

TiM[®] Time Management



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OVERVIEW

Objectives

Actively participating during this chapter helps you:

- Understand the objectives of the TiM Time Tracking system.
- Understand the differences and benefits of the TiM Time Tracking system compared to other methods.
- Understand the flow of time from capture to posting to a financial system.

Introduction

This section presents a basic overview of the features of the TiM Time Tracking system and how to successfully use TiM in your day to more time, and capture time more accurately.

The principals and methods of TiM time capture result in more time captured and more accuracy in your time capture, but most important, TiM tracking is simple. So simple that time tracking is no longer a chore.

With TiM, instead of creating your time entries at the end of the week or month, you will be able to submit your time on a daily basis.

The flow of data through the entire system is also explained from capture to client invoice.

TiM Time Capture Goals

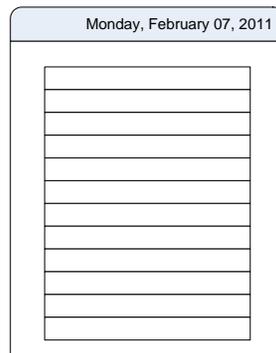
TiM is designed to make it easier to capture time, capture more time, and post that time directly to Microsoft Dynamics 365.

TiM is also designed to streamline the entire process of time capture to invoice delivery resulting in increased revenues for the firm. This is the “TiM Effect”™

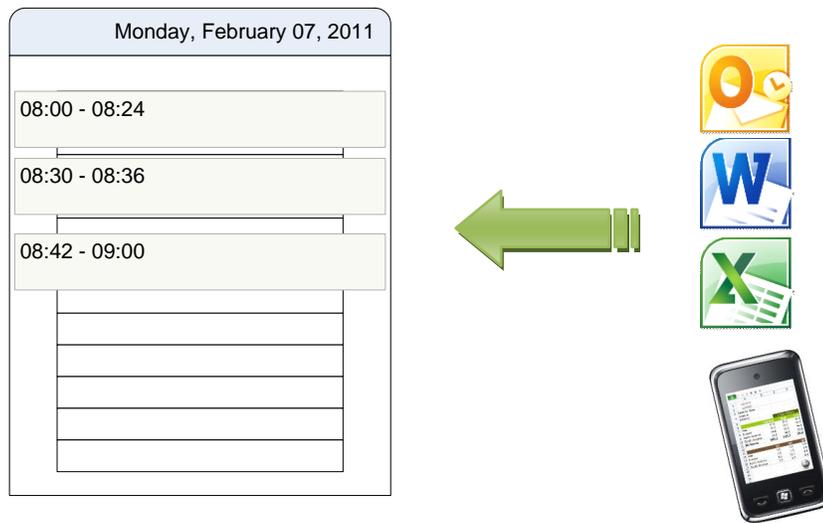
TiM Time Capture Methodology

Timesheets do not work! The concept of a timesheet is a grid goes against how we envision time and how we plan our days. Being asked to record our time in a grid based timesheet is one of the reasons nobody likes doing their time. Additionally, technology has not been the answer to this problem. Every other solution given to us to record our time is another version of a paper timesheet. We are given the instructions, Just fill it in!

TiM is different! TiM is more than software; TiM is also a methodology. TiM’s is based on how we plan our day using the Microsoft Outlook calendar. If we use the calendar format to plan our day, why not use the calendar format to record our day.



The calendar represents the time available in the day. The grid lines represent time increments throughout the day. With TiM, different time events, either manual or automatic, are placed into the calendar in the form of events to fill in the day. This is called Visual Time Tracking.

