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.

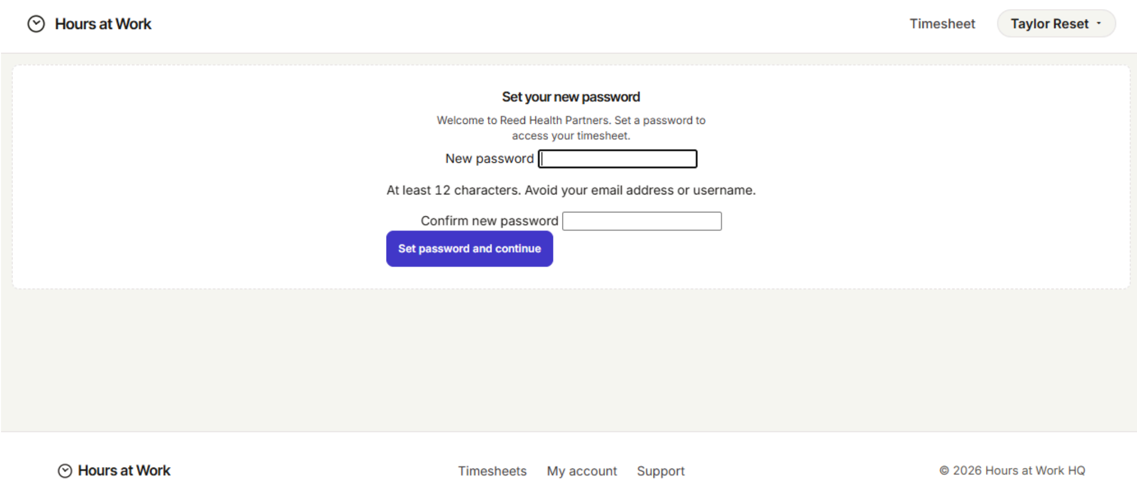
Getting started

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**.



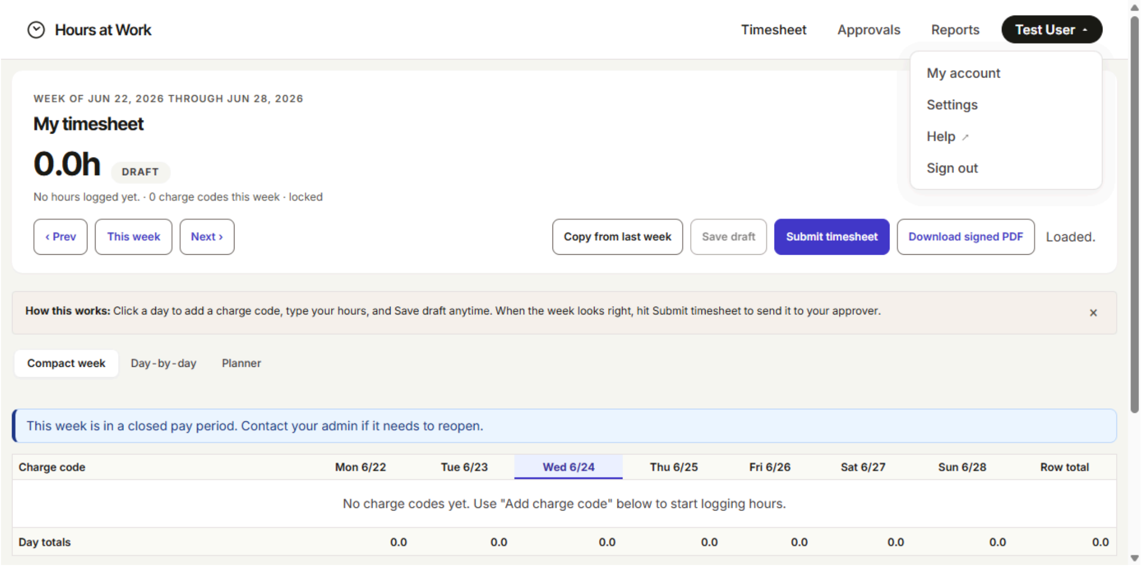
Why this matters. Every workspace lives on its own URL. If you land on the generic hoursatwork.com sign-in by accident, the system won't know which workspace you mean. The reset page routes first-login flows through the HAW-owned interface, so what you see matches what your staff will see when you bulk-import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

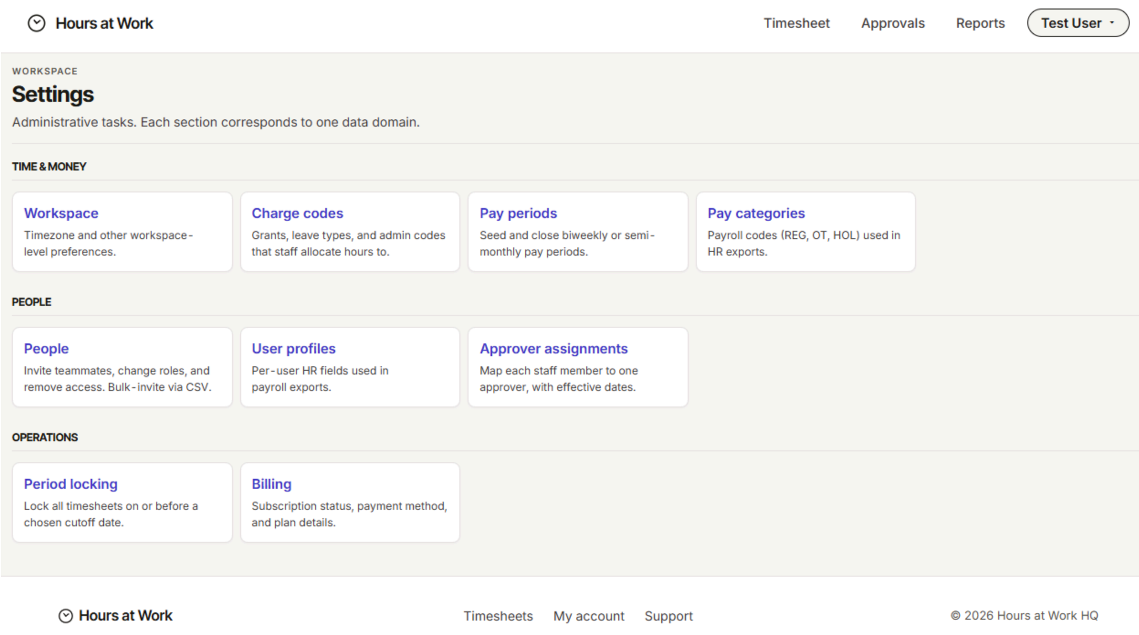
2. Open Settings

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



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.

