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Sage Tracks

Company Administrator Guide

October 2017

Contents

Getting started

Learn about Sage Tracks and the basics for using the time and attendance program.

About Sage Tracks

Sage Tracks is an end-to-end workforce management solution for small businesses. The web-based time and attendance program provides your company with:

- Simple, accurate time tracking with GPS location stamping
- Employee self-service with time off requests and scheduling
- Employee dashboards to help them better manage their time
- Manager dashboards and reports to help them manage their employees
- Pay- period-specific timesheet exports for payroll processing

Sage Tracks offers security and access profiles for total control over what your company administrators, managers (and supervisors), and employees can see and do within the program. After set up and configuration, employees can use Sage Tracks to record time worked, submit timesheets, and request time off; managers can access employee information and respond quickly to requests without the hassle of paperwork.

Using Sage Tracks

Learn everything you need to know to use Sage Tracks, including signing in, entering time on your timesheet, and requesting time off.

Using Sage Tracks

Security profiles are used to define different types of users and how they can use the program. Although security profiles can be customized, the standard security is set for three types of users.

Company Administrators

The company administrator is typically the human resources or payroll administrator at your company. Administrators use the program to:

- Add and remove employees and change employee information
- Manage and assign IP address restriction profiles within your company
- Designate department managers and the groups of employees who report to them
- Set up and maintain holiday calendars
- Set up and maintain pay rate tables
- Define and maintain labor allocations (such as for departments and locations)
- Set up and maintain security profiles for employees and managers

> **Note:** In addition to these administrative tasks, company administrators have access to the same features as department managers.

Department Managers

Department managers (and supervisors, as defined for your company) typically use the program to manage the time and attendance information for employees assigned to them. Managers use the program to:

- Manage timesheets
- Manage schedules
- Manage time off requests
- Access anniversary, birthday, and time off calendars
- Access reports for time entry, dot boards, punch maps, and timesheets

- View time off accrual balances
- View (and sometimes edit) basic information for the employees who report to them

Employees

Employees are assigned with limited access to:

- View and update personal information, such as addresses and phone numbers
- Set personal information, such as their default page when signing in, and enable multi-factor authentication
- View their own work schedules
- Enter their time and complete timesheets
- Select labor allocations associated with their time entries (such as locations and departments)
- View their own time off accrual balances
- Request time off

Common icons and page functions

Throughout Sage Tracks, you will find standard icons to perform specific functionality. Hover your mouse over the icon to learn what it can do.

Icon	Function
🗑	Delete the record.
✏	View or edit the record.
☑	Approve (Time Off requests or timesheets)
⊗	Reject (Time Off requests or timesheet)
⚙	Calculate accruals (Time Off)
⚙	Cannot calculate accruals (Time Off)
🕐	View or edit the timesheet
🔍	View history (Time Off Accruals), or

Icon	Function
	The placeholder employee image.

Signing In

To start using Sage Tracks, you must sign in with your credentials.

Signing in from your computer

To sign in to Sage Tracks, go to the website provided by your System or Company Administrator. Enter your username and password and click **Sign In**.

> **Note:** If you don't have the URL to your Sage Tracks website, contact Customer Support at 866-306-5106 option 2.

Signing in from your mobile device

Sage Tracks can be used with any mobile device. You don't need a special IOS or Android app to use the program. Simply open your favorite Internet browser on your mobile phone or tablet, go to the Sage Tracks website provided by your System or Company Administrator, and sign in. After you sign in, use the menus and options, which are represented by icons at the top of the page. When on your dashboard, swipe up to view all panels available to you.
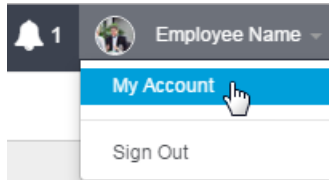
> **Tip:** If your company uses GPS geofencing or picture taking for time entry, you must allow access to your location and camera, and you must be at your job site when you clock in or out.
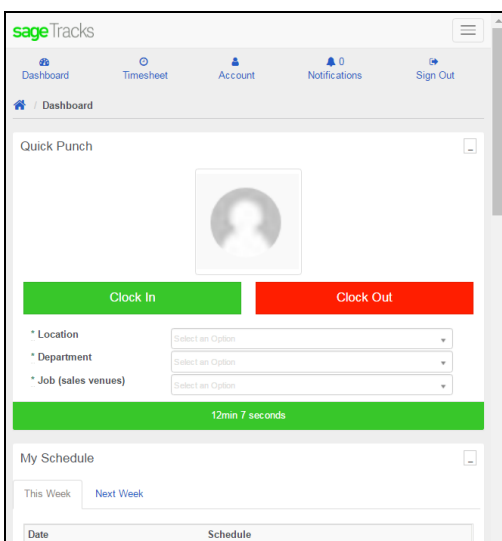
Changing your password

To change your password when you're signed in:

1. At the upper-right side of the page, click the drop-down arrow next to your name and select **My Account**.
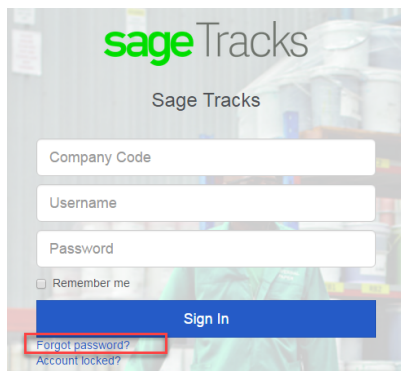
2. In the **User Settings** panel, enter and confirm your new password. Passwords must be at least 8 characters and include a capital letter, a lowercase letter, and at least one numbers.

3. Click **Save**.

To change your password without signing in:

Important! You must have your email address entered in your profile (My Account) in order to reset your password using this method.

1. Go to the Sage Tracks sign on page.

2. Below the Sign In button, click the **Forgot password?** link.

3. On the Forgot Your Password page, enter the **Company Code** for your company. If you don't know your company code, contact your Company Administrator.

4. Enter your **Email** address.

5. Click **Send Reset Instructions**. The system sends you an email message.

6. Check your email and open the automated email message from Sage Tracks.

7. Click the **Reset Password** link in the email. The Change Your Password page opens in your default Internet browser.

8. Enter and confirm your new password. Passwords must be at least 8 characters and include a capital letter, a lowercase letter, and a number.

9. Click the **Change My Password** button.

Using your dashboard

You can use Sage Tracks to manage your own timesheets, which includes clocking in and out, requesting time off, and viewing your time off accrual balances (if set up for your company).
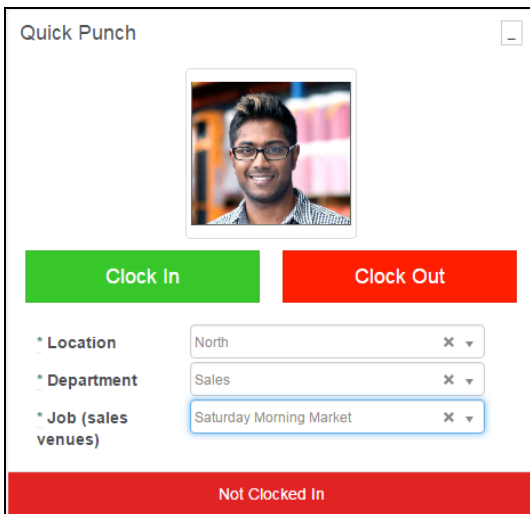
When you sign in to Sage Tracks, your personal dashboard opens.

Your dashboard provides quick access to the information you need the most. Dashboards are designed to match your security permissions and the information that displays on your dashboard depends on how your company is configured. As a department manager or company administrator, your dashboard includes two tabs, **My Employees** and **Self Service**.

Quick punch

Depending on the type of timesheet profile assigned to your account, you may have the quick punch feature on your dashboard.

Use this feature to quickly clock in and out. If labor allocations (such as for location or department) are set up for your company, you can select the allocations when you clock in. If picture taking is set up for your company, you may be required to allow your Internet browser to access your camera to take a photo when you clock in or out. As a manager or company administrator, the quick punch feature is in the Self Service tab of your dashboard.

My Employees

Your quick view of information for all of your employees (who report to you).

- **My Employees**. A condensed list of your employees and the status of their timesheets.

- **Time Off**. A summary of the employees who are off work (with an approved time off request).

- **Time Off Requests**. All time off requests pending approval.

- **Dot Board**. Your employees who are clocked in at any given time.

- **Missing Punch**. Employees who are missing a time entry (clock in or out) on a timesheet.

Self Service

The Self Service tab on your dashboard enables you to manage your own time entries, time off requests, and information.

- **Quick Punch**. As a manager, the quick punch feature displays on your Self Service tab. Use quick punch to quickly clock in and out.

- **My Schedule**. Your own schedule for the pay period. Click the **Next Week** tab to view the next pay period schedule.

- **Time Off Requests**. Use this panel to request time off for yourself. You can click **View Balances** to view the hours you have accrued as well as your balances for each time off type.

- **My Time Off Requests**. Your time off requests (including those approved and rejected) for the past, present, and future.

- **Notes**. A feature for you to take notes for your own purposes. This information is not shared with others at your company, but may be visible to your Sage System Administrator.

Using your timesheet

You use your timesheet to enter the time you work for time-tracking purposes. Within your timesheet, you can clock in and out using different labor allocations, as needed. The method you use depends on whether you have a Timestamp or Bulk Hours type of timesheet.

Entering your time on a Timestamp timesheet

1. Select **My Timesheets**. The timesheet opens to the current day.

2. If your company uses labor allocations, such as for locations and departments, select the labor allocations for your time in those columns of the timesheet.

3. Click the **Clock In** button to punch in. The current time is automatically recorded in the **Start Time** column. If you clock in a second time before clocking out, the system automatically adds an end time.

4. When you're done, click the **Clock Out** button to punch out. The current time is automatically recorded in the **End Time** column. Each time you clock out, a new line is added in case you need to punch in again.

> **Note:** Depending on your security settings, you may be able to enter your start and end time directly into the timesheet columns. If you do this, you must click **Save** to save your changes to the timesheet.

5. At the end of the pay period, click the **Submit** button to send your timesheet for approval.

   After your timesheet is submitted, any changes must be made by your manager.

Entering your time in a Bulk Hours timesheet

1. Select **My Timesheets**. The timesheet opens to the current pay period.

2. If your company uses labor allocations, such as for locations and departments, select the labor allocations for your time in those columns of the timesheet.

3. Enter the hours you worked in each day column, aligned with the labor allocation selected for that row.

4. If you take time off in the pay period:

   a. Use a new row.

   b. In the **Time Off** column, select the type of time off.

   c. Enter the total **Hours** you took off in the column for the appropriate date.

5. At the end of the pay period, click the **Submit** button to send your timesheet for approval.

   After your timesheet is submitted, any changes must be made by your manager.

Entering extra pay

If you use the Extra Pay feature (set up on the timesheet by your system administrator), you can enter dollar amounts on your timesheet.

