PART 3:

ClickTime Time Entry Settings

Set up your Company-wide Time Entry settings

282 Second Street. Fourth Floor, San Francisco, CA 94105
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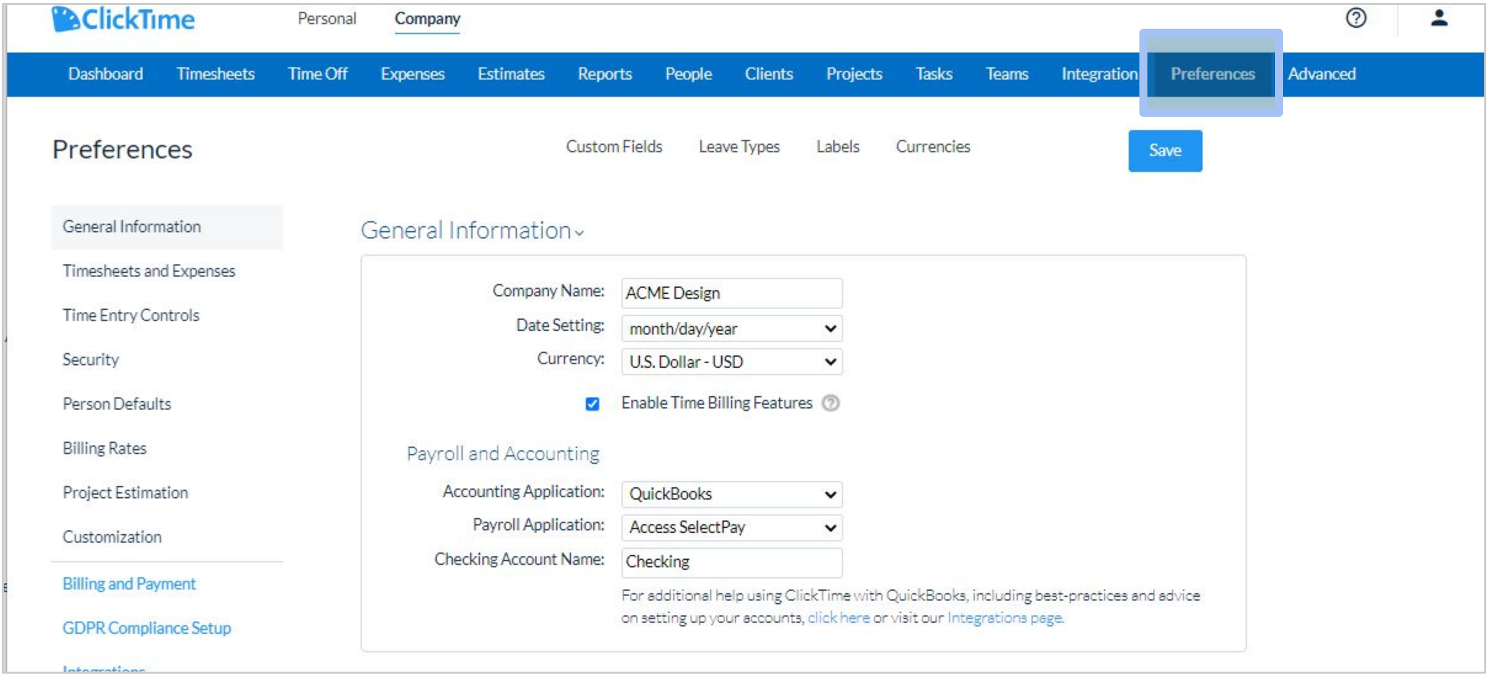
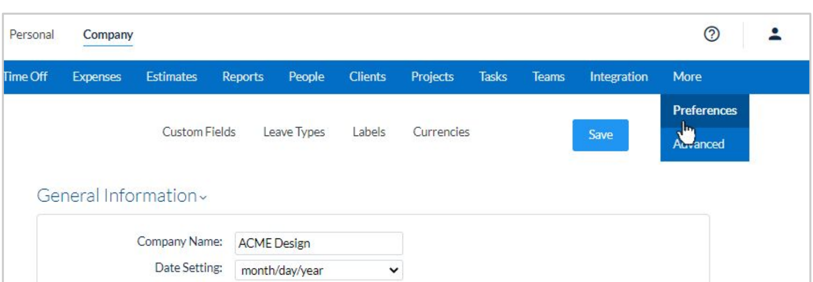
General Company Information

The first two sections of the Company Preferences page will allow you to 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 is 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".

