User Manual – Employee Timesheet

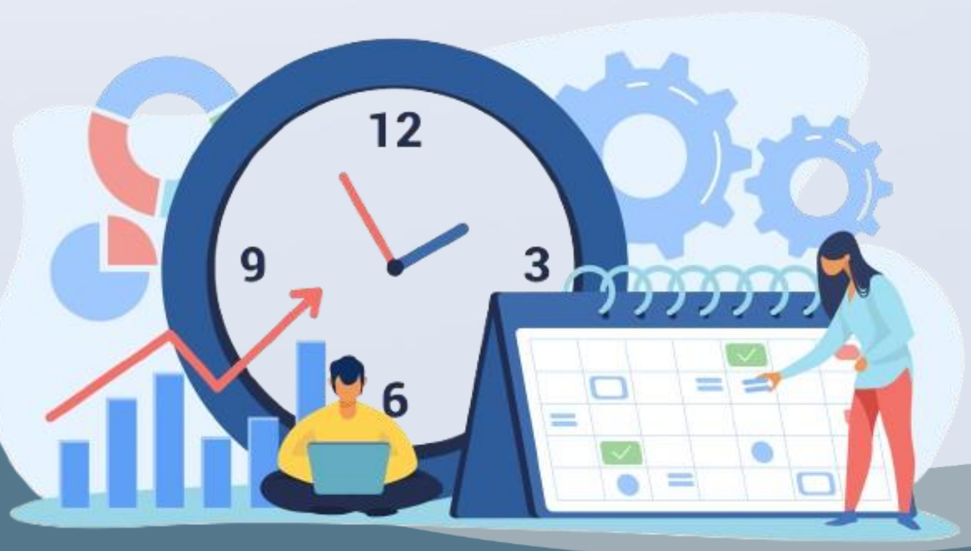

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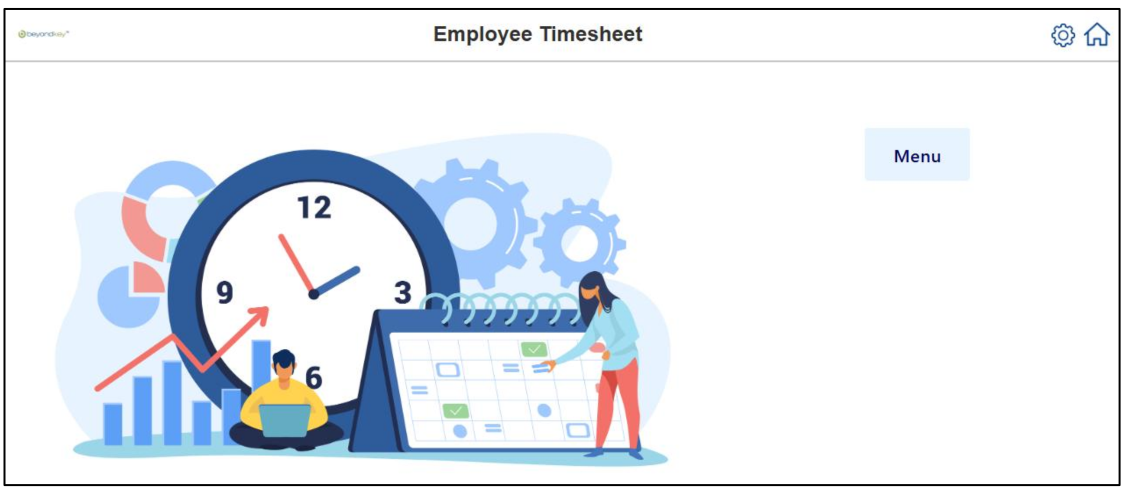
Table of Contents

1. Introduction

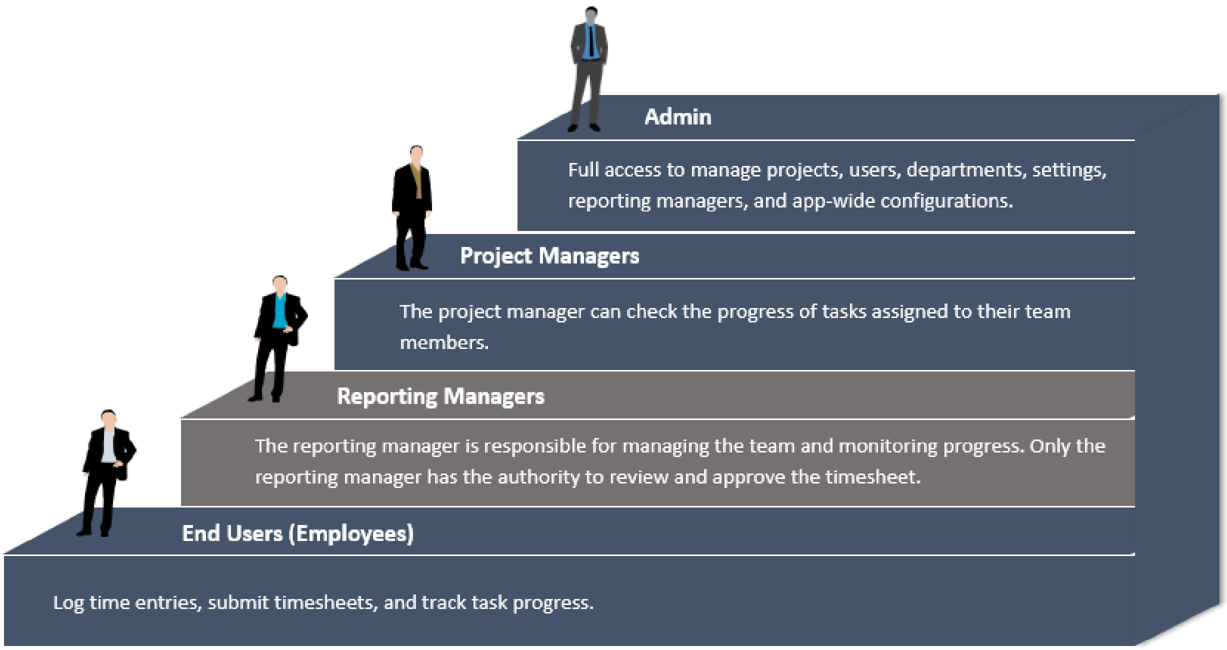
The Employee Timesheet Application is a user-friendly tool designed to help manage employee time, tasks, and projects efficiently. It allows employees to log their hours, track tasks, and submit timesheets for approval, all while ensuring data is entered correctly. The application has role-based access, meaning that different users like admins and employees can only access the features specific to their roles.

Key features include search and filter options to find tasks and projects easily, and dashboards that visually display project progress and time logs. Admins can manage settings and departments, while employees can track their time and monitor task status. The application is flexible, allowing for updates and changes as needed, making it an essential tool for managing time and improving productivity.



