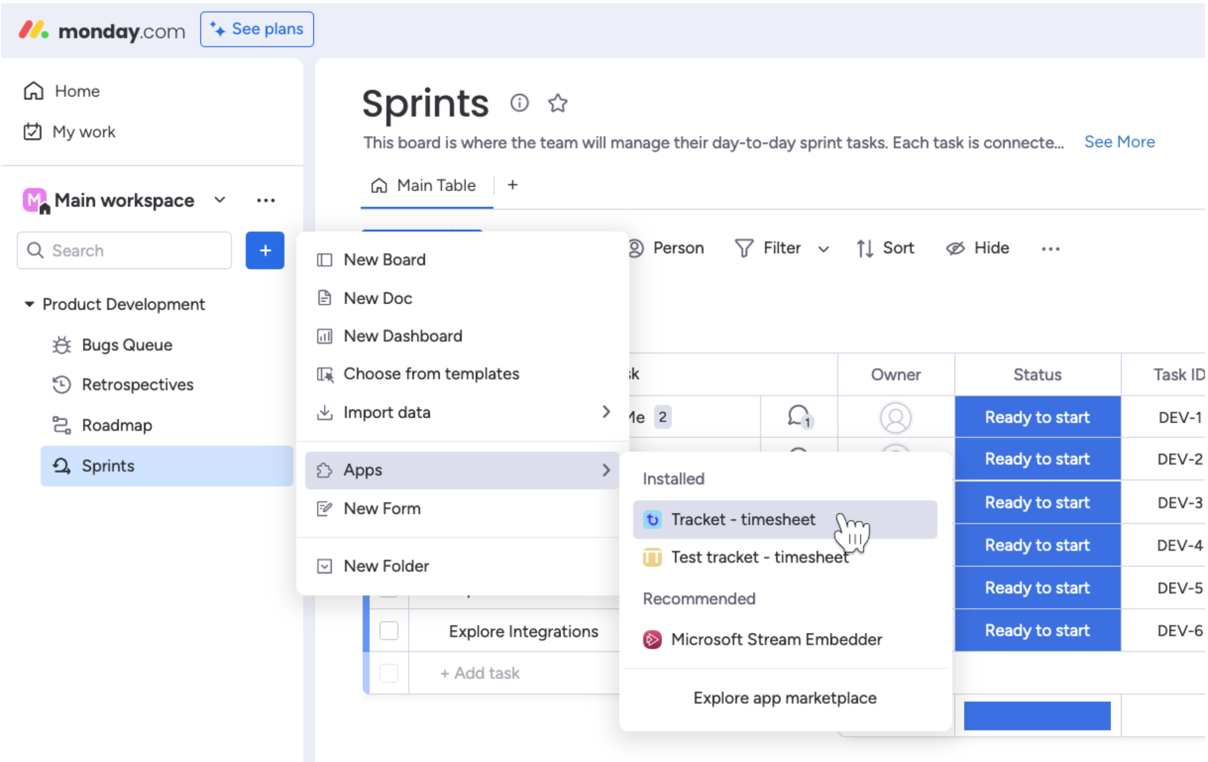
Tracket Step-by-step

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:

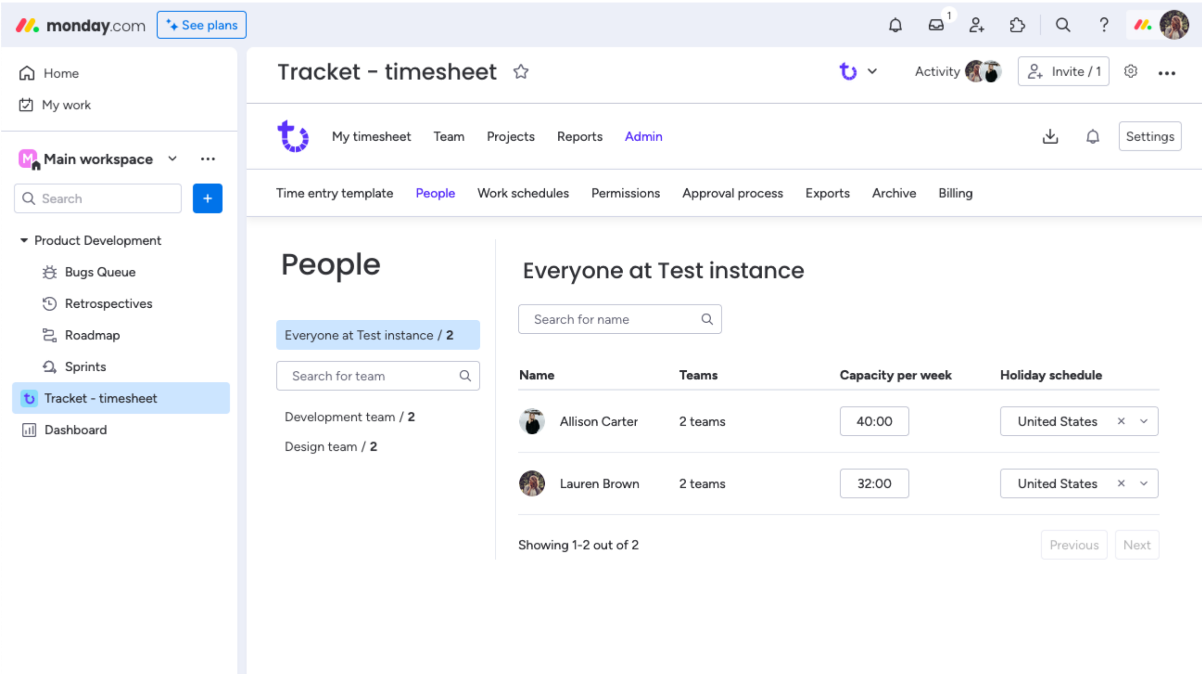
Time entry template

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.

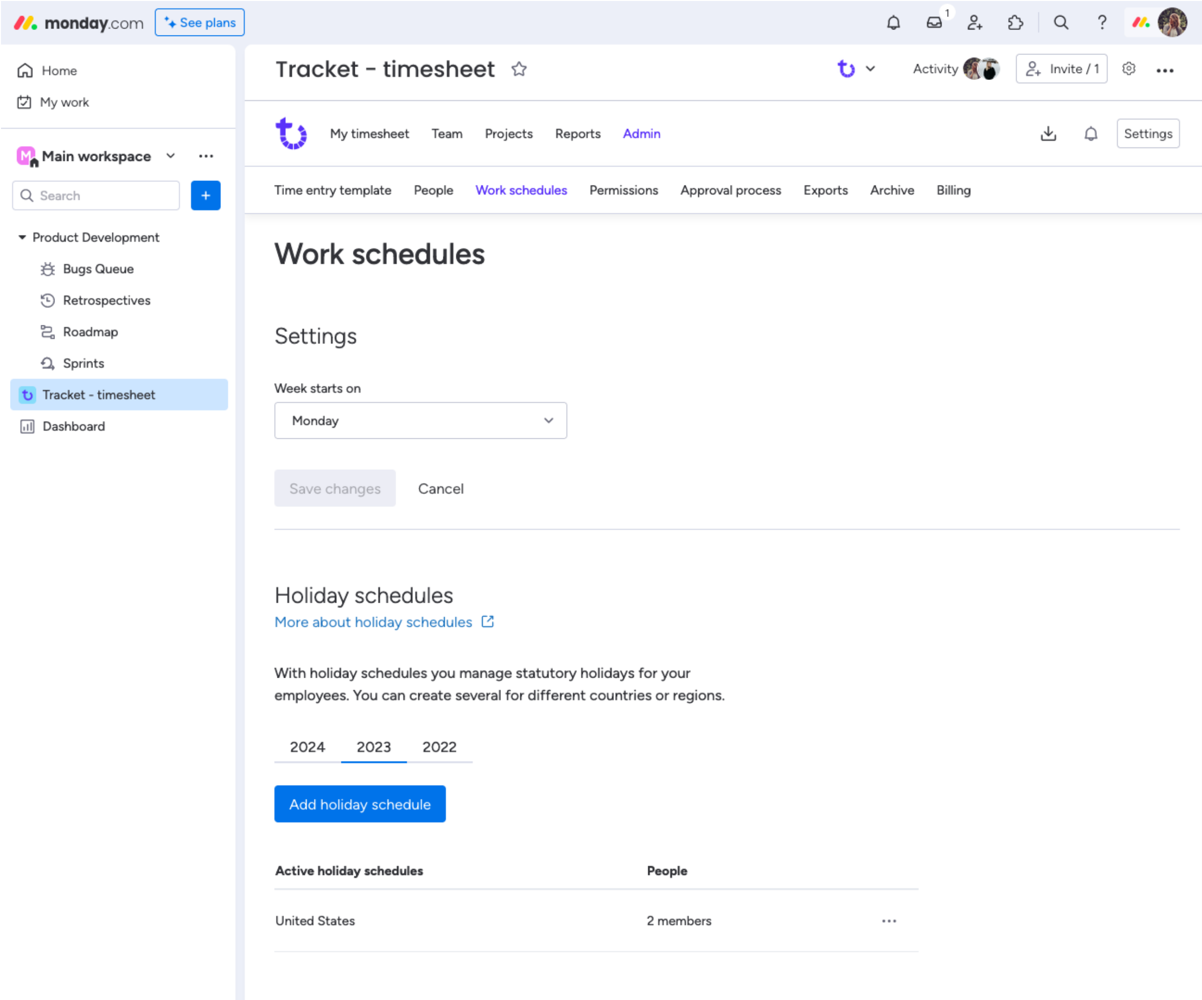
Here you can manage your people: set their capacity per week, holiday schedules and permission level within Tracket, by navigating through the teams in the left menu.



