

## SCOPE

### Project Scope Overview

Workforce Insight has been asked to provide Implementation services for the RFP for Beaufort County Schools

### General Scope

#### EMPLOYEE GROUPS IN SCOPE:

- Geographical Locations included – US
- # of Sites/locations – One (1)
- # of Employees – 1500-2000
- # of Managers – 80

#### WORKFORCE MANAGEMENT SOLUTION AND MODULES INCLUDED:

The following WorkForce Software Modules are in scope:

- Time & Attendance
- Absence Compliance Tracker

The following Services are in scope:

- Functional
- Project Management

#### DEPLOYMENT GROUPS:

- # Deployment Groups – One (1)

#### SERVER / WFS ENVIRONMENT:

- Environment to be hosted by Workforce Software (SaaS)

## Detailed Scope of Services

## FUNCTIONAL

Implementation of the following WorkForce Software configuration items and their respective quantity, this includes all building blocks necessary to meet the functional requirements of the business. A Product Design Document will be created, reviewed and approved as part of the assessment phase of the project. All requirements will be configured using WorkForce Software best practices. Once approved by the Customer, and deviation or addition to requirements may constitute a change order to the project based on increased effort and timeline.

FUNCTIONAL SCOPE DETAILS		
CONFIGURATION ITEM:	IN SCOPE:	NOTES:
Employee Groups (Policy Profiles):	5	Base Xcelerate Package
Time & Attendance Standard User Roles	Yes	
Advanced Scheduler Standard User Roles	Yes	
Absence Compliance Tracker Standard User Roles	Yes	
Wall Mounted Clock Configuration Policy:	2	
Web Clock Configuration:	One Per Policy Profile	
Mobile Configuration (Employee):	Yes	Xcelerate Standard
Mobile Configuration (Manager):	Yes	Xcelerate Standard
Email Notifications:	15	
Exception Messages:	See Notes	Xcelerate Standard + 10 Extensions
Accrual Banks:	4	2 Base + 2 Extensions
Calculated Accruals or Pay-outs:	See Notes	Xcelerate Standard + 2 Extensions
Timesheet Layouts (Exempt/Non-Exempt/Other):	One (1) per Policy Profile	
<b>Basic Scheduler:</b>		
Schedule Templates:	50	
Approval Page Layouts:	One (1) per Policy Profile	
Overtime Premiums:	See Notes	Xcelerate Standard + 5 Custom
Shift Differentials:	See Notes	Xcelerate Standard + 2 Extension
Rounding Policy:	2	
Activity Tracking Fields:	2	Xcelerate Standard
Pay Codes:	Standard Xcelerate and 15 Extensions	<b>Standard Exempt Pay Codes:</b> <ul style="list-style-type: none"> <li>• Bereavement</li> <li>• Discretionary Bonus</li> <li>• Nondiscretionary Bonus</li> <li>• Holiday</li> <li>• Jury</li> <li>• Leave of Absence</li> <li>• Regular</li> <li>• Regular Adjustment</li> <li>• Scheduled Hours</li> <li>• Scheduled Times</li> <li>• Sick Leave</li> <li>• Sick Adjustment</li> <li>• Sick Payout</li> <li>• Unpaid</li> <li>• Vacation</li> <li>• Vacation Adjustment</li> </ul>

FUNCTIONAL SCOPE DETAILS		
		<ul style="list-style-type: none"> <li>• Vacation Payout</li> <li>• Work</li> </ul> <p><b>Standard Non-Exempt Pay Codes:</b></p> <ul style="list-style-type: none"> <li>• Bereavement</li> <li>• Discretionary Bonus</li> <li>• Nondiscretionary Bonus</li> <li>• Clock Time</li> <li>• Doubletime</li> <li>• Doubletime Adjustment</li> <li>• FLSA Adjustment</li> <li>• Holiday</li> <li>• Holiday Premium</li> <li>• Holiday Worked</li> <li>• Jury</li> <li>• Leave of Absence</li> <li>• Meal Break</li> <li>• Meal Penalty</li> <li>• Meal Penalty Adjustment</li> <li>• Meal Premium</li> <li>• Meal Premium Adjustment</li> <li>• Overtime</li> <li>• Overtime Adjustment</li> <li>• Regular</li> <li>• Regular Adjustment</li> <li>• Reporting Time</li> <li>• Scheduled Times</li> <li>• Scheduled Hours</li> <li>• Scheduled Meal Break</li> <li>• Sick</li> <li>• Sick Adjustment</li> <li>• Sick Payout</li> <li>• Sunday Premium</li> <li>• Training</li> <li>• Unpaid</li> <li>• Vacation</li> <li>• Vacation Adjustment</li> <li>• Vacation Payout</li> </ul>
Holiday Calendars:	5	
<b>Reports:</b>		
Standard Reports:	All Standard	Standard ACT and T&A reports
KPI Queries	Standard	2 customer specific reports for KPI reporting.
Custom Reports:	2	
<b>ACT:</b>		
Standard Leaves & Workflows	Yes	

**TECHNICAL**

Implementation of the following interfaces to meet the technical requirements of the business. An interface design document will be created, reviewed and approved as part of the assessment phase of the project. All requirements will be configured using WorkForce Software best practices and it's assumed that files will be exported and imported using a designated flat file format. This format will be provided to the Customer and it will be their responsibility to ensure that ancillary systems meet these requirements.