2. Roles & Key Features

Role-Based Access:



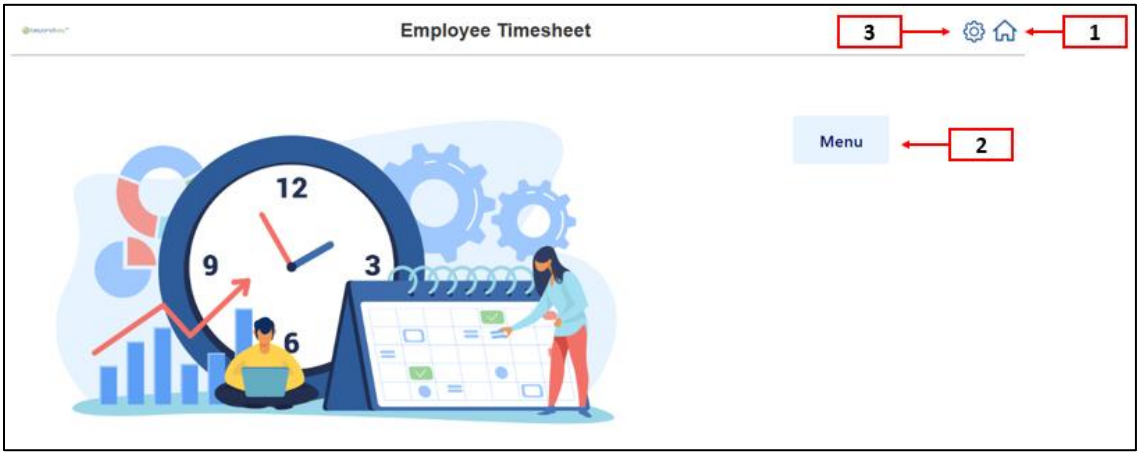
Key Features:

1. **Time Logs**
   Users can log time by selecting the projects and tasks underneath.
2. **Project Management**
   Create projects with details, filter, and search by criteria, and view progress and performance on the project dashboard.
3. **Task Management**
   Define and assign tasks with durations, track progress with statuses, and compare estimated vs. logged hours.
4. **Project Dashboard Navigation**
   View project details, analytics, team information, task statuses, and hour comparisons.

7. **Settings**
   Customize settings, assign admin & reporting manager, and handle department activation or deactivation.
6. **Timesheets**
   Employees can submit timesheets, track approval status, and view detailed records of approved, pending, and rejected entries.
5. **User Role Restrictions**
   Admin has full access and reporting manager manages the projects and timesheet. The project manager and end users have limited Access.

3. Home

On the Home page, the admin has access to three tabs: "Home," "Menu," and "Settings." For end users, the "Settings" option will not be visible.



Home:

The home icon will take you to the application homepage.

Menu:

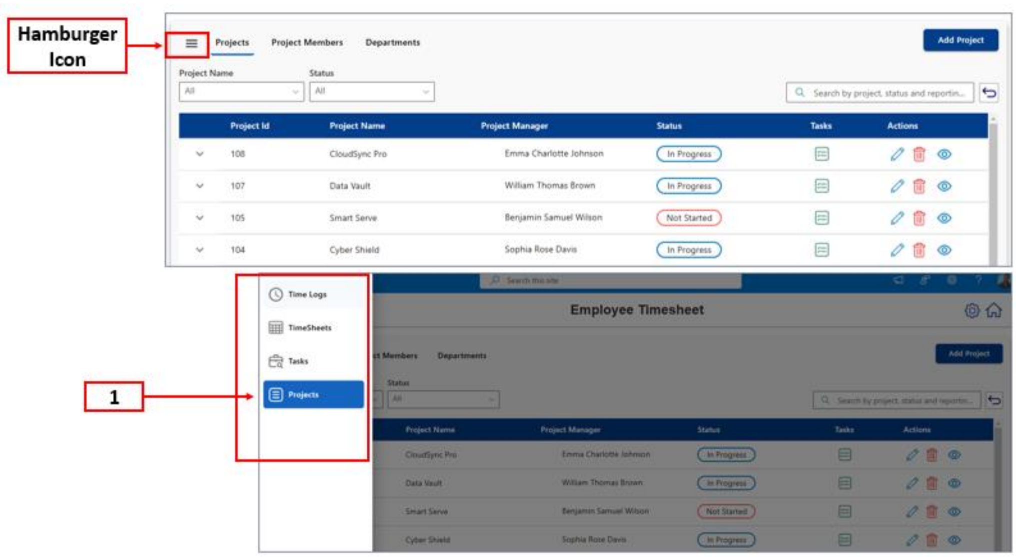
Clicking on this button redirects you to the project module page, where you can access several options. On the left side, you will find the Hamburger Icon, which opens a menu containing Time Logs, Timesheets, Tasks, and Projects.

Settings:

The settings icon is intended for administrators to manage and configure both general and departmental settings within the application.

4. Menu

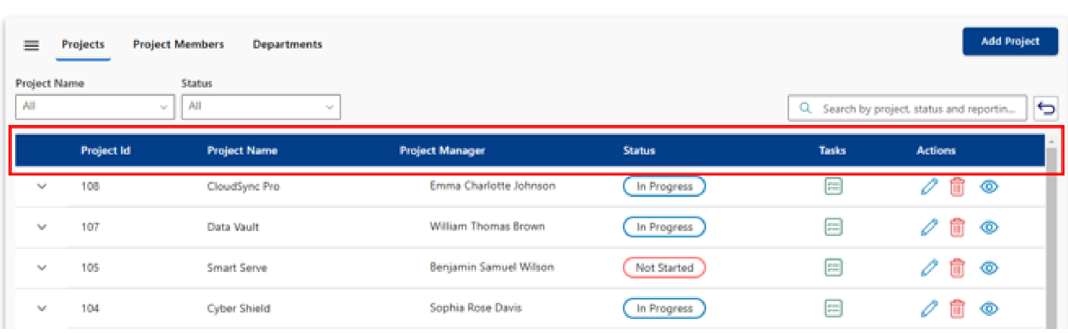
Clicking the Menu button redirects you to the Project module, where the first tab displays the "Projects" section. To navigate to other modules, use the Hamburger Icon located at the top-left corner. Upon clicking it, you will find the navigation options for additional modules. As shown in the below image:



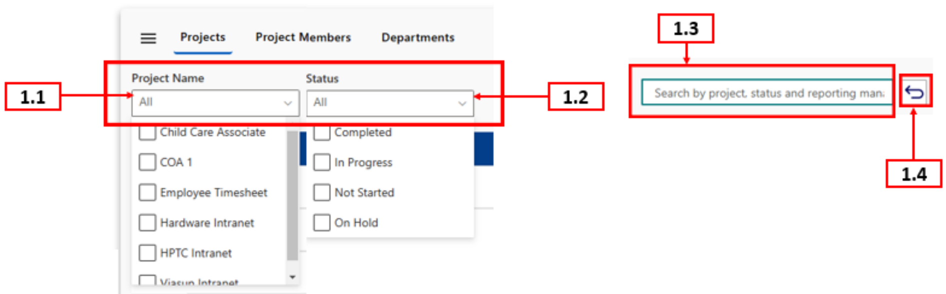
Projects Module

Projects Section

The projects section offers filters and a free-text search feature to help narrow down results and manage projects efficiently. A grid displays key details such as Project ID, Name, Manager, Status, Tasks, and Actions, allowing users to easily edit, delete, and view projects, as well as manage tasks. As shown in the below image:



The projects section features search filters that allow users to efficiently narrow down results and view specific projects and tasks. As shown in the below image:



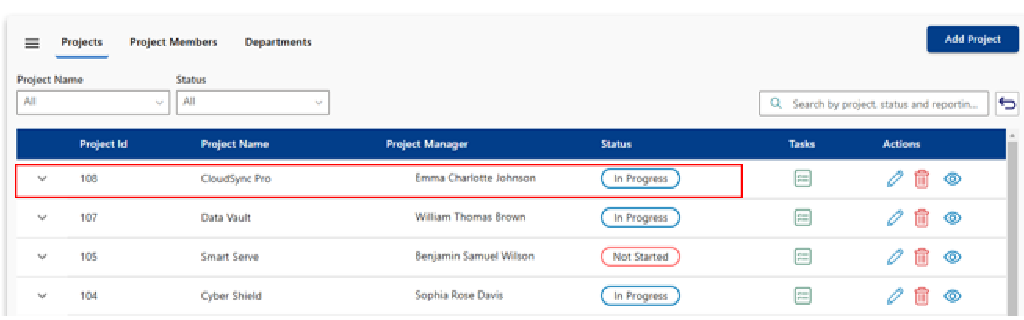
1.1 Project Name Dropdown: Displays projects that are assigned to the logged-in user. Users can select any project to filter and view specific tasks related to that project.

