



MAKING
WORK
EASY

WORKFORCE TRAINING AND EDUCATION COURSE CATALOG

WorkForce Training and Education
and WorkForce Training and
Education On Demand



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The key to using any software is proper training. First-class training, coupled with a commitment to the implementation, makes the transition to the new system easier. WorkForce Training and Education training courses contain the information needed to quickly and efficiently deploy WorkForce.

WorkForce Training and Education

Learning In Person or On Demand

The key to using any software system successfully is proper training. First-class training makes the transition to the new system easier.

WorkForce Software offers instructor-led training courses at the customer's location or at the WorkForce Software corporate headquarters (public training), and flexible eLearning education when needed via WorkForce Training and Education On Demand. We focus on equipping attendees with the knowledge and skills they need to maximize the power of the WorkForce solution.

Training Options

WorkForce Training and Education Instructor-Led Private Courses

WorkForce Training and Education instructor-led courses are delivered to the customer team using a train-the-trainer approach. These courses are delivered at the customer's location during the WorkForce system implementation. Instructor-led courses combine lecture, product demonstration, and hands-on activity. Training materials for each class are provided in a pdf file format.

WorkForce Training and Education Instructor-Led Public Courses

WorkForce Training and Education instructor-led public courses are delivered at WorkForce Software corporate headquarters in Livonia, Michigan. These courses are open to multiple customers based on seat availability. Public courses combine lecture, product demonstration, and hands-on activity, and allow attendees to collaborate and share insights with other WorkForce Software customers in attendance. Training materials for each class are provided.

To view the WorkForce Training and Education public courses calendar, visit the WorkForce Software Web site at www.workforcesoftware.com/services/customer-education.

WorkForce Training and Education On Demand

WorkForce Training and Education On Demand includes access to the WorkForce Software Learning Management System and library of eLearning courses developed to educate our customers, partners, and employees on WorkForce.

Access to WorkForce Training and Education On Demand is offered as a subscription service to key administrators and/or trainers in the customer's organization.

How to Contact Us

- WorkForce Software Web site
www.workforcesoftware.com/services/customer-education/
- Email inquiries to training@workforcesoftware.com
- Contact your WorkForce Software Account Manager

WorkForce Training and Education Curriculums

WorkForce Training and Education instructor-led and On Demand courses are grouped into categories, making it easy to focus on specific learning needs. Details regarding each of the individual courses is available in the course descriptions section of this catalog.

Implementation Training Curriculum – Instructor-Led

WorkForce Training and Education instructor-led courses educate employees, managers, timekeepers, payroll personnel and administrators on WorkForce. These courses are delivered during the WorkForce implementation to the project team, trainers, and administrators.

Workforce Management

Course Number	Course Name	Delivery	Training Units per Class
TST01	Testing Preparations	Instructor-led – virtual	10
TST02.1	Testing Kick-Off (1 day)	Instructor-led	30
TST02.2	Testing Kick-Off (2 day)	Instructor-led	60

Time & Attendance

Course Number	Course Name	Delivery	Training Units per Class
TMA00	Core Functionality	Instructor led	50
TMA01	Employee Functions	Instructor-led	25
TMA02	Manager Functions	Instructor-led	25
TMA03	Administrator Functions	Instructor-led	35

Data Collection Terminals

Course Number	Course Name	Delivery	Training Units per Class
DCT01	Data Collection Terminal Deployment	Instructor-led – virtual	10
DCT02	Data Collection Terminal Management	Instructor-led – virtual	10

Absence Compliance Tracker

Course Number	Course Name	Delivery	Training Units per Class
ACT00	Core Concepts	Instructor-led – virtual	15
ACT01	Employee and Case Manager Functions	Instructor-led	25
ACT02	Administrator Functions	Instructor-led	20

Advanced Scheduler

Course Number	Course Name	Delivery	Training Units per Class
ASC00	Core Concepts	Instructor-led – virtual	15
ASC01	Scheduler Functions	Instructor-led	25
ASC02	Administrator Functions	Instructor-led	30

Fatigue Management – General

Course Number	Course Name	Delivery	Training Units per Class
FTM00	Core Concepts	Instructor-led – virtual	30
FTM01	Employee Functions	Instructor-led	25
FTM02	Manager Functions	Instructor-led	25
FTM03	Administrator Functions	Instructor-led	35

Fatigue Management – Nuclear

Course Number	Course Name	Delivery	Training Units per Class
FMNIP01	Administrator Functions and Best Practices	Instructor-led	35
FMNIP02	Foundational Concepts	Instructor-led	45

Implementation Training Curriculum – On Demand

WorkForce Training and Education On Demand courses educate employees, managers, timekeepers, payroll personnel and administrators on WorkForce. These courses are delivered during the WorkForce implementation to the project team, trainers, and administrators. On Demand subscription courses can be completed as needed during the implementation and/or once WorkForce is deployed.

