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 the 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**

Start by going to <u>www.clicktime.com</u>. If you've signed in before, the URL will take you straight to the Login Page. If this is the first time you are logging into ClickTime, click on the "Sign In" link at the top right corner to be brought to the login page. Enter your full email address and your password. Your password was included in your Welcome Email.



#### **Retrieve or Change Your Password**

If you don't remember your password, or cannot find the Welcome Email that was initially sent to you, click on the "Forgot your password?" link on the login page. Enter your email address and click "Send password reset link". An email containing your password will be sent to you shortly.



To change your password after you've logged in, click on the "Change Password" link in the upper right-hand corner of the Help Box, or from your "My Preferences" page. Enter your old password once and your new password twice, and then click "Update". Passwords have to be between 3 and 12 characters and can only contain numbers and letters.

#### The ClickTime Workspace

After you log in, you will see the Week View time entry page (see Page 2). 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
- My Preferences

Your company's settings may prevent you from seeing My Expenses, My Jobs and My Tasks, as well as the "Mobility" 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", "work code", "case", etc.

voice +1 (415) 684-1180

fax +1 (415) 684-1099

Page 1 of 5

282 Second Street, 4th Floor San Francisco, CA 94105 info@clicktime.com www.clicktime.com

©2014 Clicktime.com, Inc. ClickTime is a registered trademark of Clicktime.com, Inc. All other product and company names are trademarks of their respective holders.

Options • Qui	k Week	E Peature Tour La P	1000							Save
client .		project		task		Mon May 5	Tue Nav 6	Wed Hex 2	Thu Nov.8	Fri May 9
Adidas Shoes	•	Gazele		Administration	۹,	1.00	0.50	2.00	1.00	1.50
Acre Internal	•	Company Branding	•	3D Graphics	•		0.25	0.50	2.00	
CBS News	•	CBS Commercial Ad		Creative Design	•	0.50	0.50	1.00	0.50	1.00
CBS News		News Corp USA		Drawings	•	1.00	2.00	1.00	1.00	2.00
Panasonic		Shockwave Ad		Animation	•	0.75	0.75	0.75	0.75	2.00
Wells Fargo	•	Wells Fargo Home Loan	Br 🔍	Creative Design	•	2.00	2.50	1.00	0.50	1.00
	Θ,				Θ,					
Wells Fargo Select a client Add Rows time off	•	Wells Fargo Home Loan I	Br	Creative Design Select a project first	•	2.00	2.50	1.00	0.50	1.00

#### **Personal Preferences**

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

- View which page you see after you log in (known as the home page). Click the "Set As Home Page" link at the bottom of any page to change your Home Page.
- 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

# ▼ Timesheet Information timesheet approver: Jim Hobbs my home page: Dashboard preferred time entry view: Week View time entry selection method: pop-down list minimum entries to display per day: default task: MTG - Meetings time format: AM/PM skip weekend? @ yes ○ no

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.

▼ Expense Sheet Information	
expense a	pprover: Jim Hobbs
default expen	se type: select one 🔻
default payme	ent type: select one 🔻

If you are required to have timesheets approved by another ClickTime user, you can edit your default Notifications settings.

V Notifications	
In addition 1	to receiving an email notification when your time or expense sheet has been rejected
Timesheet	Notifications
✓ Rej	ected You will always receive notifications when a timesheet is rejected, proved
Expense S	heet Notifications
₹ Rej Ap	You will always receive notifications when a timesheet is rejected. proved d

This can also be done on a case-by-case basis when you submit your Timesheets or Expense Sheets to be approved.

#### **Entering Time**

You can enter your time into ClickTime in a variety of ways:

- Day View
- Week View
- Through the Desktop Application (which must first be downloaded and installed)
- Use the ClickTime Mobile Web for iPhone<sup>™</sup> and Android<sup>™</sup> app (available on the App Store and Google Play)

## **Standard Time Entries**

Select a job and a task from the drop-down menu and type in the number of hours you spent on the task. Click on the note section if you want to enter a comment. Then click either of the "Save" buttons, or use the "Auto-Save" feature to have ClickTime save the time automatically for you. If you use one of the grey arrows to move to another day, the time will be saved automatically as well.