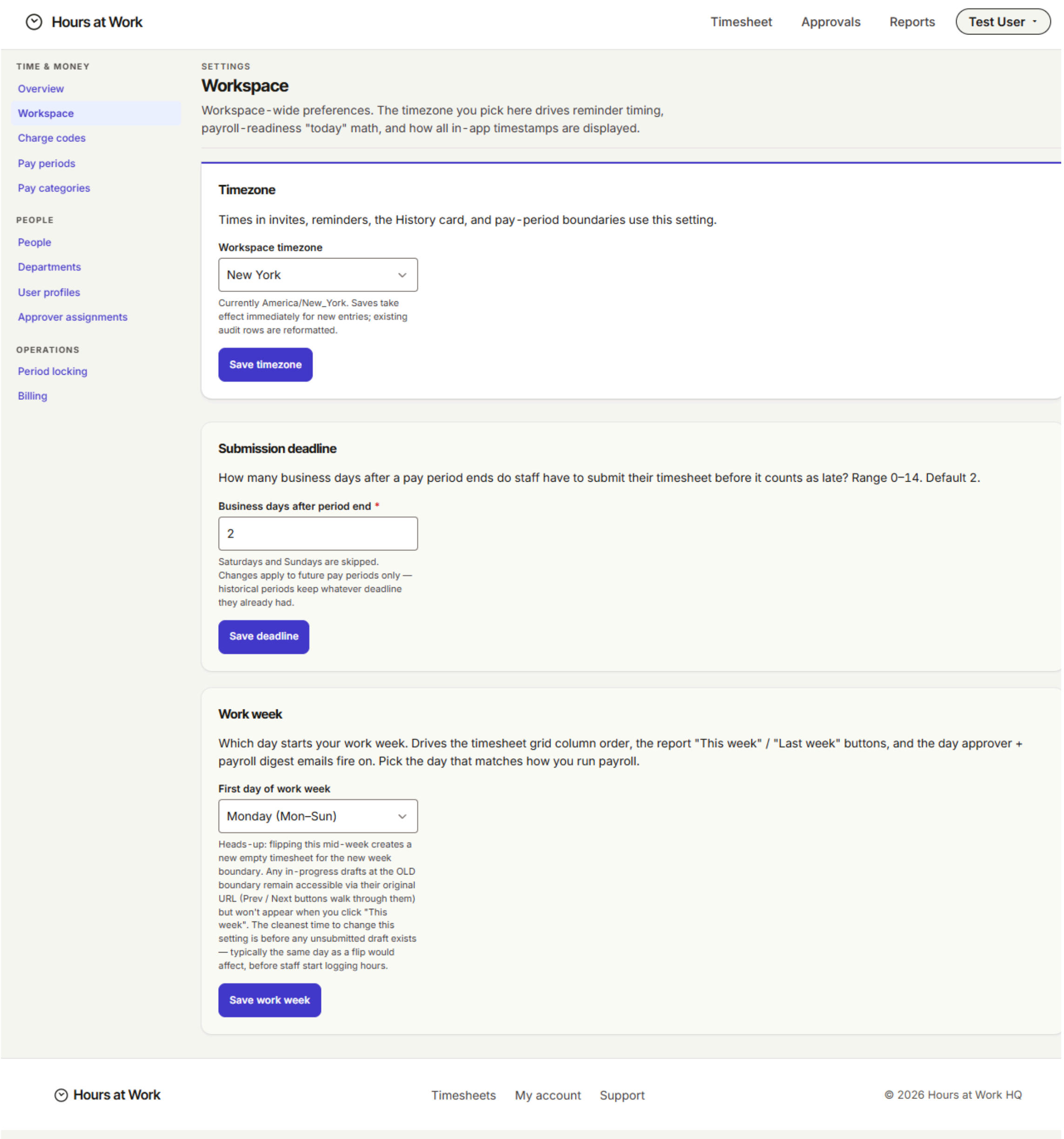


Why this matters. The Settings link is your home base for every admin task in this manual. If you ever feel lost, come back here.

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).



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.

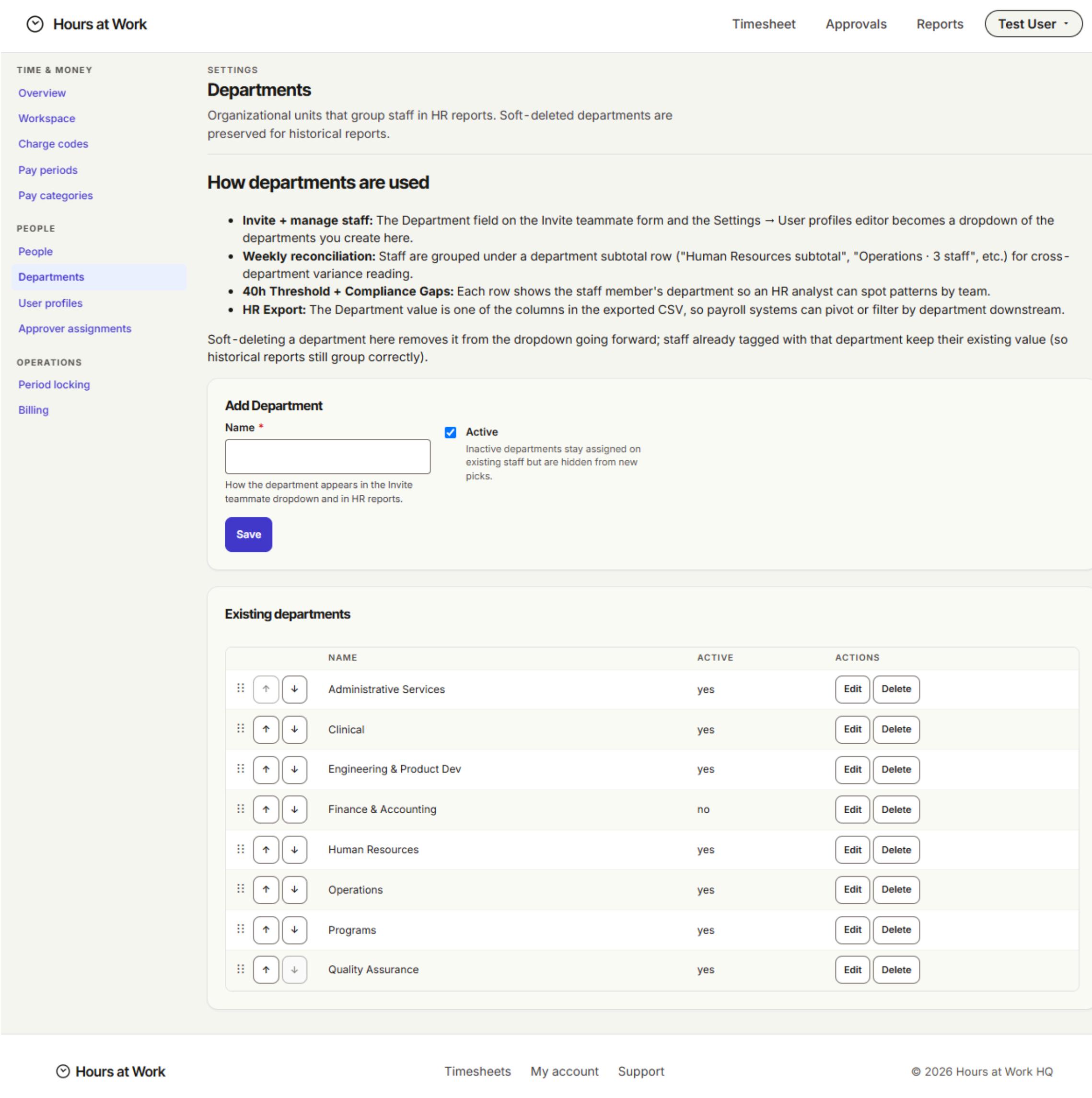
About changing work week mid-stream. Flipping the first day of the work week creates a fresh empty timesheet at the new boundary. Any in-progress drafts at the old boundary stay accessible by their original URL — the ‹ **Prev** and

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.



