



**sage**

People

## **Learning Services**

**UK & USA Customer Training Brochure—H1 2019**

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## TRAINING SESSION DETAILS

### WHAT ARE THE TIMINGS OF THE COURSES?

Instructor-led sessions run from 9am to no later than 5pm. Please make your way to the main Gateway building reception area, for 9am on the day of your course. The reception team will greet you and issue you with a key card. Your trainer will meet you in reception and we aim to get started for 9:15am. As well as a one-hour lunch break, we will have a morning and afternoon tea break; your trainer will advise on timings on the day.

### WHAT DO I NEED TO BRING WITH ME?

Please ensure that you have your laptop, charger and any adaptor plugs with you on the day. We will provide you with access to our WiFi network. During the training session, you will also need access to an email account; you will use this for testing and training purposes. Some customers have security settings on their laptop which won't allow access to internal emails when not on company WiFi—if this is the case, please be prepared to use a personal email account.

### IS THERE A DRESS CODE FOR THE CLASSES? WHAT FORMAT WILL THE COURSES TAKE?

There is no dress code - please feel free to wear what you feel comfortable in. The sessions are largely interactive and do not follow a point + click format. Your trainer will want you to get 'involved' in the system and practice what you're learning during the session.

### IS CATERING PROVIDED?

Our public courses are catered for, so there's no need to worry about bringing lunch. Once you've booked onto a course, we'll let you know how to share any information regarding dietary requirements. We also provide tea and coffee facilities during the sessions and there is a small café downstairs in the reception area of the Gateway building, should you need anything else.

### DO YOU OFFER ON-SITE COURSES?

Yes we can come and deliver on your site - please contact [training@sagepeople.com](mailto:training@sagepeople.com) for more information.

### HOW DO I BOOK ONTO ONE OF THE COURSES?

As of 2019 for all course bookings, including eLearning courses, please now use our Training Course Booking form, [found here](#).

## LOCATION INFORMATION

### SAGE READING OFFICE

Sage People moved to **Thames Valley Science Park** in early 2018. Our office neighbours include several cutting-edge laboratory-based R&D companies as well as the brand new Rutherford Cancer Centre. Our full postal address is:

**Sage People, 1 Collegiate Square, Thames Valley Science Park, Shinfield, Reading RG2 9LH**

We are less than 30 minutes from Heathrow and only a short taxi-ride away from Reading town centre and the main train station. 'Winnersh' and 'Winnersh Triangle' train stations are close by, however they only serve local stopping services. We recommend anyone arriving by train, to use Reading's main station and take public transport or taxi to our offices.

If you're training with us for longer than one day and will be staying overnight, the training team can provide a full list of nearby hotels. The most commonly used hotels outside of the town centre include: Holiday Inn Reading South, Hilton Reading and Travelodge Reading Whitley.



**JANUARY**

M	T	W	T	F	S	S
<del>1</del>	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**

M	T	W	T	F	S	S
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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
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**MARCH**

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**APRIL**

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<del>22</del>	23	24	25	26	27	28
29	30					

**MAY**

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**JUNE**

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17	18	19	20	21	22	23
24	25	26	27	28	29	30

**Course Key / Number of Days**

HCM Admin Essentials **2**

Reports & Analytics **1**

Talent Acquisition Fundamentals **2**

Performance & Talent Fundamentals **1**

Public Holiday ~~X~~



## **TRAINING SESSION DETAILS**

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### **HOW DO I BOOK ONTO ONE OF THE COURSES?**

As of 2019 for all public customer bookings, please now use our Training Course Booking form, [found here](#).

## **LOCATION INFORMATION**

### **SAGE MID-TOWN ATLANTA OFFICE**

The Sage People Mid-town Atlanta office is located near Atlantic Station. The area is well known for restaurants, stores and hotels. The full postal address is:

**271 17th St NW, Atlanta, GA 30363, USA**

We are about 40 minutes from ATL Hartsfield-Jackson Airport and only a short bus ride away from the nearest MARTA station.