282 Second Street, 4th Floor San Francisco, CA 94105 info@clicktime.com www.clicktime.com voice +1 (415) 684-1180 fax +1 (415) 684-1099

	Mon Tue 12 13	14	d Thu Fri Mon Tue 4 15 16 19 20	[	<ul> <li>TODAY</li> <li>Wednesd MAY, 2014</li> </ul>	lay	* Thu 22	ен 23	Mon         Tue         Wed         Thu         Fri           26         27         28         29         30
•	Options • Quick D	ŧγ	Feedback Back To Standard Day Vi	<u>e.v</u>	task	st	owatch	hours	Save
×	Under Armour	~	Banner Ad	~	Drafting ~		Þ	2.50	Enter a note
×	Panasonic	v	Shodowave Ad	~	Drafting		Þ	2.00	Magazine Ad
×	BMW	v	6 Series	v	Design		Þ.	2.00	Drafting
×	BMW	¥	6 Series	¥	Meetings 👻		Þ.	1.00	with Design Head
×	Apple	۷	iTunes 10 Web Ad	۷	Design		þ.	0.50	1
×	Select a client	۷	Select a project	v	Meetings		Þ.		
	Add Row								

#### **Time Entries with Start and End Time**

You can enable the option to enter time in Day View with Start and End times from your Options menu. Organizations can require that all or some employees use Start and End times when entering time. If your administrator has required you to use Start/End times, you will not be able to enter time in Week View.

	Tue 13		Wed Thu Fri Mon 14 15 16 19	Tue 20	× * *	TOMORR	0W Ursd Y, 20		ел 23	Mon 26	Tue   V 27   2	Ved   Thu 28   29
ò	Options • Quick	Day	Feedback Back To Standard	Day View	task		۲	start	end	break	hours	note
х	Under Armour	۷	Banner Ad	*	Drafting	~	÷.	9:00 AM	10:30 AM	00:00	1.50	Enter a note
х	Panasonic	¥	Shodwave Ad	*	Drafting	*	Þ.	10:30 AM	11:45 AM	00:15	1.00	Enter a note
х	BMW	v	6 Series	×	Design	×	Þ.	11:45 AM	1:00 PM	00:00	1.25	Enter a note
$^{\rm H}$	BMW	۷	6 Series	Y	Meetings	¥	÷.	1:00 PM	3:00 PM	00:00	2.00	Enter a note
х	Apple	v	iTunes 10 Web Ad	~	Design	¥	÷.	3:00 PM	4:45 PM	00:30	1.25	Enter a note
$^{\times}$	Select a client	v	Select a project	~	Meetings	*	÷.	00:00 AM	00:00 PM	00:00		Enter a note

Select a job and a task from the drop-down menus. Then type in the time you started working on the task (including AM or PM) and the end time (also including AM or PM) when you finished. The total number of hours worked will be calculated automatically. ClickTime will round your time to the nearest increment (which is based on your company's time calculation policies).

#### **Time Entries with Stopwatch**

You can choose to "Show Stopwatch" from your Day View Options screen. Then select a job and a task from the dropdown menu. Clicking the "Play" stopwatch icon once will start the timer. Click the red "stop" icon or yellow "pause" icon to stop or pause the timer.

	Tue 13		Ved Thu Fri Mon L4 15 16 19	10e 20	wed 21 22		10W 11SC	≡ ⇒ lay 14	м 23	Mon 26	Tue V 27 2	Ved 28
¢	Options • Quick	Day	Feedback Back To Standar	d Day View	task		e	start	end	break	hours	note
1	Under Armour	~	Banner Ad	~	Drafting	~	÷.	9:00 AM	10:30 AM	00:00	1.50	Ente
к	Panasonic	~	Shodwave Ad	~	Drafting	~	÷.	10:30 AM	11:45 AM	00:15	1.00	Ente
к	BMW	~	6 Series	~	Design	~	÷.	11:45 AM	1:00 PM	00:00	1.25	Ente
х	BMW	~	6 Series	~	Meetings	~	÷.	1:00 PM	3:00 PM	00:00	2.00	Ente
к	Apple	~	iTunes 10 Web Ad	~	Design	~	÷.	3:00 PM	4:45 PM	00:30	1.25	Ente
	Panasopic	×	Chochuraua Ad	×	Drafting	×		E-04.0M			0 0 75	Ente

You can still use the Stopwatch Timer when required to enter start and end times. Simply use the Stopwatch to track when you work on the task, and the start and end times will be filled in for you.

