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SayPro Sage 300 People Trainings

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1.SayPro Introduction to Sage 300 People System Training

Objectives:

- Understand the purpose and features of the Sage 300 People system.
- Learn how to navigate the Sage 300 People interface.
- Familiarize with system setup, configuration, and user roles.
- Understand the security protocols and access control mechanisms in place.

Topics Covered:

1. **Overview of Sage 300 People**
    - **What is Sage 300 People?**
      Sage 300 People is a comprehensive HR and payroll management solution designed to streamline processes, automate HR tasks, and improve compliance and reporting.
    - **Key Features and Benefits**
        - Employee management
        - Payroll management
        - Performance and leave tracking
        - Reporting and analytics
        - Self-service portals for employees and managers

- **Target Audience**
  Ideal for HR departments, payroll administrators, and senior managers looking to optimize HR processes.

System Navigation and User Interface

- **User Dashboard Overview**
  The dashboard provides quick access to key features such as payroll, leave management, employee records, and reports.
- **Navigating Sage 300 People**
  - Menu options and navigation bar
  - Setting up workstations and user preferences
  - Customizing the interface for better usability
- **System Preferences and Settings**
  - Personalizing the interface
  - Configuring time zone, language, and date formats
  - Adjusting display settings for improved navigation

System Setup and Configuration

- **Installing Sage 300 People**
  A step-by-step guide to install and configure the Sage 300 People software, ensuring it is ready for use.
- **Setting Up Company Profiles**
  - Creating a company profile for accurate payroll processing and employee management.
  - Defining company structures, departments, and business units.
- **Configuring Payroll and Leave Settings**
  - Setting up payroll cycles and tax parameters.
  - Customizing leave types, policies, and approvals.
  - Enabling integration with accounting systems.

Security and Access Control

- **User Roles and Permissions**
  Defining different user roles within Sage 300 People, such as HR managers, payroll administrators, and employees.
    - Configuring role-based access control to restrict sensitive data.
- **Managing User Access**
    - Adding, modifying, or deactivating user accounts.
    - Assigning specific permissions for data access and actions within the system.
- **Data Security Best Practices**
    - Importance of data encryption and backup strategies.
    - Implementing password policies and two-factor authentication for added security.

Practical Exercise:

1. **Logging into the Sage 300 People System**
    - Learn how to securely log into the system and navigate the dashboard.
2. **Setting Up a Company Profile**
    - Create a company profile, including adding company details, defining organizational structure, and setting payroll parameters.
3. **Configuring User Roles and Permissions**
    - Configure multiple user roles (HR Manager, Payroll Administrator, Employee) and assign the appropriate permissions.
4. **Exploring System Preferences and Settings**
    - Customize your user interface, set up language preferences, and adjust date/time formats.

Assignment:

- **Report on Sage 300 People's Key Benefits and Features**
  📌 Write a report discussing the key features of Sage 300 People and how they benefit HR departments in streamlining operations. Focus on the system's ability to improve payroll accuracy, performance tracking, and employee engagement.

Quiz:

1. **What are the key features of Sage 300 People?**
   - a) Payroll management
   - b) Employee self-service portals
   - c) Performance reviews
   - d) All of the above
2. **How do you create a company profile in Sage 300 People?**
   - a) Through the Settings menu
   - b) Using the Administration console
   - c) Via the Payroll module
   - d) Using the Dashboard
3. **Which of the following is an important security measure in Sage 300 People?**
   - a) Encrypting data
   - b) Allowing all employees full access to HR data
   - c) Disabling user roles
   - d) Removing all security protocols

2. WebSS Interface and Setup Training

Objectives:

- Understand the Web Self-Service (WEBs) interface and its purpose.
- Learn how to configure and customize WEBs for employees and managers.
- Explore advanced settings such as approval workflows and notifications.
- Troubleshoot common WEBs issues and optimize user experience.

Topics Covered:

1. **Introduction to WebSS (Web Self-Service)**
   - **What is WebSS?**
     WebSS is a self-service portal within Sage 300 People that allows employees and managers to manage their HR-related tasks online, including leave requests, payroll information, and performance reviews.
   - **Key Features of WebSS**
     - Leave requests and approvals
     - Viewing and updating personal information
     - Viewing payslips and tax information
     - Manager functionality, including performance reviews and team data
   - **Benefits of WebSS**
     - Increases employee autonomy

  - Reduces administrative burden for HR
  - Improves workflow efficiency by automating requests and approvals

Setting Up WebSS for Employees and Managers

- **Creating WebSS Profiles**
  - Define employee profiles and roles for WebSS access.
  - Set up manager profiles to enable approval capabilities.
  - Assign permissions and access levels for different users.
- **Configuring WebSS Permissions**
  - Enable or disable specific features for employees and managers.
  - Customize what data employees and managers can view and modify.
  - Assign access to specific modules, such as leave, payslips, and performance reviews.