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Public Holiday ~~X~~

# Sage | People

## HCM Fundamentals eLearning

### SUMMARY

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

This comprehensive and interactive eLearning course provides the benefit of learning in your own time and the ability to revisit the course to consolidate what you've learnt. This course ends with a quiz so you can test out your knowledge. 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 WX portal 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

### Contents:

#### Sage People—An Introduction

#### Basic Navigation

- ◆ The Workforce Experience (WX)
- ◆ The HR Manager Portal

#### Team Members

- ◆ The Team Member Record
- ◆ Basic Data Structure
- ◆ Creating a New Team Member
- ◆ User Profiles

#### Defining People Groups and Regionalization

- ◆ HR Departments and Policies

#### Employment Changes

- ◆ Mass Update
- ◆ Organization Tab
- ◆ HR Requests

#### Absence & Vacation Fundamentals

- ◆ Work Days Patterns & Absence Accrual Rules
- ◆ Manually Adjusting Absences

#### Communications

- ◆ Action Events
- ◆ Send Manual Communications

#### Team Member Termination & Rehire

- ◆ Team Member Termination
- ◆ Rehire Process

#### Basic WX Configuration

- ◆ Adding WX Services & Processes
- ◆ Adding an Internal Communication
- ◆ WX Themes

#### Reports Basics

### DURATION

2-3 Hours

### DELIVERY FORMAT

eLearning Only

### AUDIENCE

New Customers and Partners  
Everyone

### PREREQUISITES

None

### PACKAGE FOCUS

Sage | People HCM

### PUBLIC PRICE

Free of Charge

# Sage | People

## HCM Admin Essentials

### 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 WX self-service & HR Manager portals. You'll cover topics to personalise and 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 with data validation
- ◆ 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.

### Day One:

Review of WX & HR Manager Portals

- ◆ Terminology and language refresh

Sage | People Objects

- ◆ Object and record concept
- ◆ What data is stored on different objects?
- ◆ How are objects related?

Custom Fields and Field Visibility

- ◆ Field types, creation and settings
- ◆ Controlling which fields are shown using Field Sets
- ◆ Field Dependency
- ◆ Data Validation

Adjusting HR Manager Portal Page Layouts

- ◆ Modifying the screen and '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

- ◆ Using a 'Reporting' currency
- ◆ Changing and applying new exchange rates

Automating Communications

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

Communicating & Collecting Data

- ◆ HCM Forms—storage and templates
- ◆ How to modify a form
- ◆ How data is shared with Sage | People

Workflow Rules & Approval Processes

- ◆ Which level of automation is appropriate?
- ◆ When to use workflow and evaluation criteria
- ◆ What are approval processes?

Importing Data in Bulk

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

### DURATION

2 Days

### DELIVERY FORMAT

Classroom

### AUDIENCE

Customers and Partners  
HR Administrators  
System Administrators

### PREREQUISITES

HCM Fundamentals

### PACKAGE FOCUS

Sage | People HCM

### PUBLIC PRICE

£800 / US \$1,000 per person



# Sage | People

## Reports & Analytics

### SUMMARY

This 1-day course begins with some People Science basics and looks to develop report-writing skills.

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 a 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

#### 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

### DURATION

1 Day

### DELIVERY FORMAT

Classroom

### AUDIENCE

New Customers and Partners  
HR Teams  
New Administrators

### PREREQUISITES

HCM Fundamentals

### PUBLIC PRICE

£400 / US \$500 per person

#### Afternoon Session

##### Working with Standard Dashboards

- ◆ Sage | People turnover Component
- ◆ Schedule Dashboards

##### Creating Custom Dashboards

- ◆ Select Dashboard Components
- ◆ Add Dashboard Filters

##### Data Quality

- ◆ Data Quality Strategies

### 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

#### Day One:

##### Navigating the Recruiter Portal

- ◆ Terminology 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 and applying for jobs
- ◆ Referring applicant and tracking applications

##### Interviews & Assessments

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

##### Job Offers & Hiring

- ◆ Managing the approval process and 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

##### WX Self-service Portal Configuration

- ◆ Enable Hiring Managers to request/manage 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

### DURATION

2 Days

### DELIVERY FORMAT

Classroom

### AUDIENCE

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

### PREREQUISITES

HCM Fundamentals

### PUBLIC PRICE

£800 / US \$1,000 per person

### 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/administering performance and development within their organization.

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

- ◆ Influence workforce engagement through implementing the Recognition process
- ◆ Provide appropriate access to various performance measurement and development features including: Objectives, Competency Assessments and 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 improve loss-risk planning

#### Morning Session:

##### Objectives

- ◆ Configuring who has responsibility for creating, sharing and reviewing individual-level and organisational-level objectives

##### Recognition

- ◆ Setting up an easy-to-use “Shout Out” system across various parts of your organization and aligning the recognition 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

- ◆ Using Performance Review information to build a PDP
- ◆ 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

### DURATION

1 Day

### DELIVERY FORMAT

Classroom

### AUDIENCE

Experienced HR Administrators  
Talent & Succession Team

### PREREQUISITES

HCM Fundamentals  
HCM Admin Essentials

### PUBLIC PRICE

£400 / US \$500 per person