ClickTime Basics

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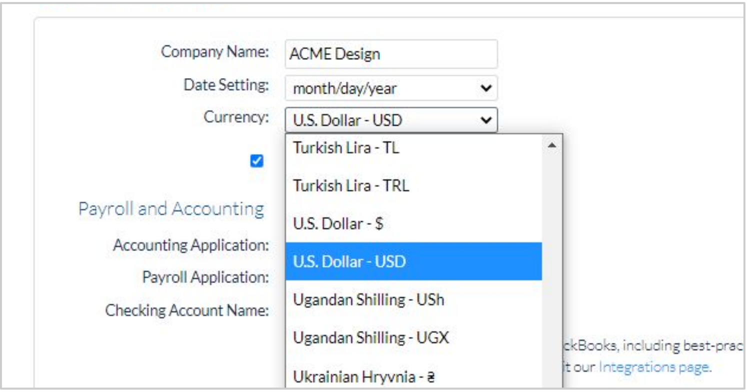
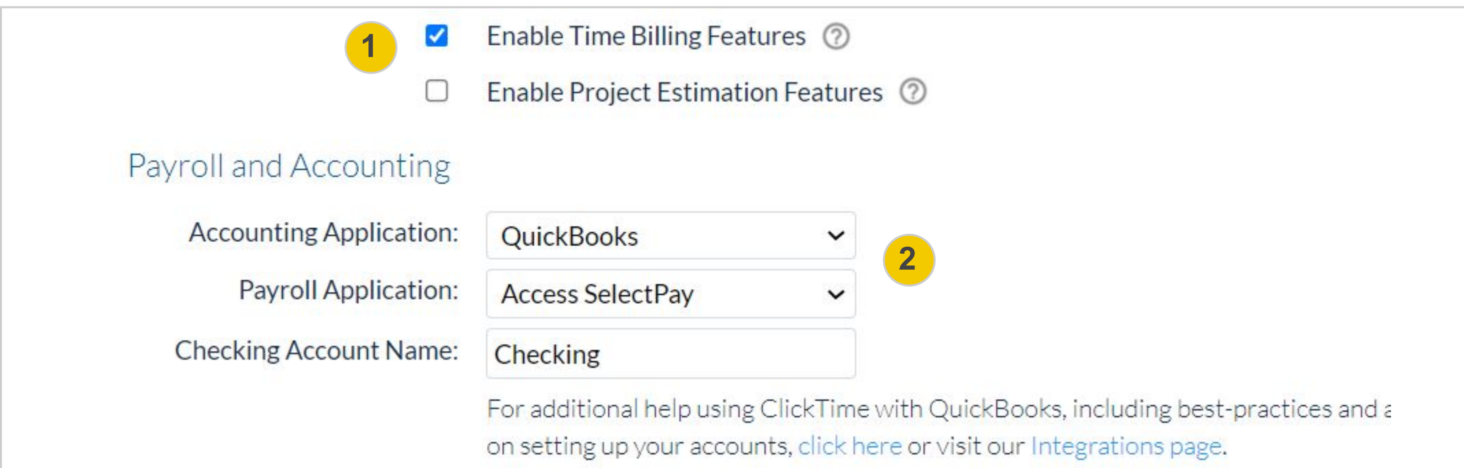
General Company Information



Company Name is the name in our database. This will default to whatever you initially signed up with.

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 team know so we can add it!