1.2 Status Dropdown: Offers filter options such as Completed, In Progress, Not Started, and On Hold, enabling users to drill down further and view tasks based on their specific status.

1.3 Search Bar: In addition to the dropdown filters, a search bar is available to quickly retrieve project details.

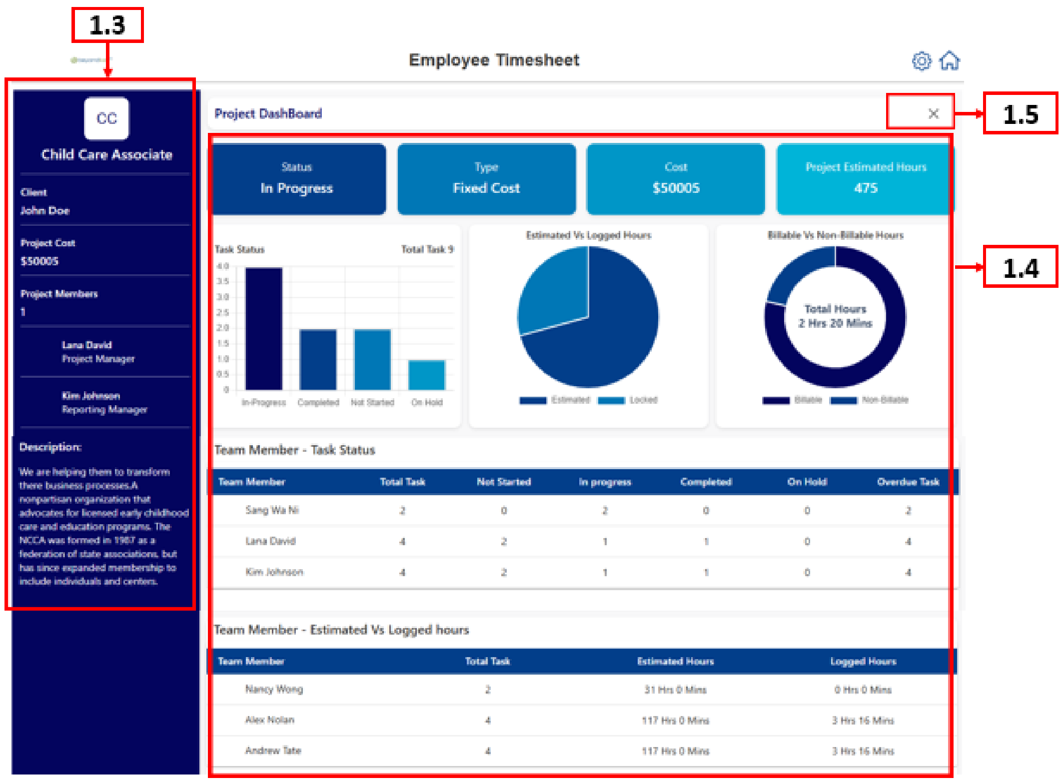
1.4 Back Icon: Clicking on this icon allows you to exit the search bar options and return to the previous view.

Clicking on the Project ID, Project Name, Project Manager, or Status will redirect you to the Project Dashboard. As shown in the below image:



Project Dashboard:

The project dashboard offers a centralized view of project metrics, enabling efficient tracking of client details, project costs, team contributions, and task progress. With visual insights through charts and detailed tables, it ensures streamlined monitoring of estimated vs. logged hours, task statuses, and overall project performance. As shown in the below image:



1.3 **Employee Timesheet Section:** Information such as Client Name, Project Cost, and a list of Project Members.

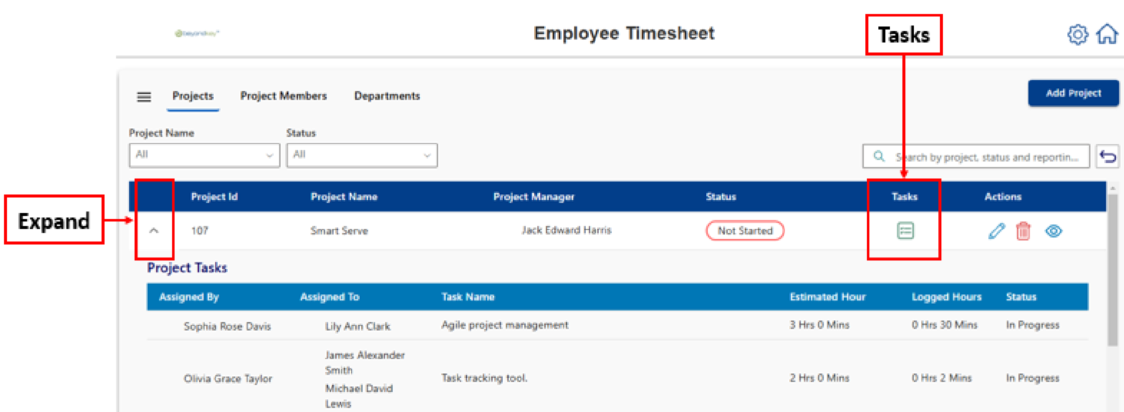
1.4 Project Dashboard (Charts):

- Cards showing status, type, cost, and estimated hours for the project.
- Stacked Bar Chart depicting task status.
- Pie Chart comparing estimated vs. logged hours, and billable vs. non-billable hours.
- A table listing Team Members' Task Status (e.g., Not Started, In Progress, Completed, On Hold, Overdue).
- A table for Estimated vs. Logged Hours, showing data for each team member, including Total Tasks, Estimated Hours, and Logged Hours.

1.5 Cancel Icon: A cancel icon at the top of the page allows you to return to the main table.

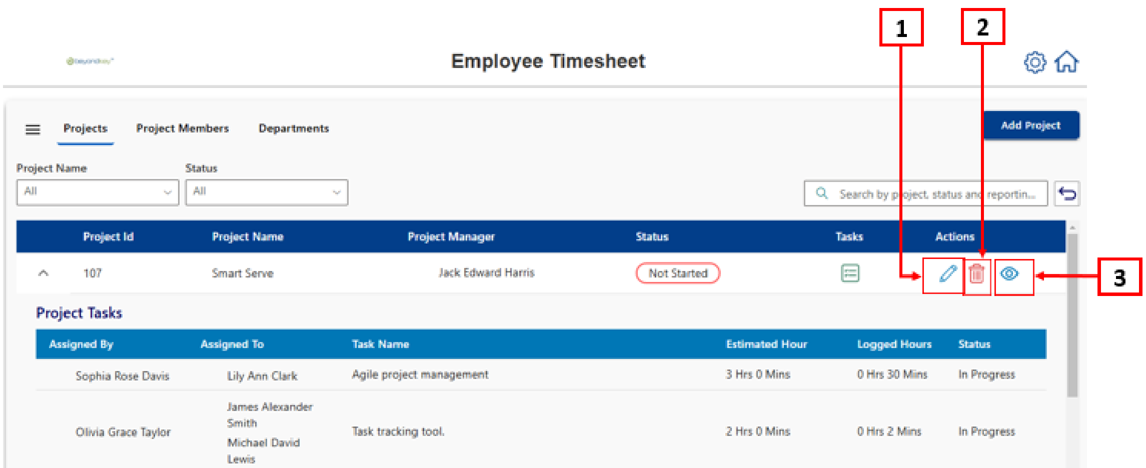
Tasks Icon:

Clicking on the tasks icon will display detailed information about project tasks, including the person who assigned the task, the individual to whom it was assigned, the task name, estimated hours, logged hours, and the status. The expand icon also displays the same details of the project tasks. As shown in the below image:



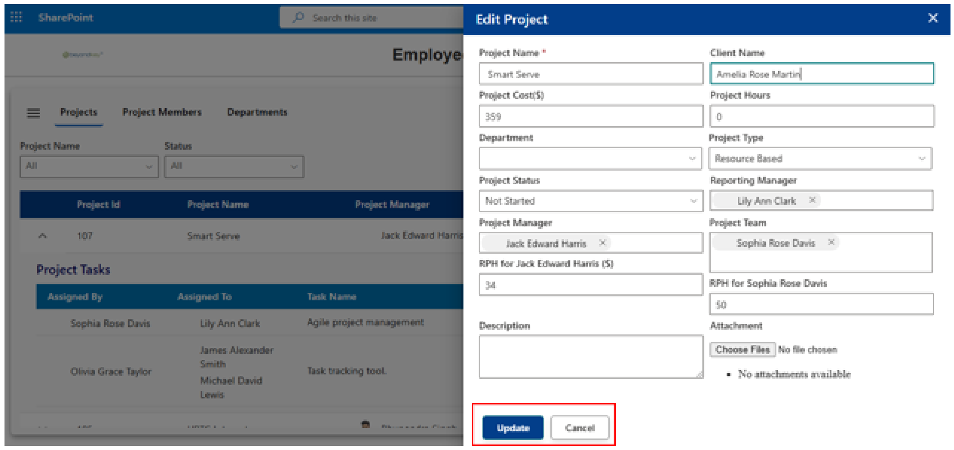
Actions:

Three action options are available for each project. These action icons are displayed based on the user's role in the system. for instance, the Reporting Manager has permission to edit and delete, while the Project Manager and End User can only view project details. The grid will show tasks according to the logged-in user's permissions - End Users will only see tasks assigned to them, while Project Managers and Reporting Managers can view all tasks associated with the project. As shown in the below image:



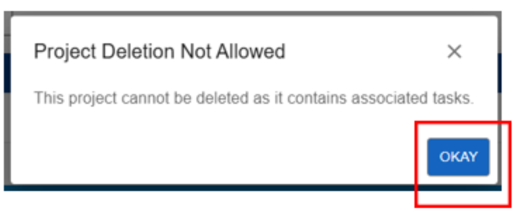
1. **Edit Icon:** This option allows you to update project details. Upon clicking, you can edit various fields, such as the project name, client name, project cost, project hours, department, and project type (with dropdown options like Resource-Based or Fixed Cost). You can also update the project status (options include Not Started, In Progress, Completed, or On Hold), reporting manager, project manager, project team, RPH for the project manager and team, as well as the description and attachments. After making the desired changes, click update to save or cancel to discard them.

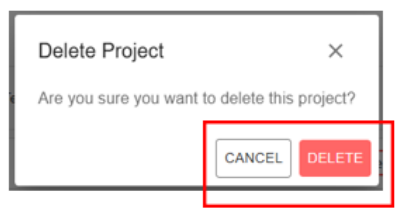
As shown in the below image:



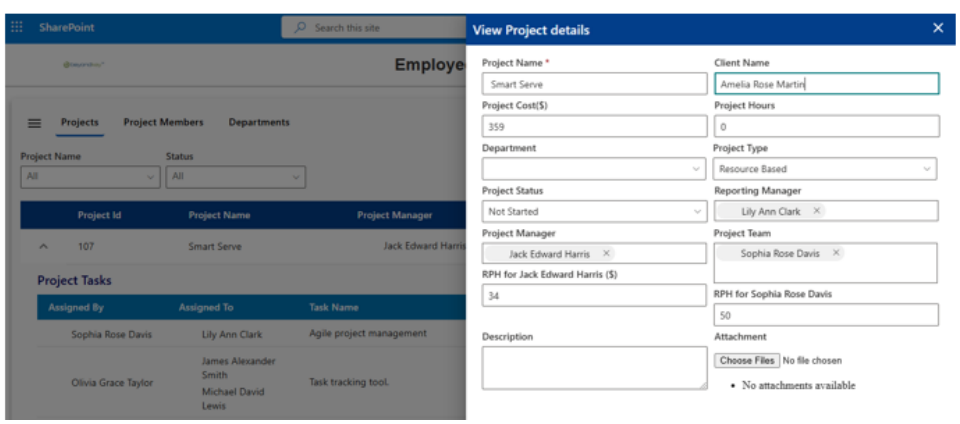
2. **Delete Icon:** Clicking on the delete icon shows two options:

- If the project has associated tasks, you cannot delete it.
- If the project has no associated task, you can delete it. To confirm you will have to click on the okay button, or you can cancel the action. (As shown in the below images)



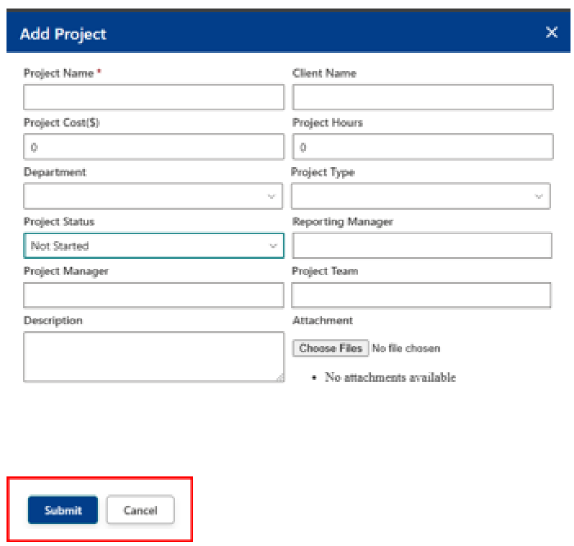


3. **View Icon:** Clicking on the view icon displays the details filled in through the edit button without any further editing. As shown in the below image:



Add Project Button:

The "Add Project" button is visible only to the Admin and Reporting Manager. When clicked, it opens a form with several fields to be filled in, including project name, client name, project cost, project hours, department, project type (Fixed Cost or Resource-Based), project status (Not Started, In Progress, Completed, On Hold), reporting manager, project manager, project team, description, and a file upload option for attachments. The form also contains submit and cancel buttons to either save or discard the entered details. As shown in the below image:



Project Members Section

Clicking on the project members section displays details of the project members. As shown in the below images:

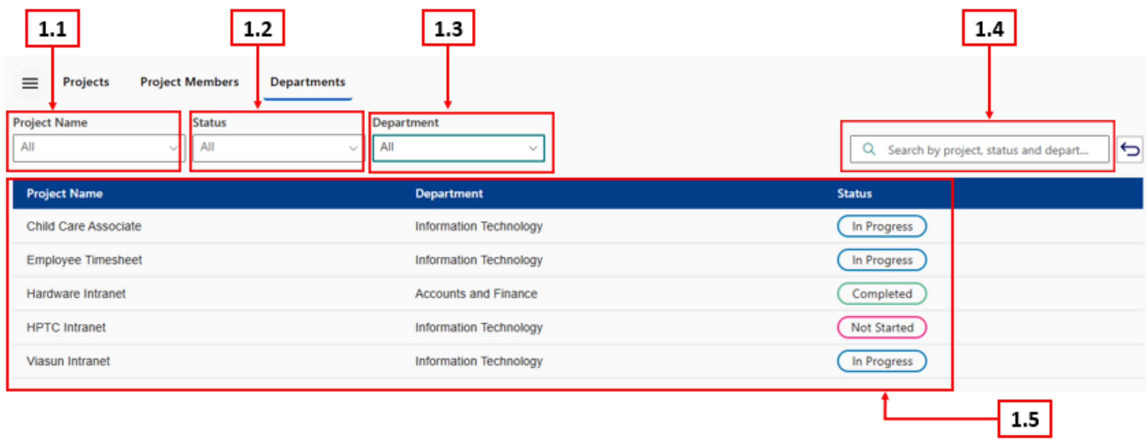
1.1 Project Name Dropdown: To see members associated with a specific project.

