

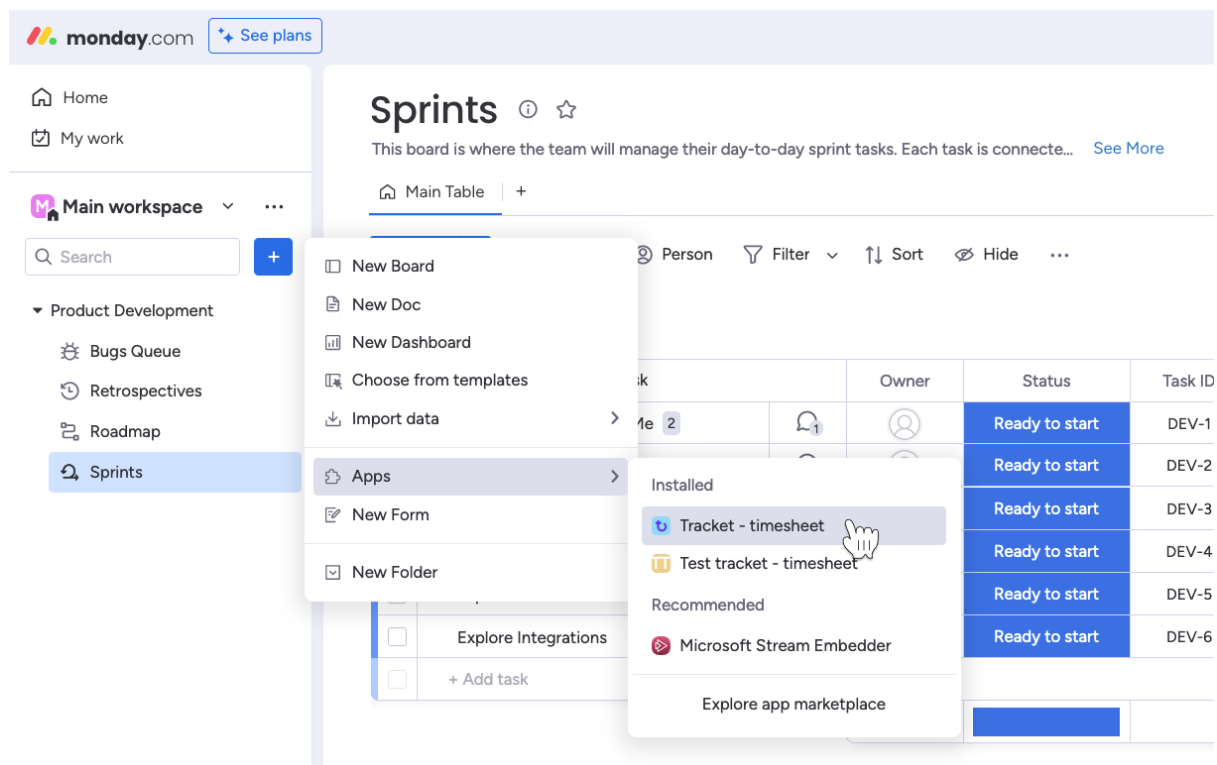
Tracket Step-by-step

1. Configuration

Installation

Install the app in the monday.com marketplace, then add the three main views to access Tracket:

1. On a board from which you want to log time, open an item. Click on the plus icon at the top of the expanded item to add the Tracket item view.
2. On a board that you work on a lot, you can add Tracket as a board view. You do this by clicking on the plus icon next to the other board views.
3. You can also add Tracket as a standalone object. In the monday.com menu bar on the left, click on the plus icon next to the search bar. Then choose 'Apps' and select Tracket.



Admin settings

Configure the following settings and tailor it according to your clients organization and needs:

Time entry template

Set in the template which fields are available and required when creating a time entry. In the category field you manage which activities can be billable.

People

Tracket works with the same teams as in your monday.com instance, make sure to configure the teams first and then come here.

Here you can manage your people: set their capacity per week, holiday schedules and permission level within Tracket, by navigating through the teams in the left menu.

