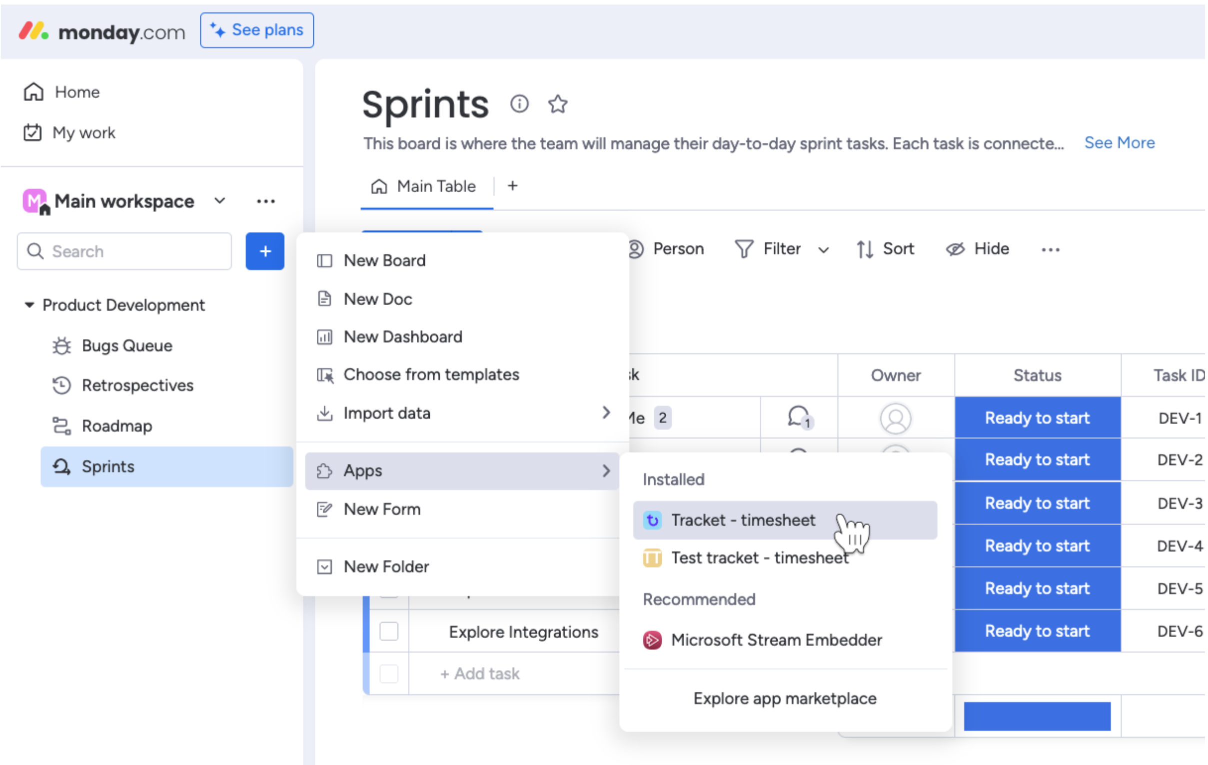
# Tracket Best Practices

## How to Best Configure Tracket?

### Are you the admin?

*Installation*:

- We recommend adding the standalone object so that Tracket is more easily accessible from your monday menu.
- We recommend adding the item view to the boards where you work frequently.
- We recommend adding the board view to boards where you collaborate with guests who also need to log time.