Time & Attendance

Course Number	Course Name	Delivery	Training Units per Class
TA100	Core Concepts	On Demand subscription	n/a
TA120	User Acceptance Testing	On Demand subscription	n/a
TA150	Employee Essentials	On Demand subscription	n/a
TA250	Manager Essentials	On Demand subscription	n/a
TA300	Period End Essentials	On Demand subscription	n/a
TA350	Administrator Essentials	On Demand subscription	n/a
TA171	WebClock Time Entry Basics	On Demand subscription	n/a
TA177	WorkForce 4000 Time Entry Basics	On Demand subscription	n/a

Data Collection Terminals

Course Number	Course Name	Delivery	Training Units per Class
CL101	Introduction to Data Collection Terminals	On Demand subscription	n/a
CL201	Deploying Data Collection Terminals	On Demand subscription	n/a
CL301	Managing Data Collection Terminals	On Demand subscription	n/a
CL401	Advanced Troubleshooting for Data Collection Terminals	On Demand subscription	n/a

Absence Compliance Tracker

Course Number	Course Name	Delivery	Training Units per Class
AC100	Core Concepts	On Demand subscription	n/a
AC120	User Acceptance Testing	On Demand subscription	n/a
AC150	Employee Essentials	On Demand subscription	n/a
AC250	Case Manager Essentials	On Demand subscription	n/a
AC350	Administrator Essentials	On Demand subscription	n/a

Advanced Scheduler

Course Number	Course Name	Delivery	Training Units per Class
AS100	Core Concepts	On Demand subscription	n/a
AS120	User Acceptance Testing	On Demand subscription	n/a
AS200	Scheduler Essentials	On Demand subscription	n/a
AS350	Administrator Essentials	On Demand subscription	n/a
AS100	Core Concepts	On Demand subscription	n/a

Fatigue Management – General

Course Number	Course Name	Delivery	Training Units per Class
FTM00	Core Concepts	Instructor-led – virtual	30
FTM01	Employee Functions	Instructor-led	25
FTM02	Manager Functions	Instructor-led	25
FTM03	Administrator Functions	Instructor-led	35

Fatigue Management – Nuclear

Course Number	Course Name	Delivery	Training Units per Class
FMNIP01	Administrator Functions and Best Practices	Instructor-led	35
FMNIP02	Foundational Concepts	Instructor-led	45

Customer Certification Curriculum

For users who want to take a deeper dive into WorkForce, we offer configuration, reporting, analytics, and database schema courses. These courses are geared towards administrators and/or technical users of the systems, report writers, and those customers interested in maintaining or self-implementing the WorkForce solution.

Analytics

Course Number	Course Name	Delivery	Training Units per Class
ANL01	Ad Hoc Reporting	Instructor-led	15

Public Courses – Per Seat

Course Number	Course Name	Delivery	Training Units per Class
CT-101	Time & Attendance Troubleshooting	Instructor-led	30
CT-102	Time & Attendance System Maintenance	Instructor-led	20
CT-103	Time & Attendance Advanced System Maintenance	Instructor-led	50
CT-104	Time & Attendance Advanced Configuration	Instructor-led	
CT-110	Forecasting & Scheduling Troubleshooting	Instructor-led	
CT-111	Forecasting & Scheduling Administration	Instructor-led	
CT-120	Database Schema & Report Writing	Instructor-led	
CT-121	Analytics Universe Customization and Ad-Hoc Reporting	Instructor-led	

Course Descriptions – Instructor-led Courses by Subject

Absence Compliance Tracker

ACT00 Core Concepts

Gain an overview of the Absence Compliance Tracker to bring staff up to speed on functional details.

Audience	Human resources and other personnel who manage your organizational leave request and compliance needs
Prerequisites	None
Duration	½ day
Class Size Limit	15
Delivery	Virtual (WebEx)

Course Content

- General terminology
- Fundamental employee management details
- User interface
- Leave requests
- Time off requests
- Viewing an absence case
- Approvals
- Administrator workflow
- Compliance issues

ACT01 Employee and Case Manager Functions

Learn to use ACT from the employee and case manager perspectives to ensure compliance with federal, state and local laws.

Audience	This is a train-the-trainer course. Company trainers and human resources or other personnel assigned to manage cases should attend.
Prerequisites	None
Duration	½ day

Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Employees entering leave requests
- Case managers entering leave requests
- Case managers reviewing cases
- Case manager workflow
- Override system-determined leave eligibility
- ACT reports

ACT02 Administrator Functions

Take a guided tour through the WorkForce workflow and other administrative tasks. This course is not necessary for customers also implementing WorkForce Time & Attendance.

ACT02 is for ACT only implementations.

Audience	Human resources, payroll, or other personnel assigned to administer the WorkForce application.
Prerequisites	ACT01
Duration	3 hours
Class Size Limit	8
Delivery	Instructor-led class

Course Content

- The WorkForce administrative customer
- Generate administrative reports
- Advance pay periods
- Import data
- Update system data
- User roles
- Schedule templates
- Maintain employee data in WorkForce
- Create new administrative users
- Emulate end user access

Advanced Scheduler

ASC00 Core Concepts

Gain an overview of the Advanced Scheduler to ramp up staff speed on functional details.

