

Hours at Work

Admin Manual

Workspace setup, daily operations, and audit-readiness

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Introduction

You're the workspace admin. That probably means you wear several hats already — executive director, operations director, finance lead, HR — and you've inherited Hours at Work along with everything else.

This manual walks you through the work the admin role actually does: getting your workspace approved, setting it up once, keeping it healthy week to week, and unsticking the small things that come up. Every step explains *why* it matters, not just where to click, so you can answer questions when staff ask.

Terms used in this manual

A quick orientation on the words you'll see throughout.

- **Workspace** — your organization's space in Hours at Work. One nonprofit, one URL, one set of charge codes, one set of people.
- **Workspace request** — the moderated signup entity a brand-new organization creates at hoursatwork.com/signup. States are `awaiting_verify`, `under review`, `approved`, and `not approved`.
- **Charge code** — anything staff log hours to. Three kinds: Admin, Grant, Leave.
- **Pay period** — a biweekly or semi-monthly window. Either `OPEN` or `CLOSED`.
- **Timesheet** — one staff member's hours for one work week. States are `DRAFT`, `SUBMITTED`, `APPROVED`, `REJECTED`, and `LOCKED`.
- **Role** — every person is one of Staff, Approver, or Admin.
- **Access** — an optional add-on on top of a role: Fiscal Analyst or HR Analyst.
- **Fallback queue** — the safety net for timesheets submitted by staff without an active Approver assignment. Admins can always sign; HR Analysts sign by default; Fiscal Analysts sign if the workspace opts in.
- **Bulk import** — the CSV-based flow for creating many staff at once, with per-row preview, temporary passwords, and a 24-hour rollback window.
- **Signed PDF** — the audit PDF for one approved staff-week. Also produced for `LOCKED` timesheets that were `APPROVED` before the lock; carries a **Signed via fallback queue** badge when the signer used the fallback queue.

Stick with these terms as you go. They're the same ones your staff, approvers, and funders will see in the product.

A note about dates. Dates in the on-screen UI now read in medium format — for example, Jul 6, 2026. Dates in CSV downloads and PDF exports stay in ISO format — 2026-07-06 — because payroll parsers and audit systems depend on that shape. Both formats represent the same date; the choice is deliberate.

Getting started

You'll do most of these once, in roughly this order. Plan for an afternoon for first-time setup if you're coming from a spreadsheet.

1. Sign in to your workspace

If this is your very first sign-in, the sequence looks like this. After you submitted the workspace request at hoursatwork.com/signup and verified your email, Hours at Work reviewed your request. Once approved, you got a **Your workspace is ready** email with a sign-in link to your-org.hoursatwork.com. Follow the link, enter your email, and because this is your first login you land on the reset page at </staff/timesheets/account/reset-password/> to set your permanent password (12-character minimum).

For subsequent logins, open your welcome email or bookmark and follow the link to your-org.hoursatwork.com. Enter your email and password, then click **Log in**.

The screenshot shows the 'Set your new password' page within the Hours at Work application. At the top, there's a navigation bar with 'Hours at Work' on the left, 'Timesheet' in the center, and a user profile dropdown for 'Taylor Reset' on the right. The main content area is a white box with a light gray border. It has the title 'Set your new password' and a welcome message: 'Welcome to Reed Health Partners. Set a password to access your timesheet.' Below this are two input fields: 'New password' and 'Confirm new password'. A note between the fields states: 'At least 12 characters. Avoid your email address or username.' At the bottom of the form is a blue button labeled 'Set password and continue'. The footer of the page contains 'Hours at Work' on the left, links for 'Timesheets', 'My account', and 'Support' in the center, and a copyright notice '© 2026 Hours at Work HQ' on the right.

Why this matters. Every workspace lives on its own URL. If you land on the generic hoursatwork.com sign-in by accident, the system won't know which workspace you mean. The reset page routes first-login flows through the HAW-owned interface, so what you see matches what your staff will see when you bulk-import them.

What you'll see. Your timesheet for the current work week. Even as an admin, you have a timesheet — admins are real people with hours to log, just like everyone else.

If your workspace request was rejected, the rejection email carries the reason so you know what to do next. See the Getting started guide on the website for the full request flow.

2. Open Settings

Click your name in the top-right of any page, then pick **Settings** from the dropdown.

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TimesheetApprovalsReportsTest User

WEEK OF JUN 22, 2026 THROUGH JUN 28, 2026

My timesheet

0.0h

DRAFT

No hours logged yet. · 0 charge codes this week · locked

< Prev

This week

Next >

Copy from last week

Save draft

Submit timesheet

Download signed PDF

Loaded.

How this works: Click a day to add a charge code, type your hours, and Save draft anytime. When the week looks right, hit Submit timesheet to send it to your approver.

Compact week

Day - by - day

Planner

This week is in a closed pay period. Contact your admin if it needs to reopen.

Charge code	Mon 6/22	Tue 6/23	Wed 6/24	Thu 6/25	Fri 6/26	Sat 6/27	Sun 6/28	Row total
No charge codes yet. Use "Add charge code" below to start logging hours.								
Day totals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

You'll land on the Settings overview. Everything an admin can configure is grouped into three categories:

- **TIME & MONEY** — Workspace, Charge codes, Pay periods, Pay categories.
- **PEOPLE** — People, User profiles, Approver assignments, Departments.
- **OPERATIONS** — Period locking, Billing.

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WORKSPACE

Settings

Administrative tasks. Each section corresponds to one data domain.

TIME & MONEY

Workspace

Timezone and other workspace-level preferences.

Charge codes

Grants, leave types, and admin codes that staff allocate hours to.

Pay periods

Seed and close biweekly or semi-monthly pay periods.

Pay categories

Payroll codes (REG, OT, HOL) used in HR exports.

PEOPLE

People

Invite teammates, change roles, and remove access. Bulk - invite via CSV.

User profiles

Per-user HR fields used in payroll exports.

Approver assignments

Map each staff member to one approver, with effective dates.

OPERATIONS

Period locking

Lock all timesheets on or before a chosen cutoff date.

Billing

Subscription status, payment method, and plan details.

