This schedule outlines the implementation and training of your WorkMax Platform. Share and discuss this document along with the *"Workforce Adoption Guide"* with the key members of your leadership team and make a plan for your WorkMax training and rollout. Doing so will significantly increase your chances for success!

Utilizing the WorkMax platform to its fullest will save you time and money in your payroll process and give you the competitive edge to lead in your industry.

This outline is not exact. Timelines are estimates, but many calls may be completed quicker than expected depending on complexities.

Call 1: Kick Off Meeting — 1 Hour

Suggested members for call:*	**Homework:**
• Primary WorkMax Contact (customer side - often the administrator of WorkMax) • Payroll Manager • HR Manager • Operations Manager • IT • Senior Management	Log into account, review training materials, and collect necessary integration information.

* We understand that not all companies have the suggested member positions in their organization. That is okay, as these are just recommendations.

Call 1 Agenda:

Discuss Payroll Settings

- Overtime Rules
- If Multiple companies are involved, single or multiple WorkMax account needs
- Unions
- Certified/Prevailing wage Jobs

Discuss Workflow

- Time collection by employee or supervisor
- Real time vs. Digital time
- Auto lunch deduction or employee clock out
- Possible certified class selection
- Shift rules
- Time rounding
- Time approval process

Review the onboarding process and expectations. Explain information needed for integration.

Call 2: Integration — 2 Hours

Suggested members for call:	Homework:
• Primary WorkMax Contact • Payroll Manager • HR Manager • IT	Review data in your WorkMax account to make sure you show the correct employees, jobs, and cost codes.

Call 2 Agenda:

Integration Setup

- Install ConnectMax
- Establish connection with accounting via ODBC, SQL or API depending on the accounting system
- Map database, confirm filters will import correct data
- Import data into WorkMax
- Setup scheduled sync if applicable

Call 3: Admin Training and Setup — 2 Hours

Suggested members for call:	Homework:
• Primary WorkMax Contact • Payroll Personnel • IT (may want to join for device setup, typically done at the end of the call)	Finish assigning employees to their correct User Roles. Assign employee/job pay groups, employee groups, and Spanish language, if applicable. Test mobile device by creating time records for the next training meeting.

Call 3 Agenda:

- Review account info and licenses
- Setup Pay Group(s) including
    - Pay period
    - Time rounding
    - Overtime
    - Pay codes
    - Shift rules
    - Auto lunch
- Set geo fence, time alert, and clock out disclaimer
- Setup custom lists if applicable
- Setup job permissions/profile(s)
- Setup Employee Groups if applicable
- Setup User Roles
- Training on how to assign User Roles, Pay Groups, Employee

Groups, and Permissions as needed, depending on workflow
- Review job & cost code/task menus
- Training on setting up mobile app
- Brief training on mobile time creation

Call 4: Time Editor Training — 2 Hours

Suggested members for call:	Homework:
• Primary WorkMax Contact • Payroll Personnel • Project Manager/Coordinator (if they are involved with reviewing/editing/signing off time records)	Testing phase. Have 3-5 employees set up and start tracking their time for 1 week for testing purposes.

Call 4 Agenda:

Training Time Editor:
- Review records
- Edit records
- Sign off records
- Filter time records
- Manually create records

Payroll Training:
- Batch records
- Process records
- Close records
- Run reports

Call 5: Test Export — 1 Hour

Suggested members for call:	Homework:
• Primary WorkMax Contact • Payroll Personnel	Have initial test employees track their time for payroll purposes for 1 week.

Call 5 Agenda:

- Review processing time records
- Setup export template in ConnectMax.
- Setup Import template in accounting as needed.
- Export/Import data into accounting
- Delete test records if needed

Call 6: Payroll Export	30 Min
Suggested members for call: • Primary WorkMax Contact • Payroll Personnel • HR Manager • Operations Manager • IT • Senior Management	**Homework:** Continue rollout to additional employees.

Call 6 Agenda:

- Review process and managing time records
- Export/Import time into accounting

The following sections only applies if you have purchased or plan on purchasing licenses in our FORMS or ASSETS modules.

Depending on workflow, these additional trainings may be done during initial implementation or following payroll.

WorkMax FORMS Training	1 Hour
Suggested members for call: • Primary WorkMax contact • Person(s) responsible for building and managing forms	**Homework:** Continue to build any other form needed for your company.

FORMS Training Agenda:

- Intro on how to build forms. Ideally, if you have an existing form you would like to be used within WorkMax, your trainer will use that as a template and build that form in WorkMax together
- How to apply forms to permissions
- Setup Forms User Roles and assign to employees
- How to fill out forms on mobile

WorkMax ASSETS Training — 1 Hour

Suggested members for call:	Homework:
• Primary WorkMax contact • Person(s) responsible for managing equipment	Have employees/individuals start testing and using assets according to workflow.

ASSETS Training Agenda:

- Manage inventory
- Track usage
- Assign equipment
- Apply permissions
- Setup asset User Roles and assign to employees
- Track usage and assignment on mobile

WorkMax Insight Training — 1 Hour

Suggested members for call:	Homework:
• Primary WorkMax contact • Person(s) responsible for managing budgets/estimates	Confirm you have correct budget data. Have employees/individuals start testing and using Insight according to workflow.

Insight Training Agenda:

- Productivity Dashboard Overview
- Individual Job Budget Review including forecasting
- Basic review on Custom Reports
- Review of Schedule Reports