

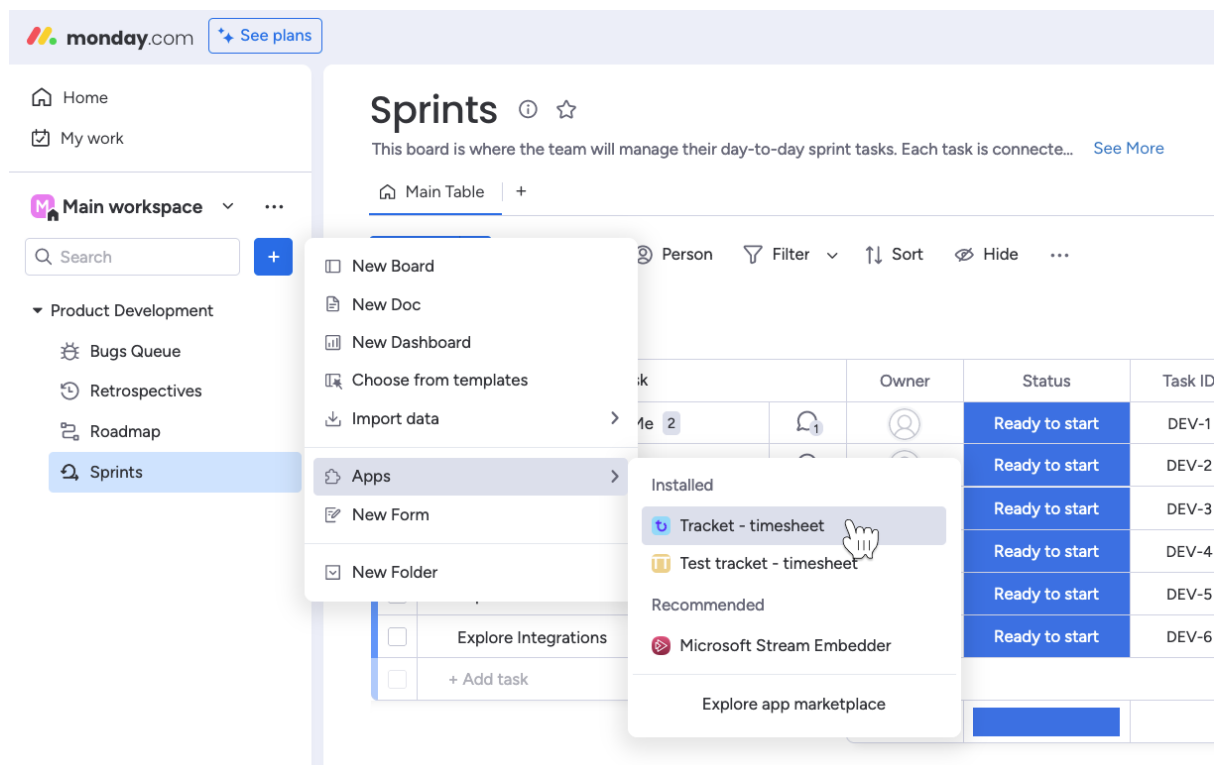
Tracket Best Practices

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.

The screenshot shows the Tracket - timesheet interface. The left sidebar contains navigation options: Home, My work, Main workspace, and a search bar. Under 'Product Development', there are links for Bugs Queue, Retrospectives, Roadmap, Sprints, and Tracket - timesheet (which is highlighted). The main content area is titled 'Tracket - timesheet' and includes a search bar and a 'Settings' button. Below this, there are tabs for 'Time entry template', 'People', 'Work schedules', 'Permissions', 'Approval process', 'Exports', 'Archive', and 'Billing'. The 'People' section is active, showing a list of users for 'Everyone at Test instance / 2'. The list includes Allison Carter and Lauren Brown, both with a capacity of 40:00 and 32:00 respectively, and a holiday schedule of 'United States'. The interface also shows a search bar for names and teams, and pagination controls at the bottom.

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.

