teamdeck

Get started
guide

www.teamdeck.io

01. What is Teamdeck?

Teamdeck is a complete resource management solution. It helps companies to plan the work of their teams, monitor their workload and analyze the company's performance.

Our mission is to make companies operate more efficiently while maintaining team happiness. We believe that this can be done by means of **optimal workload, workplace transparency and work-life balance.** Teamdeck is designed to nurture all three aspects.

From the employee's point of view, Teamdeck is a tool to:
• Control your working time
• Plan your availability at work and time off
• Get a better idea of your upcoming assignments
• Understand your personal productivity style
• Streamline communications with your managers

Let's walk you through Teamdeck's features, starting with the core element of this tool: **a calendar where you can plan and track your time.**

But first, you have to activate your account in order to get in. It starts with an email entitled *You are invited to Teamdeck workspace.* That means that somebody wants you to join their company's Teamdeck account.

Open the email and click the get started button. The next step is to create your Teamdeck account (if you're new to Teamdeck) or to log in with your existing credentials. Once you're logged in, you will be asked to click accept invitation, and, as a result, join your company's account.

teamdeck

02. Manage your calendar with Teamdeck

When you enter the Calendar tab (it's available in the top menu), you'll see your name and, optionally, the names of your team members. This depends on your company's policy.
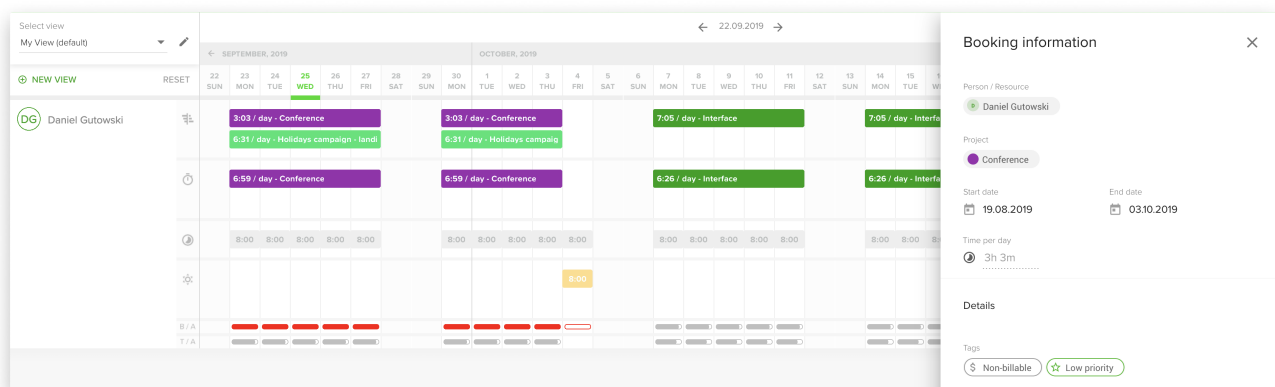
Next to each name, there are rows signified by different icons.
Let's go through them one by one:

Bookings
This is where you will see your bookings, i.e. work assignments. They can be added and edited by your managers. Click on a booking to learn more details about your upcoming tasks.

Availability
The number of working hours you're available for on a given day. If you're a full-time employee, this row won't be editable.

Vacations
The space for your personal time off. All absences, paid or not, will appear here.