Work schedules

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

Approval process



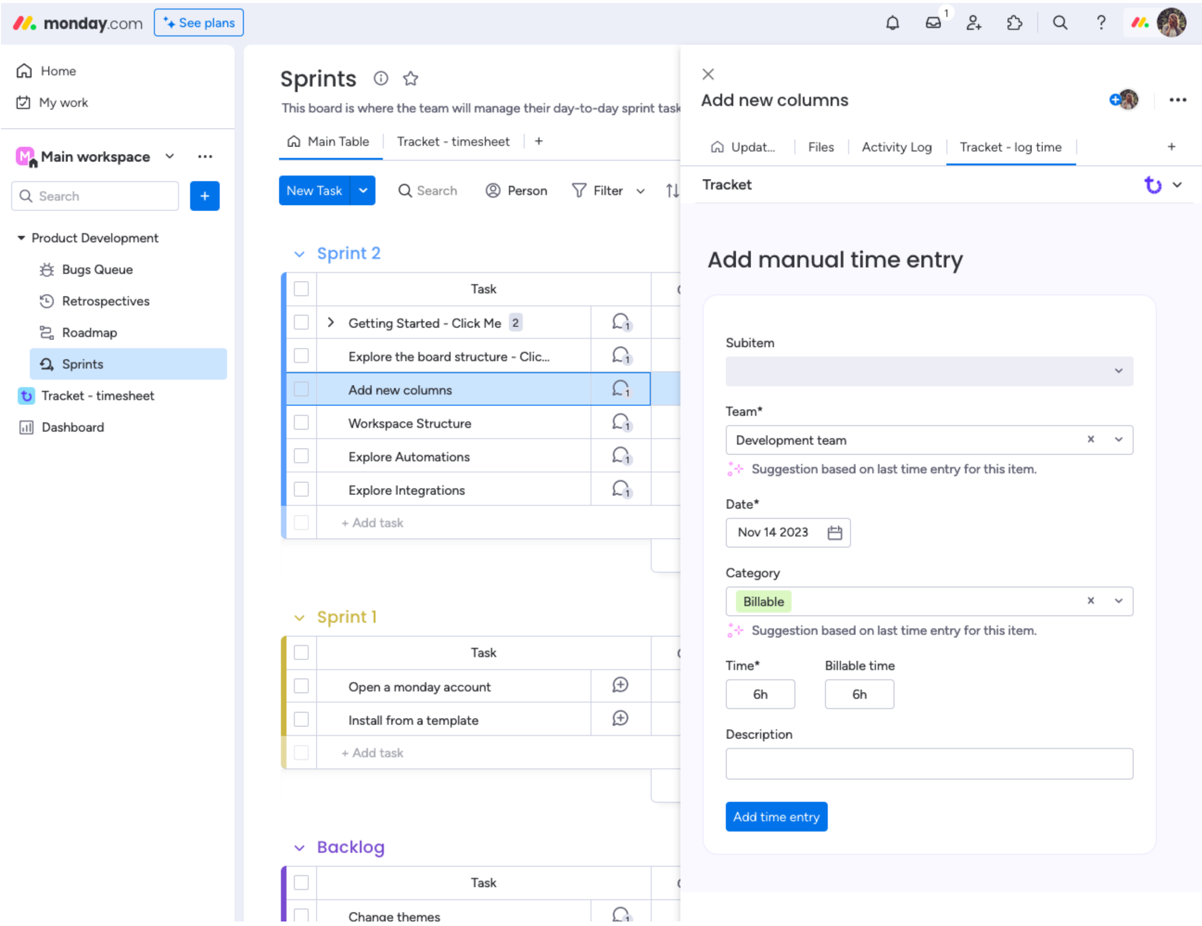
The approval functionality can be turned on or off here. You can also set whether each user can reopen their own timesheet when the timesheet has the status 'submitted'. This can be useful when a team member has made a mistake and wants to quickly correct it.

