Manager’s Getting Started Guide

This guide describes tasks that only employees with manager or administrator status are authorized to perform.

Time Management

Note: Although all ways of entering and editing hours are shown below, you’ll probably develop your favorites.

How to Enter Employee Hours Using:

- Timesheets List
- Manual Time Card
- Time Slider
- Who's Working

Timesheets List

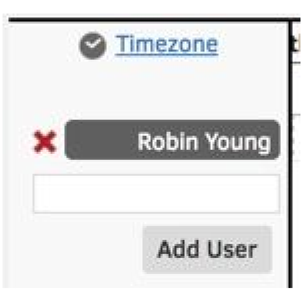
1. Go to **TRACK** › **Time Entries** › **Timesheets List** tab › **Add Time.** The Timesheet Editor displays.
2. Enter the employee's name.
3. If the employee is still working, check the **Currently working** box.
4. Enter the dates and times, and select **Save.** The new timesheet displays at the top of Timesheet List.

Manual Time Card

1. Go to **TRACK** › **Time Entries** › **Manual Time Card.**
2. Select the date range.
3. If you are entering hours worked for someone else, at the top right, click **Switch User**, and enter a name.
4. If you track time against a job or customer, click **(no job)** or **(no customer)**, and select from the list.
5. Click inside the cell to enter the number of hours worked. (For example, to enter 8 1/2 hours, type 8.5 or 8:30.)
6. If you'd like to, in the **Notes** box below, enter your notes for that day.
7. Continue adding hours and notes to each day.
8. Before proceeding to a new week, click **Save.**

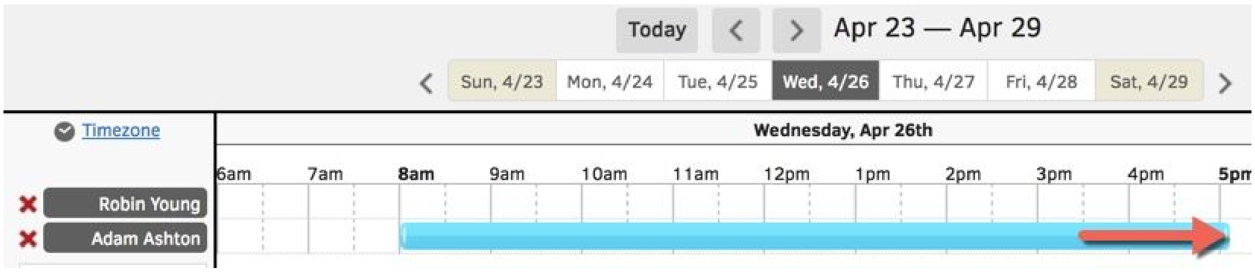
Time Slider

1. Go to **TRACK** › **Time Entries** › **Time Slider** tab.
2. Below Timezone, enter the employee's name, and click **Add User**.



3. At the top right, select the date the employee worked.

4. Click the clock-in time, hold and drag the bar to the clock-out time, and release.

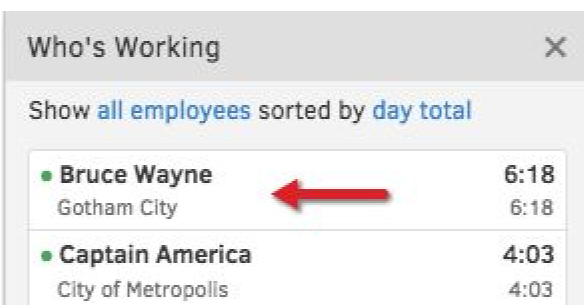


The Timesheet Editor displays.

5. If necessary, adjust the displayed clock-in and clock-out times, and fill in the required fields.
6. If the employee is still working, select **Currently working**.
7. Click **Save**. The new timesheet displays at the top of Timesheet List.

Who's Working

1. From the **Who's Working** window, select an employee.



The timesheet editor displays.

2. If necessary, adjust the displayed clock-in and clock-out times, and fill in the required fields.
3. If the employee is still working, select **Currently working**.
4. Click **Save**. The new timesheet displays at the top of Timesheet List.

How to Edit or Delete Employee Hours From:

- Timesheets List
- Who's Working
- An Approvals or a Payroll Report

Timesheets List

1. Depending on which is displayed, do one of the following:

    - Go to **MANAGE** › **Timesheets** › **Timesheets List**.
    - Go to **TRACK** › **Time Entries** › **Timesheets List**.

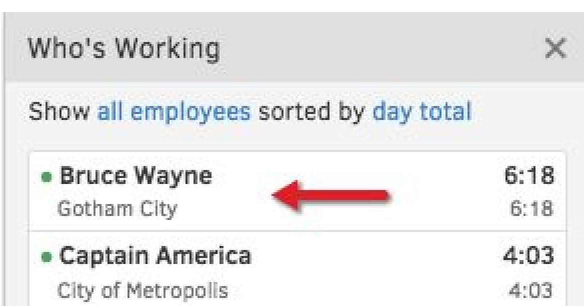
2. To edit the timesheet:

    - At the right of the timesheet, click the pencil icon ( ). The Timesheet Editor displays.
    - Make the edits, and click **Save**.

