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Timesheet Pro 365 – User Guide

Contents

Introduction

Welcome to the **Timesheet Pro 365 User Guide**. This comprehensive guide provides a step-by-step overview of how to install, configure, and effectively use the Timesheet Pro 365 application within the Microsoft 365 and SharePoint environments. It is designed to help administrators, managers, and employees efficiently manage and track timesheets, streamline project workflows, and boost productivity.

Inside this guide, you'll find detailed instructions on setting up the application, configuring key settings, and navigating the platform's core features. Whether you're an administrator setting up the system, a manager reviewing timesheet submissions, or an employee logging your hours, this guide will help you get the most out of Timesheet Pro 365.

By following the steps in this guide, you'll ensure a smooth deployment and maximize the application's value in enhancing time management and project tracking across your organization.

Version History

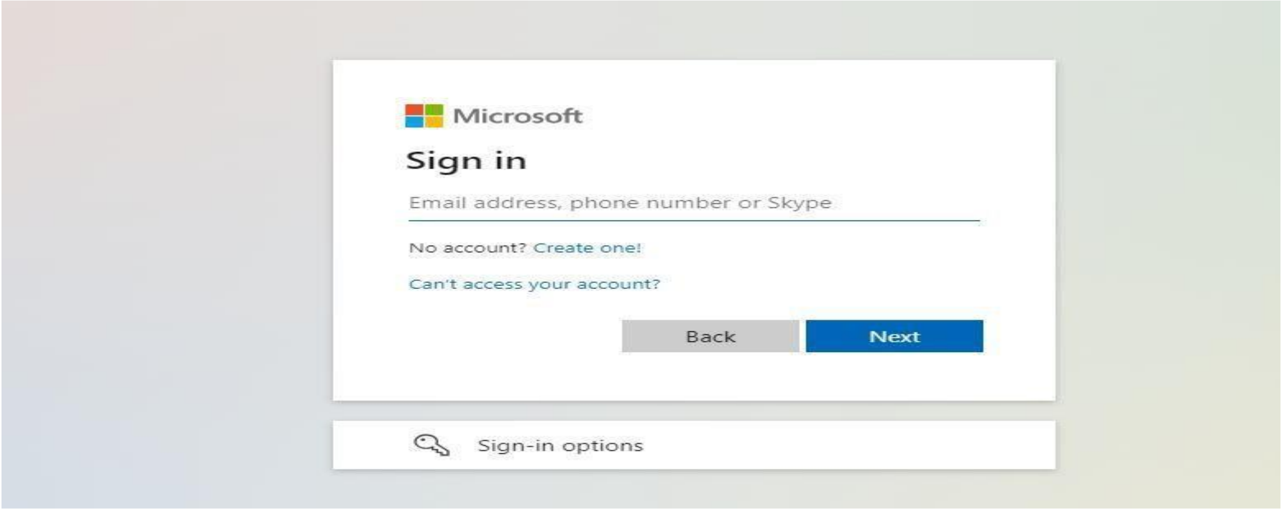
Version #	Date	Highlights
1.0	10/18/2024	This release includes the same features and functionalities as the old Office 365 Timesheet application.
1.1	02/20/2025	**Copy from Previous Timesheet:** Added a new **Copy to Previous Timesheet** feature, allowing users to easily copy data from a previous timesheet into a new one, improving efficiency in timesheet management.
1.2	01/13/2025	**Daily Timesheet Report:** Introduced a new report that provides a detailed daily breakdown of employee work hours, enabling better tracking and productivity analysis for admins and managers. **Minimum Daily Hours:** Added a configuration to enforce minimum daily work hours, ensuring policy compliance and alerting employees when their logged hours fall below the required threshold. **Employee/Manager Dashboard Update:** Added **Next** and **Previous** buttons to the right side of the bar graph, enabling seamless navigation between past and upcoming timesheets for easier access to historical data and future schedules.

