Sympa Custom Onboarding Description

Contents

1 Introduction

The aim of this document is to outline the customer onboarding process and the methodology for implementing the Sympa system. This document details the various phases of the onboarding project, as well as delineating the responsibilities of both Sympa and the customer.

Initially, we discuss general topics pertinent throughout the onboarding project. Subsequently, we delve into each phase of the onboarding project in detail.

Please also refer to the document 'Onboarding Scope' (appendix 1 of the agreement) for specific clarifications pertaining to the customer.

2 General about the onboarding project

2.1 Onboarding scope

For the customer's Sympa solution, which will encompass all features implemented in the Sympa Custom onboarding, we establish the scope of the onboarding project and describe it in the onboarding scope document. The scope consists of two principal areas of focus. Initially, we set out the methodologies and any potential constraints related to our onboarding approach.

Subsequently, we detail the specifics of the customer solution and the degree of customisation that will be incorporated during onboarding. The customer solution comprises features within Sympa, as well as potential connectivity features.

2.2 Connectivity – Building the HR ecosystem

The Sympa Onboarding project may incorporate integrations with other systems, as specified in the Sympa service agreement and elaborated upon in the onboarding scope. The customer holds responsibility for managing the integration project within their organisation and for liaising with third-party vendors. Various connectivity onboarding methods are outlined below.

Connectors and connectivity solutions as self-service

When a connector or another connectivity solution is provided as a self-service, the customer is required to complete a specification survey pertaining to the integration. Some questions may necessitate details from the customer’s IT department or from the vendor of the counter system. The customer also assumes responsibility for configuring and testing the solution in the counter system, either in collaboration with their IT department or a third-party entity. Sympa is always responsible of the configuration in Sympa. Such solutions might include Single Sign-On, AD integration, or an eSign connector, for instance.

Connectors

Connectors are designed in alignment with a predetermined data structure, format, and specification. Customers prepare for the specification either through a survey or other preparatory queries. Final specifications are settled during a workshop involving Sympa, the customer, and a representative from the third-party vendor's solution and integration team. Again, the customer is entrusted with the configuration and testing of the solution in the counter system, working alongside a third-party or their IT department. Sympa is responsible of the configuration in Sympa.

Custom integrations

Custom integrations are deployed using methodologies akin to those for connectors. However, the specifications may not adhere to a pre-established data structure or technical format. Instead, the specifics are determined during a workshop, considering the constraints outlined in the onboarding scope and other pertinent documentation. Read more from the document 'Sympa custom integration methods'.

2.3 Roles in the project

Outlined below are the principal roles within the Sympa custom onboarding project. For a more detailed breakdown of roles and responsibilities, please refer to the RACI matrix located at the conclusion of this document.

- **Sympa's project manager** – Responsible for comprehensive task management and guidance for all project participants.
- **Customer's project manager** – Accountable for all tasks delegated to the customer and for liaising with third parties[1].
- **Connectivity project manager** – Tasked with overseeing integration project management at Sympa. This role is designated for projects with a more complex connectivity architecture.
- **Steering group** – The Steering group ratifies the project plan, any potential modifications to it, and the commencement and closing of the project. If agreed in the project plan, the project team can have the responsibilities of the Steering Group.
- **Third-party vendors[1]** – Hold responsibility for the implementation and testing of integrations within their system.
- **Onboarding users** (Number specified in the quote/agreement): Designated individuals from the customer's side who have access to the project management tool and support portal throughout the onboarding project. The customer's project manager is one of these individuals.

[1] *For instance, companies providing payroll systems or payroll services to the customer.*

2.4 Meetings and communication – Our collaboration method

Our primary method of collaboration during the onboarding process is the project management tool, Asana. Further details about Asana can be found in the subsequent section, 2.5. In addition to this tool, we convene through various online and, when feasible, in-person meetings, as outlined in the project plan. The principal types of meetings are briefly described below, with comprehensive explanations provided later in this document:

- **Project meetings** – These sessions are dedicated to strategising and scheduling the project, determining its commencement, and concluding the project activities.
- **Check-in calls** – These are concise online discussions aimed at reviewing the current status and progress of the project.
- **Workshops in the Build-up phase** – During these workshops, we collaborate to determine the customisation approach for specific features and integrations.
- **Steering group meetings** – In these meetings, we assess and endorse the accomplished outcomes and any potential modifications to the original project plan.

2.5 Asana project management tool

At the core of our customer onboarding process is the reliable project management tool, Asana. We use this strong tool to guide customers smoothly through the onboarding journey and to keep all key project steps and materials in one place. All communications related to the project, list of tasks, documentation, task completions, and approvals are done using Asana. The Sympa project manager updates, assigns, and sets times for the tasks.

The customer's responsibility is to finish the tasks assigned to them on time. Any discussion about the tasks is done within Asana.