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TimesheetsMy accountSupport

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Why this matters. The Settings link is your home base for every admin task in this manual. If you ever feel lost, come back here.

3. Set your workspace basics

Open **Settings** → **Workspace**. Three things to set:

- **Timezone.** Pick the timezone your organization runs on (for example, America/New_York). Every timesheet entry is stamped in this timezone from here forward.
- **Submission deadline.** The number of business days after a pay period ends by which staff must submit. Saturdays and Sundays are skipped automatically. This only applies to future pay periods.
- **First day of work week.** Pick Sunday (Sun–Sat) or Monday (Mon–Sun).

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Workspace

Workspace-wide preferences. The timezone you pick here drives reminder timing, payroll-readiness "today" math, and how all in-app timestamps are displayed.

Timezone

Times in invites, reminders, the History card, and pay-period boundaries use this setting.

Workspace timezone

New York

Currently America/New_York. Saves take effect immediately for new entries; existing audit rows are reformatted.

Save timezone

Submission deadline

How many business days after a pay period ends do staff have to submit their timesheet before it counts as late? Range 0–14. Default 2.

Business days after period end *

2

Saturdays and Sundays are skipped. Changes apply to future pay periods only — historical periods keep whatever deadline they already had.

Save deadline

Work week

Which day starts your work week. Drives the timesheet grid column order, the report "This week" / "Last week" buttons, and the day approver + payroll digest emails fire on. Pick the day that matches how you run payroll.

First day of work week

Monday (Mon–Sun)

Heads-up: flipping this mid-week creates a new empty timesheet for the new week boundary. Any in-progress drafts at the OLD boundary remain accessible via their original URL (Prev / Next buttons walk through them) but won't appear when you click "This week". The cleanest time to change this setting is before any unsubmitted draft exists — typically the same day as a flip would affect, before staff start logging hours.

Save work week

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Why this matters. These three settings shape every timesheet, every report, and every funder PDF your workspace will ever produce. Get them right at the start and you won't have to fix them later.

About changing work week mid-stream. Flipping the first day of the work week creates a fresh empty timesheet at the new boundary. Any in-progress drafts at the old boundary stay accessible by their original URL — the ◀ **Prev** and

Next > buttons walk through them — but they won't appear when staff click **This week**. If you can, change this setting before staff start logging hours for the affected week.

What you'll see. Each field saves immediately when you change it. There's no separate Save button for workspace settings.

4. Set up departments (optional)

Open **Settings** → **Departments**. If your nonprofit groups staff into divisions — Programs, Clinical, Operations, Development — add each one here.

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Departments

Organizational units that group staff in HR reports. Soft-deleted departments are preserved for historical reports.

How departments are used

- Invite + manage staff:** The Department field on the Invite teammate form and the Settings → User profiles editor becomes a dropdown of the departments you create here.
- Weekly reconciliation:** Staff are grouped under a department subtotal row ("Human Resources subtotal", "Operations · 3 staff", etc.) for cross-department variance reading.
- 40h Threshold + Compliance Gaps:** Each row shows the staff member's department so an HR analyst can spot patterns by team.
- HR Export:** The Department value is one of the columns in the exported CSV, so payroll systems can pivot or filter by department downstream.

Soft-deleting a department here removes it from the dropdown going forward; staff already tagged with that department keep their existing value (so historical reports still group correctly).

Add Department

Name *

How the department appears in the Invite teammate dropdown and in HR reports.

Save

☒ Active

Inactive departments stay assigned on existing staff but are hidden from new picks.

Existing departments

	NAME	ACTIVE	ACTIONS
::	↑ ↓ Administrative Services	yes	Edit Delete
::	↑ ↓ Clinical	yes	Edit Delete
::	↑ ↓ Engineering & Product Dev	yes	Edit Delete
::	↑ ↓ Finance & Accounting	no	Edit Delete
::	↑ ↓ Human Resources	yes	Edit Delete
::	↑ ↓ Operations	yes	Edit Delete
::	↑ ↓ Programs	yes	Edit Delete
::	↑ ↓ Quality Assurance	yes	Edit Delete

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Why this matters. Departments are an optional grouping you can attach to each staff member's User profile. Reports — Weekly Reconciliation, Funding Reconciliation, 40h Threshold — let your analysts filter by Department. Skip this step if everyone's in one bucket; come back when your team grows.

5. Seed your first pay periods

Open **Settings** → **Pay periods**. In the **Seed periods forward** section at the top:

- **Cadence.** Pick Biweekly or Semi-monthly. Biweekly is every other Monday. Semi-monthly is the 1st and 16th of each month.
- **Anchor date.** For biweekly, pick any Monday that anchors your schedule. For semi-monthly, pick the 1st of any month.
- **Number of periods.** Twelve is the default — about six months of biweekly periods or six months of semi-monthly.

Click **Seed periods**.

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TIME & MONEY

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Seed and close biweekly or semi-monthly periods. Closing a period locks its timesheets for payroll.

Seed periods forward

Cadence

Biweekly

Anchor date *

mm/dd/yyyy

Monday for biweekly, 1st of month for semi-monthly.

Number of periods *

12

Seed periods

Pay periods

LABEL	START	END	CADENCE	FISCAL YEAR	STATUS	ACTIONS
2026-P04	Aug 3, 2026	Aug 16, 2026		2026	OPEN	CloseEditDelete
2026-P03	Jul 20, 2026	Aug 2, 2026		2026	OPEN	CloseEditDelete
2026-P02	Jul 6, 2026	Jul 19, 2026		2026	OPEN	CloseEditDelete
2026-P01	Jun 22, 2026	Jul 5, 2026		2026	OPEN	CloseEditDelete

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Why this matters. Staff can only log hours and submit timesheets against a pay period that exists. If you don't seed periods, the staff grid tells them "no period exists for this week" — a great way to lose a Friday afternoon to confused emails.

6. Confirm your pay categories

Open **Settings** → **Pay categories**. You'll find a starter list: REG (regular), OT (overtime), HOL (holiday), VAC (vacation), SCK (sick), and a couple of optional codes like DIFF (shift differential) and CALL (on-call).

