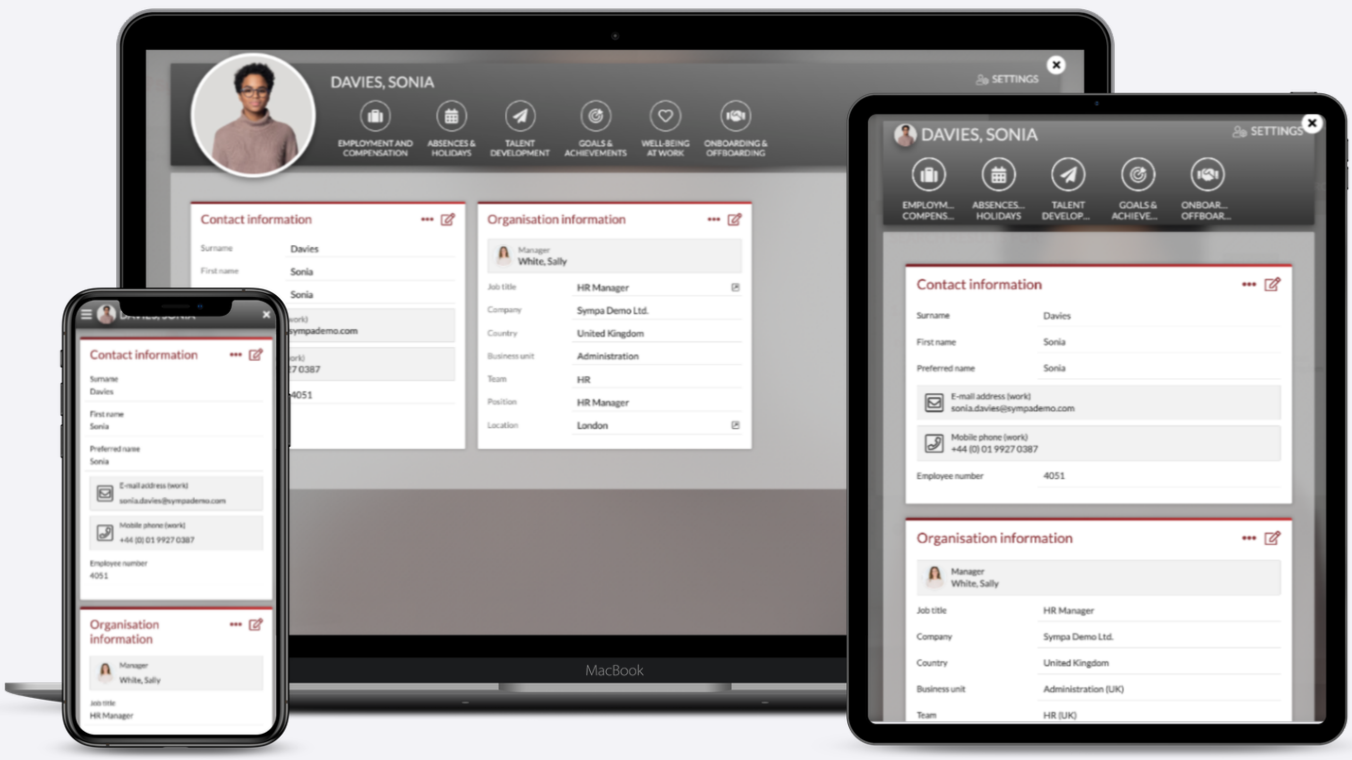
Sympa

SYMPA ONBOARDING DESCRIPTION

Advanced onboarding



Contents

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1 Introduction

The purpose of this document is describing the delivery process and method for the implementation of the Sympa system. The document describes the different stages of the onboarding project, as well as the responsibilities of Sympa and the customer.

