



Sage Tracks

Department Manager Guide

October 2017

This is a publication of Sage Software, Inc.

© 2017 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: October 30, 2017

Contents

- About Sage Tracks 1
 - Using Sage Tracks 1
 - Common icons and page functions 2
- Signing In 4
 - Signing in from your computer 4
 - Signing in from your mobile device 4
 - Changing your password 5
- Maintaining your account 7
 - Viewing and updating your information 7
- Managing user access 8
- Managing employee timesheets 9
 - Approving (and rejecting) timesheets 9
 - Managing time off accruals 10
 - Managing schedules 12
- Using Sage Tracks reports 15
 - Calendars 15
 - Time Allocation 15
 - Calculated Time 16
- Using your dashboard 17
 - My Employees 18
 - Self Service 18
 - Using your timesheet 18
 - Requesting time off 21

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

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
	The placeholder employee image.

Signing In

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

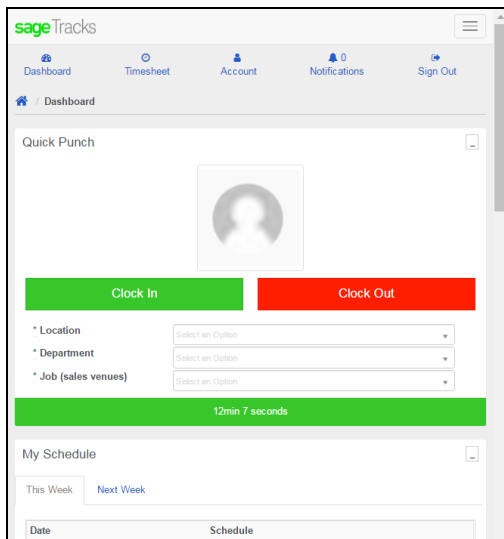
Signing in from your computer

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**.

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.

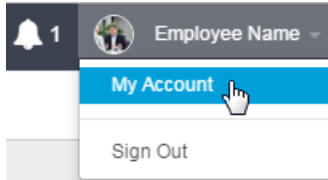
Tip: If your company uses GPS geofencing or picture taking for time entry, you must allow access to your location and camera, and you must be at your job site when you clock in or out.



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**.

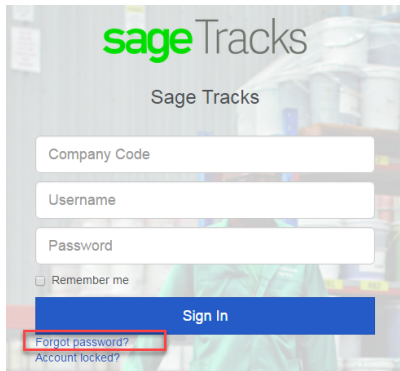


2. In the **User Settings** panel, enter and confirm your new password. Passwords must be at least 8 characters and include a capital letter, a lowercase letter, and at least one numbers.
3. Click **Save**.

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.

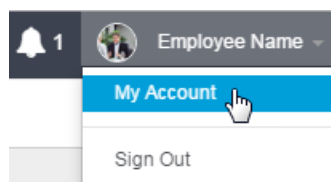
Maintaining your account

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

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](#)

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.

Accruals							
	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
	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**

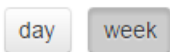
Managing schedules

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.

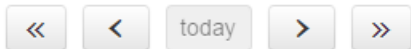
Viewing schedules on a daily or weekly basis

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.

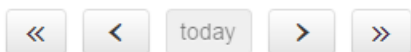


- Click an employee name in the schedule to view a pop-up window with the schedule details for that day.

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.

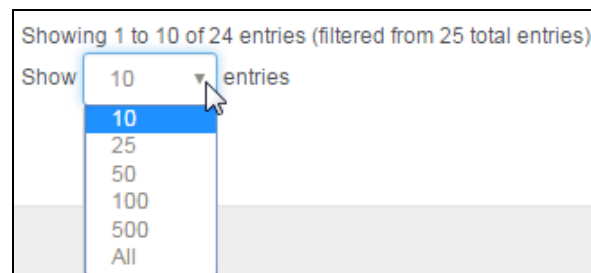
Viewing and updating weekly schedules

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.