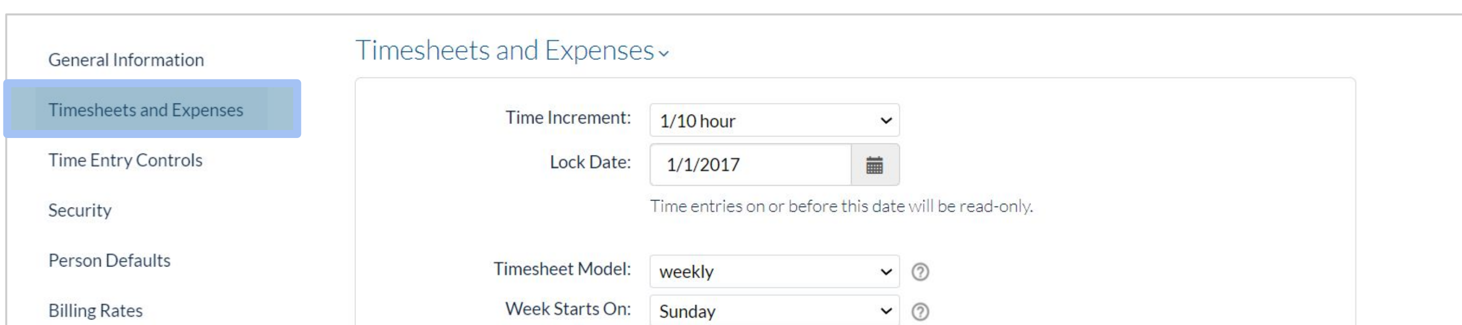
Below you can check whether Billing features are enabled, as well as provide optional information about the Accounting and Payroll applications your organization uses.



1 ClickTime supports time billing options, which can be enabled here. We also support two different budgeting options for Premier+ plans. If you have any questions about using either option, please reach out to the ClickTime Sales Team.

2 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. You can also let us know the name of your Checking Account.

