

Service Overview

FlightPath for Access People XD Roster Management

Together we'll land this implementation



FlightPath your Access software journey

We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation, how the system is rolled out is critical if full value from your new investment is to be achieved.

We also know that you may view new software implementations with some trepidation and many customers can find this period daunting. In fact, for some customers, this may be the first software roll out they have managed.

We recognise this and we have designed our best practice, remote first implementation services to help ensure you have a great experience and are looked after along the way, so that the whole process is less daunting... this is our FlightPath implementation approach.

In this Service Overview we explain your options and what is contained within the FlightPath Packages available to help implement your software, along with the additional services you can opt to include.

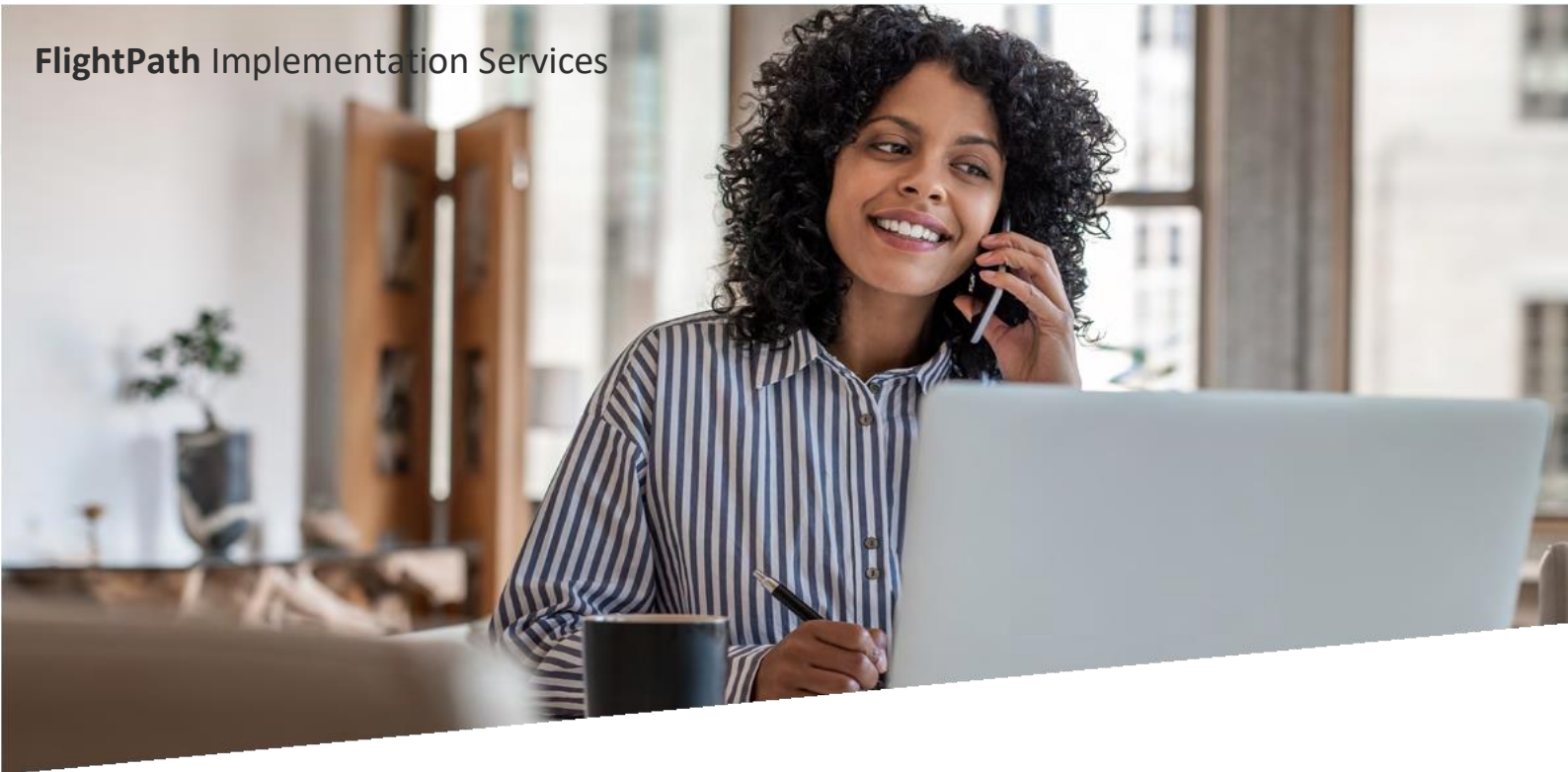
Seamless implementation, delivered 100% remotely

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.



FlightPath:
your six-stage journey to success

We'll be sending you regular updates to keep you on track and ensure it is clear where you are on the journey - every step of the way.



You have control, but we are never far from your side.