2 Start-up

2.1 Sympa GO -starting package

When the contract is signed, Sympa's project manager will send the login details for the Sympa GO -starting package and for the project management tool Freedcamp. The starting package includes instructions and tasks for the customer to prepare for the implementation project and roll out. Tasks includes for example mapping the reporting needs for the system, planning the user roles, exploring the Sympa Best Practices -processes and evaluating the project risks. In the starting package the customer can also explore and orientate the tasks that will be appointed to the customer later on in the project. The purpose of the starting package is to ensure an efficient and succesfull project with sufficient and comprehensive preparation. Returning the tasks in the starting package will be carried out by using the project management tool Freedcamp.

2.2 Freedcamp project management tool

The Freedcamp project management tool is used during the onboarding project. Freedcamp is used for all project related communications, maintaining the task lists and documents, carrying out tasks and approving the delivered content. Sympa's project manager is responsible for updating the task list and assigning and scheduling the tasks. The customer's responsibility is to execute the tasks assigned to them according to the given schedule. Discussion related to the tasks is done in the project tool. All material containing sensitive employee data will be delivered to Sympa using the customer's Sympa environment instead of the project tool.

2.3 Kick-off meeting

The main purpose of the kick-off meeting is to agree on the schedule of the implementation project, specify the content to be implemented in detail, agree on common ground rules and on possible integrations with other systems.

Sympa's project manager is responsible for arranging the kick-off meeting together with the customer's project manager. Sympa's project manager provides the customer with preparatory material before the kick-off meeting and prepares the agenda and material for the kick-off meeting. In addition to Sympa's and the customer's project managers, the customer's project team and, if necessary, steering group members should attend the kick-off meeting.

During the kick-off meeting, Sympa as a company and the Sympa system will be briefly presented to the project team. The customer's project manager presents the company they represent and any organisational characteristics relevant to the project, such as the specifics of the organisational structure and operations concerning HR. Sympa's project manager presents the preliminary project plan which will be reviewed and specified further. Based on what is agreed in the kick-off meeting, Sympa's project manager updates the project plan and submits it to the steering group for approval.

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2.4 The Sympa environment

A dedicated Sympa environment will be established for the customer, into which Sympa's Best Practice content will be copied as agreed. The customer will be given instructions for defining the visual appearance. Following the instructions, the customer can submit the desired background image and logo to Sympa.

Test user accounts to the Sympa environment will be created for the customer's project team. Members of the customer's project team will use these test accounts to log into the system to review and comment on the created content and processes and the changes made. If necessary, several test accounts will be created to match different roles, such as employee, manager and HR user. Sympa is responsible for defining user privileges for the user accounts during the project.

3 Project plan

Sympa's project manager is responsible for creating and maintaining a project plan for the implementation of the Sympa system. The steering group approves the project plan and any changes to the plan. Sympa's project manager submits the preliminary project plan to the customer's project manager before the kick-off meeting for the project. The updated project plan will be delivered to the steering group for approval after the kick-off meeting. The project plan approved by the steering group is sent to the whole project team for information. The tasks of the steering group can also be handled by the project team if this is specifically agreed upon in the project plan.

The following information will be entered in the Sympa onboarding project plan:

- The project's starting point and objectives
- Project content and limits
- The project's performance indicators and acceptance criteria
- Project stages and schedules
- Project organisation, roles and responsibilities
- Communication principles for the project
- The project's risk assessment
- Project documentation
- Project steering
- Project change management

4 The workshop model

Sympa's project manager is responsible for arranging workshops together with the customer's project manager.

The workshop model consists of three stages:

1. Preparing for the workshop
2. The workshop
3. Tasks following the workshop

During the preparation stage, the customer views the Sympa content agreed to be processed during the next workshop using the test user accounts, reviews their own related processes and submits their comments and desired changes to Sympa's project manager according to the schedule. Sympa's project manager makes changes to the system based on the customer's comments.

At the beginning of the workshop, changes made after the previous workshop are discussed, as well as any observations made during the customer's testing, and the delivered content is approved. After this, the content agreed upon for the workshop and the customer's processes is reviewed. During the workshop, changes can be made directly to the Sympa system. Changes and modifications that cannot be implemented during the workshop are recorded in a task list to be carried out after the workshop. At the end of the workshop, Sympa content agreed to be processed during the next workshop will be presented and the customer's processes related to it will be reviewed.