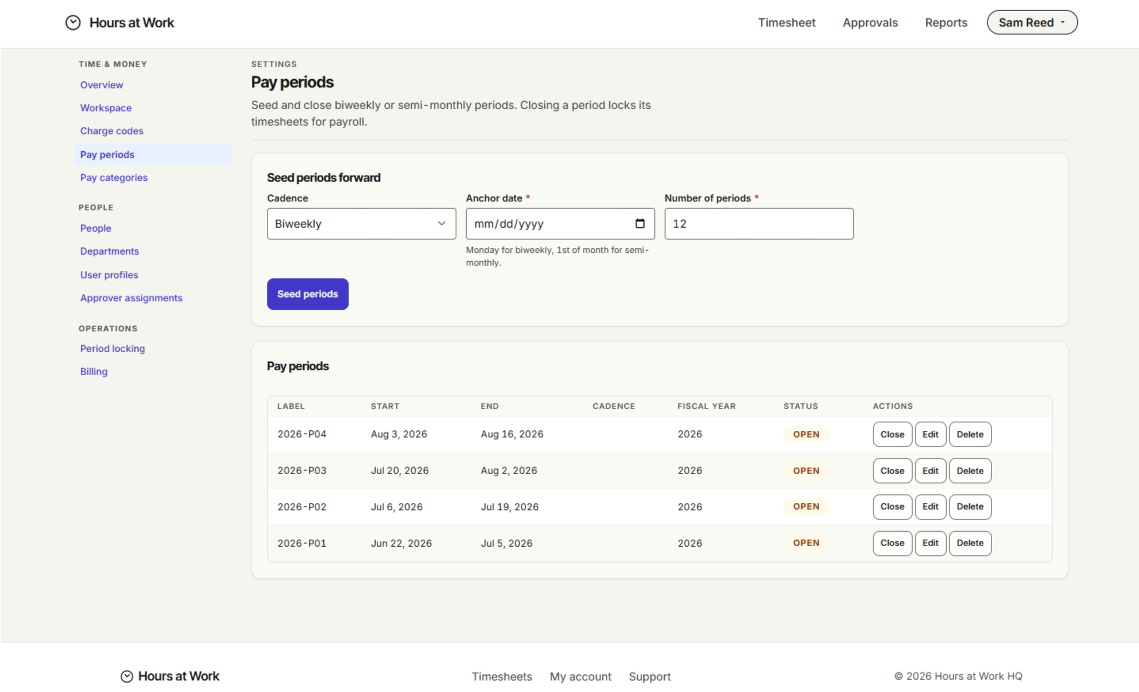
Why this matters. Departments are an optional grouping you can attach to each staff member's User profile. Reports — Weekly Reconciliation, Funding Reconciliation, 40h Threshold — let your analysts filter by Department. Skip this step if everyone's in one bucket; come back when your team grows.

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.

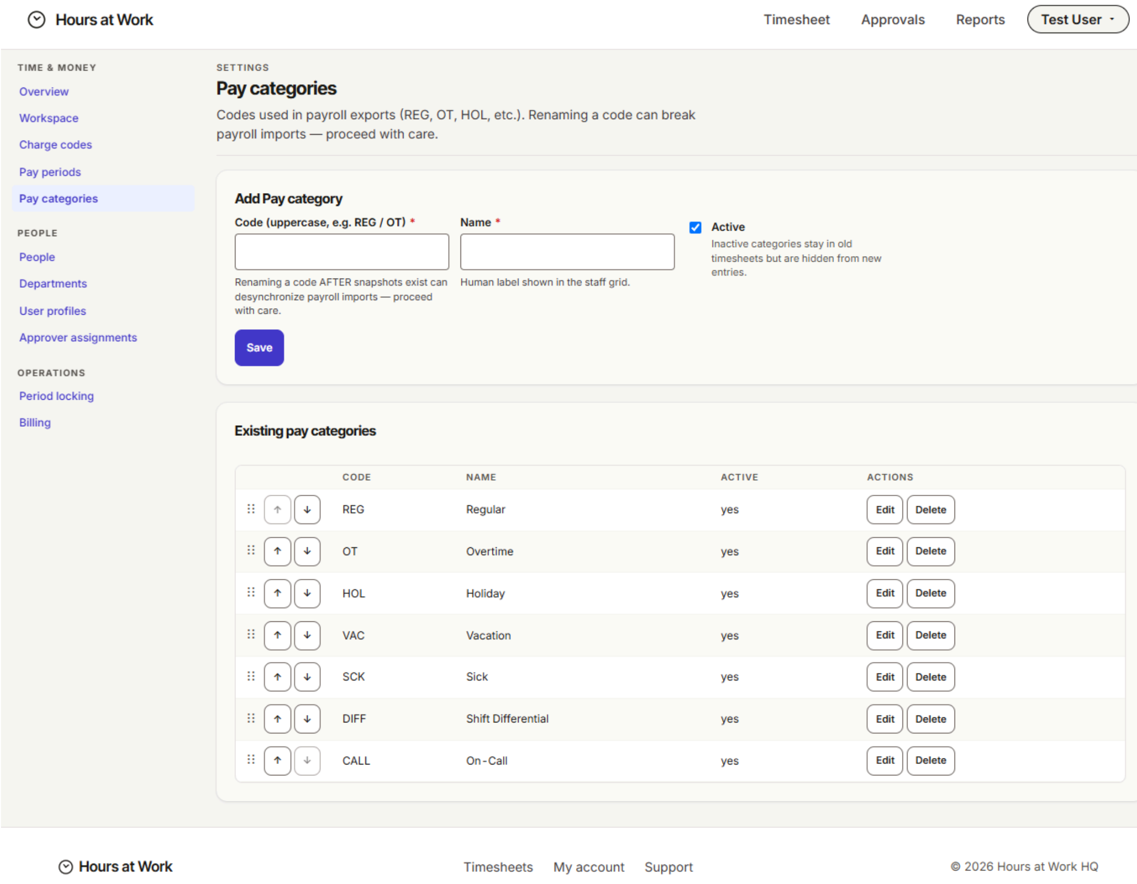
Click **Seed periods**.



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).



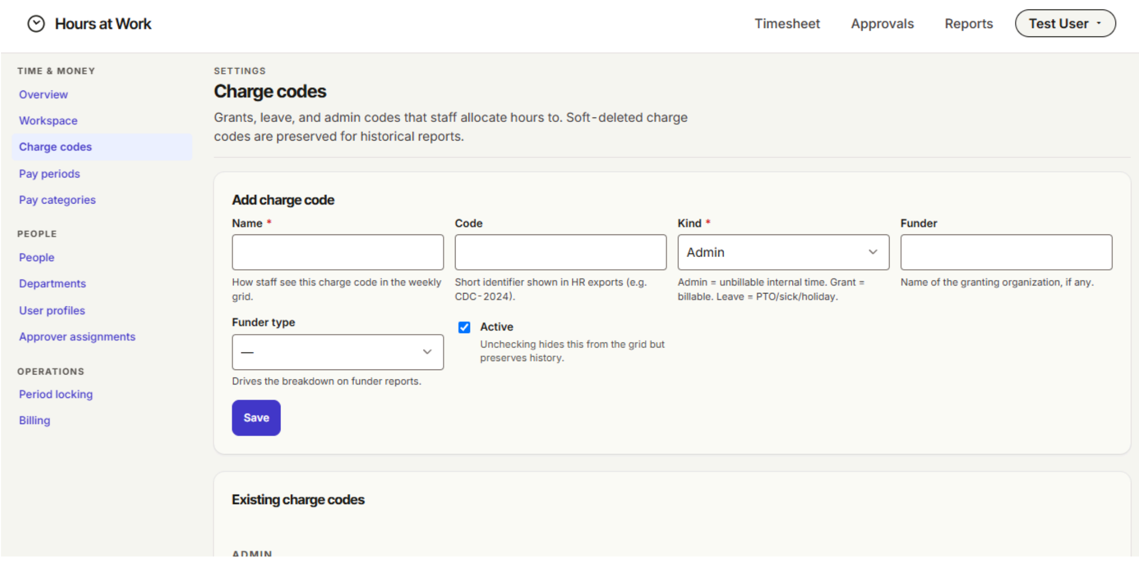
Why this matters. Pay categories are payroll codes. They classify hours for your HR Analyst's payroll-ready export. They're different from charge codes (which describe *what* the work was for). Most workspaces never need to touch this list.