Bookings compared with Availability (B/A) & Timesheets compared with Availability (T/A)
these rows make it easy to spot potential and actual overtime. When bookings and timesheets exceed your daily availability, the B/A and T/A bars turn red.
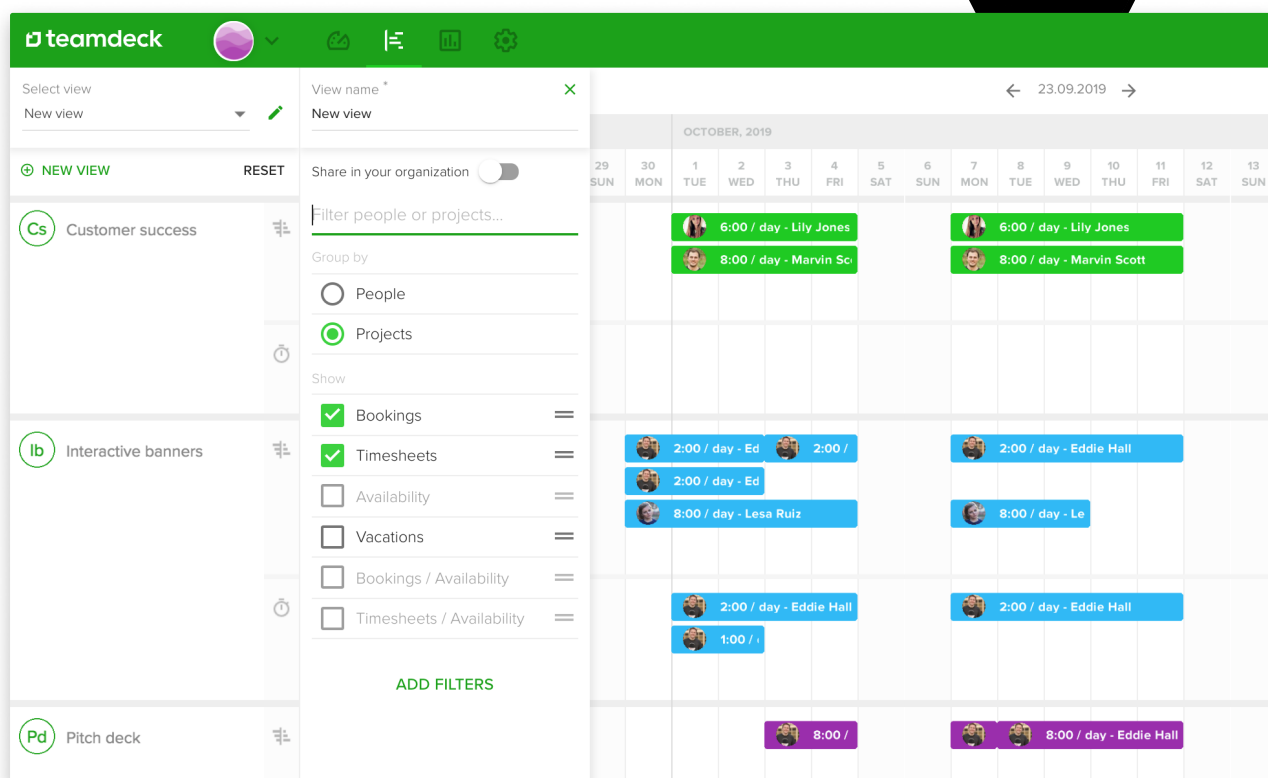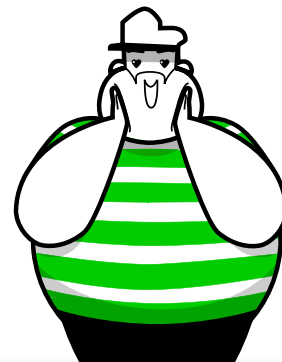
Timesheets
This is the space for your recorded time entries, the time you spent working on a given project. You can add, edit or remove entries from the timesheets row. On the next slides you'll learn more about tracking your time with Teamdeck.