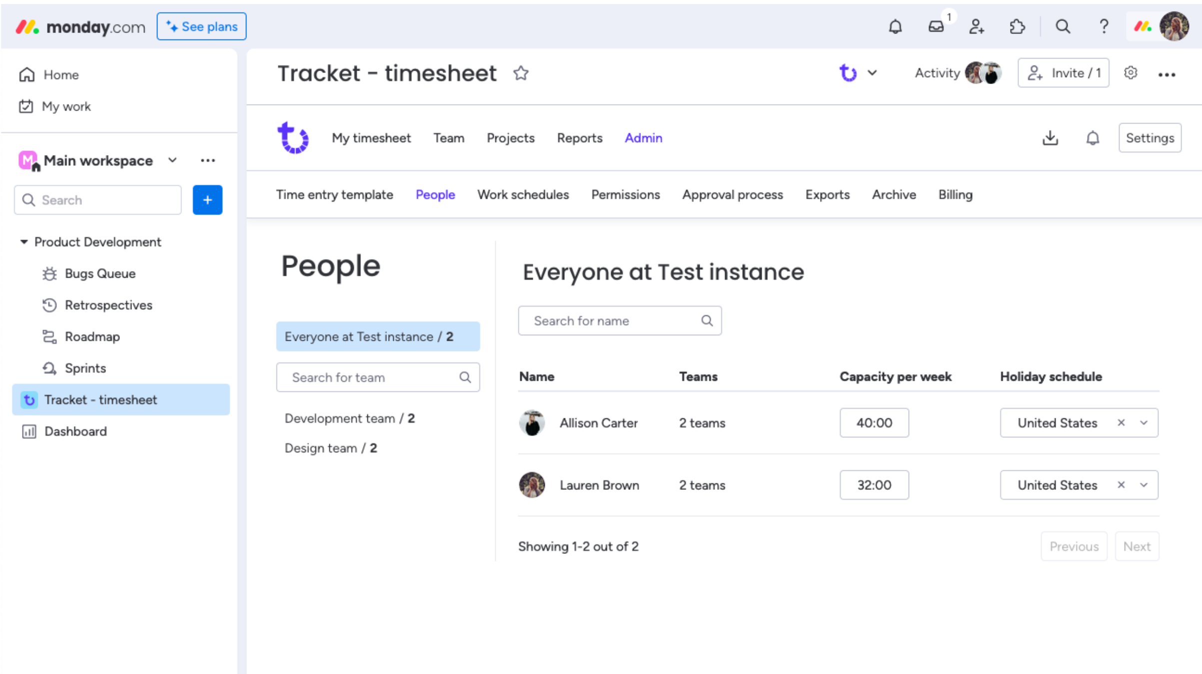

*Time Entry Template*:

- Fields you can configure yourself include the category and custom fields.
- When you want to specify if the work done is billable or not, we recommend using the category as work types.
- Tip: If the name of your Monday column matches a category or custom field name, and a corresponding value is found in both, we can automatically fill in the time entry for you, simplifying the process.
- We recommend setting a custom field option as default when it is often used.

- We recommend using custom fields when you have additional data to report and want to add it to the time entry.

*People*:

- We recommend using monday teams.
- We recommend assigning one user from each team as a team admin on the people page, responsible for checking time sheets.
- We also recommend adding a weekly capacity for each user, making it easier to check if someone has logged all their hours.
- We recommend setting holiday schedules for the right region so that the capacity is correct in a week with holidays.
- The approval process is used by most of our users, but it can be turned off if you prefer to use Tracket for personal insights rather than billing or other administrative tasks.