1. Select **My Timesheets**. The timesheet opens to the current pay period.

2. Click the Extra Pay tab of the timesheet.

3. Select the **Date** for which you want to enter a dollar amount.

4. If your company has set up associated pay categories, select the **Pay Category** to which this amount should be reported.

5. If applicable, select the time off type and labor allocations (such as location and department).

6. Enter the **Amount** in numbers up to 2 decimal places.

7. Click **Save**.

8. To enter dollar amounts for additional dates in this pay period, click **Add Row** and repeat steps 3 to 6.

Requesting time off

If your company uses Sage Tracks for time off tracking, you can use the program to request time off and check your accrued time off balances.

To view your accrued time off balance

1. From the top navigation bar, click your name and select **My Account**.
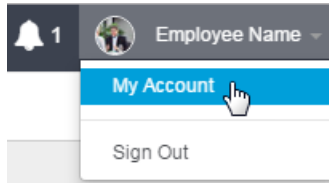
2. Scroll down to the **Accruals** panel and review your time off accruals. The information includes:

   - **Time Off**. The type of time off.

   - **Accrued To Date**. The date to which the balance is accrued.

   - **Accrued Hours**. The hours you have accrued in the current accrual period. Note that your time off may be set up to accrue in days, but this table always shows the balance in hours.

   - **Taken**. Time off taken in hours for the current accrual period.

   - **Balance**. The current available balance in hours. Note that this does not take into account requests that are pending approval.

   - **Scheduled**. Future time off that was requested and approved (in hours).

   - **Pending Approval**. Any time off requests that are not yet approved.

> **Tip:** You can also view your accrued balances from your dashboard ( ). In the **Time Off Requests** panel, click the **View Balances** button.

To request time off

1. Select **Dashboard** from the top menu and select the **Self Service** tab.

2. In the **Time Off Requests** panel, complete the following:

   - **Request Type**. Select either Full Day, Partial Day, or Multiple Days.

   - **Time Off Type**. Select the type of time off, such as Vacation, Personal, Sick, or Unpaid Leave. The options depend on what your company offers.

   - **Date**. (If Full Day or Partial Day is selected.) Enter the date you want to request.

   - **Start and End Dates**. (If Multiple Days is selected.) Enter the range of dates you want to request.

   - **Start and End Times**. (If Partial Day is selected.) Enter the time span you want to request.

   - **Total Time**.(If Multiple Days or Partial Day is selected.) Enter the time in hours for each day you want to request.

> **Note:** If you are requesting multiple days off, the **Total Time** is the number of hours for *each day*, and not the duration of your time off. If the time per day varies, you must request the days off one at a time (using the Full Day or Partial Day request type).

3. Click **Request**. Your manager can now review and approve your request.

Maintaining your account

After you sign in, you can change some of your profile information.

Viewing and updating your information

Depending on your security permissions, you can view and update your personal profile.

1. At the upper-right side of the page, click the drop-down arrow next to your name and select **My Account**.
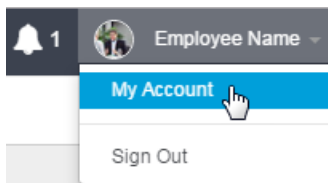
2. Review your general profile information and update your information as needed.

3. Click the **Options** tab to view and update your Time Zone, Language, Default Screen, and to enable multi-factor authentication.

4. Click **Save**.

Managing your notifications

When you're signed in to Sage Tracks, you may receive system notifications or messages from the company administrators (or managers) at your company.

Notifications appear in the bell icon within the top navigation bar, the grey bar at the top of the program.

Viewing your notifications

To view your notifications:

1. In the top navigation bar, click (bell icon). The notifications preview window opens.

2. At the bottom of the preview window, click **View All Notifications**.
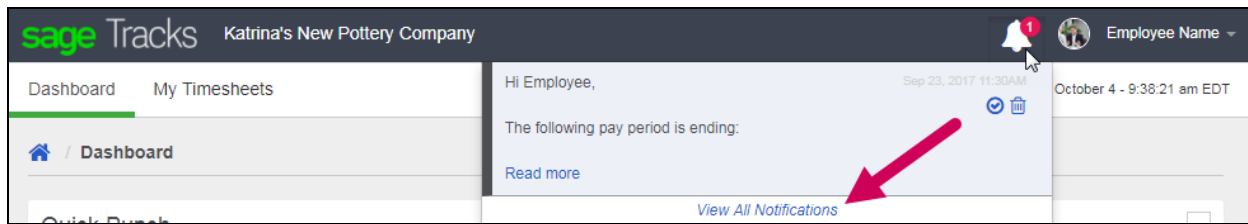
3. The Notifications page opens with your current notifications. Here you can:

- **Mark the notification as read**. Click 🔵 (check mark icon) on the right side of the notification to mark it as read. The notification is saved to your notifications page, but the alert is removed from the bell icon in your toolbar.

- **Delete the notification**. Click 🗑 (delete icon) to permanently delete the notification from your page.

Company setup

Learn all the steps you need to take to set up your company in Sage Tracks.

Setting up your company

When you enroll in Sage Tracks services, your company administrator works with an implementation specialist to configure the features applicable to your company's time and attendance needs. In most cases, the setup and configuration is completed for you with regular consultations. For profiles and rules that require new settings as part of on-going maintenance, your company administrator may be provided with training and access to manage your company's settings.

Company configuration includes defining information in three areas: employee information, company information, and time information.

Setting up employee information

This information includes:

- Defining employee settings, such as employee types (contractor or 1099, employees), pay types (hourly, salary), and employee statuses (active, terminated, leave of absence). Note that if you integrate with Sage Payroll Services, this information transfers with the employee sync.

- Setting up employee groups by manager or supervisor and defining what managers can edit for the employees who report to them.

- Assigning security profiles as they pertain to your company (for employees, supervisors, department managers, and company administrators).

- Setting up pay rate tables to define role-based and employee-specific pay rates. If you manage pay rates in your payroll program, you may not want to set up the pay rate tables feature in Sage Tracks.

- Adding employees, which is done during the implementation process or through the employee sync process with Sage Payroll Services.

Setting up company information

This information includes:

- Defining IP address restriction profiles to limit which IP addresses your employees can use when entering time.

- Defining holiday calendars specific to the holidays your company observes.

- Setting up and defining labor allocations, such as locations, departments, divisions, and jobs.

- Assigning pay period profiles to determine when the pay period starts and ends.

- Setting up pay calculation profiles, to determine default pay settings, including:

    - Automatic deduction of time for lunch or breaks, as needed

    - Rounding of time entries (such as, to the nearest minute or hour)

    - When time entered should be considered overtime

    - When time entered should be considered holiday pay

- Assigning pay prep profiles to determine how time entries are calculated and then exported for use in payroll.

Setting up time and timesheet information

This information includes:

- Setting up time off accrual rates and rules, such as annual carry-over amounts and amounts accrued per pay period.

- Defining timesheet prefill profiles to automatically prefill employee timesheets with holidays.

- Defining timesheet profiles to determine how your employees should enter time.

Setting up profiles and policies

Some of your company setup involves using profiles and policies to manage your company's time and attendance.

About holiday calendars

You can use holiday calendars to define when your company observes holidays. You can create multiple holiday calendars to schedule different holidays for different types of employees (no paid holidays for contractors, for example), but only one holiday calendar can be assigned to each employee.

Holiday calendars can include both paid and unpaid holidays, can be associated with a type of time off, and are used primarily for scheduling purposes.

About the holiday calendars list page

To open the holiday calendars list page, select **Company Settings > Profiles/Policies > Holiday Calendars**.

You can use this page to:

- View the holiday calendars set up for your company.

- Edit existing holiday calendars.

- Delete existing holiday calendars.
- [Create a new holiday calendar](#).

Setting up holiday calendars

You can use the Holiday Calendar feature to define when your company observes holidays.

Creating a new holiday calendar

To create a new holiday calendar:

1. Select **Company Settings > Profiles Policies > Holiday Calendars**. The Holiday Calendars list page opens.

2. Click the **Add Holiday Calendar** button. The new holiday calendar page opens.

3. In the Settings panel of the new holiday calendar page, enter **the following information:**

   - **Name**. This name is visible on the employee record when you select the Holiday Calendar profile.

   - **Description**. Enter a brief description for reference purposes.

4. Click the **Add Holiday** button. A holiday row appears in the right Holiday List panel on the right.

5. To define the holiday, enter information in **the following fields:**

   - **Name**. Enter a name for the holiday.

   - **Time Off**. Select the related type of time off for this holiday. The rules set up for the selected time off profile will apply (such as if the holiday is unpaid, paid, or paid at a different rate).

   - **Hours**. Enter the standard hours for this holiday. This information is necessary if the holiday is paid or considered in your employees' standard work hours.

   - **[Previous Year]**. (Optional) For information purposes, select the date the holiday was observed last year.

   - **[Current Year]**. For current holidays in employee schedules, select the date the holiday is observed this year.

   - **[Next Year]**. For next year and future schedules, select the date the holiday will be observed next year.

   - **Reset** (Not Applicable). You can ignore this field when adding a new holiday. It pertains only to reset edits for an existing holiday calendar. It resets any changes back to the rules configured in the next step.

6. Click ✏ (Edit) next to the holiday row to define how or if the holiday will prefill employee schedules. Choose from

the following setting options:

- **Not Used**. Select this option if you don't want the holiday dates to prefill in your employee schedules.

- **On Specific Date**. Select this option to prefill the holiday on a specific date, and you can define the rules if the holiday should move to another day, such as a weekday, if it falls on a Saturday or Sunday.

- **On Specific Day of Week**. Select this option to prefill the holiday on a specific day of a week and a month. You can define if the holiday should be observed on the first, second, third, fourth, or last Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday of any month.

- **Use Predefined Holiday**. Select this option to prefill the holiday with an existing standard holiday, such as New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, or Christmas Day. Enter the number of days in addition to the standard holiday to prefill. For example, if your company observes Thanksgiving on Thursday and Friday, select the predefined holiday of Thanksgiving Day and enter **1** in the **+ Day** field.

7. Repeat steps 4 through 6 until you have all holidays defined for the calendar year.

8. Click **Save**.

Updating a holiday calendar

You may need to update existing holiday calendars, such as if your company decides to observe a holiday on Friday instead of Monday. To update an existing holiday calendar:

1. Select **Company Settings > Profiles Policies > Holiday Calendars**. The **Holiday Calendars** list page opens.

2. Click ✏️ (Edit) next to the calendar you want to update.

3. Make the changes.

4. Click ✏️ (Edit) next to the holiday row to change how or if the holiday will prefill employee schedules. You can update **the following setting options:**

- **Not Used**. Select this option if you don't want the holiday dates to prefill in your employee schedules.

- **On Specific Date**. Select this option to prefill the holiday on a specific date, and you can define the rules if the holiday should move to another day, such as a weekday, if it falls on a Saturday or Sunday.