Audience	Staff responsible for managing organizational staffing needs
Prerequisites	None
Duration	½ day
Class Size Limit	15
Delivery	Virtual (WebEx)

Course Content

- Implementation process
- Schedule methodology
- Define your organization
- Components of a schedule
- Employee schedule maintenance
- Find employees for open work assignments
- Overtime equalization
- Integrate with Time & Attendance
- Security considerations

ASC01 Scheduler Functions

Learn to manage complex employee schedules with our advanced scheduling tools.

Audience	Schedulers or other personnel responsible for managing employee schedules
Prerequisites	<ul style="list-style-type: none"> • ASC00 • Good understanding of AS core concepts
Duration	½ day
Class Size Limit	8
Delivery	Instructor-led class

Course Content

- Use Auto Scheduler to staff employees intelligently

- Manage schedule changes
- Manage employee availability
- Overtime equalization

ASC02 Administrator Functions

Learn to configure various building blocks within Advanced Scheduler.

Audience	Administrators who will configure and administer Advanced Scheduler
Prerequisites	ASC01
Duration	1 day
Class Size Limit	8
Delivery	Instructor-led class

Course Content

- Configure the Auto Scheduler to staff employees intelligently
- Configure Advanced Scheduler tools to manage schedule changes
- Manage employee availability
- Configure overtime equalization

Analytics

ANL01 Ad Hoc Reporting

Learn the basics of creating and using Analytics reports through hands-on exercises.

Audience	Non-technical end users who will create WorkForce Analytics reports to view WorkForce data
Prerequisites	½ day
Duration	6
Class Size Limit	Instructor-led class
Delivery	Non-technical end users who will create WorkForce Analytics reports to view WorkForce data

Course Content

- Introduction to the WorkForce sample universe objects and filters

- Create and run queries in WorkForce
- Introduction to WorkForce Analytics

Data Collection Terminals

DCT01 Data Collection Terminal Deployment

WorkForce Software provides an overview of WorkForce terminal hardware, network communication, configuration components, and basic terminal functionality to prepare you for installing, networking, and deploying terminal equipment. We recommend taking this training as soon as possible upon receipt of your terminal hardware.

Audience	IT or other staff responsible for installing and maintaining data collection terminals (DCT) on their organization's network
Prerequisites	<ul style="list-style-type: none"> • Attend the terminal requirements gathering meeting • Receive terminal hardware
Duration	3 hours
Class Size Limit	10
Delivery	Virtual (WebEx)

Course Content

- Mount and configure DCTs
- Set up networks for DCTs, DCT controller, and WorkForce server
- Deploy DCT and DCT controller configuration files
- Add DCTs to the network
- Handle multiple time zones and Daylight Saving Time changes

DCT02 Data Collection Terminal Management

Based on your organization's needs, learn about all aspects of your company's terminal functionality, transaction process and troubleshooting. We recommend taking this training just after WorkForce employee training and just before user acceptance testing.

Audience	Staff responsible for operating and maintaining data collection terminals in your organization's network.
Prerequisites	DCT01
Duration	2 hours

Class Size Limit	10
Delivery	Virtual (WebEx)

Course Content

- DCT administrator and employee functions
- Biometric enrollment and management
- Control employee and administrator access
- Use the Web Manager application to manage the controller and DCTs
- Monitor employee data transactions
- Data flow from terminals to WorkForce
- Troubleshooting and technical support

Fatigue Management - General

FTM00 Core Concepts

Ramp up project staff on WorkForce's overall functional architecture.

Audience	Human resources, payroll, and other staff actively involved with the project execution
Prerequisites	None
Duration	½ day
Class Size Limit	15
Delivery	Virtual (WebEx)

Course Content

- Data collection devices
- Data validation
- WorkForce terminology - employee policy profiles, assignment groups
- Security considerations
- Manager to employee relationships
- Synchronize employee data import
- Policy effective dating
- End of period processing
- Data exports
- Timesheet vs. pay frequency

FTM01 Employee Functions

Learn WorkForce navigation fundamentals and employee functions related to Fatigue Management.

Audience	Company trainers, human resources, payroll, and managers responsible for managing or supervising employees who will use WorkForce
Prerequisites	None
Duration	½ day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Enter data into a timesheet
- Run reports to look at your personal timesheet data
- Address timesheet exceptions
- Use different timesheet views to your advantage
- View pay results

FTM02 Manager Functions

Become familiar with WorkForce from the manager's perspective to learn functions and workflow related to Fatigue Management.