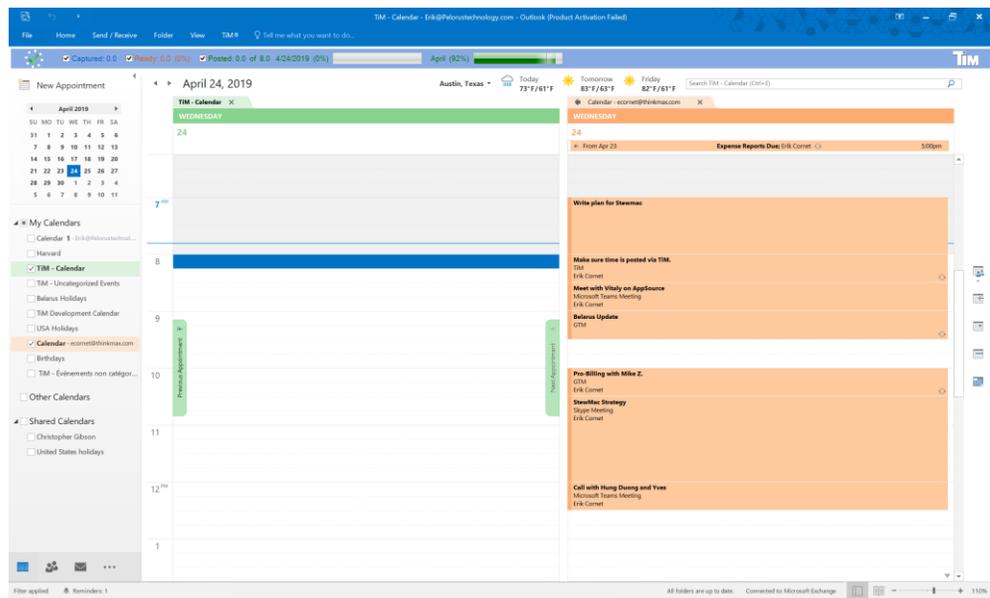


Each calendar event contains the duration of the event and other information such as categories, other classifications, and event notes.

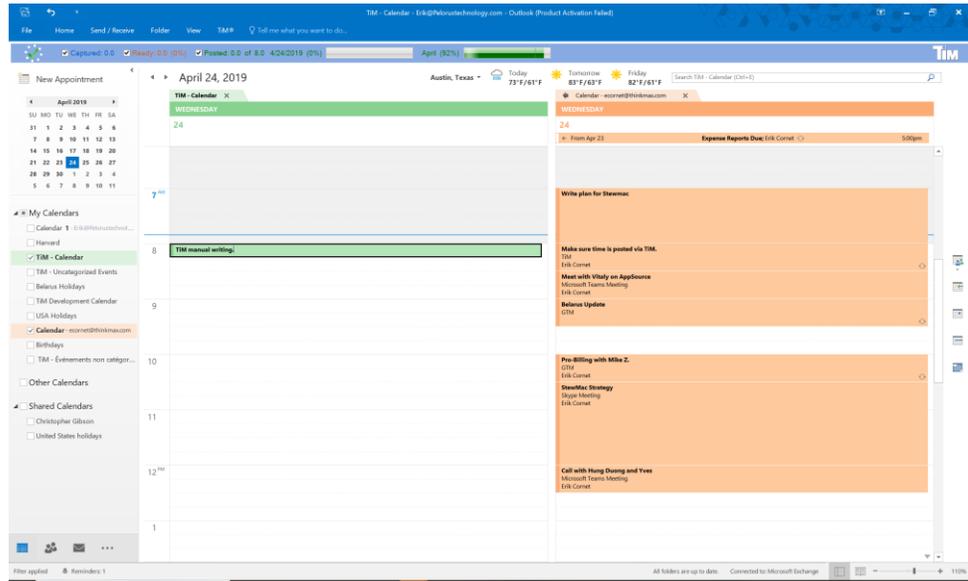
The Easiest Time Entry

The easiest way to gain the advantages of the TiM system is the manual calendar time entry. With 3 mouse clicks, a time entry is created; with another mouse click the entry is posted to your financial system. Time tracking with TiM is so simple there is no reason not to do your time daily, or all throughout the day. These are the steps to create a manual calendar entry.