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Codes used in payroll exports (REG, OT, HOL, etc.). Renaming a code can break payroll imports — proceed with care.

Add Pay category

Code (uppercase, e.g. REG / OT) *

Name *

☒ Active

Inactive categories stay in old timesheets but are hidden from new entries.

Renaming a code AFTER snapshots exist can desynchronize payroll imports — proceed with care.

Human label shown in the staff grid.

Save

Existing pay categories

	CODE	NAME	ACTIVE	ACTIONS	
::	↑ ↓	REG	Regular	yes	Edit Delete
::	↑ ↓	OT	Overtime	yes	Edit Delete
::	↑ ↓	HOL	Holiday	yes	Edit Delete
::	↑ ↓	VAC	Vacation	yes	Edit Delete
::	↑ ↓	SCK	Sick	yes	Edit Delete
::	↑ ↓	DIFF	Shift Differential	yes	Edit Delete
::	↑ ↓	CALL	On - Call	yes	Edit Delete

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Support

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Why this matters. Pay categories are payroll codes. They classify hours for your HR Analyst's payroll-ready export. They're different from charge codes (which describe *what* the work was for). Most workspaces never need to touch this list.

7. Build your charge code list

Open **Settings** → **Charge codes**. This is where you tell Hours at Work what your staff actually work on.

In the **Add charge code** form at the top:

- **Name.** What staff see in their weekly grid. Write it the way you'd say it out loud ("HRSA Maternal Health 2025", "PTO").
- **Code.** A short identifier for HR exports (`HRSA-MAT-25` , `PTO`). Keep these consistent.
- **Kind.** Pick one:
 - **Admin** for unbillable internal time (staff meetings, admin work).
 - **Grant** for funder-billable work. This unlocks the Funder fields.
 - **Leave** for PTO, sick, holiday, bereavement.
- **Funder** (*Grant only*) — the granting organization (HRSA, CDC, Kellogg Foundation).
- **Funder type** (*Grant only*) — Federal, State, Foundation, Local, Internal, or Other. Drives the breakdown on funder reports.
- **Leave subtype** (*Leave only*) — PTO/Vacation, Sick, Holiday, Bereavement, or Other.
- **Active.** Leave it checked. Unchecking hides the code from the staff grid but preserves history.

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Grants, leave, and admin codes that staff allocate hours to. Soft-deleted charge codes are preserved for historical reports.

Add charge code

Name *

Code

Kind *

Admin

Funder

How staff see this charge code in the weekly grid.

Short identifier shown in HR exports (e.g. CDC-2024).

Admin = unbillable internal time. Grant = billable. Leave = PTO/sick/holiday.

Name of the granting organization, if any.

Funder type

Active

Unchecking hides this from the grid but preserves history.

Drives the breakdown on funder reports.

Save

Existing charge codes

ADMIN

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Charge codes

Grants, leave, and admin codes that staff allocate hours to. Soft-deleted charge codes are preserved for historical reports.

Add charge code

Name *

Code

Kind *

Admin

Funder

How staff see this charge code in the weekly grid.

Short identifier shown in HR exports (e.g. CDC-2024).

Admin = unbillable internal time. Grant = billable. Leave = PTO/sick/holiday.

Name of the granting organization, if any.

Funder type

☒ Active

Unchecking hides this from the grid but preserves history.

Drives the breakdown on funder reports.

Save

Existing charge codes

ADMIN

	NAME	FUNDER	FUNDER TYPE	ACTIVE	ACTIONS
	General Administration ADMIN-GEN		Other	ACTIVE	Edit Delete
	Fundraising FUNDRAISE		Other	ACTIVE	Edit Delete
	Training & Professional Dev TRAINING		Other	ACTIVE	Edit Delete
	General Fund		Other	ACTIVE	Edit Delete

GRANT

	NAME	FUNDER	FUNDER TYPE	ACTIVE	ACTIONS
	New Grant	CDC	Federal	ACTIVE	Edit Delete
	HRSA - 330 Health Center Program HRSA-330	HRSA	Federal	ACTIVE	Edit Delete
	HRSA Ryan White Part A RHAP-A	HRSA	Federal	ACTIVE	Edit Delete
	HRSA Ryan White Part C RHAP-C	HRSA	Federal	ACTIVE	Edit Delete
	CDC - 1815 Public Health Workforce CDC-1815	CDC	Federal	ACTIVE	Edit Delete
	CDC - 2200 Health Equity CDC-2200	CDC	Federal	ACTIVE	Edit Delete
	SAMHSA Suicide Prevention SAMHSA-SP	SAMHSA	Federal	ACTIVE	Edit Delete
	State DPH Maternal Health STATE-MH	State DPH	State	ACTIVE	Edit Delete
	State DPH Tobacco Control STATE-TC	State DPH	State	ACTIVE	Edit Delete
	County Outreach Initiative CNTY-OUT	County	Local	ACTIVE	Edit Delete
	United Way Community Programs UW-CP	United Way	Foundation	ACTIVE	Edit Delete
	Kellogg Foundation Youth KELLOGG-Y	Kellogg	Foundation	ACTIVE	Edit Delete
	Robert Wood Johnson Equity RWJF-EQ	RWJF	Foundation	ACTIVE	Edit Delete
	Private Donor Restricted PRIV-RES	Private	Other	ACTIVE	Edit Delete
	Medicaid Reimbursable Services MCD-REIMB	Medicaid	State	ACTIVE	Edit Delete
	Title X Family Planning TITLE-X	HRSA	Federal	ACTIVE	Edit Delete

LEAVE

	NAME	FUNDER	FUNDER TYPE	ACTIVE	ACTIONS
	Vacation PTO-VAC		Other	ACTIVE	Edit Delete
	Sick Leave PTO-SICK		Other	ACTIVE	Edit Delete
	Holiday				

PTO-HOL	Other	• ACTIVE	Edit	Delete
Bereavement PTO-BRV	Other	• ACTIVE	Edit	Delete
Paid Time Off	Other	• ACTIVE	Edit	Delete
Holiday	Other	• ACTIVE	Edit	Delete
Sick Leave	Other	• ACTIVE	Edit	Delete

Why this matters. The charge code list is the spine of everything else. Staff allocate hours to charge codes.