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

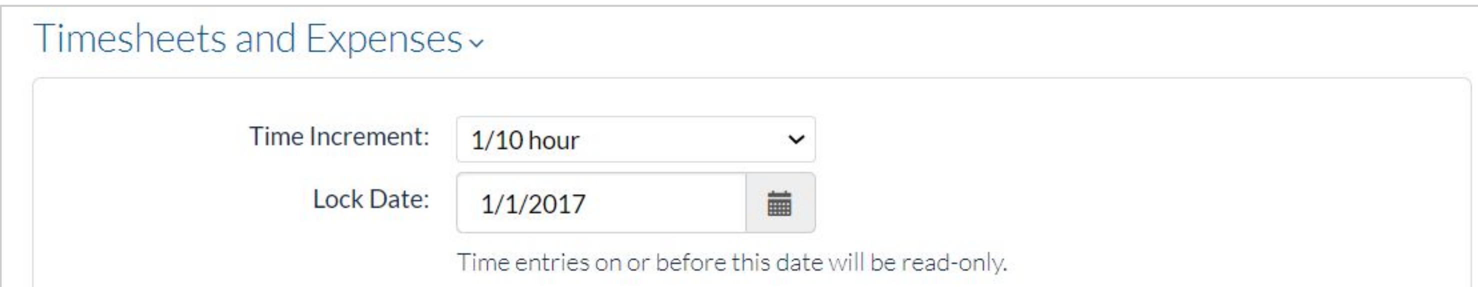


Timesheet and Expense Information

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

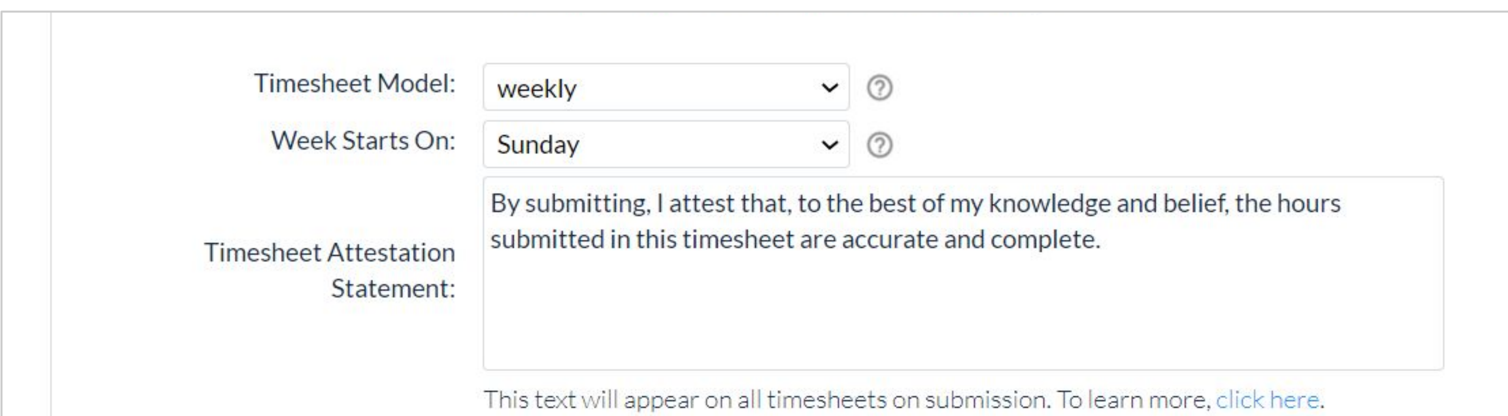
- 1/10 hour (every 6 minutes)
- 1/4 hour (every 15 minutes)
- 1/2 hour (every 30 minutes)
- hourly (every 60 minutes)

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.

Next you can confirm/set up your time timesheet (the length of each timesheet period). This does not necessarily have to be the same as your pay period.



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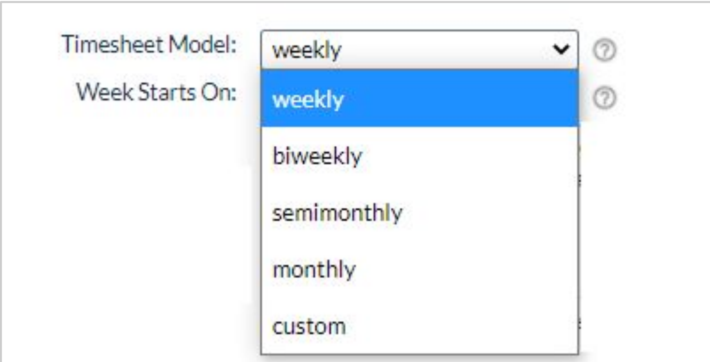
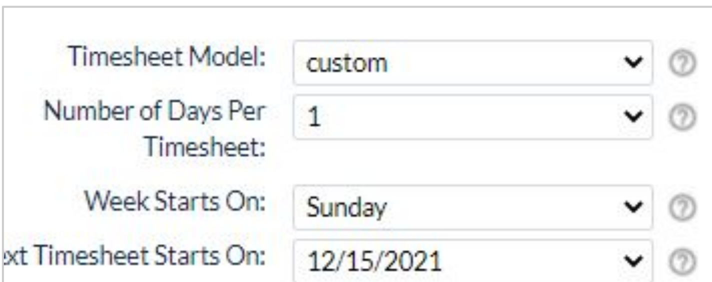
Timesheet and Expense Information