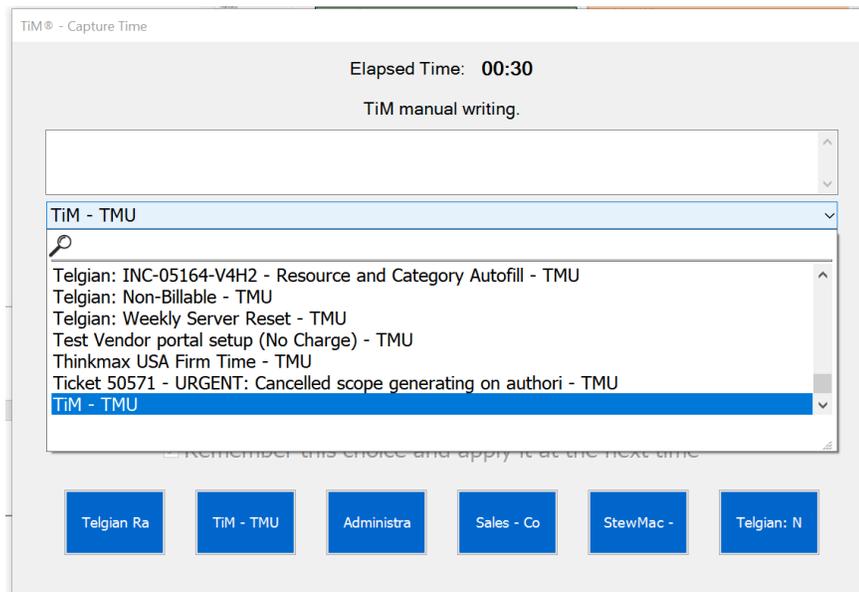
On your Microsoft Outlook Calendar, click into the TiM calendar on the time that you would like to record an event. Type the notes about what you did at that time and press enter.



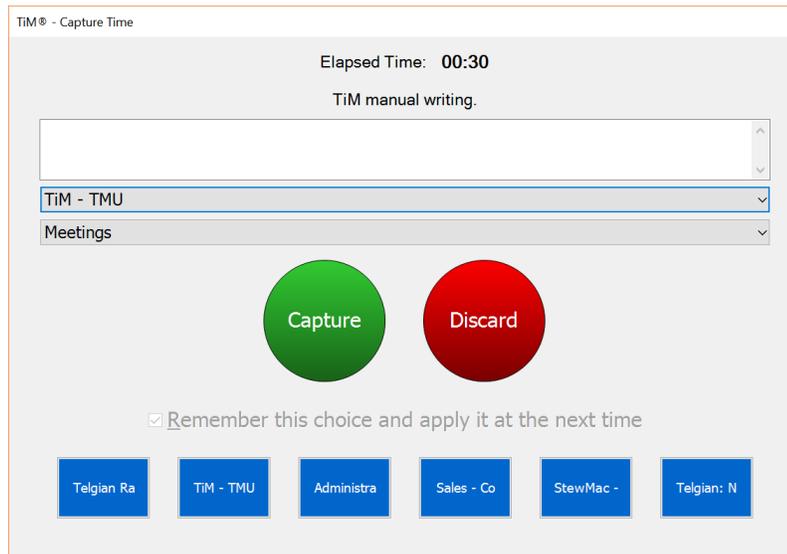
In this example, “TiM manual writing” is entered at 8:00 AM.



