Employee Training

Company:_____   **Signed**:_____

Name:_____   **Position**:_____   **Date:** _____

Trainee to Complete: Please Tick

1. [ ] **Create Employee**
   Can you create a New Employee noting the Payroll Access options?

2. [ ] **Payroll Options View**
   Do you understand how the employee screen changes if you have no Payroll Access ?

3. [ ] **Date Selection**
   Has the Date Picker options been explained?

4. [ ] **Display Re-set**
   Can you re-set your personal display settings back to the default setting.

5. [ ] **Logon Access**
   Do you know how to assign logon access and passwords for an employee?

6. [ ] **Access Levels**
   Do you know how to assign and manage Access Levels?

7. [ ] **Access levels After Update**
   Do you understand why Access Levels are to be reviewed after an update?

8. [ ] **Photo ID**
   Can you print an Employee Barcode and a Photo ID for an Employee?

9. [ ] **Assign to a Department**
   How do you assign an Employee to a department and what benefits does this provide?

10.[ ] **Rep v Employee**
   Do you understand the difference between a Rep and an Employee?

11.[ ] **Creating a Representative**
   Can you create a new Rep?

12.[ ] **Rep Services**
   What is a Rep Service?

13.[ ] **Fixed Rate Service**
   What is the difference between a Fixed Rate Service and an Hourly charge out service?

14.[ ] **Employee Services**
   What is an Employee Service?

15.[ ] **Personal Preferences**
   Can you adjust your own Personal Preferences?

16.[   ] **Search Colour**
Can you set your own search colour?

17.[   ] **Reminders**
Does the Reminders prompts make sense?

18.[   ] **Pop Up Reminders**
Can you create a pop up reminder?

19.[   ] **Add to the Roster**
Can you add sick leave to a roster?

20.[   ] **Roster to Calendar**
Has the interaction between the Calendar and the Roster been explained. In particular, how days marked as unavailable on the Roster are displayed in the Main Calendar?

21.[   ] **Clock On/Off**
Can you clock in and out? F8

22.[   ] **Date Range and Speed**
Has the List Date Range options been explained when comparing speed to functionality?

23.[   ] **F5, F6 and F7**
Do you know how to use the F5,F6,F7 searching features? Also how to use the search box on the main screen.

Notes:
Are there any aspects in this area that more training would be useful?

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