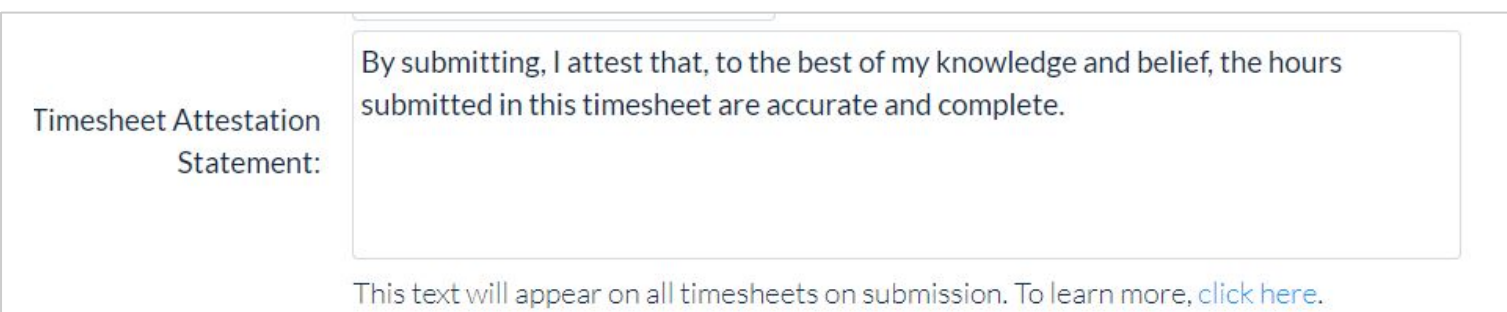
Select your timesheet model from the drop-down menu. ClickTime supports Weekly, Biweekly, semi-monthly, monthly and some custom timesheet models.



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.

Below this is the “Timesheet Attestation” Statement that will appear on all timesheets when they are submitted. We’ve provided some default language, but you can customize this if you’d like. More information on Timesheet Attestation [can be found here](#).



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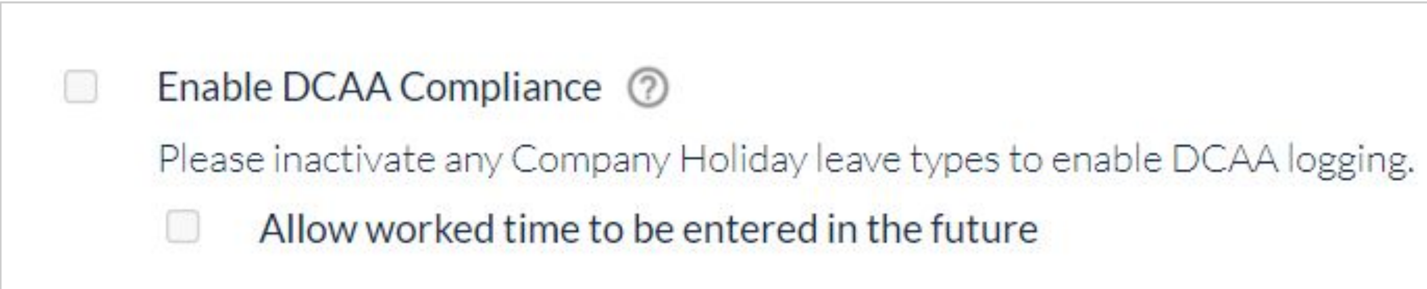
Timesheet and Expense Information



Below the Timesheet Attestation text is the option to enable DCAA Compliance features (more details here). If you are a demo account with a government contract and need to be compliant with the Defense Contract Audit Agency (DCAA), we recommend discussing this setting and the related costs with your Account Executive. You will likely need to inactivate your Company Holiday Leave Type before you can turn this setting on.

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.

Below this is a setting for our optional Expenses Module. You can indicate if your organization would like to track track distance traveled in either miles or kilometers.