Leave Management through WebSS

- **Leave Request Process**
  - How employees can request leave through the WebSS portal.
  - Setting leave types (vacation, sick leave, etc.).
  - Configuring leave balances and approval workflows.
- **Manager Approvals**
  - How managers can approve or reject leave requests through WebSS.
  - Setting up notifications for leave requests and approvals.

Employee Self-Service Functions

- **Viewing Personal Information**
  - Employees can access and update their personal information, such as contact details and emergency contacts.
  - Custom fields and data privacy considerations.

- **Viewing Payslips and Tax Information**
  - Employees can view and download their payslips, tax information, and payroll history.
  - Configuring payslip templates and payroll notifications.

Approval Workflows and Notifications

- **Creating Approval Workflows**
  - Set up approval workflows for leave requests, expense reports, and performance reviews.
  - Customizing workflow levels (e.g., direct manager, HR approval).
  - Setting up automatic notifications for each step of the workflow.
- **Notification Settings**
  - Enable email or SMS notifications for key actions such as leave requests, approvals, or status updates.
  - Customize notification templates for various user actions.

Troubleshooting Common WebSS Issues

- **Login and Access Issues**
  - Resolving problems with logging into WebSS (e.g., password resets, permissions).
  - Troubleshooting login errors and access restrictions.
- **Performance Problems**
  - Addressing slow load times or failed submissions.
  - Optimizing WebSS settings for better performance.
- **Compatibility Issues**
  - Ensuring WebSS is compatible with browsers and devices used by employees.

Practical Exercises:

1. **Configuring WebSS for an Employee and Manager**
    - Create an employee and manager profile in WebSS, assign access permissions, and enable features such as leave requests and performance reviews.
2. **Leave Request Simulation**
    - Submit a leave request as an employee, ensuring the leave type, dates, and approvals are set correctly.
    - Have a manager approve the leave request through their WebSS interface.
3. **Setting up an Approval Workflow**
    - Create a custom approval workflow for leave requests and performance evaluations.
    - Test the workflow to ensure notifications are sent and approvals can be tracked properly.
4. **Troubleshooting WebSS Login Issues**
    - Simulate a login issue, such as forgotten password, and walk through the troubleshooting process to resolve it.

Assignment:

- **Develop a WebSS User Manual**
  📌 Write a user manual for employees explaining how to use WebSS for managing leave, viewing payslips, and updating personal information. Include common troubleshooting tips.

Quiz:

1. **Which of the following is a feature of WebSS?**
    - a) Employee self-service for leave requests
    - b) Payroll management

- c) Advanced reporting and analytics
- d) Only managers can use the portal

2. **What is the purpose of approval workflows in WebSS?**
   - a) To allow employees to approve their own leave requests
   - b) To define the process for managers to approve employee requests
   - c) To eliminate the need for notifications
   - d) To restrict employees from accessing their personal information
3. **What is a common troubleshooting step if an employee cannot log into WebSS?**
   - a) Update the browser to the latest version
   - b) Check the employee's access permissions
   - c) Disable all notifications
   - d) Reset the employee's password

3. SayPro Sage 300 People Personnel Management

Objectives:

- Understand the core features of Sage 300 People's Personnel Management module.
- Learn how to manage employee data and employment history.
- Understand how to handle employee contracts and benefits.
- Gain proficiency in managing employee performance, terminations, and reporting.

Topics Covered:

1. **Employee Data Management**

- **Creating Employee Profiles**
  - How to add a new employee into the system (personal information, position, department, salary details, etc.).
  - Managing employee records, including contact details, job titles, and work history.
  - Managing employee demographic data (address, emergency contacts, marital status, etc.).
- **Updating Employee Information**
  - How to edit and update employee records as needed (e.g., change of address, marital status, job titles).
  - Managing updates to employee skills, qualifications, and certifications.
- **Employee Document Management**

- Uploading and storing employee-related documents such as contracts, qualifications, and performance reviews.

Employment History and Records

- **Managing Employment Records**
  - Recording key dates such as hire date, probation period, and retirement age.
  - Documenting employee performance reviews, disciplinary actions, and promotions.
  - Tracking career progression and documenting internal transfers or promotions.
- **Tracking Employment Contracts**
  - Understanding different types of contracts: permanent, temporary, freelance, etc.
  - Configuring contract start and end dates, renewal dates, and terms.
  - Managing fixed-term contracts and auto-renewals.

Position and Job Management

- **Creating and Managing Job Positions**
  - Defining job roles and their corresponding job descriptions.
  - Managing job grades, salary bands, and reporting lines.
  - Adding positions within departments and ensuring they align with organizational structure.
- **Managing Position Changes**
  - Documenting position changes within the company, including promotions, demotions, and lateral moves.
  - Updating employees' new positions, responsibilities, and salaries.

