



ADP freedom

Client Training Catalogue

Spring Edition – 2011

ADP Client Training; delivering innovative training solutions to support
ADP's world class products and service



Institute of IT Training
Gold Standard
Accredited Training Provider



PAYROLL



TIME & ATTENDANCE



HUMAN RESOURCES



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Catalogue introduction

The purpose of this catalogue is to provide you, the client, with a complete overview of all ADP freedom training products.

The product flow charts will guide towards the most suitable training path. The course overviews will then provide a further breakdown of the topics therein.

Should you have any further questions please feel free to contact us on 01932 597 346 or email us at client.training@adp-es.co.uk

Chertsey Training Facility

ADP Employer Services
Syward Place
Pycroft Road
Chertsey
Surrey
KT16 9JT

Web: www.adp-es.co.uk

Stockport Training Facility

ADP Employer Services
Highbank Side
St. Peters Square
Stockport
SK1 1HG



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Trainee orientation

Where is ADP?

We have training facilities in Chertsey and Stockport. Maps and directions will be provided in your joining instructions after booking.

Our Chertsey centre is ADP's head office. It contains four training rooms all with Smart board technology and PCs for each trainee.

Stockport has one training room with the same features as Chertsey.

Trainers

All of our trainers are certified and have been trained by the institute of information technology training (IITT). This ensures that you will receive the same high standard of training regardless of your trainer.

Behaviour and effort

ADP has set guidelines on acceptable behaviour. These guidelines are to be followed by everyone, staff and trainees alike.

Expected behaviour includes (but is not limited to):

- Being respectful toward all other participants and the trainer
- Being polite and courteous to all other participants and the trainer
- Being punctual to training
- Being patient and sensitive to the needs of other participants
- Active, constructive and responsible participation in all activities
- Asking questions relevant to the topic at hand
- Providing comments that add to the learning experience of participants in the group

Unacceptable behaviour includes (but is not limited to):

- Swearing
- Language that may be considered as offensive
- Harassment / abuse
- Vilification
- Slander, ridicule and/or using demoralising or other comments or language that erode the dignity of the subject
- Intimidation
- Libel or libellous acts or comments
- Inciting others to any unacceptable behaviours
- Discrimination and behaving in an insensitive manner toward individuals regarding their race, religion, sex or other aspect of their person or that may be considered as offensive or discriminatory
- Disruptive behaviour including:
 - Continued interruptions to the class with unrelated materials, questions or comments
 - Continuing any unacceptable behaviour after being asked to curb that behaviour

The decision to continue to allow a candidate to participate in a training course is at the discretion of the trainer and the ADP training team.

Pre-requisites

By returning your booking form, you are confirming that you have read any pre-requisites for the event and that the delegate(s) meet the minimum requirements.

Implementation action list

Many of you will be going through an implementation process whereby you are about to begin using an ADP product for the first time. During the course you are likely to have questions specific to you and your company.

As the courses are generic, in these cases your trainer will direct you to log these questions as an action list to then speak with your implementation or H.R. consultants about, as they will be able to answer your client specific questions.



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General amenities

All of our training facilities have the following features:

- Close to shops
- Tea / coffee making facilities
- Toilets (male, female and disabled)
- Located within comfortable walking distance of train stations
- Located within comfortable walking distance of hotels, a list of which we can send you on request

Smoking

Both buildings are non-smoking. There are smoking areas and provision for disposing of butts and rubbish.

Punctuality

We ask our delegates to be at our site half an hour before the course start time. This gives some leeway for transport issues. If you are going to be late please ring ahead to let us know. If you are late, we reserve the right to refuse entry to the course.

Parking

Our Chertsey centre has free visitor parking and the Stockport centre is near to a public pay car park.

Attire / dress code

Please wear neat, tidy casual or business clothing. As a guideline, neat jeans and a shirt are fine. Hats, caps and sunglasses are not to be worn while indoors.

Lunch

At our Chertsey and Stockport sites you will be taken out for an hour lunch during your course. In Chertsey the food is Italian and in Stockport it is Mediterranean. Both restaurants are within a five minute walk of the centres. If you have any particular dietary requirements please let us know and we will endeavour to accommodate your request.

Upon arrival

At our Chertsey location, please note that entry to the building is at the rear of our premises, through our car park, and not through the doors opposite the roundabout. Proceed through the car park to our reception area. Please report to reception when you arrive and you will be handed your security pass for the day. You will be directed to the break room where you should remain until your trainer comes to meet you.

Taxis

Should you need to order a car to collect you at the end of the day, arrangements can be made via your trainer.

Training Rooms

All rooms have water provided and are near bathroom facilities. Each trainee has their own PC to use during the course. Smart board technology is in each room as well as SynchronEyes software allowing the trainer to observe and share trainee screens.

Break Rooms

Your training day will include two 15 minute breaks one morning and one afternoon. In the break rooms you will have access to a range of hot drinks as well as some small snacks.

Individual Requirements

If you have any particular needs for your training day, for example if you need to be seated towards the front of the room for viewing purposes, or if you need wheelchair access please let us know beforehand so we can make the necessary arrangements. We will do everything we reasonably can to make the course as comfortable as possible for all trainees.