- **On Specific Day of Week**. Select this option to prefill the holiday on a specific day of a week and a month. You can define if the holiday should be observed on the first, second, third, fourth, or last Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday of any month.

- **Use Predefined Holiday**. Select this option to prefill the holiday with an existing standard holiday, such as New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, or Christmas Day. Enter the number of days in addition to the standard holiday to

prefill. For example, if your company observes Thanksgiving on Thursday and Friday, select the predefined holiday of Thanksgiving Day and enter **1** in the **+ Day** field.

5. If you change (or previously edited) dates for an existing holiday date but want to reset your changes back to the rules, select the **Reset** check box. This resets any changes back to the rules configured in the previous step.

6. Click **Save**.

About IP restriction profiles

You can set up and define specific IP Addresses from which your employees must punch in and out.

Before you can use IP restriction profiles, a public IP address must be set up at each location where your employees clock in and out. Sage Tracks cannot recognize local IP addresses, such as those set up with 192.168. and 10. prefixes. If your IP address starts with either of these number series, these are local IP addresses and will not work with Sage Tracks.

> **Tip:** Consult with your IT staff or visit http://www.whatismyip.com at each location where your employees will clock in and out to determine if your IP address is local, and for tips to set up a public IP address.

About the IP restriction profiles list page

To open the IP restriction profiles list page, select **Company Settings > Profiles/Policies > IP Restriction Profiles**.

You can use this page to:

- View the IP restriction profiles set up for your company.
- Edit existing IP restriction profiles.
- Delete existing IP restriction profiles.
- Create a new IP restriction profile.

Setting up IP restriction profiles

You can use IP restriction profiles to set up and define specific IP Addresses from which your employees must punch in and out.

> **Tip:** Consult with your IT staff or visit http://www.whatismyip.com at each location where your employees will clock in and out to determine if your IP address is local, and for tips to set up a public IP address.

To set up an IP restriction profile:

1. Select **Company Settings > Profiles/Policies > IP Restriction Profile**.

2. Click the **Add Access Profile** button. The new IP address **Settings** page opens.

3. Enter a **Name** for the IP address restriction profile. This name is visible on the employee profile.

4. Click the **Add IP Address** button. A line appears in the IP Address List panel.

5. Enter the complete numeric IP address and a short description.

6. Click **Save**.

About rate profiles

Rate profiles are used to define pay rates for jobs, roles, and individual employees. Pay rates can be managed in Sage Tracks and then included in the timesheet export file for use in payroll. If rates are also set up in payroll, when the timesheet is imported to your payroll, the information in the timesheet overwrites the pay rates set up in payroll.

If managers (or supervisors) should not see their employees' pay rates, we recommend you do not enter or set up pay rates in Sage Tracks.

> **Important!** If you integrate Sage Tracks with a Sage payroll program or service, the pay rates are not synced or transferred with the integration. Best practice is to choose one system, either Sage Tracks or Payroll, to manage employee pay rates.

About the rate profile list page

To open your rate profiles list page, select **Company Settings > Global Setup > Rate Profiles**.

You can use this page to:

- View the rate profiles set up for your company.
- Edit rate profile rate tables.

About rate profile tables

Rate profiles are used to define pay rates for jobs, roles, and individual employees. Rate tables are the actual rates within the profile.

> **Important!** If you integrate Sage Tracks with a Sage payroll program or service, the pay rates are not synced or transferred with the integration. Best practice is to choose one system, either Sage Tracks or Payroll, to manage employee pay rates.

If rate profiles are set up for your company, you can view a list of the rate tables by name

About the rate table list page

To open the rate table list page for a rate profile, select **Company Settings > Profiles/Policies> Rate Profiles**. Then, click ✎ (the edit icon) next to a rate profile to open the list of rate tables set up for the selected rate profile.

You can use this page to:

- View the rate tables set up for the selected profile.
- Edit existing rate tables for the selected profile.
- Add a new rate table to the selected profile.

Setting up and maintaining pay rate tables

Rate tables are used to manage rates specific to a job, role, or employee. They are a detail within each rate profile. Once the table is added, you can add and manage pay rates for that table.

To add a new rate table:

1. Go to **Company Settings > Profiles/Policies > Rate Profiles**. The **Rate Profiles** list page opens.

2. Click ✎ (the edit icon) next to the rate profile for which you want to add a rate table. The **Rate Tables** list page opens.

3. Click the **Add Rate Table** button. The new rate table page opens.

   > **Tip:** Refer to the breadcrumbs on the page when adding a rate table to help remember which rate profile you are modifying.

4. Enter a **Name** for the rate table. This name is only visible within the rate profile details for company administrators (and possibly managers).

5. Optionally, enter a **Description** for this rate table.

6. Click **Save**.

Adding a new pay rate to a rate table

After you add a rate table, you can add and define the pay rates for that table.

1. From the **Rate Tables** list page, click ✎ (the edit icon) next to a rate. The rate table page opens.

2. Click the **Add Rate Entry** button. The **New Rate Entry** window opens.

3. Enter information for all applicable fields.

- **Rate**. The dollar amount per unit that this role/job will be paid.

- **Unit**. Select Hour to pay the employee the rate per hour.

- **Effective From/To Dates**. The effective date for the rate. If multiple rates are added (using the **Add Rate Schedule** button), the system assumes a hierarchy by effective date.

- **Settings** > **Time off option**. Conditions for rates and when they apply. Select one of the following:

  - **IS SET** to make the rate conditional to any time off.

  - **IS** and select a **Time Off** type to make the rate conditional to that time off.

  - **IS NOT SET** to make the rate for everything other than a time off entry in the timesheet.

- **Labor Allocation**. Select the labor allocations to make this rate conditional only for these labor levels and allocations.

  - **Include Subtree**. Select these check boxes if your employees may allocate their time to labor allocations with multiple levels. Learn more about labor levels

4. Click **Save**. The rate entry window closes and you can view the rates set up for this table.

Setting up global setup

Some of your company setup involves global setup to manage your company's time and attendance.

About labor levels

Labor levels are used to manage labor allocations.

Labor allocations are used to represent locations, divisions, departments, cost centers, jobs, and any type of custom labor level your company needs. Labor levels can be considered as a category, and allocations are the options to select within that category. Once defined, your employees will see the label levels as you set them up and they select the appropriate allocation when entering their time.

For example, you can set up a labor level (category) for **Location**, and then define labor allocations (options) for North, South, East, and West. Then, when your employees clock in or enter time on their timesheets, they can select from the list of locations as shown in this example:
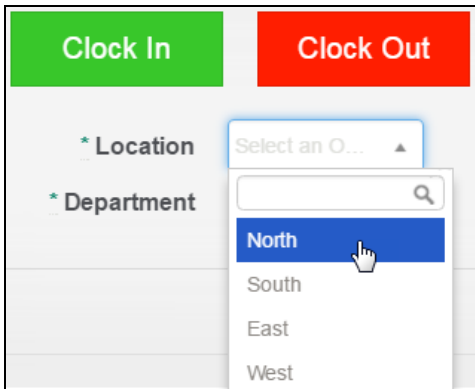
> **Caution!** If you're using Sage Payroll Services, the labor allocations must match the settings in your payroll program in order for the timesheet export to work in your payroll.

About the labor levels list page

To open the labor levels list page, select **Company Settings > Global Setup > Labor Levels**.

You can use this page to:

- View the labor levels (categories) set up for your company.
- Edit existing labor levels.
- Add new labor levels.

Setting up labor levels and allocations

Labor levels are used to manage labor allocations, which are then used to represent locations, divisions, departments, cost centers, jobs, and any type of custom labor level your company needs.

To create a labor level:

1. Go to **Company Settings > Global Setup > Labor Levels**. The **Labor Levels** list page opens.

2. Click the **+ Add Labor Level** button. The **Labor Level Items** page opens.

3. Enter a **Name** for the labor level. This name shows up as a labor category for your employees to select from when they enter time.

4. Optionally, if your company has the geofencing feature set up (to limit where your employees can clock in or out using GPS boundaries) click and select a color for **GPS radius color** to assign to this labor level. Later, you will see this color when your employees are clocked in on the Punch Map report.

5. Click **Save**. The page refreshes and now you can start building the allocations under this labor category. You can skip to step 3 in the next section.

> **Note:** Sage Tracks supports up to 20 different labor levels (categories) for each company.

To create labor allocation options under a labor level

After you create a labor level, you can add labor allocations as options to select within that level.

1. Go to **Company Settings > Global Setup > Labor Levels**. The **Labor Levels** list page opens.

2. Click the edit icon ( ) next to the labor level (category) for which you want to add allocations (options).

3. Click the **Add Labor Allocation** button to open the Labor Level Items panel.

4. Enter

   - **Parent**. Leave this field blank when adding a new labor allocation, unless you need multiple tiers of labor allocations.

   - **Name** and **Abbreviation**. Enter a name for the labor allocation. This is what your employees will see as an option to select under the labor level name.

   - **External ID**. Enter an ID to map the allocation to time-tracking hardware. We recommend you use a numeric value here if you use a physical clock to swipe in and out.

   - **Payroll Code**. Enter a code to map the allocation to earning codes in your payroll program.

   - **Billing Code**. Enter a code if you use an accounting or invoicing program to bill your clients for your employees' time worked.

   - **Address**. Enter the address if you use Geofencing and GPS tracking for your employees' time entry. Otherwise, this is optional.

5. Click **Save**.

About notifications

Notifications are messages to your employees delivered through email and as in-application notifications. Templates help you get started, and you can customize how the notifications are delivered, the recipients, and the contents of the message.

A template is available for each event that can trigger a notification, including activity for time off requests and timesheets.

About the notifications list page

To open your notifications list page, select **Company Settings > Global Setup > Notifications**.

You can use this page to:

- View the notifications that are set up for your company. The information includes the Category, Action (trigger), Criteria, and Type of notification.
- Edit existing notifications.
- Delete existing notifications.
- Create a new notification.

Using the notifications template library

You can use the Notifications page on the Company Settings menu to create notifications for employees and managers.

A template is available in the Template Library for each event that can trigger a notification, including:

- A timesheet is submitted, rejected, or approved
- A timesheet is changed by a manager
- A pay period is ending
- An employee requests time off
- A time off request is approved or rejected
- A time off request is canceled by the employee

Opening the template library

Available templates are listed in the library with descriptions for each type. To set up a notification, select a template from the library and then customize it as needed.

To open the template library:

1. Select **Company Settings > Notifications**. The Notifications page opens.
2. Click **Add Notification**. The Template Library window opens.
3. Review the list of available templates to determine which one you want to set up.

**Next Steps:** Setting up notifications

Setting up notifications

To set up a notification, select a template and then customize it as needed. Learn more about notifications.

To set up a notification:

1. Select **Company Settings > Notifications**. The Notifications page opens.
2. Click **Add Notification**. The Template Library window opens.

