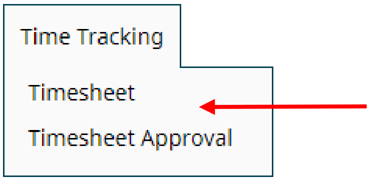
Accolade Time Tracking Quick Reference

Tracking Time Spent on Projects

Accessing Your Timesheets



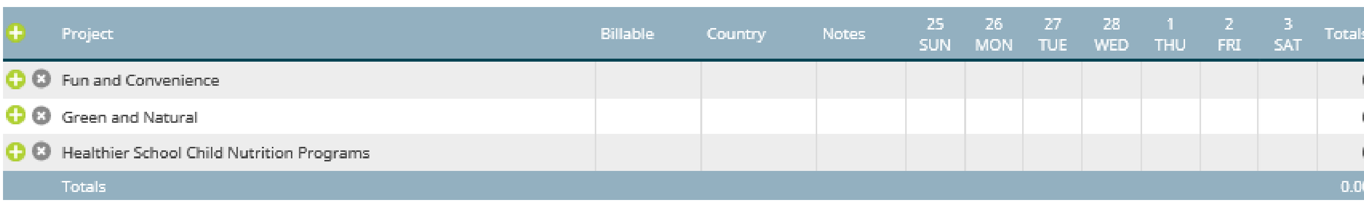
Access your current, past, and future timesheets from the **Time Tracking** menu.

Use the arrows or the icon to navigate to the correct timesheet.

Logging Time to Projects

1. From the **Time Tracking** menu, select **Timesheet**.
2. Enter your time in the appropriate days for the hours you spent on each project, and any additional fields that are unique to your timesheet implementation.

   Be sure to enter time in the unit of measure (hours, days, etc.) that is set for your company.
3. Click **Apply** to save the timesheet, without submitting.



Project	Billable	Country	Notes	25 SUN	26 MON	27 TUE	28 WED	1 THU	2 FRI	3 SAT	Totals
Fun and Convenience											0
Green and Natural											0
Healthier School Child Nutrition Programs											0
Totals											0.00

Adding Projects to Your Timesheet

1. Navigate to the correct timesheet.
2. Click and select one or more projects to add.

   Narrow the list of projects by searching by the project name or filtering to current projects on which you are a team member, team leader, workflow action owner, or gatekeeper.
3. Click **OK**.

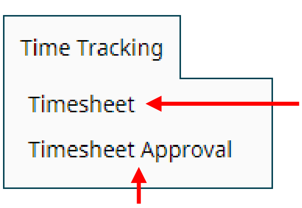
You can add the same project more than once to a single timesheet.

Submitting Timesheets for Approval

1. From the **Time Tracking** menu, select **Timesheet**.
2. Navigate to the timesheet you are ready to submit and ensure your time is entered correctly.
3. Click **Submit**.

The timesheet is now view only as it makes its way through the approval process. The status displays under the timesheet dates.

Approving and Rejecting Timesheets



A Project Manager's visibility and approval authority is restricted to only the projects to which they are assigned as the manager.

Timesheet Approvers can see time entered for all projects and approve the timesheets for users within their assigned resource pool regardless of project access.

Approving Timesheets

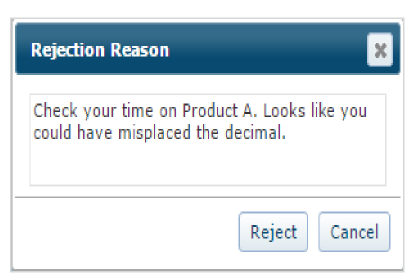
1. From the **Time Tracking** menu, select **Timesheet Approval.**
2. Select the check box next to the timesheets you want to approve and click **Approve or Reject**, or click the user's name in a timesheet row to view the timesheet details.
   Click **Approve** directly from the detail page.

   The timesheet may have additional hours for other Project Managers to approve; however, it no longer displays in your approvals list.

Rejecting Timesheets

1. From the **Time Tracking** menu, select **Timesheet Approval**.
2. Click the user's name in a timesheet row to view the details.
3. Click **Reject**, and enter an optional comment about why you are rejecting the timesheet.

If a timesheet is rejected when others have approved it, the entire timesheet must go through the approval process after the updated version has been submitted.