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.



Hours at Work

Timesheet Approvals Reports Test User

TIME & MONEY
- Overview
- Workspace
- Charge codes
- Pay periods
- Pay categories

PEOPLE
- People
- Departments
- User profiles
- Approver assignments

OPERATIONS
- Period locking
- Billing

SETTINGS

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 *
How staff see this charge code in the weekly grid.

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

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

Funder
Name of the granting organization, if any.

Funder type
—
Drives the breakdown on funder reports.

Active
Unchecking hides this from the grid but preserves history.

Save

Existing charge codes

ADMIN

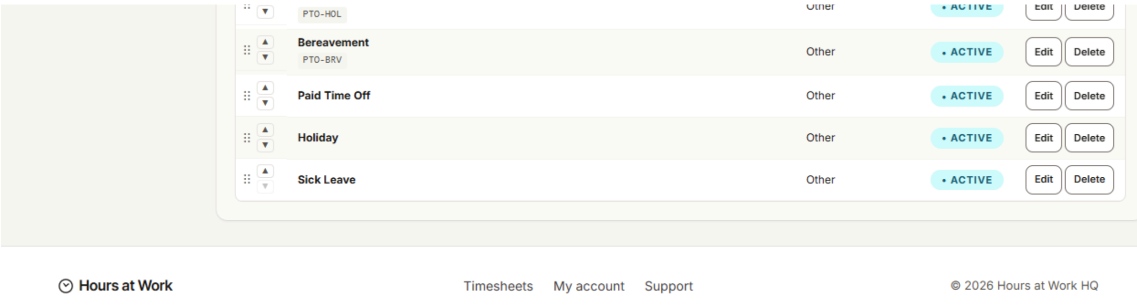
NAME	FUNDER	FUNDER TYPE	ACTIVE	ACTIONS
General Administration ADMIN-GEN		Other	• ACTIVE	Edit Delete
Fundraising FUNDRAISE		Other	• ACTIVE	Edit Delete
Training & Professional Dev TRAINING		Other	• ACTIVE	Edit Delete
General Fund		Other	• ACTIVE	Edit Delete

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 RWHAP-A	HRSA	Federal	• ACTIVE	Edit Delete
HRSA Ryan White Part C RWHAP-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				



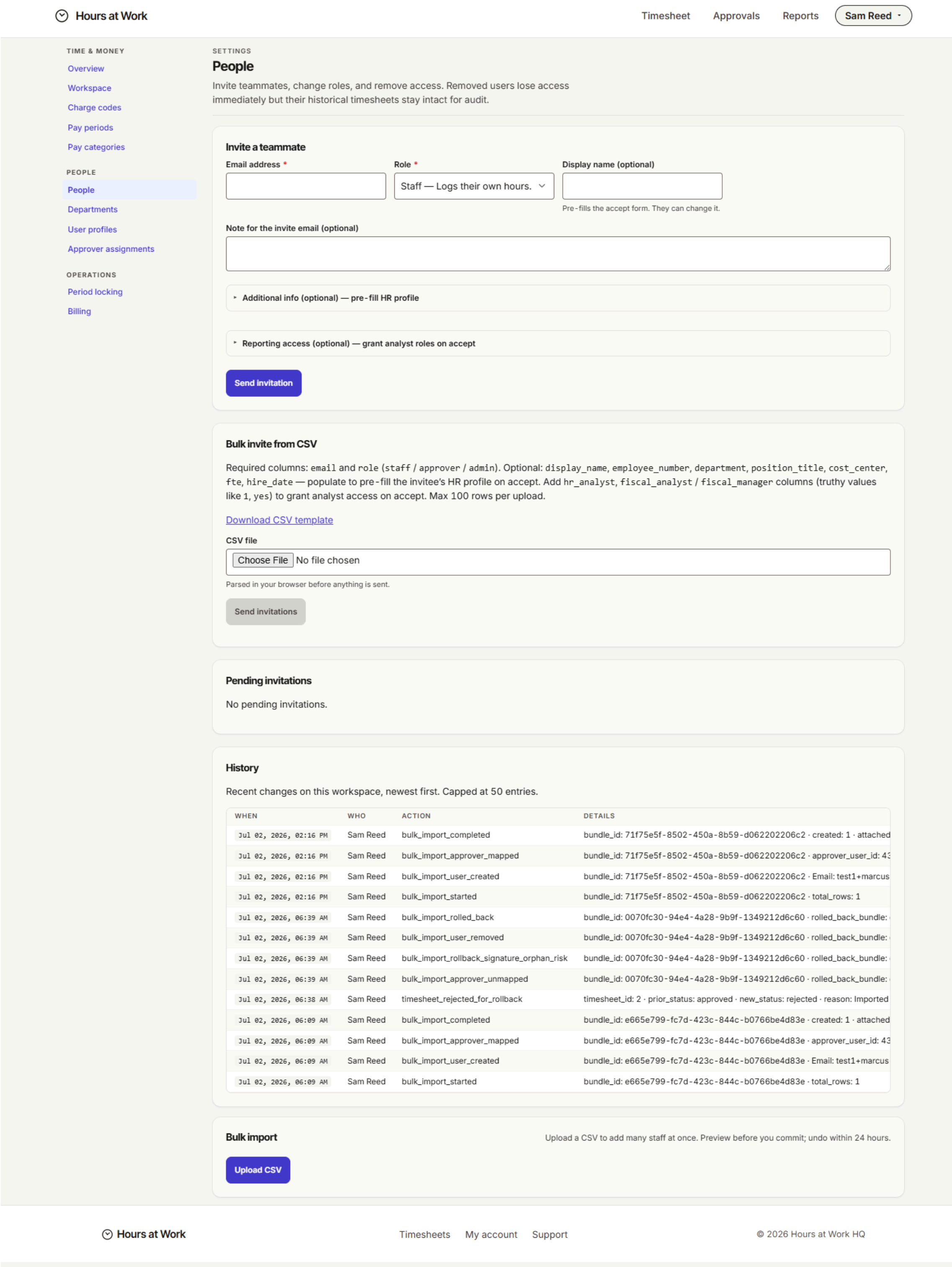
Why this matters. The charge code list is the spine of everything else. Staff allocate hours to charge codes. Approvers approve hours against charge codes. Fiscal Analysts pull funder reports by Funder + Funder type. Get the Funder and Funder type fields right when you create a Grant code — they're what 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.

