

PART 4:

# ClickTime Company Settings

Finish Customizing Your ClickTime  
Company Preferences

# ClickTime Basics

Part 1. Getting Started

Part 2. Using the ClickTime Timesheet

Part 3. ClickTime Time Entry Settings

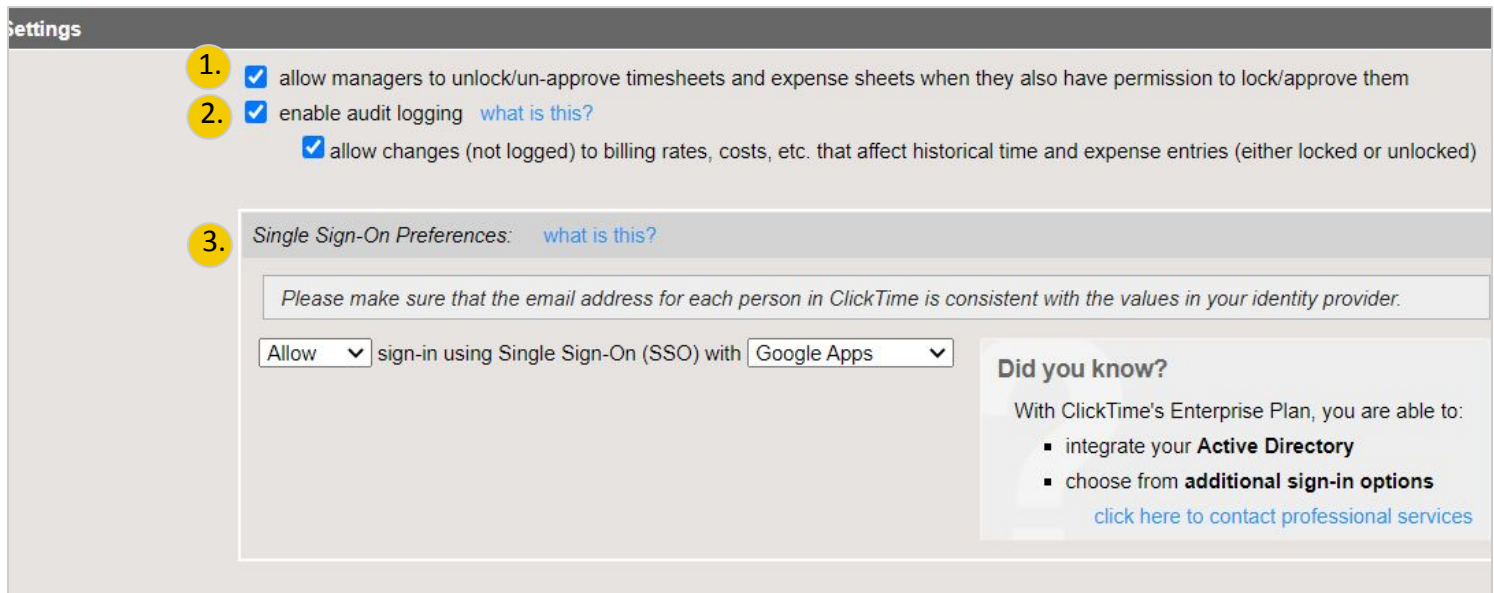
» Part 4. ClickTime Company Settings

- a. Security Settings
- b. Billing Rates & Estimations
- c. Additional Customization

# Security Settings

Control How Your Users Access ClickTime

Now that you've set up your Project, Task, and Leave Type settings, it's time to customize the Security Settings for your account.



The screenshot shows the 'Security Settings' page in ClickTime. It features three numbered sections:

- 1.** A checkbox labeled 'allow managers to unlock/un-approve timesheets and expense sheets when they also have permission to lock/approve them' is checked.
- 2.** A checkbox labeled 'enable audit logging' is checked, with a link 'what is this?' next to it. Below it, another checked checkbox is labeled 'allow changes (not logged) to billing rates, costs, etc. that affect historical time and expense entries (either locked or unlocked)'.
- 3.** A section titled 'Single Sign-On Preferences:' with a link 'what is this?'. Below this is a text box: 'Please make sure that the email address for each person in ClickTime is consistent with the values in your identity provider.' Underneath is a dropdown menu set to 'Allow' and another dropdown menu set to 'sign-in using Single Sign-On (SSO) with Google Apps'.

On the right side of the settings area, there is a 'Did you know?' box containing the text: 'With ClickTime's Enterprise Plan, you are able to:' followed by two bullet points: 'integrate your Active Directory' and 'choose from additional sign-in options'. A link 'click here to contact professional services' is at the bottom of this box.

