GETTING STARTED

ADMINISTRATOR'S GUIDE TO SETTING UP TIME IQ

WWW.TIMEIQ.COM

WHO CAN USE THIS FEATURE?

Only **Administrators** can use this feature.

Introduction

Welcome to Time IQ!

If you're an administrator who just created a new Time IQ account or want some help setting one up, this guide was made for you. We'll walk through the initial onboarding items quickly so you can get back to making the most of your day.

Let's get going!

Step 1 – Add Clients & Projects

As an admin, when you first log in to your new Time IQ account, you'll see three Getting Started Tasks in the top nav: Add Clients & Projects, Track Some Time, and Add Team Members.

So you and your team know where the time went, the first Getting Started Task asks you to add some Projects to your account.

1. From the Projects page, click the Add Project button.
2. Choose a Client for the project. You'll start with one client: yourself! To add more clients, click the +New Client button in the top-right and type the client's name in.
3. Name the Project. By default, the name of your first project will be blank.

Step 2 – Track Some Time

To create a new time entry, you have three options:

- **Option 1: Start a new timer**. If you're starting a new project, click the grey Start A New Timer button to start the clock. The timer will keep running until you stop it (even if you close your browser), so remember to stop the timer when you're all done working.
- **Option 2: Add a new entry**. If you've just completed a project, click the green Add A New Entry button. Please note:
  - If you have Duration-Based Tracking enabled, you'll enter how many hours and minutes you worked. Visit your Settings page to enable this mode.
  - If you have Start and End Time Tracking enabled, you'll be asked to enter what time you started working and when you stopped. This mode automatically calculates the hours and minutes you worked. Visit your Settings page to enable this mode.

- **Option 3: Clock in (optional).** If you have the Time Clock Tracking style enabled, users will only be able to punch in and punch out. Users also won't be able to edit time entries. If users have an issue with a Time Clock entry, they will need to contact you or one of your other admins for help.

! No matter which time tracking mode you choose, consider asking other users to add Notes to each time entry. It only takes a few seconds, and it can prove invaluable later on when you're trying to remember the details of the work you completed.

Step 3 – Add Team Members

You can give other teammates access to your company's Time IQ account so they can start tracking their time too.

1. From the People page, click the Add Person button.
2. When the Add Person dialog box pops open, enter the new user's first name, last name, and email address. You'll also choose a User Level, which will determine what actions the new user can take in your account. The User Levels are:
   - Admin, full access to all features and settings.
   - Manager, can view reports and manage assigned projects and people.
   - Standard, can only log time and view reports for their own entries.
3. Click Next when you're all done, and the new user will receive an email with a link to activate their Time IQ account.

Email addresses are not required for every user, but no-email users can't be Admins and won't receive email notifications of any type. If a no-email user needs to recover their password, they will have to contact one of your account's Admins for help.

Next Steps

Congratulations on getting this far! Your account should be set up and ready for daily use. When you're ready, you might want to:

- Review settings in the app. Visit the Help Center for more info.
- Configure email notifications in the app. Visit the Help Center for more info.
- Install Time IQ on your smartphone (iOS or Android).