Audience	Company trainers, human resources, payroll, and managers who will use WorkForce to administer timekeeping functions for employees in a Fatigue Management environment
Prerequisites	None, but it is helpful to have attended FTM01 Fatigue Management Employee Functions
Duration	½ day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Introduction to manager views of employee time
- View pay results for employees

- Approval workflow and employee timesheet approval
- Assign schedules and schedule cycle to employee groups or specific employees
- Use WorkForce's group time entry screen
- Use manager reports to analyze employee time
- Manage timesheet exceptions
- Delegate manager functions to another user
- Manage time-off requests

FTM03 Administrator Functions

This course guides Fatigue Management administrators through the WorkForce workflow and other day-to-day administrative tasks.

Audience	Human resources or payroll personnel responsible for WorkForce Fatigue Management administration and end of period timesheet processing tasks
Prerequisites	<ul style="list-style-type: none">• FTM01• FTM02
Duration	1 day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Introduction to the Admin Customer
- End of period processing workflow
- Run administrative reports to evaluate timesheet status
- Import or export data
- Maintain employee information
- Run tasks to update system data
- Create schedules for automated tasks
- Create schedule templates and cycles
- Understand exception types and their effects on timesheet processing

Fatigue Management – Nuclear

FMNIP01 Administrator Functions and Best Practices

In this one-day course, you will learn how to correctly enter time for fatigue management rules and learn examples of proper time tracking for problematic scenarios. You will also learn about schedule templates and cycles as well as managing schedules to comply with NRC Rule 10 CFR Part 26. Other topics you will learn include amendments and approvals, the amendment process, and Fatigue Management Nuclear reports.

Audience	Personnel who use WorkForce to manage employees who are subject to comply with NRC Rule 10 CFR Part 26 (Fitness for Duty)
Prerequisites	None
Duration	1 day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Dashboard layout
- Working with timesheets
- Editing employee time
- Group time entry
- Working with schedules
- Approving and amending timesheets
- Delegations
- Generating and scheduling reports
- Viewing and editing employee information
- Managing assignment groups
- Creating schedule templates and cycles

FMNIP02 Foundational Concepts

This course is a one-day deep dive into the NRC 10 CFR Part 26 as implemented in our Nuclear Industry Pak. You will learn details and concepts of the fatigue rules and how WorkForce evaluates the rules. You will also become familiar with the relationship between Fatigue Management codes and the NRC compliance rules outlined in Addendum A and the Averaging Specification. Finally, you will also learn how to use admin codes to override violations, conduct

‘what if’ testing in future timesheets, modify evaluation period data, and see how to create, delete, and edit waivers and fatigue assessments.

Audience	Personnel who require an understanding of fatigue rules or are responsible for maintaining rule compliance in WorkForce
Prerequisites	None
Duration	1 day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Key concepts and settings
- Day and shift definitions
- MWH 16/24, 26/48, and 72/168
- Minimum break between shifts
- B34/9
- Averaging online
- Outages and MDO-OUT
- Special cases
- Admin codes
- Fatigue assessments and waivers
- Reports
- Terminations

Time & Attendance

TMA00 WorkForce Time & Attendance Core Functionality

In preparation for a successful implementation, project staff should attend this class to get up-to-speed on WorkForce’s overall functional architecture.

Audience	Human resources, payroll, and other staff actively involved with project execution
Prerequisites	None
Duration	2 days
Class Size Limit	15

Delivery	Instructor-led class
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Course Content

- Core concepts in WorkForce Time & Attendance
- Key concepts of Time and Attendance and how WorkForce approaches them
- WorkForce terminology
- Hands-on introduction to the features of WorkForce Time & Attendance

TMA01 Employee Functions

Learn WorkForce navigation fundamentals and employee functions related to reporting time, activities, and absences in the system. Experience the WorkForce system from the employee's perspective.

Audience	Company trainers, human resources, payroll, and managers responsible for managing or supervising employees who will use WorkForce
Prerequisites	None
Duration	½ day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Enter data into a timesheet
- Request time off
- Run reports to look at your personal timesheet data
- Address timesheet exceptions
- Use different timesheet views to your advantage
- View pay results
- View time off bank balances

TMA02 Manager Functions

Become acquainted with WorkForce from the manager's perspective to learn functions and workflow related to managing employees.

Audience	Company trainers, human resources, payroll, and managers who will use WorkForce to manage other employees
Prerequisites	None, but attending TMA01 first is helpful
Duration	½ day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Introduction to manager views of employee time and balances
- View pay results for employees
- Approval workflow and employee timesheet approval
- Assign schedules and schedule cycles to employee groups or specific employees
- Use WorkForce's group time entry screen
- Manage time off requests
- Manage timesheet exceptions
- Use manager reports to analyze employee time
- Delegate manager functions to another user

TMA03 Administrator Functions

This course guides time and attendance administrators through the WorkForce workflow and other day-to-day administrative tasks.

