



Total Payroll and HR Solutions

...anytime, anywhere, always online...

Training Brochure

2011

www.psiberworks.com

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1. Introduction

This brochure includes course scope, prerequisites, and scheduled course dates for the various PSiberWORKS training courses.

Scheduled training: Predefined courses with scheduled course dates:

- Overview & Concepts (PSiberWORKS)
- Getting Started on the Payroll (PSiberPAY)
- Human Resource Administration (PSiberSTAFF)
- Tax Submissions & Reconciliations - E@syfile (PSiberPAY)
- Bonus & Leave Closure Runs (PSiberPAY)
- Employment Equity, WSP, OID and SA Statistics (PSiberWORKS)

Unscheduled training: Predefined courses available on request:

- Advanced Payroll Processing (PSiberPAY)
- Human Resource Management (PSiberSTAFF and PSiberHRM)
- Employee and Managers Self Service (PSiberESS)

Tailored courses: available for those clients that wish to have customized training i.e. the course content can be selected from the list provided in this overview.

The Unscheduled and Tailored courses will be scheduled for a time that is convenient to both the trainer and the client.

All new users / clients must attend the **Overview & Concepts (PSiberWORKS)** prior to attending the other courses available.

Full course information is detailed within this brochure.

2. Overview & Concepts (PSIberWORKS)

Scope:

Duration: 1 Day

- Understand the PSIber **SLA, Client Support process, Communication, Product Releases** etc
- Understand the **design philosophy and methodology** of the PSIberWORKS system;
- Understand the full **extent of functionality available**;
- Understand **Group Companies, Access control and Permissions**;
- Understand the **terms used, navigation and functions** within PSIberWORKS;
- Setup and maintain basic Company data i.e. **Statutory information, Job Grades and Titles** etc;
- Setup and maintain **Employee data** including Mandatory statutory info, Employee Attachments etc;
- Print various **reports** i.e. Audit reports, Headcount reports, Length of Service Reports, Anniversary lists;
- Capture and Maintain **Digital Images; Forms and Policies & Procedures**;
- Setup **Imports & Exports** for mass update of Employee Information; View '**online API Guides**' and API file samples;
- Setup and processing of basic **Leave Management** i.e. Setup **Leave Levels including Additional Leave**, process Employee **Leave records**, print various leave reports;
- Better enforce company leave policies with **automatic leave balance adjustment** and **allocation** wrt maximum leave days;
- Setup **BCEA and additional leave** in separate counters;
- Setup **Current vs Carried forward** leave in separate counters;
- Manage **Sick leave** and **Other leave**;
- **Leave Reports**;
- View online '**Employee Leave Calendar**'.

Prerequisites

- PC Literacy

3. Getting Started on the Payroll (PSIberPAY)

Scope:

Duration: 1 Day

- Understand the **Design Philosophy and Methodology** of the PSIberPAY system;
- Understand the **structure and operation** of PSIberPAY;
- Understand the **terms used, navigation and functions** within PSIberPAY;
- Setup and maintain basic **Incomes, Deductions, Funds**;
- Setup of **Profiles for Total Package, Total Cost to Company and RFI**;
- Setup and maintain **Employee data** including YTD take-on data, Packages etc;
- Understand the importance of **Interface Codes** and how to set them up;
- Importing into **Time & Attendance** and **Time Costing**;
- Utilize the **Online Mass** facilities together with the API's to view and update the imported data e.g. YTD take-ons and adjustments, payroll adjustments etc;
- The payroll **Reconciliation process** and **reporting**;
- Process **Electronic Fund Transfers**;
- Print the **EMP201** and produce the **UIF File**;
- Print various **reports** i.e. **General Ledger, Fund Reports, Payroll summaries** etc
- Setup and processing of **Leave Pay** and **Leave Encashments**.
- Setup of **Additional Runs** and **Split/multiple runs**;
- Setup and Capture **Loans & Garnishees**;
- **Partial Period Calculations**;
- **Bonus calculation types** e.g. annual vs Recurring; pro-rate vs fluctuating earnings;
- Setup of **ITA88 (Garnishees)**;
- Employee **PAYE Reference numbers** import;
- **Review all functionality** available in the Payroll e.g. Email & SMS Notifications.

Prerequisites

- Completion of the **Concepts and Overview (PSIberWORKS)** Course.
- Previous Payroll experience and understanding of Payroll Principles and administration.