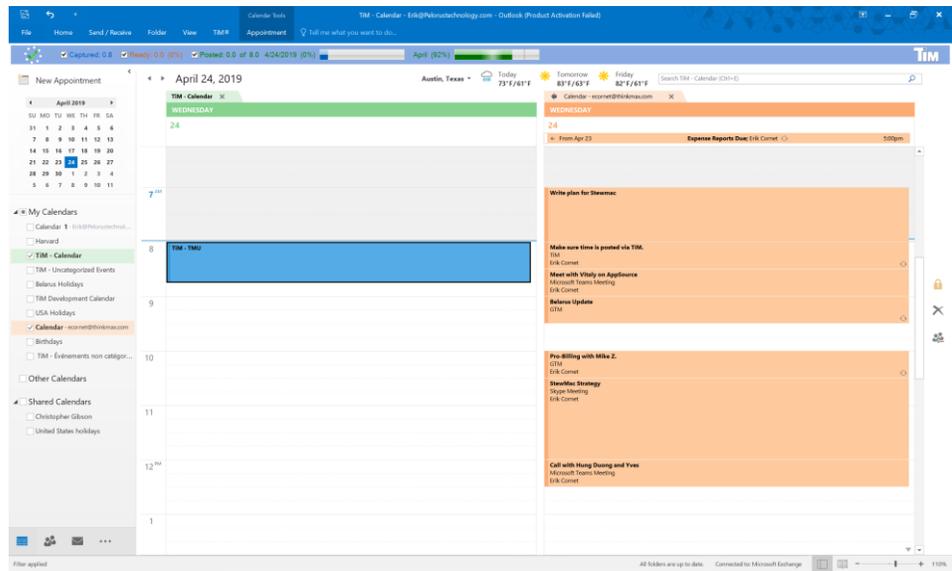
Upon pressing enter, the TiM project pop-up is displayed. Select the project to associate with this time entry by using the drop-down box or pre-set button.



Click on the green capture circle to save the time entry.

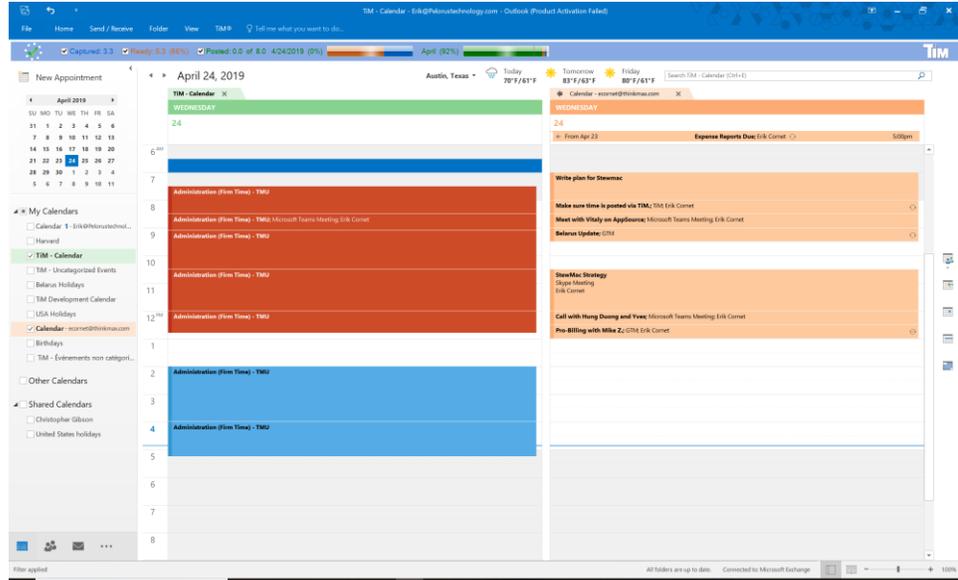


Drag the newly created project time box to fill the amount of time consumed by the time event on the calendar. In this example the project box consumes from 8:00 AM to 8:45 AM.