Audience	Human resources or payroll personnel responsible for WorkForce administration
Prerequisites	<ul style="list-style-type: none"> • TMA01 • TMA02
Duration	1 day
Class Size Limit	10
Delivery	Instructor-led class

Course Content

- Introduction to the Admin Customer
- Run administrative reports to evaluate timesheet status
- Maintain employee information
- Run tasks to update system data

- Create schedules for automated tasks
- Maintain calendars for holidays and other special dates
- Create schedule templates and cycles
- Understand exception types and their effects on timesheet processing
- Maintain employee bank balances
- Create and maintain manager access to employee timesheets
- Create new administrative users
- Set and reset passwords
- Emulate employee access with the SuperUser account
- End of period processing workflow
- Perform end period processing steps
- Create, cancel, export, and close off cycle batches
- View import data logs

WorkForce Management

TST01 Testing Preparations

Gain insight into testing theory as it relates to WorkForce in order to learn how to develop effective test plans. This course is delivered early in the configuration phase of the project to give you sufficient time to develop test cases for the user acceptance testing phase of the project.

Audience	Human resources, IT, payroll, management, or other staff responsible for creating test cases
Prerequisites	None
Duration	3 hours
Class Size Limit	8
Delivery	Virtual (WebEx)

Course Content

- Introduction to basic testing concepts
- Prepare to test
- Create test cases
- Manage test execution

TST02 Testing Kickoff

This is an opportunity for live, real-time assistance at the start of the user acceptance testing phase of the project! Testers gain hands-on experience executing test cases, and identifying, logging, and communicating results back to the WorkForce implementation team. Testing Kickoff is usually delivered immediately following employee, manager, and administrator training so as to keep basic system functionality fresh in testers' minds as they step through your test cases.

Audience	Human resources, payroll, management, and other staff responsible for testing WorkForce in preparation for production deployment
Prerequisites	None
Duration	1 or 2 days depending upon configuration complexity and customer preference
Class Size Limit	15
Delivery	Instructor-led class

Course Content

- Understand the test environment
- Identify key configuration items to test
- Execute test cases to test your business requirements
- Coordinate testing
- Track test results and log issues
- Manage changes to your configuration

Course Descriptions - Public Instructor-Led Courses

CT-101 Time & Attendance Troubleshooting

This course introduces the technical concepts necessary to understand how the WorkForce Time and Attendance (WT&A) system works. Through instruction and interactive exercises, attendees will obtain an understanding of key functional and technical concepts and learn to perform initial troubleshooting and system administrative tasks.

Audience	Business analysts and application administrators responsible for their company's WorkForce Time and Attendance system.
Prerequisites	None
Duration	3 days
Class Size Limit	12
Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)

Course Content

- Overview of Time & Attendance system and relationship between system building blocks
- Understand relationship between employees and assignments
- Review key components of a timesheet and how to tie time to business rules
- How to adjust time for previous periods
- Overview of users, roles, delegations and understanding of impact to system functions
- Review of System Administration functions
- Understand flow of data between Time & Attendance to other systems and how to obtain actionable report data
- System architecture overview
- Review of key components of data collection terminals and data flow

CT-102 Time & Attendance Configuration Maintenance

This course introduces concepts necessary to make changes and complete system maintenance to a customer's current WorkForce Time & Attendance system. Through instruction and interactive exercises, attendees will learn how to make changes to pay and business rules that change on an annual basis or as a result of changes to a customer's business rules.

Audience	Business Analysts and System Administrators responsible for their company's WorkForce Time & Attendance system
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Prerequisites	Completion and Certification of Customer Certification Level I: Time and Attendance Troubleshooting
Duration	1 day
Class Size Limit	12
Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)

Course Content

- Gain familiarity the Policy Editor
- Perform maintenance functions to pay codes
- Make changes to current exception messages and e-mail messages
- Modify timesheet periods and bank displays
- Manage soft termination thresholds and calculation functions

CT-103 Time & Attendance Advanced Configuration Maintenance

This course enables participants to make substantial configuration changes to their WorkForce Software Time and Attendance system. Through instruction and interactive exercises, participants will dive into WorkForce's configuration tool to see how to establish system options and apply business rules to the system. The course will cover practical configuration approaches, tips, and best practices, as well as how to safely make and deploy configuration changes in a functioning production environment.

Audience	This course is intended for system administrators, business analysts, IT professionals, and others interested in implementing new system functionality.
Prerequisites	Completion and Certification of Customer Certification Level I: Time and Attendance Troubleshooting and Customer Certification Level II: Time and Attendance System Configuration
Duration	Experience with 4GLs, SQL, or macro languages.
Class Size Limit	5 days
Delivery	12

Course Content

- Introduction to configuration tools

- Understanding structural components of timesheet data structure, users, roles, employees, and assignments
- Learn how to configure user interface
- Modify timesheet calculations
- Configuration of data management tools (mobile and reports)
- Considerations when making changes to live environment

CT-110 Forecasting & Scheduling Troubleshooting

This course introduces the Super User concepts necessary to understand how the WorkForce Forecasting and Scheduling (WF&S) system works. Through instruction and interactive exercises, attendees will obtain an understanding of key functional and technical concepts and learn to perform initial troubleshooting.