1.3	01/13/2025	**Missing Report:** Introduced a feature for admins and managers to track missing timesheets, ensuring timely identification of submission gaps and better oversight of employee activities.
1.4	05/20/2025	**Email Notification for Missing Weekly Timesheets:** Admins and Managers can now send automated email reminders for missing timesheets from the past 3 months. Admins can notify Managers about their team's missing entries, while Managers can directly notify employees, helping ensure timely timesheet submissions. **Weekend Time Entry Settings:** A new option under Timesheet Settings allows admins to enable or disable time tracking on specific weekend days. Selected days become unavailable for entry in the New Timesheet module, providing organizations with improved control over weekend timesheet policies. **Holiday Calendar in General Settings:** A new "Holiday Calendar" tab has been added under General Settings. Admins can add, edit, and delete holidays via a form linked to a SharePoint list. Holidays are shown in a Data Table and appear as tooltips on the Timesheet page to alert users when a selected date is a holiday. **User Management Access:** A toggle that controls managers' permissions in User Management. When disabled, managers can modify access for any admin or manager, posing security risks. When enabled, managers can only manage employees assigned to them, improving security. Managers can still add new employees regardless of the toggle setting. **Bulk Delete:** A new feature allows selecting and deleting multiple records at once with a confirmation prompt for safety. This is implemented in Employee Management, Project Management, Permission Reports, and Timesheet modules.

Login to Microsoft 365 or SharePoint

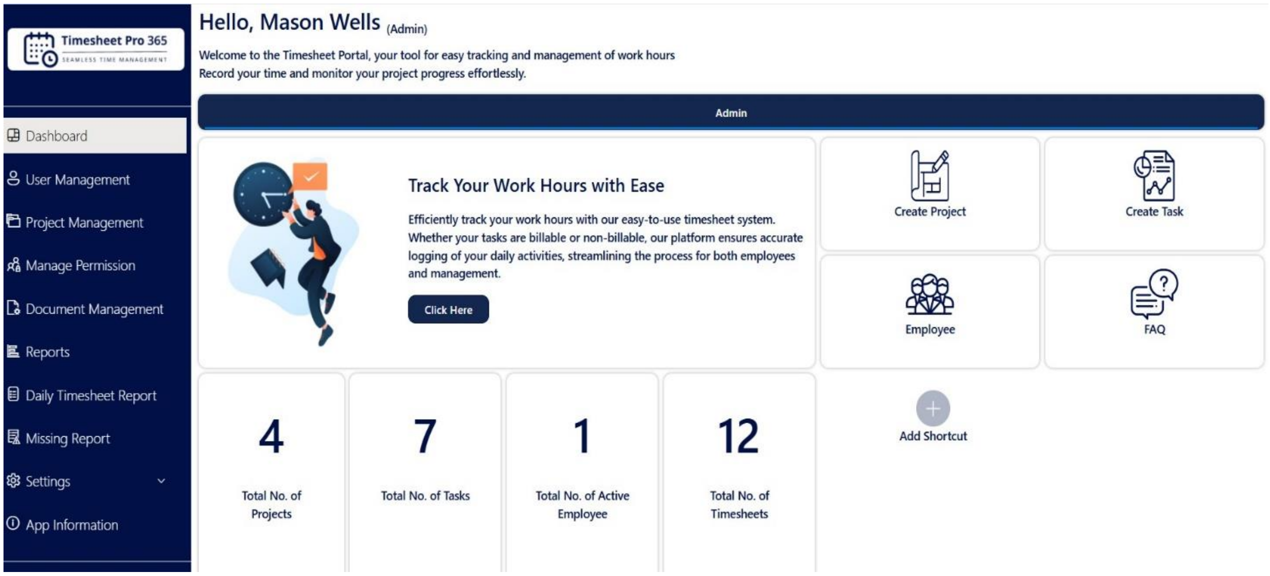
1. Navigate to the Microsoft 365 login page using the URL: https://www.office.com/

2. Ensure that the user is logged into the Microsoft 365 environment with their credentials.



3. Opening the SharePoint Site: Enter the URL of the SharePoint site in the web browser's address bar to access the site.