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ADP freedom training course overviews

This section displays two flow charts designed to help you decide what training sessions you need to attend. If you are a managed service client you will need to use the first flow chart (in the Managed section) and if you are a processing client you will need to use the second flow chart (in the Processing section).

ADP Managed payroll service

ADP is responsible for uploading and validating the data as per the payroll procedures and checking the data prior to payroll submission

ADP builds a payroll procedures document which drives your payroll calculations and outlines the rules of your payroll

The Client does not require dedicated payroll staff

The Client has a direct point of contact for payroll queries, i.e. a payroll person at ADP

The Client has an employee contact helpline at ADP, i.e. a number for your employees to call ADP on

ADP acts as your agent to HM Revenue and Customs and communicates directly on your behalf

ADP provides a full payroll disbursement service that encompasses all HM Revenue and Customs, third party and exception payments

ADP processing payroll service

Payroll data is input to the system by the client who retains an in-house payroll skilled person / people

Client checks and validates their data and then commits the payroll data to ADP for processing

Client payroll contact has access to helpline assistance from ADP

Client retains responsibility for managing their own payroll rules

Client also retains responsibility for dealing with HM Revenue and Customs

We offer two types of training course:

Classroom based training

These courses are traditional instructor led classes usually lasting for a full day or half a day. We run these types of course from our dedicated training facilities in both Chertsey and Stockport.

Each course has a maximum limit of eight trainees, apart from System Administration and Training & Development which are limited to five trainees.

Virtual classroom training

Virtual Classroom courses are two hour sessions concentrating on specific topics conducted over the internet. You will be sent pair of headphones (including a microphone), a training manual and log in details. At a certain time you will log in to the virtual training website where you will meet the Trainer in a virtual classroom.

There are a maximum number of six delegates on a VCT session.

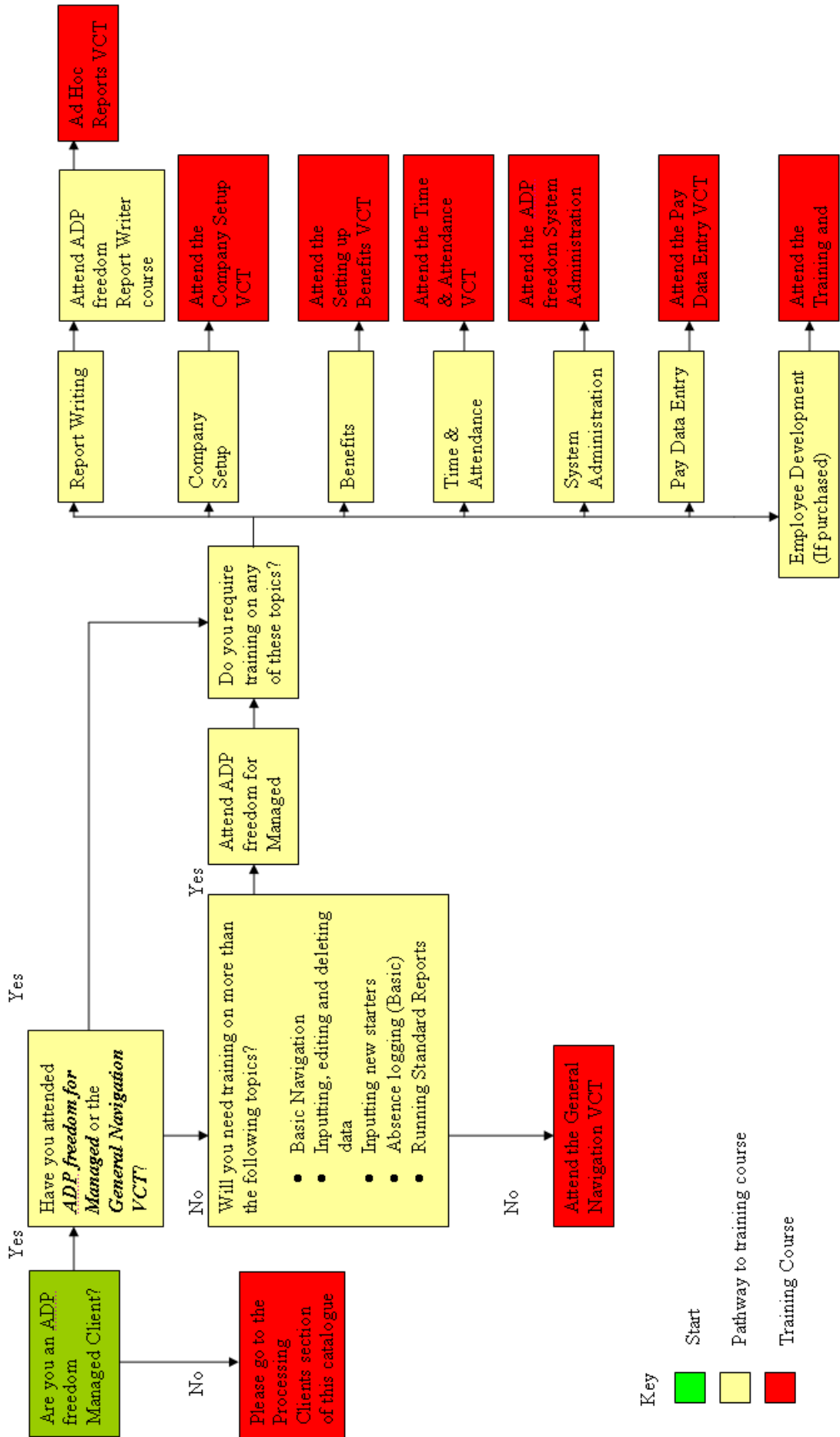


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Managed Clients Course List



ADP freedom for Managed (Classroom based training) Course overview

This course has been specifically created for managed clients and provides the skills and knowledge necessary to use ADP freedom to make day to day human resources and payroll related changes.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using Microsoft Windows and are computer literate
3. You are able to use English to a working level