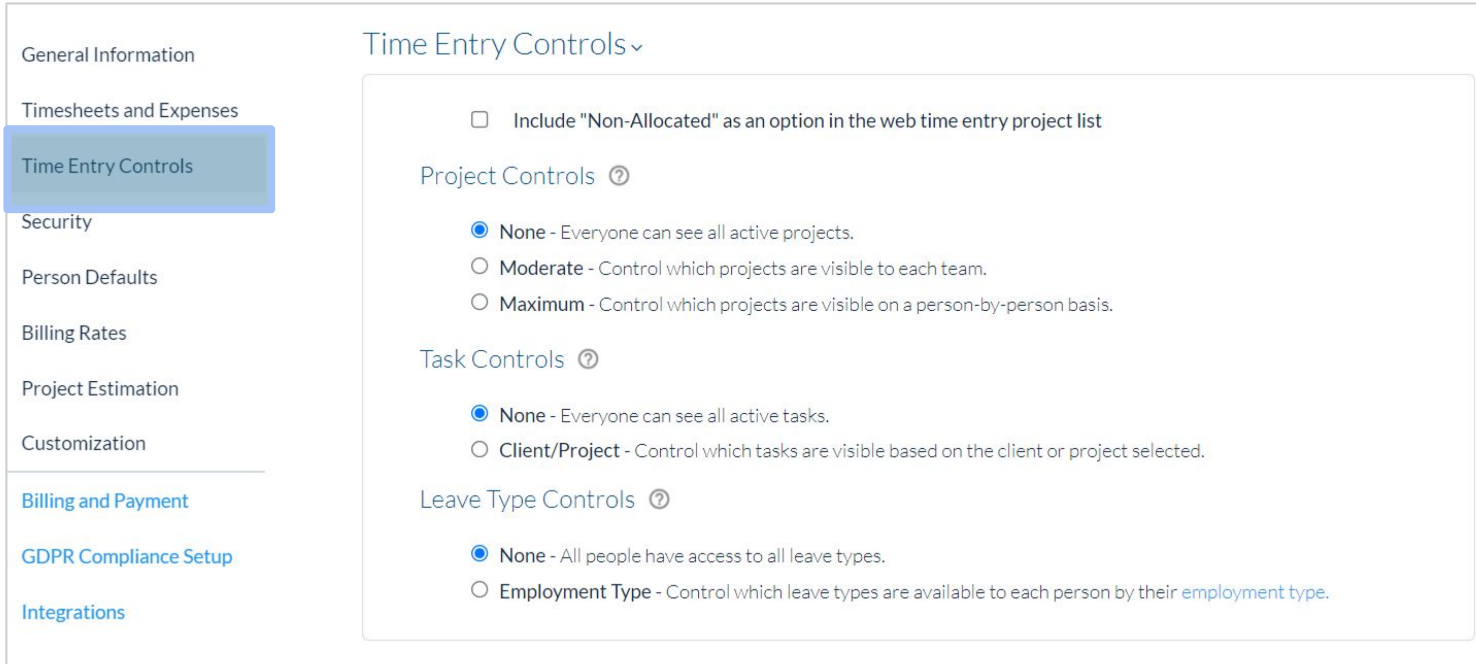
If there is a specific ClickTime Administrator that should be notified whenever an Expense Sheet has been approved for payment, you can set that here as well.

Next we'll cover the Time Entry Controls that allow you to manage which time entry options are available to employees and Projects.

List Settings for Time Entry

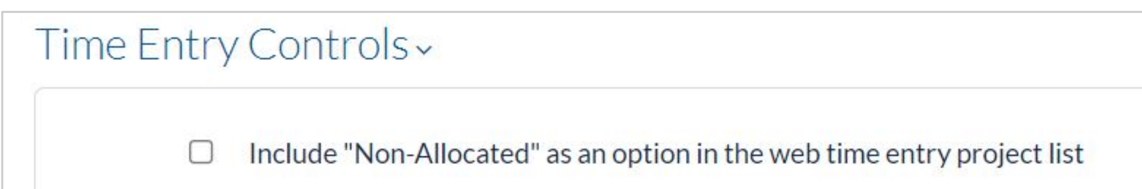
ClickTime time entry options can be set up in a variety of ways

Below “Timesheet and Expenses” is the “Time Entry Controls” section of the page. These options allow you to set up ClickTime so that users will only have certain options to select when they enter time.