3. Find the template that you want to use, and then click the corresponding **Select** button.

    You can search for a template by typing in the Template or Description field. The list is filtered as you type.
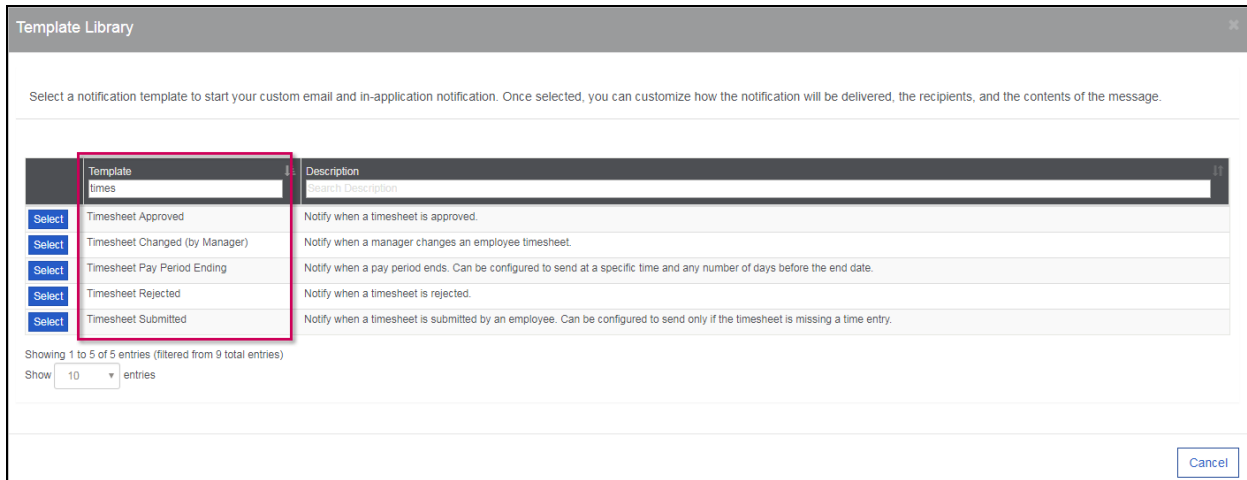
    When you click **Select**, the new notification window opens.

4. In the **Settings** area,

    - **Notification Name**. Enter a name to describe the notification. The name will appear in the Notifications list but not in the notification.

    - **Send email notifications**. Select this check box to deliver the notification by email.

    - **Send in-application notifications**. Select this check box to deliver the notification within employees' Sage Tracks mobile application.

    - **Customize in-application notification message**. Select this check box if you are delivering the notification both by email and within the application and if you want to enter a different message for the in-application notice. Otherwise, both types of notifications have the same message text.

5. In the **Recipients** area, specify **who will receive the notification**:

    - **Employee**. Select this check box to send the notification to employees.

    - **Approver(s)**. Select this check box to send the notification to managers who are set up as approvers. The managers will receive notifications for the employees assigned to their groups.

      > **Tip:** Select the **Approver(s)** check box to set up one notification that works for all employees regardless of their group affiliation.

    - **Specific User**. Select a user to send the notification to that person.

- **Specific Group**. Select a group to send the notification to the managers within that group.

- **Specific Email**. Enter an email address to send the notification to that address.

6. In the **Criteria** area, your options are different depending on the nature of the notification. For example, in a Timesheet notification, you can

    - **Send only if missing punch**. Select this check box if the notification should be sent only if a timesheet is missing a punch-in or punch-out event.

    - **In-App Color**. Click in this field to open the color picker and select a color to use for the in-application notification. Alternately you can type the hexadecimal value for a color.

7. In the **Message** area, you can change the default subject and message and use the formatting toolbar to modify the text style.

    If you selected the **Customize in-application notification message** check box, the **Email Message** and **In-Application Notification Message** sections are both available.

8. Use the tags in the **Message Tags** area to add additional fields to the notification message. For example, if you are creating a notification that will be sent when a timesheet is submitted, you can add the total number of hours for the timesheet by clicking the **ts_total_time tag** and dragging it into the message field.
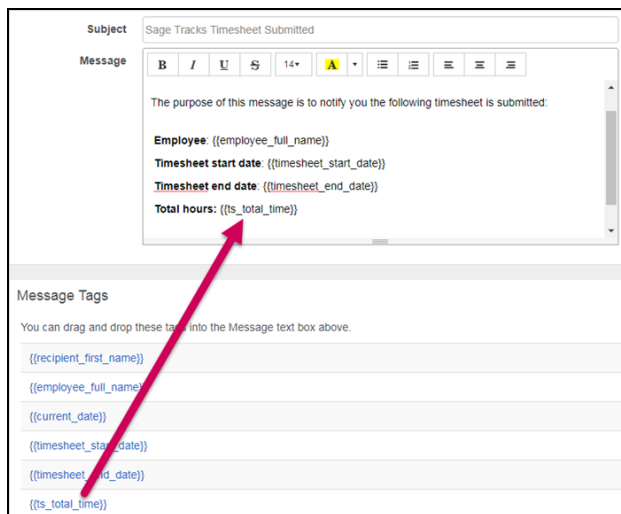
    To copy or move text or a tag, highlight it and use standard keyboard shortcuts to cut, copy, and paste. Alternately, right-click the text or tag and select the Cut, Copy, or Paste option from the menu.

9. Click **Save**.

The notification is added to your Notifications list, and notifications are automatically sent based on the selected criteria.

Employees

Learn everything you need to know about managing employee information in Sage Tracks.

Viewing the employee list

You can use the employee list page to view all employees at your company. Managers (and supervisors) can view only those employees who report to them.

To view the employee list, select **My Employees > Employees > Employee List**.

The page includes the following information:

- Links to the employee record and the employee timesheet
- Employee name and ID
- The employee's Sage Tracks username
- The employee's badge ID
- Employee status
- Security profile
- Pay calculation (such as, hourly or salary)
- Timesheet profile (type)
- Email address
- Full address
- Default labor allocations

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

See also: Setting up saved and email reports

Adding employees

Depending on your security permissions, you can add new employees to Sage Tracks.

If you use Sage Payroll Services and employees are set to use Sage Tracks, your employees are automatically added to and demographic information is updated in Sage Tracks through the employee sync.

> **Tip:** If managers need to add employees, you can contact your System Administrator and request changes to the security permissions for managers at your company.

To add a new employee

To add an employee directly in Sage Tracks:

1. Go to **My Employees > Employee Maintenance > Add Employee**. A blank Employee Information page opens.
2. Complete all required fields on the page before saving the employee.

   - **First and Last Name**. Enter as much of the employee information as you can before saving the page so you can find the employee again.

   - **Employee ID**. Limited to numbers and letters and not case sensitive. If you integrate with a payroll program, enter the same employee ID you use in payroll.

   - **Email Address**. While this field is not required, employees must have a valid email address assigned in order to reset their passwords, use the Forgot Password feature on the sign in page, and unlock their accounts to reset the password after entering an invalid password 3 times.

   - **Username**. This is the username the employee will enter when he or she signs in to Sage Tracks. Typically, the username is the employee's first initial and last name. It can be the employee's email address.

   - **Password**. Enter and confirm the password your employee will use to sign in. You must use at least one letter and one number. The employee can change the password under the My Account menu after signing in.

   - **Employee Status**. Select from the list of predefined employee statuses set up for your company.

   - **Security Profile**. Select from the list of predefined security roles set up for your company. This determines what information the employee can view or update. Typically the options are Employee, Department Manager, or Company Administrator. Learn more about security profiles

   - **Timesheet Profile**. Select from the list of predefined timesheet profiles set up for your company. While this field is not required to save the employee, you must select a timesheet profile for the employee to enter time.

   - **Access Profile**. Select only if you want to restrict the IP addresses your employees can use when entering time. Learn more about setting up IP restriction profiles

- **Pay Prep Profile**. Used to determine how time entries are calculated and then exported for use in payroll.

  Typical options here are **No Export To Payroll** for employees whose time entries should not be included in the time export file, such as for tracking non-employee hours who are paid through a temporary employment service, and **Pay Prep Profile** for all other employees.

- **Dates**. While the **Date Hired**, **Date Started**, and **Birth Date** are not required to save the employee record, this information is necessary for certain functionality to work properly (such as for Accruals).

> **Note:** During the set up process for your company, your implementation specialist may predefine the default profiles for new employees. Review the **Profiles** panel and use the drop-down menus to select different profiles if needed.

3. Click the **Options** tab to enter the **Standard Work Day** (in hours) and select the employee's **Time Zone**.

4. Optionally, click the employee image graphic at the top of the Employee Information page to add a photograph or image to represent the employee. Your employees can update the images for themselves under **My Account** menu after they sign in.

5. Click **Save**.

More about employee settings

Depending on your setup, you may have additional settings on the employee record. Setting options include:

Scheduling

Select between the available **Schedule Types**. See "Setting up employee schedules" (page 51) to learn more about **Personal Schedules**.

Default Labor Allocation

If you are using the Labor Allocations feature, this panel shows the custom labor levels set up for your company. If you select default labor allocations here, each time the employee enters time, the allocations are assigned to the time entry and will be included in your timesheet export file.

The employees may have the option to change the allocations when completing their timesheets. This is defined in the timesheet profile settings by your System Administrator.

Holiday Calendar

Used to add the holidays your company observes to the employee's schedule. Your holiday calendar profiles may be set up for you, or you can define the holidays yourself.

Rates

If you set up Pay Rate Tables in Sage Tracks instead of in your payroll program, the **Rates** panel shows the rate levels set up for your company. If needed, you can specify personal rates for each employee here.

Accruals

If you set up Time Off Accruals, the Accruals panel displays with the time off accrual types set up for your company.

Maintaining employees

Depending on how your company is configured, employees can update some of their own information, such as email, address, phone numbers, and password.

Department managers can update employee information for employees who report to them. Company administrators can update all employees' information if needed.

Changing employee information

To change an employee's information:

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. Edit the employee's information as needed.

4. Click **Save**.

Changing employee passwords

To change an employee's password:

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. Enter the new password and confirm it.

4. Click **Save**.

To deactivate an employee account

You may need to deactivate an employee account or prevent an employee from signing in to Sage Tracks. You can deactivate or terminate the employee using one of two methods.

Method 1: Update the employee status on the Employee Information page

Use this method to temporarily change the employee status and retain the employee's future time off and timesheet information.

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. On the **Employee Information** tab, scroll to the **Pay Information** panel on the right.

4. For **Employee Status**, select **Inactive** or **Terminated** (as appropriate) for this employee.

   > **Note:** If you use time off accruals, you can continue to accrue time off manually on the employee record.

5. Optionally, enter a date in **Date Deactivated** for reference.

6. Click **Save**.

Method 2: Use the Remove User Access process

Use this method if you need to deactivate or terminate an employee and remove all time entries and time off requests for dates beyond the deactivation or termination date.