Topics covered

- Introduction to ADP freedom
This will include brief descriptions of ADP freedom terminology
- System navigation
This section will look at navigating around the home page and searching for individual employees
- Inputting a new starter using quick start
- Absence management
This section of the course will look at recording and modifying various types of absence using the absence dashboard. Recording sickness will be covered including the recording of medical certificates and accidents
- Promotions & new roles
Assigning new appointments to employees
- Salary adjustments
- Amending Personal Records for Employees
- Amending Employment Records for Employees
- Amending Payroll Information for Employees
- Reviewing the payroll
This section will look at post calculation review, payrun reports and pre / post commit reports Payroll extracts
- Pay data entry grids – user features
- Inputting a leaver

Objectives – upon completing this session, you will be able to correctly:

- Enter a new starter into ADP freedom
- Log and manage employee absence
- Review payroll calculations
- Make pay rate adjustments
- Terminate an Employee
- Manage the lifecycle of an employee on ADP freedom

Course Title ADP freedom For Managed

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom System Administration for Managed Clients

(Classroom based training)

Course overview

This course has been specifically created for system administrators of managed clients and provides the skills and knowledge necessary to make specific and required changes to ADP freedom to ensure smooth day to day running of the system. This is an advanced course that may not be taken as part of in contract days thus a charge will apply.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom For Managed course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Setting up new Business Units
- Setting up/Editing Job/Position
- Change of reporting and hierarchical structure Show the Org charts
- Changing the Enterprise lookups (Cost Centre, Business Locations, Company Vehicles, Leaving reasons, Absence reasons and Pay Rate Change Reason)
- Some HR screens (e.g. Disciplinary/Grievance)
- Setting up company benefits
- Pay data entry grids– user features
- Importing variable pay data using PDE grid template exports
- Attaching files to an employee's record
- EE Development (skills and experience)
- Setting up and editing system reminders
- Payslip summary view and the e-payslips
- Setting up/Editing Shift Patterns

Objectives – upon completing this session, you will be able to correctly:

- Change or edit Business Unit, Job and Position details
- Edit and change the reporting and hierarchical structure
- Add or delete options in the enterprise lookups
- Change a range of employee records (e.g. Disciplinary/Grievance, File index)
- Assigning company benefits to Employees
- Creating pay data entry grids with common variable earnings and deductions
- Create Import template for PDE
- Record employees skills and experience
- Setting up and editing system reminders
- Review an employees payslip history
- Create and edit shift patterns

Course Title ADP freedom System Administration For Managed Clients
Course Duration 1 Day (10:00 – 16:30)
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
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ADP freedom Report Writer

(Classroom based training)

Course overview

This course has been specifically created for ADP freedom clients and provides the skills and knowledge necessary to run, create and view useful reports. Delegates will have a choice of reports they wish to build during the course (including absence and payslip data) and will then use more examples to create several other reports.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Introduction to reporting in ADP freedom
- Running standard reports
- Adding report categories
- Creation of ad hoc reports
- Adding fields
- Formatting reports
- Headers and footers on reports
- Formulas on reports
- Sorting on reports
- Titles on reports
- Grouping on reports
- Filters on reports
- Parameters on reports
- Excel exports
- Mail merge extracts

Objectives – upon completing this session, you will be able to correctly:

- Run a standard report
- Create and run an Ad Hoc report
- Select employees using filters and Parameters
- Print and Export reports
- Run a mail merge extract
- Format the layout and design of your report

Course Title ADP freedom Report Writer

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom Training & Development

(Classroom based training)

Course overview

This course has been specifically created for ADP freedom clients who have purchased the employee development component and provides the skills and knowledge necessary to record and maintain employee development information.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Maintaining the skills dictionary
- Maintaining an employee training record
- Creating the training catalogue
- Recording employee development needs
- Appraisals
This session will look at the appraisal process using ADP freedom; how you schedule appraisals and how you access the forms. It also looks at how you build and design the appraisal forms within ADP freedom
- Competency framework
If a company has a competency framework set up, an appraisal form can include a link to the competency framework. Specific competencies can be linked to the role through the skills profile
- Essential training
It is possible to set up training activities that are essential for an employee filling a specific role to attend
- Build skills profiles and searches
Creating profiles for business units, jobs, grades or positions that specify skills required in that area. It is also possible to create profiles for positions that have not yet been created in the company structure. You are then able to search for employees who have these skills
- Running standard training and development reports

Objectives – upon completing this session, you will be able to correctly:

- Add training (activities and needs) to an employee record
- Build appraisal forms
- Schedule appraisals
- Input appraisals
- Use, add and maintain the skills dictionary
- Use the training catalogue
- Use the competency framework
- Use skills profile