Approvers approve hours against charge codes. Fiscal Analysts pull funder reports by Funder + Funder type. Get the Funder and Funder type fields right when you create a Grant code — they're what makes audit-ready funder reports work later.

What staff see before you're done. If you invite a staff member before you've assigned them any charge codes, they see an empty timesheet with the message *"Your admin hasn't assigned any charge codes to you yet. Ask your admin to set up an approver assignment and a funding split so you can start logging hours."* The Add-a-charge-code combobox is hidden until you finish their approver assignment and funding split. This is intentional — it cuts the "why can't I log hours" tickets in half.

8. Invite your team

Open **Settings** → **People**. Two ways to invite:

Invite one at a time. In the **Invite a teammate** form, type an email, pick a role (Staff, Approver, or Admin), optionally set a display name and a note, and click **Send invite**. The invitee gets an email with an accept link that takes them to a page where they set a password. Use this path when you're adding one or two people.

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People

Invite teammates, change roles, and remove access. Removed users lose access immediately but their historical timesheets stay intact for audit.

Invite a teammate

Email address *

Role *

Display name (optional)

Staff — Logs their own hours.

Pre-fills the accept form. They can change it.

Note for the invite email (optional)

- Additional info (optional) — pre-fill HR profile
- Reporting access (optional) — grant analyst roles on accept

Send invitation

Bulk invite from CSV

Required columns: email and role (staff / approver / admin). Optional: display_name, employee_number, department, position_title, cost_center, fte, hire_date — populate to pre-fill the invitee's HR profile on accept. Add hr_analyst, fiscal_analyst / fiscal_manager columns (truthy values like 1, yes) to grant analyst access on accept. Max 100 rows per upload.

Download CSV template

CSV file

Choose File No file chosen

Parsed in your browser before anything is sent.

Send invitations

Pending invitations

No pending invitations.

History

Recent changes on this workspace, newest first. Capped at 50 entries.

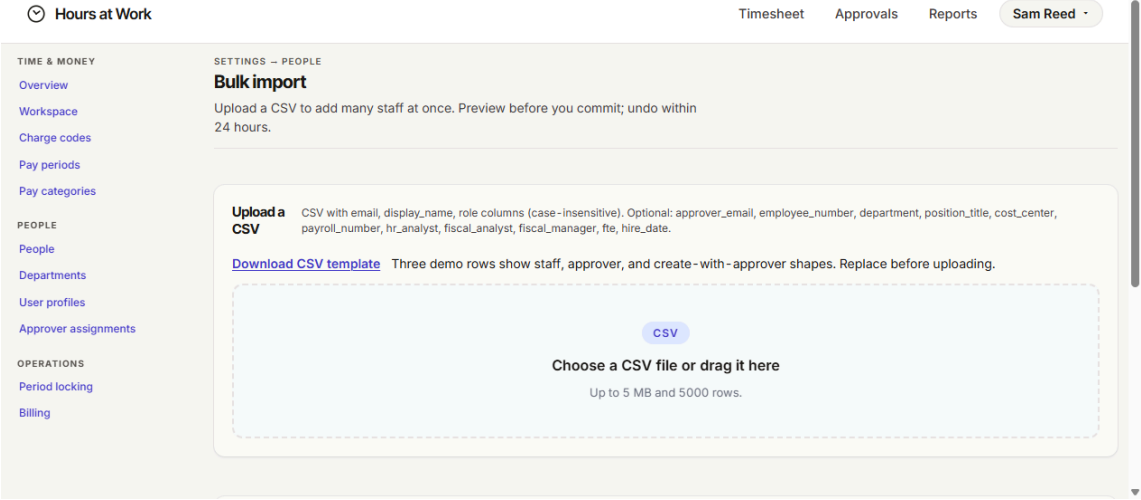
WHEN	WHO	ACTION	DETAILS
Jul 02, 2026, 02:16 PM	Sam Reed	bulk_import_completed	bundle_id: 71f75e5f-8502-450a-8b59-d062202206c2 · created: 1 · attached
Jul 02, 2026, 02:16 PM	Sam Reed	bulk_import_approver_mapped	bundle_id: 71f75e5f-8502-450a-8b59-d062202206c2 · approver_user_id: 43
Jul 02, 2026, 02:16 PM	Sam Reed	bulk_import_user_created	bundle_id: 71f75e5f-8502-450a-8b59-d062202206c2 · Email: test1@marcus
Jul 02, 2026, 02:16 PM	Sam Reed	bulk_import_started	bundle_id: 71f75e5f-8502-450a-8b59-d062202206c2 · total_rows: 1
Jul 02, 2026, 06:39 AM	Sam Reed	bulk_import_rolled_back	bundle_id: 0070fc30-94e4-4a28-9b9f-1349212d6c60 · rolled_back_bundle:
Jul 02, 2026, 06:39 AM	Sam Reed	bulk_import_user_removed	bundle_id: 0070fc30-94e4-4a28-9b9f-1349212d6c60 · rolled_back_bundle:
Jul 02, 2026, 06:39 AM	Sam Reed	bulk_import_rollback_signature_orphan_risk	bundle_id: 0070fc30-94e4-4a28-9b9f-1349212d6c60 · rolled_back_bundle:
Jul 02, 2026, 06:39 AM	Sam Reed	bulk_import_approver_unmapped	bundle_id: 0070fc30-94e4-4a28-9b9f-1349212d6c60 · rolled_back_bundle:
Jul 02, 2026, 06:38 AM	Sam Reed	timesheet_rejected_for_rollback	timesheet_id: 2 · prior_status: approved · new_status: rejected · reason: Imported
Jul 02, 2026, 06:09 AM	Sam Reed	bulk_import_completed	bundle_id: e665e799-fc7d-423c-844c-b0766be4d83e · created: 1 · attached
Jul 02, 2026, 06:09 AM	Sam Reed	bulk_import_approver_mapped	bundle_id: e665e799-fc7d-423c-844c-b0766be4d83e · approver_user_id: 43
Jul 02, 2026, 06:09 AM	Sam Reed	bulk_import_user_created	bundle_id: e665e799-fc7d-423c-844c-b0766be4d83e · Email: test1@marcus
Jul 02, 2026, 06:09 AM	Sam Reed	bulk_import_started	bundle_id: e665e799-fc7d-423c-844c-b0766be4d83e · total_rows: 1

Bulk import

Upload a CSV to add many staff at once. Preview before you commit; undo within 24 hours.

