



**Training
Courses**

**SfP
World
Service**



SfP World Service

**World Service Training
Courses**

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World Service Training Courses

INTRODUCTION

There are a number of standard courses available from Software for People (SfP).

Training system or your system

If your system has been extensively configured, or if you simply want to see your data (which delegates will understand instantly), it may be necessary to use a copy of your system (not the 'live' version) for the training course.

Dedicated or scheduled course

In the above case, or if you have 4 or 5 delegates for a single course, you will want to book a 'dedicated' course for your organisation. Alternatively, if you have a fairly standard system and only have 1 or 2 delegates for a particular course, you can book places on our scheduled training.

Class-room or on-site

All courses can be delivered either at our classroom facilities in Hitchin or at a client's site. If you wish a course to be at your own site, we reserve the right to specify the facilities to be supplied by you – e.g. one PC per delegate plus one for the trainer, all with access to separate copies of the database, in a dedicated room (not open-plan office).

Other facilities/options

We can also arrange bespoke courses – either if your system is itself virtually bespoke or if you have non-standard requirements (such as combining elements of different courses for a particular group of delegates). Please talk to us if you want something that you do not see in this document.

Booking procedure

When a booking has been agreed verbally, a Booking Form will be sent to you that needs to be signed and returned to us before the booking is deemed to be confirmed. You can also indicate any 'special dietary' requirements for delegates on this form.

Payment and cancellations

Once confirmed, you will be invoiced and payment is expected in advance of the course. We reserve the right to charge in full if a cancellation is not made in writing at least 10 days before the date of the course.

Course Guarantee

We offer a guarantee with all of our courses – if you are either not satisfied with the training or as an individual the training is not fully understood you can arrange to attend a scheduled, equivalent course held at our offices, within 3 months.



Training Courses

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The standard training courses for World Service are:

- [1. Managing Personnel within World Service](#)
- [2. Managing Payroll within World Service](#)
- [3. Advanced Payroll within World Service](#)
- [4. Managing Absence within World Service](#)
- [5. Managing Recruitment within World Service](#)
- [6. Report Writing within World Service](#)
- [7. Advanced Reporting within World Service](#)
- [8. Managing and Administering World Service](#)
- [9. Configuring and Developing World Service](#)
- [10. Management Appreciation of World Service](#)
- [11. Managing Training and Development Records within World Service](#)

For further information, please contact Client Services on 01462 44 18 44.



Training Courses

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1. Managing Personnel within World Service

This is the course recommended for all new Personnel users of World Service, unless their role is sufficiently specialist to make one of the other courses more relevant.

Pre-Requisites:

Delegates on this course should be PC literate and familiar with Windows operating systems. Delegates should also be familiar with their own Company structure.

Course Content:

- Navigating the World Service standard system.
 - Posts and Vacancies
 - Employees and Applicants
- Understanding the World Service database structure.
- Maintaining organisation data within World Service.
 - Organisation units and relationships
 - Post relationships (FTEs, Grades, etc)
- Maintaining employee data within World Service.
 - Employment and contracts
 - Salaries and allowances
- Understanding the relationships between data items.
- Running pre-defined (standard or developed) reports.
- Using World Service and Word to create mail-merge letters.

Course Objectives:

On completion of this course delegates should be able to find their way confidently around the core Personnel areas of World Service.

They should be able to understand the logical connection between applicants and/or employees and the organisation, including the difference between establishment and complement.

Delegates should be comfortable in managing joiners/leavers, particularly in terms of the impact on employment, contract and salary records.

Duration 1 Day



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2. Managing Payroll within World Service

This course is designed for delegates who spend most or all of their time within the Payroll function – managing all aspects of the build-to-gross and net pay processes.

Pre-Requisites:

Delegates should have a detailed understanding of all their own Company's payroll procedures. If they have no experience previously of using World Service, the course may be extended to a second day – so as to understand the integration of personnel.

Course Content:

- An introduction to Payroll, how to log in and out, negotiating the menus, new starters and leavers, changes to employee records and entering hours worked
- Creating Pay Years, Pay Periods, Pay Codes
- Understand how the data is accumulated into Pay Values
- Understand the different Pay Values
- How to Roll Up the payroll data
- How to extract the payroll data
- Create, P45's, P60's, Court Orders, Payment & Deduction types, Tax Credits, loans, overrides and all other process.
- Set-up and create Pension Schemes, Members, and contributions.
- Carry out Pre and Post payroll checks

Course Objectives:

On completion of this course delegates should have the confidence to complete all pre-processing activities (data-entry and checks) – and to process a payroll.

They should be able to review reconciliations and anomalies, and understand how to make adjustments prior to committing the period being processed.

Delegates should also be able to generate payslips, BACS files and/or cheque/cash listings – and any other special analyses that have been set-up for their organisation.

Duration 1 Day



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3. Advanced Payroll within World Service

This course is designed for delegates who are responsible for managing the Payroll function – or who work in Finance and need information from the Payroll function.