1. Select **My Employees > Employee Maintenance > Remove User Access**. The Remove User Access window opens.

2. Select the **Employee** by name from the drop-down list. Only active employees (and employees who report to you) are available to select.

3. Select the **New Status** from the drop-down list. These options are predefined for your company during the implementation process and only statuses that prevent the employee from signing in are available.

4. Select a **Deactivation Date** for audit purposes.

5. Optionally, enter a note in the **Change Reason** box.

6. Optionally, select the check box next to **Remove all time and time off entries for dates beyond the Deactivation Date** if the employee has future-dated requests or entries that are no longer applicable.

7. Click **Save**.

Mass editing employees

Company and system administrators can edit information for multiple employees at once using the **Mass Edit Employees** functionality.

When you use the mass edit process, you are applying the same changes to a group of employees. You can view and print (or save) an audit report of the changes at the end of the process.

Using Mass Edit Employees

To edit multiple employees at once:

1. Go to **My Employees > Employee Maintenance > Mass Edit Employees**. A list of all active employees opens.

2. Use the search fields and filters at the top of each column to find the employees you want to edit at once.

3. Select the check box to the left of each employee to include the employee in the mass update. Alternatively, select the check box at the top of the column to select all employees on all pages (matching your search or filter criteria, if applied).

4. Click the **Continue** button. A page opens with all fields available to update for the selected employees.

> **Tip:** Click **Selected Employees** to review a list of the employees you are about to edit.

5. Select the settings you want to update for the selected employees and click **Save**.

6. Confirm the number of employees you want to update and click **Continue**.

7. When the update is complete, the **Mass Edit Summary** window opens. Click **View Summary** to view and save a report of the changes.

8. Click **Close**.

Managing user access

When an employee is added to Sage Tracks, the employee is given a user account to access the program. Each user must be assigned a security profile (as described in Using Sage Tracks) to determine what information they can access in the program. Then, managers are assigned in groups to determine which employees they can view and what information they can edit.

> **Important!** Only company administrators with access to employee groups can designate managers and the employees who report to them.

Depending on your security profile, you can view and update employee information for the employees who report to you. This information may include:

- Demographics, such as address and contact information

- Profiles (for timesheets, schedules, time off, holidays, and so on)

- Labor allocation profiles (such as for departments and locations)

- Accrual (time off) balances
- Pay rates (if set up for your company in Sage Tracks)

About employee groups

Groups are used to create and manage which employees' information managers can view and edit. Access to features and employees depends on two things:

1. Security profiles determine if a user is a Company Administrator, Department Manager (or supervisor), or Employee, and which menus each user can access.
2. **Groups** determine which users, either Company Administrators or Department Managers, can view and edit information for defined or dynamic groups of employees.

All reports and lists are available for company administrators to view for all employees. However, managers (and supervisors) are limited to viewing information and reports only for those employees who report to them (in their assigned employee groups).

About the groups list page

To open the groups list page, select **Company Settings > Global Setup > Groups**.

You can use this page to:

- View the employee groups set up for your company.
- Edit existing groups.
- Delete existing groups.
- Create a new employee group.

Setting up employee groups

Groups are used to create and manage which employees' information managers can view and edit.

Creating a new group

1. Select **Company Settings > Global Setup > Groups**.
2. Click the **New Group** button. The **Group Settings** page opens.
3. Enter a **Name** for the group. This information is *not* visible to employees or their managers.
4. Select from the following **Group Type** :
    - **Fixed**. Select to set up a group with a manager and a defined or fixed list of employees. This group must be manually updated each time an employee should be added or removed (such

as when an employee is hired or terminated).

- **Dynamic**. Select for a self-managing group, to which users who meet specified criteria are automatically added. For example, a dynamic group is set up for your company administrator so that all users are automatically visible regardless of the status, including any employees who are hired or terminated.

5. Click **Save**. The Manager and Group Members panels open.

6. Click **Add Manager** in the Managers panel. The Manager permissions window opens.

7. Select   :

    a. In the **Managers** panel, click **Add Manager**.

    b. In the **Manager** window, select the manager by name from the drop-down list. This is the manager over this group of employees.

    c. Select the check boxes to specify the tasks the manager is able to perform:

        - Edit Employee Information
        - View Time Entries
        - Edit Time Entries
        - Approve Timesheet
        - Edit Time Off Entries
        - View Schedules
        - Edit Schedules

8. Click **Close**.

    > **Note:** You can click **Add Manager** again to set up another manager for this same group of employees.

9. If you selected to set up a **Dynamic** group, set up rules for the members:

    a. Click **Add Rule**.

    b. In the **Add Filter Rule** window, select rule options.

    c. Repeat steps a and b to add additional rules to filter and define the list of employees in this group.

    d. After you define all rules, click the **Users** tab to view which employees are currently in this group.

10. If you selected to set up a **Fixed** group, select the members for the group:

    a. Click **Manager Members**. The Members window opens.

    b. In the **Members** window, click the employees (by name) from the list to add them to the **Selected** list.

    c. Click **Save** to close the window. The members are added to the table in the group window.

11. Click **Save** to save your group settings.

Managing time

Managing your employees' time includes the following topics.

Managing timesheets

The following topics provide information on managing employee timesheets.

Managing employee timesheets

As a manager you can review, edit, approve, and reject timesheets for employees who report to you.

Approving (and rejecting) timesheets

1. Select **Manage Time > Timesheets > Pending Approval**.

   > **Tip:** To select another pay period, specify a date in that pay period for **Pay Period Including** and click **Show** to refresh the page with timesheets for that pay period.

2. Review   for each timesheet for the selected pay period:
   - Employee ID and Name
   - Timesheet Status (may be open, submitted, or never opened)
   - Number of Entries (the total number of time entries)
   - Missing Punches (any missing in or out time entries)
   - Total Time (the total hours for the pay period)
   - Pay Period Profile
   - Start and End Dates
   - Any defined labor allocations (such as Department and Location)

3. If you need to view the details or edit an employee's timesheet, click (Timesheet icon) in the employee's row.

   Make any necessary edits and save your changes before returning to the **Manage Time > Timesheets > Pending Approval** page.

4. When you're ready to act, you have

- **Approve**. Select one or more timesheets and click the Approve button. The timesheet status changes to "Approved." Approved timesheets are ready to export.

- **Approve All**. All timesheets shown for the pay periods that include the date selected will be approved when you click this button, regardless of missing punches.

> **Caution!** Before you use the **Approve All** or **Reject All** buttons, make sure that you have reviewed all timesheets in the table. Use the **Show [#] Entries** filter settings at the bottom of the page table to show all.

- **Reject**. Select one or more timesheets and click the Reject button. Once rejected, the timesheet status changes to "Open." You or the employee can now edit the timesheet and submit it for approval again.

- **Reject All**. All timesheets shown for the pay periods that include the date selected will be rejected when you click this button. Once rejected, the timesheets' statuses change to "Open." You or the employees can now edit the timesheet and submit them for approval again.

See also: Viewing all timesheets

Viewing current timesheets

As a manager you can review, edit, approve, and reject timesheets for employees who report to you.

Reviewing current timesheets

Select **Manage Time > Manage Timesheets > Current**. The Current Timesheets page opens with all timesheets for the current pay period.

- If you need to edit a timesheet, click 🕐 (Edit Timesheet icon) in the employee's row.

- Click ✏️ (Edit Employee icon) in an employee's row to open the Employee Information page.

- In the **Pay Period Including** box, select a date in the pay period for the timesheet you want to view, and click **Show**.

Viewing all timesheets

As a manager you can review, edit, approve, and reject timesheets for employees who report to you.

Reviewing all timesheets

Select **Manage Time > Manage Timesheets > All**. The All Timesheets page opens with all timesheets for the pay period you specify.

- If you need to edit a timesheet, click 🕐 (Edit Timesheet icon) in the employee's row.

- Click ✏️ (Edit Employee icon) in an employee's row to open the Employee Information page.

- In the **Pay Period Including** box, select a date in the pay period for the timesheet you want to view, and click **Show**.

Updating approved timesheets

If a timesheet was accidentally approved, or if you need to edit a timesheet after it is approved, contact your company administrator. The company administrator has permissions to reject approved timesheets so they can be updated.

Updating approved timesheets as a company administrator

If a timesheet was accidentally approved, or if the employee or manager need to edit an approved timesheet, you can reject the approved timesheet to open it for edits.

1. Select **Manage Time > Timesheets > All**.
2. In the **Pay Period Including** box, select a date in the pay period for the timesheet you want to edit, and click **Show**.
3. Scroll to the bottom of the timesheet and click the **Reject** button.
4. You, the manager, or the employee can now update the timesheet as needed.
5. After the necessary updates are completed, be sure to **Submit** and **Approve** the timesheet so it can be included in the export.

Viewing timesheets by pay period

As a manager you can review, edit, approve, and reject timesheets for employees who report to you.

Reviewing current timesheets

Select **Manage Time > Manage Timesheets > Current**. The Current Timesheets page opens with all timesheets for the current pay period.

- If you need to edit a timesheet, click 🕐 (Edit Timesheet icon) in the employee's row.

- Click ✏️ (Edit Employee icon) in an employee's row to open the Employee Information page.

Approving (and rejecting) timesheets

1. Select **Manage Time > Timesheets > Pending Approval**.

> **Tip:** To select another pay period, specify a date in that pay period for **Pay Period Including** and click **Show** to refresh the page with timesheets for that pay period.

2. Review the following information for each timesheet for the selected pay period:

   - Employee ID and Name
   - Timesheet Status (may be open, submitted, or never opened)
   - Number of Entries (the total number of time entries)
   - Missing Punches (any missing in or out time entries)
   - Total Time (the total hours for the pay period)
   - Pay Period Profile
   - Start and End Dates
   - Any defined labor allocations (such as Department and Location)

3. If you need to view the details or edit an employee's timesheet, click (Timesheet icon) in the employee's row.

   Make any necessary edits and save your changes before returning to the **Manage Time > Timesheets > Pending Approval** page.

4. When you're ready to act, you have the following options:

   - **Approve**. Select one or more timesheets and click the Approve button. The timesheet status changes to "Approved." Approved timesheets are ready to export.

   - **Approve All**. All timesheets shown for the pay periods that include the date selected will be approved when you click this button, regardless of missing punches.

     > **Caution!** Before you use the **Approve All** or **Reject All** buttons, make sure that you have reviewed all timesheets in the table. Use the **Show [#] Entries** filter settings at the bottom of the page table to show all.

   - **Reject**. Select one or more timesheets and click the Reject button. Once rejected, the timesheet status changes to "Open." You or the employee can now edit the timesheet and submit it for approval again.

   - **Reject All**. All timesheets shown for the pay periods that include the date selected will be rejected when you click this button. Once rejected, the timesheets' statuses change to "Open." You or the employees can now edit the timesheet and submit them for approval again.