- 1.** By default, Managers will not have the ability to un-lock or un-approve Timesheets (or Expense Sheets). Check this box if you want to allow your Managers to have this option when they have permission to lock or approve them. This will only apply to the Timesheets and Expense sheets that they can lock or approve.
- 2.** Audit Logging (which is required for DCAA Compliance) allows you to track the time and person who creates or edits any time entries (as well as other Company settings). Demo customers should contact their Account Executive for more details and paying customers can contact [support@clicktime.com](mailto:support@clicktime.com) for pricing.
- 3.** Single Sign-On (or SSO) can expedite the login process. All accounts can integrate with Google Apps and link their Google account to their ClickTime login. Additional SSO options can be discussed with your Account Executive (during the demo period) or by emailing our Support Team.

# Security Settings

Control How Your Users Access ClickTime

**Select the session timeout period for your company:**

Session timeout:

- 30 minutes
- 1 hour
- 2 hours
- 4 hours
- 8 hours
- 12 hours
- 1 day

## Session timeout period

In addition to the login settings, you can also set a session timeout period for all of your employees. ClickTime users who leave ClickTime open for longer than this time period without creating a time entry or going to a new page will be logged out

## Person Defaults

If you'd like to save certain settings to apply to all new users that you create, you can do so in Person Defaults. When a new employee is added to the system, these options will be remembered and applied to that new user. Of course, you can always change one of the settings when creating the new user if it should not apply to them.

**Person Defaults**

These default values are used when adding new people, and can be customized for each person.

time format: AM/PM ▾

time entry selection method: pop-down list ▾

cost rate: 10 \$/hr

Classify time as incomplete when less than 8 hours per Day ▾ have been entered

- The person must enter the start and end time for each time entry [what is this?](#)
- The person must enter notes/comments with each time entry
- Prevent people from submitting incomplete timesheets (a timesheet approver must be designated for this setting to take effect) [what is this?](#)

You can specify their default time format, cost rate, incomplete timesheet rules, and whether start/end times or comments are required.

# Billing Rates and Estimation

ClickTime supports Billing Rates and Estimation Models to fit your organization's needs

The next Billing Rate section will only be visible if you have enabled "time billing features".

Premier and Enterprise plans will likely have access to the "estimation features", if they have activated Insights or Resource Planning.

Preferences

Custom Fields Leave Types Labels Save

General Company Information

\* company name: Your Company  
account number: 55555555  
date setting: month/day/year  
currency: U.S. Dollar - \$ (select the correct symbol or abbreviation)  
\* items per page: 10 (number of items displayed for people list, client list, etc.)  
accounting application: n/a  
payroll application: select one...  
 enable time billing features [what is this?](#)

ClickTime also has a budgeting feature that allows you to budget your project's hours and billings by task. Try the Project Budgeting module free for 30 days. [Request a trial.](#)

[Go to GDPR Compliance Setup](#)

## Billing Rates

Billing Rates and Estimation best practices can vary based on your organization's needs, so those are covered in more detail in our Help Center at <https://support.clicktime.com/hc/en-us/>. However, you should be aware that all ClickTime accounts have access to basic Billing Rates. You will need a Team (or above) plan to utilize the Advanced Billing Rate Options.

▼ Billing Rates

Which of the following best describes your company?

**Rate Structure**

"Our billing rates depend on..."

... which **Person** does the work.

... the **Project**.

... the **Task** or activity performed.

**(Advanced Options)**

... the **Task**, and we make exceptions for certain projects.

... the **Task**, and we make exceptions for certain people.

... the **Person**, and we make exceptions for certain clients.

... the **Person**, and we make exceptions for certain projects.

**Billable vs. Non-Billable**

We refer to **tasks** as billable or non-billable.

Default Rate **tasks**

The default billing rate for **tasks** is:

150 \$ / hr

You can also specify whether Projects or Tasks are considered billable, set a default Rate for all new Projects/Tasks that are created, and update existing time entries in bulk from this section.

More details about the Default Billing Rate [can be found in our Help Center](#).

**Tip:** For more assistance using Billing Rates, demo customers will want to contact their Account Executive or ClickTime Sales. Paying customers can reach out to our Support Team with any questions.

# Customization

ClickTime is highly customizable

## Custom Logo

If you'd like your company logo to appear in all of your ClickTime reports, you can upload it here:

**Customization**

**Report Logo**

Your logo will appear in [report headings](#). JPG, JPEG, PNG, and GIF files up to 2MB are supported.