As part of our commitment to data protection and privacy, Asana exclusively captures and retains only two essential pieces of information about the customer: the customer's name and email address. All data is stored in data centre located in EU. This approach ensures data minimization and security, allowing us to focus on the core elements necessary for a successful onboarding experience. With Asana, your project data is not only organised and accessible but also well-protected, aligning with our dedication to privacy and compliance with data protection regulations.

Any material with private employee information should be sent to Sympa using the customer's Sympa system, not Asana.

Task list

The task list has all the significant tasks for the Sympa project, assigned to either the customer or Sympa. Tasks should be finished or approved by the person they are given to in project management tool. Both the customer's and Sympa's project managers handle tasks for their groups.

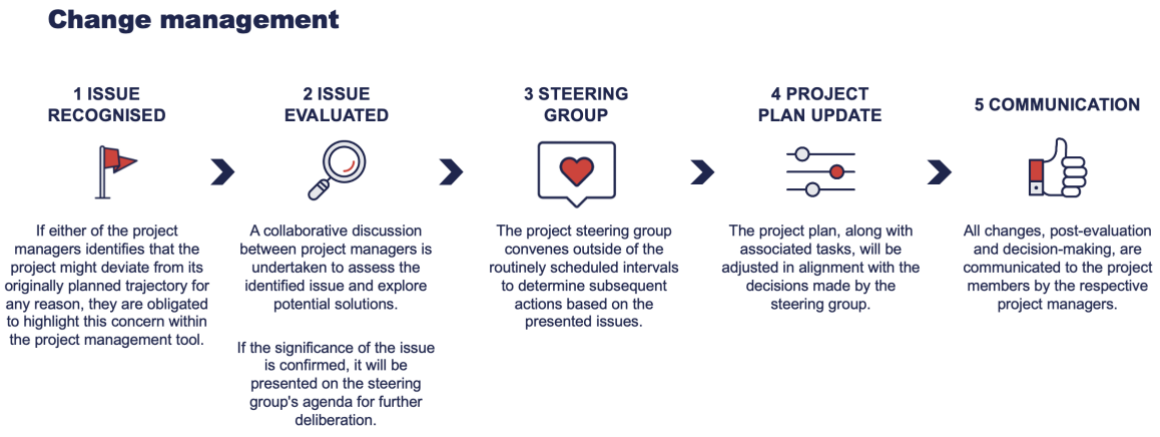
The task list is looked at during calls and meetings and updated by Sympa. All tasks for one project phase should be done before moving to the next phase. The list helps make sure all tasks are done, the project stays on time, and the work is approved.

Customers should note that the Sympa task list doesn't have the customer's own internal tasks. This includes things like talking within the company, handling documents, and the customer's project team tasks. We suggest customers keep their own task list or an inside project for their company's needs. Asana's 'My tasks' function can be used for this.

2.6 Change management

Should significant modifications be required during the project's duration, such matters will be addressed within the Steering Group. Change requests are formally submitted to the Steering Group by Sympa's project manager. For all substantial modifications, the outlined process in the provided image will be adhered to. The following constitute substantial changes:

- Alterations to the overall project schedule
- Variations in the project's scope and content
- Changes in the project organisation
- Adjustments in projected work estimates



2.7 Configuration of the Sympa environment

Sympa's project manager is responsible for configuration[2] of the Sympa system during the project and will execute the changes with other Sympa experts. The type and level of customisation is described in the Onboarding scope document. The customer can view all the adjustments during the onboarding project in their own Sympa solution.

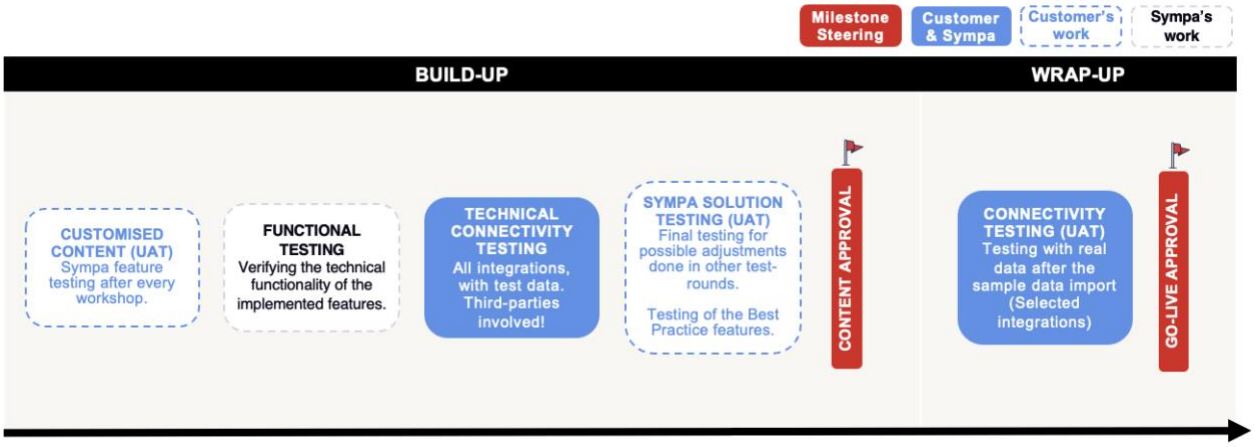
After the customer has approved the delivered Sympa solution, the responsibility of the future development of the solution transfers to the customer. The customer owns the configuration of the service after approval of the deliverables.