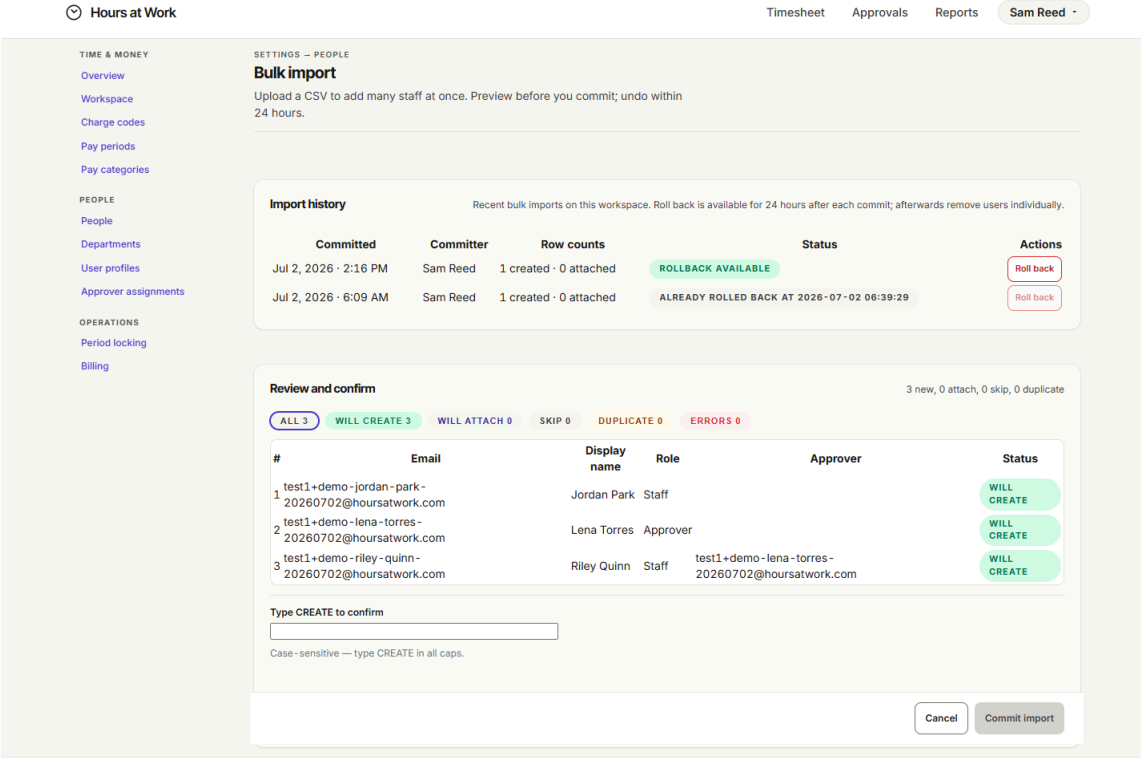
Upload CSV

Bulk import from CSV. For anything larger than a handful of people, scroll to the **Bulk import** card and click **Open bulk import**. You land on the dedicated bulk import page at `/staff/timesheets/settings/people/bulk-import/`.



Click **Download template** to grab the CSV template. It has the columns Hours at Work expects: email, display_name, role, approver_email, department. Fill in your rows — up to 5,000 per import — and save the file.

Click **Upload CSV**, pick your file, and Hours at Work runs a preview. Every row gets a status badge: **Will create** (new user), **Will attach** (existing platform user, will be attached to this workspace), **Skip** (already in the workspace), **Duplicate** (same email twice in your CSV), **Invalid** (bad email or unknown role), **Approver not found** (approver_email isn't in this workspace). Filter chips above the table let you see one state at a time. Fix issues in the CSV and re-upload, or leave them to be skipped. When the preview looks right, click **Commit import**.



After commit, the post-commit summary lists every user that was created or attached. For each newly-created user, the summary shows a temporary password — **masked by default**. Click **Reveal** on any row to show that user's temp password, or **Reveal all** to unmask the column. Each row has a **Copy** button, and **Download temp passwords as CSV** exports the full set.

Billing

Jul 2, 2026 · 6:09 AM

Sam Reed

1 created · 0 attached

ALREADY ROLLED BACK AT 2026-07-02 06:39:29

Roll back

Import complete

Created 2 · attached 0 · approver maps 0. Rollback window: 24 hours.

This list will not be shown again. Download the CSV or copy each temp password before navigating away. Admins cannot re-issue these passwords from this screen — if you lose this list, each affected user must reset their password from the sign-in page.

Download as CSV

CSV is generated in your browser and never sent to the server.

Email	Display name	Temp password	Status
test1+demo-alex-summary-20260702@hoursatwork.com	Alex Summary	 Reveal	Created Copy
test1+demo-blake-summary-20260702@hoursatwork.com	Blake Summary	 Reveal	Created Copy

Return to People

Roll back this import

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TimesheetsMy accountSupport

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Temp passwords are one-time credentials that expire after 7 days. Distribute them out of band and let staff know they'll be prompted to set a real password the first time they sign in — the same reset page you used yourself.

If the **Bulk import** card isn't visible, your network admin hasn't turned the feature on for this workspace. Contact Hours at Work support to enable it.

Why this matters. Every person who logs hours needs an account. Bulk import gives you a preview before commit, a 24-hour rollback window after, and audit history forever.

9. Map staff to approvers

Open **Settings** → **Approver assignments**.

In the **Assign approver** form, pick a staff member, pick an approver, and set an effective-from date (defaults to today). Save.

