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

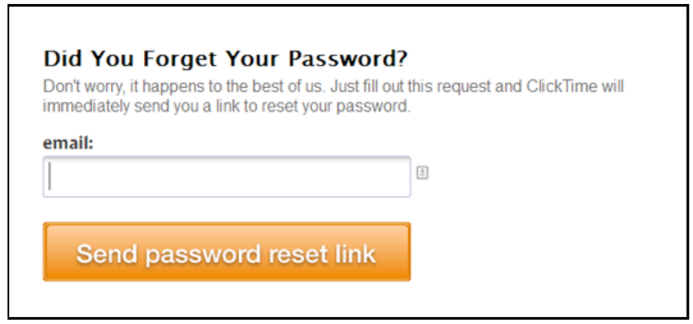
This guide will introduce you to the ClickTime Web Timesheet. It covers an outline of the basic time entry operations for standard users. The guide also includes all the optional features offered by ClickTime. If you need a more comprehensive description of these operations, please ask your ClickTime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

Logging In

Start by going to www.clicktime.com. 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.

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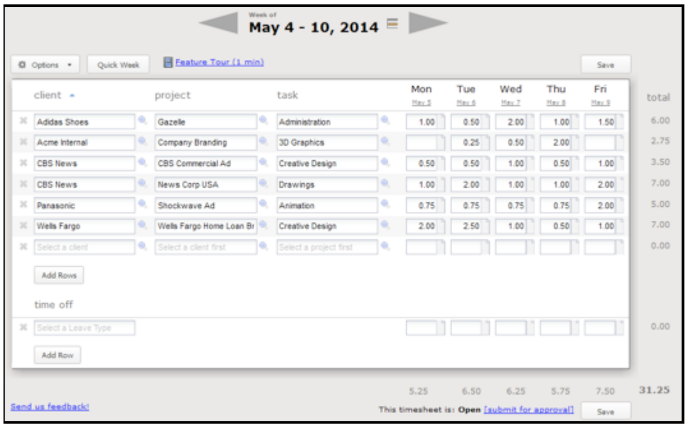
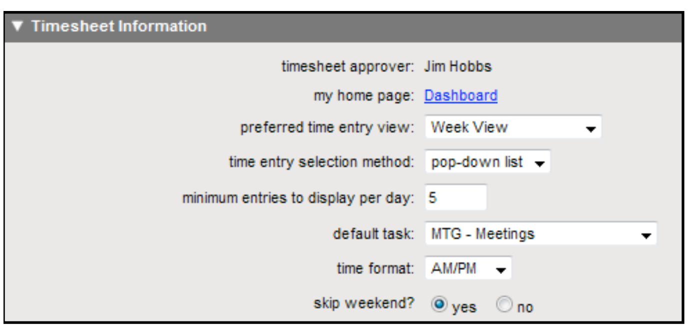


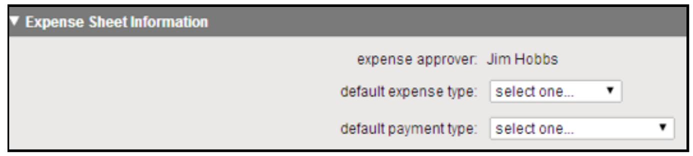
Personal Preferences

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

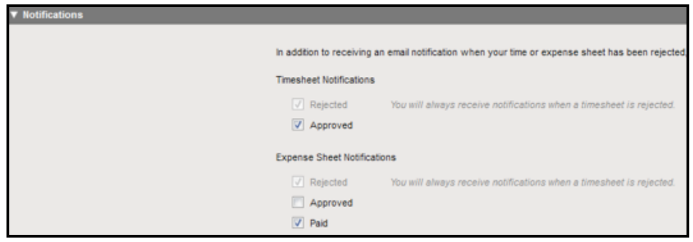
- View which page you see after you log in (known as the home page). Click the "Set As Home Page" link at the bottom of any page to change your Home Page.
- Choose your preferred job selection method
- Specify the minimum number of time entry rows/day
- Choose your default task
- Select your preferred time format (AM/PM or 24h)
- Show or skip weekends



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.



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



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™ and Android™ 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.