The screenshot shows the Tracket interface within a monday.com workspace. The left sidebar contains navigation options: Home, My work, Main workspace (with a search bar and a plus button), Product Development (with sub-items: Bugs Queue, Retrospectives, Roadmap, Sprints), Tracket - timesheet (highlighted), and Dashboard. The main content area is titled 'Tracket - timesheet' and includes a top navigation bar with 'My timesheet', 'Team', 'Projects', 'Reports', and 'Admin'. Below this is a secondary navigation bar with 'Time entry template', 'People' (highlighted), 'Work schedules', 'Permissions', 'Approval process', 'Exports', 'Archive', and 'Billing'. The 'People' section is active, showing a list of people for the 'Test instance'. The list has columns for Name, Teams, Capacity per week, and Holiday schedule. Two people are listed: Allison Carter (40:00 capacity, United States holiday schedule) and Lauren Brown (32:00 capacity, United States holiday schedule). Search bars are provided for both names and teams.

Name	Teams	Capacity per week	Holiday schedule
Allison Carter	2 teams	40:00	United States
Lauren Brown	2 teams	32:00	United States

Work schedules

Select at which day the workweek starts and add holiday schedules relevant for the regions your people are active in.

Approval process

The screenshot shows the Monday.com interface. The top navigation bar includes the Monday.com logo, a 'See plans' button, and various utility icons. The left sidebar contains navigation options like Home, My work, Main workspace, and a search bar. The main content area is titled 'Tracket - timesheet' and features a sub-header 'Work schedules'. Below this, there is a 'Settings' section with a 'Week starts on' dropdown menu set to 'Monday'. There are 'Save changes' and 'Cancel' buttons. Further down, there is a 'Holiday schedules' section with a link to 'More about holiday schedules'. A text block explains that holiday schedules manage statutory holidays. Below this, there are year tabs for 2024, 2023, and 2022, with a blue 'Add holiday schedule' button. At the bottom, a table lists 'Active holiday schedules' with columns for 'Active holiday schedules' and 'People'. One entry is visible: 'United States' with '2 members' and a three-dot menu icon.

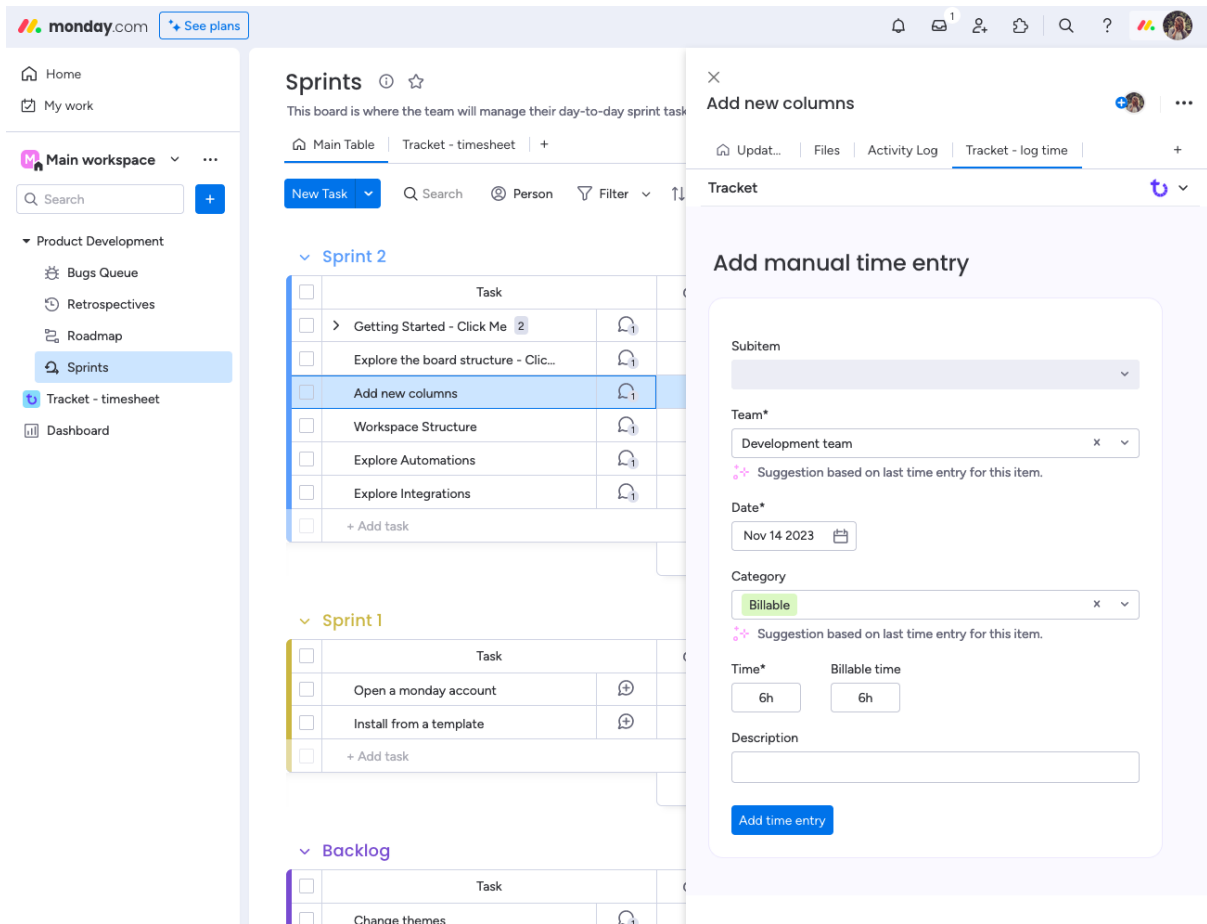
The approval functionality can be turned on or off here. You can also set whether each user can reopen their own timesheet when the timesheet has the status 'submitted'. This can be useful when a team member has made a mistake and wants to quickly correct it.