Enterprise accounts can also add their company's logo to all ClickTime pages by emailing our Support Team.

## Custom Terminology

As mentioned in the first Get Started document, the ClickTime terminology can be customized to meet your needs. If you'd like to change the Client / Project / Task / Division terminology, you can do so here. Either select one of our options from the drop-down, or choose the "other" option and type your own term in.

description	quick-select term	* singular term	* plural term
The primary entity that time is associated with.	<input type="text" value="client"/>	<input type="text" value="client"/>	<input type="text" value="clients"/>
Sub-category of the primary entity.	<input type="text" value="project"/>	<input type="text" value="project"/>	<input type="text" value="projects"/>
Description of the time entered or type of work.	<input type="text" value="other (please specify)"/>	<input type="text" value="custom1"/>	<input type="text" value="custom2"/>
Describes a group of people.	<input type="text" value="division"/>	<input type="text" value="division"/>	<input type="text" value="divisions"/>
	<input type="text" value="activity"/>		
	<input type="text" value="function"/>		
	<input type="text" value="item"/>		
	<input type="text" value="pay code"/>		
	<input type="text" value="service"/>		
	<input type="text" value="task"/>		
	<input type="text" value="work code"/>		
	<input type="text" value="other (please specify)"/>		

# Thank you!

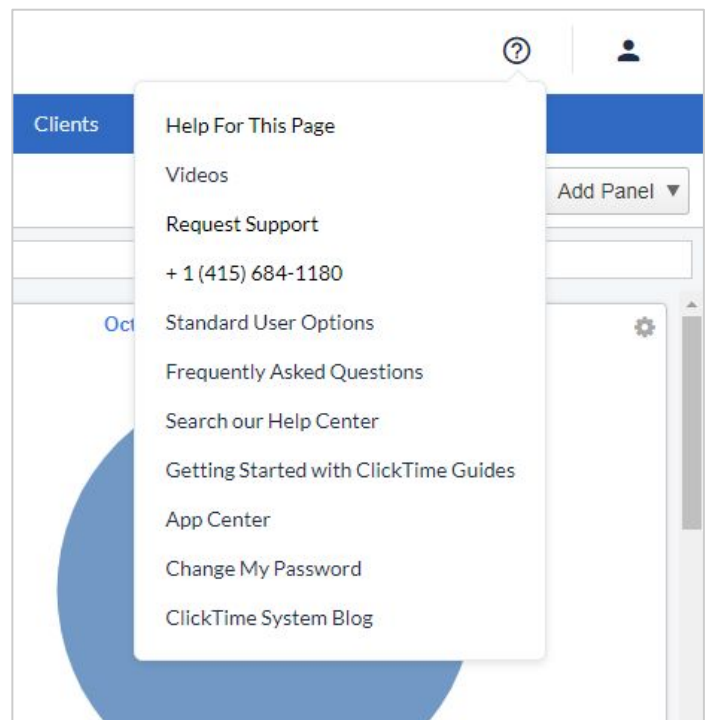
We hope the ClickTime Basics documentation has been helpful for you while you get started. We pride ourselves on our exemplary Customer Service and are here to help you get the most out of ClickTime!

**If you are currently using ClickTime for a trial evaluation, or are interested in a demo**, please reach out to our Sales Team for assistance. If you've already signed up for a trial, you should have also received an email from your personal Account Executive, who you can contact directly during the trial with any questions or feedback.

**If you are a current ClickTime Customer**, you can email our Support team or call +1 (415) 684-1180 (choose option #3 for Support) Monday-Friday, 9am-5pm (Pacific Time) to speak to a Support Representative. Emails are generally answered within a few business hours. Voicemails will be returned as soon as possible during business hours.

Additionally, ClickTime has extensive help documentation that can be accessed whenever you need it by clicking the Help link in the top right corner. This includes:

- Links to the relevant help documentation in your browser
- A direct link to all the ClickTime videos
- A Support form
- Our office number
- Several links to the different sections of our help documentation (including these "Getting Started" Guides)
- Link to change your password
- Link to our System Blog (for scheduled maintenance and technical announcements)



We'd love to hear from you so please be in touch if there's anything we can do to assist!

# Congratulations! You're ready to ClickTime.

Contact us at 415-684-1180 or email  
[sales@clicktime.com](mailto:sales@clicktime.com) (demo accounts)  
[support@clicktime.com](mailto:support@clicktime.com) (current customers)