

New Employee Checklist

When adding new employees to DOVICO Track-IT Suite, use this checklist to ensure that everything is ready for your new staff members to enter their time and expenses.

- Check for **available licenses** to make sure you have enough licenses to use for the new employee(s). Select **Help, About Track-IT pro** from the menu to find out how many licenses have been purchased and how many are used.

- Add the new employee.** Take note of the employee's User ID and Password.

- Make certain to select "Track-IT timesheet entry tools" in the **Employee Uses** box and that the person has at least the "Timesheet entry tools" **security level**. This will ensure that the employee can enter time and expenses.

- If cost reporting is used, apply the proper **Rate of Wages** (Pay rate) and **Rate Charged** (Billing Rate) to the employee.

- From the **Advanced tab**;
 - o Set applicable **Approval Workflows** for time and expenses.
 - o Select a **Leave/Absences** rule and adjust the Accrual Start date if necessary.

- Assign projects and tasks** for the new employee.

- Review **Assignment Budgets** (Project Budgets) for the new employee and make any required modifications.

- Add the new employee to any applicable **Matrix Approval** workflows for each project.

- Add the employee to relevant **scheduled reporting or notification** jobs (Track-IT pro Assistant).

- For Track-IT light users, install the Track-IT light application on the employee's computer. For Track-IT web edition users, send the URL or path to login.

- Send the new employee, his/her User ID and Password.

- Train** the employee how to use Track IT light/Track-IT web edition to enter time and expenses (or use our On Demand Training). www.dovico.com/client.html

United States

2020 Pennsylvania Ave NW | Unit 459
Washington DC | 20006 USA
TEL 1-800-618-8463
FAX 1-506-384-0727

Europe

1 Silk House | Park Green | Suite #104
Macclesfield | Cheshire UK SK11 7QJ
TEL +800 4618 8463
FAX +44 (0) 1625 429888

Head Office

PO Box 27058
Dieppe NB | CA E1A 6V3
TEL 1-506-855-4477
FAX 1-506-384-0727
info@dovico.com