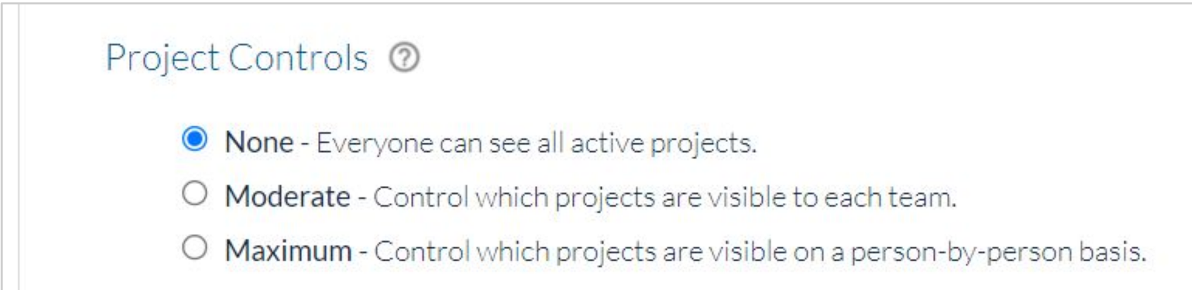
Project Controls

In Project Controls, we recommend leaving the "include non-allocated option" box un-checked.



Next, there are additional settings that allow you to create rules so that your employees can only access those Projects that they need to log time to.

List Settings for Time Entry



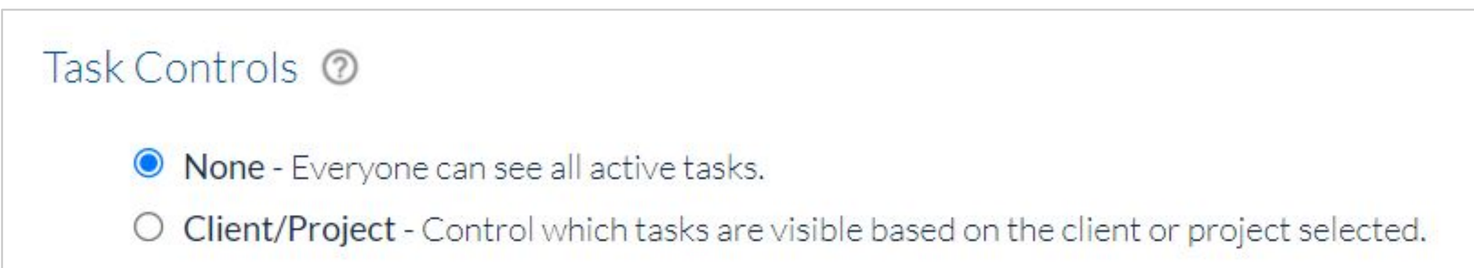
The **Moderate** option allows you to set Project Availability by the Division a person works in.

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

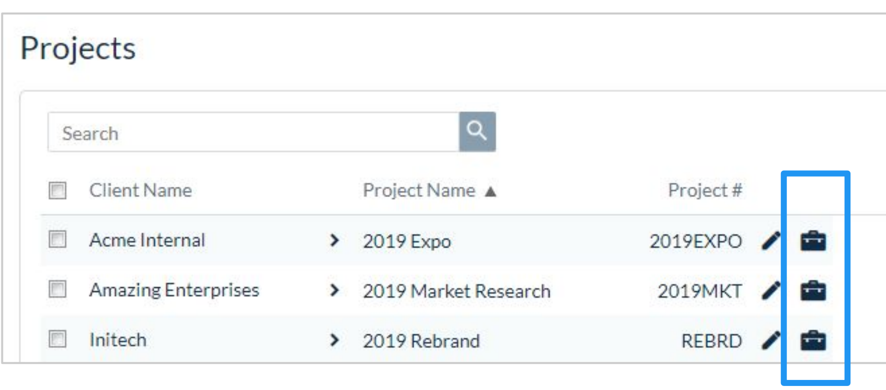
If you are using these controls, you can either set up Project Availability from the Project Detail page, the Division Detail page (when set to Moderate) or the Person Detail page (when set to Maximum).

Task Controls

The Task Controls 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.