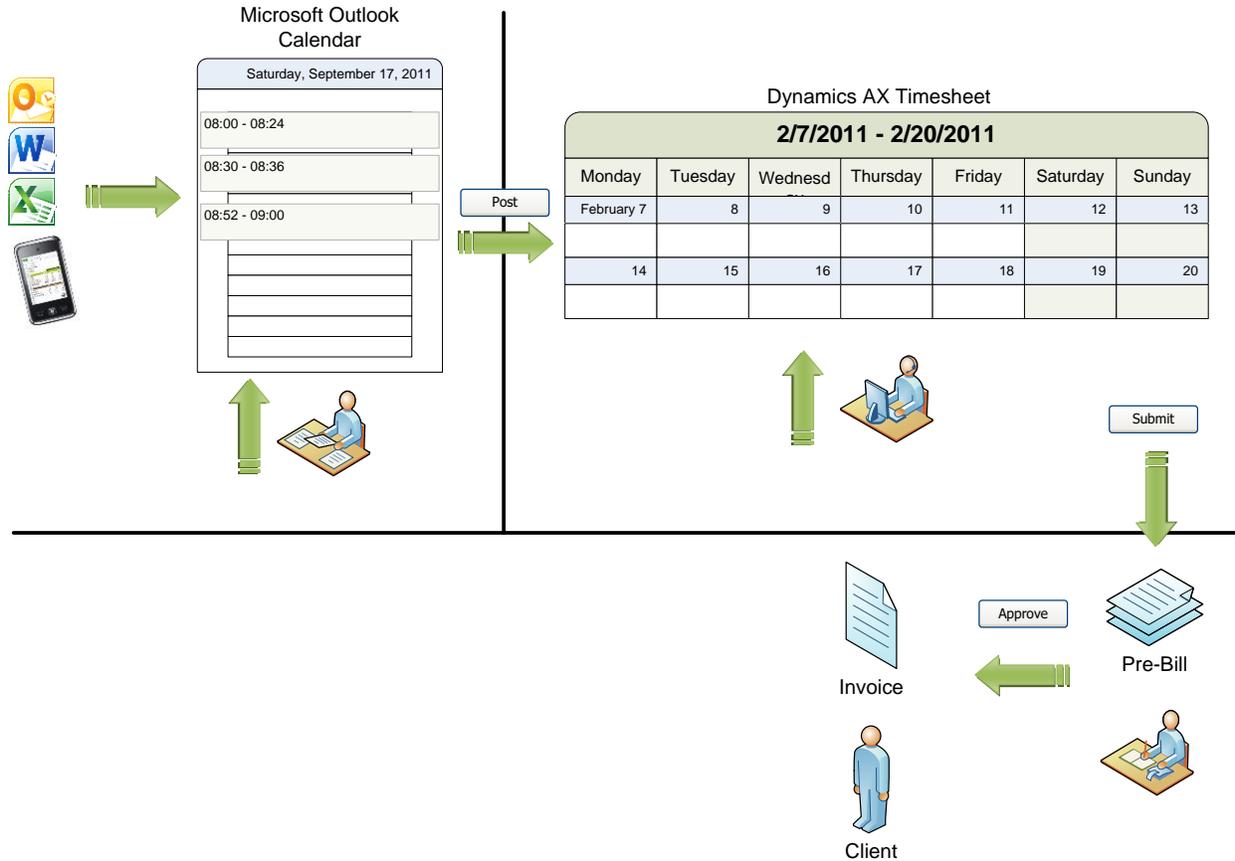
The time entry is completed.

Filling in the day with project boxes creates a more complete representation of how you spent your day, and results in greater time capture. Most importantly, it's easy.



Time Data Flow

Below is the flow of time data through the system from capture to client invoice.



1. Time capture starts in MS-Outlook where the timekeeper can use the automatic or manual methods to record time. The time events are only visible to the time keeper or anyone who is authorized to view the timekeeper's calendar. Add / Change / Delete can take place on the calendar.
2. Posting the events from the MS-Outlook calendar sends the time event to the timekeeper's timesheet in Dynamics 365 (D365). The timekeeper, timekeeper's admin (if authorized), or the project manager can Add / Change / Delete entries on the timesheet.

3. Submitting timesheets in D365 moves the entire timesheet to the associated projects where client invoices are generated.

Best practice tip: Have the project manager submit the timesheets in D365. This allows the timekeepers to stay focused on client facing activities.

Conclusion

With the TiM methodology of time capture you are able to capture more time without having to do more work to capture that time. Additionally, the time events are converted into timesheet entries automatically through posting. This direct posting from Outlook reduces errors and creates efficiencies by eliminating transcribing of handwritten notes and sends these events directly to the financial system.

Test Your Knowledge – Overview

What are the current methods of time capture currently used at your firm and how do they compare to the TiM methodology?

How can you use utilize Visual Time Tracking to keep better track of time?

What is the minimum number of mouse clicks does it take to create a time entry?

Quick Interaction: Lessons Learned

Take a moment and write down three Key Points you have learned from this chapter:

1.

2.

3.