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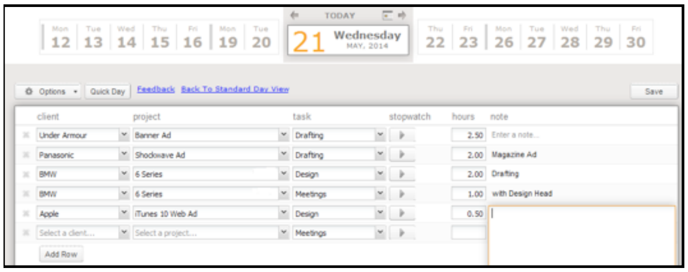
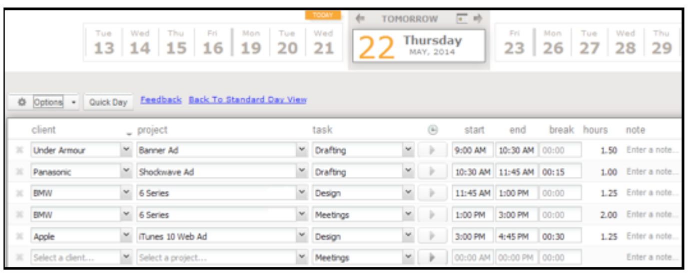


Time Entries with Start and End Time

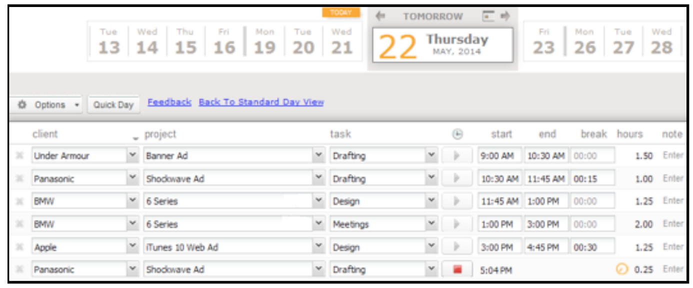
You can enable the option to enter time in Day View with Start and End times from your Options menu. Organizations can require that all or some employees use Start and End times when entering time. If your administrator has required you to use Start/End times, you will not be able to enter time in Week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



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 drop-down 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.



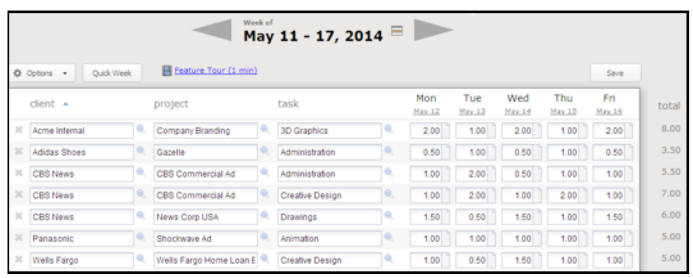
You can still use the Stopwatch Timer when required to enter start and end times. Simply use the Stopwatch to track when you work on the task, and the start and end times will be filled in for you.

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.



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.

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Copying Time in Week View

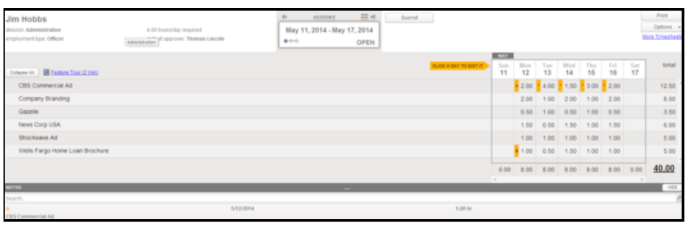
Use the "Quick Week" button to duplicate time entries from the nearest week in the past with time entries.

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

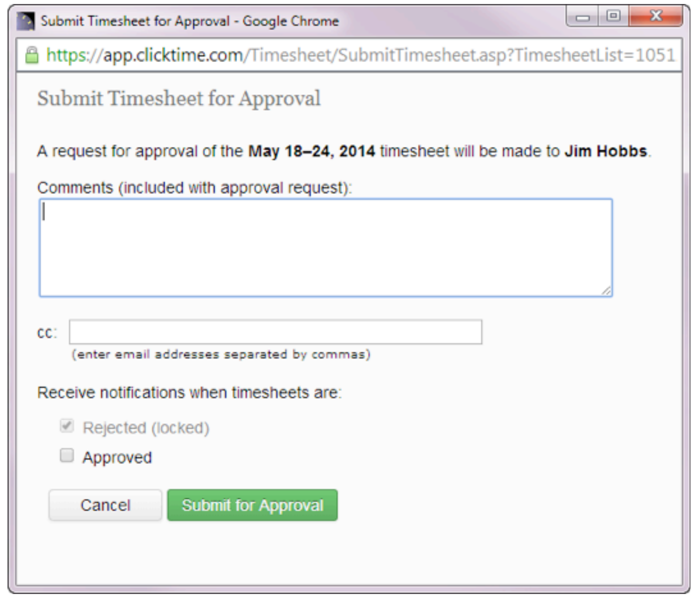


Go to "Timesheet View" to see your timesheets. Your online timesheets look very much like the typical paper versions, but with more options. The timesheet model can be weekly, biweekly, monthly, or customized to match your company's settings.