Course Title ADP freedom Training & Development
Course Duration 1 Day (10:00 – 16:30)
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
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Managed Clients Virtual Classroom Training (VCT) Courses

ADP freedom Company Set up

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who are either in the process of filling out implementation workbooks or who need to maintain the structure within the system.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have a working knowledge of your company's HR organisational structure
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Business Units
- Jobs
- Positions
- Shift Patterns
- Organisation charts

Objectives – upon completing this session, you will be able to correctly:

- Understand when the information is required
- Understand why the information is required
- Understand what needs to be entered onto the system

Course Title ADP freedom Company Setup VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom General Navigation

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but do need to know the basics around navigating the system and basic inputting.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using Microsoft Windows and are computer literate
3. You have tested the link into VCT sent to you by ADP after you book your place
4. You are able to use English to a working level

Topics covered

- What is ADP freedom
A brief introduction, and a little about the system and some of its terminology
- Logging into ADP freedom
- Home Page Navigation
How to navigate to the screens and employees you wish to view
- Basic screen navigation
The different types of fields and how to use them
- Inputting a New Starter
The basics to getting a new employee on to the system
- Logging Absence
- Running standard reports

Objectives – upon completing this session, you will be able to correctly:

- To understand what ADP freedom is and some of its capabilities
- To be able to successfully navigate through the system
- To enter a new starter on the system
- To find and enter absence information
- To run standard reports

Course Title ADP freedom General Navigation VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Managing Absence for Managed Clients

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but will be required to manage absence in the system.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed classroom course **or** an ADP freedom General Navigation virtual classroom training course
3. That you have a working knowledge of absence management
4. You are proficient in using Microsoft Windows and are computer literate
5. You are able to use English to a working level
6. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Introduction to the absence dashboard
A brief introduction to the screen and how it is laid out
- Recording a basic absence
- Modifying a previously recorded absence
How to make changes to existing absence records
- Recording sickness
This section looks at recording sickness using the absence dashboard and recording related medical certificates
- Accidents at work
Linking accidents at work to an absence record
- Recording medical certificates
- Viewing annual leave balances
- Standard absence reports
- Occupational sick pay
Forcing and withholding

Objectives – upon completing this session, you will be able to correctly:

- To navigate, enter information, and modify absences within ADP Freedom
- To enter medical certificates for absences
- To enter accidents and link them with absences
- To navigate and run standard absence reports in ADP Freedom

Course Title Managing Absence in ADP freedom VCT
Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
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Pay Data Entry for Managed Clients

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but will be required to either set up and / or run variable payroll data processes.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics Covered

- Set up of pay data entry batches
- Adding employees to a batch
- Entering variable pay data on a PDE grid
- Verification of data
- Rectifying errors

Objectives – upon completing this session, you will be able to correctly:

- Create a new PDE Batch
- Enter variable pay into a PDE Grid
- Use the right click options in a grid
- Identify any errors in a Grid
- Perform Imports / Exports of PDE grids

Course Title Pay Data Entry VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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Ad Hoc Reports: Filters and Parameters

(Virtual classroom training)

Course overview

The purpose of this course is to give a more detailed account of certain elements from the Report Writer classroom course and expand on the delegates understanding of these elements. Delegates will create and run common examples of ad hoc reports (including pension contributions and headcount reports).

Pre-requisites

Before attending this course, it is mandatory that you:

1. Have read the course overview
2. Have attended a Report Writer classroom course
3. Are proficient in using Microsoft Windows and are computer literate
4. Have tested the link into VCT sent by ADP
5. Are able to use English to a working level

Topics Covered

- Creation of ad hoc reports
- Adding fields
- Sorting on reports
- Grouping on reports
- Filters on reports
- Parameters on reports

Objectives – upon completing this session, you will be able to correctly:

- Use filters and parameters to specify reporting data required
- Demonstrate the use of filters, parameters, groupings and summaries
- To be able to successfully create and run an ad hoc report

Course Title Ad hoc reports: Filters and Parameters

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
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Setting up Benefits for Managed Clients

(Virtual classroom training)

Course overview

The purpose of this course is to understand how to set up benefits within ADP freedom and also to comprehend the set up of levels of coverage, costs / contributions and earnings / deductions. This course has been specifically created for ADP freedom clients who have purchased and are utilising the Benefits functionality.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics Covered

- Creating new benefits within ADP freedom
- Linking benefits to payroll earnings / deductions
- Benefit lookups
- Benefit coverage levels
- Benefit plans
- Allocating benefits and benefit plans to employees
- Benefit reporting

Objectives – upon completing this session, you will be able to correctly:

- Create a new benefit
- Edit existing benefit details
- Link benefits to the payroll
- Create benefit plans
- Assign benefits and plans to employees
- Identify relevant benefit reports

Course Title Setting up Benefits in ADP freedom
Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
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ADP freedom Employee Lifecycle

(Classroom based training)

Course overview

This course has been specifically created for processing clients and provides the skills and knowledge necessary to use ADP freedom to maintain employee information.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using Microsoft Windows and are computer literate
3. You are able to use English to a working level