1.2 Search Bar: To view details of a particular employee by their name.

1.3 Member Details: The project member page shows details such as the member's image, name, title, and hourly rate. The hourly rate field is only visible for resource-based projects. For fixed-cost projects, this field will not be displayed.

Departments Section

This section is visible only to Admins. When clicked, the department section displays three dropdown options to choose from, as shown in the images below:



1.1 Project Name Dropdown: To see members associated with a specific project.

1.2 Status Dropdown: To view the status of the project, click on the status dropdown to see options like Completed, In Progress, Not Started, and On Hold.

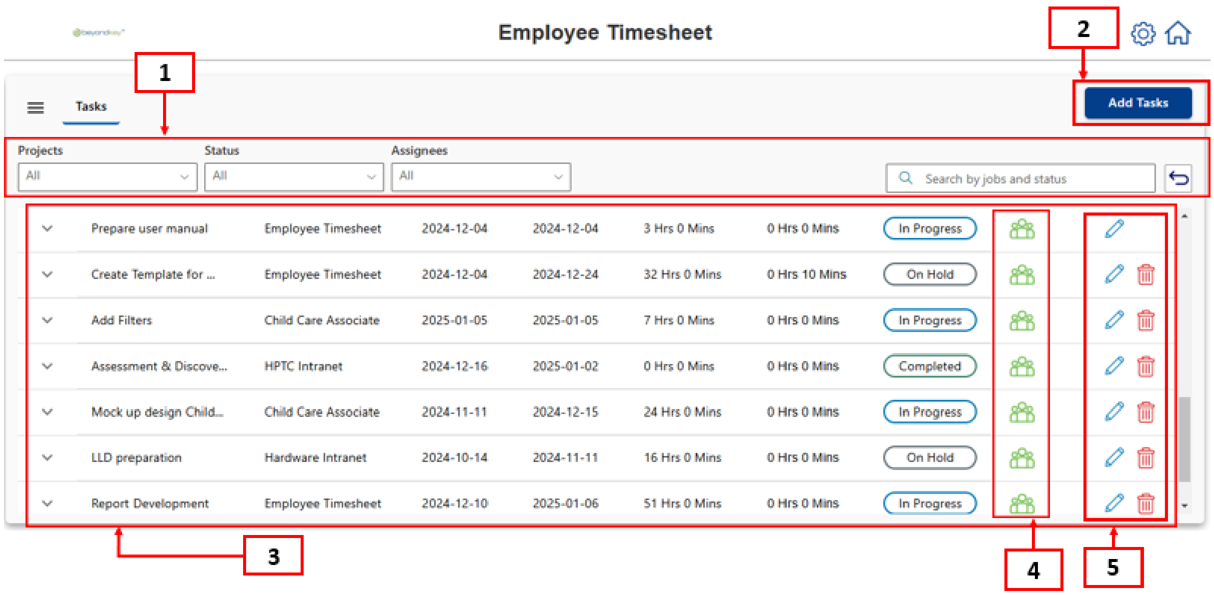
1.3 Department Dropdown: To filter projects by department, simply select the dropdown button.

1.4 Search Bar: A search bar allows you to filter by project, status, and department name.

1.5 Grid: The grid on this page displays the Project Name, Department, and Status details.

Tasks Module

The tasks module provides a comprehensive overview and management options for tasks within the application. As shown in the below image:

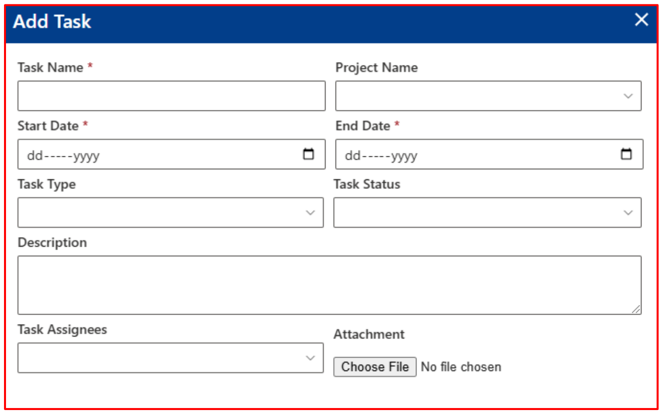


Below is a detailed breakdown of its features:

1. **Selection Dropdowns and Search Bar**
    - **Projects Dropdown:** By clicking on the dropdown, you can select the project for which you want to see the task details.
    - **Status Dropdown:** By clicking on the dropdown, you can select the status such as Completed, In Progress, Not Started, or On Hold. for which you want to see the task details.
    - **Assignees Dropdown:** By clicking on the dropdown, you can select assignees for which you want to see the task details.
    - **Search Bar:** By clicking on this field, you can see task details by specific job titles or statuses.

2. Add Task Button

The "Add Task" button opens a form where you can enter task details. These include the task name, associated project, start and end dates, task type (Billable or Non-Billable), and task status (Not Started, In Progress, Completed, or On Hold). You can also provide a description, select assignees from a dropdown list, and upload relevant attachments in supported formats. As shown in the below image:



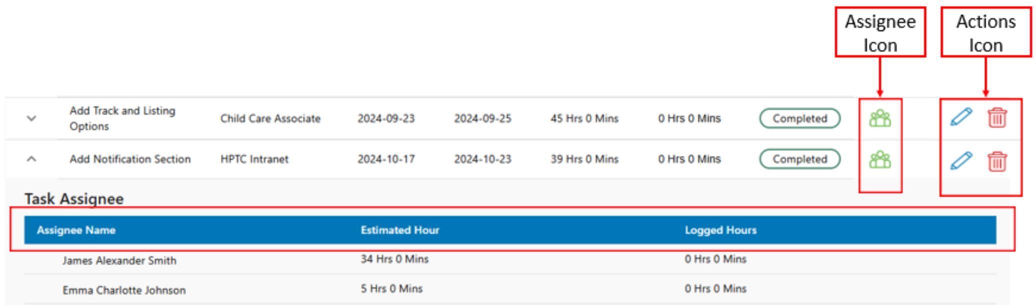
Once all the information is filled out, click the update button to save the task. If you wish to discard the form without saving changes, you can use the cancel button. As shown in the below image:

3. Task Details Grid

A grid displays task details, including Task Name, Project, Start, and End Dates, Estimated and Logged Hours, Status, Assignee(s), and available Actions.

4. Assignee Icon

Clicking on the Assignee Icon or Expand icon shows detailed information, including the Assignee Name, Estimated Hours, and Logged Hours. As shown in the below image:



5. Actions:

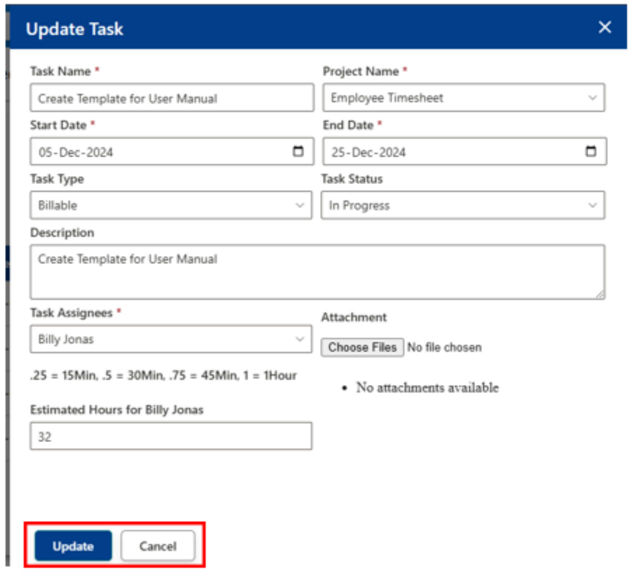
There are two primary options in task actions: edit and delete. The edit option allows for updating, while the delete option allows for removing a task entry.