[2] *Adjusting the features and integration interfaces in the Sympa system.*

2.8 Testing and approving the delivered solution

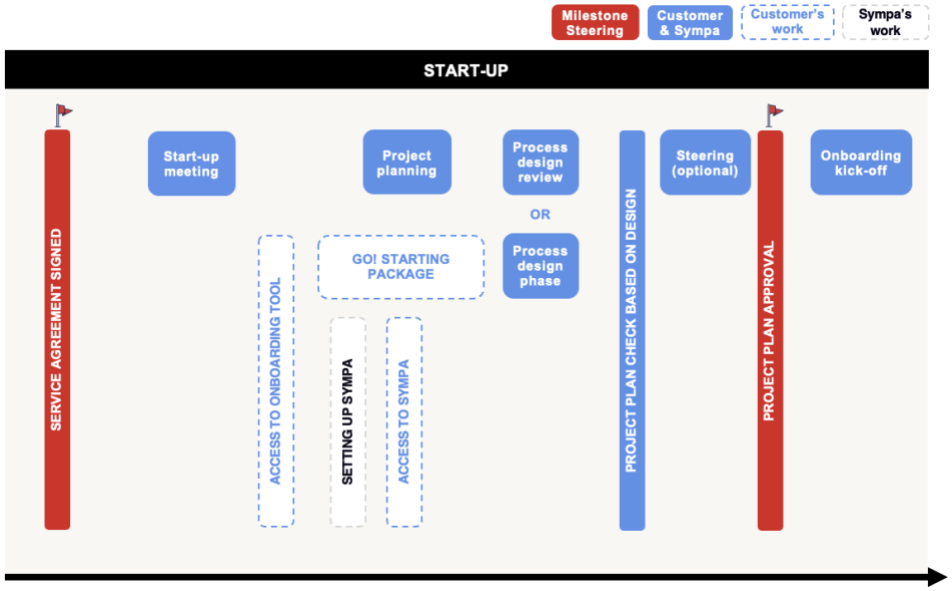
Every onboarding project entails a User Acceptance Testing (UAT) involving the customer. This phase of testing ensures that the implemented content aligns accurately with the agreed-upon specifications and that the system's processes operate as defined. Throughout the project, the customer evaluates the content using the designated test accounts.

The Sympa solution, along with any integrations, undergoes testing by both Sympa, the customer, and the third-party system vendors. Every testing phase mandates an approval before progressing to the subsequent phase. Further details on testing and approvals can be found in the following sections.



3 Start-up phase

The Start-up phase is pivotal for facilitating a seamless onboarding project that adheres to the timeline and delivers the outcomes outlined in the Sympa service agreement.



3.1 Start-up meeting

During the Start-up meeting, Sympa's and the customer's project managers, along with Sympa's sales representative, review the agreed-upon scope of onboarding. They discuss a high-level timeline and potential challenges in the project. If the customer's project manager was not involved in the sales phase, it's advisable to also invite the individual overseeing the Sympa service agreement to this meeting.

3.2 Sympa GO starting package

Post the Start-up meeting, Sympa's project manager will provide access to the Sympa GO starting package and the project management tool. This package comprises guides and preparatory tasks for the customer, addressing both onboarding project methodologies and guidance for utilising and configuring the Sympa system.

Within the onboarding tool, customers can familiarise themselves with tasks to be assigned later in the project. All participants in the onboarding project will undergo a self-guided training.

The primary objective of this package is to ensure the project's efficacy through thorough preparation. Task submissions will be facilitated via project management tool.

3.3 Access to customer's Sympa solution

A dedicated Sympa solution, featuring the Sympa Custom onboarding content, will be set up for the customer. Test user accounts will be generated for the customer's project team to access the system, providing feedback on content and any modifications. These test accounts will cater to various roles, including employee, manager, and HR user.

3.4 Project planning

The essence of project planning is to delineate the project's goals, timeline, required resources, and to establish mutual protocols, as well as planning the implementation of potential system integrations.

Sympa's project manager orchestrates the Project planning meeting in collaboration with the customer's project manager, furnishing preparatory materials in advance.