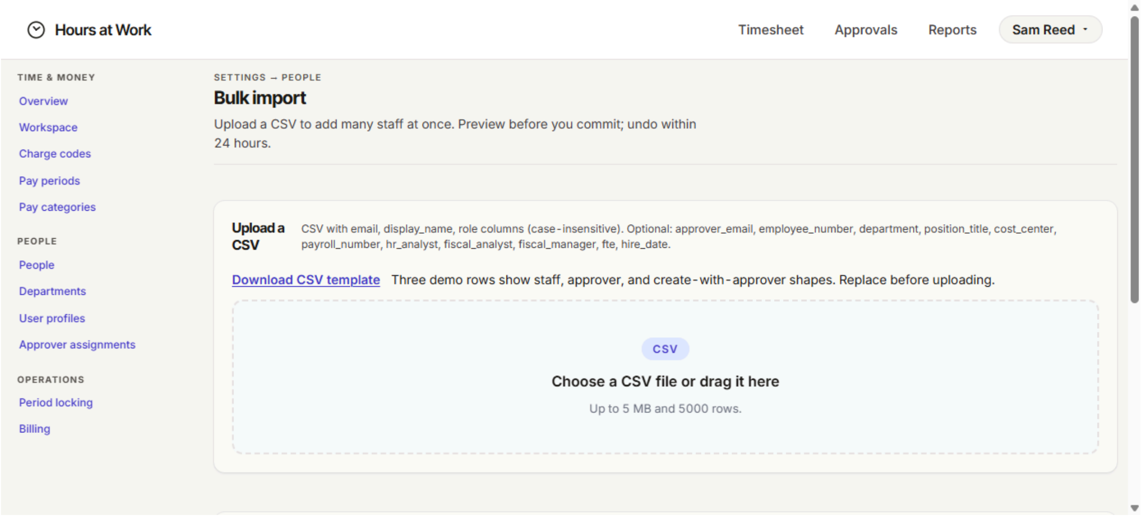
8. Invite your team

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.

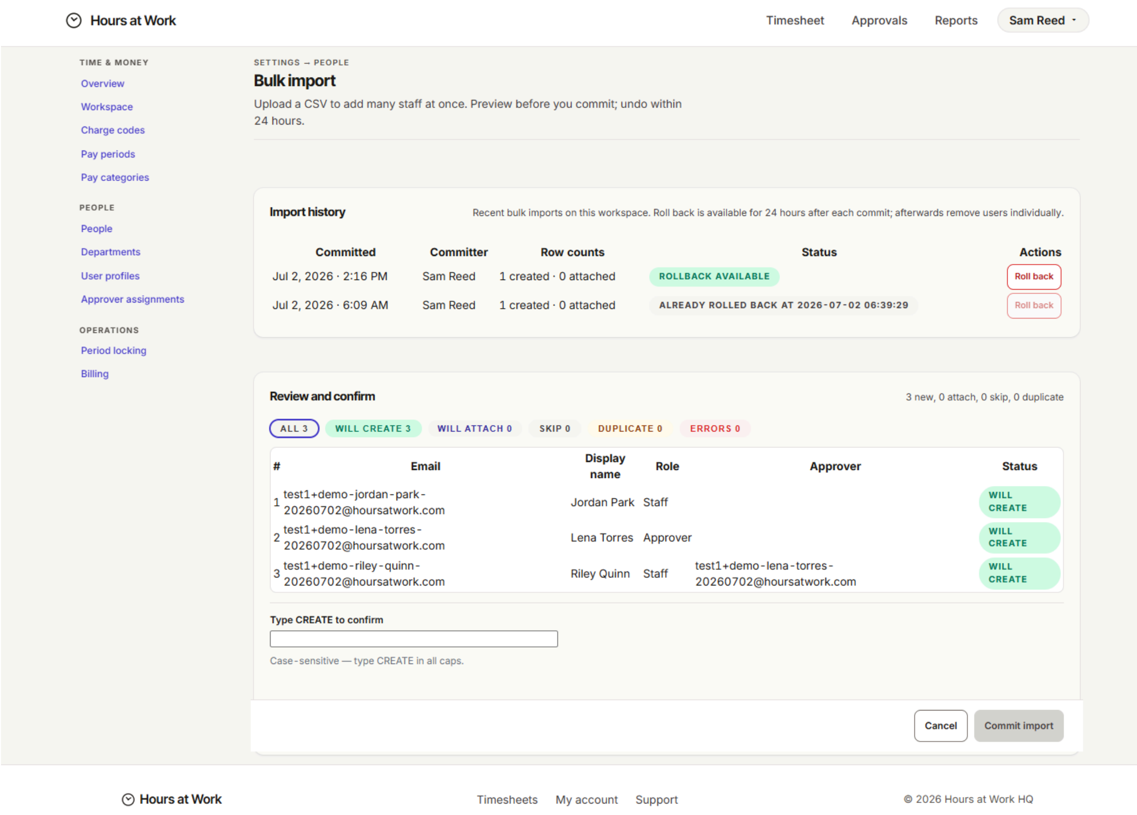


Bulk import from CSV. For anything larger than a handful of people, scroll to the **Bulk import** card and click **Open bulk import**. You land on the dedicated bulk import page at `/staff/timesheets/settings/people/bulk-import/`.

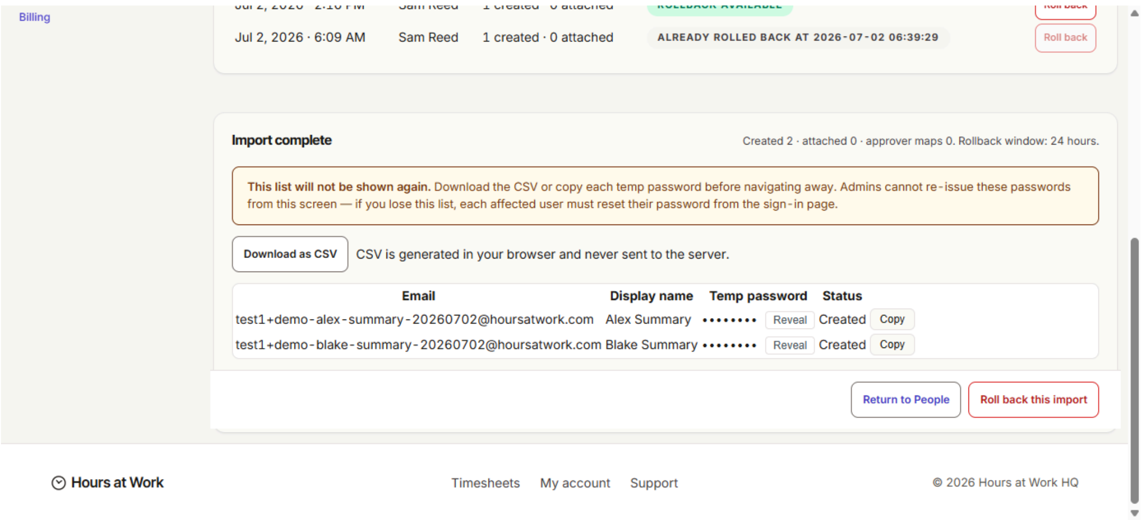


Click **Download template** to grab the CSV template. It has the columns Hours at Work expects: email, display_name, role, approver_email, department. Fill in your rows — up to 5,000 per import — and save the file.

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.



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.