Pre-Requisites:

Delegates should have a clear understanding of how their Company's payroll data can be used, beyond the need to simply process it. They should also have some previous experience of Reporting within World Service.

Course Content:

[This course is currently being re-designed and is not scheduled].

- Tracking changes in costs by pay elements, by cost centres, by employees.
- Creating budgets and identifying variances in costs and hours.
- Incorporating expense claims and authorisation within payroll.
- Paying self-employed (non-PAYE) contractors via the payroll.
- Recording benefits for generation of P11(D) returns.
- Reviewing the cost-effectiveness of each benefit type.
- Generating journals for finance, rather than just reports.
- *Other topics under consideration ...*

Course Objectives:

On completion of this course delegates should have a better understanding of how their payroll data can be used for more than PAYE management.

They should be able to analyse this data in a number of new ways.

Delegates should also be able to consider new ways in which their payroll can be extended to incorporate other related processes – and how to get best value from their World Service Payroll.

Duration 1 Day



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4. Managing Absence within World Service

This course provides in-depth training for delegates who spend a lot of their time recording and managing Absences from work. It is designed to improve users' ability to manage the data and produce statistics on Absence.

Pre-Requisites:

Delegates should have an understanding of their own Company's absence reporting policies and procedures. They should already have previously attended the Managing Personnel with World Service training course – and should have some experience of creating Reports within World Service.

Course Content:

- How Absence spells relate to Working patterns.
- Setting-up and assigning working-patterns.
- Setting-up absence calendar parameters.
- Individual and group calendars.
- Recording different types of (and reasons for) absence.
- The difference between spells and days 'lost'.
- Merging/splitting contiguous absence spells.
- Calculating running totals (monthly, quarterly, etc).
- Producing statistical reports – by type, department, duration, etc.

Course Objectives:

On completion of this course delegates should be able to confidently manage all aspects of recording Absences (holiday, sickness, etc) within World Service.

They should be able to set-up different types of absence – and understand the use of the absence calendar for data-entry as well as viewing data.

Delegates should also be able to produce reports with statistical data identifying areas requiring further investigation or analysis.

Duration 1 Day



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5. Managing Recruitment within World Service

This course provides in-depth training for delegates who spend most of their time within the Recruitment function and may be responsible for supervising that function.

Pre-Requisites:

Delegates should have an understanding of their own Company's recruitment policies and procedures. They should already have some experience of using World Service – and should preferably have previously attended the Managing Personnel with World Service training course.

Course Content:

- An overview of all the Recruitment records and their relationships.
- Creating a series of Letter records.
- Defining and setting-up Progress Stages.
- Creating Vacancy and Applicant records.
- Assigning each Application to a Vacancy.
- Managing the progress of each application through the relevant Stages.
- Generating data-source files for Letters at each Stage.
- Printing letters and/or labels 'en masse'.
- Analysing the results of recruitment campaigns.

Course Objectives:

On completion of this course delegates should be able to confidently manage all aspects of the recruitment function from within World Service.

They should be able to monitor the progress of an Applicant (across one or more applications) and/or the status of a Vacancy.

Delegates should also be able to produce 'automated' documentation throughout any campaign.

Duration 1 Day



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6. Report Writing within World Service

This course provides an introduction to report writing with World Service, allowing the user to build new reports.

Pre-Requisites:

Delegates on this course should have previously attended one of the Managing with World Service courses and, therefore, be familiar with the available records/fields.

Course Content:

- Introduction to simple report writing (using Quick Build™).
- Understanding the concept of embedded and non-embedded Sub-reports.
- Building conditions and joins on the records and data to be produced.
- Using a Run Parameter, so that the report prompts a user to provide variable data as part of the selection criteria when the report is run.
- Creating and inserting Calculated and Accumulated fields within a report.
- Creating Table Reports for statistical summaries.
- Managing the report output, including creating a file that can be opened in other software packages (e.g. Word or Excel).
- Creating a Letter record to manage the relationship between a template and a data file generated by World Service.

Course Objectives:

On completion of this course delegates should be able to confidently create and manage the day-to-day reporting requirements of the Human Resource function.

They should be able to produce mail-merged letters automatically, for printing either for a single record or for a large numbers of records (e.g. letters for Pay awards, Job acceptance and Rejection letters).

Delegates should also be able to produce statistical information reports.

Duration 1 Day



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7. Advanced Reporting within World Service

This course is designed for more experienced World Service users. It recaps some of the basic topics in the Report Writing course, but also includes more advanced topics.

Pre-Requisites:

Delegates should preferably have previously attended the Report Writing with World Service training course – and must already have some experience of building reports within World Service. They should also have a reasonable understanding of Excel.

Course Content:

- Review of core concepts from Report Writing with World Service.
- Using Next Action commands to populate Active and Selectable Listers.
- Using Next Action commands to export data direct to Word or to Excel.
- Formatting and importing data from external files into World Service.
- Using the Graphical Output package within World Service.
- Using World Service functions as 'macros' within conditions.
- Setting-up and using Quick Search™ [NOTE: this requires knowledge of SQL].