Topics covered

- Introduction to ADP freedom
This will include brief descriptions of ADP freedom terminology
- System navigation
This section will look at navigating around the home page and searching for individual employees
- Inputting a new starter using quick start
- Absence management
this section of the course will look at recording and modifying various types of absence using the absence dashboard. Recording sickness will be covered including the recording of medical certificates and linking absence to the accident log. The maternity assistant will also be covered
- Promotions & new roles
Assigning new appointments to employees
- Salary adjustments
Using the pay Rates screen
- Amending Personal Records for Employees
- Amending Employment Records for Employees
- Adding/Amending bank details.
- Employee development (skills recording)
- Inputting a leaver

Objectives – upon completing this session, you will be able to correctly:

- Navigate around the ADP Freedom system
- Enter a new starter into ADP Freedom
- Input and change a range of employee data including: skills, grievances and new appointments
- Assign earnings to employees
- Adjust employee pay rates
- Manage absence recording
- Terminate an employee
- Manage the complete lifecycle of an employee on ADP Freedom

Course Title ADP freedom Employee Lifecycle

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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ADP freedom Day to Day Payroll

(Classroom based training)

Course overview

This course has been specifically created for processing clients and provides the skills and knowledge necessary to use ADP freedom to the payroll and perform common employee payroll tasks.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
1. You have attended an ADP freedom Employee Lifecycle course
2. You have a working knowledge of UK payroll legislation
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Pay run management
- Pay cycle review
- Calculating the payroll
- Post payroll calculation review
- Payroll reporting (Pre and Post commit)
- Payslip reversal
- Manual payments
- Running the Sick Pay Processor
- Change Payroll Information for existing Employees (Inputting Earnings and Deductions, Enrolling Employees on pensions, Adding/Amending bank details adding an Attachment of earnings Order)
- Creating a batch and selection of employees for variable pay data entry
- Pay data entry and verification (variable earnings and deductions)
- Exporting and Importing the PDE grid
- Committing the payroll
- Close the pay period
- Running the GL Costing interface

Objectives – upon completing this session, you will be able to correctly:

- Activate, calculate, commit and close a pay run
- Perform the post-calculation review
- Create and edit variable pay data grids
- Create and save a batch of employees to place in the grid
- Enter variable and fixed employee pay information
- Use the Sick Pay Processor
- Use the manual payments assistant
- Use the payslip reversal assistant
- Use the employee payroll input screens

Course Title ADP freedom Day to Day Payroll

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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ADP freedom System Administration

(Classroom based training)

Course overview

This course has been specifically created for system administrators of processing clients and provides the skills and knowledge necessary to make specific and required changes to ADP freedom to ensure smooth day to day running of the system. This is an advanced course that may not be taken as part of in contract days thus a charge will apply.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom Employee Lifecycle course
3. You have attended an ADP freedom Day to Day payroll course
4. You are proficient in using Microsoft Windows and are computer literate
5. You are able to use English to a working level

Topics covered

- Setting up new Business Units
- Setting up/Editing Job/Position
- Setting up/Editing Shift Patterns
- Changing the Enterprise lookups (Cost Centre, Business Locations, Company Vehicles, Leaving reasons, Absence reasons and Pay Rate Change Reason)
- Change of reporting and hierarchical structure
- Setting up and editing system reminders
- Setting up earnings and deductions
- Importing variable pay data using PDE grid template exports
- New user set-up and security

Objectives – upon completing this session, you will be able to correctly:

- Change or edit Business Unit, Job and Position details
- Edit and change the reporting and hierarchical structure
- Add or delete options in the enterprise lookups
- Set up and edit of Notifications/Reminders
- Set up and edit Earnings and Deductions
- Import / Export PDEs
- Create a new user profile and assign relevant security levels

Course Title ADP freedom System Administration
Course Duration 1 Day (10:00 – 16:30)
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom Report Writer

(Classroom based training)

Course overview

This course has been specifically created for ADP freedom clients and provides the skills and knowledge necessary to run, create and view useful reports. Delegates will have a choice of reports they wish to build during the course (including absence and payslip data) and will then use more examples to create several other reports.

Pre-requisites

Before attending this course, it is mandatory that:

4. You have read the course overview
5. You have attended an ADP freedom Employee Lifecycle course **or** an ADP freedom General Navigation virtual classroom training course
6. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Introduction to reporting in ADP freedom
- Running standard reports
- Adding report categories
- Creation of ad hoc reports
- Adding fields
- Formatting reports
- Headers and footers on reports
- Formulas on reports
- Sorting on reports
- Titles on reports
- Grouping on reports
- Filters on reports
- Parameters on reports
- Excel exports
- Mail merge extracts

Objectives – upon completing this session, you will be able to correctly:

- Run a standard report
- Create and run an Ad Hoc report
- Select employees using filters and Parameters
- Print and Export reports
- Run a mail merge extract
- Format the layout and design of your report

Course Title ADP freedom Report Writer

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom Training & Development

(Classroom based training)

Course overview

This course has been specifically created for ADP freedom clients who have purchased the employee development component and provides the skills and knowledge necessary to record and maintain employee development information.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level