Updating approved timesheets

If a timesheet was accidentally approved, or if you need to edit a timesheet after it is approved, contact your company administrator. The company administrator has permissions to reject approved timesheets so they can be updated.

Updating approved timesheets as a company administrator

If a timesheet was accidentally approved, or if the employee or manager need to edit an approved timesheet, you can reject the approved timesheet to open it for edits.

1. Select **Manage Time > Timesheets > All**.

2. In the **Pay Period Including** box, select a date in the pay period for the timesheet you want to edit, and click **Show**.

3. Scroll to the bottom of the timesheet and click the **Reject** button.

4. You, the manager, or the employee can now update the timesheet as needed.

5. After the necessary updates are completed, be sure to **Submit** and **Approve** the timesheet so it can be included in the export.

Using the manage daily time report

You can use the Manage Daily Time report to view a summary of employee timesheets for the selected pay period and easily make changes to the time entries on a single report.

The report includes the following information:

- Employee name and ID

- Employee status

- Timesheet profile (type)

- Links to the employee record and the employee timesheet

- Timesheet entries for the dates you specify

Using the manage daily time report

First, view the information for the dates you need to manage:

1. Select **Reports > Time Allocation > Manage Daily Time**. The report page opens.

2. In the **Date Selection** field:

    a. Select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.

    b. Optionally, select the **Missing Punch** check box to include days with missing punches in your view.

3. Click **Show**. The page refreshes with the timesheet entries for the pay period

Next, you can do the following on the report:

Change an existing time entry

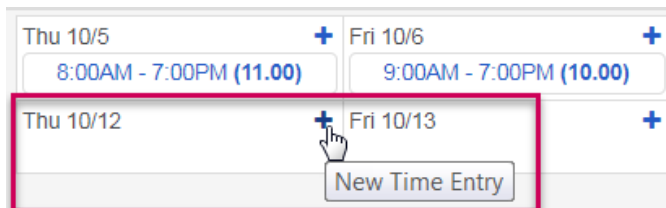1. Click the time entry you want to change. The time is highlighted orange when you mouse over it.
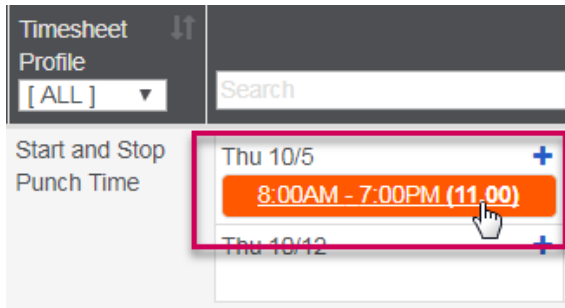
2. In the timesheet row that opens, edit the labor allocations, date, times, time off, or total times.

3. Click **Save**.

After editing, the timesheet entry is highlighted blue.

Add a new time entry

1. Next to the date you want to add an entry, click ✛ (New Time Entry icon).

2. In the timesheet row that opens, add the labor allocations, date, times, time off, or total times.

3. Click **Save**.

After adding information to a date, the entry is highlighted blue.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

Managing time off

The following topics provide information on managing time off and time off accruals.

Managing time off accruals

You can use the **Accruals** feature to track time off, time off requests, and manage time off accruals for your employees.

> **Note:** The **Accruals** feature is an optional component of Sage Tracks and displays only if the feature is set up. Contact your System Administrator to add this feature to your system.

If your employees accrue time off, such as vacation or sick leave, use the **Accrual Profiles** page to maintain the plan rules. Once the rules are defined, the profiles can be assigned to employees.

Updating time off accrual profiles for an employee

Profiles are used to manage the rates and rules for accruing time off.

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. On the **Employee Information** page, scroll down to the **Profiles** panel.

4. Next to the **Accrual Profile**, select the time off accrual profile for this employee.

5. Click **Save**.

Viewing time off accrual balances for an employee

You can view the accrued time off balances for a single employee.

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. On the **Employee Information** page, scroll down to the **Accruals** panel.

4. View the balances for each time off type for this employee.

   - **Time Off**. The type of accrued time off assigned to the employee.

   - **Balance**. Balance earned.

   - **Updated to Date**. The date to which the accrual is calculated or updated.

   - **Security Profile**. Whether the user is an Employee, Department Manager (or Supervisor), or Company Administrator.

   - **Pay Calculation**. The pay calculation profile assigned to the employee.

> **Tip:** To view accrual balances for all employees, use the Accrual Balance report.

Manually updating accrual balances for an employee

If accruals cannot be automatically calculated, or if you need to make a manual adjustment, you can manually update the accrual balances for the employee.

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon ( ) next to the employee you want to view. The Employee Information page opens.

3. On the **Employee Information** page, scroll down to the **Accruals** panel (lower right).

4. Next to the **Time Off** type you want to manually update, click the **Edit Balance** icon.

	Time Off	Accrued To Date	Accrued Hours	Taken	Balance	Scheduled	Pending Approval
✏ ⚙ 🔍	Vacation Pay	3/20/2017	4160.00	32.00	4128.00	0.00	0.00
✏ Edit Balance	Personal Time Pay	3/20/2017	52.00	0.00	52.00	0.00	0.00
✏ ⚙ 🔍	Holiday Pay	3/20/2017	2496.00	8.00	2488.00	0.00	0.00

5. Enter or select the following:

   - **Accrued to Date**. Select the date to which you want the time off accrued.

   - **Balance**. Enter the balance in hours.

   - **Comment**. Enter a comment or notes for audit purposes.

6. Click **Save**

Using the accrual balances report

If you use the Accruals feature to track time off, time off requests, and manage time off accruals for your employees, you will have access to the **Accrual Balances** report.

To view the report, go to **Reports > Time Allocation > Accrual Balances**.

Calculating time off accruals

Time off accruals are typically set up to calculate automatically with each pay period. However, you may be required to calculate accruals for a new employee, or outside of the pay period schedule.

> **Important!** When adding a new employee, you can calculate time off accruals for the prior 365 days (or less). If an employee's accrual period to calculate is greater than 12 months, the Calculate Accruals icon

will be grey (⚙) and not available to click. In this case, you must edit the employee's accrual balances and manually enter the totals.

To calculate an employee's time off accruals:

1. Select **Reports > Time Allocation > Accrual Balances**.

2. On the **Accrual Balances** page,

   - **Time Off**. The type of accrued time off assigned to the employee.

   - **Balance**. The balance earned for the time off type.

   - **Updated to Date**. The date to which the accrual is calculated or updated. This date depends on how the accrual rules are set up. For example, if an accrual is awarded at the end of a pay period, this date reflects the first day of the current pay period. If the accrual is awarded at the start of a pay period, this date reflects the last date of the previous pay period.

   - **Security Profile**. Whether the user is an Employee, Department Manager (or Supervisor), or Company Administrator.

   - **Pay Calculation**. The pay calculation profile assigned to the employee.

3. Sort and filter the information so you can view the employee whose time off accruals must be calculated.

4. In the **Time Off** column, click the **Calculate Accrual** icon (⚙) next to the employee's time off type.

   > **Note:** If an employee's accrual period to calculate is greater than 12 months, the Cannot Calculate icon ⚙ displays here. You must go to the employee's record and manually update the employee's accrued time in this case.

5. In the **Up to Date** field, select the date to which you want the accrual to calculate. If you select **Calendar Date**, you must specify a **Cycle Start Date**, which is the precise date to which you want to accrue time.

6. Click **Calculate**. The system may take a moment to calculate the accruals.

7. Once the calculation is complete, a summary page with the accruals appears. Click **Close**.

Viewing all time off requests

You can use the Time Off > **All Requests** page to view all time off requests for the employees who report to you.

The page includes the following information:

- Employee name and ID

- Employee status

- Time off accrual balance

- Time off date

- Time off type

- Request status

- Time off start and end times

- Total time off per date

Using the all time off requests page to manage accrual balances

You can use the All Time Off Requests page to view, update, and calculate time off accruals for individual employees.

1. Select **Manage Time > Time Off Requests > All Requests**.

2. In the **Balance** column, click the balance (in blue font) you want to view, update, or calculate. The **Accruals** window opens.

3. Next to the **Time Off** type you want to manually update, click one of the following:

    - ✏️ (Edit Balance) - Click to manually edit the accrual balance.

    - ⚙️ (Calculate Accruals) - Click to calculate the accrual balance based on the accrual rules set up.

    - ⚙️ (Cannot Calculate) - If this icon is visible, the accruals cannot be calculated automatically because the time frame to calculate is too great. You must manually edit the balance in this case.

    - 🔍 (View All History) - Click to view the accrual calculation log. This includes automatic calculations and manually-added balances.

4. After you make changes, click **Save**.

5. If you don't have any changes, click **Close**.

Viewing time off requests pending approval

As a manager you may need to approve and reject the time off requests for employees who report to you.

Approving time off requests

To approve time off requests:

1. Select **Manage Time > Time Off Requests > Pending Approval**.

2. The **Time Off Requests Pending Approval** page opens.

3. Next to the time off request you want to approve, click ✅ (**Approve Time Off Request**).

4. The page refreshes and the request is now approved. The employee can see the request is approved on their personal dashboard.

Rejecting time off requests

To reject time off requests:

1. Select **Manage Time > Time Off Requests > Pending Approval**.

2. The **Time Off Requests Pending Approval** page opens.

3. Next to the time off request you want to reject, click ✖ (**Reject Time Off Request**).

4. The page refreshes and the request is now rejected. The employee can see the request is rejected on their personal dashboard.

Managing schedules

The following topics provide information on managing schedules for your company and employees.

Managing schedules

If you're using the predefined company schedules and personal schedules, you can use several reports to view and manage the schedules for the employees who report to you.

Viewing schedules on a daily or weekly basis

Use the **Weekly/Daily Calendar** to view a summary calendar of the employees scheduled for a particular day or week.

1. Select **Manage Time > Scheduling > Weekly/Daily Calendar**. The calendar opens to the default weekly view.

2. The calendar includes
   - Click the **day** button to toggle the view to a single day.
   - Click the **week** button to toggle the view to a full week.

   - Click the navigation arrows to view the previous or next days or weeks in the calendar.

- Click an employee name in the schedule to view a pop-up window with the schedule details for that day.
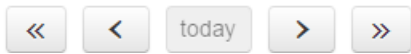
Viewing schedules on a monthly basis

Use the Monthly Calendar to view a summary calendar of the employees scheduled for a particular month.

1. Select **Manage Time > Scheduling > Monthly Calendar**.

2. The calendar includes

   - Click the navigation arrows to view the previous or next month in the calendar.

> **Note:** It can take a few seconds for the calendar to refresh when you toggle to previous or next months.

   - Click an employee name in the schedule to view a pop-up window with the schedule details for that day.

Viewing and updating weekly schedules

Depending on your security permissions, you may be able to use the Weekly Schedules feature to view and update schedules for the employees who report to you.

