

# Sage People Learning Services

*Training Brochure*

*2020*



# Key things about learning



Sage People now offer Virtual Classes. Whilst the **content** in our classes remains the same as the Face-to-Face (F2F) offering, the Virtual Class **format** is different.



Each course has been broken down into different 'Parts', lasting roughly 3.5 hours. Each of these 'Parts' is then broken down into short, 30-minute learning segments. We've designed the courses to run in a specific order as each part builds upon knowledge from the last. Therefore, you must attend each Course's 'Parts' in **sequential order**.



We train in **trial orgs**, rather than your own systems, so you can play and experiment without the risk of affecting real-life team members.



There'll be a maximum of 6 delegates to ensure plenty of one-to-one help and attention from the Training Consultant, as well as opportunities to work alongside fellow trainees in breakout rooms.

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# About Sage People Learning Services

Our team of Training Consultants are ready to enable Sage People customers who want to get the most from the system, with our comprehensive training programs.

From the beginning of your learning journey; using our online eFundamentals course, to attending tailored, role-based sessions that can help you analyse workforce data, Sage People Learning Services can offer learning interventions throughout your implementation and after 'go-live'.





## Persona-led training




2020 will see us transform our training programs into context-based learning sessions.

Our focus will shift to addressing the specific needs of HR job roles, learning functionality relevant to context, tasks and responsibility.

On the next page, we'll explain a little more about each persona, to help guide you through selecting the correct course – based on what you need to be able to achieve in your role.

Enquiries: [training@sagepeople.com](mailto:training@sagepeople.com)

# Which persona represents my role?

Learning Services Persona	Typical real-world job titles that represent this persona	The Sage People Security Profile this persona holds	Typical day-to-day tasks that this persona will undertake
 HR Manager	HR Business Partner, HR Manager, HR Generalist, HR Lead	HR Manager HR Administrator	Add / terminate team members, approve HR requests, change/update salaries, data admin/integrity, send PDFs and forms, share HR comms, access + edit reports, maintain absence records
 System Admin	HRIS Analyst, HR Systems Administrator	System Admin	Add new fields, use formulas to drive automation, create email templates & letterheads, configure policies and test enhancements, edit page layouts and system 'look'
 Recruiter	Recruitment Administrator, Recruitment Manager	Recruit Manager Recruit Admin	Raise vacancies, send/approve vacancies, advertise vacancies, add agencies to the system, progress / assess candidates, send job offers

**If you're unsure which persona is right for you, please watch [this video](#)**

Enquiries: [training@sagepeople.com](mailto:training@sagepeople.com)

# Which course is right for me?

Which persona?	Implementation Stage and the Right Course				
	Discovery	Build	UAT*	Go Live	After...
<b>HR Manager</b>	HCM Fundamentals (eFundamentals)	HCM for HR Managers	Focus on UAT only	Reports & Analytics	
<b>System Admin</b>	HCM Fundamentals (eFundamentals)	HCM for System Admins	Focus on UAT only	Reports & Analytics	Advanced HCM for System Admins
<b>Recruiter</b>	HCM Fundamentals (eFundamentals)	Talent Acquisition (Recruit)	Focus on UAT only		
If you are also implementing Performance & Talent we recommend this workshop	Performance & Talent Workshop				

If you're unsure which course is right for you, please watch [this video](#)

\*User acceptance testing

Enquiries: [training@sagepeople.com](mailto:training@sagepeople.com)

# Costs and Training Environment

## Public Virtual Courses

You'll learn alongside customers from other organizations. There will be a maximum of 6 delegates in the session.

Course	Cost per delegate
HCM for HR Managers	£ 800
	€ 960
	\$ 1,000
HCM for System Admins	£ 800
	€ 960
	\$ 1,000
Reports & Analytics	£ 400
	€ 480
	\$ 500

Course	Cost per delegate
Talent Acquisition Fundamentals	£ 400
	€ 480
	\$ 500
Performance & Talent Management	£ 400
	€ 480
	\$ 500
Advanced Admin	£ 400
	€ 480
	\$ 500

We ask you to book at least **2 weeks in advance** to ensure you get your preferred time and you have enough time to complete the eFundamentals course.