Audience	Application Super Users responsible for their company's WorkForce Forecasting and Scheduling system.
Prerequisites	None
Duration	1 day
Class Size Limit	12
Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)

Course Content

- Manage employee and manager records
- Understanding user types, accounts and types of roles
- Loading data into to the system
- Managing system compliance
- Understanding system terminology

CT-111 Forecasting & Scheduling Administration

This course introduces the Administrator concepts necessary to understand how the WorkForce Forecasting and Scheduling (WF&S) system works. Through instruction and interactive exercises, attendees will obtain an understanding of key functional and technical concepts and learn to perform initial troubleshooting and system administrative tasks.

Audience	Application administrators responsible for their company's WorkForce Forecasting and Scheduling system.
Prerequisites	Completion and Certification of Customer Certification Level 1: Forecasting & Scheduling Troubleshooting
Duration	1 day
Class Size Limit	12
Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)

Course Content

- Managing leaves
- Enabling and performing job scheduling
- Perform payroll functions related to pay frequencies
- ESB processing and troubleshooting
- Configuration and maintaining SKR levels
- Managing hierarchy and tasks
- USB clocking, set up, and troubleshooting

CT-120 Custom Report Essentials

In this technical course participants will become acquainted with WorkForce's report development capabilities and learn about the data stored in the system. You will also learn details on where time and attendance data is stored in the WorkForce database and how to access it for reports, exports, or other purposes. In addition, you will learn report design basics, how to access the data to create useful reports, and how the Report Designer and WorkForce work together. You will also learn advanced techniques for designing and creating reports using the Report Designer.

Audience	Anyone who will develop custom reports, build reports to view WorkForce data, or build views of the data stored in WorkForce
Prerequisites	Attendees should have: <ul style="list-style-type: none"> • A solid understanding of basic database concepts • Basic proficiency in Structured Query Language (SQL)
Duration	4 days
Class Size Limit	6

Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)
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Course Content

Database Schema

- Introduction to WorkForce Time & Attendance database structure
- Introduction to most commonly used tables and queries for:
 - Employees and assignments
 - Pay periods
 - Timesheets
 - Exceptions
 - Accrual management
 - Schedules
 - Data Collection Terminals

Report Writing

- How WorkForce and the Report Designer work together
- Introduction to the Report Designer
- Introduction to report policy configuration
- Build your first report

Advanced Report Writing

- Advanced understanding of the Report Designer
- Creating sub-reports
- Creating cross-tabs
- Creating graphs
- Creating advanced formulas

CT-121 Analytics Universe Customization and Ad-hoc Reporting

The CT-121 Analytics course is taught at our Livonia, MI Headquarters.

In this technical WorkForce analytics report development course, participants will learn the capabilities and details about the data stored in the system. In addition, you will learn the basics of customizing the WorkForce sample universe and how to create and work with WorkForce Analytics reports.

This course incorporates the content in ANL01.

Audience	Anyone who will customize the sample universe and create WorkForce Analytics reports to view WorkForce data
Prerequisites	CT-120 Database Schema and Report Writing This is a technical course. Attendees should have: <ul style="list-style-type: none">• A solid understanding of basic database concepts• Basic proficiency in Structured Query Language (SQL)• Basic understanding of WorkForce or its Policy Editor.
Duration	1 day
Class Size Limit	6
Delivery	Instructor-led class at WorkForce Software headquarters (Livonia, MI)

Course Content

- Introduction to WorkForce Analytics functionality
- Introduction to the WorkForce sample universe structure
- Introduction to creating and modifying:
 - Courses and sub-courses
 - Objects and filters
 - Lists of values
- How WorkForce and the WorkForce Analytics tool work together
- Create and run queries in WorkForce

On Demand Training Services

Course Descriptions – WorkForce Training and Education

On Demand Subscription Courses by Subject

Absence Compliance Tracker

AC100 Core Concepts (Subscription)

Gain an overview of the Absence Compliance Tracker to bring staff up to speed on functional details.

Audience	Human resources and other personnel who manage your organizational leave request and compliance needs
Prerequisites	None
Duration	35 minutes
Class Size Limit	Online
Delivery	Human resources and other personnel who manage your organizational leave request and compliance needs

Course Content

- General terminology
- Fundamental employee management details
- User interface
- Leave requests
- Time off requests
- Viewing an absence case
- Approvals
- Administrator workflow
- Compliance issues

AC120 User Acceptance Testing (Subscription)

Gain insight into testing theory as it relates to Absence Compliance Tracker in order to learn how to develop effective test plans. Take this course early in the configuration phase of the project, so you have sufficient time to develop test cases for the user acceptance testing phase of the project.