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.

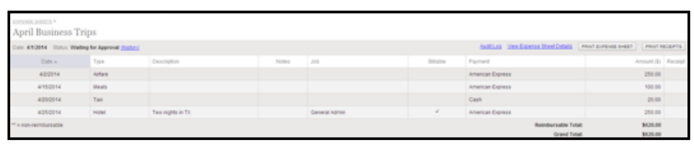
Submit Your Timesheet

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.



Expenses

You will only see this page if your company is using the Expense Tracking Module, which allows you to keep track of business-related 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.



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.

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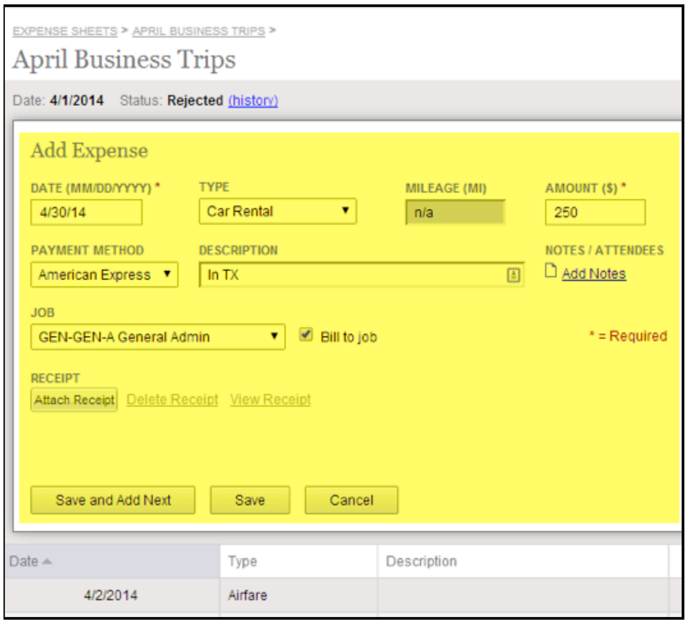


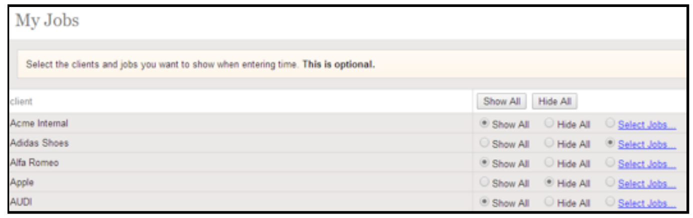
To add an expense to an Expense Sheet, click the "Add Expense Item" button. On the next screen you can specify all the information related to the expense: date, type (Airfare, Car Rental, etc.), amount, payment method, description, and more. You can also associate the expense with a job. Use the "Save" 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

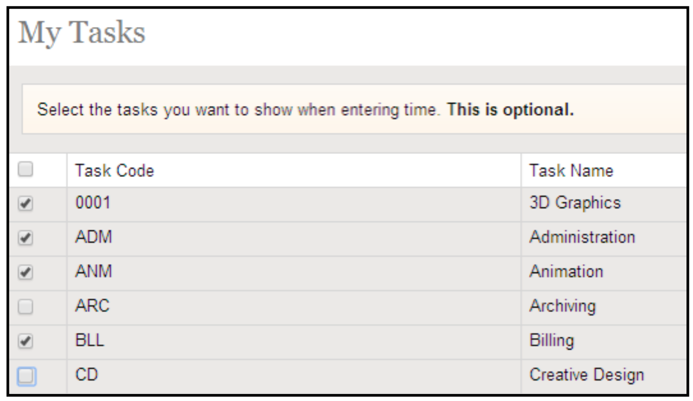
Several reports are available to standard users on the "My Reports" page: Horizontal Timesheet, Vertical Timesheet, Incomplete Time Entry, Job and Task Summary, Task Summary, Expense Sheet, Time Off and Accrual Summary and Time Off and Accrual Detail. Each report will display a preview image and a brief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



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.



Have a question that's not asked here?
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