Contract Management

- **Setting Up Employee Contracts**

- How to create, manage, and track employment contracts using Sage 300 People.
- Managing contract end dates, renewals, and amendments.
- Monitoring compliance with contract terms and regulations.

- **Contract Types**
  - Distinguishing between different contract types (permanent, temporary, part-time, etc.).
  - Managing contract extensions and handling contract terminations.

Employee Benefits Administration

- **Configuring Benefits Packages**
  - Setting up employee benefits options (health insurance, pension plans, allowances, etc.).
  - Managing benefits deductions and tax implications.
  - Enabling benefits enrollment and updating benefits elections.
- **Managing Employee Entitlements**
  - Tracking and updating employee entitlements, such as sick leave, vacation days, and maternity/paternity leave.
  - Setting up accrual rates and leave policies (paid, unpaid, carryover).
- **Integrating with Payroll**
  - Ensuring employee benefits data is correctly integrated with payroll for accurate deductions.
  - Managing benefits processing and adjustments (e.g., deductions for medical aid or pension).

Managing Terminations and Exits

- **Termination Process**
  - Handling the formal process of employee termination, including resignation, retirement, or dismissal.

- Completing exit interviews and documenting reasons for termination.

- **Final Payments and Severance**
  - Managing final payments (salary, leave days, severance pay, etc.).
  - Ensuring compliance with local labor laws regarding final settlements.
- **Archiving Employee Records**
  - Storing employee records post-termination for compliance and future reference.
  - Archiving employee data securely for future access (e.g., tax audits or legal requirements).

Reports and Analytics for Personnel Management

- **Generating Employee Reports**
  - Running reports on employee status, position changes, terminations, and promotions.
  - Customizing employee reports based on various criteria (department, position, contract type).
- **Tracking Personnel Metrics**
  - Analyzing turnover rates, employee retention, and employee growth trends.
  - Reporting on employee diversity, promotions, and hiring statistics.

Practical Exercises:

1. **Creating and Managing Employee Profiles**
   - Add a new employee into the system, ensuring all required data (personal details, position, salary, etc.) is captured.
   - Update an employee’s personal details and job title.
2. **Managing Position Changes**

- Simulate a promotion for an employee, updating their position and salary details.
- Record a lateral move or internal transfer and ensure the changes are reflected in the employee's record.

3. **Managing Employee Benefits**
    - Set up a benefits package for an employee, ensuring it includes health insurance, pension, and leave entitlements.
    - Update the employee's leave balance and ensure it's reflected in payroll.
4. **Terminating an Employee**
    - Process a resignation or retirement, ensuring that the correct final payments and severance are calculated.
    - Archive the terminated employee's records for future reference.
5. **Running Personnel Reports**
    - Generate a report on all employees in a specific department, showing their position and leave balances.
    - Run a turnover report for a specific time period and analyze the findings.

Assignment:

- **Case Study on Employee Benefits Management**
  📌 Write a case study on how proper management of employee benefits in Sage 300 People can improve employee retention and satisfaction. Include examples of benefit types that can be tracked and managed in the system.

Quiz:

1. **What type of information is included in an employee profile?**
    - a) Personal contact details
    - b) Job title and position history
    - c) Employment contract information

- d) All of the above

2. **Which of the following would you typically use Sage 300 People to manage?**
    - a) Employee contracts and promotions
    - b) Employee health and safety regulations
    - c) Recruitment and onboarding
    - d) All of the above
3. **How do you manage an employee's benefits in Sage 300 People?**
    - a) Through the Employee Benefits module
    - b) Using the Payroll module
    - c) Through the Leave Management module
    - d) Both a and b

4. Sage 300 People Performance Management

Objectives:

- Understand the Performance Management module in Sage 300 People.
- Learn how to configure performance management settings for employees and teams.
- Gain proficiency in managing performance reviews, setting goals, and tracking employee progress.
- Develop the ability to analyze performance data and generate relevant reports.

Topics Covered:

Introduction to Performance Management

- **What is Performance Management?**
  Performance management is a continuous process of identifying, measuring, and developing employee performance to align individual performance with organizational goals.
- **Key Features of Sage 300 People Performance Management**
  - Employee goal setting and tracking
  - Performance appraisals and reviews
  - Feedback and continuous development
  - Career progression tracking
  - Integration with other modules (payroll, leave, and employee data)

Setting Up Performance Management in Sage 300 People

- **Configuring Performance Review Templates**

- How to create custom performance review templates based on the company's needs.
- Setting review periods (quarterly, bi-annually, or annually).
- Defining the review process (self-assessment, manager assessment, peer reviews).

- **Performance Categories and Scales**
  - Defining the performance categories (e.g., leadership, teamwork, technical skills, communication).
  - Setting up performance rating scales (e.g., 1-5, "Exceeds Expectations" to "Needs Improvement").
  - Aligning performance categories with organizational goals.