To view all employees scheduled to work:

1. Select **Manage Time > Scheduling > Weekly Schedules**. The Weekly Schedules page opens.

> **Tip:** To view the weekly schedule for all employees at once, you may need to change the table view settings to show more entries. Click the number at the lower left corner of the table to change the number of entries that show at once.
>
>
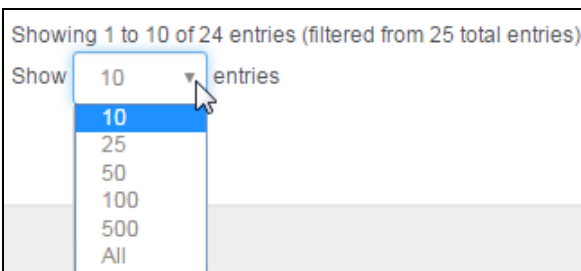
2. To view another week, specify any date in that week for **Date Selection** (upper-right side of the page).

3. Click **Show** to update the page and show the week including your selected date.

To update an employee's schedule in the weekly schedule:

1. For the date you want to change, click in the date column in that employee's row. You can click a date box with or without an existing schedule to update it.

2. On the schedule detail window, make the necessary edits to this employee's schedule for this day.

3. Click **Save**. If you changed the schedule, it now displays with a green background in the table.

Weekly Schedules

	Employee ID Search Employee	Name	Employee Status Active ▾	Mon Mar 27 Search Mon Mar 27	Tue Mar 28 Search Tue Mar 28	Wed Mar 29 Search Wed Mar 29	Thu Mar 30 Search Thu Mar 30	Fri Mar 31 Search Fri Mar 31	Sat Apr 01 Search Sat Apr 01	Sun Apr 02 Search Sun Apr 02
✎ ⊙ 👤 20015		Employee Name	Active	6:00 PM - 10:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM		

Showing 1 to 1 of 1 entries (filtered from 25 total entries)

Show 25 ▾ entries

First Previous **1** Next Last

The employee can now view the updated schedule on the **My Schedule** panel on their dashboard when he or she signs in to Sage Tracks.

Setting up employee schedules

Your employees' schedules can be controlled by system-generated, rotation-based company schedules, or you can create personal schedules just for the individual employee. Schedules can be changed at any time and are immediately updated for the employee to view.

Assigning a company schedule profile to an employee

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon (✎) next to the employee you want to view. The Employee Information page opens.

3. Scroll down to the **Scheduling** panel.

4. Next to **Schedule Type**, select **Company Schedule**.

5. For **Company Schedule**, select from a list of company schedules set up for your company.

6. Click **Save**. The employee can now view the schedule on the **My Schedule** panel on his or her dashboard when signed in to Sage Tracks.

Defining a personal schedule for an employee

If your employee has a unique work schedule, you can define it on the employee's account.

1. Select **My Employees > Employees > Employee List**.

2. Click the **Edit** icon (✎) next to the employee you want to view. The Employee Information page opens.

3. Scroll down to the **Scheduling** panel.

4. For **Schedule Type**, select **Personal Schedule**.

5. Click the **Personal Schedule** tab, which appears at the top of the Employee Information page.

6. In the **Personal Schedule Settings** panel:

    a. Enter the **# of Days** in the schedule cycle. For example, enter 7 for a repeating weekly schedule.

    b. For **Anchor**, select a start date for the schedule cycle. If you select a 7-day or 14-day cycle, the day of the week you select here will always be the first day of the schedule.

    c. Click the **Save** button. The page refreshes and the **Work Schedule Rules** panel updates with your settings.

7. In the Personal Schedule > **Work Schedule Rules** panel, do one of the following for each day listed:

    - Select a rule from the **Daily Rule** drop-down list. The Start, End, and Total fields automatically fill with the information from the daily rule.

    - Manually enter a **Start Time**, **End Time**, and **Total** hours.

      > **Note:** For days that employees don't work, leave the lines blank.

8. Click **Save**.

    The employee can now view the schedule on the **My Schedule** panel on their dashboard when they sign in to Sage Tracks.

Next steps: Managing employee schedules

Setting up company schedules

You can use company schedules to create sophisticated cycles of schedules for your employees to reference, and to help you manage staffing at your company.

Before you start

Consider setting up daily rules, which set specific start and end times, to quickly create your company schedules.

Creating company schedules

You aren't required to set up daily rules to use in the company schedules, however, it saves time if you have standard start and end times. Otherwise, you can manually enter the start and end times when creating a new company schedule.

To add a company schedule:

1. Select **Manage Time > Scheduling > Set Up Company Schedule Profile**. The company schedules list page opens.

2. Click the **Add Company Schedule** button. The company schedule page opens.

3. Enter or specify the following:

- **Name**. Enter a meaningful name to describe this schedule. You'll refer to this name when you assign the schedule to the employee.

- **Description**. (Optional) Enter a brief description that is visible only on this page.

- **#of Days**. Enter the number of days in the schedule cycle. For example, enter 7 for a repeating weekly schedule.

- **Cycle Start Date**. Click the date field to select a start date (day of the week) for the schedule cycle.

4. Click the **Save** button. The page refreshes and the Daily Rules panel appears with your settings.

5. In the **Daily Rules** panel, do one of the following for each day listed:

- Select an rule from the **Daily Rule** drop-down list. The Start, End, and Total hours automatically fill with the information from the daily rule.

- Manually enter a **Start Time**, **End Time**, and **Total** hours.

  > **Note:** For days that employees don't work, leave the lines blank.

6. Click **Save**.

Next steps: Now that the company schedule profiles are set up, you can assign them to employees or define personal schedules for individual employees.

Setting up daily rules

Once daily rules are set up, they can be quickly applied to an employee's timesheet in the Manage Daily Time report, or plugged into the cycles in a company schedule profile.

To add a daily rule:

1. Select **Manage Time > Scheduling > Set Up Daily Rules**. The daily rules list page opens.

2. Click the **Add Daily Rule** button. The Daily Rule window opens.

3. Enter or specify the following:

- **Name**. Because you'll use this daily rule as a shortcut when editing schedules, enter a meaningful name to describe this daily rule. For example, if the schedule is 9 am to 5 pm, name the rule "9 am to 5 pm."

- **Description**. (Optional) Enter a description, which is only visible on this page.

- **Start** and **End** times. Enter the time for the daily rule schedule to start and end.

- **Total**. Enter the total time to be recorded for this rule in hours.

4. Click **Save**. Now that you have your daily rule created, you can use it when creating a new company schedule.

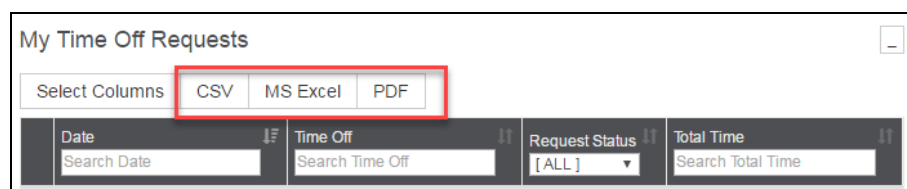**Next steps**: Now that the daily rules are created, you can use them to create a company schedule.

Using reports

Sage Tracks offers many reports to help you manage your company's time and attendance.

Using Sage Tracks reports

All reports are available for company administrators to view for all employees. Managers and supervisors are limited to viewing information only for those employees who report to them (as defined in employee groups).

> **Tip:** Most reports and tables of information in Sage Tracks can be exported to a CSV (comma delimited), Microsoft Excel, or PDF file. Click the buttons at the top of the report or table to export the information to a file.
>
> | My Time Off Requests | | | | _ |
> | --- | --- | --- | --- | --- |
> | Select Columns | CSV | MS Excel | PDF | |
>
> | Date | Time Off | Request Status | Total Time |
> | --- | --- | --- | --- |
> | Search Date | Search Time Off | [ALL] ▼ | Search Total Time |

Calendars

Calendar reports are real-time calendars that you can use to view information by month, week, or day. Use the time-period buttons at the top of the calendar to switch views: [month | week | day]

- **Anniversary**. Employment anniversaries for the employees to which you have access.
- **Birthday**. Employee birthdays highlighted by month (without birth year for privacy purposes).
- **Time Off**. Approved time off requests. Click an entry on the calendar to view the time off request in a pop-up window.

Time Allocation

Hours are shown by day on each of these reports. Click 🕐 (timesheet icon) to view an employee's timesheet. Click ✏ (edit) to view and edit any employee record.

- **Time Summary By Week**. A summary of employee time for the previous, current, and future week or month.

- **Daily Time Detail**. Daily time with individual punches recorded.

- **Manage Daily Time**. Time entries grouped by employee. Click any time entry to edit it. Click the ✚ (Add icon) in a date box to add a time entry on that date for that employee. Select the **Missing Punch** check box (in the upper-right side of the panel) to view timesheets with a missing time entry (in or out).

- **Daily Time Totals**. Time entries totaled by day for each employee.

- **Dot Board**. Real-time report of employees punched in at the time you open the report.

- **Accrual Balances**. Per employee, per time off category accrued. Shows number of days earned, taken, scheduled, and remaining.

- **Punch Map**. If you use the geofencing feature, you can use the punch map to see where all of your employees are punched in at any given time.

Calculated Time

- **Calculated Time Summary**. A summary of the calculated time, as it will be recorded in the export file, listed by pay category (such as Hourly, Salary, Overtime) and time off type (if you use the time off feature).

Setting up saved and email reports

Use the Saved Reports feature to save filter criteria for reports, which you can use when you schedule automatic emails with that report criteria.

Currently, this feature is available on the following pages:

- Employee List
- Extra Pay Detailed Entries (report)
- Extra Pay Summary by Date (report)

> **Note:** As we incrementally update Sage Tracks, we will make this feature available on other list and report pages.

Filtering information in your report

Before you save report settings, you can filter the information to be included.

1. Enter information of your choice in the search and filter boxes at the top of the list.

   For example, if you want to include both Active and Terminated employees, clear the word "Active" from the **Employee Status**heading. To include only employees and exclude managers from your saved report, type "employee" in the **Security Profile** heading.

2. Click **Refresh List** to update the page with your filter criteria applied.

3. Repeat these steps until the list reflects the information you want in your saved report.

Changing the columns in your report

Before you save your report, you can also add or remove the columns on the page to refine the information in your report.

1. In the upper left side of the page, select **Settings > Select Columns**. The Select Columns window opens.

2. To remove a column from your report, click the column name in the **Selected** list. The column name moves to the Available list.

3. To add a column from your report, click the column name in the **Available** list. This moves it to the Selected list.

4. Click **Save** to save your changes and close the window.

Saving your report

When the correct information is showing on your list page, you can save your settings.

1. In the upper left side of the list page, select **Settings > Save Report**. The Save Report window opens.

2. Enter a **Report Name**.

3. Select the **Default** check box if you want to view this same information (with the specific columns and filters applied) each time you open this page.