2. Logging time

With this set up every team member can log hours, either directly on a project or via the timesheet where they have a complete overview of their time spend throughout the week.

Add new time entry

Once the item view is installed, you can add time entries on all of items on a board. Select the item (or sub-item) you want to log work for, the item view opens on the right hand side. Select the Tracket view to make a time entry.



All time logged on the item will be listed in a table below the time entry form. In this form you can change time entries, but you can also apply filters and create an export.

My timesheet

My timesheet is a handy weekly overview that is available to every user. You can open the timesheet via the Tracked board view or via the separate Tracked object. The timesheet combines data of multiple boards in the same instance (example.monday.com).

As a user, you can work on multiple boards and workspaces and log your hours per items and/or subitems. When navigating to My Timesheet, these hours will become visible in a weekly overview. This is also where new time entries can be made, edited or deleted by each individual.

The screenshot shows the Monday.com Sprints board for the week of Nov 13 - Nov 19. The board is titled 'Sprints' and includes a summary section with the following data:

Status	Worked hours	Total	Billable hours
Open	16h / 32h	50%	10h

Below the summary is a table showing task details and time allocation:

	Total	Mon 13 Nov	Tue 14 Nov	Wed 15 Nov	Thu 16 Nov	Fri 17 Nov
<input type="checkbox"/> Sprints		+	+	+	+	+
<input type="checkbox"/> Add new columns Billable	10h	4h	6h			
<input type="checkbox"/> Roadmap <input type="checkbox"/> Customer Success Focus Non-billable	4h	4h				
<input type="checkbox"/> Roadmap <input type="checkbox"/> New Database Schema Deployment Billable	2h		2h			
	16h	8h	8h			

User settings

The user settings can be found by clicking on the Settings button in the Tracket menu. Here users can set how the time logged with the timer is completed and which notifications they want to receive. With notifications in Tracket, team members and team admins are informed on changes in the approval process. Notifications are shown in the Tracket application and can also be sent by email.

3. Managing your team's time and reporting

Within the Admin settings of Tracket, particular team members can be granted the permission level "Team Admin" within the Tracket application. With this, they have access to all their team's hours on both a team- and individual level. This allows the use of more functionality, namely the following:

Team - Approvals

On the Approval page you will find an overview of the timesheet statuses per team. As a team admin or monday.com admin, you can see which timesheets are still open and which are ready for approval. You can quickly approve or reject a timesheet via the table, but you can also click through to the timesheet to view the details.

Team - Timesheets

Here you can review all timesheets of your team members and make/edit/delete time entries on their behalf if needed. It's the same overview as 'My Timesheet', except that it is not yours.

