ClickTime® Standard User Quick-Start Guide

Just getting started with ClickTime's easy-to-use Web Timesheet? Start tracking your time and expenses like a pro with the Standard User Quick-Start Guide.

Introduction

This guide will introduce you to the ClickTime Web Timesheet. It covers an outline of basic time entry operations for standard users. The guide also includes all the optional features offered by ClickTime. If you need a more comprehensive description of these operations, please ask your ClickTime administrator.

Logging In

Go to www.clicktime.com. Click on the "Sign in" link. If you've signed in before, the URL will take you straight to the login page. Enter your full email address and your password. The password was provided to you via email.

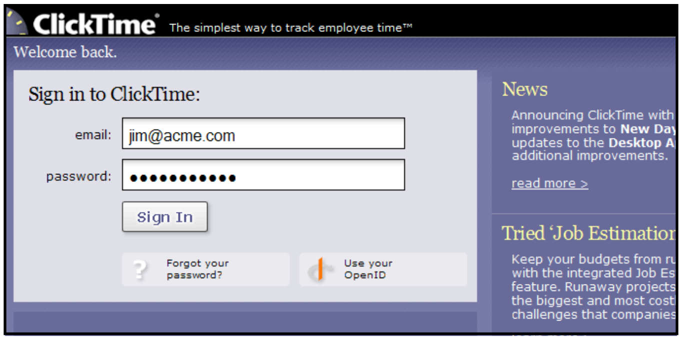

Figure 1 – Login Page

Retrieve or Change Your Password

If you don't remember your password, or cannot find the email in which you received it initially, click on the "forgot your password" link on the login page. Enter your email address. An email containing your password will be sent to you shortly.

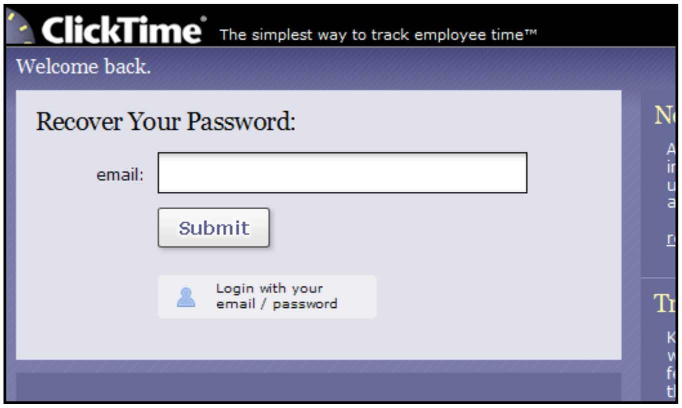

Figure 2 – Forgotten Password

To change your password, click on the "change password" link in the upper right-hand corner of the "My Preferences" page. Enter your old password once and your new password twice. Passwords have to be between 3 and 12 characters, and must contain only numbers and letters.

The ClickTime Workspace

After you log in, you will see the Week View time entry page (Figure 3). Your interface may look different, depending on your company's account settings.

A standard user interface would include the following sections: Day View, Week View, Timesheet View, Expense Sheets, My Reports, My Jobs, My Tasks and My Preferences.

Have a question about getting started?

Just contact support@clicktime.com or phone us at 415-684-1180 and ask for Support.

Your company's settings may prevent you from seeing My Expenses, My Jobs and My Tasks, as well as the "Download" tab. The terms "job" and "task" are part of ClickTime's default terminology, but your administrator has the ability to replace them with custom terms, so you may see other terminology on your interface, such as "project", "phase", "case", etc.

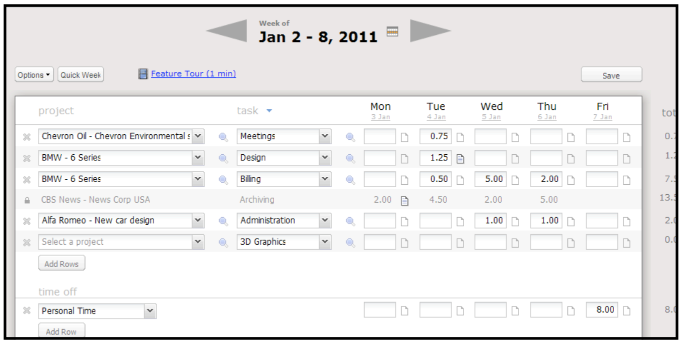

Figure 3 – Week View Time Entry Page

Personal Preferences

You can customize your ClickTime workspace on the "My Preferences" page. In the "Timesheet Information" section you can:

- select the first page you see after you log in
- choose your preferred job selection method
- specify the minimum number of time entry rows/day
- choose your default task
- select your preferred time format (AM/PM or 24h)
- show or skip weekends
- show or hide the stopwatch

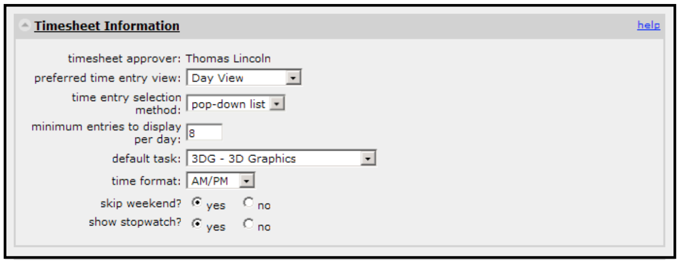

Figure 4a – "My Preferences" Page – Timesheet Information

In the "Expense Sheet Information" section (displayed only if your company uses ClickTime's Expenses feature) you can select your default expense and payment types.

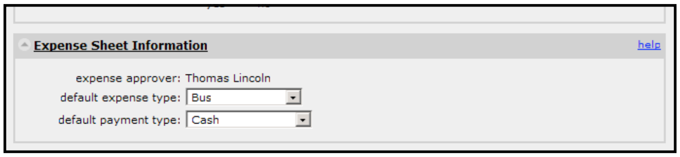

Figure 4b – "My Preferences" Page – Expense Sheet Information

Entering Time

You can enter time in ClickTime in multiple ways: through the Day View or Week View pages and through the Desktop Application, which you must download and install first.

Day View

There are three main ways of entering time on Day View:

1. standard time entries
2. time entries with start and end times
3. time entries with stopwatch

Standard Time Entries

Select a job and a task from the pop-down lists and type in a number of hours. Click on the note icon if you want to enter a comment. Click on "save" or on one of the blue arrows to save your time entry.

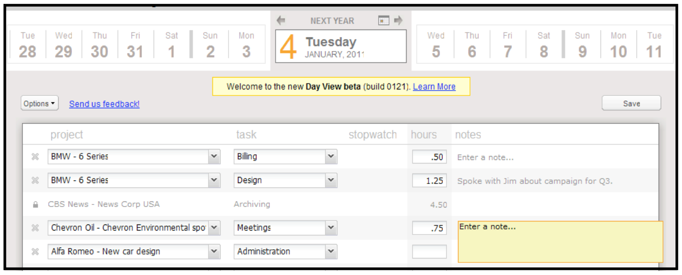

Figure 5 – "Day View" Page – Standard Time Entry

Time Entries with Start and End Time

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The ability to enter start and end times is a setting enabled by your account administrator. If you can't see it and would like to use it, contact your ClickTime administrator. Using start/end times disables the use of the Week View page.

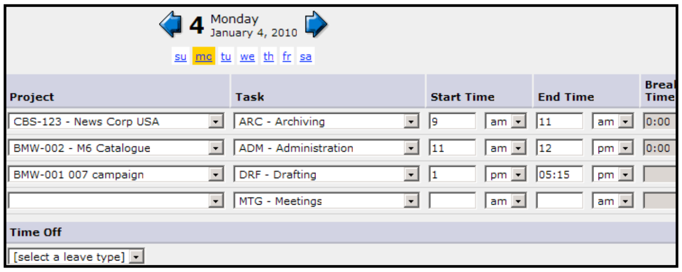

Figure 6 – "Day View" Page – Start and End Times

Select a job and a task from the pop-down lists. Type in the start time, select AM/PM. Type in the end time, and select AM/PM. The total number of hours worked will be calculated automatically and rounded to the nearest increment, based on your company's time calculation policies.

Time Entries with Stopwatch

To use the stopwatch, go to the "My Preferences" page. Then, go back to Day View, and select a job and a task from the pull down lists. Click the stopwatch icon once to start the timer. Click it again to stop the timer. Click the red "X" to clear the timer.

