Sage Tracks

Employee Quick Start 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

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

Using your dashboard 8

Using your timesheet 9

Entering your time on a Timestamp timesheet 9

Entering your time in a Bulk Hours timesheet 10

Entering extra pay 10

Requesting time off 12

To view your accrued time off balance 12

To request time off 13

Signing In

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

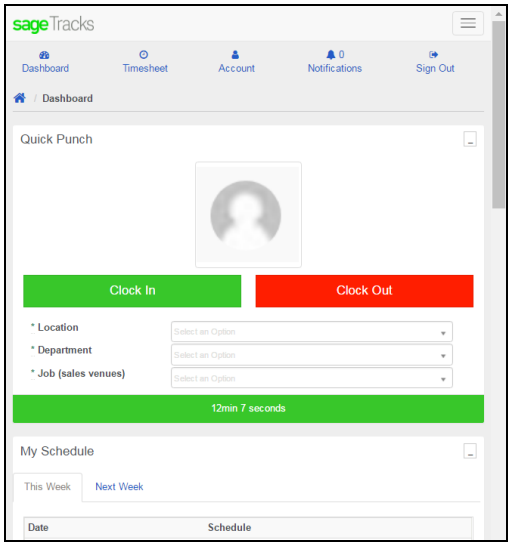
Signing in from your computer

To sign in to Sage Tracks, go to the website provided by your 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 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.

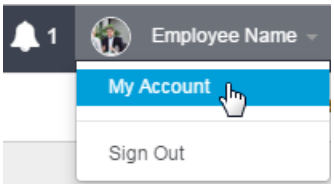
Tip: If your company uses GPS geofencing or picture taking for time entry, you must allow access to your location and camera, and you must be at your job site when you clock in or out.



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**.

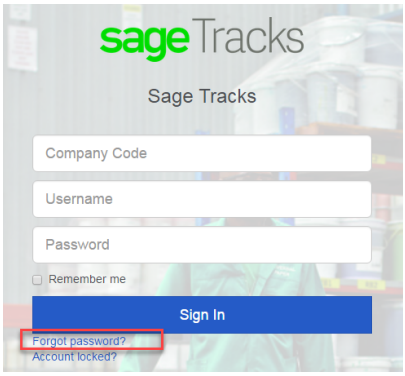


2. In the **User Settings** panel, enter and confirm your new password. Passwords must be at least 8 characters and include a capital letter, a lowercase letter, and at least one numbers.
3. Click **Save**.

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.

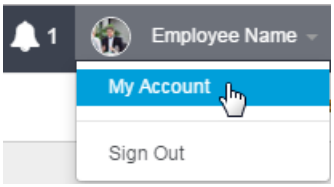
Maintaining your account

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 Default Screen, and to enable multi-factor authentication.
4. Click **Save**.

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).

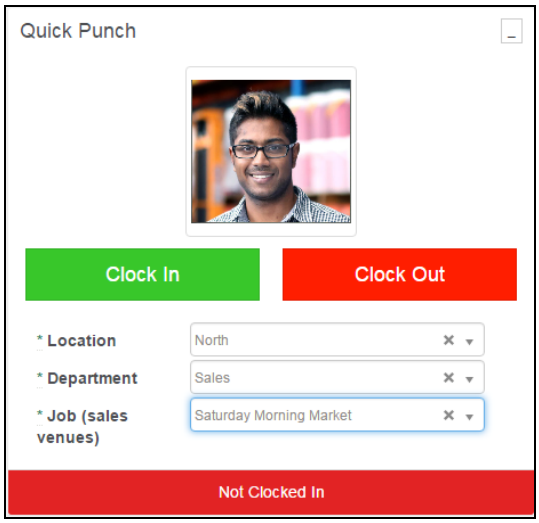
When you sign in to Sage Tracks, your personal dashboard opens.

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.

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.



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.