Any logged-in user (End User, Admin, Reporting Manager, or Project Manager) can edit all details or delete a task if they create it themselves. However, if someone else assigns the task, only the edit option will be visible, and the delete option will disappear. Furthermore, the edit option only allows updating the task status in such cases.

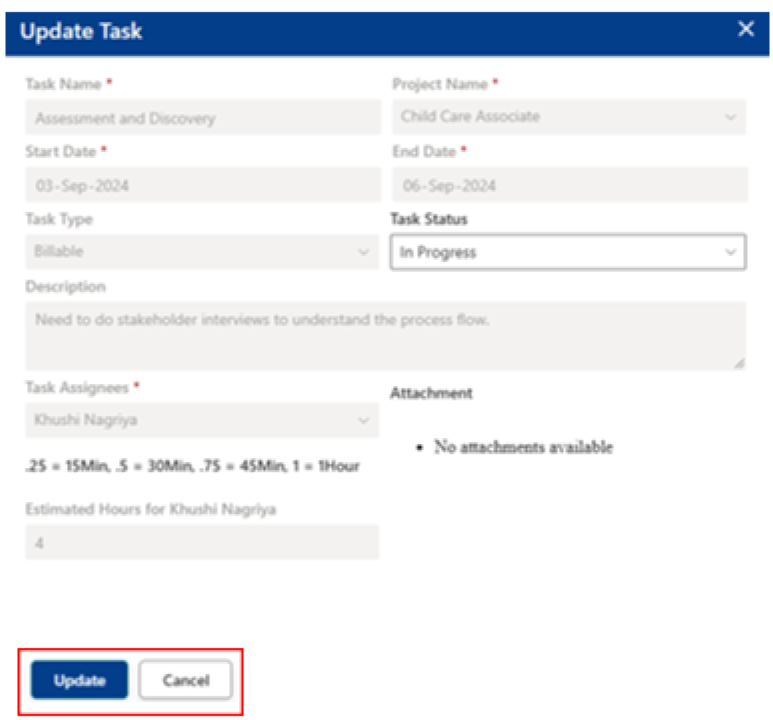
Admins can view tasks across all projects but cannot delete or modify tasks assigned by others. Reporting Managers can view all tasks related to their projects only, including tasks they created or those assigned by others.

1. **Edit Icon:** Clicking on the edit icon shows two options:

   - If a task is created by the logged-in user, this option allows them to update the task details. By selecting it, users can edit various fields such as the task name, project name, start date, end date, task type (dropdown options include Billable and Non-Billable), task status (e.g., Not Started, In Progress, Completed, or On Hold), and a description field for task-related notes. Users can also choose an assignee from a dropdown, attach files, and specify the estimated hours for the assignee. After making changes, click **Update** to save or **Cancel** to discard the modifications. As shown in the below image:

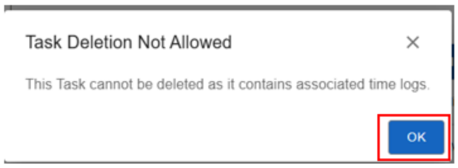


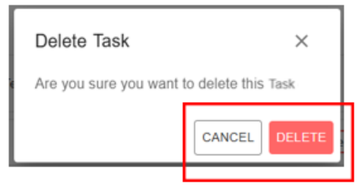
- If the task is assigned by someone else (Reporting Manager, or Project Manager), only the edit option will be available, while the delete option will disappear. Additionally, the edit option in this case will be limited to updating the task status only. After making changes, click **Update** to save or **Cancel** to discard the modifications.



2. **Delete Icon:** Clicking on the delete icon shows two options:

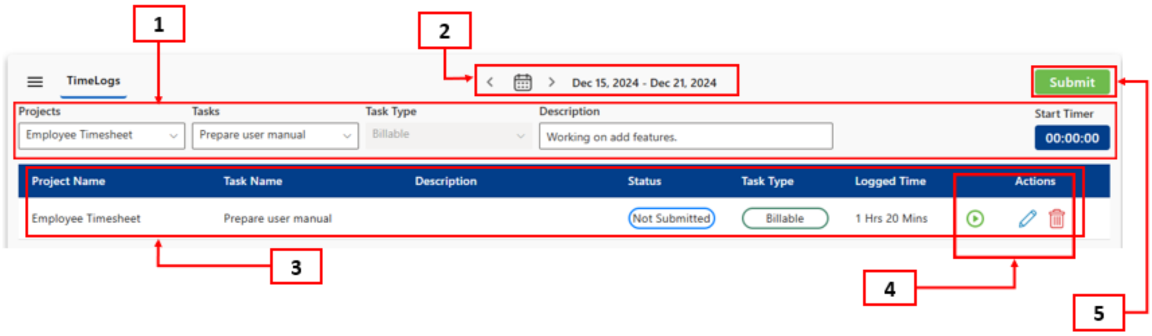
    - If the task has associated time logs, you cannot delete it.
    - If the task has no associated time logs, you can delete it. To confirm you will have to click on the okay button, or you can cancel the action. (As shown in the below images)





TimeLogs Module

The timelogs module comprehensively details the time logged for various tasks and projects. As shown in the below image:

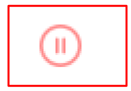


Here is an overview of its features and functionality:

1. **Dropdowns, Description Bar & Timer Feature:**
   - **Projects Dropdown:** By clicking on the dropdown, you can select the project for which you want to log time.
   - **Tasks Dropdown:** By clicking on the dropdown, you can choose the task you want to log time for.
   - **Task Type Dropdown:** This is an auto-updated (disable for entries) dropdown based on the selected project and task details, displaying the task type, such as Billable or Non-Billable.
   - **Description Bar:** By clicking on this field, you can add details about the task for easier identification.
   - **Start Timer:** The start timer feature lets you track time spent on a task before starting work. To use this feature, you must create a project first and then, its associated tasks. Once the project and task are set up, you can begin the timer by selecting the respective project and task.

- **Start Timer**: It initiates task timing, which can be stopped by clicking again. As shown in the below image:

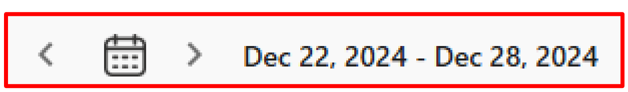
- **Pause Timer:** Users can pause the timer if they wish to take a break during the task by clicking on the pause icon.



