SECURESHEET Year 1	
Customer:	
Project:	
Start Date:	
Go-Live Date:	

Required	Status	Step		Description	Expected Timeframe	Team Member Responsibility	Additional Comments
		1.0	**Kick-off**	Client reviews their compensation planning business requirements with the SecureSheet team.	Week 1	Both	
		1.1	Planning timeline	Identify milestones including start date, testing start date, manager training date, system open date, lockout dates, statement distribution date, system freeze date.	Week 1	Client	
		1.2	Employee population	Describe employee population including size and geographic distribution.	Week 1	Client	
		1.3	Data update cycle	Discuss requirements for updating data while system is open to managers.	Week 1	Client	
		1.4	Administrators and key users	Identify system administrators on client side as well as any other key users or contacts.	Week 1	Client	
		2.0	**Review Excel Structure**	Client adds 5 columns to the left of the existing Excel file, reserved for SecureSheet processing. Client uploads Excel file(s) currently used to support compensation process to File Attachments section of SecureSheet site.	Week 1	Client	
		2.1	Validate initial file load in SecureSheet	SecureSheet loads initial Excel file.	Week 1	SecureSheet	
		3.0	**Set Up Working Model**	SecureSheet team uploads "Users-Views" SecureSheet for Client to define Views and UnLocked, Locked, and Hidden cells per view, and User Security.	Weeks 1 and 2	Both	
		3.1	Complete Users-Views Input	Import filled in "Users-Views".	Weeks 1 and 2	Client	
		3.2	Create SecureSheet working model	Create a working model based on "Users-Views" input for Client review.	Weeks 1 and 2	SecureSheet	
		3.3	Review working model	Client provides feedback on working model. Client and SecureSheet incorporate changes.	Weeks 1 and 2	Both	
		3.4	Review user list	Review user list, security and business process roles, and impersonation (if applicable).	Weeks 1 and 2	Client	
		3.5	Review submission process	Finalize submission timelines (lock dates on Views).	Weeks 1 and 2	Client	
		3.6	Review summary totals	Confirm format and calculations for summary totals in header rows.	Weeks 1 and 2	Client	
		4.0	**Single-Sign On setup (if required)**	SecureSheet provides SSO instructions, metadata file, and whitelist instructions. Client provides their metadata file with authentication certificate. SecureSheet and Client configure respective side and test.	Weeks 1 and 2	Client	
		5.0	**Compensation Statement design review**	Client provides sample Comp Statement(s) that support their end-of-cycle communication process. Review Statement(s) to ensure all data fields are on the main SecureSheet.	Week 1 or 2	Client	
		5.1	Compensation Statement(s) set up	SecureSheet team sets up Statement Template(s) and Views. Client fills in Statement map from main SecureSheet tab to the Statement Template(s).	Weeks 2, 3, and 4	Both	
		5.2	Review Compensation Statement(s)	Client reviews compensation statements for formatting and accuracy.	Weeks 3 and 4	Client	
		6.0	**On-line Review Meetings**	SecureSheet team hosts review meetings of the Working Model and the Compensation Statements, and transfers knowledge for testing phase.	Ongoing	Both	

7.0	**Client Testing**	Client validates user experience by impersonating different users based on role (e.g., Manager, Director, VP, ELT, HRBP) for the following: - views - security - formulas - summary totals - submission/approval process - statements	Weeks 2, 3 and 4	Client
7.1	SecureSheet updates	Iterative Client review. SecureSheet team makes necessary changes to support business process.	Weeks 2, 3 and 4	Both
8.0	**Identify Data Management Requirements**	SecureSheet team and client identify process to refresh data in the SecureSheet application. NOTE: For the audit trail in SecureSheet to track your changes in alignment with how you manage data: - Once you go live, after rows are added, if you plan to lock out users, export and resort data then reimport, tell SecureSheet Support so we can turn on the setting that will keep cell history aligned with the row unique ID (not the default which is the row number in excel).	Week 4	Both
8.1	Knowledge transfer to client	SecureSheet team transfers knowledge on import/export process to manage data and user changes.	Week 4, 5 or 6	Both
9.0	**Refresh Data (if required)**	Client provides/imports an Excel file in the same format as SecureSheet with the "go-live" data (if required).	Week 4, 5 or 6	Client
10.0	**Final Review and Sign-Off**	Client verifies that SecureSheet is complete to client specifications.	Week 4, 5 or 6	Client
11.0	**Training**	SecureSheet trains key client personnel. Client trains end users on SecureSheet. Client can use all Help content as source to modify for any specific end user instructions.	Typically one to two weeks prior to Go-Live	Client
12.0	**Go-Live**	Final data is loaded, any test data is cleared.	Go-Live date	Client
12.1	Final review and approval	Client reviews and approves SecureSheet is ready to be opened for users.	Go-Live date	Client
12.2	Activate SecureSheet for users	Client makes the SecureSheet "Active" and notifies users.	Go-Live date	Client
13.0	**Post Go-Live Support**	SecureSheet is available to help answer/resolve any issues after Go-Live.	Typically Go-Live date plus 1 or 2 weeks	SecureSheet
14.0	**Lock sheet/rows as required**	Lock out different levels as needed through the approval process.	As required	Client
15.0	**Reopen SecureSheet/Generate**	Reopen SecureSheet to various levels and generate statements (if required).	As required	Both
16.0	**Continuous Improvement**	Client identifies future revisions based on user feedback after Go-Live.	After Go-Live	Client
16.1	Project debrief	SecureSheet supports project debrief as desired to capture insights and lessons learned for future cycles.	Typically 3 weeks post Go-Live	Both

Team Member Responsibility	Status
SecureSheet	In Progress
Client	Complete
Both	