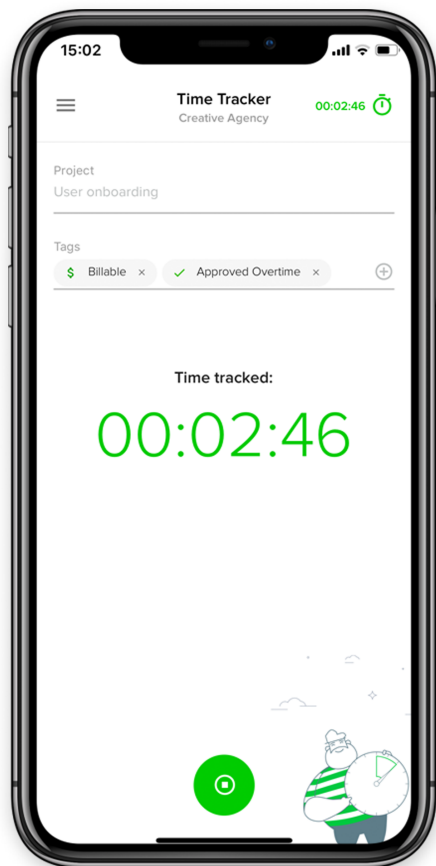teamdeck

03. Create a custom **calenadar** view

You can change the level of information displayed on your Teamdeck calendar. In order to edit your default view or to add a new one, click on a pencil icon 🖉 in the upper left corner of your calendar.

Next, you'll be able to pick the elements you want to keep in your calendar view. **You can also decide to change your view from people to projects**: if you pick the latter, you'll see a list of projects and bookings with people's names on them.

04. Time tracking with Teamdeck

There are two ways to populate your timesheets:

01 Use a **mobile time tracker** to keep track of your working time. Pick a project you're about to work on, click play when you start your tasks and stop the timer when you're done. Your time entries will be saved automatically. Teamdeck's mobile app is available for Android and iOS devices.
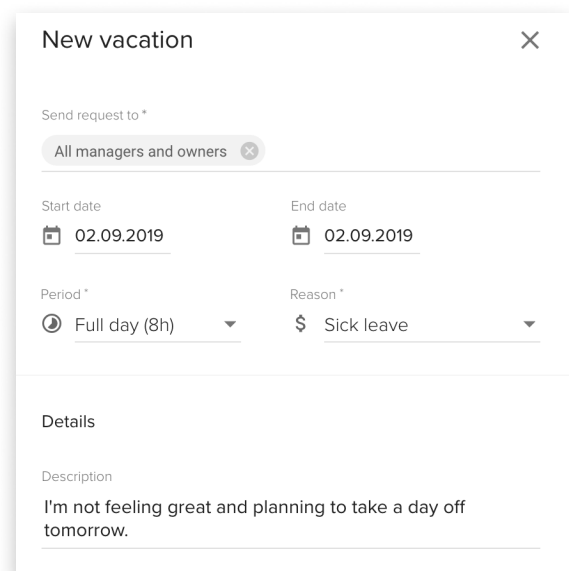
02 Add time entries **manually**. Go to the calendar, pick a date in the Timesheets row and click on it. You'll see a drawer where you can provide more details about your time entry.

teamdeck

05. Request time off with Teamdeck

Teamdeck is used for absence management by many companies. It's handy, because **employees can request vacations themselves.** Managers just need to approve or deny these requests: everything happens within the app, so there's no need for email threads and so on.

Your absence will be acknowledged by your team leaders and noticed by people responsible for resource scheduling. This helps companies to **eliminate scheduling conflicts** once and for all.

In order to request some time off, you need to **click on a date** (or a set of dates) in your calendar (in the Vacations row). Then, **fill out a request form** and wait for a system notification regarding the status of your request.

New vacation ✕

Send request to *

All managers and owners ✕
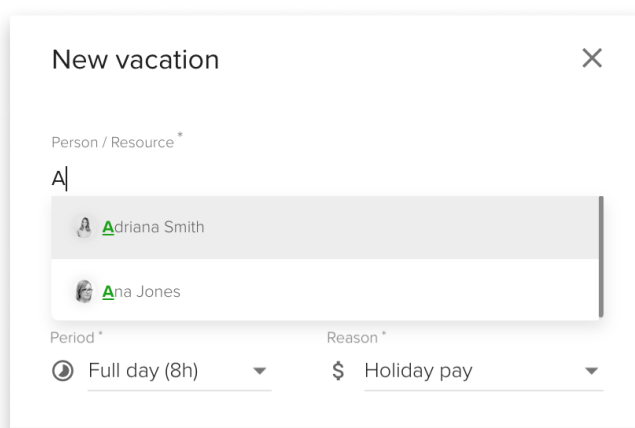
Start date
02.09.2019

End date
02.09.2019

Period *
Full day (8h) ▼

Reason *
$ Sick leave ▼

Details

Description
I'm not feeling great and planning to take a day off tomorrow.

