Sample Berkeley Monthly Milestones			
Month	HR/Payroll/Position Control	Finance	System/County

October	Position Control Setup
	  Salary Schedules
	  Position Types
	  Bargaining Units
	  Calendars
	
	Position Control Setup
	  Job Category/Classes
		Account Basics Training	Create System
			
			Planning Meeting
			  Plan training schedule
			  Identify import abilities
			  Identify features to implement
			  Identify core team meeting schedule
			  Identify support staff and training model
			
			  Set up Account Structure
			  Set up & Review Organization records
			  Plan Imports
			
			Import Account Components
			Import Accounts
			Import Locations for Orgs
			Import Salary Schedules
			
			Discuss Imports
			  Employees
			  Positions
			  Assignments
			  Employee Pay Cycles
			  Employee Retirement

November	Payroll Vendor Setup Training
	Position and Assignment Entry Training
	Import/Data Entry
	  Employees
	  Positions
	  Assignments
	  Employee Pay Cycles
	  Employee Retirement
	
	Complete Assignment Setup and Review
	
	Employee Mgt Activity Training
	Employee Mgt Maintenance Training
	
	Import
	  Employee Addons
	  Employee Tax Setup
	  Employee Deducts/Contribs
			Payroll setup Training
			  Deductions/Contributions
			  Pay Schedules/Pay Cycles
			  IOT Table, Dues Groups
			
			Payroll setup Training
			  Position Addons
			
			Discuss Imports
			  GL Transactions

Sample Berkeley Monthly Milestones			
Month	HR/Payroll/Position Control	Finance	System/County

December	Position Control Maintenance Training
	HW Benefit Setup Training
	
	Import Employee Benefits
	
	Employee Testing Complete
		Import Curr Yr Transactions
		  Original Budget
		  Revised Budget
		  Actuals to date
		
		Department Setup Training
		
		Account Testing Complete	

January	Pay Compare Training Health & Welfare Ben Mgt Training	Workflow Training Vendor Management Training Purchasing Training Fixed Assets Setup Training Fixed Asset Management Training	
February	Pay compares HRA Overview Training Benefit Testing Complete	AP Training Stores Warehouse Training Department Requisition Training Fiscal Basics Training Fixed Asset Testing Complete	Payroll setup Training Adjustment Addons
March	Pay compares Leave Setup Training Test Leave Granting	Budget Development Preparation Training Budget Development Overview Training Work Order Training Accounts Receivable Training Cash Receipts Training	Define YTD import Sample ACH file for setup Retirement Review Complete

April	Pay compares
	Test YTD import
	Employee Portal Overview
	Leave Management Training
	Payroll Adjustment Training
	
	Leave Testing Complete
	
	CASBO
		Budget Dev – Position Control
		Budget Dev – Non-positional
		AP Advanced Training
		Purchasing Advanced Training
		User Setup Revisited Training
		
		Work Order Testing Complete
		
		CASBO
			Test ACH file with Bank
			Testing Payroll Processing
			  Payroll Check Review/Approval
			
			Testing AP Processing
			  AP Check Review/Approval

Sample Berkeley Monthly Milestones			
Month	HR/Payroll/Position Control	Finance	System/County
June	Open Work Sessions Pay compares Employment Mgt Review Final Payroll Simulation Payroll Reports Training HRA Testing Complete Payroll Rpt Testing Complete Seniority Testing Complete Education Testing Complete Evaluation Testing Complete	Open Work Sessions Final AP Simulation Finance Reports Training AR Testing Complete AP Testing Complete Stores Testing Complete	

July	Final Imports
	   Leave balances, YTDs, ACH
	Test/Prenote ACH
	
	First Payroll in Escape
		Final Imports
		   JEs, Assets, Stores Items, 1099s
		
		First AP Checks in Escape	

Sept		Import Actuals for prior year Import Starting balances	