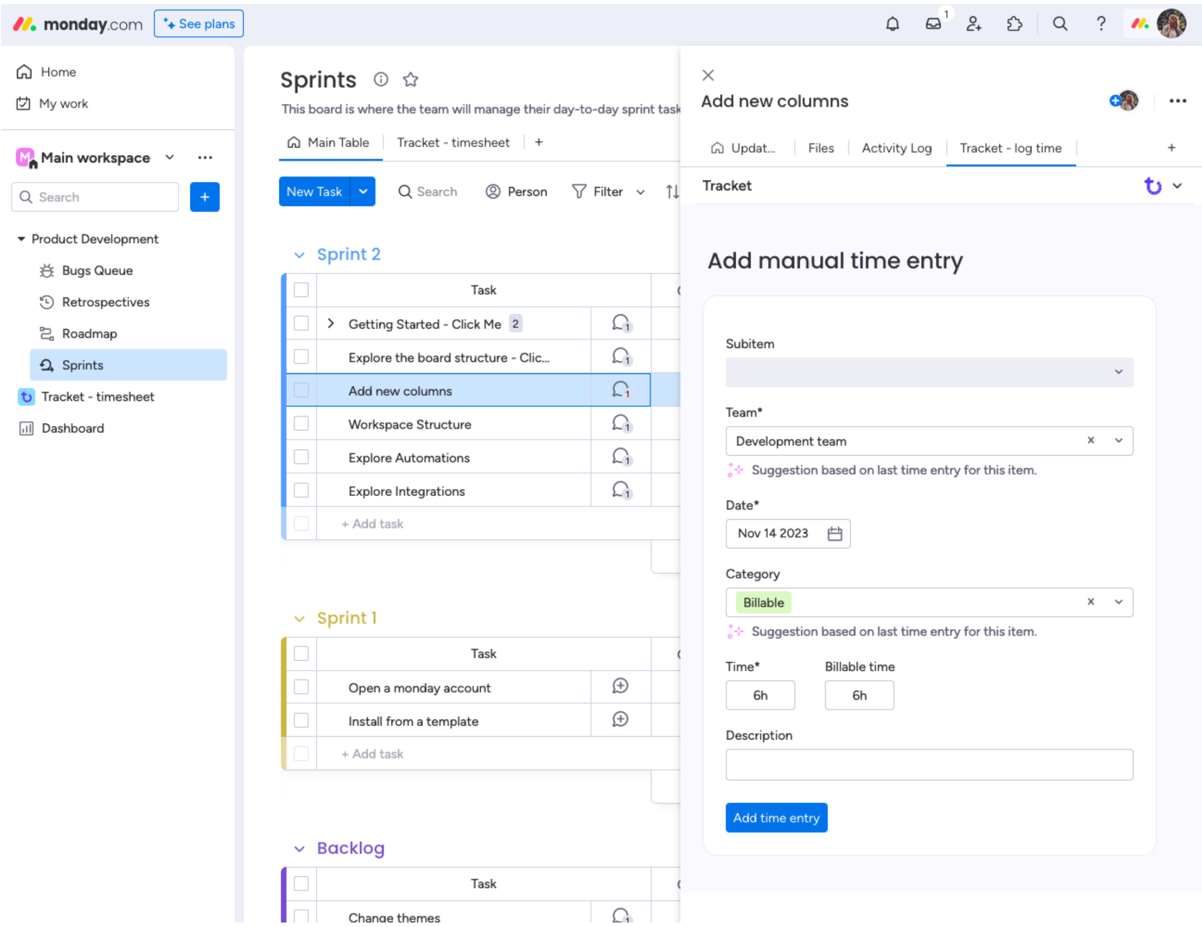


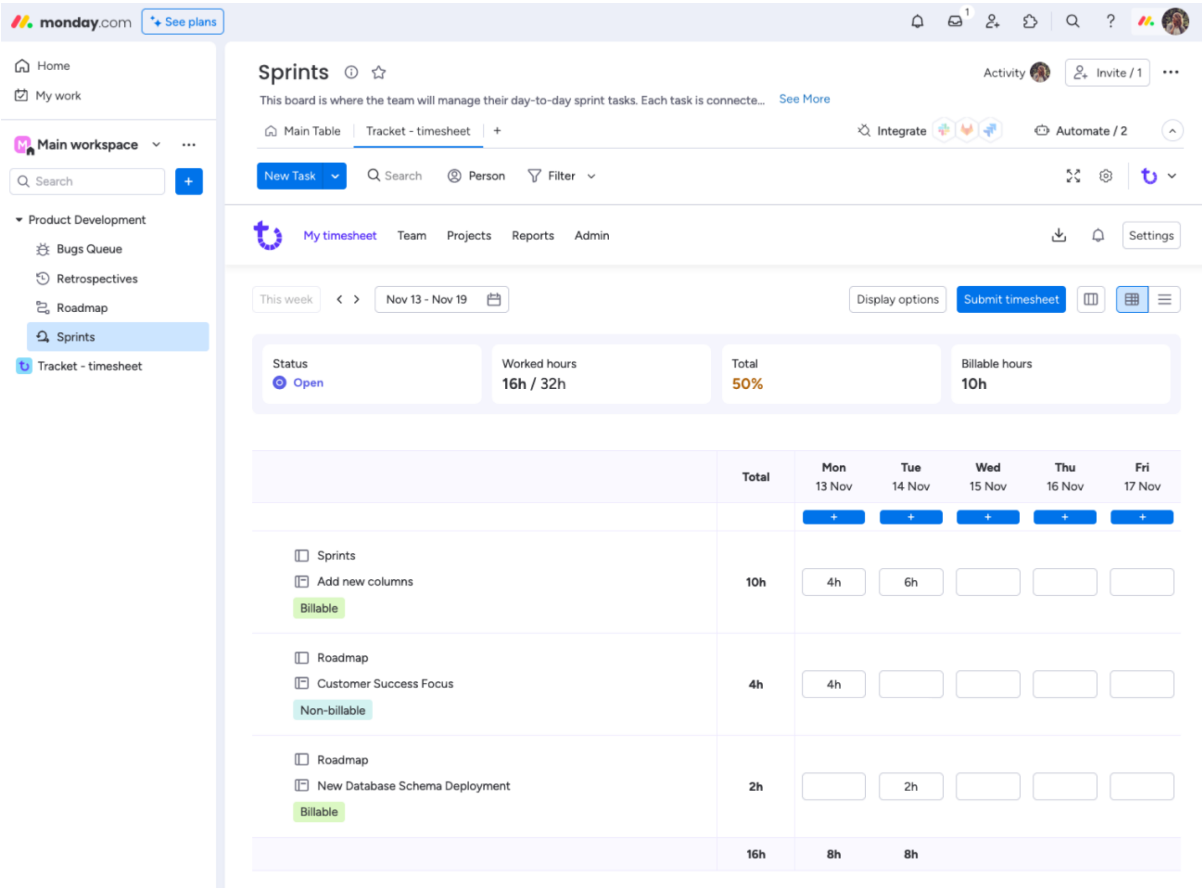

**Are you the time-tracker?**

- We recommend setting a roundup for your times if you use the clock timer. It makes logging whole numbers easier.
- We recommend turning on email notifications for when your timesheet is reviewed so you don't forget to submit your timesheets to your team admin.

