

## Tractivity Implementation Guide

Every Tractivity implementation is unique. The flexibility of the solution requires planning and strategy decisions which will guide the implementation process.

### Time & Payroll Module

#### *What to track:*

The information captured from time tracking breaks down into two main parts: Who the work is for, the customer and job that they are currently working on, and what the employee is working on, the specific work activity they are performing, such as cutting, assembly, fabricating etc. The customer/job may also be broken down further to include a phase or other breakdowns for the job.

#### *Jobs*

Jobs are identified with a job code or a number and description. Whenever an employee is clocking into a job, the job codes and descriptions will appear together. The description is intended to be non-ambiguous, so employees may easily select the correct job. A decision must be made regarding the number of digits to be used for the job code and whether the code will be strictly numeric (recommended) or alpha-numeric.

- Job Identity – number of digits
- Numeric or Alpha-numeric

#### *Job Phases*

Jobs may also include a sub job (phase, work order, item, area etc.) which further breaks down the job. The job caption text used for phases is customizable to match your company's language. Like jobs, job phases are always presented with the phase code and the description together for easy identification.

- Track by job phase or not
- Nomenclature for the "sub job" (phase, room, etc.)
- Number of digits for sub job

#### *Labor Activity*

The activities consist of an activity code and a description. A decision will need to be made regarding the number of digits to be used for the activity code.

A master activity list will need to be determined, which will provide the ability to capture labor activity to the desired level. Activities are further organized into groups.

- Number of digits for Activity Code
- Activity groups
- Activities list

### *Time punch Rules*

Consider if early or late punches will be adjusted to comply with standard starting and stopping times. Consider if tardy will be tracked.

- Early clock in rule
- Late clock in rule
- Early clock out rule
- Late clock out rule
- Tardy policies

### *Payroll Rules*

It is necessary to identify the rules that modify each type of employee's pay, such as overtime.

- Payroll rules for determining Regular and OT pay
- Pay type categories (Regular, OT, OT2, Sick, Vacation, Holiday, Other)

### *Payroll*

Payroll output requirements will determine the set up requirements. In some cases, the break down for employee payroll hours may only need to be by regular and overtime pay. In other situations it may be necessary to break down employee payroll hours by different pay types based upon the activity the employee was doing, the county they were working in, and the type of job they were working on, etc. Any special requirement for reporting payroll information needs to be identified, as this will impact other configuration choices.

- External payroll system requirements
- QuickBooks
- CSV export file
- Report

### *Information Sources*

Identify information presently in electronic form that may be importable thus avoiding manual data entry

- Customers
- Jobs
- Employees

## Inventory & Materials Module

### *Material Identity*

Consider how material items are identified (part number). Do all instances of material items have the same identity? For example, do QuickBooks and Cabinet Vision have the same part name?

- Material list with unique part numbers
- Identify applicable alias names
- Categories
- Subcategories

- Inventory vs. non-inventory
- Suppliers and supplier SKUs
- Price
- Cost
- Quantity on hand

#### *Information Source(s)*

Ideally, material items may be imported from a computer readable source. Consider the source of material items and supplier/vendors, e.g., spreadsheets, QuickBooks, Cabinet Visio, and others.

## Scheduling Module

### *Configure Activities*

- All scheduled activities will require a default routing sequence assignment.
- A minimum and maximum number of employees to which the activity can be assigned may be set for the day or entire job.
- Activities that require associated equipment will need to be identified along with the equipment they require.

### *Configure Employee Resources*

- Employee's daily schedules will determine the availability of the employee resource.
- Holiday schedules will need to be defined.
- Planned absences will need to be defined.
- Employee qualifications will need to be assigned, creating a list of activities each employee can perform.

### *Job Labor Budgets*

- All scheduled jobs will require a detailed labor budget

### *Progress Management*

- A method for obtaining job progress feedback will to be determined. Consider data capture entry from employees or job progress adjustment from management using TracManager.

## Estimating Module

### *Product List*

- A Product list for the "top level" catalog items will be defined.
- Organize products into groups having the same feature and option names and choices
- A pricing strategy for determining product and feature pricing (by the unit, by the linear foot, formula etc.)

### *Features List*

- A list of feature names that will modify products
- A list of feature choices for each feature name

- A pricing strategy for determining feature pricing (by the unit, by the linear foot, formula etc.)

*Options List*

- A list of options that will be added to product
- A list of option choices for each option name
- A pricing strategy for determining feature pricing (by the unit, by the linear foot, formula etc.)

## Job Cost & Analysis Module

*Job Budgets*

A method for creating the job labor and material budgets will be determined. This method may consist of importing a spreadsheet, referencing a template, converting an estimate to an order, an import from Cabinet Vision, etc.

*Reports*

- Job Cost reports
- Budget Variance Reports
- Material Usage
- Timesheets
- HR

## Training

*Users*

Users will be trained to perform the role(s) that apply to their function via a step-by-step process of “how to” operations.

*Administrator*

The administrator training will include the setup and configuration procedures and will also involve step-by-step processes along with all other user training.

## Administration

Assign an individual to be the single point of contact for the implementation process.

Identify IT related tasks and assign as appropriate.

Establish a roll-out priority with small phases that are easily achieved.