Project planning resumes post the Process design phase, culminating in final modifications to the project plan. Once ratified by the project managers, the plan is presented to the steering group for final approval and subsequently shared during the Onboarding kick-off meeting.

Project plan document

Sympa's project manager undertakes the creation and maintenance of a comprehensive project plan for the Sympa onboarding. The steering group endorses the project plan and any ensuing amendments, as per the change management procedure detailed in section 2.6. The Sympa onboarding project plan will encompass:

- Project objectives and inception
- Project scope and content (incl. limitations)
- Metrics and criteria for the project
- Project organisation, roles, and responsibilities
- Timeline
- Principles of communication and decision-making
- Risk evaluation
- Documentation related to the project
- Change management procedures

3.5 Process design

The aim of process design is to build a framework for the *Build-up phase* when we implement all the features included in the onboarding scope. Sympa Custom onboarding always includes a *Process design review* described below. In case the actual *Process design phase* is included in the scope, review will be replaced with that.

The project plan will be updated according to the design outcome, if needed. If the result of the process design is to change the scope of the onboarding, new work estimate, and pricing will be agreed.

Process design review

This review covers three topics. First one is to outline framework settings affecting to most of the features, such us organisation structure and user rights. Second, the key features will be reviewed to ensure a match of the Sympa solution and customer's HR processes. Third, possible pain points regarding connectivity with other systems will be identified and approach to those will be prepared. This is done in a meeting with Sympa, customer's project manager and if applicable, customer's experts related to selected key features and connectivity.

Sympa design phase

The Sympa design phase is an optional add-on that can be incorporated into the onboarding project. Its main objective is to deepen the understanding of the current state and challenges associated with the customer's HR processes and IT framework. This phase conducts a thorough analysis of the main existing HR processes, pinpointing the effective elements, identifying areas of improvement, and assessing the resources currently expended, directly correlating to the ROI of the HR system.

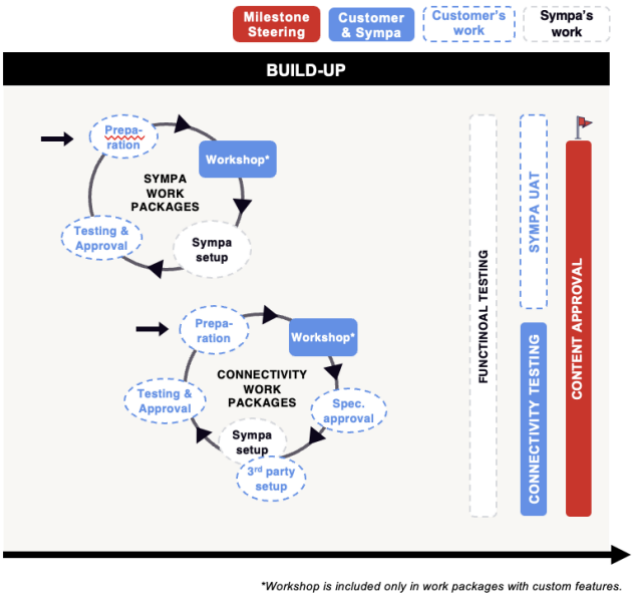
Utilising service design methodologies, this phase envisions the desired future state of the customer's HR processes and IT landscape. This foresight establishes a solid foundation for the customer's subsequent Sympa onboarding project. The tangible outcomes of the design phase are detailed process diagrams of the pivotal HR processes, and a visual representation of the integration architecture, elucidating the data flows pertinent to the HR system.

The Sympa design phase comprises three workshops, each lasting 2 to 3 hours. Among these sessions, one is dedicated to addressing connectivity with connected systems, while the remainder delve into HR processes in the context of Sympa.

3.6 Onboarding kick-off

The kick-off meeting serves as an introductory session where both parties familiarise themselves with each other's operations. During this meeting, an overview of Sympa, both as an organisation and as a system, is presented to the project team. The customer's project manager introduces their respective company and highlights any specific organisational attributes that are pertinent to the onboarding project. Subsequently, Sympa's project manager delineates the project plan, methodologies to be employed, and outlines the forthcoming steps in the onboarding process.