After the workshop, Sympa's project manager submits an updated task list. Both the customer's and Sympa's project teams carry out the tasks according to the task list, after which the customer tests the edited content and processes using the test accounts and prepares for the next workshop.

4.1 Task list

The task list includes all significant tasks related to the Sympa HR project assigned to the customer and/or to Sympa, the persons responsible for the tasks, the schedule for the tasks and the approved content. Sympa's project manager is responsible for maintaining the task list in the Freedcamp project management tool. The task list is reviewed during the workshops and an updated task list is always submitted to the customer after a workshop. The task list is used to make sure that all significant tasks for the project are completed, the overall project schedule is kept as agreed and the delivered content is approved.

The customer's and Sympa's project managers are responsible for carrying out tasks assigned to their organisations as scheduled. If a task cannot be completed within the schedule, the project manager shall inform the other party's project manager of this in good time. A new deadline for delayed tasks will be sought to avoid any impact on the overall project schedule. If the tasks cannot be accomplished according to the schedule, Sympa's project manager will take the need for changing the overall project schedule to the steering group for processing.

The customer must take into account that the task list for the Sympa HR project does not include any internal tasks of the customer's organisation. These include, for instance, tasks agreed within internal communication, documentation management and the customer's project team. We recommend that the customer maintains their own task list or an internal project for the purpose of organising the organisation's internal matters.

4.2 Modifying the Sympa HR environment

Sympa's project manager is responsible for modifying the Sympa HR environment during the project. The number of modifications of the environment included in the project has been agreed upon in the contract. Content is primarily edited in workshops and after the workshops, according to the task list. The customer uses project's test accounts for reviewing and commenting on the Sympa HR content and the changes made. Sympa's project manager can assign tasks related to editing the content to Sympa's project team. The customer owns the content of the Sympa HR environment.

After the customer has approved the content delivered within the project, the responsibility for modifying the Sympa HR environment transfers to the customer's admin users, unless otherwise agreed.

4.3 Defining user privileges

User privileges are defined during workshops in a user privileges document. The user privileges document defines the permissions for each user role during production use. Sympa's project manager is responsible for the user privileges document and for keeping it updated during the implementation project. After the implementation project, the ownership of the user privileges document and the responsibility for updating it will transfer to the customer.

The implementation of user privileges in the system has been described in section 8 of this document, "Implementation of user privileges".

5 Acceptance testing

An implementation project always includes the customer's acceptance testing. Acceptance testing ensures that the content implemented always conforms to the agreement and that processes in the system work in the defined manner. The customer tests the content during the project using the test accounts, but the actual acceptance testing takes place after all the agreed content has been defined and approved in the workshops. The customer is responsible for the acceptance testing and defines how the testing should be carried out. Sympa's project manager submits a testing recommendation to the customer that includes the most common processes and functions defined in Sympa HR, as well as a recommendation on how these should be tested.

If the implementation project includes integrations with other systems, the acceptance testing of the integration is usually performed at the same time as the system acceptance testing.

5.1 Test group

The acceptance testing will be carried out using a test group. The customer selects the test group from its own organisation. People from different user roles should be selected for the test group; at least one employee, one manager and one or more HR users. The customer sets up the test users in the system and enters the necessary data for them. Sympa's project manager implements user privileges for the test group according to the approved user privileges definition document.

5.2 Technical testing

Sympa's project manager carries out technical testing of the customer's Sympa HR environment. Technical testing includes ensuring the technical operability of the implemented functions. A member of Sympa's project team (other than the project manager) carries out a review of the customer environment and ensures that the environment is ready for the customer's acceptance testing.

5.3 Approval of the implementation

The customer's project manager gathers details of any defects in the implementation found during the acceptance testing and reports them to Sympa's project manager. Corrections are implemented in the system by Sympa, and the customer inspects the end result. If necessary, the customer arranges a new acceptance testing. After the acceptance testing, the project managers of the customer and Sympa propose the approval of the implementation to the steering group. The steering group is responsible for the final approval of the implementation.