Topics covered

- Maintaining the skills dictionary
- Maintaining an employee training record
- Creating the training catalogue
- Recording employee development needs
- Appraisals
This session will look at the appraisal process using ADP freedom; how you schedule appraisals and how you access the forms. It also looks at how you build and design the appraisal forms within ADP freedom
- Competency framework
If a company has a competency framework set up, an appraisal form can include a link to the competency framework. Specific competencies can be linked to the role through the skills profile
- Essential training
It is possible to set up training activities that are essential for an employee filling a specific role to attend
- Build skills profiles and searches
Creating profiles for business units, jobs, grades or positions that specify skills required in that area. It is also possible to create profiles for positions that have not yet been created in the company structure. You are then able to search for employees who have these skills
- Running standard training and development reports

Objectives – upon completing this session, you will be able to correctly:

- Add training (activities and needs) to an employee record
- Build appraisal forms
- Schedule appraisals
- Input appraisals
- Use, add and maintain the skills dictionary
- Use the training catalogue
- Use the competency framework
- Use skills profile

Course Title ADP freedom Training & Development
Course Duration 1 Day (10:00 – 16:30)
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Processing Clients Virtual Classroom Training (VCT) Courses

ADP freedom Company Set up

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who are either in the process of filling out implementation workbooks or who need to maintain the structure within the system.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have a working knowledge of your company's HR organisational structure
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Business Units
- Jobs
- Positions
- Shift Patterns
- Organisation charts

Objectives – upon completing this session, you will be able to correctly:

- Understand when the information is required
- Understand why the information is required
- Understand what needs to be entered onto the system

Course Title ADP freedom Company Setup VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom General Navigation

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but do need to know the basics around navigating the system and basic inputting.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using Microsoft Windows and are computer literate
3. You have tested the link into VCT sent to you by ADP after you book your place
4. You are able to use English to a working level

Topics covered

- What is ADP freedom
A brief introduction, and a little about the system and some of its terminology
- Logging into ADP freedom
- Home Page Navigation
How to navigate to the screens and employees you wish to view
- Basic screen navigation
The different types of fields and how to use them
- Inputting a New Starter
The basics to getting a new employee on to the system
- Logging Absence
- Running standard reports

Objectives – upon completing this session, you will be able to correctly:

- To understand what ADP freedom is and some of its capabilities
- To be able to successfully navigate through the system
- To enter a new starter on the system
- To find and enter absence information
- To run standard reports

Course Title ADP freedom General Navigation VCT
Course Duration 2 hours
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Managing Absence for Processing Clients

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but will be required to manage absence in the system.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom Employee Lifecycle course **or** an ADP freedom General Navigation virtual classroom training course
3. That you have a working knowledge of absence management
4. You are proficient in using Microsoft Windows and are computer literate
5. You are able to use English to a working level
6. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Introduction to the absence dashboard
A brief introduction to the screen and how it is laid out
- Recording a basic absence
- Modifying a previously recorded absence
How to make changes to existing absence records
- Recording sickness
This section looks at recording sickness using the absence dashboard and recording related medical certificates
- Accidents at work
Linking accidents at work to an absence record
- Recording medical certificates
- Inputting maternity information
Using the maternity assistant
- Viewing annual leave balances
- Standard absence reports
- Using the Sick Pay Processor
- Occupational sick pay
Forcing and withholding

Objectives – upon completing this session, you will be able to correctly:

- To navigate, enter information, and modify absences within ADP Freedom
- To enter medical certificates for absences
- To enter accidents and link them with absences
- To enter Maternity on ADP Freedom
- To navigate and run standard absence reports in ADP Freedom

Course Title Managing Absence in ADP freedom VCT
Course Duration 2 hours
For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Pay Data Entry for Processing Clients

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who may not need to attend a full day of classroom training, but will be required to either set up and / or run variable payroll data processes.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom Employee Lifecycle course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics Covered

- Set up of earnings and deductions
- Set up and modifying pay data entry grids
- Set up of pay data entry batches
- Adding employees to a batch
- Entering variable pay data on a PDE grid
- Verification of data
- Rectifying errors

Objectives – upon completing this session, you will be able to correctly:

- Create a new PDE Grid
- Create a new PDE Batch
- Enter variable pay into a PDE Grid
- Use the right click options in a grid
- Identify any errors in a Grid
- Perform Imports / Exports of PDE grids

Course Title Pay Data Entry VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom Payroll Processing

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom processing clients who may not need to attend a full day of classroom training, but will require the skills and knowledge necessary to run the payroll and perform common employee payroll tasks.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom Employee Lifecycle course **or** an ADP freedom General Navigation virtual classroom training course
3. You have a working knowledge of UK payroll legislation
4. You are proficient in using Microsoft Windows and are computer literate
5. You are able to use English to a working level
6. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Pay run management
- Pay cycle review
- Calculating the payroll
- Post payroll calculation review
- Payroll reporting (Pre and Post commit)
- Running the Sick Pay processor
- Running the back pay processor
- Committing the payroll
- Close the pay period
- Running the GL Costing interface

Objectives – upon completing this session, you will be able to correctly:

- Activate, calculate, commit and close a pay run
- Perform the post-calculation review
- Use the sick pay processor
- Use the back pay generator

Course Title ADP freedom – Payroll processing VCT

Course Duration 2 Hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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Ad Hoc Reports: Filters and Parameters

(Virtual classroom training)

Course overview

The purpose of this course is to give a more detailed account of certain elements from the Report Writer classroom course and expand on the delegates understanding of these elements. Delegates will create and run common examples of ad hoc reports (including pension contributions and headcount reports).