Audience	Human resources and other personnel who manage your organizational leave request and compliance needs, or other staff responsible for test case development and validation
Prerequisites	TA120
Duration	20 minutes
Class Size Limit	Online
Delivery	Human resources and other personnel who manage your organizational leave request and compliance needs, or other staff responsible for test case development and validation

Course Content

- Understand the test environment
- Identify key configuration items to test
- Execute test cases to test your business requirements
- Coordinate testing
- Track test results and log issues

AC150 Employee Essentials (Subscription)

Learn to use Absence Compliance Tracker from the employee perspective to ensure compliance with federal, state, and local laws.

Audience	Employees who need to submit leave cases and human resource or other personnel assigned to manage cases
Prerequisites	None
Duration	30 minutes
Delivery	Online

Course Content

- Employee entry of leave requests

AC250 Case Manager Essentials (Subscription)

Learn to use Absence Compliance Tracker from the case manager perspective to ensure compliance with federal, state and local laws.

Audience	Human resources or other personnel assigned to manage cases
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Prerequisites	None
Duration	1.5 hours
Delivery	Online

Course Content

- Case manager entry of leave requests
- Case manager review of a case
- Case manager workflow
- Override system-determined leave eligibility
- ACT reports

AC350 Administrator Essentials (Subscription)

Take a guided tour through WorkForce workflow and other administrative tasks. This course is not necessary for customers who are also implementing WorkForce Time & Attendance.

Audience	Human resources, payroll, or other personnel assigned to administer the WorkForce application
Prerequisites	AC150
Duration	30 minutes
Delivery	Online

Course Content

- The WorkForce Administrative Customer
- Generate administrative reports
- Advance pay periods
- Import data
- Update system data
- User roles
- Schedule templates
- Maintain employee data in WorkForce
- Create new administrative users
- Emulate end user access

Advanced Scheduler

AS100 Core Concepts (Subscription)

Gain an overview of Advanced Scheduler to bring staff up to speed on functional details.

Audience	Staff responsible for managing organizational staffing needs
Prerequisites	None
Duration	45 minutes
Delivery	Online

Course Content

- General terminology
- Scheduling
- Define your organization
- Components of a schedule
- Employee schedule maintenance
- Find employees for open work assignments
- Overtime equalization
- Shift swapping
- Integration with Time & Attendance
- Security considerations

AS120 User Acceptance Testing (Subscription)

Gain insight into testing theory as it relates to Advanced Scheduler in order to learn how to develop effective test plans. Take this course early in the configuration phase of the project, so you have sufficient time to develop test cases for the user acceptance testing phase of the project.

Audience	Human resources, IT, payroll, management, or other staff responsible for test case development
Prerequisites	TA120
Duration	20 minutes
Delivery	Online

Course Content

- Introduction to basic test concepts
- Prepare to test
- Create test cases
- Manage test execution

AS200 Scheduler Essentials (Subscription)

Learn to manage complex employee schedules with our advanced scheduling tools.

Audience	Schedulers or other personnel responsible for managing employee schedules
Prerequisites	AS100
Duration	45 minutes
Delivery	Online

Course Content

- Use the Auto Scheduler to staff employees intelligently
- Manage schedule changes
- Manage employee availability
- Overtime equalization

AS350 Administrator Essentials (Subscription)

Learn to configure various building blocks within Advanced Scheduler.

Audience	Administrators who will configure and administer Advanced Scheduler
Prerequisites	AS200
Duration	1.5 hours
Delivery	Online

Course Content

- Configure the Auto Scheduler to staff employees intelligently
- Configure Advanced Scheduler tools to manage schedule changes
- Manage employee availability
- Configure overtime equalization

Data Collection Terminals

CL101 Introduction to Data Collection Terminals (Subscription)

Learn what terminal devices WorkForce Software offers and basics on how they run.

Audience	IT or other staff responsible for installing and providing maintenance for data collection terminals on your organization's network
Prerequisites	None
Duration	45 minutes
Delivery	Online

Course Content

- Review clock terminology
- Learn about supported terminals and their specific features
- Define the proper way to use biometrics
- Perform a swipe at a terminal

CL201 Deploying Data Collection Terminals (Subscription)

This class steps through the process of deploying a data collection terminal, from setting up the terminal and controller through setting up badges and biometrics.

Audience	IT or other staff responsible for installing and providing maintenance for data collection terminals on your organization's network
Prerequisites	CL101
Duration	45 minutes
Delivery	Online

Course Content

- Install and setup a terminal and controller
- Setup communication between the terminal and controller
- Troubleshoot terminal to controller communication issues
- Grant administrator enroller authority to badges
- Enroll employees in biometrics
- Change the root password for terminals
- Change the Clock Manager password

- Learn the communication protocols between the terminals, controllers, Clock Manager, and WorkForce

CL301 Managing Data Collection Terminals (Subscription)

Learn functions in the Clock Manager and basic troubleshooting techniques.