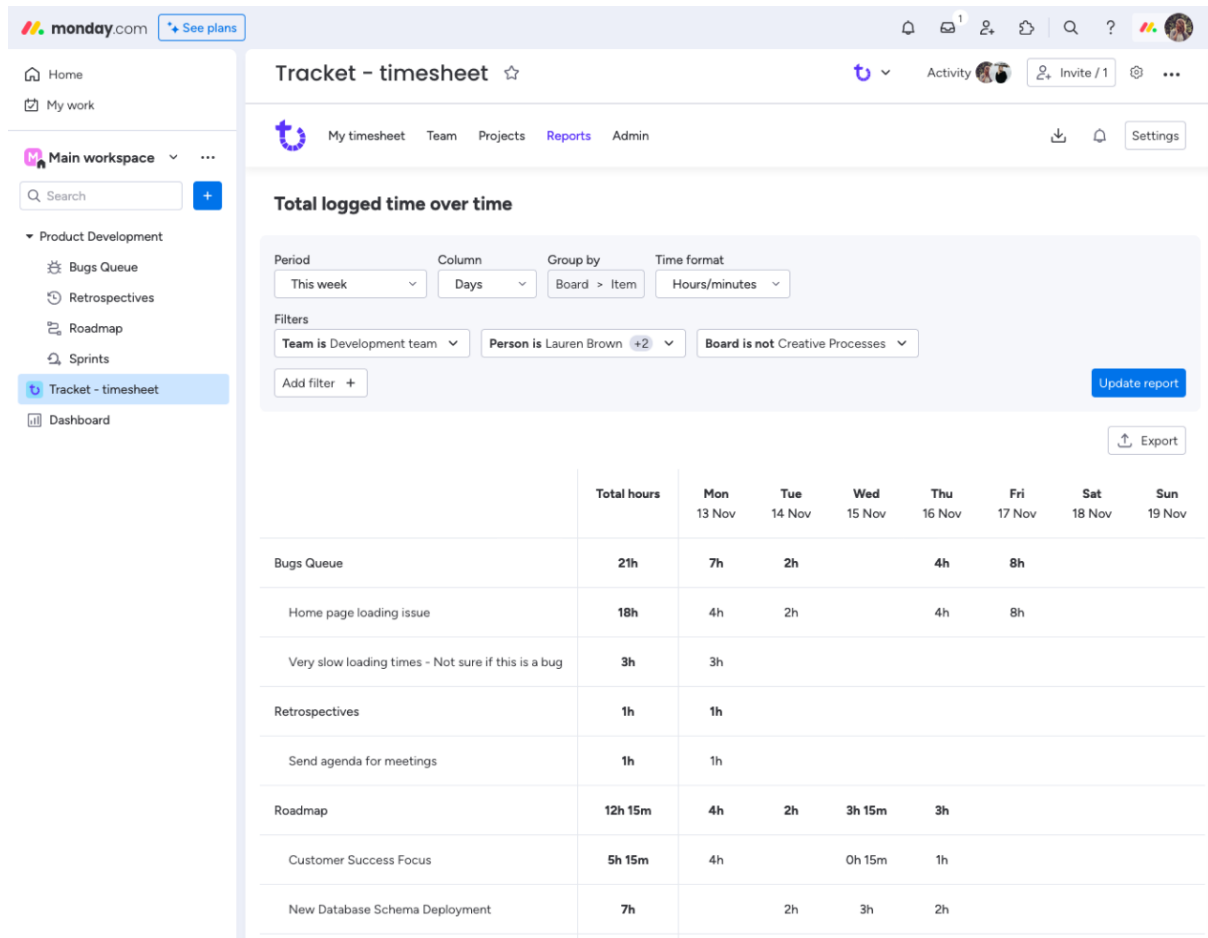
The screenshot shows the Monday.com interface for a team timesheet. The sidebar on the left contains navigation items: Home, My work, Main workspace (with a search bar and a plus button), Product Development (with sub-items: Bugs Queue, Retrospectives, Roadmap, Sprints), Tracket - timesheet (highlighted), and Dashboard. The main content area is titled 'Tracket - timesheet' and includes a user selector (Allison Carter), a date range selector (This week, Nov 13 - Nov 19), and a 'Submit timesheet' button. A summary card displays: Status: Open, Worked hours: 40h / 40h, Total: 100%, and Billable hours: 21h. Below the summary is a table with columns for Total, Mon 13 Nov, Tue 14 Nov, Wed 15 Nov, Thu 16 Nov, and Fri 17 Nov. The table lists tasks with their durations and billable status.