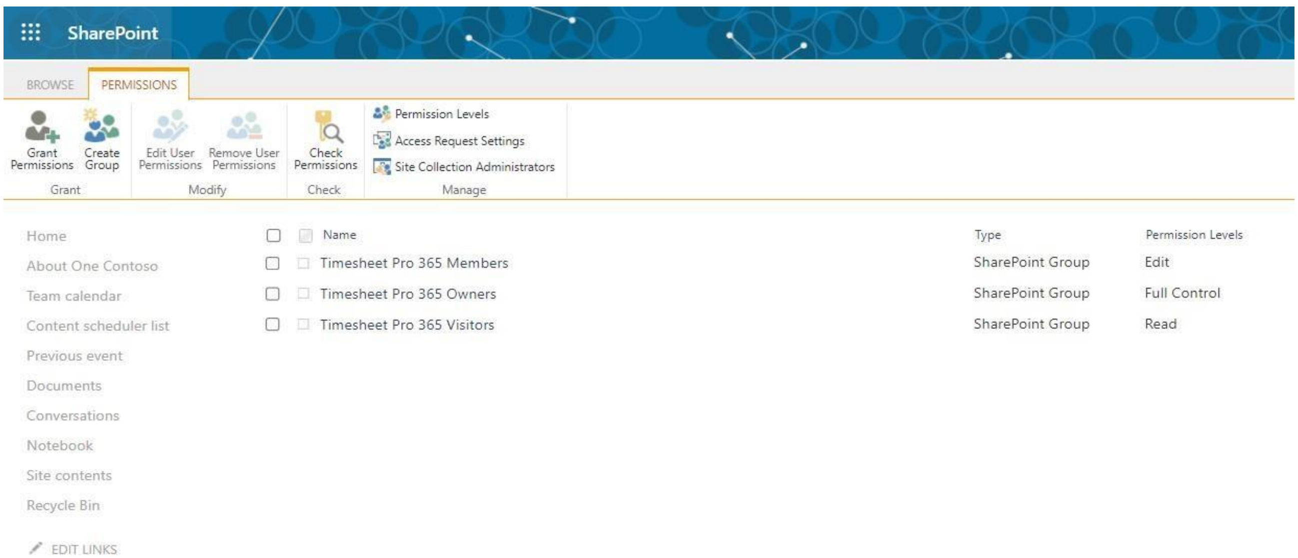
4. Open your SharePoint site where you have installed the Timesheet Pro 365 application.