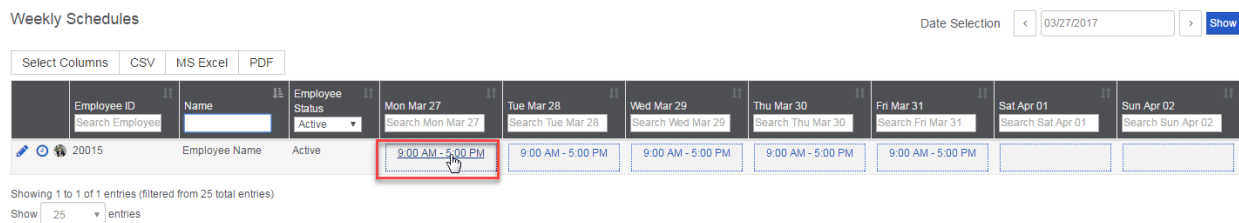


2. To view another week, specify any date in that week for **Date Selection** (upper-right side of the page).
3. Click **Show** to update the page and show the week including your selected date.



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.

Employee Name - 3/27/2017

Daily Rule Settings

Daily Rule

Select **Previous Day** if the **Start Time** falls on the day before the **End Time**.

Previous Day	Start	End	Total
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Close Save

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

Weekly Schedules Date Selection < 03/27/2017 > Show

Select Columns CSV MS Excel PDF

Employee ID	Name	Employee Status	Mon Mar 27	Tue Mar 28	Wed Mar 29	Thu Mar 30	Fri Mar 31	Sat Apr 01	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

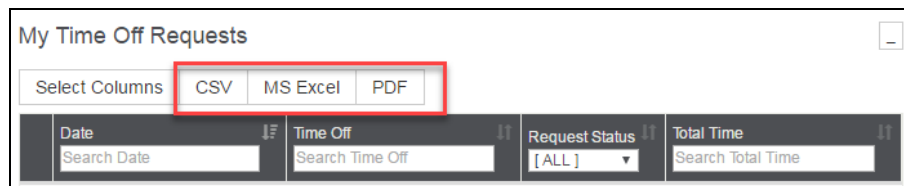
First Previous 1 Next Last

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.

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.





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).

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.

Quick Punch



* Location x v

* Department x v

* Job (sales venues) x v

Not Clocked In

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.

Dashboard My Timesheets Friday, February 24 - 7:22:45 pm EST

Not Clocked In

Suwanee King St Martin F

Clock In Clock Out

* Location Select an O...
* Department Select an O...

February 2017

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	1	2	3	4

Timesheet Daily Details Summary

02/24/2017

Location	Department	Date	Time Off	Start Time	End Time	Total Time
Select an Option	Select an Option	02/24/2017				

Save Add Row Submit

<< Previous Timesheet Next >>

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.

- 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.

Location	Department	Time Off	Mon (2/20)	Tue (2/21)	Wed (2/22)	Thu (2/23)	Fri (2/24)	Sat (2/25)	Sun (2/26)
North	Sales	Select an Option	8	8	8	8			
Select an Option	Select an Option	Vacation					8		
			0.00	0.00	0.00	0.00	0.00	0.00	0.00

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.

- Select **My Timesheets**. The timesheet opens to the current pay period.
- Click the Extra Pay tab of the timesheet.

Date	Pay Category	Time Off	Location	Department	Job (Sales Venues)	Amount
10/30/2017			Select an Option	Select an Option	Select an Option	\$ e.g. 8.88

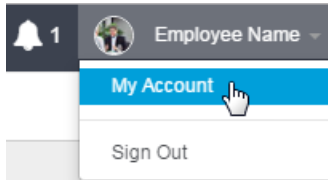
- Select the **Date** for which you want to enter a dollar amount.
- If your company has set up associated pay categories, select the **Pay Category** to which this amount should be reported.
- If applicable, select the time off type and labor allocations (such as location and department).
- Enter the **Amount** in numbers up to 2 decimal places.
- Click **Save**.
- 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.