The screenshot displays the Monday.com interface. On the left is a navigation sidebar with options like Home, My work, Main workspace, and Product Development. The main area shows a 'Sprints' board with columns for 'Sprint 2', 'Sprint 1', and 'Backlog'. A modal window titled 'Add manual time entry' is open over the 'Add new columns' task in the 'Sprint 2' column. The modal contains the following fields:

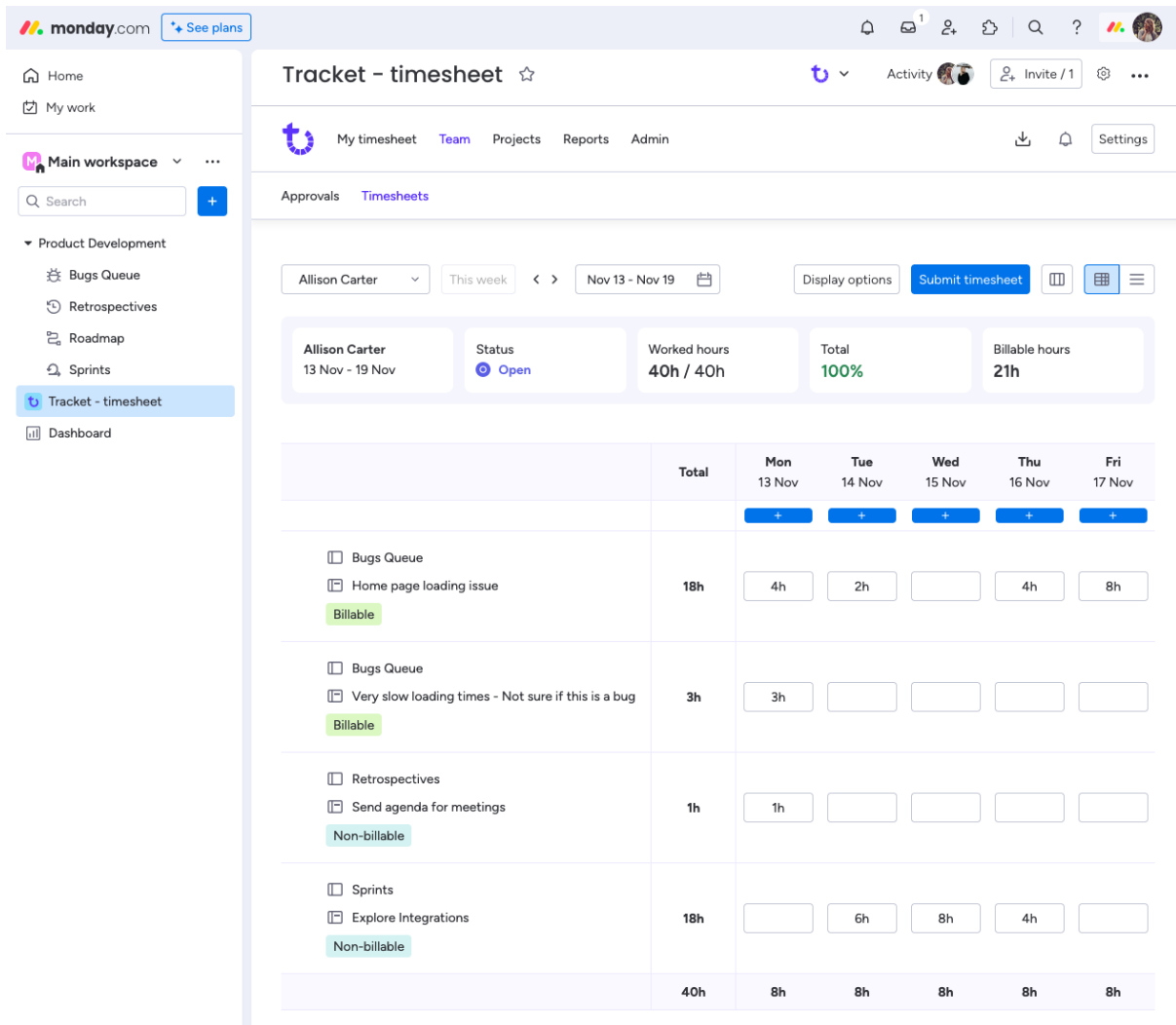
- Subitem:** A dropdown menu.
- Team*:** A dropdown menu with 'Development team' selected.
- Date*:** A date picker set to 'Nov 14 2023'.
- Category:** A dropdown menu with 'Billable' selected.
- Time*:** A field with '6h' entered.
- Billable time:** A field with '6h' entered.
- Description:** A text input field.
- Add time entry:** A blue button at the bottom.