Setting Employee Goals and KPIs

- **Goal Setting and Alignment**
  - Setting SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) for employees.
  - Aligning employee goals with department and organizational objectives.
  - Managing goal tracking and setting milestones to monitor progress.
- **Key Performance Indicators (KPIs)**
  - Defining KPIs that measure performance against organizational goals.
  - Setting KPIs for specific job roles (e.g., sales targets, project deadlines, quality of work).
  - Tracking and reviewing KPIs during performance assessments.

Conducting Performance Reviews

- **The Review Process**
  - Conducting performance reviews at regular intervals (e.g., quarterly or annually).

- How managers can provide constructive feedback to employees.
- Setting up a self-assessment process for employees to evaluate their own performance.
- Handling performance discussions and setting new objectives based on the review.

- **Feedback Mechanisms**
  - Providing continuous feedback, both formal and informal.
  - The importance of 360-degree feedback (peer reviews, manager feedback, etc.).
  - How to address performance gaps and create action plans for improvement.

Tracking Performance and Employee Progress

- **Monitoring Ongoing Performance**
  - Using dashboards and reports to monitor employee progress toward goals and KPIs.
  - Identifying high performers and areas where additional support or development is needed.
- **Managing Employee Development**
  - Setting up individual development plans (IDPs) for employees.
  - Creating training and development opportunities based on performance reviews.
  - Aligning development goals with the company's skill gap and career progression plans.
- **Addressing Performance Issues**
  - Identifying performance issues early through regular check-ins and progress tracking.
  - Handling underperformance and putting corrective actions in place.
  - Developing improvement plans and monitoring progress.

Reporting and Analytics for Performance Management

- **Generating Performance Reports**
  - How to generate performance reports that provide insights into employee performance trends and progress.
  - Customizing reports to focus on specific performance metrics (e.g., overall ratings, goal achievement).
  - Analyzing employee performance across departments or teams.
- **Tracking Employee Engagement**
  - Analyzing performance data to gauge employee engagement and satisfaction.
  - Using performance insights to inform employee retention strategies.
- **Performance Trends and Organizational Goals**
  - Understanding how individual performance contributes to broader organizational success.
  - Identifying trends and gaps in performance that need attention.

2. **Integrating Performance Management with Other Modules**
   - **Linking Performance to Compensation and Rewards**
     - How performance reviews can influence salary increases, bonuses, and promotions.
     - Setting up merit-based compensation linked to performance outcomes.
   - **Integration with Learning and Development (L&D)**
     - Aligning performance outcomes with learning and development goals.
     - Using performance data to inform the creation of training programs.

Practical Exercises:

1. **Configuring Performance Review Template**

- Create a custom performance review template based on performance categories and rating scales that reflect the company's goals.
- Define review periods and set the review process for both employees and managers.

2. **Setting Employee Goals and KPIs**
   - Set SMART goals for an employee, aligning them with organizational objectives.
   - Define appropriate KPIs for different roles (e.g., sales, customer service).
3. **Conducting a Performance Review**
   - Simulate a performance review process: input a self-assessment, manager feedback, and set new objectives for the employee.
4. **Tracking Employee Progress**
   - Monitor an employee's progress towards their goals using Sage 300 People's dashboards.
   - Generate a report to visualize progress and provide insights on performance metrics.
5. **Handling Performance Issues**
   - Identify a performance issue from a hypothetical employee's review and implement an improvement plan.

Assignment:

- **Case Study on Performance Reviews and Employee Development**
  📌 Write a case study on how an organization can leverage Sage 300 People's performance management tools to drive employee development and engagement. Discuss the role of regular feedback, goal setting, and KPIs in improving performance.

Quiz:

1. **What does SMART stand for in goal setting?**

- a) Special, Measurable, Achievable, Realistic, Timed
- b) Specific, Measurable, Achievable, Relevant, Time-bound
- c) Secure, Marketable, Achievable, Realistic, Targeted
- d) Simple, Measurable, Adjustable, Realistic, Timebound

2. **Which of the following is an example of a performance category in Sage 300 People?**
    - a) technical skills
    - b) Job title
    - c) Departmental objectives
    - d) All of the above
3. **How can performance reviews influence compensation in Sage 300 People?**
    - a) They determine the employee's eligibility for training programs
    - b) They can influence salary increases, bonuses, and promotions based on performance outcomes
    - c) They provide a record of personal achievements
    - d) None of the above
4. **What is the purpose of 360-degree feedback in performance management?**
    - a) To gather feedback only from the employee's direct manager
    - b) To collect feedback from multiple sources, including peers, subordinates, and the employee themselves
    - c) To evaluate employee performance based solely on self-assessment
    - d) To focus on employee goals without feedback