System Implementation Summary

Thank you for choosing TimeTrak®! We look forward to working closely with you over the coming weeks to implement your system. We strive to provide the best service possible while helping you realize the many benefits your new software provides you as it eases your workflow and payroll processes. *Your involvement is paramount for the successful implementation of your new TimeTrak system*. **We will be sending you weekly updates every Monday on the progress of your TimeTrak® implementation project that will include a PDF attachment of a Gantt chart.** The Gantt chart will initially show the optimum project schedule and each week will be updated to show actual progress. This summary will familiarize you with the implementation steps going forward.

Phase 1 - Welcome

Welcome Email – *Sent right after the order is placed*

This welcome email, you are receiving today, provides an overview of a traditional implementation giving you some concepts of what to expect over the next few months. Please place emphasis on getting your Welcome Call scheduled as soon as possible so we can get your implementation in process and completed as soon as possible.

Welcome Call – *Within the first week of order being placed*

Your welcome call will take about 30 minutes to complete depending on the complexity of your system. On the call will be your account representative and your system implementation specialist. The purpose of this call is to assure we understand and will be better able to meet your needs. To accomplish that we will discuss why you purchased the system and your expectations of what the system will provide you. After this initial discussion, we will review items needed for the initial configuration process. These items include your pay rules, how overtime is calculated, pay codes, schedules, etc. Please have your contact information for your IT person available for this call so we can later reach out to them to review resource requirements and answer any questions they may have. After the call, we will send you an email containing our **Implementation Survey**. This survey provides us with what we need to complete your initial dataset (the configuration specific to your company). Once all required information is received we will complete the dataset and then schedule the installation. (*Note: Providing necessary data and information in a timely matter will help ensure project deadlines are met*)

Phase 2 - Installation

Installation Call – *Prior to software installation*

Your TimeTrak Implementation Specialist will call your IT person to discuss system requirements before installation; and an appointment will be scheduled for software installation.

Installation – Software & Hardware – *After the dataset is complete*

Installation is usually done within a week after dataset completion, depending on your availability. The implementation specialist will establish an online session to work with your system. The dataset that was created for you that contains your employees, pay rules, etc. will be installed at that time. The installation specialist will also verify that TimeTrak is able to communicate with your clocks and provide instructions on enrolling employees at the clocks.

Phase 3 - Training

Please note that this is a general outline for training, and session scheduling is contingent upon your availability. Each session will last approximately one hour and will be held via an online meeting. Additional sessions will be added if needed. We will be available for questions if any arise between scheduled sessions.

First Session– Basic Usage **-** *Initial training will begin after installation*

At this point if you have not already enrolled the employees at the clock (biometrics) and/or have entered the badge numbers into the system, we will walk you through the process and/or send out a document on how to enroll at the clock for the biometric clocks. This first training session should be attended by your admin and HR people and will cover general use of TimeTrak®: how to log in, Password Maintenance (including adding other users and editing your password), adding employees, how to view employees' timecards and profiles, how to poll/apply punches, and how to download to the clock (when applicable). If not already checked during the installation, we will verify that punches are being received from the clock(s) and that you are able to view them. Once this is complete we will have you start a group of employees test punching. During this first week of use you will have the employees punch in and out, and then occasionally check in TimeTrak® that the punches are coming in. We strongly recommend using your old method of timekeeping during this period so you'll be able to verify that TimeTrak is correctly set up for your company; comparing TimeTrak's results with that of your old system.

Second Session – Time Card Editing - *After a few days, or toward the end of the pay period, of test punching*

This session should be attended by all TimeTrak users: administrators, HR, payroll, and lead supervisors, who will be expected to train all of your other supervisors. During this training session we will go through several timecards together and go over the basic time card editing methods and also go over how to change and edit schedules. We will additionally go over a few basic reports, primarily the Time Card Report and Approval Report. At this point we can cover any questions you may have after the first few days, or weeks, of using the system.

Third Session – Period Ending Procedures - *At the end of your test punching period*

This session should be attended by your admin and payroll people. During this session we cover the period end procedures, including preparing hours for payroll, setting the current pay period, creating the payroll interface file, testing the interface with your payroll system, and general period end maintenance. We will walk you through all the steps of closing out the period and producing your Hours for Payroll report. Again, we will cover any questions you may have.

Phase 4 - Final Steps

At this point, you have received enough training to perform an entire pay period of punching, time card editing, and period end procedures on your own. Your implementation specialist will be on standby the day of your payroll processing, should any problems arise. If during this period you have any questions or concerns you can contact your implementation specialist for assistance. If you feel you have numerous questions or problems, it might be best to document those issues for the implementation specialist so that an additional training/Q&A session can be scheduled. If you have purchased additional modules, such as HisTrak®, SchedTrak®, or OmniTrak®, additional setup and training sessions will be scheduled throughout the implementation process.

Last Phase - Final Q&A Call and Handoff to Support – *After all training is complete*

We will schedule a final conference call with you, our customer advocate, and your implementation specialist/trainer. At this time you can bring up any remaining questions you may have and we will give you an opportunity to provide feedback on your system implementation. You will then have completed the basic system implementation phase and are ready to move on to our support team with many more people available in order to respond to you more promptly to provide continued service. We will discuss availability and best ways to contact the support team.