#### **Copying Time in Day View**

Use the "Quick Day" button to duplicate time entries from the most recent day in the past with entered time. The comments will be copied over. You can clear them by clicking "Clear Copied Notes".

#### **Week View**

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 Day View.

			M	ek of lay	11 - 17, 20	14 =		-				
0	Options - Quick V	leek	E Feature Tour (1 min	1							Save	
	client 🔺		project		task		Mon Max 12	Tue Max.13	Wed Nav.14	Thu May 15	Fri Max.16	tota
25	Acme Internal		Company Branding	۹,	3D Graphics	Θ,	2.00	1.00	2.00	1.00	2.00	8.00
х	Adidas Shoes	•	Gazelle	۹,	Administration	•	0.50	1.00	0.50	1.00	0.50	3.50
20	CBS News	۹,	CBS Commercial Ad	۹,	Administration	•	1.00	2.00	0.50	1.00	1.00	5.50
н	CBS News		CBS Commercial Ad	9,	Creative Design		1.00	2.00	1.00	2.00	1.00	7.00
25	CBS News		News Corp USA	۹,	Drawings	Θ,	1.50	0.50	1.50	1.00	1.50	6.00
ж	Panasonic	•	Shockwave Ad	۹,	Animation	•	1.00	1.00	1.00	1.00	1.00	5.00
26	Wells Fargo	۹,	Wells Fargo Home Loan B	۹.	Creative Design	•	1.00	0.50	1.50	1.00	1.00	5.00

Please note that 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.

282 Second Street, 4th Floor San Francisco, CA 94105 info@clicktime.com www.clicktime.com

# **ClickTime**<sup>®</sup>

#### Copying Time in Week View

Use the "Quick Week" button to duplicate time entries from the nearest week in the past with time entries.

Comments will not be copied over when using "Quick Week".

#### **Time Off**

You may see a separate section called "time off" on both the Day and Week View pages. Here is where you can enter time off using the different leave types set up by your company (Sick Leave, Vacation, Personal Time, etc). Companies can use the Automated Accruals Module to automatically calculate the amount of leave you have available.

#### **Timesheet View**

Jim Hobbs dusion Administration employment type Officier	4.00 hours/day required administration Memory associated to the second	# #2370KY 目前     May 11, 2014 - May 17, 2014     @+0-0 OPEN								Port Options • Ins Trousheet
Colores All				11 1	2 13	10red 14	1hu 16	16 18	5ar 17	total
CBS Commercial Ad				- 2	00 4.00	1.50	3.00	2.00		12.50
Company Branding				2	00 1.00	2.00	1.00	2.00		8.00
Gazelie				0	50 1.00	0.50	1.00	0.50		3.50
News Corp USA				1	50 0.50	1.50	1.00	1.50		6.00
Shockwave Ad				1	00 1.00	1.00	1.00	1.00		5.00
Tiels Fargo Home Loan Brochure				•	00 0.50	1.50	1.00	1.00		5.00
				0.00 8	00 8.00	8.00	8.00	8.00	0.00	40.00
NOTER										33×
Search A CBS Commercial Ad	5122044		5.00 hr							6

Go to "Timesheet View" to see your timesheets. Your online timesheets look very much like the typical paper versions, but with more options. The timesheet model can be weekly, biweekly, monthly, or customized to match your company's settings.

To see or edit the details of a time entry, click on the day that you wish to view. This 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 at the top of your Timesheet View page. Clicking that button will let you submit your timesheet to the designated person.

Submit Timesheet for Approval - Google Chrome	
https://app.clicktime.com/Timesheet/SubmitTimesheet.asp?Times	heetList=1051.
Submit Timesheet for Approval	
A request for approval of the May 18-24, 2014 timesheet will be made to	Jim Hobbs.
Comments (included with approval request):	
CC: (enter email addresses separated by commas)	ß
Receive notifications when timesheets are:	
Rejected (locked)	
Approved	
Cancel Submit for Approval	

#### Expenses

You will only see this page if your company is using the Expense Tracking Module, which allows you to keep track of businessrelated expenses. Expenses are grouped into Expense Sheets. To see all of your Expense Sheets, go to the "My Expense Sheets" page. To create a new expense sheet, click the "Add Expense Sheet" link in the top-right corner.