Hours at Work

TimesheetApprovalsReportsSam Reed

TIME & MONEY

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Approver assignments

Map each staff member to one approver, with effective dates. Reassignment closes the prior row and inserts a new one — history is preserved.

Assign approver

Staff member *

Type a name or email...

Start typing a name or email.

Approver *

Type a name or email...

Start typing a name or email.

Effective from *

mm/dd/yyyy

Assign

Current assignments

STAFF	APPROVER	EFFECTIVE FROM	EFFECTIVE TO	
Marcus Reverify	Sam Reed	Jun 15, 2026	—	Delete

Delegations

Cover an approver's queue for a date range — useful for vacations. The delegate gains approval rights for the originator's assignees while the window is active.

From (approver going out) *

Sam Reed (test1+sam-reed-li)

Defaults to you. Admins can pick anyone.

To (delegate) *

Type a name or email...

Whoever covers the queue.

Starts *

mm/dd/yyyy

Ends *

mm/dd/yyyy

Reason (optional)

PTO Aug 5–15

Delegate queue

Queues you delegated

You haven't delegated any queues.

Queues delegated to you

No one has delegated their queue to you.

Why this matters. Approver assignments are how each staff member's timesheets find their way to the right person for signing.

What if you miss one? A missing assignment no longer silently blocks the staff member. Since v2.89.0 their timesheet still submits — it routes to the fallback queue, where an Admin (or an HR Analyst, or a Fiscal Analyst if you've opted in) signs it. The gap is still a real gap: the Compliance Gaps report flags it as `no_approver_today` until you fix the assignment here. Each row in Current assignments has a **Delete** button — use it when an assignment was created by mistake.

10. Grant analyst access (if applicable)

If you have a fiscal analyst or HR analyst on staff, they need an Access add-on on top of their base role.

Open **Settings** → **User profiles**. Find the person, click **Edit**. In the **Role & access** section:

- HR Analyst** — Unlocks Payroll Readiness, HR Export, Late Submissions, 40h Threshold, Weekly Reconciliation, Unfinished, Pending Approvals, and Compliance Gaps. Signs fallback-queue timesheets by

default.

- **Fiscal Analyst** — Unlocks Funding Reconciliation, Charge-code Effort, and Staff Effort. Fallback-queue signing is off by default and workspace-configurable.
- **Fiscal Manager** (*UI label variant*) — In some builds, the checkbox reads "Fiscal Manager" and is described as "Fiscal Analyst access plus charge-code editing." Treat it as Fiscal Analyst plus edit rights.

Edit staff member — Marcus Reverify

Role & access

Primary role: **Staff — Logs their own** ▾

Additional access

- ☐ **HR Analyst**
Reads Payroll Readiness + HR export.
- ☐ **Fiscal Analyst**
Reads grant + fund reports.
- ☐ **Fiscal Manager**
Fiscal Analyst access plus charge-code editing.

HR profile [Open Timeline →](#)

Employee #	Position	Department
EMP-MR02	Analyst	Programs
Cost center	Status	FTE
—	active	1
Hire date	Termination	Supervisor
2026-06-15	—	—

Approver assignment

Current approver: Sam Reed (test1+sam-reed-item4-20260702@hoursatwork.com) Effective from: Jun 15, 2026

[Change approver](#)

[Cancel](#) [Save changes](#)

Why this matters. Access add-ons layer on top of the base role. If you plan to let this analyst sign fallback-queue timesheets, also check the **Orphan timesheet routing** card on Settings → Workspace (next step).

11. Configure fallback routing (optional)

Open **Settings** → **Workspace** and scroll to the **Orphan timesheet routing** card. This is where you decide which roles can sign fallback-queue timesheets.

- **Admins** — always eligible. Not a toggle.
- **HR Analysts** — eligible by default. Uncheck to remove them.
- **Fiscal Analysts** — off by default. Check to allow.

Why this matters. The fallback queue exists so no submission is ever lost to a missing assignment. Admins and HR Analysts are the safe defaults; Fiscal Analysts are opt-in because their day-to-day is fund-side reporting rather than people management.

What ends up on the audit file. Fallback-signed timesheets produce a Signed PDF with a small **Signed via fallback queue** badge and the signer's role. Funders and auditors treat it identically to a regular approver signature — the badge just makes the provenance clear.

12. Rolling back a bulk import

Every import you commit shows up in **Bulk import history** with a Rollback button that's live for 24 hours.

- **Standard rollback** — Detaches users the import created from your workspace and reverses attachments. Users attached to no workspace at all after rollback are soft-deleted. Approver assignments the import made are removed. Use this for "I uploaded the wrong file."
- **Hard-delete rollback** — Same as standard, plus a full purge of the created user records from Hours at Work. Use only when the CSV contained sensitive information that must not stay on our platform. Because it's destructive, this path is gated by a typed confirmation: you type **DELETE-IMPORTED-DATA** into the confirm field before the button unlocks.

The screenshot shows the 'Hours at Work' application interface. The top navigation bar includes 'Timesheet', 'Approvals', 'Reports', and a user profile 'Sam Reed'. The left sidebar has sections for 'TIME & MONEY' (Overview, Workspace, Charge codes, Pay periods, Pay categories) and 'PEOPLE' (People, Departments, User profiles, Approver assignments, Import rows, Import history, Billing). The main content area is titled 'Bulk import' under 'SETTINGS → PEOPLE'. It includes instructions to 'Upload a CSV to add many staff at once. Preview before you commit; undo within 24 hours.' and a section for 'Upload a CSV' with a description of required and optional columns. A 'Download CSV template' link is provided. A modal dialog titled 'Roll back this import?' is open, displaying details about the rollback process, including the number of users and rows affected, and a text input field for confirmation. The modal has 'Keep import' and 'Roll back import' buttons.

Roll back this import?

This rollback hard-deletes operational rows for users created by this import and removes both created and previously-attached users from the workspace. Audit-trail rows are preserved.

For **3 created user(s)**: remove **0** timesheet(s), **0** entry row(s), **3** profile row(s), and **3** employment-history row(s).