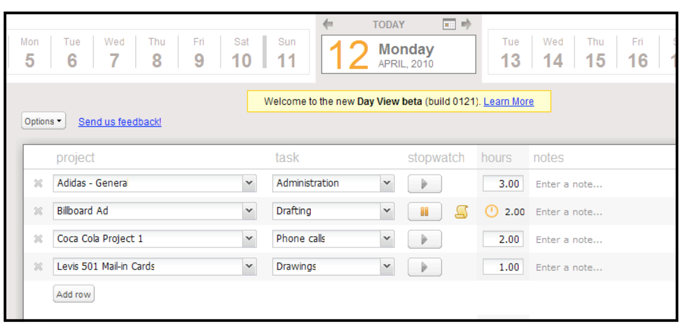

Figure 7 – "Day View" Page – Stopwatch Timer

You can use the Stopwatch Timer also when you are required to enter start and end times. Simply use the timer and the timestamps for starting and stopping the timer will be automatically entered in the start and end time fields.

Copying Time on Day View

Use the "Quickday" button to duplicate the time entries from the nearest day in the past that has time entries. Comments will not be copied over.

Week View

Note: Week View may not be available due to your company's account settings. If you use start and end times, you cannot enter time on this page.

With Week View you can easily enter and save multiple time entries for more than one day at a time. Follow the same steps as on Day View.

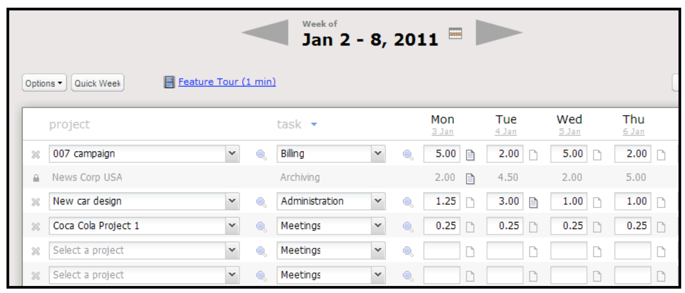

Figure 8 – "Week View" Page

Copying Time on Week View

Use the "Quickweek" button to duplicate the time entries from the nearest week in the past that has time entries. Comments will not be copied over.

Time Off

On both Day and Week View pages you may see a separate section called "Time Off". Here you can enter time off against different leave types, such as Sick Leave, Vacation, Personal Time, etc. Your company may use these time entries in conjunction with ClickTime's Automated Accruals Module.

Timesheets

Your online timesheets look very much like the typical paper versions. The timesheet model can be weekly, biweekly,

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monthly, custom, etc, depending on your company's settings. Go to "Timesheet View" to see your timesheets.

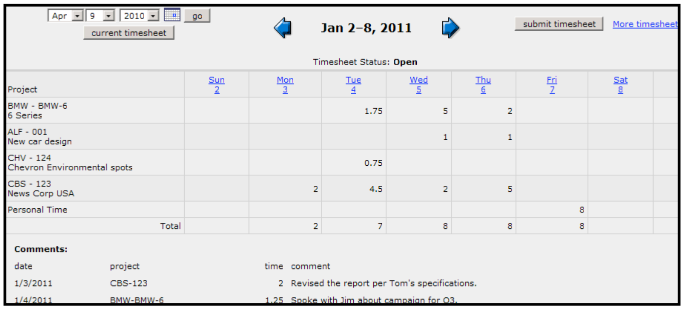

Figure 9 – "Timesheet View" Page

To see or edit the details of a time entry, click on the day that you wish to view. It will take you directly to the Day View time entry page for that day.

Submit Your Timesheet

If the Timesheet Approval Module is enabled, you will see a "submit" button in the upper right-hand corner of your Timesheet View page. By clicking it, you can submit your timesheet to the designated person.

Figure 10 – Submitting a Timesheet for Approval

Expenses

You will see this page only if the Expense Tracking Module is enabled for your company's account. With this module, you can keep track of your business-related expenses. Expenses are grouped into Expense Sheets. To see a list with all your expense sheets, go to the "My Expense Sheets" page. To create a new expense sheet, click the "new expense sheet" link in the top-right corner (see Figure 11).