4. Human Resource Administration (PSIberSTAFF)

Scope:

Duration: 1 Day

- Understand the **design philosophy and methodology** of the PSIberSTAFF system;
- Understand the **structure and operation** of the PSIberSTAFF system;
- Understand the **terms used**, the **functions** and **navigation** within PSIberSTAFF;
- Understand and setup/maintain **Picklists**;
- Create and maintain basic **Employee data** such as:
 - Personal details
 - Dependants details
 - Job history
 - Passports & Visas
 - Licenses
 - Equipment and Clothing
 - Skills and Education
 - Medical Details & Accidents
 - Disciplinarys, Misconduct and Grievances
 - Training Records;
- Setup Engagement and Termination **check Lists**;
- Setup and printing of **Employee Contracts** and Templates;
- Print Company and Employee **reports**;
- Use **online Forms**.

EMAIL NOTIFICATIONS

- **Email Room** Setup;
- Setting up **Email Notification Persons** and link to employees;
- Manage **password formats** for system users and administrators;
- Setup **Email notification Rules** eg Leave Notifications and Contract Expiry.

Prerequisites

- PC Literacy;
- Previous HR experience and understanding of HR Principles;
- Completion of the **Concepts and Overview (PSIberWORKS)** Course.

5. Tax Certificate Submissions & Reconciliations & e@syFile (PSIberPAY)

Scope:

Duration: 1 Day

TAX CERTIFICATES (YEAR END AND INTERIM SUBMISSIONS)

- Understand the **Year End** and **Interim Submission** process;
- Understand the **Tax Certificate File** layout and content;
- Understand and gather **SARS Mandatory information**;
- Utilise **IRP5** codes, RFI and NRFI correctly;
- Amend **Year To Date** figures;
- Create, check and amend **Tax Certificates**;
- Create **Single or Consolidated Company** files;
- Utilise various **reports** to assist with **auditing, checking** and **reconciliation** before submission to SARS;
- Print **EMP201** and **EMP501** reports;
- **Reconciliation** Process;
- Understand the submission of the **IRP5 file** within **e@syfile**;
- **Print** and **email** Tax Certificates;
- **Enable** the new Tax Year.

Prerequisites

- PC Literacy;
- Previous Payroll experience and understanding of Payroll Principles and administration;
- Understanding of Statutory Payments and Requirements.
- **Getting Started on the Payroll (PSIberPAY)** Course attendance or PSIberPAY processing experience

6. Bonus & Leave Closure Runs (PSIberPAY)

Scope:

Duration: 1 Day

BONUSES

- Setup of **complex bonus structures** e.g. calculations, pro-rata, fluctuating;
- Use of Global adjustments, Mass Payroll Adjustments, API's etc for processing Bonus runs;
- Process **bonus provision** and understanding the calculation thereof;
- Setup **tax provision on bonuses, calculating** to run to Tax year end vs Calendar Year end;
- Setup **automatic payout of bonuses**;
- Setup bonuses to pay out in additional runs i.e. **separate payslip**;
- Display bonus information on **payslips**;
- Clear Bonus YTD Provision amounts;
- Understand all **Bonus provision** and **Tax Provision on Bonus** calculations.

LEAVE CLOSURE

- Utilize the '**Leave Closure**' function for the payout of wages during company closures;
- Setup of **Leave Closure Runs/intervals**, both single and multiple leave closure runs;
- Understand and setup **Leave Pay days vs Leave Taken days**;
- Importance of setting up correct **Tax Intervals**;
- Auto-calculate **leave pay** and generate leave records;
- Auto-calculate payroll incomes and deductions for multiple and partial **leave closure periods**;
- Understand **tax calculations** for leave closure periods;
- Processing of runs and additional runs during **leave closure period**.

Prerequisites

- PC Literacy;
- **Getting Started on the Payroll (PSIberPAY)** Course attendance or PSIberPAY processing experience.