4 Build-up phase



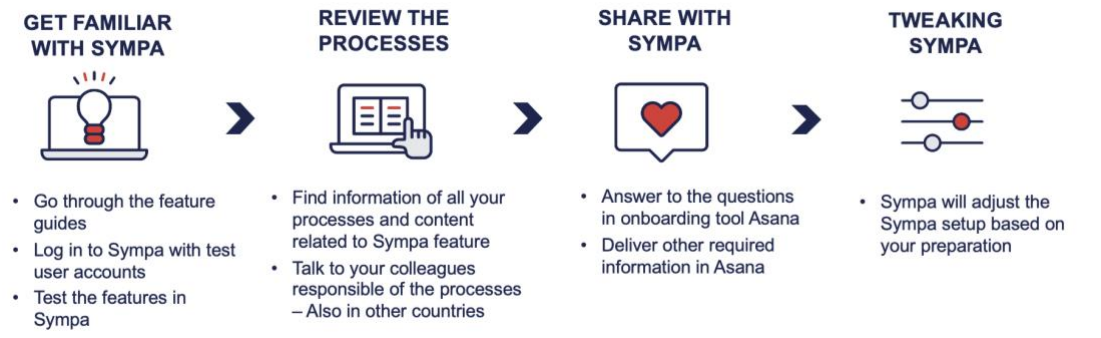
4.1 Sympa work packages

Each Sympa work package that encompasses customised features integrates a specification workshop. The coordination of these workshops falls under the responsibility of Sympa's project manager, in collaboration with the customer's project manager. The workshop operates on a three-stage model:

1. Preparation for the workshop
2. Conducting the workshop
3. Post-workshop tasks

Preparation for the workshop

During the preparatory phase (as illustrated in the image below), the customer explores the designated Sympa features set for discussion in the impending workshop. This is done using the test user accounts. Concurrently, they assess their own associated processes. Responses to the specification queries, along with any requisite materials, are to be uploaded to the project management tool within the agreed timeframe. Based on the feedback and materials from the customer, Sympa implements the necessary modifications to the system.



Conducting the workshop

The workshop begins by revisiting changes implemented following the previous session. Feedback derived from the customer's testing phase, along with the endorsement of the showcased content, is carefully considered.

Subsequent discussions focus on the content agreed for the current workshop and its alignment with the customer's processes. Real-time changes can be made to the Sympa system during the workshop. However, certain alterations or additions that demand more extensive work are documented for post-workshop implementation.

In wrapping up, content intended for the upcoming workshop is introduced, and the customer's related processes are collaboratively examined. If the project includes the Sympa design phase, the outcomes from that phase are utilised.

Post-workshop tasks

Following the workshop, Sympa's project manager proceeds to update the task list within the project management tool. Task execution is a joint venture, with both the customer's and Sympa's project teams working diligently on their assigned responsibilities. After these tasks, the customer is tasked with evaluating the modified content and processes using the provided test accounts.

4.2 Defining user privileges

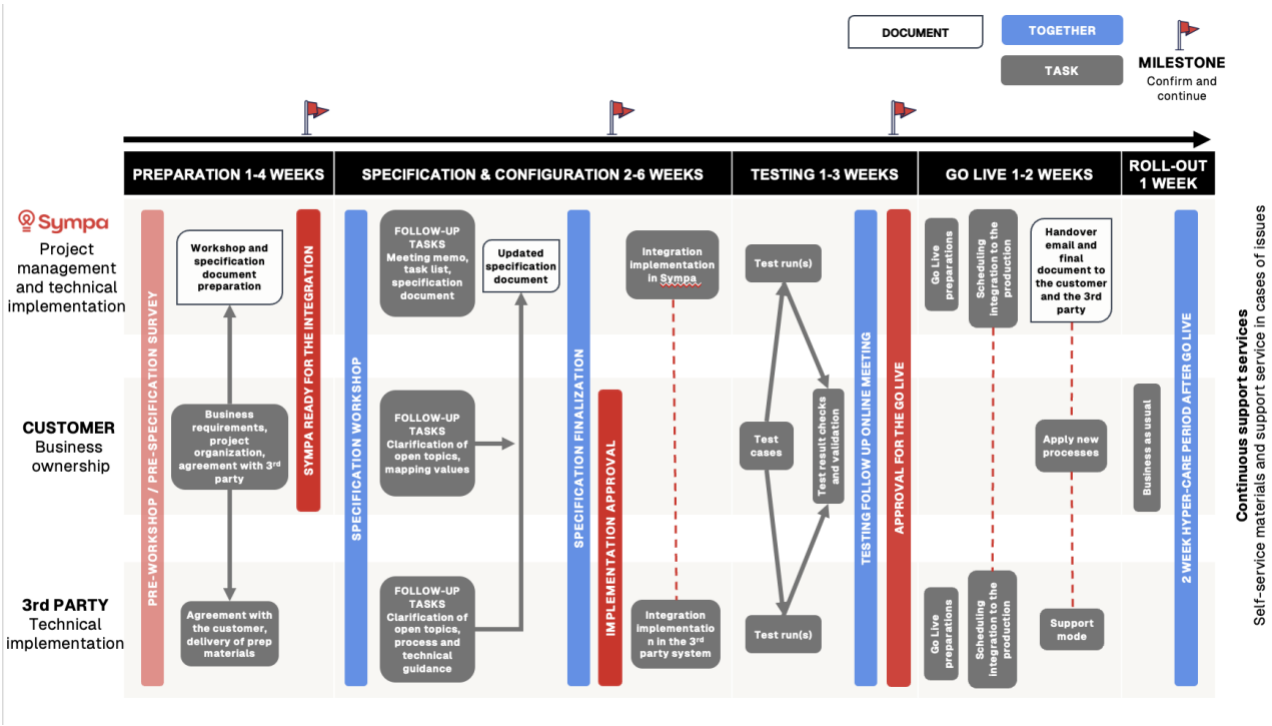
User privileges are specified during workshops and are systematically documented in the 'User privileges' document. This document articulates the permissions associated with each user role for operational use. The responsibility of managing and updating of the User privileges document during the onboarding project rests with Sympa's project manager. Standard user privileges are set during the Build-up phase, and individual user rights are finalised after the user data import (refer to section 5.2 for further details).