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.

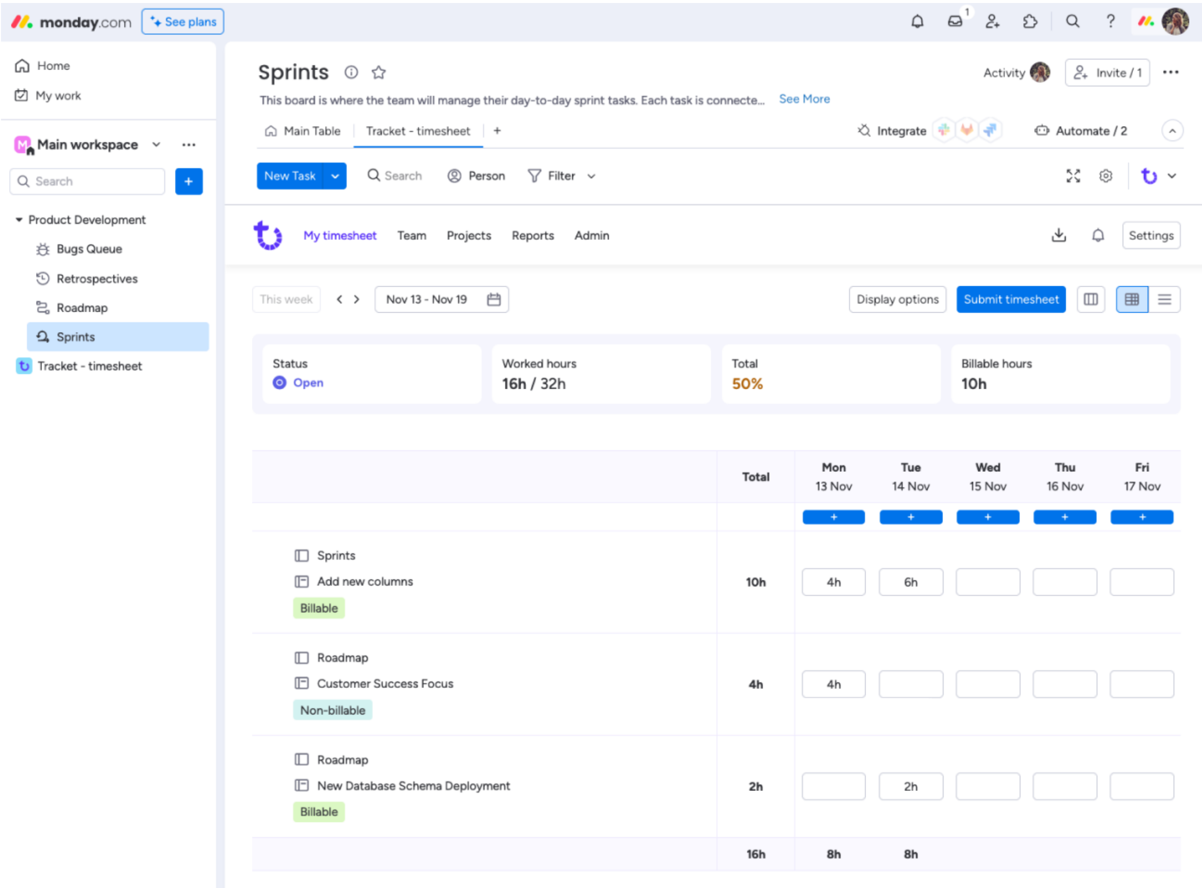


All time logged on the item will be listed in a table below the time entry form. In this form you can change time entries, but you can also apply filters and create an export.

My timesheet

My timesheet is a handy weekly overview that is available to every user. You can open the timesheet via the Tracket board view or via the separate Tracket 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.