[Book a training course HERE](#)

Enquiries: [training@sagepeople.com](mailto:training@sagepeople.com)



# Virtual Classroom Global Time Slots



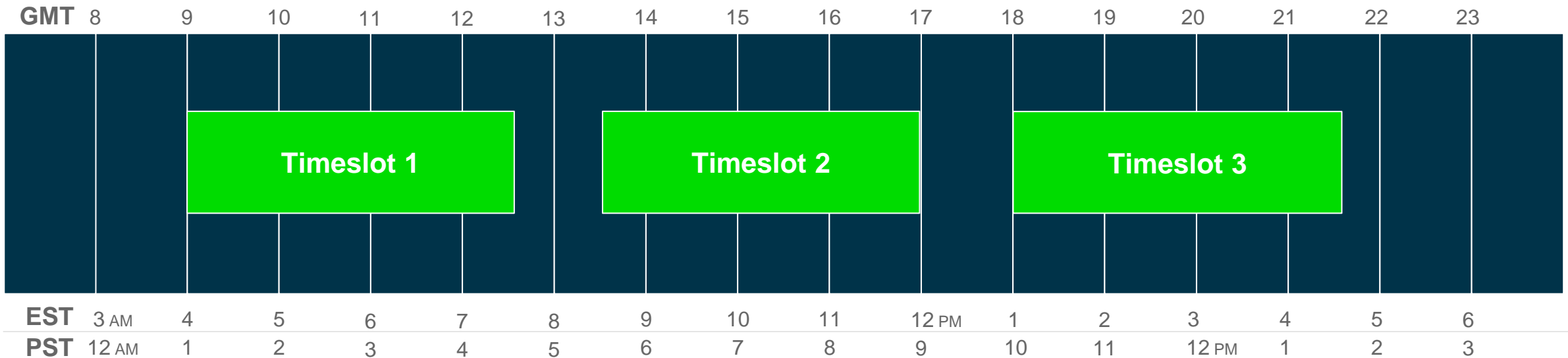
**Timeslot 1**  
09:00 – 12:30 BST



**Timeslot 2**  
13:30 – 17:00 BST



**Timeslot 3**  
18:00 – 21:30 BST



**Timeslot 1**  
4:00a – 07:30a EDT  
1:00a – 04:30a PDT



**Timeslot 2**  
8:30a – 12:00p EDT  
5:30a – 9:00a PDT



**Timeslot 3**  
1:00p – 4:30p EDT  
10:00a – 1:30p PDT



# Public Virtual Class Calendar September

Course	Part 1			Part 2			Part 3			Part 4		
	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3
HCM for HR Managers	Tues 1st* Mon 7th*	Mon 21st*	Mon 21st	Thurs 3rd* Wed 9th*	Wed 23rd*	Wed 23rd	Mon 7th* Fri 11th*	Fri 25th*	Fri 25th	Wed 9th* Mon 14th*	Tues 29th*	Tues 29th
HCM for System Administrators	Mon 21st*	Wed 2nd	Thurs 3rd	Wed 23rd*	Fri 4th	Mon 7th	Fri 25th*	Tues 8th	Wed 9th	Tues 1st Tues 29th*	Thurs 10th	Fri 11th
Reports & Analytics	Mon 7th	Tues 22nd	Wed 2nd	Wed 9th	Thurs 24th	Fri 4th	/	/	/	/	/	/
Talent Acquisition (Recruit)	Mon 28th*	Tues 8th		Wed 30th*	Thurs 10th		/	/	/	/	/	/
Performance & Talent Workshop		Tues 1st			Thurs 3rd		/	/	/	/	/	/
Advanced HCM for System Admins		Tues 8th			Fri 11th		/	/	/	/	/	/