4.3 Functional testing

The responsibility of conducting functional testing for the customer's Sympa solution lies with Sympa's project manager. This testing phase primarily focuses on verifying the technical functionality of the implemented features. To ensure comprehensive evaluation, another member of Sympa's project team, distinct from the project manager, reviews the customer environment. This review guarantees that the environment is primed and set for the customer's acceptance testing. It's essential to note that functional testing is executed without incorporating real employee data.

4.4 Connectivity – Connectors and custom integrations

Most connectors, along with all custom integrations, adhere to the process outlined below.



Connectors are structured based on a pre-established data format and specification. Customers prepare for the specification either via a survey or other preliminary inquiries in the project management tool. Detailed specifics are solidified during a connector workshop involving Sympa, the customer, and typically a representative from the third-party vendor. The customer ensures all pertinent participants attend the workshop. Post-workshop, both Sympa and the third-party vendor initiate the integration based on the ratified specification and subsequently test the configuration. Collaborative discussions determine the launch dates.

Specification

The integration specification is collaboratively developed involving the customer, Sympa, and the third-party system vendor. To facilitate this, the customer will coordinate an integration workshop to which all relevant parties are invited. Sympa is entrusted with the task of formulating and maintaining the integration specification document. Given the customer's intimate knowledge of their processes, they supply the essential information detailing the data flow for the integration. Both Sympa and the designated system provider ensure precise data transfer and extend advisory support to the customer as needed.

For **connectors**, a standardised connector framework, which includes structure and content, is utilized. This framework is then adapted to meet the specific needs of the customer.

In the case of **custom integrations**, a more detailed specification is required. This is crafted in partnership with the third-party system vendor. When available, pre-existing specification templates are used as a starting point. The specification document requires the approval from the customer, Sympa, and the third-party vendor.

Implementation

Upon specification approval, Sympa orchestrates the integration as per the agreed-upon terms. The third-party vendor ensures their setup aligns with the approved specification. The customer synchronizes the third-party vendor's timeline with the overall Sympa onboarding project schedule.

Technical testing

Both Sympa and the third-party vendor undertake the technical testing of the integration. Testing predominantly utilises test profiles, with the customer supplying pertinent test data. The creation of possible test data/files to be imported to Sympa (Not included in most of the integrations.) is customers and third-party vendors responsibility.

Process testing

Both the customer and third-party system provider oversee process testing. Post technical configuration, the integration is transitioned to the production environment, enabling the customer to evaluate the system's holistic functionality using Sympa. Testing can employ comprehensive employee data or specific employee sample (more details in section 5.2 and 5.3.). Any identified issues are rectified by the respective parties, with testing persisting until customer approval.

Approval

The customer validates integrations that align with the approved specification document. Any deviations or enhancements beyond the documented specification may incur additional costs. Integrations must receive approval prior to the transmission of actual employee data. Sympa updates the integration specification document to reflect any post-onboarding modifications, with changes billed as per prevailing rates.

4.5 Connectivity – Solutions as self-service

Some of the connectors and other connectivity solution is provided as a self-service. Such solutions might include Single Sign-On, AD integration, or an eSign connector, for instance.

Specification

In some cases, when a self-service approach is used, customers are expected to fill out a specification survey related to the integration within the project management tool. Some queries within the survey may require input from the customer’s IT team or from the provider of the related system. The customer bears the responsibility of coordinating and liaising with all relevant parties.

Implementation

It is the customer's duty to oversee the configuration of the solution, either independently or in conjunction with their IT team or an external system provider. The implementation process may also entail the provision of certain configuration data to Sympa via project management tool.

Testing and approval

The customer, in collaboration with any other relevant stakeholders, will test the solution following the provided guidelines. Upon satisfactory evaluation, the customer will convey their approval through project management tool.

4.6 User acceptance testing – Sympa solution

The comprehensive acceptance testing for the Sympa solution takes place after all the agreed content has been defined and approved in the workshops and technical connectivity testing is completed. The responsibility of conducting the acceptance testing lies with the customer, who also delineates the testing methodology. To aid this process, Sympa's project manager provides the customer with a testing guideline, highlighting prevalent processes and functionalities in Sympa, accompanied by suggestions for effective testing.