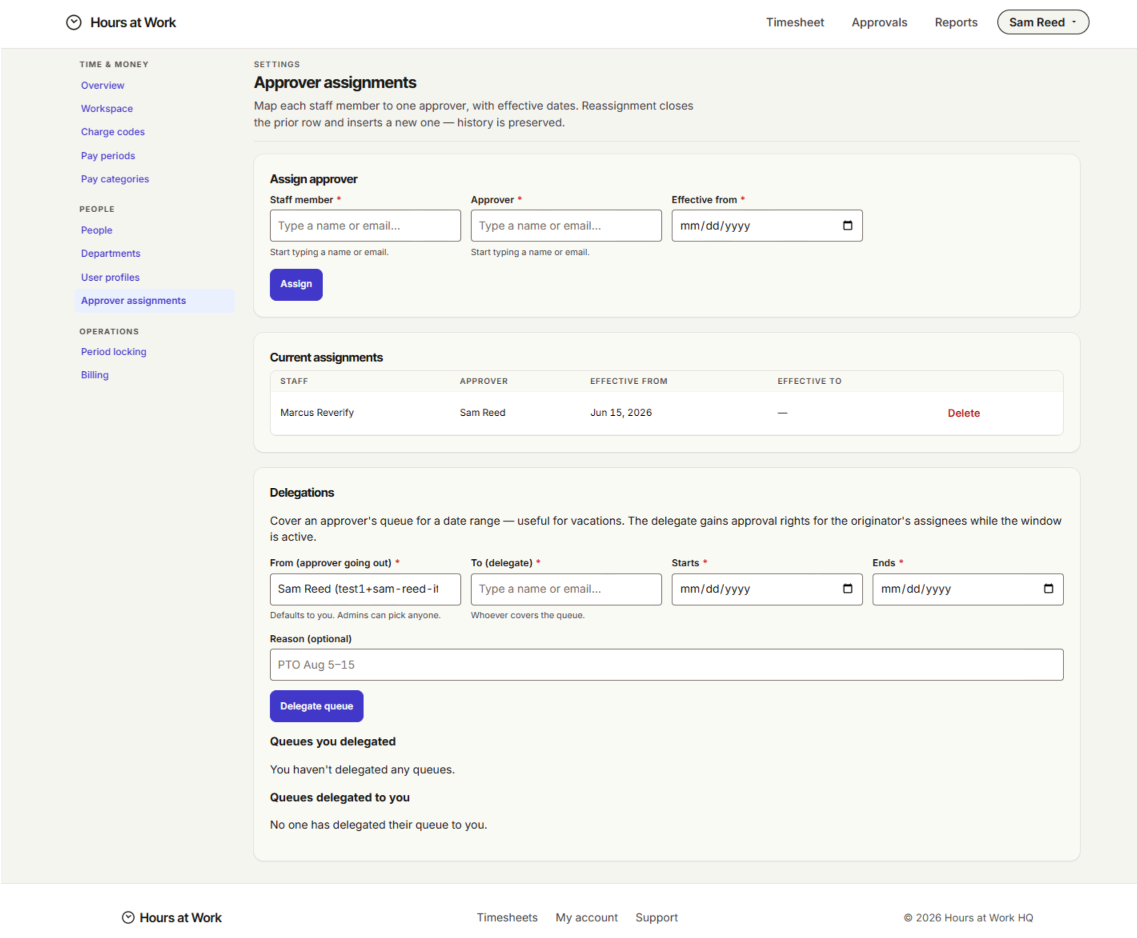
If the **Bulk import** card isn't visible, your network admin hasn't turned the feature on for this workspace. Contact Hours at Work support to enable it.

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.



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.

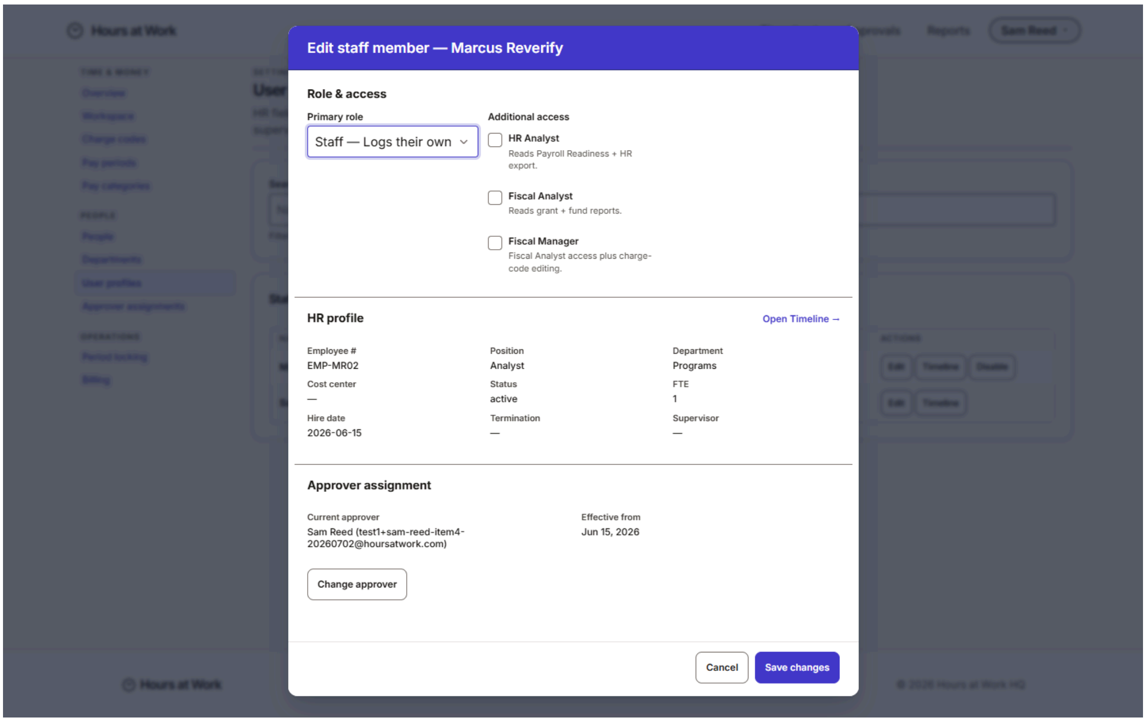
10. Grant analyst access (if applicable)

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.



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.

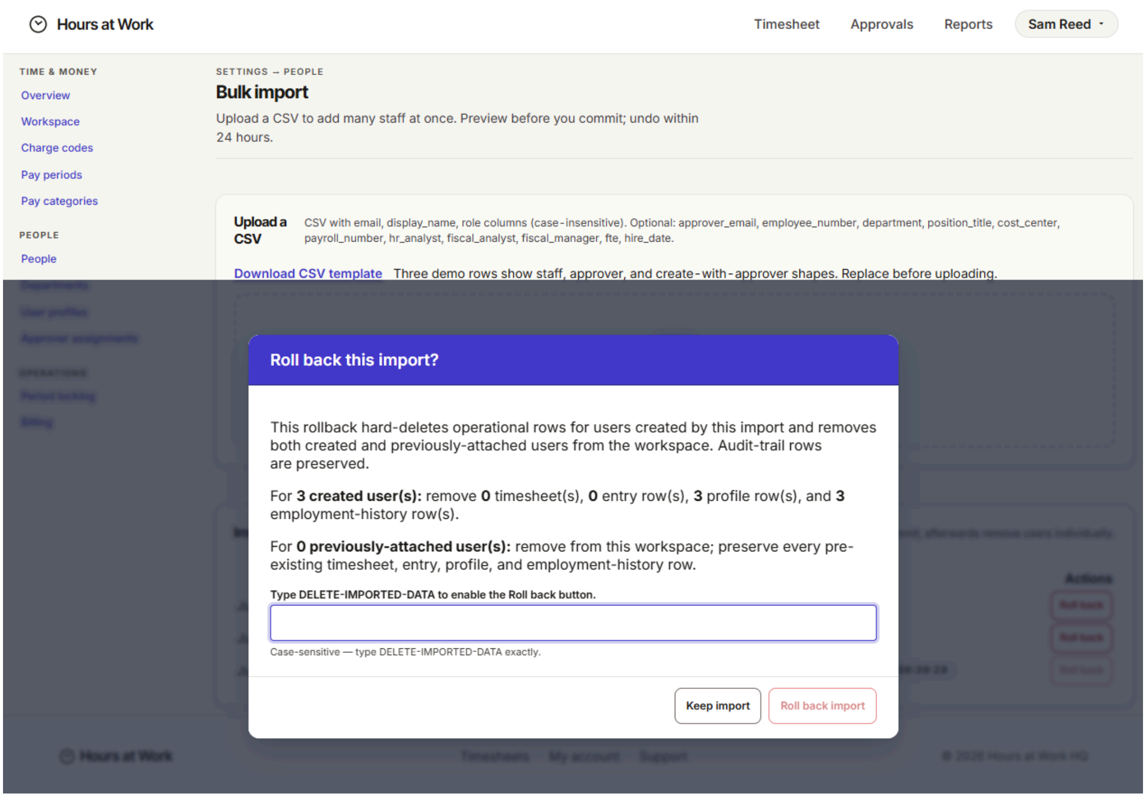
Why this matters. The fallback queue exists so no submission is ever lost to a missing assignment. Admins and HR Analysts are the safe defaults; Fiscal Analysts are opt-in because their day-to-day is fund-side reporting rather than people management.