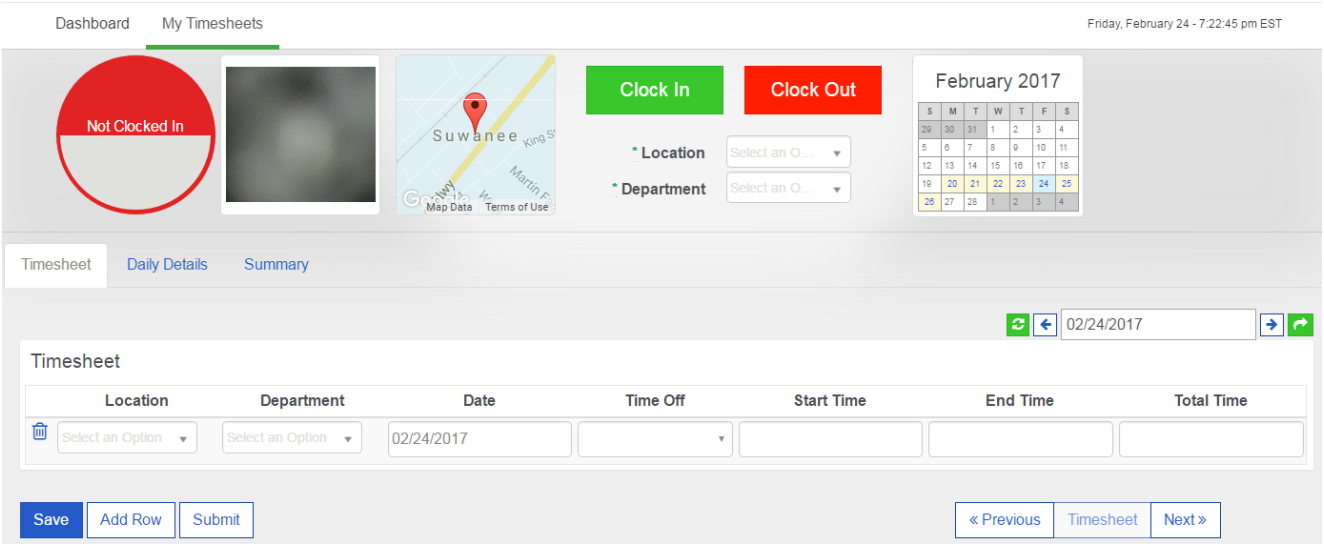
Entering your time on a Timestamp timesheet

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.

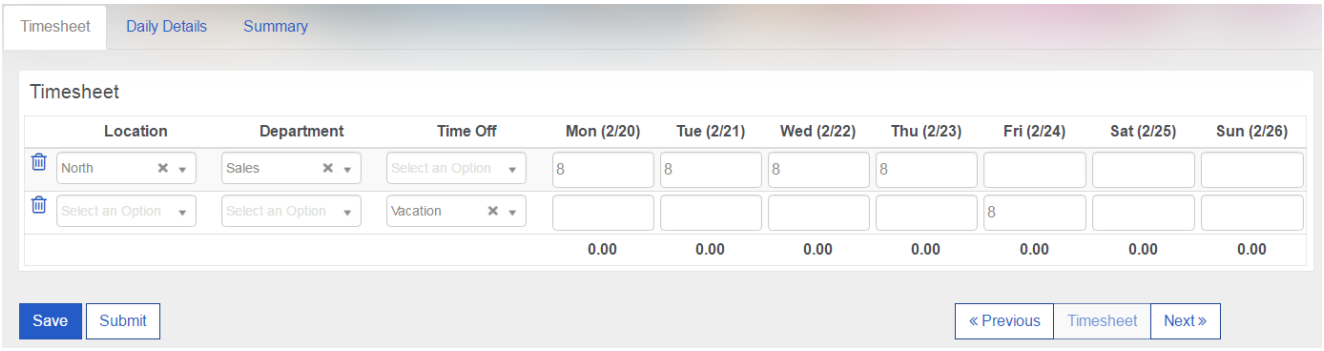
   After your timesheet is submitted, any changes must be made by your manager.



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.

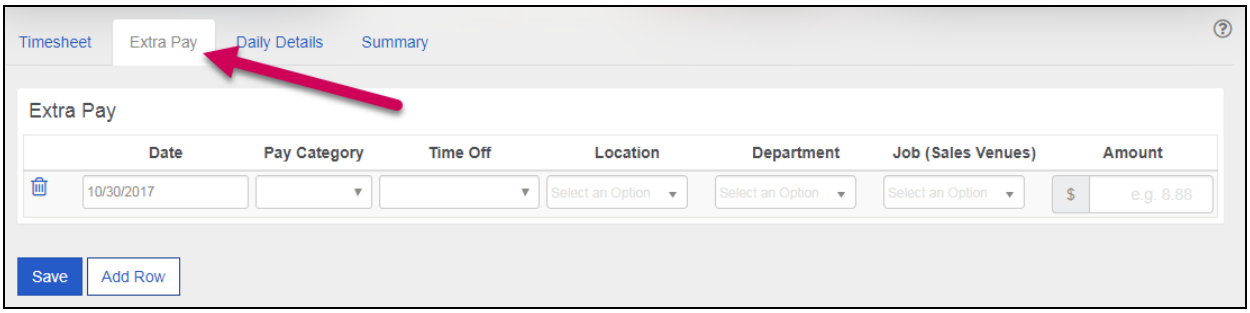
   After your timesheet is submitted, any changes must be made by your manager.



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.



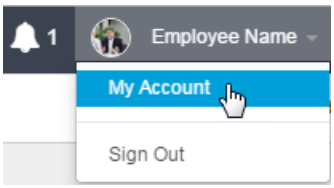
3. Select the **Date** for which you want to enter a dollar amount.
4. If your company has set up associated pay categories, select the **Pay Category** to which this amount should be reported.
5. If applicable, select the time off type and labor allocations (such as location and department).
6. Enter 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.
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.