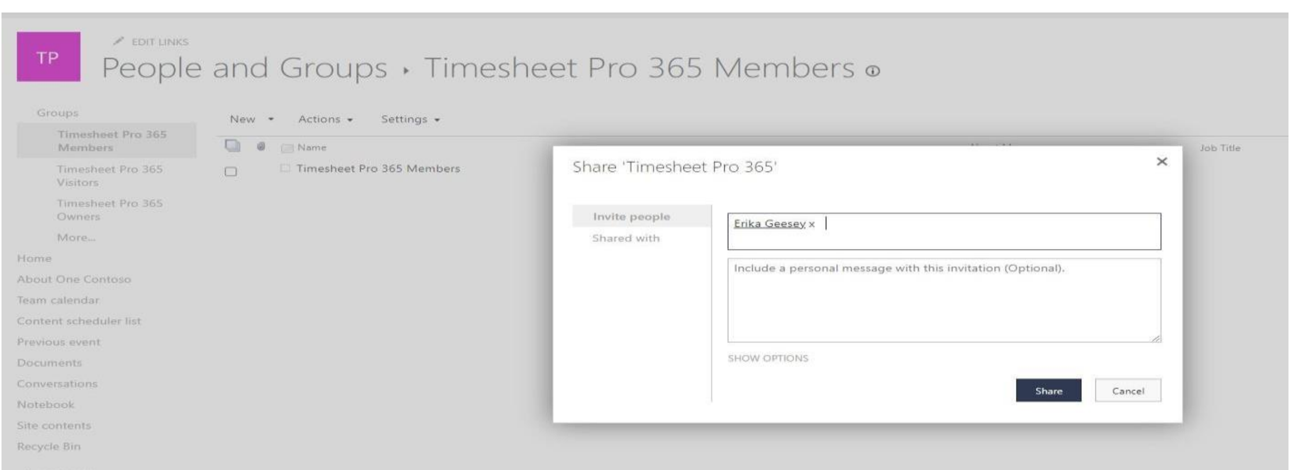


User Permissions for Site Access

All users accessing **Timesheet Pro 365** must have **Edit** and **Contribute** permissions. To grant these permissions to users or groups, follow the steps below:

1. Click the **Settings** icon (⚙) in the top-right corner of the SharePoint site.
   → A right sidebar will open.
2. In the sidebar, select **Site Permissions**.
3. Under the **Members** section, click on the relevant group (e.g., *Timesheet Pro 365 Members*).
4. Click **New** to add users.
5. Enter the email addresses of the users or groups you want to grant access to.
6. Click **Share** or **Add** to confirm.

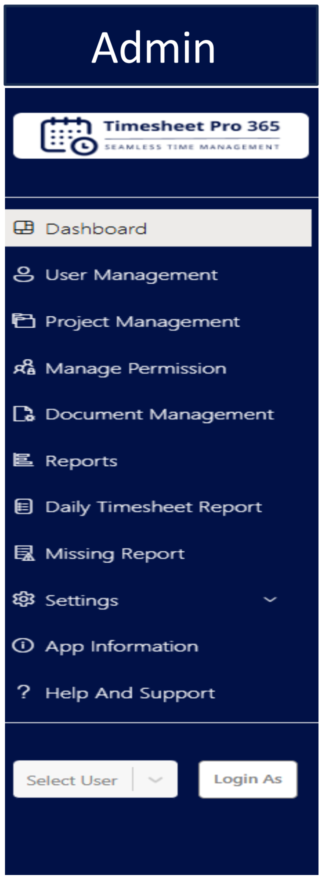


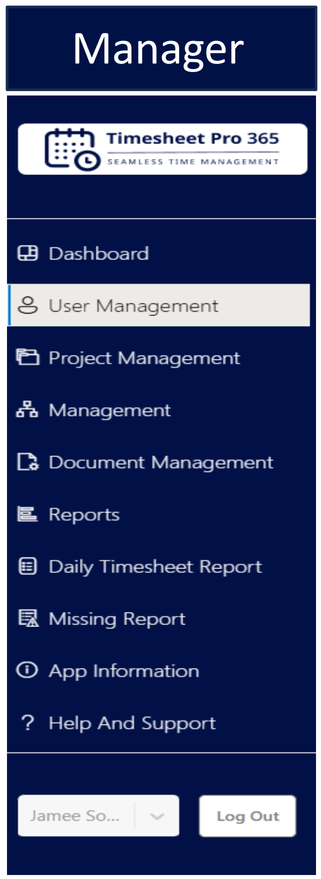


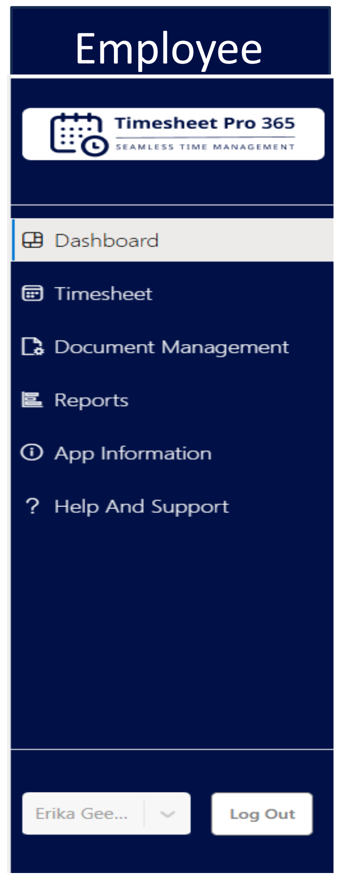
Role Based Navigation Bar

Overview

The **Role-Based Navigation Bar** in **Timesheet Pro 365** allows users to access different sections and functionalities depending on their assigned role.