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.



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

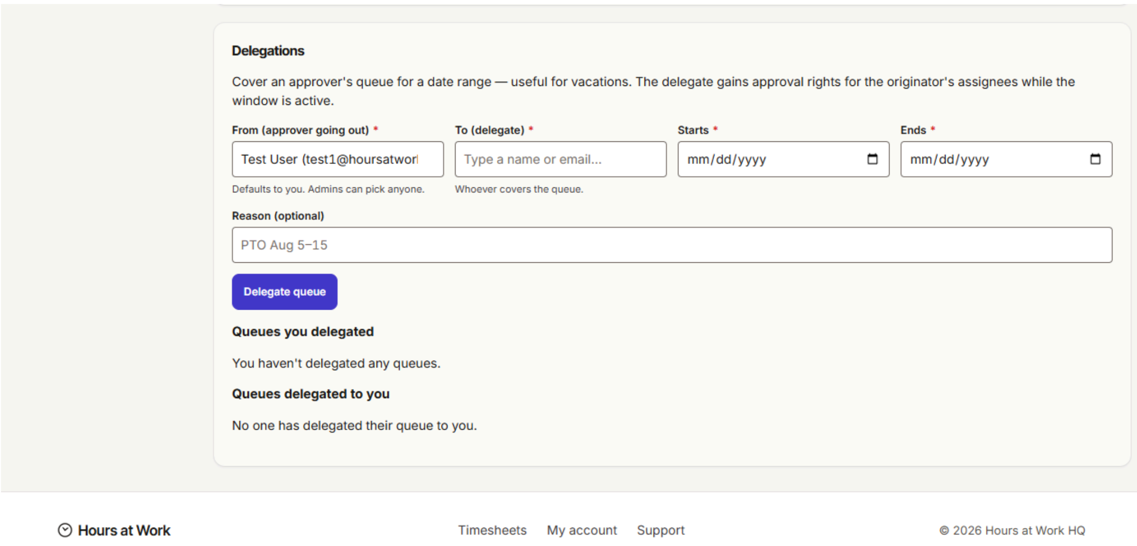
Open **Settings → Charge codes → Add charge code**. Set Kind to **Grant**, fill in Funder and Funder type, and save. New charge codes appear in the staff grid immediately.

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.



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

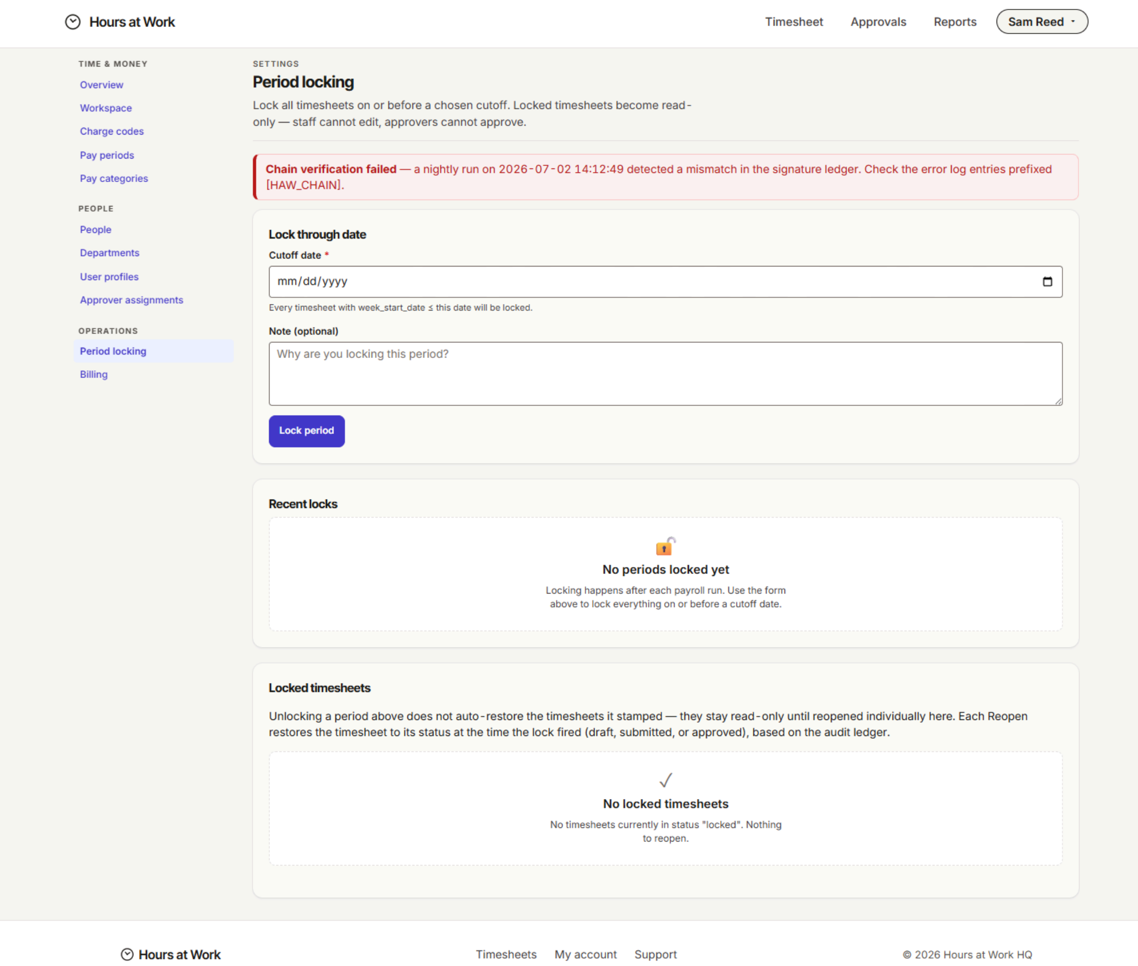
End of each pay period — close the period

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.



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.