4. Click **Save**. The **Selected Report** menu appears. You will use this menu to toggle between the reports you have saved.

Scheduling an email report

1. In the upper left side of the list page, select **Settings > Schedule Email**.
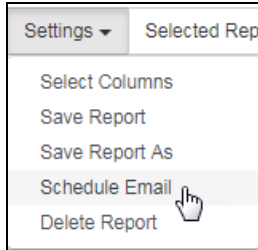
2. In the **Scheduled Email** window, click the **New Email Report** button.

3. In the **Email Settings** window, enter

- **Name**. Enter a meaningful name to describe this scheduled email. It's only visible to you.

- **Active**. Clear this check box if you want to temporarily suspend the scheduled email.

- **Send email only if not blank**. Select this check box if your report criteria returns zero results and you want to suspend the email in this scenario.

- **Send report with my permissions**. Use this option with caution. It will allow the recipient of your email report to view report details with your level of access.

  For example, if your permissions allow you to view all employee pay rates and you send this report to employees, when you select this check box the employees will also see all employee pay rates.

- **Include me as a recipient**. Select this check box if you also want to receive the email.

- **Recipients > Specific User**. Use the drop-down menu to select an employee or manager by name.

- **Recipients > Specific Group**. Use the drop-down menu to select an employee Group.

- **Subject**. Enter an email subject.

- **File Type**. Select from CSV (comma separated values), MS Excel, or PDF. The report will be sent as an attachment of this type when emailed.

- **Frequency**. Click to select the hour, minutes, and days of the week for which you want this report to be emailed.

Note: The time defaults to each recipient's time zone. For example, if you select 8:00 a.m., and you select recipients who are in California and New York, the system will automatically send the report via email at 8 a.m. Pacific Time for those employees in California and at 8 a.m. Eastern Time for employees in New York.

4. Click **Save**.

Next step:

Viewing daily time details

You can use the Daily Time Details report to view the start and end times, total time, labor allocations for each timesheet entry detailed by day.

The report includes the following information:

- Employee name and ID
- Employee status
- Timesheet profile (type)
- Start date
- Start and end times
- Total time
- Labor allocations
- Links to the employee record and the employee timesheet

Using the daily time details report

To view the information for the dates you want:

1. Select **Reports > Time Allocation > Daily Time Details**. The report page opens.
2. In the **Date Selection** field, select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.
3. Click **Show**. The page refreshes with the daily time for the dates you specified.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

Viewing daily time totals

You can use the Daily Time Totals report to view the total time for each timesheet entry summarized by day.

The report includes the following information:

- Employee name and ID
- Employee status
- Pay period profile (such as biweekly or weekly)
- Timesheet profile (type)
- Date
- Total time
- Links to the employee record and the employee timesheet

Using the daily time details report

To view the information for the dates you want:

1. Select **Reports > Time Allocation > Daily Time Totals**. The report page opens.
2. In the **Date Selection** field, select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.
3. Click **Show**. The page refreshes with the totals for the dates you specified.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

Using the punch map

You can use the Punch Map as an easy way to view your employees clock in and out by location. The map can be viewed live, or you can use the **Query** feature to find and view historical punches by date, employee, and labor allocations (such as locations). The punch map is available only if you use the GPS feature.

Before you start

1. Your system administrator must:
   - Enable **GPS** for your company.
   - Enable **GPS Tracking** on your timesheet profiles.

2. For each role that should view the punch map, the security profiles must be updated to access the punch map.

   a. Sign in to Sage Tracks as a Company Administrator.

   b. Go to **Company Settings > Security Profiles** and select the security profile that should view the punch map.

   c. Click the **Menu** tab.

   d. Under the **Time Allocation** section, select the check box for **Punch Map**.

Using the punch map

To view the punch map, select **Punch Map** from the top menu.

The punch map offers the following features:

- **Live**. Click this switch in the upper-right corner of the map to view live punches (in and out).
- **Map/Satellite**. Click the Map or Satellite to toggle between the two types of map views.
- **Query**. Use the Query panel to search for historical punches based on specific dates, employees, or locations.
- **Punches**. The punches list (in the lower-right section of the page) provides a list of punches based on your page settings (such as query or live).

> **Note:** The radius of each punch reflects the accuracy of the employee's device and signal when punching in or out.

Viewing the extra pay summary report

If you use the Extra Pay feature (set up on the timesheet by your system administrator), you can use the Extra Pay Summary report. The report shows timesheet entries for extra pay amounts with pay categories, time off, and labor allocations summarized and totaled.

The report includes the following information:

- Employee name and ID
- Employee status
- Security profile
- Pay calculation (such as salary or hourly)
- Timesheet profile (type)
- Extra pay amounts entered by pay category, time off, and labor allocation
- Links to the employee record and the employee timesheet

Using the extra pay summary report

To view the information for the dates you want:

1. Select **Reports > Extra Pay > Summary**. The report page opens.

2. In the **Date Selection** field, select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.

3. Click **Show**. The page refreshes with the extra pay entries for the dates you specified.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

See also: Setting up saved and email reports

Viewing the extra pay detailed entries report

If you use the Extra Pay feature (set up on the timesheet by your system administrator), you can use the Extra Pay Detailed Entries report. The report shows detailed timesheet entries for extra pay amounts with pay categories, time off, and labor allocations.

The report includes the following information:

- Employee name and ID
- Employee status
- Security profile
- Pay calculation (such as salary or hourly)
- Timesheet profile (type)
- Entry date
- Extra pay amounts entered by pay category, time off, and labor allocation
- Links to the employee record and the employee timesheet

Using the extra pay detailed entries report

To view the information for the dates you want:

1. Select **Reports > Extra Pay > Detailed Entries**. The report page opens.

2. In the **Date Selection** field, select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.

3. Click **Show**. The page refreshes with the extra pay entries for the dates you specified.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

See also: Setting up saved and email reports

Viewing the calculated time summary report

You can use the Calculated Time Summary report to view a summary of time entries after the system calculates the totals based on rules set up for your company's pay rates, categories, time off, and extra pay (if applicable).

The report includes the following information:

- Employee name and ID
- Employee status
- Timesheet profile (type)
- Rates (if set up for your company)
- Hours entered by pay category (such as regular, overtime, or holiday pay)
- Amounts entered as extra pay (by pay category)
- Links to the employee record and the employee timesheet

Using the calculated time summary report

To view the information for the dates you want:

1. Select **Reports > Calculated Time > Calculated Time Summary**. The report page opens.
2. In the **Date Selection** field:
   a. Select either **Pay Period**, **Specific Date**, or **Date Range** and enter the date you want to view.
   b. Optionally, select the **Missing Punch** check box to include days with missing punches in your view.
3. Click **Show**. The page refreshes with the timesheet entries for the dates you specified.

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

Viewing the Dot Board

You can use the Dot Board to view the employees currently clocked in.

To view the Dot Board, select **Reports > Time Allocation > Dot Board**.

Dot Board						_
Select Columns	CSV	MS Excel	PDF			

Employee ⬇	Employee Status ⬍	Time ⬍	Location ⬍	Department ⬍	Job (Sales Venues) ⬍
Search Employee	Active ▾	Search Time	[ALL] ▾	[ALL] ▾	[ALL] ▾
🕐 Rosalita Swaniawski	Active	3.75 Hours	North	Potter	Community Cafe
🕐 Anna Bella Wilson	Active	10.75 Hours	North	Trimmer	The Pottery Farm Store
🕐 Adam Herzog	Active	9.75 Hours	East	Trimmer	Pierce Street Market

Showing 1 to 3 of 3 entries

Show 10 ▾ entries

First Previous **1** Next Last

The report includes the following information:

- Employee name
- Employee status
- The amount of time the employee has been clocked in (at the time you view the report)
- The labor allocations associated with the employee's current time
- Links to the employees' timesheets

To print or save the report:

Click the **CSV**, **MS Excel**, or **PDF** buttons in the upper-left corner of the report. The report file is saved to your Internet browser downloads folder. Double-click the report to open it, and then you can save or print it.

Exporting timesheets for payroll

When you're ready to export timesheets or time entries for payroll processing, you use the **Export Time** wizard.

About formatting the timesheet export file

When you first set up Sage Tracks for your company, you work closely with your implementation specialist to configure the program for your company's needs. Part of the configuration includes setting up and defining the information included in the timesheet export file. If you need to change the timesheet information that is exported or the format of the file to integrate with your payroll program, contact Customer Support.

Using the export time wizard

Typically, the **Export Time** feature is available only to company administrators who have access to information for all employees. This is because the timesheets can be exported only for the employees to whom you have access.

When you are ready to export timesheets for payroll:

1. Select **Export Time** from the top menu bar. The **Select a Pay Period to Export** page opens with the most recently-ended pay periods highlighted in green.

2. Use the **Pay Period Date Selection** field to select any day in the pay period you want to export and click **Show**.

3. When you find the pay period you want to export, click the **Export Time** button in that row. The 5-step wizard starts.

4. In Step 1 of the export, you **Review Time Off**. If there are any time-off requests pending approval for the pay period you are exporting, they display here.

   - ✅ Approve the request

   - ✳️ Reject the request

   - ✏️ View or edit the employee record

     > **Caution!** Any time off requests that are not approved will not be included in the export file.

5. After reviewing and addressing any pending time off requests, click **Next**.

6. In Step 2 of the export, the **Review Time** page shows the total time in each pay category for the pay period selected to export.

    - If a scheduled time entry is missing, the row is highlighted in red.

    - If a timesheet hasn't been approved by a manager, the row is highlighted in yellow.

    > **Caution!** Employees with incomplete or unapproved time entries will not be paid for those entries.

7. If you need to edit a time entry or approve a timesheet, click the **Edit Timesheet** button in that row.

8. After reviewing the time entries, click **Next**.

9. In Step 3 of the export, the **Preview the Export** page shows you all time entries with related pay categories (such as Hourly, Salary, Overtime) and any applicable labor allocations (such as Departments and Locations) as they will appear in the export file.

10. After reviewing the information to export, click **Next**.

11. In Step 4 of the export, the **Export the File** page shows the export file format and file name. You may have multiple export file formats set up for your company if you export timesheets both with and without labor allocations or for different payroll programs.

12. Optionally, you can edit the **File Name** to your preference.

13. When ready, click the **Export** button below the Payroll Format you want to export. The program generates the file and depending on your Internet browser settings, you may be prompted to download and save the file.

    > **Note:** You can edit the **Export Date Range** dates on this page. Use this feature with caution, as it allows you to export snippets of timesheets out of context of the payroll period. We recommend that you do not change the export dates unless you are changing pay period dates and you need to process a partial pay period.

14. Click **Next**.

15. When ready, click **Lock Timesheets**. This setting ensures that the timesheets cannot be exported again and prevents accidentally paying your employees for time worked more than once.