## How to Best Log Time?

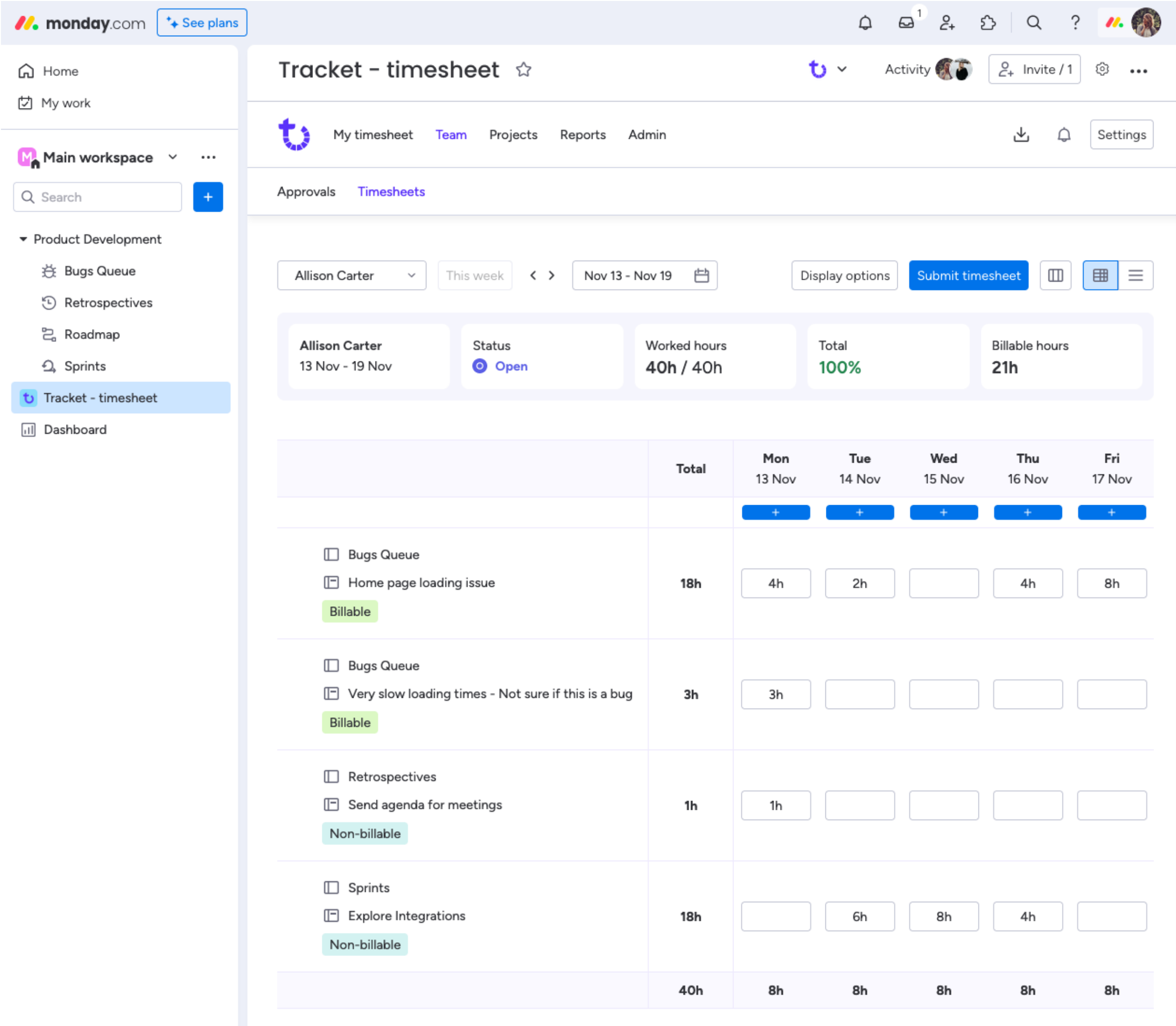
- We recommend using the timer when you need to log time precisely or change tasks throughout the day. You can start the timer on the item view, which is easier when you are already working on the item. You can also start a timer from your timesheets on existing rows, which is handy if you work on similar tasks every week. You can keep the timesheet view always open in a tab in your browser.
- When switching tasks during the day, we recommend manually logging time in the item view, as it is probably more accessible.
- When logging time at the end of the day or week, we recommend using your timesheet. This gives you a complete overview of your week and a good insight into your daily and weekly capacity and any gaps.






## How to Best Approve Timesheets?

- We recommend reviewing your team’s timesheet every week, as it is one of the best ways to provide insights into employee wellbeing. This helps prevent burnout and fosters meaningful dialogue between manager and employee.
- As a team admin, you can activate notifications when a timesheet is submitted and receive a weekly summary of all team members’ timesheets.
- We recommend adding a clear description when rejecting a timesheet so your employee knows how to fix it.