For **0 previously-attached user(s)**: remove from this workspace; preserve every pre-existing timesheet, entry, profile, and employment-history row.

Type **DELETE-IMPORTED-DATA** to enable the Roll back button.

Case-sensitive — type **DELETE-IMPORTED-DATA** exactly.

Keep import **Roll back import**

When a rollback is blocked. If any user the import created has already signed a timesheet as an approver, the rollback is blocked. The blocker dialog now offers **Reject-approved for rollback recovery** inline — clicking it retracts the signature on the specific blocking timesheet(s), then re-tries the rollback. Use it deliberately; it's a real signature reversal and it shows in the per-person audit timeline.

Why this matters. The 24-hour window is a real deadline. After it, undoing an import is one row at a time from Settings → People.

Daily workflow

Once your workspace is set up, day-to-day admin work is small but persistent.

Check on stuck items

If you're also an approver, glance at the **Approvals** queue once a day during the submission window. Scanning **Settings** → **People** → **Pending invitations** weekly catches invites that never got accepted, and glancing at the **Fallback queue** card catches timesheets waiting for an admin or analyst signature.

Process new-hire invites

Open **Settings** → **People** and use **Invite a teammate** for one or two people, or **Bulk import** for a full cohort. Set the role correctly the first time.

Add a new charge code when a grant lands

Open **Settings** → **Charge codes** → **Add charge code**. Set Kind to **Grant**, fill in Funder and Funder type, and save. New charge codes appear in the staff grid immediately.

Update an approver assignment

When someone transfers or moves to a new Approver, open **Settings** → **Approver assignments**. End-date the old assignment, then add the new one with the right effective-from date.

Cover an approver going on leave

Open **Settings** → **Approver assignments** → **Delegations**. Pick the Approver going out, pick the delegate, set the date range and an optional reason.

The screenshot shows the 'Delegations' form within the 'Hours at Work' application. The form is titled 'Delegations' and includes a descriptive paragraph: 'Cover an approver's queue for a date range — useful for vacations. The delegate gains approval rights for the originator's assignees while the window is active.' Below this, there are four input fields: 'From (approver going out) *' with the value 'Test User (test1@hoursatwork)', 'To (delegate) *' with a placeholder 'Type a name or email...', 'Starts *' with a date picker showing 'mm/dd/yyyy', and 'Ends *' with a date picker showing 'mm/dd/yyyy'. Below these fields are two lines of small text: 'Defaults to you. Admins can pick anyone.' and 'Whoever covers the queue.' A 'Reason (optional)' field contains the text 'PTO Aug 5-15'. A blue button labeled 'Delegate queue' is positioned below the reason field. Underneath the button, there are two sections: 'Queues you delegated' with the message 'You haven't delegated any queues.' and 'Queues delegated to you' with the message 'No one has delegated their queue to you.'

Delegations reroute the original Approver's pending queue without changing the underlying assignments. When the date range ends, everything snaps back automatically.

Delegations and the fallback queue. Delegations cover the regular Approver queue only. If a staff member on the delegator's team submits without an active assignment, that timesheet routes to the fallback queue — not to the

delegate. If the delegate happens to have fallback-signing rights on their own, they claim the fallback-queue timesheet as themselves.

Periodic tasks

End of each pay period — close the period

Once everything in a pay period has been approved, open **Settings** → **Pay periods** and click **Close** on that period's row.

Why this matters. Closing a period prevents new edits to timesheets inside it. Combined with Period locking, this is your audit boundary.

After payroll runs — apply a period lock

Open **Settings** → **Period locking**. In **Lock through date**, pick the date of the most recent pay period end and apply.

The screenshot shows the 'Period locking' settings page in the 'Hours at Work' application. The page has a sidebar on the left with navigation links: 'TIME & MONEY' (Overview, Workspace, Charge codes, Pay periods, Pay categories), 'PEOPLE' (People, Departments, User profiles, Approver assignments), and 'OPERATIONS' (Period locking, Billing). The main content area is titled 'Period locking' and includes a description: 'Lock all timesheets on or before a chosen cutoff. Locked timesheets become read-only — staff cannot edit, approvers cannot approve.' A red error message states: 'Chain verification failed — a nightly run on 2026-07-02 14:12:49 detected a mismatch in the signature ledger. Check the error log entries prefixed [HAW_CHAIN].'. Below this is a 'Lock through date' section with a 'Cutoff date' field (placeholder: mm/dd/yyyy) and a note: 'Every timesheet with week_start_date ≤ this date will be locked.' There is also a 'Note (optional)' field with the prompt 'Why are you locking this period?'. A 'Lock period' button is at the bottom of this section. The 'Recent locks' section shows 'No periods locked yet' with a lock icon and a note: 'Locking happens after each payroll run. Use the form above to lock everything on or before a cutoff date.' The 'Locked timesheets' section shows 'No locked timesheets' with a checkmark icon and a note: 'No timesheets currently in status "locked". Nothing to reopen.'

Period locking is your audit-readiness gate. Every timesheet ending on or before the Lock through date becomes uneditable.

What ends up on the audit file. Timesheets APPROVED before the lock keep their Signed PDF and appear in fiscal reports as `signed_hours_total`. Timesheets that were auto-locked without an approval signature appear as `unsigned_locked_hours_total` with an `unverifiable_reason=auto_locked_no_approval` tag and produce no PDF. If you see lots of unsigned-locked hours after a lock, reopen the affected timesheets and get them signed retroactively.

Quarterly — seed the next batch of pay periods

If the last seeded period is within two months, seed forward again. Same form as initial setup: cadence, anchor date, number of periods.

Quarterly — review the charge code list

For any grant that has wrapped, find the code, click **Edit**, and uncheck **Active**. History is preserved.

Annually — review workspace settings and pay categories

Confirm timezone, submission deadline, first day of work week, and the **Orphan timesheet routing** card on **Settings** → **Workspace**. Then confirm pay categories still match your payroll provider's expectations.

Reports and outputs

Admins don't pull aggregate reports — that's what the Access add-ons are for. But you have a few admin-facing outputs that matter for audits and onboarding.