**Timeslot 1**  
 BST  
 9:00 – 12:30  
 EDT  
 4:00a – 7:30a  
 PDT  
 1:00a – 4:30a

**Timeslot 2**  
 BST  
 13:30 – 17:00  
 EDT  
 8:30a – 12:00p  
 PDT  
 5:30a – 9:00a

**Timeslot 3**  
 BST  
 18:00 – 21:30  
 EDT  
 1:00p – 4:30p  
 PDT  
 10:00a – 1:30p

\*Class is fully booked

# Public Virtual Class Calendar October

Course	Part 1			Part 2			Part 3			Part 4		
	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3	Time slot 1	Time slot 2	Time slot 3
<b>HCM for HR Managers</b>	Tues 6th	Mon 5th	Tues 6th	Thurs 8th	Wed 7th	Fri 9th	Mon 12th	Mon 12th	Tues 13th	Wed 14th	Wed 14th	Thurs 15th
<b>HCM for System Administrators</b>	Tues 20th	Mon 19th	Tues 20th	Thurs 22nd	Wed 21st	Thurs 22nd	Mon 26th	Tues 27th	Tues 27th	Wed 28th	Thurs 29th	Thurs 29th
<b>Reports &amp; Analytics</b>	Mon 5th	Tues 13th	Mon 26th	Wed 7th	Thurs 15th	Wed 28th						
<b>Talent Acquisition (Recruit)</b>	Tues 13th	Mon 26th		Thurs 15th	Wed 28th							
<b>Performance &amp; Talent Workshop</b>		Tues 6th Mon 19th*			Thurs 8th Wed 21st*							
<b>Advanced HCM for System Admins</b>		Tues 13th			Thurs 15th							

**Timeslot 1**  
 BST  
 (from 26<sup>th</sup> Oct GMT)  
 9:00 – 12:30  
 EDT  
 4:00a – 7:30a  
 PDT  
 1:00a – 4:30a

**Timeslot 2**  
 BST  
 (from 26<sup>th</sup> Oct GMT)  
 13:30 – 17:00  
 EDT  
 8:30a – 12:00p  
 PDT  
 5:30a – 9:00a

**Timeslot 3**  
 BST  
 (from 26<sup>th</sup> Oct GMT)  
 18:00 – 21:30  
 EDT  
 1:00p – 4:30p  
 PDT  
 10:00a – 1:30p

# Course: HCM Fundamentals (eFundamentals)

Persona audience: All

sage

People

## Course Purpose:

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 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 to test out your knowledge.

## After completing the training you'll be able to:

- Differentiate between the 'Self-Service WX' and 'HR Manager' portals
- Add new Team Members with the appropriate security access level
- Utilise Policies and HR Departments to manage the workforce more effectively
- Get to know how Sage | People manages absence and how to make adjustments
- Save time by developing a knowledge for how Sage | People handles automation
- Configure WX to build content and maintain an on-brand portal

## How to access HCM eFundamentals?

[Click here to access the instructions](#)

- Questions about Training Course content  
[training@sagepeople.com](mailto:training@sagepeople.com)
- Questions about finding Account Numbers  
[customercommunity@sagepeople.com](mailto:customercommunity@sagepeople.com)

# Course: HCM for HR Managers (4-timeslot course)

Persona audience: HR Manager

## Course Purpose:

This course provides a holistic guide on how to run HR 'Business as Usual' processes using Sage People. In addition, we cover ways of effectively communicating with your workforce and empower you to be more self-sufficient.

[Book a training course HERE](#)

## Course Content:

- HR Departments (Action roles)
- Policies
- Absence and Time Off
- Manual Absence Adjustments
- HR Requests
- Mass Update vs. Organization
- Cross-Reporting vs. Delegation
- Job History / Salary History
- Action Events
- PDF Templates
- HCM Forms
- WX Processes
- Internal Communications
- HR Noticeboards
- Exchange Rates
- Data Loader
- Views



# Course: HCM for System Admins (4-timeslot course)

Persona audience: System Admin

## Course Purpose:

This course is ideal for System Administrators who want to learn more about customizing their WX Self-Service and HR Manager portals as well as learning more about the possibilities of automation.

[Book a training course HERE](#)

## Course Content:

- Creating/Editing Fields
- Formula Fields
- Relabelling Fields
- Global Picklists
- Field Sets
- Field Dependencies
- Field Validation
- HR Portal Page Layouts
- Field Level Tracking
- Combo Fields
- Email Templates / Letterheads
- Workflows
- Approval Processes
- Views

# Course: Reports & Analytics (2-timeslot course)

Persona audience: HR Manager and System Admin

sage

People

## Course Purpose:

This one-day course begins with a look at ‘People Science’ and aims to challenge delegates to ask questions and answer hypotheses, rather than just “running reports”.