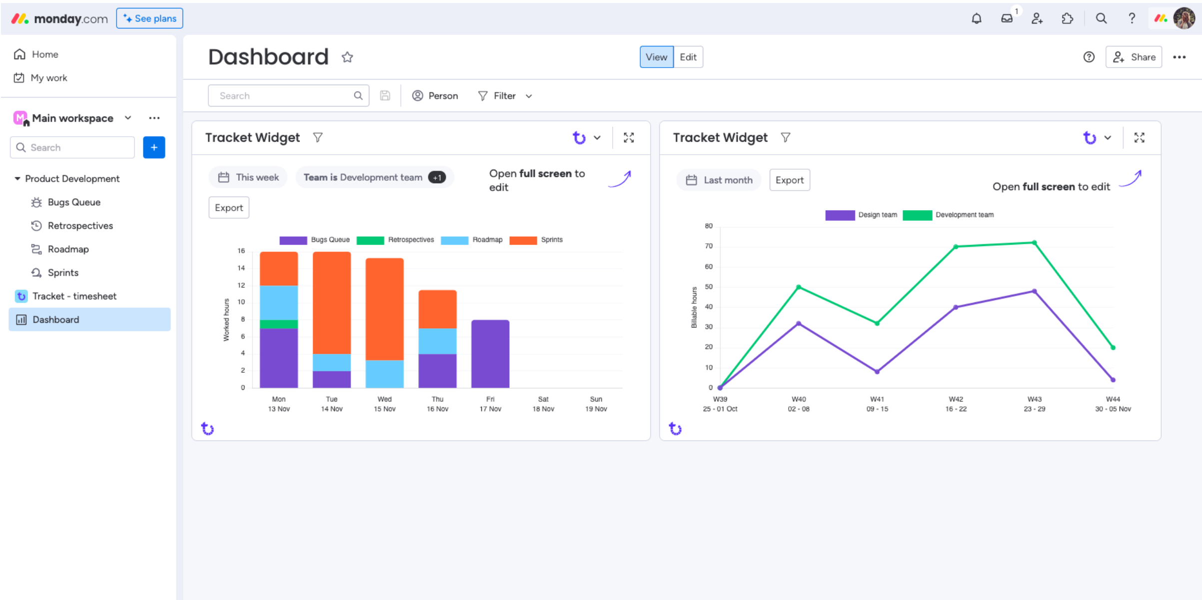

## How to Best Analyze Tracked Time?

- We recommend having a clear understanding of your needs and goals for reporting. You can set up widgets and reports according to those needs because they are very flexible and can tell you about project progress, team performance, and the ratio of billable to non-billable hours.