Course Objectives:

On completion of this course delegates should be able to design and build the more advanced reports typically required for 'management reporting'.

They should be able to set-up processes that can be run by day-to-day users – e.g. as part of a pay award procedure, or as pre-processing payroll checks.

Delegates should also be able to apply some advanced functions.

Duration 1 Day



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8. Managing and Administering World Service

This course is for people responsible for managing a World Service system, not using it.

Pre-Requisites:

Delegates should have a basic familiarity with SQL Server and database concepts.

Course Content:

- System Parameter options and over-riding these for a Workstation.
- Understanding World Service database records, fields and sets.
- Creating database sub-sets (filters). [*NOTE: this requires knowledge of SQL*].
- Exporting and Importing data
 - Mass Updating records via conditions on existing data.
 - Creating multiple records with data from external sources.
- Audit logging (SQL statements and database services).
- User Access Controls
 - Creating User Groups and Users.
 - Managing Passwords and 'lock-outs'.
 - Creating and editing Menus.
 - Allocating 'start-up' Toolbars.
 - Applying record restrictions.
- Understanding Messages - screen-based and system-level.
- Defining and creating database Virtual Fields (embedded calculations).
- Data-entry Controls - Auto-generation values and Look-up tables/values.
- Overview of SQL Enterprise Manager (backup/restore, table views, security).

Course Objectives:

On completion of this course delegates should be able to manage a secure World Service system, whilst providing at least a 1st-level technical support service.

They should be able to make reasonable changes to key aspects of its operation (but not the database structure or central applications).

Delegates should also be able to understand how World Service uses SQL Server.

Duration 1 Day



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9. Configuring and Developing World Service

This course is designed for advanced World Service users and System designers who want to be able to customise and configure their system to meet changed needs.

Pre-Requisites:

Delegates should have experience of analysing user needs and designing database systems. They should also have some experience of using World Service.

Course Content:

- Screen Definition Files (SDF) or screens
 - Screen parameters
 - Field parameters
 - View 32 path definitions
- World Service field formats – definition and usage
- Editing existing screens (without changing the database)
 - Field-level validation
 - Post-field actions
 - Record-level validation
- Adding, Re-formatting and Deleting fields
- Applying the ONx options to control processing
- Different ways to link Records (Keys, Pkeys, Link fields)
- Creating new Records (screens, data dictionary and database)
- Using Action-buttons (short-cuts and wizards)
- User Messages – warnings vs. mandatory

Course Objectives:

On completion of this course delegates should be able to make changes to an existing World Service system, whilst understanding the impact on current operations.

They should be able to build and apply small, additional applications as part of a single integrated system – and, after testing, release it to selected users.

Delegates should also be able to discuss more complex requirements with SfP.

Duration 2 Days



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10. Management Appreciation of World Service

This course has been designed for Managers and Directors, who wish to understand and appreciate how World Service works and what it is capable of achieving.

Pre-Requisites:

None – although delegates should have some understanding of the objectives that they wish their Personnel and Payroll functions to deliver for the organisation.

Course Content:

- Navigating the standard World Service system.
 - Jobs
 - Applicants
 - Vacancies
 - Employees
- Running pre-defined reports.
- Creating simple reports.
- Running Calculated reports.
- Running Table reports.
- Outputting letters for Salaries.
- Production of statistics on Absence and Salaries.

Course Objectives:

On completion of this course delegates should have a broad appreciation of the scope of the World Services system and be able to make a reasonable assessment of the demands that can be placed on it.

They should be able to extract some useful information from it – and understand what other information can be delivered through their departments.

Delegates will also have the opportunity to discuss future requirements with SfP.

Duration 1 Day



Training Courses

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11. Managing Training and Development Records within World Service

This is the course recommended for all new Training and Development users of World Service.

Pre-Requisites:

Delegates on this course should be PC literate and familiar with Windows operating systems. Delegates should also be familiar with their own Company structure.

Course Content:

- Navigating the World Service standard system.
 - Employees and Associated Records
- Understanding the World Service database structure.
- Maintaining Training & Development data within World Service.
 - Initiatives & Budgets
 - T&D Organisation – Activities
 - Events and Bookings
- Maintaining employee Training Records.
- Workflow process of course bookings and management
- Understanding the relationships between data items.
- Obtaining Statistics
- Running pre-defined (standard or developed) reports/letters/documents.
- Brief introduction to using World Service and Word-processing to create mail-merge letters.

Course Objectives:

On completion of this course delegates should be able to find their way confidently around the core Training and Development areas of World Service.

They should be able to understand the logical connection between employees and the courses.

Delegates should be comfortable in managing creating new Budgets/Initiatives and managing course bookings.

Should be able to run standard reports and letters.

Duration 1 Day