During the acceptance testing, the customer's project manager identifies and compiles any discrepancies observed in the implementation and logs them in project management tool. Sympa addresses these issues to ensure compliance with contractual obligations, after which the customer reviews the corrections. If deemed essential, the customer can organise a subsequent acceptance testing. Any comments on changes or requests beyond the original scope are documented as post-project tasks. These will be assessed at a later time, and if approved, they may incur additional charges.

Test group

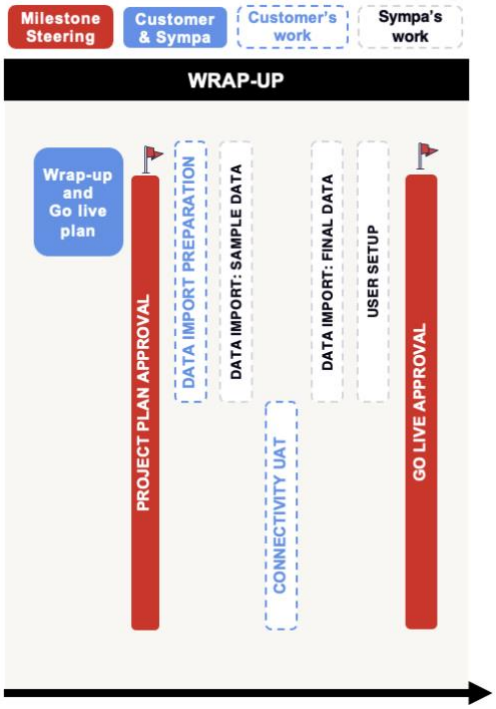
Acceptance testing employs a designated test group. The customer handpicks this group from their own organisation, ensuring representation across various user roles. Ideally, the test group should comprise at least one employee, one manager, and one or more HR users. The customer establishes these test user profiles within the system and inputs the requisite data. Sympa's project manager then configures user permissions for the test group, adhering to the pre-approved user privileges document.

4.7 Content approval

Upon the successful completion of testing for both the Sympa and connectivity solution, the project managers present the approved content to the steering group for validation. With the endorsement of the steering group, the project can then transition to the Wrap-up phase.

5 Wrap-up

The Wrap-up phase is dedicated to finalising preparations for Sympa's go-live.



5.1 Wrap-up and Go-live plan

The initiation of the Wrap-up phase involves the formulation of a comprehensive wrap-up and go-live plan. During this planning process, the current status of the project is assessed, and any necessary modifications to the initially agreed-upon timeline in the project plan are made. This revised plan is then presented to the steering group by the project managers. Upon receiving the steering group's endorsement, the concluding phases of the project are set in motion.

5.2 Data import

Data import includes a singular transfer of employee data into the Sympa system. The customer assumes responsibility for data collection and its conversion, while Sympa manages the data migration, ensuring that validated data is seamlessly imported into the Sympa system.

The data import process is divided into two phases. The initial phase encompasses sample data from a select group of employees, while the subsequent phase entails data from the entire employee base.

Data import template and data entry

Sympa’s project manager provides the customer with a data import template (in Excel format) along with comprehensive guidelines for data entry. This template is tailored to resonate with the structure of the customer's Sympa solution. The responsibility lies with the customer to populate the data import template and to validate the data, both structurally and content-wise.

The customer is expected to submit the completed data import file adhering to the mutually agreed timeline. Given the sensitive nature of the data, the customer's Sympa system serves as the secure channel for data transfer.

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 solution. 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. Import may include one run of sample data of the actual data, which is used for testing some of the integrations.

Testing and approving the data import

The success of the data import is verified by Sympa through log analyses and spot checks. Concurrently, the customer evaluates the import's efficacy via reporting and selective checks. Upon satisfactory completion, the customer approves the data import, and the ownership of data maintenance transitions to the customer.

After receiving approval, Sympa will also establish possible personal user privileges in accordance with the previously agreed-upon privilege plan.

5.3 Connectivity user acceptance testing

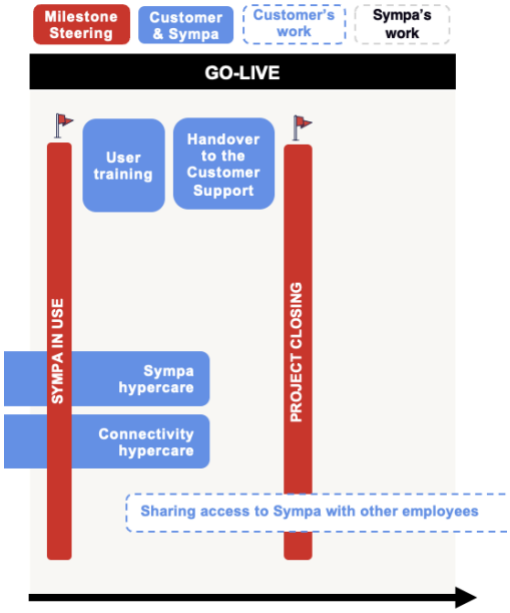
Once the authentic sample data of employees has been imported into Sympa, the chosen integrations can undergo the final user acceptance testing using this actual data. For further details on connectivity testing and the approval process, please refer to section 4.5 and 4.6.