Each FlightPath implementation programme from Access follows a well-defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team. The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

FlightPath for XD Roster Management

The tables below summarise what's included within the FlightPath packages. We will help you choose the package that's right for you but please review this table to ensure your understanding.

FlightPath A	FlightPath B	FlightPath C
<p>Overview</p> <p>Implementation of XD Roster Management to simplify and automate scheduling related functions and processes for small organisations. Use of pre-defined functions and 4 user profiles minimises the need for our Project Governance. This pathway is best suited to smaller clients or organisation looking to take the solution out of the box. Training is provided on our front-end configuration. Available for hosted deployments only. Clients can opt for further configuration by Access following launch</p>	<p>Overview</p> <p>Implementation of XD Roster Management to simplify and automate scheduling related functions and processes for small to medium sized multi-site environments. Includes access and training on the administration features enabling organisations to begin to configure and customise certain elements to further tailor the solution to their needs. Available for hosted deployments only. Organisations also benefit from the additional check in sessions, as well as limited Project Governance</p>	<p>Overview</p> <p>Implementation of XD Roster Management to simplify and automate scheduling related functions and processes for large multi-site environments with extended or complex systems. Includes access and training in the administration features enabling organisation to begin to customise certain elements of the solution. Additionally, scoping will be undertaken to enable further configuration changes to key workflows within the system. Available for hosted deployments only. Project Governance is included as part of the Flight Path package</p>
<p>FlightPath Content Implement XD Roster Management processes including:</p> <p>Self-service portal for employees, managers, and administrators to manually create and publish rosters, view alerts, manage exceptions and events, utilise standard reports and notifications, manage un-rostered bookings, and employee availability</p>	<p>FlightPath Content Implement XD Roster Management processes including:</p> <p>Self-service portal for employees, managers, and administrators to create rosters via demand templates, fill uncovered shifts, manage shift swaps, create and maintain role-based attributes, and view stats comparing roster vs. demand</p>	<p>FlightPath Content Implement XD Roster Management processes including:</p> <p>Self-service portal for employees, managers, and administrators to use the AutoRoster functionality to automatically fill rosters based on demand templates, employee availability, and validation rules. The ability track planned and actual costs vs. budget, and generate live exceptions based on clocking data</p>
<p>Included FlightPath Services</p> <p>Key services delivered include a Welcome Meeting, Readiness task list, Design Review sessions, remote Training sessions, and Validation Check in sessions.</p> <p>Online videos/documentation to provide further instructions on particular topics.</p> <p>No Project Management.</p> <p>1 LMS user</p>	<p>Included FlightPath Services</p> <p>Key services delivered include a Welcome Meeting, readiness task review session, functional/scoping workshops, remote training sessions, Validation support, and go live readiness check ins.</p> <p>Online videos/documentation to provide further instructions on particular topics. Deployment access and training in use of key elements within the admin features.</p> <p>Basic Project Governance.</p> <p>3 LMS users</p>	<p>Included FlightPath Services</p> <p>Key services delivered include a Welcome Meeting, formal Project Kick-Off, readiness task review session, functional/scoping workshops, remote training sessions, Validation support, go live readiness check ins, and post go live support.</p> <p>Online videos to provide further instructions on particular topics.</p> <p>Deployment access and training in use of key elements within the admin features.</p> <p>Expanded Project Governance.</p> <p>Unlimited LMS users</p>
<p>Addition Services available</p> <p>Additional user training</p> <p>Additional modular training</p> <p>Additional LMS users</p> <p>Additional project governance</p> <p>Additional reporting training</p> <p>Additional report creation</p>	<p>Addition Services available</p> <p>Additional user training</p> <p>Additional modular training</p> <p>Additional LMS users</p> <p>Additional project governance</p> <p>Additional reporting training</p> <p>Additional report creation</p>	<p>Addition Services available</p> <p>Additional user training</p> <p>Additional modular training</p> <p>Additional LMS users</p> <p>Additional project governance</p> <p>Additional reporting training</p> <p>Additional report creation</p>

Greater detail can be found in the tables on the following pages.