3. To delete the timesheet: Click the red **X**.

Who’s Working

1. From the **Who's Working** window, select an employee who is currently working (has a green dot next to their name.)

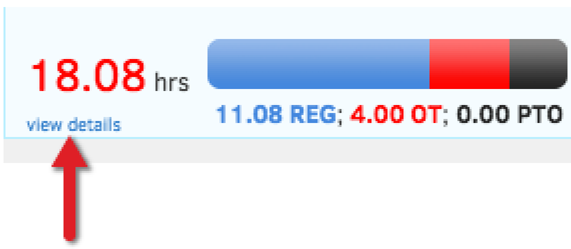


   The timesheet editor displays.

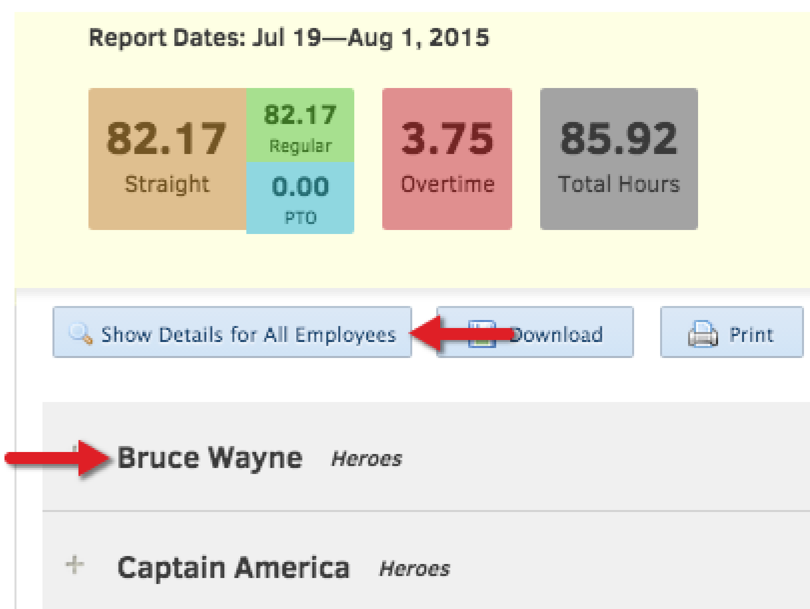
2. Edit the information, and click **Save**.

An Approvals or a Payroll Report

1. Go to **REPORT** › **Approvals Report** or **Payroll Report**.
2. Enter the report filters (report dates, employee, etc.), and click **Run Report**. The report window displays an overview of employee hours worked.
3. Open the detailed view:
   - From the approvals report, click **view details**.



   - From the payroll report, click either **Show Details for All Employees**, or click an individual name.



4. Hover the cursor over an individual time entry.
5. At the left, click the appropriate icon next to the timesheet.
   - To edit the entry, click , make the changes, and click **Save**.
   - To delete the entry, click .

Paid Time Off (PTO)

Note: PTO hours include sick days, vacation time, annual leave, and personal leave. Holidays are tracked separately.

How to Enter PTO for One Employee

1. Go to **TRACK** › **Paid Time Off (PTO)**.
2. Enter the employee's name, and click **Switch User**.
3. From the drop-down, select the PTO code(s).
4. Enter the hours, and click **Save**.

How to Enter PTO for Multiple Employees

1. Go to **TRACK** › **Paid Time Off (PTO)**.
2. Click **Switch to multi-user entry mode** › **all employees**.
3. From the Select Employees/Groups pop-up, choose groups and/or individual employees, and click **Ok**
4. From the drop-down, select the PTO code(s), and enter the hours.
5. Do one of the following:
   - To add hours to previously entered PTO: Click **Append**.
   - To change the entered hours: Click **Replace**.
6. Click **Go**.

Work Hour Approvals

How to Approve Employee Hours

1. Go to **REPORT** › **Approvals Report**.
2. Select the report dates, employees, and click **Run Report**.
3. Select either **Check all unapproved**, or select individuals employees.
4. Click **Approve Selected Users**.

How to Unapprove or Reject Employee Hours

1. Go to **REPORT** › **Approvals Report**.
2. Select the report dates, employees, and click **Run Report**.
3. To unlock the employee's timesheet, click **Unapprove**.
4. To reject it, click **Reject**.
5. Enter the reason for the rejection, and click **Send**.

Reports

How to Run a Report

1. Click **REPORT**.
2. Select the report type (Approvals, Payroll, etc.)
3. Select the report dates, employee(s), etc.
4. Click **Run Report** or **Download CSV**, depending on the report type.