6 Integrations with other systems

The Sympa HR Implementation project can include integrations with other systems, depending on the customer needs. Typical systems which Sympa HR is integrated with are payroll, travel management, IDM and work force planning systems. The methods for implementation are file transfer through a dedicated server, retrieving data directly from customisable Sympa HR REST API or direct API-to-API integration. In both cases the target system is responsible of importing the data. It is also possible to import data to Sympa HR with a file transfer in CSV format.

The integration project can be fulfilled with a standardised and fixed price Click! solution, which also considers customer specific requirements. We have Sympa HR Click! integrations available for the most common systems, with more Sympa HR Click! integration solutions continuously in development. Alternatively, the integration can be set up as a customised solution, taking into account the customer and target system requirements.

The integration project and integrations are fulfilled separately to each target system. The customer is responsible for the integration project management and collaboration with the third party vendors. Reading the data into the third party system is always the third party vendor's responsibility and therefore, the project requires resources and actions also from the vendor of the third party system. Phases and responsibilities of the integration project are the following:

6.1 Specification

The integration specification is made in collaboration with the customer, Sympa and the third party system vendor. The project starts with an integration workshop, which is organized by the customer. Sympa is responsible for creating and maintaining the integration specification document. The customer knows their processes best and therefore is responsible for defining which data is transferred in the integration. Sympa and the target system supplier are responsible for the correct transfer method and will consult the customer if needed.

6.2 Implementation

The integration specification document is approved by the customer, Sympa and the third party vendor. When the specification document is approved, Sympa will build the integration based on the agreed specification. The third party system vendor is responsible for the setup according to the agreed specification on their side. The customer is responsible for the third party vendor's schedule in accordance to the Sympa HR Implementatin project schedule.

6.3 Technical testing

Sympa and the third party system vendor are responsible for the technical testing of the integration on their side. The testing is generally carried out with test persons. The customer is responsible for adding sufficient test data for the test persons in Sympa HR. Creating the test data/files to be imported to Sympa HR is customers and third party vendors responsibility.

6.4 Process testing

The customer and third party system supplier are responsible for the process testing. When the technical setup is completed, the integration can be moved to the production environment. When in production, the customer can use Sympa HR and the target system to test the integration and process as a whole. Process testing can be carried out with complete and real data or with a pilot employee or group. Possible issues are corrected by Sympa and the third party vendor on their side and testing is continued until the integration is approved by the customer.

6.5 Approval

The customer is responsible for approving the integrations built according to the approved specification document. Any adjustments to the integration which are outside the approved specification document are separately priced. The integrations need to be approved before actual employee data is transferred through the integration. Sympa is responsible for updating the integration specification document when the integrations are changed as per customer's request.

7 Data import

Data import means a one-time import of personal data into the Sympa HR system. The import is implemented by Sympa as a transfer of the data from an Excel sheet into the system.

7.1 Data import template and filling in the data

Sympa's project manager provides the customer with a data import template and instructions for filling in the data to be imported after the implementation has been approved. The data import template is created to match the structure of the customer's environment. The customer is responsible for filling in the data in the data import template within the agreed schedule. The filled data import material includes sensitive personal information, and because of this, the customer's own Sympa HR environment is used for transferring it from the customer to Sympa in a secure manner.

7.2 Implementing the data import

Sympa's project team verifies the structural validity of the material submitted by the customer in Sympa's own test environment. Structural validity means that the menu values and data formats (dates, number formats, etc.) submitted in the material are correct with reference to the customer's Sympa HR environment. If there is anything that needs correcting in the material, the customer will be asked to provide a new set of materials. Sympa is not responsible for incorrect data content in the material provided by the customer.

Following a successful test run with the data import material, Sympa's project team will carry out the actual data import into the customer's environment within the agreed schedule. Sympa's project team verifies the success of the data import with the help of log information and spot checks. The customer inspects the success of the data import through reporting and spot checks. The customer approves the implemented data import, after which the ownership of the Sympa HR environment transfers to the customer.

8 Implementation of user privileges

Sympa's project manager is responsible for implementing the user privileges. The user privileges are implemented in the mass transfer phase based on a user privileges document approved by the steering group.

