

PAF01: Personnel Actions (PAF) Agenda

Objective: Overview of Personnel Actions. A SunGard consultant will conduct a needs analysis and initial set up and configuration of the module. Screens will be set up and reviewed and be ready for testing.

Recommended Training Format: SunGard Remote

Logistics: Conference Room with Computer, Internet Access, Projector and White Board

Estimated Hours: 2 Hours

Professional Services: SunGard Consultant; Remote Project Manager (if applicable)

Audience: Key Staff Members from HR (should include Management)

Prerequisites:

- PAF module licensed and installed

E-Learning Available:

- No

Agenda/Session Goals:

- Introductions
- Project Overview and Expectations
 - Overview of Personnel Actions
- SunGard Demonstration of ONESolution
 - Demonstrate PAF screens
 - HRPASL – Salary Change
 - HRPAST – Status Change
 - HRPASP - Supplemental Pay
 - HRPASR - Separation
 - HRPACC – Position Change
 - HRPANH – New Hire
- Client Discussion of current Legacy System and Processes
 - Gather Examples and Screen Prints From Legacy System (if applicable)
- OnTrack Client Configuration Survey – Review and Update (if applicable)
- OnTrack Configuration Worksheet – Review and Update (if applicable)
- Customer Configuration
 - None
- SunGard ONESolution HRPY Configuration
 - Set-up common codes
 - HR codes
 - Payroll Contributions

- SunGard
- Initial Test
 - Test all PAF screens

SunGard Deliverables:

- Module overview and system set up
- Screens ready for testing
- Trip report or DL log outlining what has been accomplished.

Assigned to Client:

- Test screen functionality for all six screens

PAF02: Personnel Actions (PAF) Agenda

Objective: Overview of Personnel Actions WorkFlow models. A SunGard consultant will conduct a needs analysis, review and initial set up and configuration of the WorkFlow models. Models will be loaded and activated.

Recommended Training Format: SunGard Remote

Logistics: Conference Room with Computer, Internet Access, Projector and White Board

Estimated Hours: 2 Hours

Professional Services: SunGard Consultant; Remote Project Manager (if applicable)

Audience: Key Staff Members from HR (Should Include Management). IT and or staff who maintain WorkFlow

Prerequisites:

- PAF01

E-Learning Available:

- No

Agenda/Session Goals:

- Introductions
- Review Project and Expectations
- Load and activate WorkFlow Models
- Client Discussion of current Legacy System and Processes
- Review standard PAF WorkFlow models
- SunGard ONESolution HRPY Configuration
 - Set-up common codes for WF processing
 - Test Workflows Updates
 - Document any set-up changes needed
- Customer Configuration
 - None
- Initial Test
 - Ensure Workflow is updating HR as expected for next session

SunGard Deliverables:

- WorkFlow model overview
- Ensure Workflow is updating HR as expected for next session
- Trip report or DL log outlining what has been accomplished.

Assigned to Client:

- None

PAF03: Personnel Actions (PAF) Agenda

Objective: Work with HR Staff on processing PA from start to finish; demonstrate/test each screen through the WF update to HR

Recommended Training Format: SunGard Remote

Logistics: Conference Room with Computer, Internet Access, Projector and White Board

Estimated Hours: 2 Hours

Professional Services: SunGard Consultant; Remote Project Manager (if applicable)

Audience: Key Staff Members from HR (Should Include Management). IT and or staff who maintain WorkFlow

Prerequisites:

- PAF01 and PAF02

E-Learning Available:

- No

Agenda/Session Goals:

- Review Project, expectations and status
- Go through entire process with WorkFlow activated
- Resolve any issues (if applicable)
- SunGard ONESolution HRPY Configuration
 - None
- Customer Configuration
 - None
- Test
 - Ensure Workflows are working as expected and are ready to be thoroughly tested

SunGard Deliverables:

- Train users on entire process
- Ensure Workflow is updating HR as expected for next session
- Trip report or DL log outlining what has been accomplished.

Assigned to Client:

- Test entire module

PAF04: Personnel Actions (PAF) Agenda

Objective: SunGard consultant will conduct an analysis of business processes and work with customer to determine if standard advanced workflow models need to be modified/adjusted. Build in approvals and business processes into the Personnel Actions Form processing.

Recommended Training Format: SunGard Remote

Logistics: Conference Room with Computer, Internet Access, Projector and White Board

Estimated Hours: 2 Hours

Professional Services: SunGard Consultant; Remote Project Manager (if applicable)

Audience: Key Staff Members from HR (Should Include Management). IT and or staff who maintain WorkFlow

Prerequisites:

- PAF01, PAF02, PAF03

E-Learning Available:

- No

Agenda/Session Goals:

- Review Project, expectations and status
- Review process and make adjustments to WorkFlow approval and business process
- Resolve any issues (if applicable)
- SunGard ONESolution HRPY Configuration
 - None
- Customer Configuration
 - None
- Test
 - Ensure Workflows are working as expected and are ready to be thoroughly tested

SunGard Deliverables:

- Ensure approvals and processes are working as designed
- Trip report or DL log outlining what has been accomplished.

Assigned to Client:

- Test entire module with added WorkFlow

PAF05: Personnel Actions (PAF) Agenda

Objective: Advanced Consulting and Issue Resolution

Recommended Training Format: SunGard Remote

Logistics: Conference Room with Computer, Internet Access, Projector and White Board

Estimated Hours: 2 Hours

Professional Services: SunGard Consultant; Remote Project Manager (if applicable)

Audience: Key Staff Members from HR (Should Include Management). IT and or staff who maintain WorkFlow

Prerequisites:

- PAF01, PAF02, PAF03, and PAF04

E-Learning Available:

- No

Agenda/Session Goals:

- Review Project, expectations and status
- Review process and conduct issue resolution
- Resolve any issues (if applicable)
- SunGard ONESolution HRPY Configuration
 - None
- Customer Configuration
 - None
- Test
 - Test entire process

SunGard Deliverables:

- Trip report or DL log outlining what has been accomplished.

Assigned to Client:

- Test entire module and prepare for go live