Admin Navigation Bar

The **Admin** role has the most comprehensive access and can manage all aspects of Timesheet Pro 365. Below are the sections available in the **Admin** navigation bar:

- **Dashboard**: The main page where Admins can view overall system statistics and user activities.
- **User Management**: Allows Admins to manage user roles, permissions, and create new users.
- **Project Management**: Create, manage and assign projects and tasks.
- **Manage Permission**: Control user access levels and permissions within the application.
- **Document Management**: Upload, organize, and manage documents within the application.
- **Reports**: Access timesheet reports
- **Daily Timesheet Report**: View detailed timesheet data for specific employees on a daily basis.
- **Missing Report**: A report that highlights employees who have missed timesheet submissions.
- **Settings**: Manage application-wide settings like email setting, week-ending dates, etc.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

Manager Navigation Bar

The **Manager** role is slightly more limited than the Admin role but still has access to many important features, such as managing timesheets and viewing key reports. Below are the sections available in the **Manager** navigation bar:

- **Dashboard**: The main page where Managers can view overall system statistics and user activities.
- **User Management**: Allow managers to manage user roles and permissions and create new users.
- **Project Management**: Create and manage tasks and assign them to employees.
- **Document Management**: Only view documents which was uploaded by Admin.
- **Reports**: Access timesheet reports
- **Daily Timesheet Report**: View timesheet data on a daily basis for employees.
- **Missing Report**: View and manage employees' missing timesheet submissions.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

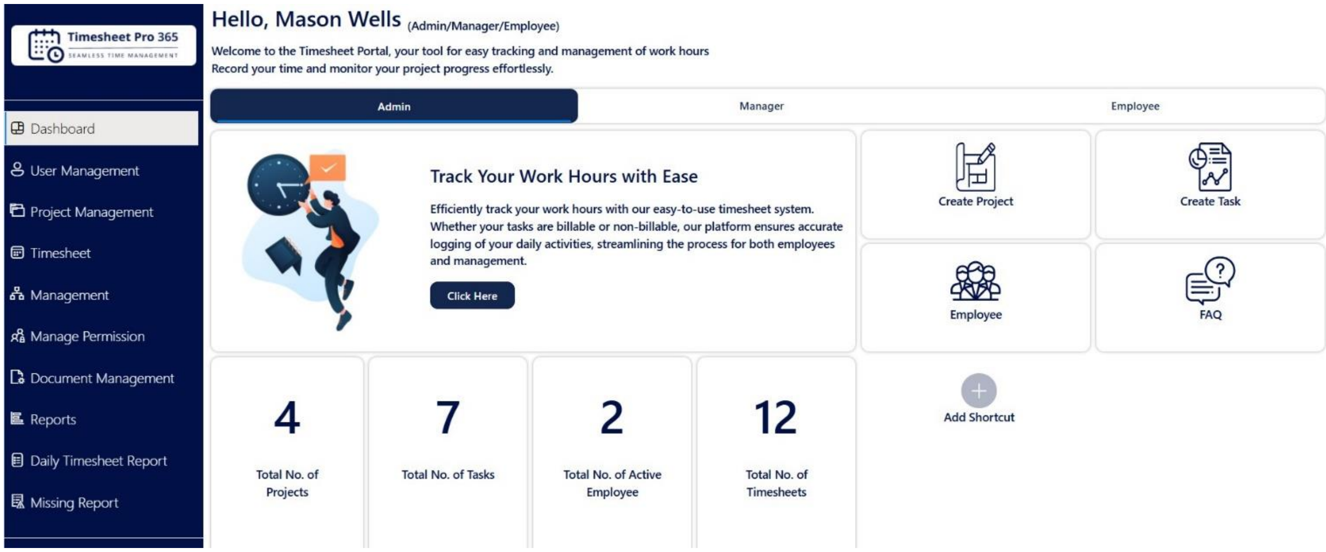
Employee Navigation Bar

The **Employee** role has the least access, with functionalities focused mainly on submitting and viewing timesheets. The available sections in the **Employee** navigation bar are:

- **Dashboard**: A quick overview of the employee's current timesheet data and performance.
- **Timesheet**: Submit, view, and manage personal timesheets.
- **Document Management**: Access documents uploaded by the admin.
- **Reports**: View personal timesheet reports.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

Handling Role Combinations

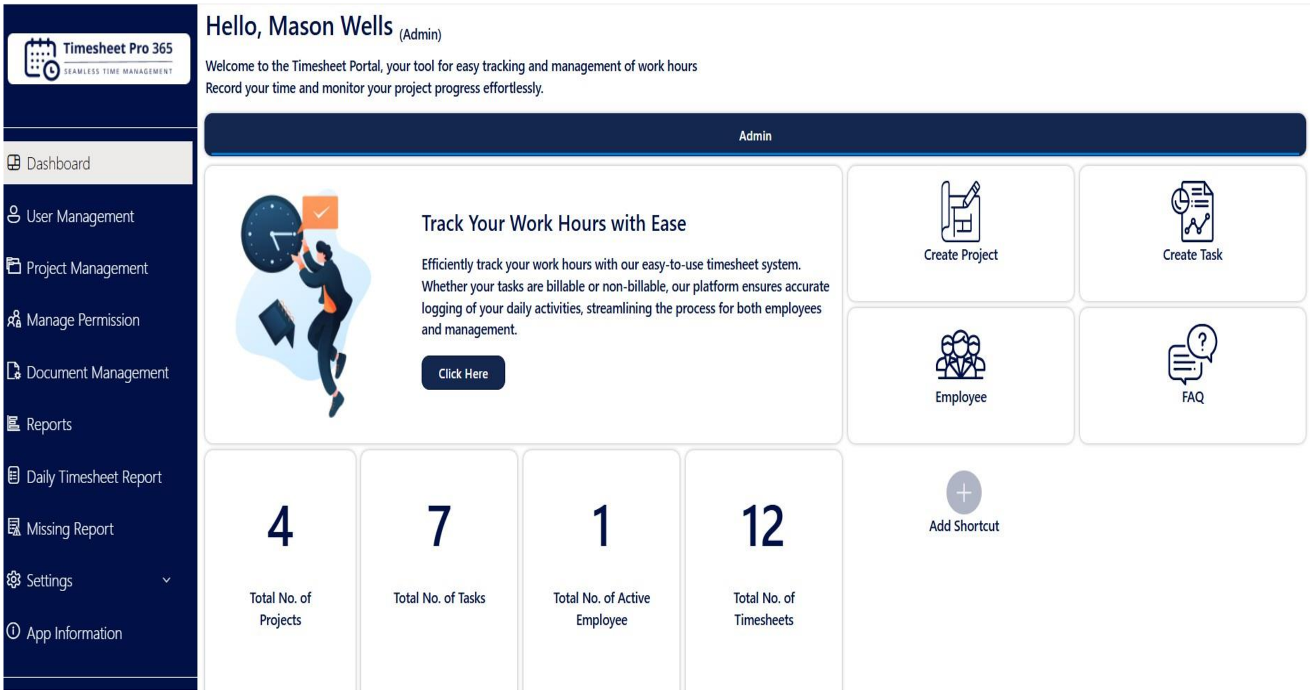
1. Set up the system to manage different role combinations, such as Admin/Manager/Employee, Admin/Manager, Admin/Employee, and Manager/Employee.