9 Training

The user training included in the agreement will be implemented before the go live. One of the objectives of the workshop model is that members of the project team learn to use the system and the processes built into it during the implementation project and will be able to independently deploy the system to the end users.

The customer is responsible for organising potential training events in cooperation with Sympa's project manager. The trainings take place in the customer's own Sympa HR environment, using separate training user accounts. The customer is responsible for creating training user accounts in the system. Sympa is responsible for implementing the user privileges of the training user accounts.

The customer can be trained to be a system administrator for Sympa HR. The appropriate timing for the system administrator training is in the closing phase of the project, so the customer can start to adjust the system and create new content right after the project has been closed.

10 Go live

The steering group is responsible for the final approval of the implementation and the go live for the production use.

Switching to production use means, in practice, the delivery of login information for the Sympa HR system to end users. The customer is responsible for delivering the login information, but if the login information is submitted to all personnel at one time in a group e-mail, Sympa can take care of sending the login information together with a cover letter provided by the customer. If the customer uses the single sign-on functionality, the customer is responsible for providing the end users with the sign-on link.

11 Project closure

Sympa's project manager creates a final report for the project and proposes closing the project to the steering group. The steering group inspects the end result of the project, whether the objectives have been reached and whether all tasks set for the project have been completed, and closes the project.

11.1 Hand over meeting

Sympa's project manager arranges a hand over meeting for the project. From Sympa, the project manager and account manager responsible for the customer account will participate in the hand over meeting. During the hand over meeting, the final report for the project will be reviewed, the success of the project will be assessed and feedback will be collected. At the end of the hand over meeting, the customer will be transferred to continuous service and follow-up actions are agreed.

After the hand over meeting the project space in the Freedcamp project management tool is closed and a separate feedback survey will be sent to the customer's project team.

12 Responsibilities and roles (RACI)

The following table describes the different stages of the delivery project and the related responsibilities and roles.

R = Responsible

A = Accountable

C = Consulted

I = Informed

Task	Sympa's project manager	Sympa's project team	The customer's project manager	The customer's project team	Steering group
1. Sympa HR Go! - starting package	A / C		R	I	
2. Project management tool Freedcamp	A / R / C	I	R	I	

3. Project plan	R / C	I	C	I	A / R
4. Setting up the Sympa HR environment	A / R		I	I	
5. Kick-off meeting	A / R		R	R	I
6. Setting up project test accounts in the system	A / R		I	I	
7. Workshops	A / R		R	R	
8. Maintaining the task list	A / R	I	C / I	I	I
9. Returning tasks assigned to the customer	C / I		A / R	R	
10. Implementing changes in the system	R / C	R	A / I	I	
11. Defining user privilege levels	C / I		A / R	R	
12. Selecting the test group	C / I		A / R	R	
13. Technical testing of the system	A / R		I		
14. Setting up test users	C		A / R	R	
15. Implementing user privileges for the test users	A / R		I	I	
16. Testing the content	C / I		A / R	R	
17. Approval of the delivered content	I		R	I	A / R
18. Integration specification	R / C	I	R / A	Third party vendor R / C	
19. Integration implementation	R / A	R	R / I	Third party vendor R / A	
20. Integration tecinical testing	R / A	R	I	Third party vendor R / A	

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21. Integrations process testing	I / C		R / A	Third party vendor I / C	
22. Integration approval	R / C		R / C	Third party vendor R / C	
23. Creating and submitting a data import template	A / R		I	I	
24. Filling in and returning the data import template	C / I		A / R	R	
25. Implementing the data import	A / R		I	I	
26. Implementation of user privileges	R		I	I	A
27. Training for HR users	R		A / C / I	I	
28. Training for end users	C		A / R	R	
29. Starting the production use of the system	C / I		C / I	I	A / R
30. Providing login information to the users	R		R / A / I	I	
31. Final report	R		I	I	A
32. Project closure	R		R	I	A / R
33. Hand over meeting	A / R		R	I	I
34. Transfer to continuous service	A / R		I		I