TECHNICAL SCOPE DETAILS:		
CONFIGURATION ITEM:	IN SCOPE:	NOTES:
Employee Import (CSV-Based)	Y	
SuccessFactors Employee Import	Y	
Pay Rate Import	Y	
Activity Tracking Import	Y	
Bank Balance Import	Y	
Time Entry Import	Y	
Schedule Import	Y	
Schedule Template Import	Y	
Generic Payroll Export	Y	
Importing Employees Photos	Y	
SuccessFactors Employee Central Payroll Export	Y	
SSO	Y	
ACT Work History Import	Y	
ACT Leave Usage Import	Y	
ACT Case Import	Y	

The following are deliverables for these services within the project:

- Interface Design Document

## PROJECT MANAGEMENT

Project Management is one of the core elements for success in a service-oriented project. Workforce Insight's Project Manager will work with the Customer's Executive Committee, Project Manager and Project Team to assess and formulate the optimal Project Process and documents to support the assessment effort. This is conducted through a series of workshops and reviews to cover the following:

### SERVICES DELIVERED:

- Project Plan
  - ▶ Milestones & Deliverables
  - ▶ Assigned resources for WFI and Customer
- Project Timeline
  - ▶ Detailed Scheduling with Deadlines for WFI and Customer
- Collaboration with assigned Customer Project manager to jointly create a Project Plan for the delivery of services. It will be the responsibility of the Customer Executive Sponsor to review and approve the Project Plan.
- WFI will define assumptions, constraints and dependencies that affect the project plan and schedule by working with Customer Project Manager
- WFI will define toll gate criteria for the entry/exit to each milestone
- Provide a communication plan
- Management and assignment of WFI resources for the lifecycle of the project
- Weekly Status Reports to be delivered prior to the Weekly Status meeting
- Jointly hosting and administering weekly status meetings with assigned Customer Project Manager
- Coordinate all activities with Customer Project Manager and WorkForce Software
- Manage supplier resources and any third-party resources subcontracted by supplier
- Manage risks, action items, and decisions and proactively identify problems and issues
- Ensure project deliverables are of acceptable quality and delivered as scheduled

The following are deliverables for these services within the project:

- Project Plan
- Project Plan Maintenance
- Weekly Project Status Reporting

## CHANGE MANAGEMENT

Change management/user adoption is a key element in the success of any project. WFI's Prosci® certified change managers assist, support and guide the client project team and the identified change managers through the steps of implementing and adopting change. WFI collaborates with the client change managers in the creation of impact analysis, communication plans, and user adoption plans, then, can assist the client change managers to execute those plans.

### Business Process Planning:

- Business Process Overview Document
  - ▶ Future process and impacts
  - ▶ Four (4) user groups (employees, managers, timekeepers, payroll)
    - Employee Demographic
    - Scheduling
    - Time Entry & Time off Request
    - Timecard Review & Timecard Approval
    - Payroll processing & Historical Edits

### Change Management Planning:

- Change Management Strategy Document
  - ▶ Change History
  - ▶ End User Impact Analysis
  - ▶ Change Recommendations
  - ▶ User Adoption Plan
  - ▶ Communication Plan
- Roadmap
  - ▶ Alignment of communication and user adoption plans to the project plan and milestones.

### Change Management Plan Support:

- Business Process
  - ▶ Update Business Process Document (future state) through functional testing, as needed
- Change Management Support:
  - ▶ Communication drafts (emails, ppt)
  - ▶ Prepare Change team to be early adopters and support user adoption activities
  - ▶ Support user adoption activities (testing, training, go live, and pay period end)

## TRAINING

Comprehensive training support is critical to achieving a successful engagement and a positive return on an organization's workforce management investment. As such, Workforce Insight's training experts are a highly important part of the project teams that serve our clients as part of their implementation initiatives. Our training team is comprised of trainers with a long history of experience developing and delivering training using various methodologies and platforms to help organizations transition to their new or upgraded system.

### SERVICES DELIVERED:

#### Training Planning

- Training Strategy Workshop
- Training Strategy Document
  - ▶ Training recommendations
  - ▶ Audience analysis
  - ▶ Training Methodology
  - ▶ Training Planning

#### Core Team Payroll/Superuser Training

- One (1) Power User courses delivered by a WFI Instructor using standard courseware
- Up to 10 participants in each class

#### End User Training

Four (4) instructor-led training courses

- Timekeeping for Managers, Timekeeping for Exempt Employees, Timekeeping for Non-Exempt Employees and Advanced Scheduling for Managers
- Customized training documentation, using WFI's writing style and format, that incorporates client's timekeeping tasks/topics
- Produced in Microsoft Word
- Can be used to deliver instructor-led training and serve as reference material
- Client receives soft copy for ongoing refinement

Four (4) Job Aids

- Customized 'cheat sheet' with steps to perform key tasks (Hourly employee, clocks, web clock, mobile, etc.)
- Developed in PowerPoint
- Up to two (2) pages each
- Client receives soft copy for ongoing refinement

One (1) Train the Trainer Workshop

- Includes a 2.5-day workshop to debrief client resources on content contained within the instructor-led training plus mentoring and team teaching with WFI instructor

## TESTING / DEPLOYMENT STRATEGY / SUPPORT

- Unit testing will be conducted by Workforce Insight (WFI) during the Construction phase.

- End user testing (Functional, System Integration, and User Acceptance testing as applicable) will be conducted by G4S during the Validation Phase