

Signify Modules Training and Workshop Guidelines

	Training	Configuration Workshop	Optional Additional Workshops / Advanced Training
Purpose of the session	<ul style="list-style-type: none"> • Training on the use of the system assuming that the prerequisites are met. • This does not include HR Consultation, detailed business process discussions or system configuration requests. 	<ul style="list-style-type: none"> • These workshops will allow you to have discussions with a Signify consultant regarding alignment of company-specific business processes to standard system functionality. • Alternative system configuration options can be considered and implemented where possible. 	<ul style="list-style-type: none"> • A Signify consultant can support you during the implementation process to assist with: <ul style="list-style-type: none"> ○ Data preparation ○ Client-specific data loading and structuring • In-depth training on advanced features that were not covered during the initial training. • These workshops are usually combined with a “hand-holding” phase before and after go-live.
Job Profiling Module	<ul style="list-style-type: none"> • 1 Day • Prerequisite: Basic under • Job profiler theory • Creating and populating a job profile • Adding positions to job profiles • Drawing profile and position reports • Impact on other modules 	<ul style="list-style-type: none"> • Typically 1 Day • The employee data import template guidelines • Change Master Data • Profile administration • Report customisation (if any) • Influence on other modules (org structure, R&S, PM, Manage Employees etc.) 	
Organisation Structure	<ul style="list-style-type: none"> • 1 Day • Adding, removing and moving organisation nodes/levels • Linking positions to organisation nodes • Adding additional information to an org node • Organisation structure based reporting and filtering • Sub groups • Impact on other modules 	<ul style="list-style-type: none"> • Typically 1 Day • Understanding a physical org structure vs. a manager reporting hierarchy • Elements of an org structure • The org structure in the employee data import template • System generated subgroups based on the org structure 	

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Recruitment & Selection	<ul style="list-style-type: none"> • 1 Day • Process overview • Advertising positions (vacant or not); • Setting an advertisement's publication audience; • Receiving and managing applications; • Sending letters to applicants; • Appointing candidates • Reporting • Integration with other modules 	<ul style="list-style-type: none"> • Typically 1 Day • Change Master data • Email template customisation • Ad hoc vacancy advertisement emails • Setting a target audience 	
Employee Management	<ul style="list-style-type: none"> • 1 -2 Days • Understand the standard employee-related processes: Appointment, Transfer and Termination. • Understand the module layout, menu structure, most important information types and the module's place in the overall system. • Roles (Administrator, Manager) • Creation and management of users and their access rights • Reporting lines • Reports • Use of subgroups 	<ul style="list-style-type: none"> • Typically 1 Day • Potential sources of data • Module settings and configuration • Populate master data tables • The employee data import template • Configure "Additional Information" fields if needed 	<ul style="list-style-type: none"> • Typically 1 Day • Discuss all employee related information screens and reports • Building ad hoc subgroups
Employee Self Service (HR Processes and Update own info)	<ul style="list-style-type: none"> • < 1 Day • Login and landing page • Access to HR Processes • Update personal information • Reacting on system notifications 	<ul style="list-style-type: none"> • Typically 1 Day • Configuration settings • Email notification customisation • Linking employees to processes • Audit Reports • Portal configuration 	

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Leave Module	<ul style="list-style-type: none"> • 1 Day • Leave principles • Confirm terminology • Roles • Leave engine functioning • Booking leave • Approving leave • Leave administration 	<ul style="list-style-type: none"> • Typically 2 - 3 Days • Understand the Signify Leave module and leave parameters (including roles of employees, managers and administrators) • Understand and determine leave groups • Understand and determine leave types • Understand and determine leave settings per leave type per leave group • Compile a company leave configuration document • Configure the Leave module • Leave reports • Customise leave email notifications • Case studies 	
Dashboards			<ul style="list-style-type: none"> • Create additional dashboards as per client request
Performance Management	<ul style="list-style-type: none"> • 1 Day • The PM process • PM roles (Employee, manager, administrator) • PM module navigation • How an employee would use the PM module • How a manager would use the PM module 	<ul style="list-style-type: none"> • Typically 1 Day • Performance management manager reporting lines • Module and screen settings • Purpose of screens • Full process discussion • Configure PM email notifications • PM contract administration • Creation of PM contract templates • Case studies 	
Personal Development Plan (PDP or IDP)	<ul style="list-style-type: none"> • ½ Day • PDP screens • The PDP process • Integration with Training Scheduling module • Learner records • Roles (Employee and Manager) 	<ul style="list-style-type: none"> • Typically ½ Day • Module configuration 	
e-Learning	<ul style="list-style-type: none"> • 1 Day • The user's experience • What is a pathway? • Pathway vs. course • The pathway tree structure: guidelines • The administrator's design tool • Pathway elements (Basic) • Publishing a pathway • Setting a target audience • Administrating a user's pathway 	<ul style="list-style-type: none"> • Typically 1 Day • Module configuration • Build a pathway tree structure • Pathway vs. course : case studies • Configure pathway email notification • Learning Guides module 	<ul style="list-style-type: none"> • Typically 1 Day • Configuring a basic pathway tree structure • Building a full, live pathway and publishing it to a target audience • Pathway elements (advanced) • Administrating a user's pathway • Learner records • Integration of a pathway and an event • Loading and publishing documents in the learning guides module

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Training Scheduling Module	<ul style="list-style-type: none"> • 1-2 Days • Process overview • Confirm terminology • Role overview (employee, manager, coordinator/administrator, facilitator) • The user's experience • Creating and scheduling new events • Booking attendees • Printing and completing attendance registers • Updating attendee learner records • Advanced features (basics) • Reporting 	<ul style="list-style-type: none"> • Typically 1 Day • Module configuration • Role access levels • Change Master Data • Email notification configuration, signoff and activation 	<ul style="list-style-type: none"> • Typically 2 - 3 Days • Module configuration • Role access levels • Change Master Data • Email notification configuration, signoff and activation • Process confirmation for company • Loading training interventions • Default event template • Module streamlining and optimisation • Advanced functionalities per role • Combining courses into programmes • Learner records • Building course evaluations • Configuring ad hoc event notifications • Working with campuses • Loading training interventions (detailed) • Working with course and attendee costs • Reporting
Salary Review Process			TBD
Job Levelling			TBD
FAIS Module (SA Only)	<ul style="list-style-type: none"> • ½ Day • Requires an understanding of FAIS in terms of Licenses, Product categories and Fit and Proper requirements • Linking of Reps, KIs and Supervisors to Licenses • Defining roles and categories within each license 		TBD – If specific rules need to be setup to automatically populate the FAIS registers based on certain criteria, this process will be implemented on a times and material basis, but typically range between 3 and 5 days.