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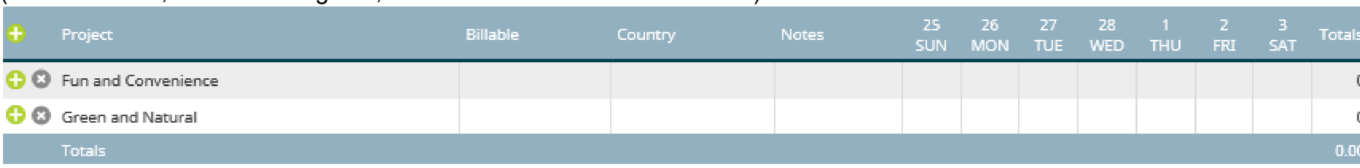
Setting Up Timesheets

(Administrators, Process Designers, and Resource Pool Administrators)



Project	Billable	Country	Notes	25 SUN	26 MON	27 TUE	28 WED	1 THU	2 FRI	3 SAT	Totals
Fun and Convenience											0
Green and Natural											0
Totals											0.00

Defining the Unit of Measure

As a company, define how to track time spent on projects and initiatives:

- By hours and partial hours. For example 8.5 to represent eight and half hours.
- By percentage of the day. For example, 50 to represent half a day.

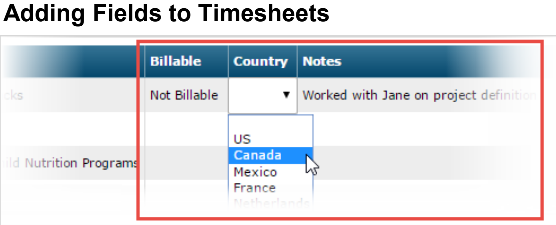
This is a standard you set and communicate to all those that track time using Accolade. There is not an Accolade parameter or setting that controls the unit of measure.

Restricting Projects Available to Time Tracking

Restrict timesheet entry at the class level, or at the project level for projects that do not require time tracking:

- **Class Level** - Process Designers and Administrators can define which classes allow timesheet entry for the projects created for models within that class using the **Include in Time Tracking** option in the class definition. Classes are set to be included in Time Tracking by default.
- **Project Level** - Process Managers and the assigned project manager can select whether a project is available for all timesheet users, only users on the team, or not available at all for timesheet entry. The option is available on the **Team** page of the project and is saved with the project team for use in other projects. Projects are set to be available to all timesheet users by default.

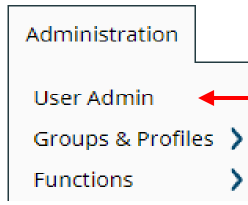
Adding Fields to Timesheets



1. From the **Process** menu, select **Configuration > Extended Fields**.
2. Expand the section that contains the field you want to expose in timesheets.

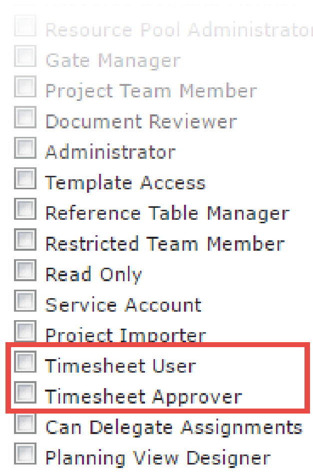
   Create additional fields, as necessary.
3. In the **Timesheet** column for the field, select **Active**.
4. Click **Apply** to save your changes.

Setting Up Timesheet Access



Assign users the appropriate user role through their Accolade user account.

Granting Users Access to Track Time



1. From the **Administration** menu, select **User Admin**.
2. Select the user to modify and click to display the user's details.
3. Select **Roles and Rights** and select **Timesheet User**.
4. Click **Save** to save your changes.

Assign this role to any user who needs to make an entry in a timesheet.

Granting Users Approval Access

1. From the **Administration** menu, select **User Admin**.
2. Select the user to modify and click to display the user's details.
3. Select **Roles and Rights** and select **Timesheet Approver**.
4. Click **Save** to save your changes.

Assign this role to any user who needs to approve timesheets for all users within a resource pool. Project Managers who have projects available to timesheets do not require the Timesheet Approver role to approve time for their projects.

Assigning Approvers to Resource Pools

For time tracking purposes, define resource pools based on who approves the timesheet for the users that belong to that pool.

1. From the **Resource** menu, select **Pools**.
2. Create a pool or click the pool name to modify an existing pool.
3. In the **Timesheet Approver** field, select the user who has approval access to all the timesheets submitted within the pool.

   Only users assigned the Timesheet Approver role are available for selection.
4. Click **Apply** to save your changes.

If you choose to not assign an approver to a resource pool, timesheets submitted by users within that pool are not sent through the timesheet approval process.

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