2. Ensure that users with multiple roles can access the correct features and navigation tabs based on their roles.

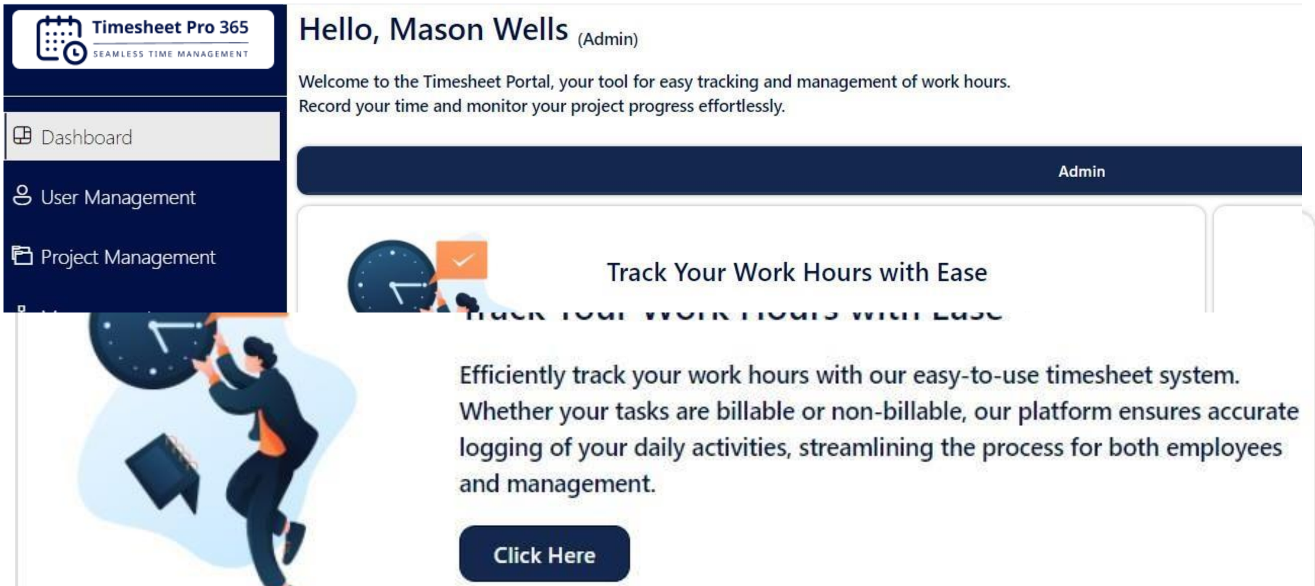
Dashboard

Admin Dashboard



Default Administrator Role

1. Initial installer becomes Timesheet Administrator, with full control over creating admins, managers, employees, and projects.
2. Display current user's name and role prominently upon login for clear identification.
3. Customize navigation tabs based on the user's role, showing the Admin tab for administrators.
4. **Click Here** button that links to the Ignatiuz official site for more services.



Cards

Cards View:

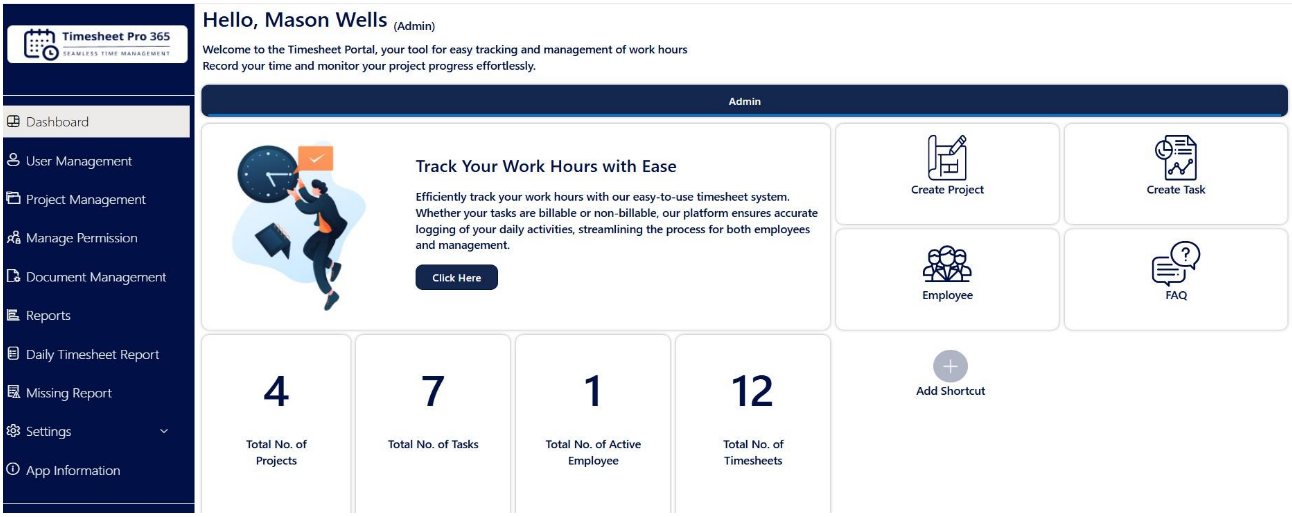
The **Dashboard Cards** provide a quick overview of key metrics within the Timesheet system. These cards help users monitor project and employee activity at a glance.