Pre-requisites

Before attending this course, it is mandatory that you:

1. Have read the course overview
2. Have attended a Report Writer classroom course
3. Are proficient in using Microsoft Windows and are computer literate
4. Have tested the link into VCT sent by ADP
5. Are able to use English to a working level

Topics Covered

- Creation of ad hoc reports
- Adding fields
- Sorting on reports
- Grouping on reports
- Filters on reports
- Parameters on reports

Objectives – upon completing this session, you will be able to correctly:

- Use filters and parameters to specify reporting data required
- Demonstrate the use of filters, parameters, groupings and summaries
- To be able to successfully create and run an ad hoc report

Course Title Ad hoc reports: Filters and Parameters

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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ADP freedom Time and Attendance Connectivity

(Virtual classroom training)

Course overview

This course has been specifically created for ADP freedom clients who have purchased and are utilising the time and attendance functionality.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom Employee Lifecycle course **or** ADP freedom General Navigation virtual classroom training course
3. That you have a working knowledge of time and attendance
4. You are proficient in using Microsoft Windows and are computer literate
5. You are able to use English to a working level
6. You have tested the link into VCT sent to you by ADP after you book your place

Topics covered

- Introduction to time and attendance
- Uploading files
- Accepting files into the payroll
- Uploading and viewing timecards
- Accepting timecards into the payroll

Objectives – upon completing this session, you will be able to correctly:

- To know about the ADP freedom Time & Attendance Connectivity Feature
- To successfully navigate through this feature on the system
- To upload an Interface File with timecards on the system
- To accept timecards into your Payrun

Course Title ADP freedom Time and Attendance Connectivity VCT

Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Setting up Benefits for Processing Clients

(Virtual classroom training)

Course overview

The purpose of this course is to understand how to set up benefits within ADP freedom and also to comprehend the set up of levels of coverage, costs / contributions and earnings / deductions.

This course has been specifically created for ADP freedom clients who have purchased and are utilising the Benefits functionality.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You have attended an ADP freedom for Managed course **or** an ADP freedom General Navigation virtual classroom training course
3. You are proficient in using Microsoft Windows and are computer literate
4. You are able to use English to a working level
5. You have tested the link into VCT sent to you by ADP after you book your place

Topics Covered

- Creating new benefits within ADP freedom
- Linking benefits to payroll earnings / deductions
- Benefit lookups
- Benefit coverage levels
- Benefit plans
- Allocating benefits and benefit plans to employees
- Benefit reporting

Objectives – upon completing this session, you will be able to correctly:

- Create a new benefit
- Edit existing benefit details
- Link benefits to the payroll
- Create a benefit plan
- Assign benefits and plans to employees
- Identify relevant benefit reports

Course Title Setting up Benefits in ADP freedom
Course Duration 2 hours

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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ADP freedom Video Training Aids (VTAs)

Training VTAs are supplementary to training courses.

Each VTA is a short video of a specific functionality. Video training aids do not replace training sessions but can act as excellent memory joggers. Also once you have attended the basic courses, demos may be available to help you work through topics that were covered on the training courses. When new screens and new functionality are introduced, you may find that there is a VTA available to aid your understanding.

Bespoke VTAs (created for topics specifically chosen by you) are also available for a fee.

Video training aids currently available

(Professional users)

- ADP freedom Navigation
- Entering Information with Pay Data Entry (PDE) Grids
- ADP freedom End of Year
- Running standard reports in ADP freedom VTA
- Creating filters in an Ad-Hoc report
- Adding Parameters to Ad-Hoc Reports
- How to upload Company Vehicles and assign them to Employees
- Recording a disciplinary offence and the resulting actions
- Mail Merge Extract

Video training aids currently being updated

(Professional users)

- Logging an Absence for a flexible worker
- Logging an Absence using the Absence Dashboard
- Modifying an Absence Entry
- Sick Pay Processor
- ADP freedom Absence Dashboard Familiarisation

Please note that there is no cost attached to the use of Video Training Aids.



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Employee self service Video training aids

- Introduction to ADP freedom employee self service (including navigation)
- How to record Absences with Shift Override
- How to request Absence without Shift Override
- How to update passports and permits
- How to add a Grievance
- How to update your teams Company Vehicles
- How to record an accident
- How to update your team's medical information
- How to update your communications
- How to Approve Timesheets
- How to Submit your Timesheets
- How to use team TES (Team Time and Expenses)

Please note that there is no cost attached to the use of video training aids.



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Payroll Fundamentals Training Courses

Payroll Fundamentals – Payroll Basics

(Classroom based training)

Course overview

The purpose of this course is to introduce delegates to some of the aspects of basic information regarding legislation and the role an administrator has to play when processing a payroll.

This course will give delegates the basic knowledge and understanding enabling them to develop the processes needed to work with any payroll system.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using a calculator
3. You are able to use English to a working level

Topics Covered

- HMRC documentation such as the purpose of the following forms;
 - P45
 - P46
 - P38 (S)
 - P6, P9
 - P11d
- Different payroll timetables
- Explanations of payments and deductions from employees
- Standard pro ration for starters / leavers

Objectives

- Recognise elements of the Payroll Cycle and their process
- Identify key documentation used in conjunction with PAYE and NIC
- Distinguish variable and fixed data
- Explain the purpose of the Tax forms covered with a new and previous employer

Please note this course is run from our Chertsey training centre.