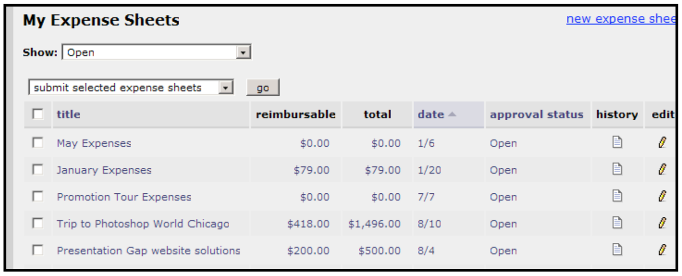

Figure 11 – "My Expense Sheets" Page

Click on an expense sheet to see all expenses associated with it. It will take you to the "Expense Sheet Detail" page (see Figure 12). On this page you can add expenses to this sheet, delete the expense sheet or submit it for approval.

Figure 12 – "Expense Sheet Detail" Page

To add an expense to an expense sheet, click the "add expense" button (see Figure 13). It will take you to the "Add Expense" page. On this screen you can specify all the information related to the expense: date, type (Airfare, Car Rental, etc), amount, payment method, description, etc. You can also associate the expense with a job. Use the "save" button to save your expense details. You can also enter expenses with foreign currencies, using ClickTime's currency converter. The foreign currency will be automatically converted into your company's home currency.

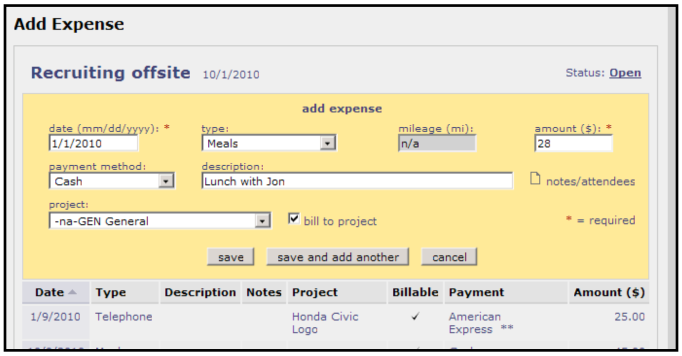

Figure 13 – "Add Expense" Page

My Reports

Several reports are available to standard users on the "My Reports" page: Horizontal Timesheet, Vertical Timesheet, Incomplete Time Entry, Job and Task Summary, Task Summary, Expense Sheet, Time Off and Accrual Summary and Time Off and Accrual Detail. Each report will display a preview image and a brief description when you select it from the list.

My Jobs and My Tasks

The "My Jobs" page will be available depending on your company's account settings. On this page, you have the option to show or hide the jobs that appear on your time entry pop-down lists. This feature allows you to sort and see only the jobs that you work on. You can show/hide all jobs associated with a client, or select individual jobs. Your changes will be reflected only on your own time entry screens.

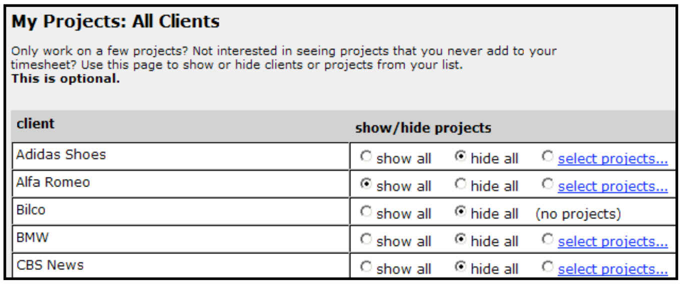

Figure 14 – "My Jobs" page

The "My Tasks" page will be available depending on your company's account settings. On this page, you have the option to show or hide the tasks that appear on your time entry pop-down lists. This feature allows you to sort and see only the tasks that you work on. Your changes will be reflected only on your own time entry screens.

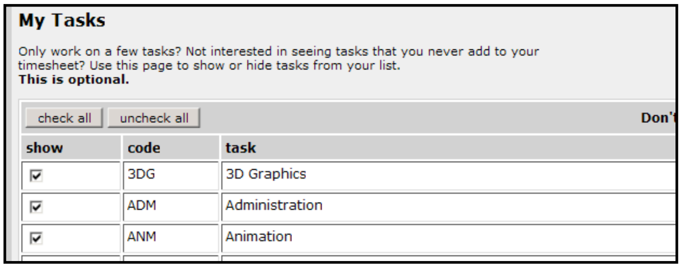

Figure 15 – "My Tasks" Page

For further questions, contact your ClickTime administrator or send an email to support@clicktime.com.

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