PART 3:

ClickTime Time Entry Settings

Set up your Company-wide Time Entry settings

ClickTime

Last updated in Feb 2016

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ClickTime Basics

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General Company Information

The first two sections of the Company Preferences page will allow you set up your General Company Information and Timesheet model. These fields can be modified at any time, but will likely only need to be set up once.

Now that you've set up your options for time entry and started tracking time, let's make sure that your general settings correctly match your business model (ClickTime his highly customizable to fit a variety of business models. This guide will help you make sure your ClickTime account is configured to your specific needs).

The Company Preferences page can be found when you are in the Company Section of your ClickTime account. These features can only be accessed by local ClickTime Administrators.
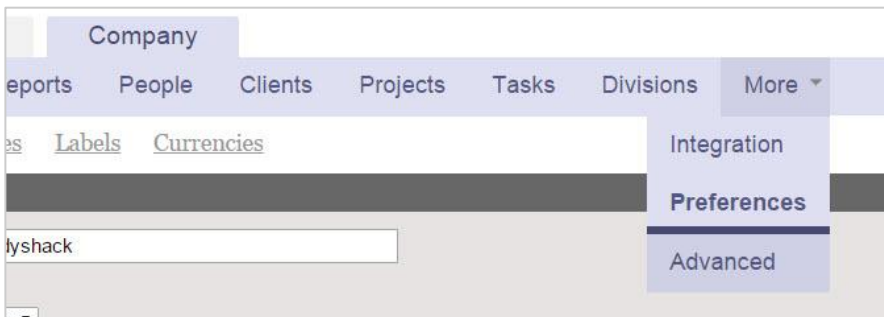
If you do not see the Preferences option, click "More" to see the rest of your choices, then select "Preferences".

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General Company Information

Company name is the name in our database. This will default to whatever you initially signed up with. Below is your unique Account Number. This information can be useful to identify yourself if you are discussing with any ClickTime staff.

Next, confirm that your date setting is correct, and then select your preferred currency. If you don't see your currency listed, please let our Support Team know so we can add it!

1. If you'd like to tell us which Accounting and Payroll applications you use, as well as the name of your checking account, that information will be useful as we look into future integrations. Note that if you use QuickBooks for accounting, you'll get a helpful link to download our QuickBooks Connector files.

2. Here are the options to enable our billing features and estimation features. If you have any questions about using these, please contact our Support Team. We'll be creating other documentation around these functions in the near future too.

3. If you need to update your Invoicing Method, Billing Contact Information, or Payment Method details, click the link here to be taken to the appropriate page.

Next you can set up your general **Timesheet and Expenses Information**.

ClickTime

Timesheet and Expense Information

First, choose the time increment you'd like to use for your timesheets. ClickTime supports the following increments:

- 1/10 hour (every 6 minutes)
- 1/4 hour (every 15 minutes)
- 1/2 hour (every 30 minutes)
- hourly (every 60 minutes)

ClickTime will round all time entries up or down to the nearest interval based on this rule.

Below is the Company Lock Date. ClickTime will not allow any users to enter time entries before this date. It defaults to 1971, but you can update this at any time if you want to prevent your employees from creating new time entries in the past.

If you are a demo account with a government contract and need to be compliant with the Defense Contract Audit Agency (DCAA), please contact our Sales Team to enable the feature. If you are a current ClickTime customer who needs to start being compliant with DCAA guidelines, please reach out to our Support Team for more details.

Timesheet and Expense Information

mileage unit: miles (mi) ▼

notify this person when an expense sheet is approved for payment: (select a person) ▼

Organizations with access to our Expenses Module will see the option to track distance traveled in either miles or kilometers. If you'd like a local ClickTime Administrator or Manager to be notified whenever an Expense Sheet has been approved for payment, you can set that here as well.

Select the timesheet model for your company:

timesheet model: weekly ▼   what is this?
weekly
biweekly
semi-monthly   what is this?
monthly
custom

Next choose your timesheet model (the length of each timesheet period). This does not necessarily have to be the same as your pay period. ClickTime supports Weekly, Biweekly, semi-monthly, monthly and some custom timesheet models.

