Imports

- ◆ Data load Job Descriptions & HR Managers
- ◆ Introduction to Excel Connector

## Integration Fundamentals Course Overview

### SUMMARY

Integration Fundamentals is designed for those whose role involves data integration between Sage | People and external services.

Aimed primarily for Sage | People implementers, this course provides a comprehensive overview of the built-in Payflow app and will ease delegates through all the possible configuration and automation options available.

### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Reduce time spent configuring downloading and uploading data files by creating templates for specific external systems
- ◆ Avoid wasted time on file manipulation by using the wide range of specific data file download configurations
- ◆ Enable successful upload of data files from an external system to Sage | People to aid error mitigation
- ◆ Create specific configuration for new starters, leavers and changes-only files
- ◆ Automate data file downloads on a user-defined scheduled basis
- ◆ Set up automatic transfer of payslips from provider to Sage | People self-service via an SFTP server

### DURATION

- ◆ 1 Day

### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

### AUDIENCE

- ◆ Experienced HR Administrators

### PREREQUISITES

- ◆ HCM Fundamentals

### PUBLIC PRICE

- ◆ £400 per person

### Morning Session:

#### Create a Payflow Service

- ◆ Setting up a global template for each external service Service, File and Field level Configuration
- ◆ Configuring download files and mapping relevant fields from HCM

#### Download Testing

- ◆ Examining download files and identifying possible alterations to configuration to achieve desired results

#### Enhancing Download Files

- ◆ Putting filters and other file/field settings into place to achieve the required file output

#### Starters/Leaver File Configuration

- ◆ Running downloads to bring back only new starters or recent leavers

#### Changes Only File Configuration

- ◆ Creating files that contain only data that has changed since a previous data run

### Afternoon Session:

#### Data Groupings File Configuration

- ◆ Introducing grouping and sub-grouping to improve presentation of data files

#### Benefits File Configuration

- ◆ Setting field-level filters to ensure correct values are returned

#### Upload File Configuration

- ◆ Using the learnings from the course so far, translating these setting for upload files

#### Mapping from Upload File to Payroll Lines

- ◆ Uploading files to a staging table in order to keep a record of uploads if required

#### Mapping from Payroll Lines to HCM

- ◆ Moving data from a staging table to update HCM records

#### Payslips

- ◆ Transferring payroll data automatically from a provider into HCM
- ◆ Presenting PDF payslips provided by an external service to Team Members

# Sage | People

## Performance & Talent Fundamentals

### Course Overview

#### SUMMARY

The Performance & Talent Management Fundamentals course will provide an overview of the various performance & talent-related processes available with the Sage | People product. This course is ideal for those who are responsible for managing and/or administering performance and development within their organization.

#### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Encourage workforce engagement through the Recognition (“Shout Out”) process at chosen levels of your organization
- ◆ Provide appropriate access to various performance measurement and development features including:
  - ◆ Objectives
  - ◆ Competency Assessments
  - ◆ Skills
- ◆ Reduce manual collation of data by bringing the above components together into a single performance review
- ◆ Enable intelligent formulation of individual development plans and relate these to a Training Library
- ◆ Create a Talent Plan to identify areas of strengths and needs on any organizational level using the 9-box Grid model
- ◆ Create a Succession Plan to provide clear visibility of any gaps and enable loss-risk planning

#### DURATION

- ◆ 1 Day

#### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

#### AUDIENCE

- ◆ Experienced HR Administrators
- ◆ Talent & Succession Team

#### PREREQUISITES

- ◆ HCM Fundamentals
- ◆ HCM Admin Essentials

#### PUBLIC PRICE

- ◆ £400 per person

## Performance & Talent Fundamentals Contents

### Morning Session:

#### Objectives

- ◆ Configuring who has responsibility for creating, revealing and reviewing individual and corporate objectives

#### Recognition

- ◆ Setting up an easy-to-use "Shout Out" system across various parts of your organization and align them to your brand values

#### Competency Assessments

- ◆ Providing a framework of rateable competencies and allowing managers and other key people to anonymously score against them

#### Skills

- ◆ Creating a library of required and desired skills which can be applied to Team Members and, if necessary, require approval from a qualified colleague