7. Employment Equity, WSP, SA STATS & OID (PSIberWORKS)

Scope:

Duration: 1 Day

EMPLOYMENT EQUITY

- Understand the purpose and content of '**Employment Equity Returns**';
- Setup **Company & Employee parameters** to ensure accurate Employment Equity Reporting;
- Understand and setup of Equity **Reporting Periods** and Reference number grouping;
- Set up of **Equity Goals** by Level and Category;
- Process Employment Equity reports for **individual payrolls** and **across companies**;
- Importing of **Equity Remuneration** where PSIberPAY is not used;
- Online capture of **Employer** specific information e.g. Barriers etc;
- **Audit** payrolls to validate required information;
- Employment Equity reporting with respect to **transferred employees**;
- Employment Equity **reconciliation reports and processing**;
- Submission of Equity Returns.

WORKPLACE SKILLS PLANS

- Compile a **Workplace Skills Plan** for the coming period;
- **Reconcile** training costs per **Occupational Category/OFO Code**;
- Produce an actual training report (**ATR**) for submission.

OID RETURNS

- **Statutory** requirements;
- How to Calculate **OID Earnings**;
- Produce & Reconcile a **OID Return**.

SA STATISTICS

- **Statutory** Requirements;
- How to **Reconcile**;
- Produce the **SA Statistics Return**.

Prerequisites

- PC Literacy;
- Completion of the **Concepts and Overview (PSIberWORKS)** or **Human Resource Administration (PSIberSTAFF)** Course.

8. Advanced Payroll Processing (PSiberPAY)

Scope:

Duration: 1 Day

PAYROLL PROCESSING

- Payment of **Overtime** on **previous Rate of Pay** values;
- Setup and process automated **Backdated Increases**;
- **Temporary Packages**;
- Setup and processing of **Activity Costing**;
- Process **Advanced EFT's** and **GL** interfacing;
- Understand **Arrears & Recovery Loans**;
- **Customize payslips** e.g. messages, company logo's, languages etc;
- Setup and use of User Fields and Customised fields.

PROFILES

- Understand the use and application of **Profiles**;
- Understand Profiles as used in **Partial Payment periods** i.e. engagements and terminations;
- Setup **leave provision** profiles and parameters;
- Setup **leave profiles** for the calculation of Leave Provision/Liability, Leave Encashments and Leave Pay;
- Process **Leave Pay** and **Leave Encashments**;
- Setup of **Part TCE** (Total Cost of Employment) Profiles and Packages;
- Setup and understand the importance of **RFI Profiles**;
- Use Profiles in **Backdated Package** changes;
- Understand the use of Profiles in **Leave Closure** processing;
- Use **Calculation Profiles** to setup complex Income and Deduction calculations;
- Link Profiles to **Incomes, Deductions and Employees**.

BUDGETING

- (available from May 2011)

Prerequisites

- **Getting Started on the Payroll (PSiberPAY)** Course attendance;
- Previous Payroll experience and understanding of Payroll Principles and administration;
- Understanding of Statutory Payments and Requirements.

9. Human Resource Management (PSIberSTAFF & PSIberHRM)

Scope:

Duration: 2 Days

PERFORMANCE MANAGEMENT

- Setup up and use an **Appraisal Template** to appraise an employee;
- Capture employee **Appraisal Details** including key performance area, behavioural attributes, multi-rater feedback, rewards and promotability;
- Capture a **Performance and Potential Analysis**;
- Capture a **Risk and Retention Analysis**;
- Capture a **Promotability analysis**;
- Capture and track **Skills and Experience** gained;
- Capture and track **Identified and Resolved Needs**;
- Capture and track **Company and Individual Development Plans**;
- Prepare **Succession Plans**.

TRAINING MANAGEMENT

- Capture and maintain **Employee Training Records**;
- Understand the purpose of **Workplace Skills Plans (WSP)**.

POSITION MANAGEMENT

- Create and maintain **Organisational Units** and **Position** details such as location details, financial information, and potential successors, and assign employees to positions;
- Create and maintain your **organisation structure** (hierarchy).

JOB DESCRIPTIONS

- Create and maintain **Job Descriptions** within your organisation and **link to Positions**;
- Define basic job description details such as job grades, personal criteria, skills and experience, and Key Performance Area and tasks for each job;
- Create and maintain a **database** of commonly used **Tasks**.

Prerequisites

- PC Literacy;
- Previous HR experience and understanding of HR Principles;
- Completion of the **Human Resource Administration (PSIberSTAFF)** Course.