- **Resume Timer:** Users can resume a task after a break by clicking the "Resume" button. The resume icon is visible only on the day the task was created, as shown below:

2. Calendar Range:

A weekly calendar range selector allows you to set a date range for submitting timesheet entries. The start-pause-stop timer option is available only for the current week's entries, not for past weeks, helping you efficiently manage and organize time entries. Use the forward and backward icons to view other week details. This feature ensures accurate tracking of work within specific periods, as shown in the image below:



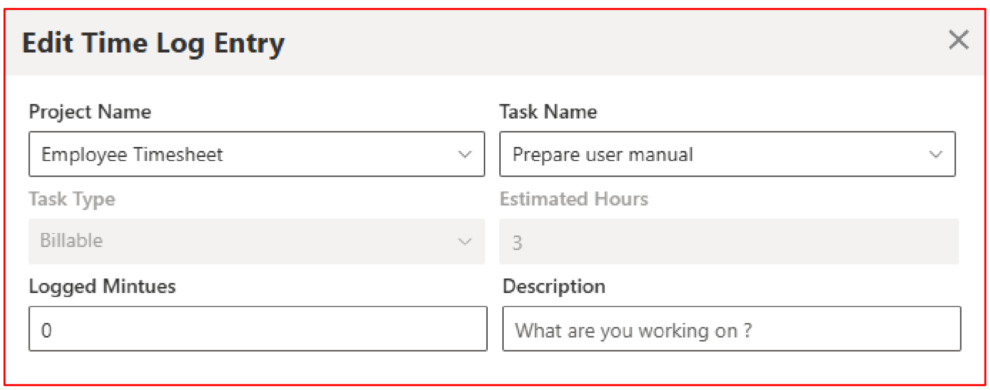
3. Details Grid:

The grid displays task information, including Project Name, Task Name, Description, Status, Task Type, Logged Time, and available Actions. As shown in the below image:

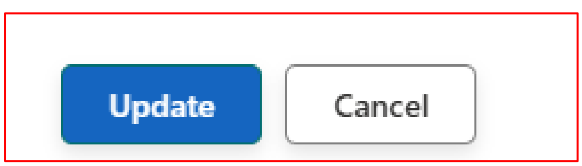
4. Actions:

- **Edit Time Log Entry**

  The edit option allows you to modify specific fields like Logged Minutes and Description. Project Name and Task Name are available as dropdowns, while Task Type and Estimated Hours remain non-editable. As shown in the below image:

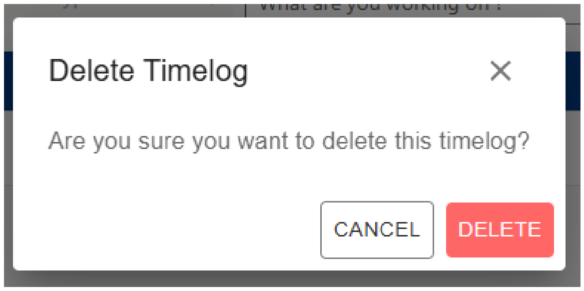


  Click **"Update"** to save changes or **"Cancel"** to discard them. As shown in the below image:



- **Delete Time Log Entry**

  The delete option removes the time log entry permanently. As shown in the below image:



5. Submit Button:

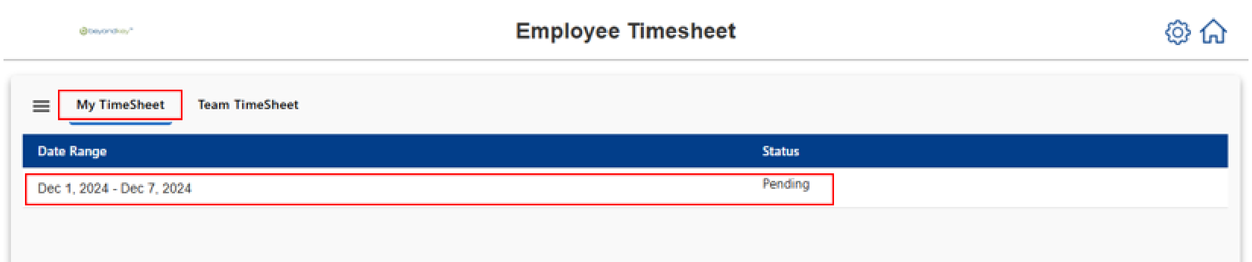
After completing the timelogs, click the submit button to send them for review.

Timesheet Module

The Timesheet module is designed to display the status of submitted timesheets, categorized as Approved, Pending, or Reject. Additionally, reporting managers have the authority to approve or reject timesheets submitted by the project team members, but only for the projects where they serve as the reporting manager.

My Timesheet Section

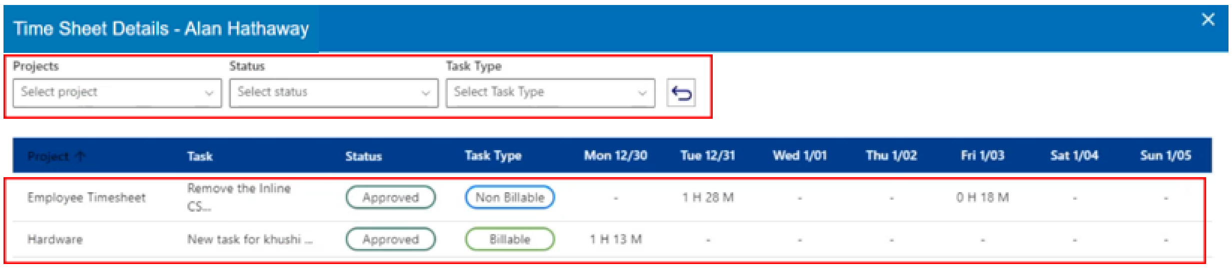
This section shows all your submitted timesheets, including their statuses and submission details. As shown in the below image:



Key Features:

- **Timesheet Status Categories:**
  - **Approved:** Timesheets that have been reviewed and approved.
  - **Pending:** Timesheets awaiting your review.
  - **Not Approved:** Timesheets that have been rejected.
- **Date Range Display:** Displays the weekly date range for each timesheet submission, providing details of the tasks submitted for that specific week.

In "My Timesheet", clicking on a date range navigates to the detailed timesheet page, where you can view the status details of the submitted timesheets, as shown in the image below:

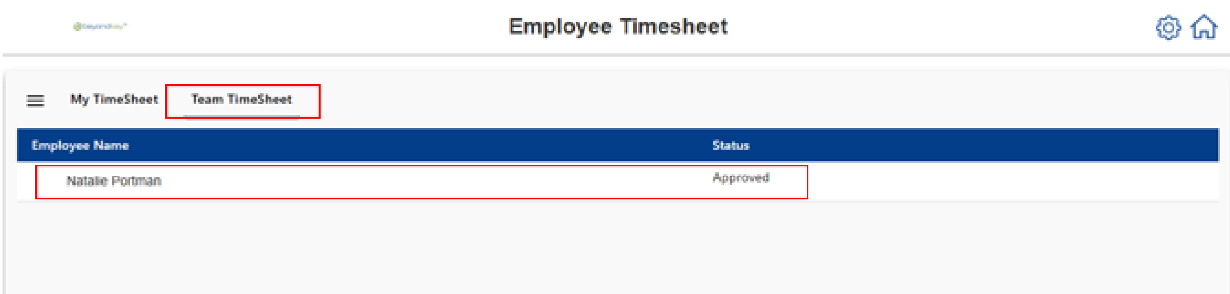


Options on the Details Timesheet Page:

- **Status Dropdown:** Filter tasks by status (Pending, Approved, or Rejected).
- **Task Type:** Filter tasks by type (Billable or Non-billable).
- **Back Button:** Return to the previous screen without changes.
- **Grid View:** The grid view shows the project name, task name, status, task type, and the timesheet submission dates for the specific week.