Audience	Staff responsible for operating and maintaining data collection terminals on your organization's network
Prerequisites	<ul style="list-style-type: none"> • CL101 • CL201
Duration	45 minutes
Delivery	Online

Course Content

- Troubleshoot:
 - Biometric and enrollment issues
 - Terminal communication and swap processing issues
- Obtain terminal and controller logs
- Resend data to WorkForce

CL401 Advanced Troubleshooting for Data Collection Terminals (Subscription)

Learn how to troubleshoot a variety of issues that can arise with terminals.

Audience	Staff responsible for operating and maintaining data collection terminals on your organization's network
Prerequisites	<ul style="list-style-type: none"> • CL101 • CL201 • CL301
Duration	45 minutes
Delivery	Online

Course Content

- Resolve badge data issues
- Fix swipe processing issues

- Remedy terminal and network issues
- Solve user error issues
- Use controller and terminal logs to identify an issue
- Walk through a terminal configuration to determine expected behavior

Time & Attendance

TA100 Core Concepts (Subscription)

Ramp up project staff up on WorkForce’s overall functional architecture.

Audience	Human resources, payroll, and other staff actively involved with project execution
Prerequisites	None
Duration	45 minutes
Delivery	Online

Course Content

- Identify the goals of the implementation
- Data collection terminals
- Data validation
- WorkForce terminology
- Security considerations
- Manager to employee relationships
- Synchronize employee data import
- Policy effective dating
- Import labor distribution data
- End of period processing
- Data exports
- Timesheet vs. pay frequency

TA120 User Acceptance Testing (Subscription)

Gain insight into testing theory as it relates to WorkForce in order to learn how to develop effective test plans. Take this course early in the configuration phase of the project, so you have sufficient time to develop test cases for the user acceptance testing phase of the project.

Audience	Human resources, IT, payroll, management, or other staff responsible for test case development
Prerequisites	None
Duration	2 hours
Delivery	Online

Course Content

- Introduction to basic test concepts
- Prepare to test
- Create test cases
- Manage test execution

TA150 Employee Essentials (Subscription)

Learn WorkForce navigation fundamentals and employee functions related to reporting time, activities, and absences in the system. Experience WorkForce from the employee's perspective.

Audience	Employees who will use WorkForce as well as company trainers, human resources, payroll, and managers responsible for managing or supervising employees who will use WorkForce
Prerequisites	None
Duration	1.5 hours
Delivery	Online

Course Content

- Introduction to the employee dashboard
- Enter data on a timesheet
- Request time off
- Use different timesheet views
- View pay results
- View time off bank balances
- Address timesheet exceptions and changes
- Run reports to look at your personal timesheet data

TA171 WebClock Time Entry Basics (Subscription)

In this course, attendees learn the basic features of the WebClock, including how to log in and out and transfer between assignments.

Audience	Employees who will use WebClock and managers or timekeepers who will approve timesheets for employees who use WebClock
Prerequisites	TA150
Duration	8 minutes
Delivery	Online

Course Content

- WebClock features
- WebClock transfers

TA177 WorkForce 4000 Time Entry Basics (Subscription)

In this course, attendees learn key features of the WorkForce 4000 and steps for performing common functions on the terminal, including how to punch in and out, transfer departments, and leave for and return from meal breaks.

Audience	Employees who will use the WorkForce 4000
Prerequisites	None
Duration	8 minutes
Delivery	Online

Course Content

- Feature overview
- Transfer overview
- Meal break overview

TA250 Manager Essentials (Subscription)

Become acquainted with WorkForce from the manager's perspective to learn functions and workflow related to managing employees.

Audience	Company trainers, human resources, payroll, and managers who will use WorkForce to manage other employees
Prerequisites	TA150
Duration	45 minutes
Delivery	Online

Course Content

- Introduction to the manager dashboard
- Learn how to approve and decline employee time off requests
- Learn how to modify, approve, recall, and amend employee timesheets
- Use WorkForce's group time entry screen
- Manage timesheet exceptions
- Delegate manager functions to another user
- Run reports to view and analyze employee timesheet data

TA300 Period End Essentials (Subscription)

This course guides payroll staff through the tasks needed to generate period end data.

Audience	Human resources or payroll personnel responsible for end of period timesheet processing tasks
Prerequisites	<ul style="list-style-type: none"> • TA150 • TA250
Duration	30 minutes
Delivery	Online

Course Content

- Introduction to the period end dashboard
- End of period processing workflow
- Lock and calculate
- Export data
- Close timesheets
- Advance the pay period
- Processing off-cycle jobs

TA350 Administrator Essentials (Subscription)

This course guides time and attendance administrators through the WorkForce workflow and other day-to-day administrative tasks.

Audience	Human resources or payroll personnel responsible for WorkForce administration
Prerequisites	TA150 TA250
Duration	1 hour
Delivery	Online

Course Content

- Introduction to the administrator's dashboard
- Create schedules for automated tasks
- Maintain calendars for holidays and other special dates
- Reset passwords
- Edit employee information
- Import and export data
- Maintain accrual banks
- Run tasks to update system data
- Perform server administration tasks