New vacation ✕

Person / Resource *
A|

A **A**driana Smith

A **A**na Jones

Period *
Full day (8h) ▼

Reason *
$ Holiday pay ▼

TIP: If you know who's in charge of your vacation requests, you can pick that person from the drop down list. Otherwise, your request will be received by all Teamdeck users with manager and owner permissions in your organization.

teamdeck

06. Manage your availability with Teamdeck

New availability   ✕

Person *
🅐 Adrianna Konieczna ⊗

Date   ⬤ Repeat entry
📅 26.02.2019

Repeat every 1 week(s)
between 16.09.2019 - 30.11.2019 on

☐ Mo   ☑ Tu   ☑ We   ☑ Th   ☐ Fr   ☐ Sa   ☐ Su

Check in   Check out
🕐 8:00   ▼   🕐 16:00   ▼   ⊖
08:00 UTC+02:00   16:00 UTC+02:00

Check in
🕐 17:00   ▼   🕐 Check out   ▼   ⊕
17:00 UTC+02:00

DISCARD   **SAVE**

This feature is usually reserved for part-time employees and freelancers. If you're a full-timer, chances are that you won't need to use it.

The availability row in your calendar is where you can define your daily availability. Add periods during which you're free to work. You can create several availability periods per day.

Do you have a fixed schedule? Your availability periods can be repeated every week.

teamdeck

07. Analyze your work with Teamdeck

Reports allow you to take a deeper dive into your data. You can monitor your billable hours or compare bookings with actual time spent working on a given project to assess your estimates.
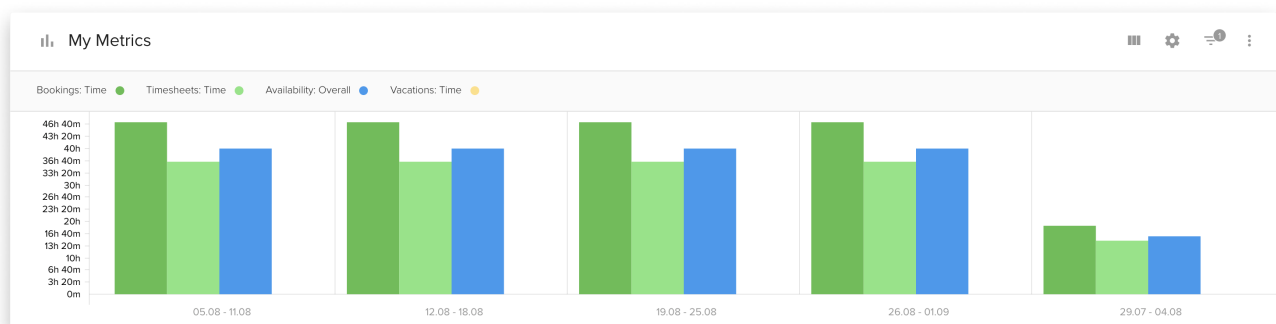
If you're invoicing your company based on your timesheets, you can easily calculate the amount of money within the reports.

Name	Timesheets	Hourly rate	Expected payroll
	Time		
▶ 29.07 - 04.08	14h 36m	$45	$657
▶ 05.08 - 11.08	36h 30m	$45	$1642.5
▶ 12.08 - 18.08	36h 30m	$45	$1642.5
▶ 19.08 - 25.08	36h 30m	$45	$1642.5
▶ 26.08 - 01.09	36h 30m	$45	$1642.5
Total	160h 36m	-	$7227

teamdeck

Get in touch with us! Teamdeck

Our customer support team will be happy to answer your questions regarding our app. You can always drop us a line in the chat.

www.teamdeck.io

teamdeck