Team Timesheet Section

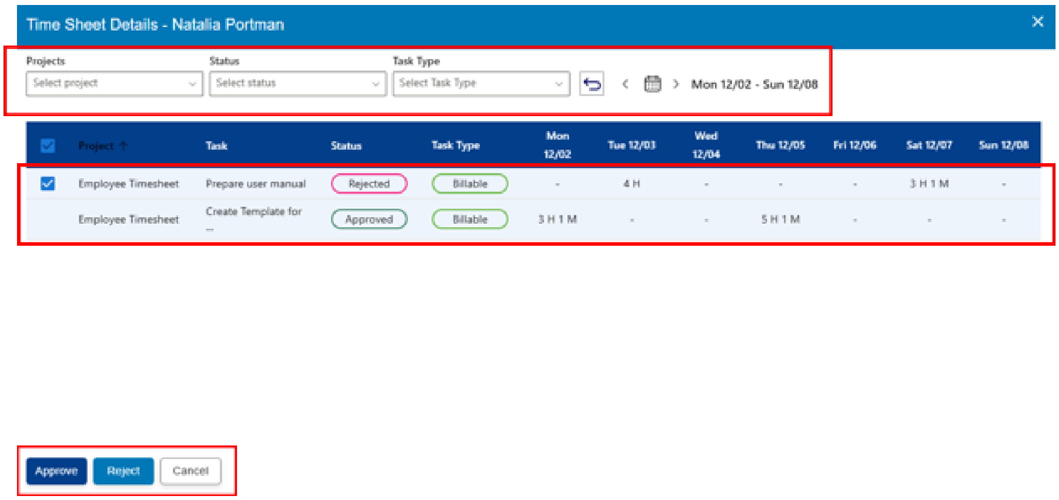
This section is only for Reporting Managers, enabling them to view and manage timesheets for their all-team members. It displays employee names and their timesheet statuses. As shown in the below image:



Key Features:

- **Timesheet Status Categories:**
    - **Approved:** Timesheets that have been reviewed and approved.
    - **Pending:** Timesheets awaiting your review.
    - **Not Approved:** Timesheets that have been rejected.
- **Date Range Display:** Displays the weekly date range for each timesheet submission, providing details of the tasks submitted for that specific week.

Clicking on an employee's name redirects you to their detailed timesheet page. As shown in the below image:



Options on the Details Timesheet Page:

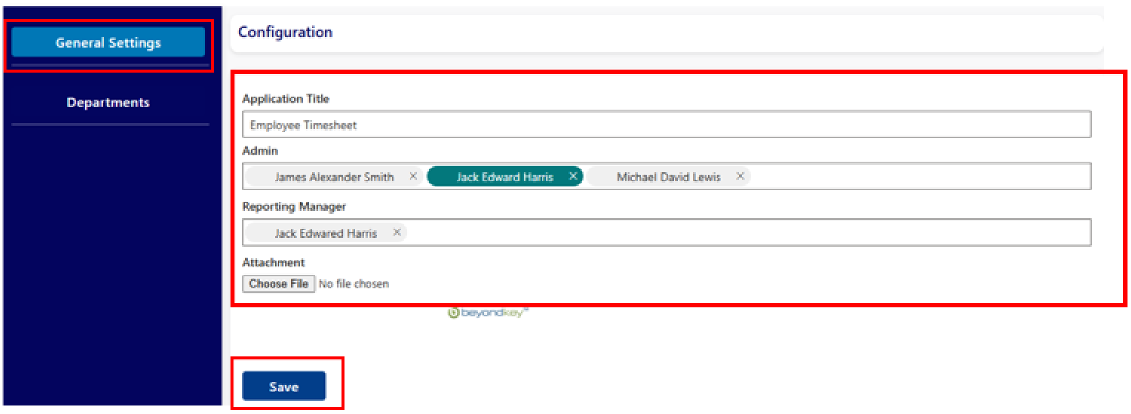
- **Status Dropdown:** Filter tasks by status (Pending, Approved, or Rejected).
- **Task Type:** Filter tasks by type (Billable or Non-billable).
- **Back Button:** Return to the previous screen without changes.
- **Grid View:** The grid view shows the project name, task name, status, task type, and a weekly breakdown (Monday to Sunday). Use the forward and backward icons to view other week details. A checkbox feature allows selecting rows for actions like approving, rejecting, or canceling to return to the main menu.
- **Actions Available:**
  - **Approve:** Approve the timesheet entries.
  - **Reject:** Reject the entries.
  - **Cancel:** Return to the previous screen.

5. Setting

The settings section is designed for administrators to configure and manage general and departmental settings within the application. Below are the details of each feature:

1. General Settings

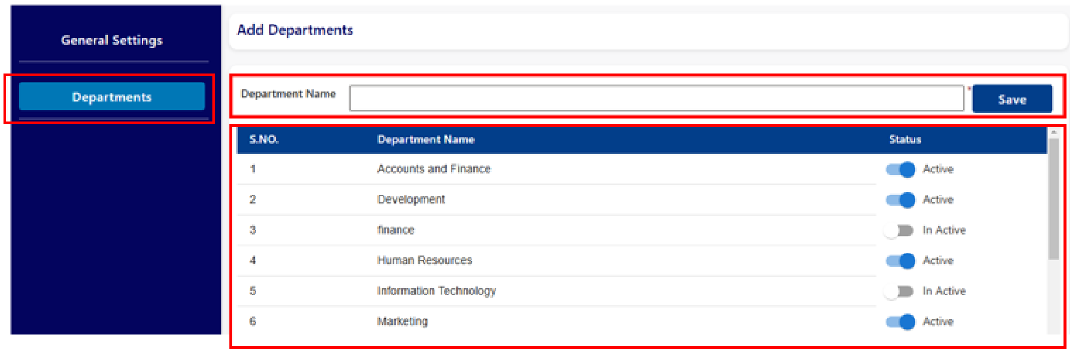
The general settings allow admins to configure application-wide settings. As shown in the below image:



- **Configuration Details**:
    - **Application Title**: Set the title for the Application.
    - **Admin Picker Bar**: Select users to assign as admin.
    - **Reporting Manager Picker Bar**: Select users to assign as reporting managers.
    - **Attachment Option**: Using the attachment option, you can upload an image or logo to display alongside the application title.
- **Save Button**: Click to save all the updated information.

2. Departments

The department section allows the creation and management of departmental information. As shown in the below image:



- The text field of the department name allows you to enter and save the name of a department. Once the details are saved, the newly added department will appear in the grid below.
- The grid displays the name of the newly added department and a status toggle button. The toggle lets you activate or deactivate the department as needed. The added department will appear in the project form.

6. FAQs for Employee Timesheet Application

1. What is the Employee Timesheet Application?

The Employee Timesheet Application simplifies time, task, and project management with role-based access for admins, managers, and employees. Key features include dashboards, search and filter options, and tools for logging hours, tracking tasks, and submitting timesheets. Flexible and user-friendly, it boosts productivity and ensures efficient time management.

2. How do I navigate the application?

- **Home Page:** Main navigation options.
- **Menu:** Access Projects, Time Logs, Timesheets, and Tasks.
- **Settings:** Admins configure application settings.

3. How do I create a new project?

Go to Projects > Add Project > Enter details (name, client, cost, team) > Save.

4. How do I create and assign tasks?

Go to Tasks > Create Task > Enter task details > Assign to team members.

5. How do I log time?

Go to Time Logs > Select project/task > Start timer or log time manually > Review logs.

6. How do I submit my timesheet?

Go to Time Logs > Add hours > Submit for approval > Track status (Pending, Approved, Not Approved).

7. How do I check timesheet status?

View the status (Pending, Approved, Not Approved) in the Timesheets section.

8. What visual tools are available?

The project dashboard offers a centralized view of project metrics, enabling efficient tracking of client details, project costs, team contributions, and task progress. With visual insights through charts and detailed tables, it ensures streamlined monitoring of estimated vs. logged hours, task statuses, and overall project performance.

9. How do admins manage settings?

Admins configure general settings, assign roles, and manage departments in the Settings section.

10. Can I edit or delete projects and tasks?

Yes, if you require role-based access then you can edit or delete projects and tasks as needed.

11. How does Role-Based Access Control work?

Roles such as Admin with full management access, Reporting Managers for reviewing and approving timesheets, Project Managers for tracking team task progress, and End Users for logging time, submitting timesheets, and monitoring tasks.

12. How is security maintained?

Role-Based Access Control ensures that users have access only to necessary features, protecting sensitive data.