Pilot Trial

Best practise to get started with TimeLog Project

What's included

TimeLog Project Account

TimeLog will set up an account for your organistation.

During the Pilot Trial you may use the account as you like to determine if TimeLog Project is right for you.

After the Pilot Trial you can either choose to keep the data you have provided during the Pilot Trial or have the data deleted and start from fresh.

Basic System Configuration

TimeLog Project includes many settings and preferences and during the Pilot Trial TimeLog will help you configure the system to reflect your organisation's workflow processes.

Online Introduction

A Pilot Trial typically includes a 3 hour introduction, depending on your prior experiences with project management IT systems.

The price of the introduction is € 499,–

Help and Support

During and after the Pilot Trial TimeLog offers to help you to:

- Refine and tune system settings and preferences.
- Identify possible problems before the implementation process.
- Create a full scale roll-out plan.

TimeLog offers a Pilot Trial as a guided process for system configuration, user training, and workflow implementation. We will assist you to quickly set up a realistic environment and test if TimeLog Project supports the desired workflow and delivers the required and expected value.

Pick Your Team

You need members for two types of teams: An Operational Team and a Test Team. Both teams should represent typical roles in your company.

The Operational Team's tasks are to drive the process, make strategic decisions, and participate in the introduction. This team should have members from management (e.g. CEO or VP), finance (e.g. CFO or bookkeeper), operations (e.g. COO or senior project manager(s)).

The Test Team will use TimeLog Project in their daily work for time tracking, expense reporting, project management, billing, reporting, etc. This team should consist of project managers and employees, and should include members of the Operational Team. The Test Team's tasks are to deliver data and evaluate the usage of TimeLog Project.

What Are Your Requirements?

Write a requirement specification and send it to TimeLog. This is a job for the Operational Team.

Describe your requirements as workflow use cases in statements such as "Project managers should authorize timesheets", "Line managers should authorize the department's time & material", etc.

A requirement specification helps you and TimeLog configure TimeLog Project for your workflow. It can also be used to determine whether or not you will need add-on modules for TimeLog Project.

Prepare Data – Make Lists

Preferably you should choose to work with projects, you are about to start, or projects you have recently started.

Make a list of 3-5 project for this purpose. Include a list of typical tasks or activities into which a project can be subdivided.

Make another list of 3-5 customers and contacts associated with these projects.

Also, make lists of the hourly rates you normally charge and the cost rates of various employee types. This information will be used for billing and reports.

Setting a Date for The Introduction

With teams, requirements and data in place, it is time for an introduction.

Contact TimeLog and schedule a date and time for the introduction.

The introduction will focus on setting up parameters and configuring TimeLog Project for your workflow. This involves the active participation of the Operational Team, as their experience of your current business processes is crucial in order to succeed.

> Success in business requires training and discipline and hard work. But if you're not frightened by these things, the opportunities are just as great today as they ever were.
>
> – David Rockefeller

After this you will be ready to:

- Add employees.
- Add customers and contacts.
- Create projects and understand project management, including project budgets, resource allocation, etc.
- Work with time management, including time tracking, approval, work load calculation, etc.
- Work with cost management, including expense tracking, mileage, etc.
- Bill and produce a final invoice.
  Analyze data, an introduction to the most common reports.

Keep It Real

During the Pilot Trial period you should track time, manage projects and bill customers simultaneously both in your existing system(s) and in TimeLog Project.

Though keeping double records may seem tedious and time consuming, it will provide you with all the necessary data and help you determine if TimeLog Project delivers on its promise and ROI.

Tune In

As you begin to use TimeLog Project, new questions and insights will appear as a natural consequence of your newly gained experience.

TimeLog will assist you in this process and answer your questions and help you tackle possible obstacles.

Sometimes a finetuning of the configuration is needed to accurately portray and support your workflow and business processes.

After the Pilot Trial period it is time to evaluate your experience with TimeLog Project and make the last refinements before planning a full-scale roll-out.

Checklist

Complete the steps below to ensure a successful Pilot Trial of TimeLog Project:

Teams

- ☐ Set up an Operational Team. (2-3 persons)
- ☐ Pick a Test Team. (3-5 persons).

Requirements

- ☐ Specify your requirements, e.g. in the form of use cases.
- ☐ Consider which extensions to TimeLog Project you would like to try out.
- ☐ Send your requirements to TimeLog.

Data Lists

- ☐ Make a list of 3-5 projects for the Pilot Trial.
- ☐ Make a list of tasks/activities for the projects.
- ☐ Make a list of customers and contacts for the projects.
- ☐ Make a list of hourly rates for the projects.
- ☐ Make a list of cost rates for employee types.
- ☐ Send the lists to TimeLog.

Introduction

- ☐ Arrange date and time with TimeLog for your introduction.

Evaluate

- ☐ Plan for full-scale implementation.