Select the timesheet model for your company:

timesheet model: custom ▼   what is this?
number of days per timesheet: 1 ▼   what is this?
week starts on: Sunday ▼   what is this?
next timesheet starts on: 1/4/2016 ▼   what is this?

Then indicate which day of the week your timesheet starts on. If you are changing your timesheet model, you may be asked which day to start this new model on. Selecting the "Custom" option will require you to specify the number of days you have in each timesheet period.

Note   If you change your timesheet model after creating time entries, those time entries will not be changed. However, if you used the "Lock" or "Approve" functions for any timesheets, the history of those actions will be removed and will no longer be accessible. You will probably want to go back and re-lock or re-approve those timesheets after making the change.

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List Settings for Time Entry

ClickTime time entry options can be set up in a variety of ways

▶ **Project List Settings**

▶ **Task List Settings**

▶ **Leave Type List Settings**

Collapsed List Settings

Next you will see options for Project, Task, and Leave Type List Settings. These options allow you to set up ClickTime so that users will only have certain options to select when they enter time. Click the arrow to expand each section of the page.

▼ **Project List Settings**

☐ include "non-allocated" option in project list - for web time entry

* project list width: `30` (between 10-200) - for Day View web entry

If you need additional levels (phase, sub-phase, etc.) for tracking your time, contact support.

Project List Controls   what is this?

◉ **None** - allow everyone to see all active projects. Each person manages his/her own list via "My Projects."

◯ **Moderate** - control which projects are visible to each division.

◯ **Maximum** - control which projects are visible on a person-by-person basis.

Project List Settings

In Project List Settings, we recommend un-checking the "include non-allocated option" section, unless you have a need to let users log time to projects that have not yet been created.

The Project List Controls allow you to create rules so that your employees can only access those Projects that they need to log time to. If you leave this set to **None**, each user will be able to access all active Projects, but can manage their own list using their own My Projects screen.
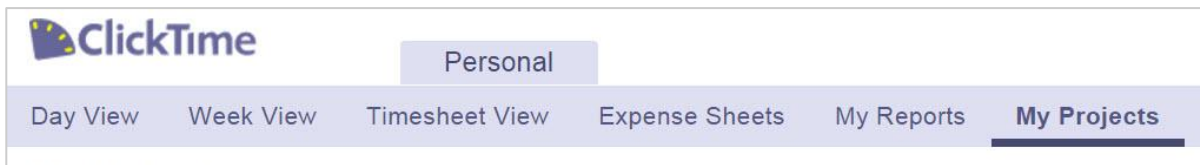
The **Moderate** option allows you set Project Availability by the Division a person works in. We'll cover Division settings in more detail in a later guide.

The **Maximum** option will let you set Project Availability on a Person-by-Person basis.

If you are using these controls, you can either set up Project Availability from the Project Detail page, the Division Detail page (when set to Moderate) or the Person Detail page (when set to Maximum).

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List Settings for Time Entry

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The Task List Settings allow you to give users access to all active Tasks (none), or set it so that the Tasks options are tied to the Client or Project used. When these are turned off, your staff can set their own Task Availability using the "My Tasks" page.

When turned on, you will see a "suitcase" icon on the Project and Task List view pages, which will take you to the "Task Availability" section of ClickTime.

Note Project and Task List Settings are available to Corporate and Enterprise accounts. All ClickTime demo accounts are set to the Corporate Feature set and available throughout your trial. If after converting to a ClickTime customer you choose the "Basic" account type, the advanced Project and Task List Settings features will no longer be available.

Next, the Leave Type List Controls allow to make all active leave types available to all users (None), or only allow certain types of employees to use them.

To edit your leave types, use the "Leave Types" link at the top of the Company Preferences page.

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Time Entry Settings.
Optimized.

To finish your setup, please see
Part 4: ClickTime Company Settings

Contact us at 415-684-1180 or email
sales@clicktime.com (demo accounts)
support@clicktime.com (current customers)

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