Dates in the on-screen UI read in medium format (Jul 6, 2026). CSV downloads and PDF exports stay in ISO YYYY-MM-DD because payroll and audit systems depend on that shape.

People history

Settings → **People** → **History**. A running log of invites sent, roles changed, and Access add-ons granted or revoked.

The screenshot shows a modal titled "Employment history — Marcus Reverify" with a close button (X). The modal contains the following sections:

- ACTIVE** In effect since Jun 15, 2026
- Workflows**: Record change, Start leave, End employment, Correction
- Timeline**:

EFFECTIVE	THROUGH	STATUS	REASON	POSITION	FTE	NOTE
Jun 15, 2026	— (open)	• ACTIVE	hire	Analyst — Programs	1	
- Funding splits**:
 - ✓ SPLIT ON FILE In effect since Jul 2, 2026
 - Record split change
 - Table:

CHARGE CODE	NAME	ALLOCATION
HRSA-330	HRSA 330 - Federal Health Grant	100.00%
 - Table:

EFFECTIVE	THROUGH	REASON	ALLOCATION	NOTE
Jul 2, 2026	— (open)	Initial allocation	HRSA-330 100.00%	

Pending invitations

Settings → **People** → **Pending invitations**. Anyone who hasn't accepted yet, with how long the invite has been outstanding.

Bulk import history

Settings → **People** → **Bulk import** → **History**. Every bulk import you've committed, with committed_at, actor, row counts (created / attached / skipped / invalid), and — inside the 24-hour window — Rollback and Hard-delete-rollback buttons.

Hours at Work

TimesheetApprovalsReportsSam Reed

TIME & MONEY

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SETTINGS — PEOPLE

Bulk import

Upload a CSV to add many staff at once. Preview before you commit; undo within 24 hours.

Upload a CSV

CSV with email, display_name, role columns (case-insensitive). Optional: approver_email, employee_number, department, position_title, cost_center, payroll_number, hr_analyst, fiscal_analyst, fiscal_manager, fte, hire_date.

Download CSV template

Three demo rows show staff, approver, and create-with-approver shapes. Replace before uploading.

CSV

Choose a CSV file or drag it here

Up to 5 MB and 5000 rows.

Import history

Recent bulk imports on this workspace. Roll back is available for 24 hours after each commit; afterwards remove users individually.

Committed	Committer	Row counts	Status	Actions
Jul 2, 2026 · 2:16 PM	Sam Reed	1 created · 0 attached	ROLLBACK AVAILABLE	Roll back
Jul 2, 2026 · 6:09 AM	Sam Reed	1 created · 0 attached	ALREADY ROLLED BACK AT 2026-07-02 06:39:29	Roll back

Recent locks

Settings → Period locking → Recent locks. Every lock you've applied, including who you were when you applied it and how many timesheets it captured.

Per-person audit timeline

Settings → User profiles → Timeline. A change history for one person — role changes, access grants, profile edits, and approver-assignment changes made from the Edit User modal's Approver assignment section.

Billing

Settings → Billing. Subscription status, plan, invoice history.

Hours at Work

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TIME & MONEY

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Billing

Your subscription, plan, and payment details.

Billing not yet enabled

The platform operator has not finished Stripe setup yet. You can keep using the app — billing UI will appear here once Stripe is configured.

History

Recent billing changes on this workspace, newest first.

No history yet. Closure events appear here as they happen.

Workspace closure

You can close this workspace any time. A 14 - day grace period lets your team finish active timesheets and export their data. After the grace window the workspace becomes read - only; no data is deleted.

Schedule workspace closure

Hours at Work

Timesheets

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Support

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Billing operations are covered separately at hoursatwork.com/billing-help.

Troubleshooting

"Staff says they can't submit their timesheet"

A missing Approver assignment no longer blocks submission — the timesheet routes to the fallback queue. Two things to check:

1. **Approver assignment.** Open **Settings** → **Approver assignments**. If the person has no active assignment, add one. The fallback queue caught this submission; a proper assignment routes the next one correctly.
2. **Pay period status.** If the period containing the week is CLOSED, click **Reopen**.

"A timesheet I closed needs editing again"

- One timesheet: **Settings** → **Period locking** → **Locked timesheets** → **Reopen** on that row.
- Whole period: **Settings** → **Pay periods** → **Reopen** on the period row.

Reopening is logged in Recent locks. Reopen the smallest unit you can.

"The bulk import Rollback button is grey"

Two likely reasons: the 24-hour window has expired (past that, disable users one at a time from Settings → People), or a user the import created has already signed a timesheet. The blocker dialog offers **Reject-approved for rollback recovery** inline — clicking it retracts the signature on the blocking timesheet(s), then re-tries the rollback.

"I changed the first day of work week mid-week and now staff are confused"

In-progress drafts at the old boundary remain accessible by their original URL — Prev / Next walk through them. When staff click **This week**, they land on a fresh empty timesheet at the new boundary. The cleanest fix is to flip the setting back if no entries have been saved at the new boundary.

"A new grant arrived mid-period — can staff backfill?"

Yes. Add the charge code now. It appears immediately in the staff grid for the current open week.

"An approver is out and the queue is piling up"

Settings → **Approver assignments** → **Delegations**. Set From, To, and the date range. The delegate sees the original approver's queue. When the date range ends, the delegation auto-expires.

"A staff member says they never got a temp password"

Temp passwords are one-time credentials that expire after 7 days. Open **Settings** → **People**, find the row, click **Re-issue temp password**. The re-issued password shows in the same masked reveal you used at import time.

Cross-references

The admin role ends where the daily workflows of the other roles begin.

- **Getting started guide** — workspace request flow and the first-login reset page from the top.
- **Staff Manual** — how staff use the charge codes you've set up, including the empty-state they see before you're finished.
- **Approver Manual** — what the approver sees in their queue, and how signing works.
- **Fiscal Analyst Manual** — how Funder + Funder type drive the Funding Reconciliation report and bundle PDFs for funder audits.
- **HR Analyst Manual** — the weekly close, payroll readiness, and how Period locking fits into the HR Analyst's recurring rhythm.

End of Admin Manual.