10. Employee & Managers Self Service (PSIberESS)

Scope:

Duration: 1 Day

- Manage **password formats** for system users and administrators and ESS users;
- Setup '**reporting-to-persons**';
- Setup Employee Self Service permissions for **employees** and '**reporting-to-persons**';
- Setup Employee Self Service **parameters for leave types** and details;
- View and update **personal information**;
- Setup email notifications for **leave and loan applications**;
- Process Employee leave applications and authorize via Managers Self Service;
- Process a **loan application** and authorization thereof;
- View **leave and loan reports**;
- View Rate of Pay and **Package History**;
- Print Previous **Payslips and Tax certificates**;
- Employee **Attachments**;
- View **Company Policies** online;
- Setup Employee and Company **Vehicles**;
- Setup **Client list** for Business Expenses;
- Capture **Business Expenses** within ESS;
- Manage Employee **Travel Logs, Medical and Other Expenses** for Tax Returns;
- Print various **Forms and Reports**;
- Add, view and delete an **attachment**;
- View the **Leave Calendar**.

Prerequisites

- PC Literacy;
- Completion of the **Concepts and Overview (PSIberWORKS)** or **Human Resource Administration (PSIberSTAFF)** Course or previous experience on PSIberWORKS.

11. Tailored Training – Content Selection

Content Options:

Duration: dependent on content

PRODUCT (Area of Functionality)	If required, mark with "X"
Technical	
Installation	
Upgrades	
Full Implementation	
System Administration & Utilities	
User Permission Management	
Password Management	
Picklist Maintenance	
Email notifications	
Submission of UIF file	
Imports and Exports	
Interface codes	
Mid-Month Transfers	
Continue Service	
Transferring of Discharged employees	
Other	
EXCEL : API, and report manipulation	
Images	
Attachments	
Statutory & Other Calculations	
UIF, SDL, OID (incl. Remuneration and Calculations)	
RFI & NRFI, Allowable Pension & RA Deductions, Medical Aid FB & Taxable deductions	
Tax, Bonus, Bonus Provisions, Tax Provision on Bonus	
Calculations : Leave Closure, Leave Pay, Leave Encashment	
Employment Equity, Workplace Skills, SA Stats	
Company Details	
Parameters	
Organizational Setup ie JG, JT, CC, Depts, etc	
Profiles	
Incomes, Funds & Deductions including Overtime Rules	
Bonuses	
User Payslip Fields and Customized Fields	
Employee Maintenance	
Loans, Garnishees & Savings	
Pay Info, Package & YTD's	
Take on Totals & Year to Date Adjustments	
Temp Packages & Future Packages	
Tax overrides and voluntary over-deducts	
Customized Input	
Mass Capture Facilities	
Retirement Funding Income	

PRODUCT (Area of Functionality)	If required, mark with "X"
Pension Fund, Provident Funds, Medical Aids & RAs	
Loans / Savings / Garnishees	
Shares	
Process Payroll	
Payroll Intervals (Leave Closure, split runs, additional runs)	
Overtime on Previous ROP, Backdated Increases	
Partial Intervals; overtime on Previous ROP	
Split Runs, Additional runs, Leave Closure, Backdated Increases	
Time & Attendance and shift workers	
Time/Activity Costing & Cost Centre Splits	
Global & Backdated payments	
Mass Capture VS Global Change	
Mass payslip Adjustments	
Run Payroll	
GL Setup	
Electronic Funds Transfers	
Reporting & Payroll Reconciliation Process	
Year End & Tax Certificate Submissions	
Year End Processing & Reconciliation Process	
YTD adjustments, IPR5 Amendments	
August and Year end Submissions (incl. e@syfile & EMP501)	
Reports	
Payslip Customization	
Logo setup	
Auto Reports	
MyReports Option	
Customized Reports	
Consolidated Reporting	
Bureau Reports	
Leave Setup, management & Reporting	
BCEA Leave, Annual, Sick and Other Leave	
Additional & Lump sum Leave	
Forfeiting and Rollover Rules	
Leave Pay, Unpaid Leave and Encashment Payments	
Mass Capture of Leave ie API, Global, Mass	
Leave Reporting	
Human Resource Administration	
Company Details / Parameters System Parameters	
Organisation Set Up	
Vehicles Insurance	
Workplace Skills Plan Setup & Details	
Appraisal Templates	
Employee Maintenance / Details / Marital / Dependents	
Emergency Details	