### Afternoon Session:

#### Performance Review

- ◆ Collating information gathered from the morning session to create a single view of an individual's performance

#### Development Planning & Training

- ◆ Taking learning garnered from the Performance Review and other performance information to build a Development Plan

- ◆ Building a library of available Training courses and linking relevant Development Needs to these

#### Talent Plan

- ◆ Enabling managers to draw out a 'potential vs performance' & 'Risk of Loss vs Impact' snapshot of their teams
- ◆ Taking this information from individual teams to provide a company-wide Talent Plan using the 9-box Grid

#### Succession Plan

- ◆ Facilitating managers to be able to formulate a Succession Plan of potential successors and estimated timeframes



#### SUMMARY

Covering the essential elements of Sage | People's recruitment package, this 2-day course is a ideal introduction for Talent Acquisition Managers and administrators who want to learn how to oversee their system and streamline the recruitment process, resulting in the selection of the best candidates, a smoother onboarding and an easier transition from applicant to employee.

#### WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:

- ◆ Control visibility of and access to candidate personal data
- ◆ Reduce the manual input required by creating reusable selection criteria and vacancy information
- ◆ Establish a seamless approval process for the end-to-end recruitment of candidates
- ◆ Simplify and standardize the initial screening procedure
- ◆ Minimize the effort involved in scheduling interviews and assessments
- ◆ Maintain a searchable talent pool to make future recruitment more efficient and successful
- ◆ Provide managers with an easy-to-use self-service portal for requesting and approving vacancies
- ◆ Enhance the onboarding of new employees by transitioning successful candidates to team members, quickly and easily

#### DURATION

- ◆ 2 Days

#### DELIVERY FORMAT

- ◆ Classroom
- ◆ Virtual Classroom (Coming Soon)

#### AUDIENCE

- ◆ Talent Acquisition Managers
- ◆ Recruitment Administrators
- ◆ HR Managers
- ◆ System Administrator
- ◆ Customers & Partners

#### PREREQUISITES

- ◆ HCM Fundamentals

#### PUBLIC PRICE

- ◆ £800 per person

#### Day One:

##### Navigating the Recruiter Portal

- ◆ Terminology used in the Portal
- ◆ Using and adding tabs

##### The Recruitment Process

- ◆ Identifying the steps

##### Managing Vacancies

- ◆ Where is your vacancy going to be visible?
- ◆ Creating new vacancy records, including using templates
- ◆ Vacancy approvals
- ◆ Making vacancies available to candidates

##### The Applicant Portal

- ◆ Registering
- ◆ Applying for jobs
- ◆ Referring applicants
- ◆ Tracking your application

##### Interviews & Assessments

- ◆ Setting up stages to reflect your process
- ◆ Rating applications against criteria
- ◆ Maintaining a talent pool

##### Job Offers & Hiring

- ◆ Managing the approval process
- ◆ Moving to onboarding

#### Day Two:

##### Maintaining Security

- ◆ Controlling permissions for Hiring Managers

##### Aligning Sage | People with Your Recruitment Process

- ◆ Adding custom fields
- ◆ Setting up automation and approval processes
- ◆ Controlling visibility of information

##### Self-service Portal Configuration

- ◆ Allowing Hiring Managers to request and manage their vacancies
- ◆ Presenting new vacancies to existing employees

##### The Applicant/Agency Portal

- ◆ Branding in line with your company image

##### Email/PDF Templates

- ◆ Creating personalized templates to engage candidates throughout the recruitment process

# Sage | People Enablement & Learning Services

## FAQs

### WHAT DO I NEED TO BRING TO CLASS?

- ◆ You need to ensure that you have your laptop and prior to your course we will send you information appropriate for your course.

### WHAT ARE THE TIMINGS OF THE CLASSES?

- ◆ Our standard courses are 9:00am-5:00pm or until course material is finished with a lunch.

### IS THERE A DRESS CODE FOR THE CLASSES?

- ◆ No, but come to course comfortable.

### IS CATERING PROVIDED ?

- ◆ Yes for public courses we do provide catered lunches.

### DO YOU OFFER ON-SITE COURSES ?

- ◆ Yes, Please contact [training@sagepeople.com](mailto:training@sagepeople.com) for information.