*Widgets*

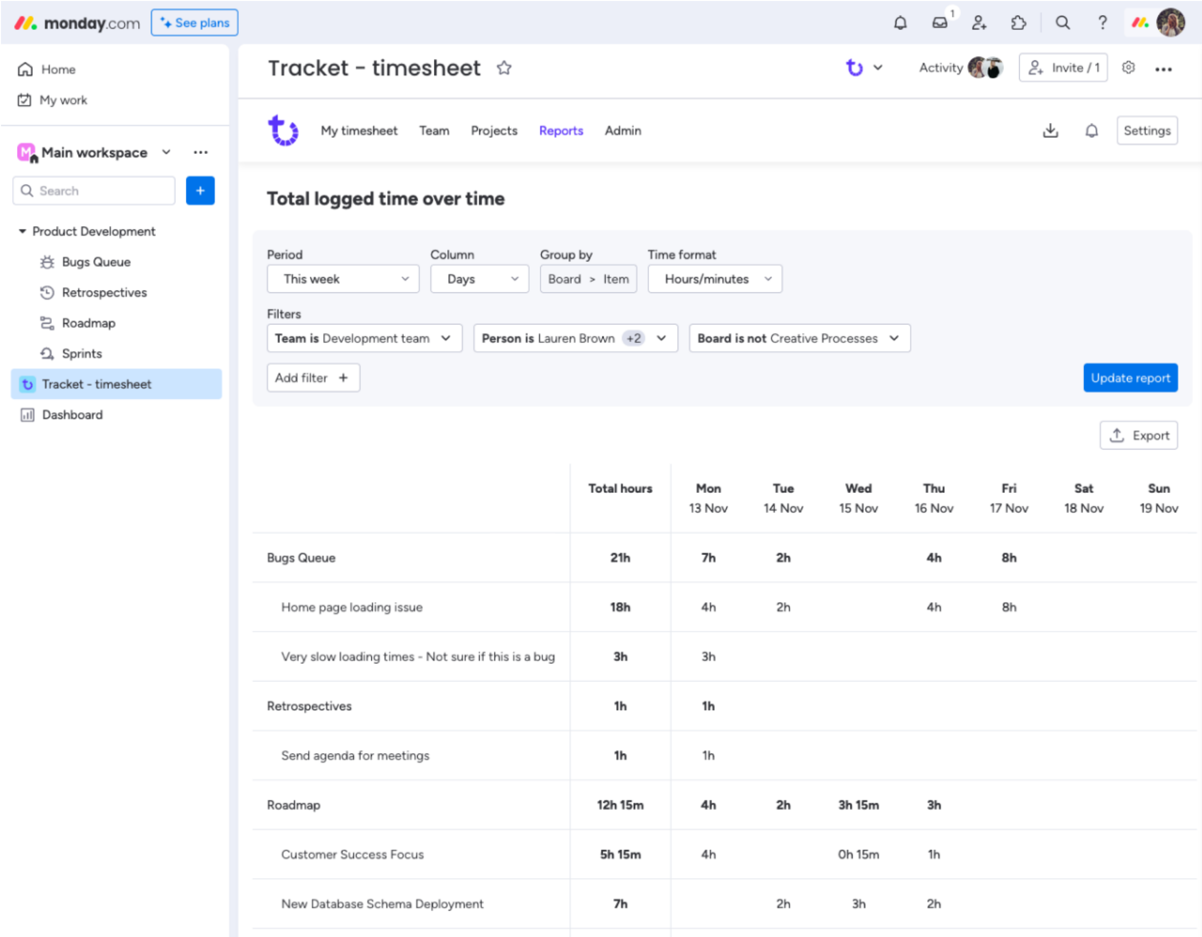
- We recommend using widgets to report on billable hours.
- We suggest using widgets for simple, easy-to-visualize data, as a chart with fewer data points is easier to read.
- Widgets are easiest to understand when they are simple and have fewer data points.
- When selecting a time period, such as 'this week' or 'last month', the chart will consistently show accurate data without requiring updates to its settings.

- Tip: Everyone with access to the Monday dashboard views the same chart. Therefore, if you invite someone who doesn't have permission in Tracket to see data from another team, they will still be able to see it on the dashboards. This is because the displayed data reflects what the chart's creator has access to.




*Reports*

- We recommend using reports for deeper insights compared to widgets.
- The group-by functionality is very powerful and provides in-depth insights.
- Reports make it easier to change filters and periods to check and compare.




## How to Best Extract Data?

- We recommend using Excel export to share the reports you have created.
- If you need to share all the time entries that make up the report, you can export it as a CSV and get a list of entries.
- When you need data from Tracket in your Monday board to connect with other columns, you can use integrations.
- We see that customers often want to compare planned and logged time for an item. In that case, you should make a column for planned hours and fill it in. Our integration can fill in all logged hours in a column next to it. By adding a formula column, you can calculate the remaining hours.
- Tip: You can also set up this integration for subitems and, with the “show summary on parent item” functionality from Monday, easily sum up the time logged on subitems on the parent item, which is helpful when an item is a project.
- To calculate costs using hourly rates and time, you can use the time entry integration on specific boards. This integration creates a new item for each time entry. You can link boards containing data such as hourly rates, enabling necessary calculations and transferring the results to other boards.