PRODUCT (Area of Functionality)	If required, mark with "X"
Passports / Travel Docs & Visas	
Housing	
Membership / Unions / Professional Bodies	
Vehicles / Licence Fines / Company Vehicles / Private Vehicles	
Insurance Policies	
Offences	
Medical Details / Allergies / Disabilities / Medicals	
Accident Details	
Education / School / Tertiary & Other Qualifications	
Training History / NQF Details / Course Details / Costing etc	
Contract Details	
Restrictions	
Skills and Experience	
Development Plans & Needs	
Languages	
Performance & Succession	
Appraisals / KPA Ratings / Behaviour Ratings / Outcomes / Rewards	
Performance & Succession & Potential Analysis / Risk & Retention	
Promotability Analysis	
Performance Summary	
Employment History / Job Details / Recruitment History	
Correspondence / Interview Details / Reference Checks / Offers	
Disciplinarys / Grievances / Misconduct	
Equipment & Clothing	
Exit Details / Interview & Discussion Details	
Referral Details / Restraint of Trade / Forwarding Info	
Company & Audit Reports	
Employee Reports	
Employment Equity Reports	
Forms & Templates	
Government Returns	
Leave Reports	
Loans, Garnishees & Savings Reports	
Performance & Succession Reports	
Reports	
Quick Enquiries	
Skills & Training Reports	
HR Management	
Position Management	
Performance Management	
Training Management	
Job Descriptions	
Contract Resourcing & Block Visas	

PRODUCT (Area of Functionality)	If required, mark with "X"
Employee & Manager Self Service	
Leave and Loan Applications	
Business Expenses & Travel Logs	
Personal Expense Logging	
Attachments, view Payslips and Tax Certificates etc	

12. Booking Procedures

- Please select the scheduled training course or provide the selected course content for the tailored courses.
- Kindly complete the [Booking Form](#) (herewith attached / below) and fax or email to **011 454 1073 / training@psiber.co.za**.
- Once the Booking Form is received, you will be notified of availability for the required training. If we are unable to accommodate you on the required training dates, alternate dates will be provided, for which a new Booking Form will be required
- Once availability has been confirmed with you, an invoice will be issued and an electronic copy sent to you for payment.
- On receipt of payment, training confirmation will be sent to you.

13. Cost

Scheduled & Unscheduled Courses

The cost per training course, as detailed in this brochure, is **R1,200.00 per delegate per day (excluding VAT)**. This includes all course materials, refreshments and a light lunch. Group discounts are as follows:

3 to 4 delegates	15% discount
5 or more delegates	25% discount

Tailored Courses

Normal daily training costs apply. The duration of the training will be dependent on your selection of functionality that you require us to include on the course. A quotation will be provided on receipt of your Booking Form.