Product features enabled per FlightPath package for XD Roster Management

Feature	Summary	FlightPath A	FlightPath B	FlightPath C
Manual Rostering	Ability to enter, update, and remove shifts for employee schedules	●	●	●
Roster Alerts	Ability to view alerts related to scheduling based on rules applied	●	●	●
Un-Rostered Booking	Ability to book leave for un-scheduled weeks and automatically calculate absence hours	●	●	●
Exception Handling (from clocks)	Ability to clock against schedules (in application only) and generate exceptions for managers to review and action	●	●	●
Event Management	Ability to create events visible for managers when planning schedules	●	●	●
Roster Publication	Ability for managers to publish a weekly schedule to employees	●	●	●
Standard Notifications	Ability to leverage the standard Roster Management notifications	●	●	●
Standard Reports	Ability to run standard Roster Management reports via CoreInsight	●	●	●
Employee Availability	Ability for employees to enter times/days to highlight their availability to be scheduled	●	●	●
Employee Profiles	Ability for employees to enter other scheduling attributes such as max/min hours per day, shifts per week etc.	●	●	●
Uncovered Shifts	Ability to retrieve unfilled shifts per week and fill these by running auto-roster, manually selecting employees based on a scoring system, or publish uncovered shifts out to employees to accept		●	●
Demand Templates	Ability to create employee demand templates for scheduling purposes		●	●
Shift Swaps	Ability for employees to swap shifts with other employees pending manager approval	○	●	●
Statistics	Ability for managers to view statistics based on employees scheduled vs. demand per week		●	●
Auto-Roster	Ability to automatically fill weekly rosters according to demand			●

Product features enabled per FlightPath package for XD Roster Management

Feature	Summary	FlightPath A	FlightPath B	FlightPath C
	templates, employee availability, and validation rules			
Attributes	Ability for managers to define specific tasks/roles per shift	○	●	●
Demand Generation	Ability to upload transactional data, e.g. footfall, in order to generate demand and create shifts			○
Live Exceptions	Ability to generate exceptions for real time clocking data affording managers the opportunity to address issues before EOD e.g. late in, early out			●
Planned/Actual Costs vs. Budget	Ability to upload budgets against a team as either hourly or monetary value and compare versus planned and actual hours worked		○	●
Split Rule	Ability to split un-filled shifts into shorter durations that can be filled			●
Qualifications	Ability to assign qualifications to employees to be used for auto-rostering and skill matching			●

○ Optional Extra

Implementation Services included in FlightPath for XD Roster Management				
		FlightPath A	FlightPath B	FlightPath C
Project Initiation Meeting	Your project Lead will contact you to familiarise you with the journey and XD Roster Management	●	●	●
Readiness Review	Your project lead will review the readiness tasks and support completion	●	●	●
Project Kick Off Meeting	An in-depth meeting to discuss project milestones, goals and governance			●
Regular Project Check In	Your Project Manager will make regular weekly calls throughout the project			●
Installation of your solution	We install your baseline solution	●	●	●
Roster Fundamentals	A half-day session focused on key concepts of Roster management and gathering of additional background build requirements		●	●
Scoping	We will scope changes you require in order to meet specific requirements of your business		●	●
Scoped requirement Build	We will complete any build we have scoped ensuring it has been smoke tested prior to your UAT.		●	●
Build Review Sessions	We will review the build with you and sign off the design pre-UAT	●	●	●
Employee Life Cycle Training	We will show how to manage the key processes within the solution via our full day training session	●	●	●
Profiles and Self Service	We will go through the menu sets used for employees and managers showing key processes deployed	●	●	●
Basic Administration	Provides an overview of the use of the administration features		●	●
Validation Support	We will assist you in validation of the XD Roster Management processes and functionality	●	●	●
Go Live Readiness	This session will highlight any outstanding actions you need to take to get your system live and provide you with a go live plan of action			●
Post Go Live Support	We will provide a weekly check in to review your progress following go live for a period of 1-week post go live			●

Additional Services available for XD

On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

Additional modules and apps overview training

Clocking Integration	Ability to integrate with a clocking provider via our web services capability
Public Holiday Hours Calculation	Ability to configure advanced payment rules for public holiday working within XD
Advanced Overtime and Premiums	Ability to configure advanced overtime and premium rules not included within the Roster Flight Path scope
Accrual Balances	Ability to configure accrual balances for time off in lieu and other accruals
Additional Pattern Groups	Ability to configure additional pattern groups for
Demand Generation	Ability to generate roster demand for scheduling from metrics such as sales or footfall

Additional related training

Advanced Report Training	XD Insight Advanced Report training for XD Roster Management only. Covering how to connect to tables, create basic listing reports with the ability to add parameters and filter accordingly
Advanced Administration Training	Additional advanced administrator training

Additional Services – Time and Materials basis

Configuration as a service	We will scope specific requirements you may have producing a configuration of requirements for the particular area of the system and then build to your signed off requirements
Report Writing	Following a confirmation of your reporting requirements we will create a bespoke Insight report
Additional User Training	We will provide generic additional user training for HR users of the system
Integration	We will scope your requirements for an integration determining the best delivery method producing a requirements document and building to meet these

Note: Access People XD additional modules and apps will require additional licence costs which should be discussed your Account Manager

**About The Access Group:**

The Access Group has been recognised in The Sunday Times Tech Track 100 in 2019 and is a leading provider of business software to mid-sized UK organisations. It helps more than 32,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of over £1billion, employs more than 2,300 staff.

For more information about The Access Group, visit: www.theaccessgroup.com

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