April Business Trip	ps							
Carlo 412014 Status Webby	for Approval <u>Instanc</u>					Autting Veningerge Itert Debis	Inst Evenie seet Print	ACEPTE
Date -	Type	Description	Notes	Job	Difusiv	Payment	Amount (B)	Receipt
400114	Arten					American Express	251.00	
4152014	Meats					American Express	100.00	
4292014	Tani					Cash	20.00	
4252014	Habi	Two regMs in TX		General Admin	×	American Express	250.00	
T - non miniburgation						Reinducturity Total	44144.44	

Click on the name of an Expense Sheet to see all of the associated expenses. On this page you can add expenses to the Expense Sheet, print the Expense Sheet or all Receipts, delete the Expense Sheet, or Submit the Expense Sheet for approval.

Page4 of5

282 Second Street, 4th Floor San Francisco, CA 94105 info@clicktime.com www.clicktime.com voice +1 (415) 684-1180 fax +1 (415) 684-1099

©2014 Clicktime.com, Inc. ClickTime is a registered trademark of Clicktime.com, Inc. All other product and company names are trademarks of their respective holders.

EXPENSE SHEETS > APRIL BUSINES April Business Trip	expense sheets > april business trips > April Business Trips								
Date: 4/1/2014 Status: Rejected Add Expense DATE (MM/DD/YYY)* TY/ 4/30/14 C PAYMENT METHOD DE	d ( <u>history)</u> PE ar Rental • SCRIPTION	MILEAGE (MI)	AMOUNT (\$) * 250 NOTES / ATTENDEES						
American Express  In JOB GEN-GEN-A General Admin RECEIPT Attach Receipt Delete Receipt	American Express       In TX       In TX       Add Notes         JOB       GEN-GEN-A General Admin       Image: Section of the se								
Save and Add Next	Save Cancel	Description							
4/2/2014	Airfare								

**ClickTime** 

To add an expense to an Expense Sheet, click the "Add Expense Item" button. On the next screen you can specify all the information related to the expense: date, type (Airfare, Car Rental, etc.), amount, payment method, description, and more. You can also associate the expense with a job. Use the "Save" button to save your expense details. If you enabled foreign currencies when you created the Expense Sheet, you can also enter expenses with foreign currencies. The foreign currency will be automatically converted into your company's home currency using ClickTime's currency converter.

#### **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 in your time entry drop-down menus. This feature allows you to only choose the jobs that you work on. You can show/hide all jobs associated with a

client, or select individual jobs. Your changes will only be reflected on your own time entry screens.

My Jobs	
Select the clients and jobs you want to show when entering time. This is op	ptional.
client	Show All Hide All
Acme Internal	Show All      Hide All      Select Jobs
Adidas Shoes	○ Show All ○ Hide All ④ Select Jobs
Alfa Romeo	Show All O Hide All O Select Jobs
Apple	Show All  Hide All  Select Jobs
AUDI	Show All O Hide All O Select Jobs

The "My Tasks" page will also only 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 drop-down menus. This feature allows you to see only those tasks that you perform. Your changes will be reflected only on your own time entry screens.

My Tasks		
Select the tasks you want to show when entering time. This is optional.		
	Task Code	Task Name
	0001	3D Graphics
	ADM	Administration
	ANM	Animation
	ARC	Archiving
	BLL	Billing
	CD	Creative Design

Have a question that's not asked here? Just contact <u>support@clicktime.com</u> or phone us at +1 415 684 1180.

Page 5 of 5

282 Second Street, 4th Floor San Francisco, CA 94105 info@clicktime.com www.clicktime.com voice +1 (415) 684-1180 fax +1 (415) 684-1099

©2014 Clicktime.com, Inc. ClickTime is a registered trademark of Clicktime.com, Inc. All other product and company names are trademarks of their respective holders.