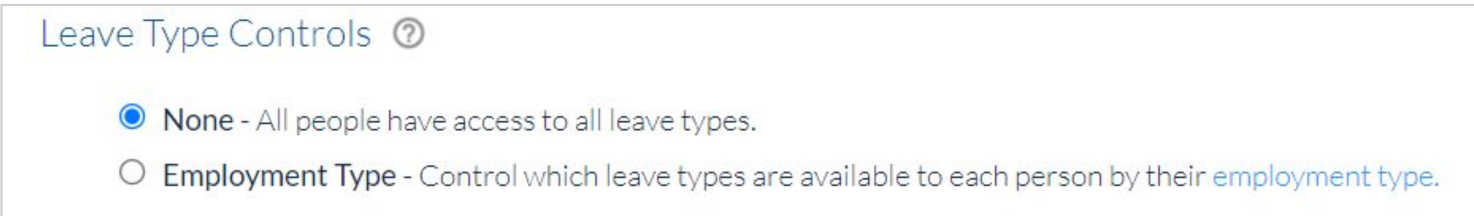
When turned on, you will see a "toolbox" icon on the Project and Task List view pages, which will take you to the "Task Availability" section of ClickTime.

Note Project and Task List Settings are available to Team plans and above. If after converting to a ClickTime customer you choose the "Starter" account type, the advanced Project and Task List Settings features will no longer be available.

List Settings for Time Entry

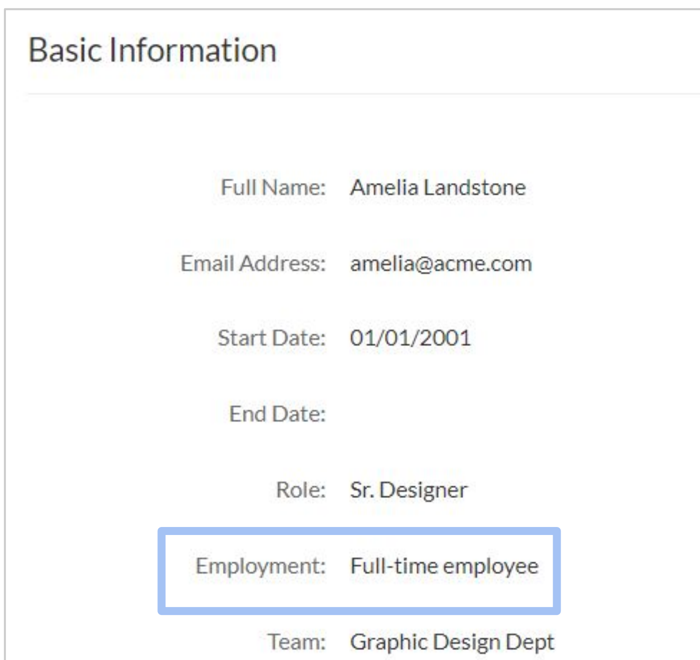
Leave Type Controls

The Leave Type Controls allow you to set up which types of Leave your employees can access.

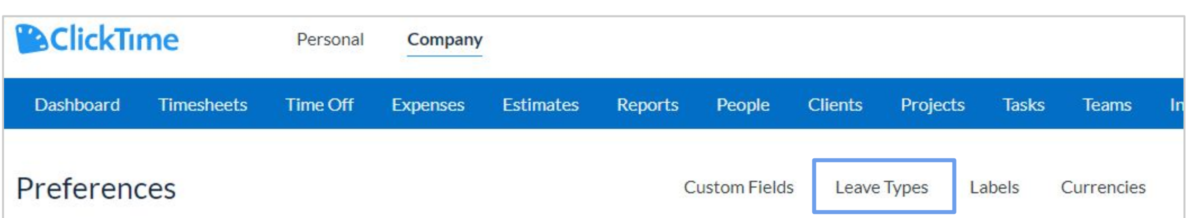


When set to “None” all employees will have access to all active Leave Types.

When set to “Employment Type” the Employment Type field (set on the Person Details page) will determine which types of Leave each employee can access.



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



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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