



sage

People

Learning Services

UK & USA Customer Training Brochure— 2019

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PLEASE NOTE: As of 2019, all requests from customers for training should be submitted via the online form, [which can be found here](#).



TRAINING SESSION DETAILS

WHAT ARE THE TIMINGS OF THE COURSES?

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. 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 for more information.

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 READING OFFICE

Our Sage People Reading offices are based at **Thames Valley Science Park (TVSP)**. 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.



UK CUSTOMER PUBLIC TRAINING CALENDAR - H1 2019

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
JANUARY		✕	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			

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
FEBRUARY					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			

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
MARCH					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

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
APRIL	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	✕	20	21
	✕	23	24	25	26	27	28
	29	30					

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
MAY			1	2	3	4	5
	✕	7	8	9	10	11	12
	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
	✕	28	29	30	31		

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
JUNE						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

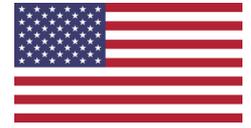
UK CUSTOMER PUBLIC TRAINING CALENDAR - H2 2019

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
JULY	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				

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
AUGUST				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
	✕	27	28	29	30	31	

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
SEPTEMBER							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							

- HCM Admin Essentials
- Talent Acquisition (Recruit) Fundamentals
- Reports & Analytics
- Performance & Talent Fundamentals
- Advanced Admin
- ✕ Public Holiday



TRAINING SESSION DETAILS

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HOW DO I BOOK ONTO ONE OF THE COURSES?

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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.

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.



USA CUSTOMER PUBLIC TRAINING CALENDAR - H1 2019

JANUARY	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
		X	2	3	4		5	6
	7	8	9	10	11	12	13	
	14	15	16	17	18	19	20	
	X	22	23	24	25	26	27	
	28	29	30	31				

FEBRUARY	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
						1	2	3
	4	5	6	7	8	9	10	
	11	12	13	14	15	16	17	
	X	19	20	21	22	23	24	
	25	26	27	28				

MARCH	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
						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	

APRIL	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	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					

MAY	Mon	Tue	Wed	Thu	Fri	Sat	Sun
			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
	X	28	29	30	31		

JUNE	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
							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	

USA CUSTOMER PUBLIC TRAINING CALENDAR - H2 2019

JULY	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	X	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				

AUGUST	Mon	Tue	Wed	Thu	Fri	Sat	Sun
				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	

SEPTEMBER	Mon	Tue	Wed	Thu	Fri	Sat	Sun
							1
	X	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							

- HCM Admin Essentials
- Talent Acquisition (Recruit) Fundamentals
- Reports & Analytics
- Performance & Talent Fundamentals
- Advanced Admin
- Public Holiday

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

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
- ◆ Workday Patterns

Maintaining Team Member Records

- ◆ Creating Views—Mass Update & Bulk Options
- ◆ Understanding HR Requests
- ◆ Approving HR Requests

Absences

- ◆ Absence Types and Accruals
- ◆ Work Day Patterns
- ◆ Absence Adjustments

Streamlining Processes & Workflow

- ◆ 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

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

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

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

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

Sage | People

HCM Advanced Admin

SUMMARY

This 2-day course looks at the more advanced aspects of the Sage | People solution. The course is appropriate for those consulting and involved in the implementation of Sage | People within their organisations. 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.

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

DURATION

2 Days

DELIVERY FORMAT

Classroom

AUDIENCE

Experienced HR Administrators
Talent & Succession Team

PREREQUISITES

HCM Fundamentals
HCM Admin Essentials

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training@sagepeople.com

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