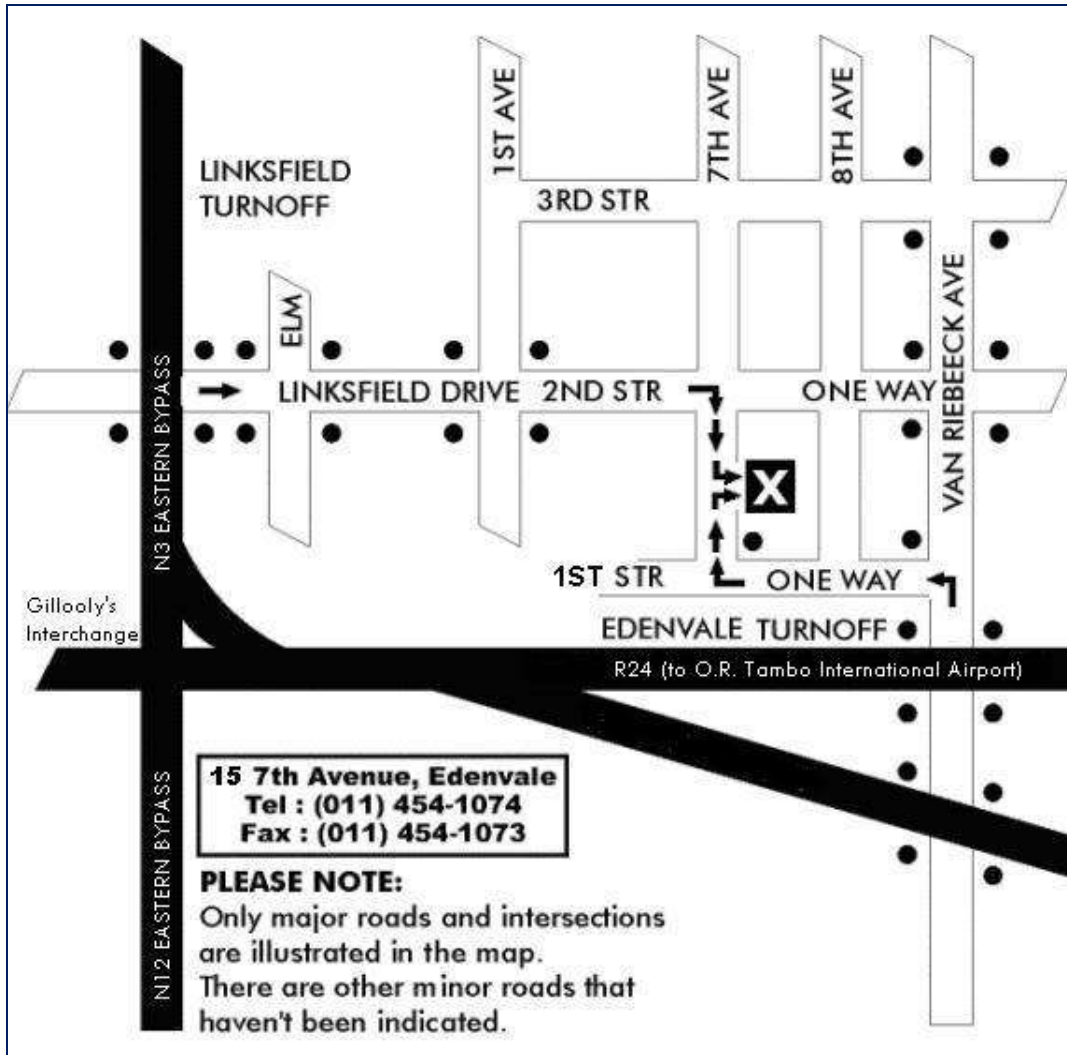
14. Agenda

	Full Day	Half Day
Registration	08h00 - 09h00	08h00 – 09h00
Start of training	09h00	09h00
Mid-morning refreshment	10h30 - 10h45	10h30 – 10h45
Lunch	12h00 - 13h00	12h00 – 13h00
Continued training	13h00 – 14h30	
Mid-afternoon refreshment	14h30 - 14h45	
Feedback session	16h00 - 16h30	
End of training	16h30	

15. Venue

Training courses are hosted at the PSIber offices, 15 Seventh Avenue, Edenvale.

GPS co-ordinates – latitude 26.15°S, longitude 28.15°E



PSIber also provides on-site training for your convenience. This may be arranged with our Training Department directly. Standard hourly consulting rates and travel costs will apply. Please call our Support Desk for more detail.

16. Contact Information

Telephone Number	011 454 1074 or 011 453 9343 / 4
Fax Number	011 454 1073
Email Address	training@psiber.co.za or support@psiber.co.za
Website	www.psiberworks.com

17. Scheduled Training & Workshop Calendar

January	February	March	April
Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
May	June	July	August
Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
September	October	November	December
Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

- Overview & Concepts (PSiberWORKS)
- Getting Started (PSiberPAY) or Human Resource Administration (PSiberSTAFF)
- Tax Certificate Submission & Reconciliations & e@syFile)
- Employment Equity, WSP, SA STATS & OID (PSiberWORKS)
- Bonus & Leave Closure Runs (PSiberPAY)

- South African Public Holidays
- Tax Workshops

18. Important Dates to Remember

Tax Year End Workshops	8th, 9th & 10th March 2011 Johannesburg, Durban & Cape Town
	5th, 6th & 7th April 2011 Johannesburg, Durban & Cape Town
Deadline Dates	31st May 2011 1 st Annual Tax Certificate Submission for the period 01/03/10 to 28/02/11
	31st October 2011 August Interim Tax Certificate Submissions
	30th September 2011 Employment Equity Submission (Manual)
	30th June 2011 Workplace Skills Plans
	31st March 2011 Return of Earnings (OID)

END OF DOCUMENT

Training Brochure 2011