The screenshot shows the Monday.com Sprints board for a team named 'Tracket - timesheet'. The board is titled 'Sprints' and provides a summary of the team's progress. The status is 'Open', and the worked hours are 16h out of a 32h sprint. The billable hours are 10h. The board includes a table with columns for days of the week (Mon 13 Nov, Tue 14 Nov, Wed 15 Nov, Thu 16 Nov, Fri 17 Nov) and rows for tasks. The tasks are categorized as 'Sprints', 'Roadmap', and 'New Database Schema Deployment'. The total hours for each task are listed in the 'Total' column.

	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			

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.



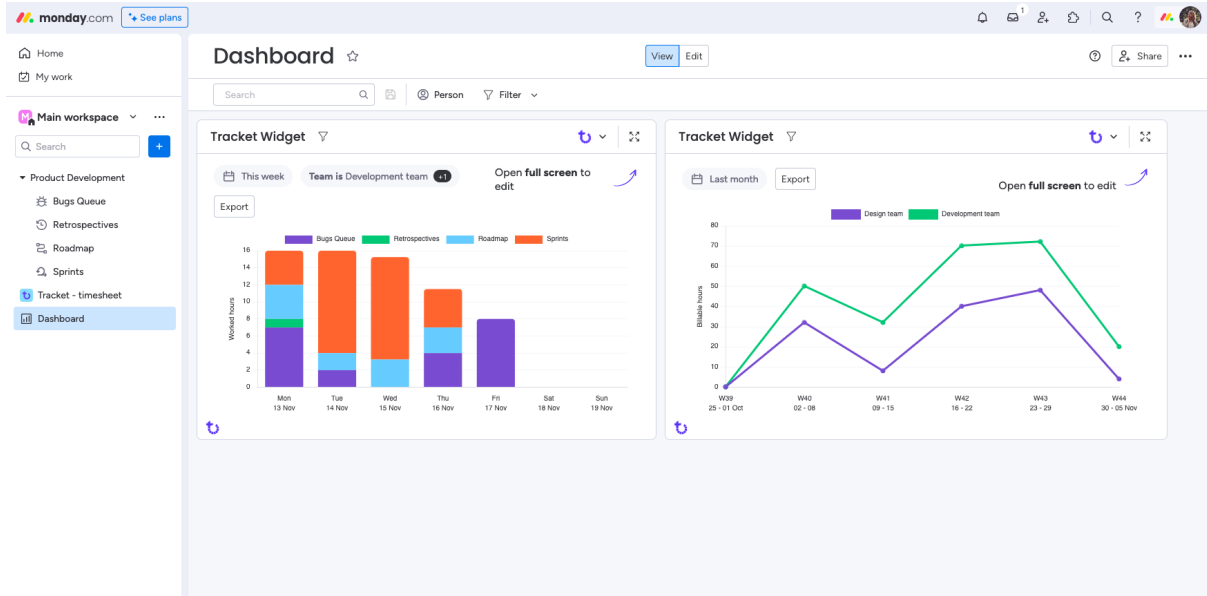
How to Best Analyze Tracked Time?

- 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.

The screenshot shows the Monday.com interface for a 'Tracket - timesheet' report. The report displays 'Total logged time over time' for the week of November 13-19, 2023. The data is grouped by item and filtered for the Development team, person Lauren Brown, and excluding Creative Processes. The table below represents the data shown in the report.

	Total hours	Mon 13 Nov	Tue 14 Nov	Wed 15 Nov	Thu 16 Nov	Fri 17 Nov	Sat 18 Nov	Sun 19 Nov
Bugs Queue	21h	7h	2h		4h	8h		
Home page loading issue	18h	4h	2h		4h	8h		
Very slow loading times - Not sure if this is a bug	3h	3h						
Retrospectives	1h	1h						
Send agenda for meetings	1h	1h						
Roadmap	12h 15m	4h	2h	3h 15m	3h			
Customer Success Focus	5h 15m	4h		0h 15m	1h			
New Database Schema Deployment	7h		2h	3h	2h			

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.