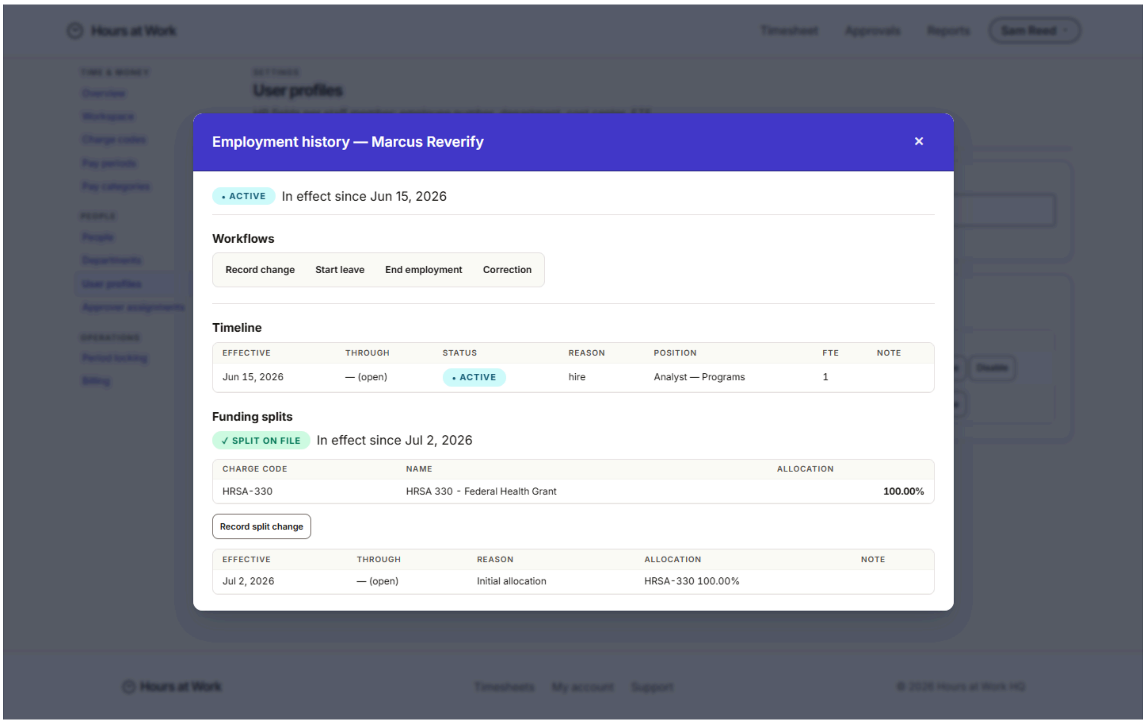
Reports and outputs

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.

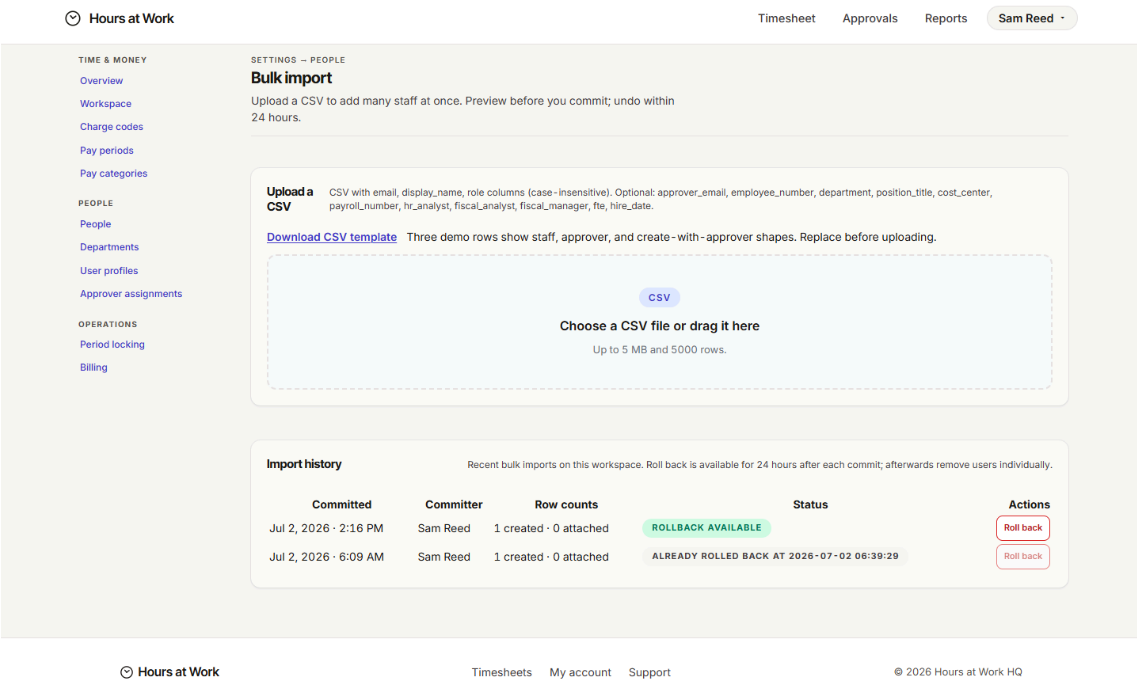


Pending invitations

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.



Recent locks

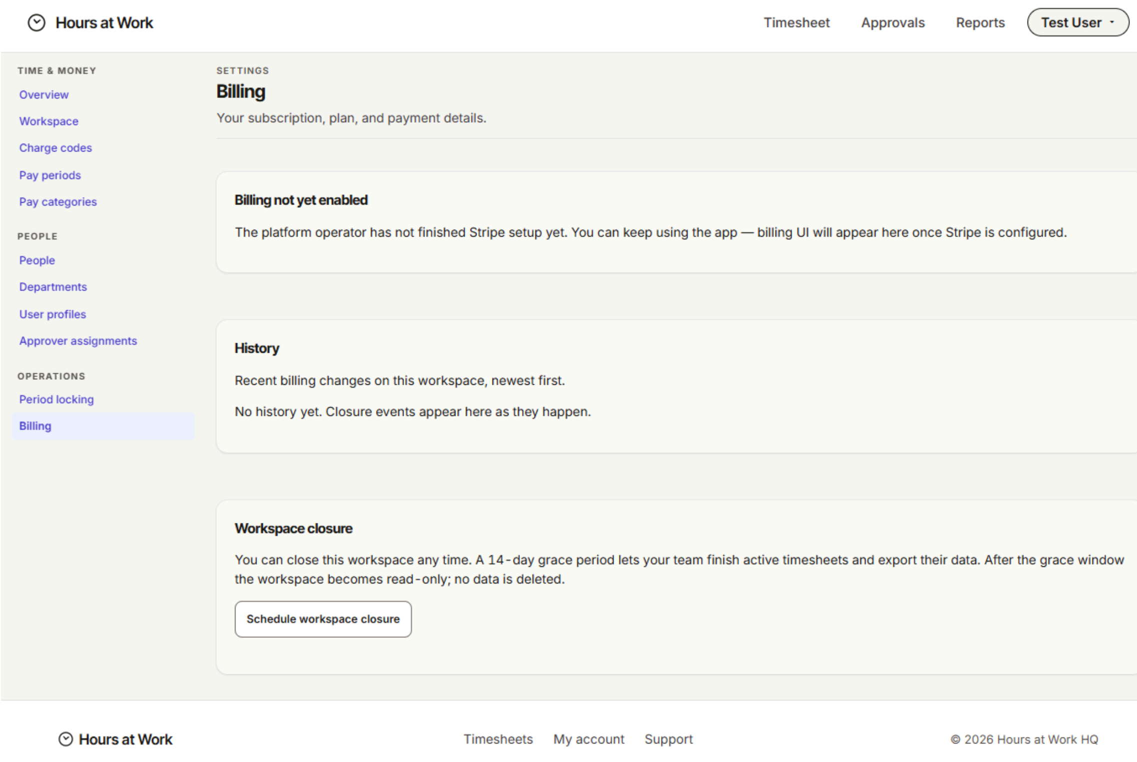
Settings → Period locking → Recent locks. Every lock you've applied, including who you were when you applied it and how many timesheets it captured.

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.



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.