5.4 Go-live approval

The Wrap-up phase is concluded upon receiving approval from the steering group for the implementation, in accordance with the project plan and agreement, and subsequently transitioning to production use

6 Go-live

In the Go-live phase Sympa will ensure that all features and processes are activated, key users' knowledge is enhanced to required level and login procedure is planned before closing the Sympa onboarding project.



6.1 Enhanced support during hypercare

During hypercare periods, Sympa provides enhanced support from professionals who were involved in the customer onboarding project. This intensive support ensures that the system functions properly and that any arising issues are addressed promptly. The two-week support periods end latest by the time of the project handover. Thereafter, support is provided in accordance with the Sympa service agreement.

Once the Sympa system begins operating with actual data, after the data import (Read more in the section 5.2.), a two-week hypercare period commences. For optimal benefits during this period, Sympa advises active utilisation of the system. Concerning integrations, the hypercare phase begins when an integration is initiated, and actual data starts transferring to the agreed server. Sympa recommends actively monitoring and using the integrations throughout this period.

6.2 User training

Training for users commences at the beginning of the project with the training covering basics of Sympa. A core aim of the workshop model ensures that project team members become acquainted with the system and the embedded processes already during the onboarding project. This enables them to independently introduce the system to the end users.

Any additional user training included in the agreement will take place during the Go-live phase. The responsibility is on the customer to coordinate potential training events in collaboration with Sympa. These training sessions are conducted within the customer's unique Sympa solution, utilising distinct training user accounts. The customer bears the responsibility for generating these training user accounts in the system. Conversely, Sympa is accountable for establishing the user privileges associated with these training accounts.

System administrator

The customer has the option to undergo training to become a system administrator for Sympa. The optimal timing for this system administrator training is post the onboarding project, ensuring the future admin user(s) possess a robust understanding of Sympa's general functionalities and the solutions tailored for the customer. As a system admin, the following tasks can be executed:

- Conduct through salary reviews and manage training programs.
- Generate shared reports, fostering informed decision-making across various departments.
- With admin access, there's the capability to fine-tune user privileges, approvals, and set up automated reminders, bolstering the security and efficiency of HR functions.
- Furthermore, it permits the establishment of data retention guidelines and the configuration of custom fields.

6.3 User login to Sympa

The customer holds the responsibility for sharing the essential login credentials to their employees. It is within the customer's discretion to determine and regulate when and which user groups are granted access to the Service. This access can be extended all at once to all employees or can be gradually provided to specific employee groups in phases. The timeline for granting access does not hinder the completion of the Sympa onboarding project.

If SSO (Single Sign-On) is activated, the Sympa system is ready for login, and only the link to the login page needs to be provided to the customer.

If SSO is not in use, the customer will guide its employees to the appropriate login page, using a personal username (typically their email), and initiate the password generation process for them.

6.4 Project completion

Sympa's project manager drafts a conclusive steering group documentation to suggest project’s termination to the steering group. The steering group evaluates the project's outcomes, verifies if the objectives were met, and ensures all assigned tasks have been fulfilled before officially closing the project.

Feedback collection

The final feedback of the project is gathered through a satisfaction survey directed at the customer's project manager. If desired, feedback can also be obtained from other project team members. The feedback will be handled and responded in the handover meeting.

Handover meeting

A handover meeting for the project is organised by Sympa's project manager. Representing Sympa at this meeting will be the project manager and the Customer Success Manager, who oversees the customer account. The meeting's agenda includes reviewing the final project document, evaluating the project's success, and planning the future steps.

Upon conclusion of the handover meeting, the customer transitions to an ongoing service. Subsequent actions and steps are coordinated with the Customer Success Manager.

Post the handover meeting, the project workspace within the project management tool is terminated.

Table 1 – 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 GO -starting package	A / C		R	I	
2. Project management tool	A / R / C	I	R	I	
3. Project plan	R / C	I	C	I	A / R
4. Setting up the Sympa for the customer	A / R		I	I	
5. Start-up meetings	A / R		R	R	I
6. Setting up project test accounts in Sympa	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 privileges	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 technical testing	R / A	R	I	Third-party vendor R / A	
21. Integration 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 / A / I	I	
31. Final report	R		I	I	A
32. Project closure	R		R	I	A / R
33. Handover meeting	A / R		R	I	I
34. Transfer to continuous service	A / R		I		I