



# Migrating to the New Replicon Platform

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A guide for migrating to a  
new generation of solutions

At Replicon, we are all about empowering our customers to capture time quickly and accurately for any business need. Our latest release is a single, scalable platform designed to give you unrivaled capabilities to track and analyze time.

In addition to enhancing our entire platform and the products you use today, we are introducing four new solutions that provide greater visibility and comprehensive capabilities to improve productivity.

### Professional Services

- ▶ Maximize billable revenue
- ▶ Streamline time capture
- ▶ Allocate resources efficiently
- ▶ Improve revenue forecasts

### Projects & Programs

- ▶ Track project time and costs
- ▶ Deliver on-time, on-budget
- ▶ Optimize resource use
- ▶ Improve investment planning

### Time & Attendance

- ▶ Streamline payroll
- ▶ Eliminate time theft
- ▶ Track time off and overtime
- ▶ Reduce labor compliance risk

### Shared Services

- ▶ Realize economies of scale
- ▶ Detail chargebacks
- ▶ Plan resource demand
- ▶ Insight into service requests

### Gen3 will give you and your employees

- ▶ Improved user experience
- ▶ In context analytics
- ▶ Resource management
- ▶ Superior project execution
- ▶ Streamlined payroll management
- ▶ Enhanced full feature mobile platform



## Professional Services Management

### Advanced analytics

- ▶ By user, by role, by process

### Client management

- ▶ Client Management workflow and dashboards—including reporting on all historical data, analytics for client profitability and project pipeline, and insight into agreed billing rates

### Practice management

- ▶ Insight into profitability, costs, and billing patterns by practice, as well as drill down to client and project

### Resource management

- ▶ Patent pending embedded resource management functionality with seamless integration to timesheets
- ▶ Embedded workflow to find and assign resources based on availability and skill set
- ▶ Better forecasting through “place holder” resource allocations and capacity planning

### Project management

- ▶ Superior usability with simplified task management, full billing rates management, and project dashboards & analytics
- ▶ Ability to create and manage fixed bid and time and materials projects

### Billing management

- ▶ Visibility into billable hours & dollars from analytics and time and expense monitoring

## Absence Management (TimeOff)

### Improved process control

- ▶ Approvals paths tied to the time off types (Sick, PTO, Company Holidays, etc.)
- ▶ Interactive calendar UI and expanded calendar views with the ability to add departments, direct reports, and outside users
- ▶ Booking time off for others

### Improved reporting and analytics

- ▶ Time off balance & accrual data all reported in main UI
- ▶ Out-of-the-box accrual report template
- ▶ Improved self-service with real-time access to balances, usage, and accruals with no need to run reports
- ▶ More intelligent time off requests and approvals—users and supervisors get time off usage history that helps them process time off requests

## Project and Program Management

### Compliance and reporting

- ▶ Cost Capitalization
- ▶ Hours & Cost Normalization

### Program management

- ▶ Understand at a summary level the performance of the entire project portfolio with the ability to track multiple projects rolling up into wider programs and initiatives
- ▶ Analyze costs and hours for each program and initiative

### Resource management

- ▶ Patent pending embedded resource management functionality with seamless integration to timesheets (including timesheet pre-population functionality)
- ▶ Embedded workflow to find and assign resources based on availability and skill set
- ▶ Better forecasting through “place holder” resource allocations and capacity planning

### Project management

- ▶ Enhanced Project Management provides superior usability with simplified task management and project dashboards and analytics

## Time and Attendance Management

### Usability

- ▶ We have put historical timesheet reporting into the hands of all users, not just administrators, ensuring that everyone can understand where their time has been allocated in the past and make decisions going forward
- ▶ Single, easy-to-use format for all “in and out” time tracking
- ▶ New intuitive time tracking interface based on permissions and user role

### Process control

- ▶ We have built a new cross-platform approval screen that allows supervisors the flexibility to manage the workflow for all time tracking processes
- ▶ All payroll processes can now be accessed through a payroll tab—making the critical month end financial tasks easily managed and controlled all in one console

### New features

- ▶ Premium Pay, Crew Timesheet, Day Timesheet, Paycodes on Timesheets, Multiple Daily Rates, and Timesheets Locked during payroll processing

## About Replicon

Replicon is the leading provider of cloud time tracking applications. We provide unprecedented visibility into time, resource, and project data along with embedded reporting for real-time analytics. Replicon helps customers reduce compliance risk, keep costs down, and provide greater insight into business performance.

Replicon's award-winning products are delivered 100% in the cloud on a single platform. They are simple and hassle-free to trial, buy, deploy, and use. Replicon is a global company with employees in Australia, Canada, India, UK, and US.

## Join Us

We look forward to welcoming you to our first annual Replicon user conference May 12-15, 2014 in San Francisco.

### To try out Gen3 go to:

[www.replicon.com/free-trial](http://www.replicon.com/free-trial)

### Contact Us

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## Preparing to Upgrade

- ▶ Try out the Gen3 Trial to familiarize yourself with the new features and changes. To set up a trial, visit our website: [www.replicon.com](http://www.replicon.com)
- ▶ When you are ready to upgrade contact your Account Manager

## During the Upgrade



- ▶ You will have a dedicated Implementation Representative working directly with you in the process of migrating
- ▶ Migration of existing Gen2 meta data, system settings, existing projects with their associated tasks, clients with their associated projects, historical timesheets, historical expenses, historical time offs, and migration of resource allocations
- ▶ Re-build of integrations to third party applications and re-build imports in Gen3

During the upgrade, your Replicon system will be disabled for a short time to prevent users from making changes during the upgrade.

## After the Upgrade

After upgrading, your users can login at the same location as before: [login.replicon.com](http://login.replicon.com). Their **User Name** and **Password** will remain the same.