Course Title Payroll Fundamentals – Payroll Basics
Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Payroll Fundamentals – Tax and NIC

(Classroom based training)

Course overview

The purpose of this Payroll Fundamentals course is to provide a basic understanding of how income tax and national insurance contributions are calculated and deducted from employee's pay.

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using a calculator
3. You understand the purpose and impact of Revenue documentation (P45, P46, etc)
4. You understand the basic responsibilities of the payroll department
5. You are able to use English to a working level

Topics Covered

- An explanation of tax codes and what they mean
- How income tax is calculated
- Tax rates and limits
- Possible reasons for tax fluctuations
- National insurance letters and rates
- How employees and employers national insurance is calculated

Objectives

- Accurately calculate income tax
- Identify key differences between YTD and M1 calculations
- Accurately calculate employee and employer NIC
- All using correct NI letters and tax codes

Please note this course is run from our Chertsey training centre.

Course Title Payroll Fundamentals – Tax & NI

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk
or contact the training team on 01932 597 346



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Payroll Fundamentals – Statutory Payments

(Classroom based training)

Course overview

The purpose of this course is to provide a basic understanding of how to calculate an employee's entitlement to statutory payments such as Statutory Sick Pay (SSP), Statutory Maternity Pay (SMP), Statutory Paternity (SPP), and Statutory Adoption Pay (SAP).

Pre-requisites

Before attending this course, it is mandatory that:

1. You have read the course overview
2. You are proficient in using a calculator
3. You understand the purpose and impact of Revenue documentation (P45, P46, etc)
4. You understand the basic responsibilities of the payroll department
5. You are able to use English to a working level

Topics Covered

The following applies to SSP (sick pay), SMP (maternity pay), SPP (paternity pay) and SAP (adoption pay)

- Explanations of statutory payments and their purpose
- Entitlements to statutory payments
- Rates and calculations of the above statutory payments

Objectives

- Specify required dates / information required when calculating statutory payments
- Identify an employee's entitlement to qualify for statutory payments
- To Calculate statutory payments using given data

Please note this course is run from our Chertsey training centre.

Course Title Payroll Fundamentals – Statutory Payments

Course Duration 1 Day (10:00 – 16:30)

For Further details and / or to book your place on this course please email Client.training@adp-es.co.uk or contact the training team on 01932 597 346



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On-site Client Training Requirements

Clients shall be required to provide the ADP client training department with the contact name of a person who will be available to the trainer to trouble shoot before, during and following the training. This will aid the smooth effective running of training.

The trainer will require a meeting with the on-site contact on the set up day to go through all arrangements. The on-site contact will also need to be contactable throughout training days to assist the client trainer should there be any arising challenges.

Preparation

Client requirements

- To provide / identify on-site contact
- On-site contact to liaise with ADP client training department to arrange a set up day
- Identify an appropriate training environment, fulfilling the following requirements:
 - Suitable size for No. of delegates (maximum eight) and the trainer
 - Eight delegate PCs
 - One trainer PC
 - Screen
 - Projector (plus relevant leads to allow trainer PC to project on to screen)
 - Ability to manage room temperature (ideally no extreme temperatures)
- It is desirable for there to be a breakout area in which delegates are able to take their breaks
- Refreshments on site (tea / coffee making facilities)

Set up day

Trainer's requirements

- Access to the training environment and all PCs that will be used as part of the training
- Administrator access to all training PCs. Alternatively the client can provide ADP Client Training with a direct contact within their PC Support team who will be able to load all relevant applications prior to the set up day
- To test the system on all nine PCs
- Run through the course timetables with the on-site contact so that all refreshments can be booked and both parties are aware of all timings and expectations

Cancellations

- All on-site course cancellations must be made through the client training department either by email Client.training@adp-es.co.uk or by contacting the Training Team on 01932 597 346. Cancellations must be notified to ADP at least 24 hours prior to the day of delivery.
- Delegates are requested to arrive 15 minutes prior to the course commencing in order to maintain the quality and timings of courses. ADP client training reserves the right to refuse admission to the course once it has commenced



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On-site training days

- Courses will be scheduled to run from 10am (prompt) through until 4.30pm. All course delegates are expected to arrive at the training break out area at least 15 minutes prior to the start of the course
- The trainer reserves the right to refuse admission to the course once it has commenced should this admission cause disruption
- The trainer will arrive approximately half hour prior to the start of a course; the trainer will expect to be met by the on-site contact. This is the point at which any last minute issues should be addressed
- The trainer will provide all course materials
- The on-site contact must be contactable throughout the day, and will be expected to liaise with PC support should there be any technical issues with the client site equipment or facilities
- Any issues arising around ADP applications will be dealt with by the trainer
- Please note that all delegates will be required to attend the full duration of the training course. Should delegates need to be excused for any length of time this should be discussed directly with the trainer who will make a judgement as to whether the course will still be useful to the delegate. The trainer reserves the right to ask that a delegate removes themselves from the course should they not be able to attend the whole course
- Both the trainer and the on-site contact should be available at the end of the course to exchange feedback at that time



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