	Total	Mon 13 Nov	Tue 14 Nov	Wed 15 Nov	Thu 16 Nov	Fri 17 Nov
		+	+	+	+	+
<input type="checkbox"/> Bugs Queue <input checked="" type="checkbox"/> Home page loading issue Billable	18h	4h	2h		4h	8h
<input type="checkbox"/> Bugs Queue <input checked="" type="checkbox"/> Very slow loading times - Not sure if this is a bug Billable	3h	3h				
<input type="checkbox"/> Retrospectives <input checked="" type="checkbox"/> Send agenda for meetings Non-billable	1h	1h				
<input type="checkbox"/> Sprints <input checked="" type="checkbox"/> Explore Integrations Non-billable	18h		6h	8h	4h	
	40h	8h	8h	8h	8h	8h

Reports

Create insightful and useful reports for different teams, persons and projects. You can adjust the time period, table display and groupings, among other things. In addition, there

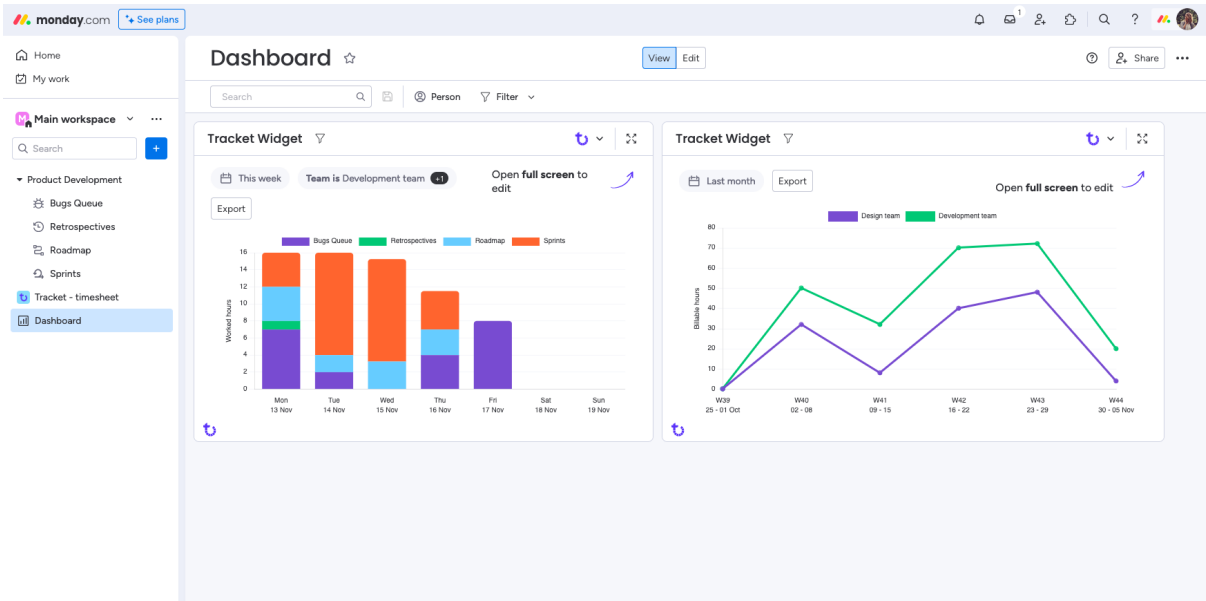
are many filter options and everything combined gives you exactly the data you want to report on.



Widgets

Prefer a visual way of reporting? There are Tracket widgets available to add on a Dashboard, go to "Add Widget" and select "Apps", that's where you will find "Tracket Widget". This allows you to generate widgets that visualize the time spent and these are kept up-to-date automatically.

You can choose from two types of charts: bar charts and line charts. You choose what you want to see on the x and y axis, use the filters to select the desired data set and with the 'Group by' functionality you add even more layers to your chart.



For a more in depth guide covering all details to use Tracked, please visit: [Tracked](#)