User settings

The users 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

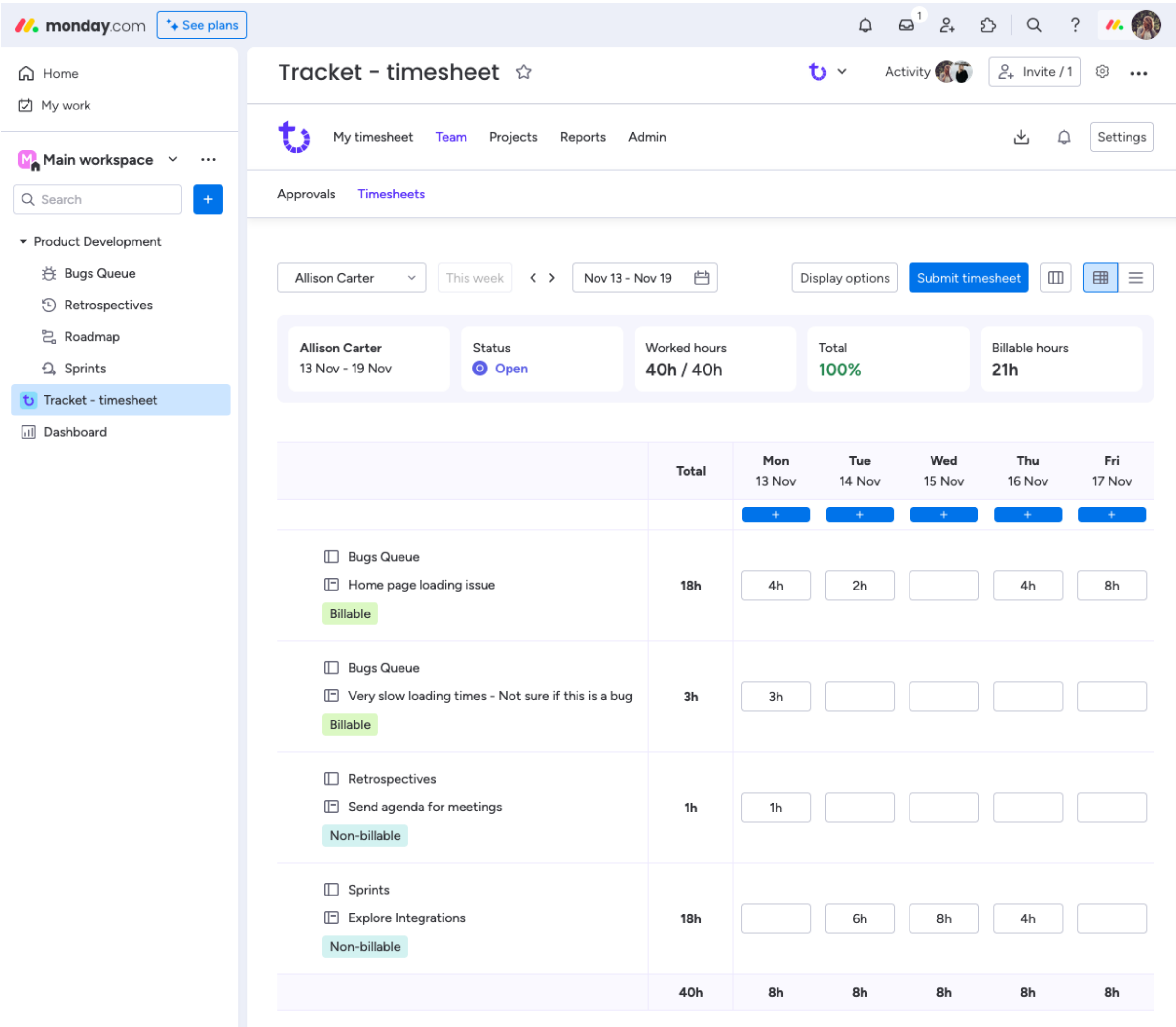
Within the Admin settings of Tracket, particular team members can be granted the permission level "Team Admin" within the Tracket application. With this, they have access to all their teams hours on both a team- and individual level. This allows the use of more functionality, namely the following:

Team - Approvals

On the Approval page you will find an overview of the timesheet statuses per team. As an 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.

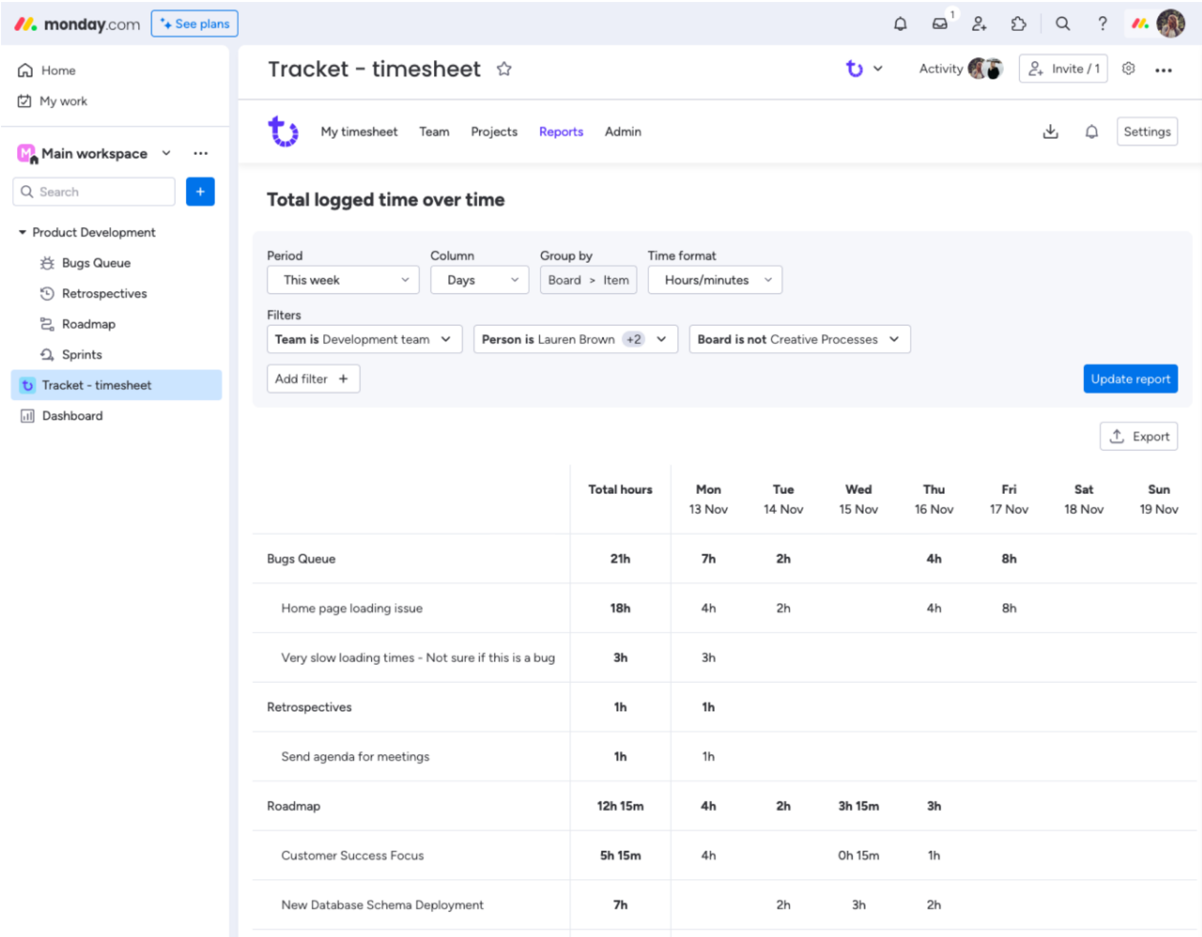
Team - Timesheets

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.



Reports

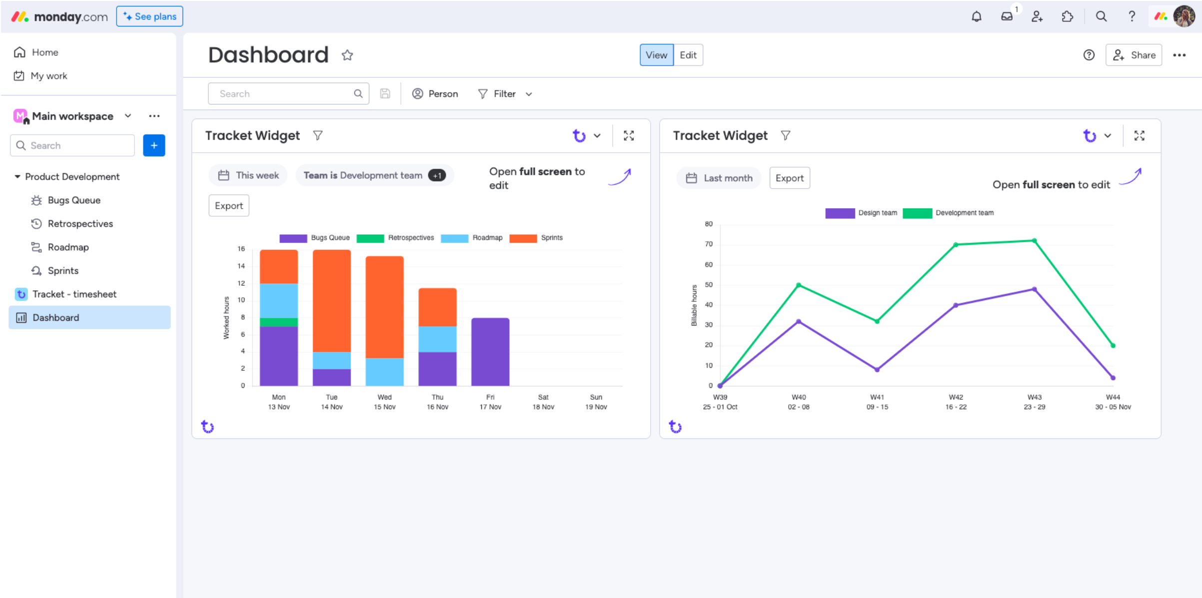
Create insightful and useful reports for different teams, persons and projects. You can adjust the time period, table display and groupings, among other things. In addition, there are many filter options and everything combined gives you exactly the data you want to report on.



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 Tracket, please visit: Tracket