[Book a training course HERE](#)

## Course Content:

- Planning your Sage | People reports
- Difference between Views & Reports
- Run standard report types
- Working with Dashboards
- Build Reports & Dashboards
  - Summary headcount reports
  - Creating Custom Groupings
  - Conditional Highlighting
  - Report folder structure
  - Joined reports
- Scheduling and Subscribing to Reports
- Using Sage | People Charts
- Reports in WX
  - The 3 step process
  - End-user experience

Enquiries: [training@sagepeople.com](mailto:training@sagepeople.com)

# Course: Advanced HCM for System Admins (2-timeslot course)

Persona audience: System Admin

## Course Purpose:

This course is appropriate for those consulting and involved in the implementation of Sage | People. It includes an extended look at formulas and validation rules and introduction into process builders.

[Book a training course HERE](#)

## Course Content:

- Process Builder (PB)
- Custom Action Events w/ PB
- Conditional Communications
- HCM Forms in WX
- Data Validation in HCM Forms
- Moving HCM Form Data
- Conditional Responses in HCM Forms
- Configuring HR Requests
- PDF Conditions
- Advanced Field validation
- Advanced Formulas

# Course: Talent Acquisition (Recruit) (2-timeslot course)

Persona audience: Recruiter

## Course Purpose:

An ideal introduction for Talent Acquisition Managers and Recruiters who want to learn how to oversee their system and streamline the recruitment process.

[Book a training course HERE](#)

## Course Content:

- Navigating the Recruiter Portal
- The Recruitment Process
- Managing Vacancies
- Viewing an Applicant Portal
- Job Offers & Hiring
- Interviews & Assessments
  - Setting up interview stages
  - Rating applications against criteria

# Course: Performance & Talent Workshop (2-timeslot course)

Persona audience: HR Manager

## Course Purpose:

An overview of the various performance & talent-related processes available with the Sage | People product.

[Book a training course HERE](#)

## Course Content:

- Objectives
  - Determine who can create objectives
- Recognition
  - Setting up a “Shout Out” system
- Competency Assessments
  - Creating a Framework of rateable competencies
- Skills
  - Creating a library of required skills
  - Configure approval of skills
- Performance Reviews
  - A single view of employee performance
- Development Plans & Training
  - Building a PDP from employee reviews
  - Managing a Training course library
- Talent Planning
  - Potential vs. Performance snapshots
  - Risk of Loss vs. Impact snapshots
- Succession Planning
  - Declaring successors and timelines



# Meet the training consultants



**Johnathan Benson**  
Senior Training Consultant

**Customers about Johnathan:**

*“Jonathan was fantastic. So easy to remain engaged with him, he was helpful and felt I could ask as many questions as needed.”*

*“Brilliant instructor - really engaging and worked to many learning styles. I found him very approachable too.”*



**Ceslee Foster**  
Training Consultant

**Customers about Ceslee:**

*“Ceslee did a marvellous job of moving things along at a good pace, checking for understanding and didn't mind explaining things again quickly.”*

*“Ceslee is a great instructor. She gives very clear explanations. She is dynamic, patient.”*



**Andrew Pearce**  
Training Consultant

**Customers about Andrew:**

*“Andrew was great - explained things well, was open to questions and was very knowledgeable about the system.”*

*“Andrew has a great style and manner for a trainer and paced the session really well.”*



**Clay Stauffer**  
Senior Training Consultant

**Customers about Clay:**

*“Thank you Clay for the training - you made it very useful, interesting and fun at the same time!”*

*“Clay was fantastic. Very knowledgeable and entertaining. Would recommend for any client.”*



**Ryan Schorr**  
Senior Training Consultant

**Customers about Ryan:**

*“Ryan's insights to reporting and analytics in general is outstanding. His ability to connect those insights to the Sage/Salesforce platform specifically is invaluable.”*

*“Ryan was a great trainer who made the week educational and enjoyable.”*