1. **Total Number of Projects:** The total count of projects created in the timesheet.

2. **Total Number of Tasks:** The total count of individual tasks or activities associated with projects in the timesheet.

3. **Total Number of Active Employees:** The total count of currently active employees.

4. **Total Number of Timesheets:** Total number of timesheets, recording hours worked on tasks or projects.



Add Shortcut

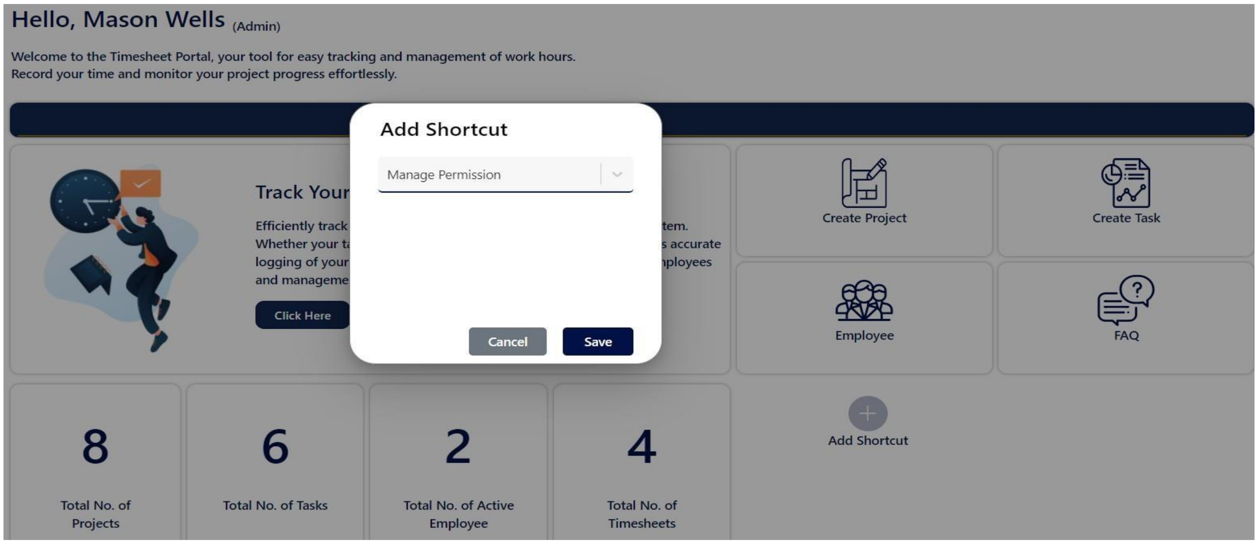
To enhance dashboard customization for administrators, we've introduced a new feature: Add Shortcut.

By default, the dashboard displays four cards: **Create Project**, **Create Task**, **Employee**, and **FAQ**. Each card allows you to navigate quickly to its respective tab.

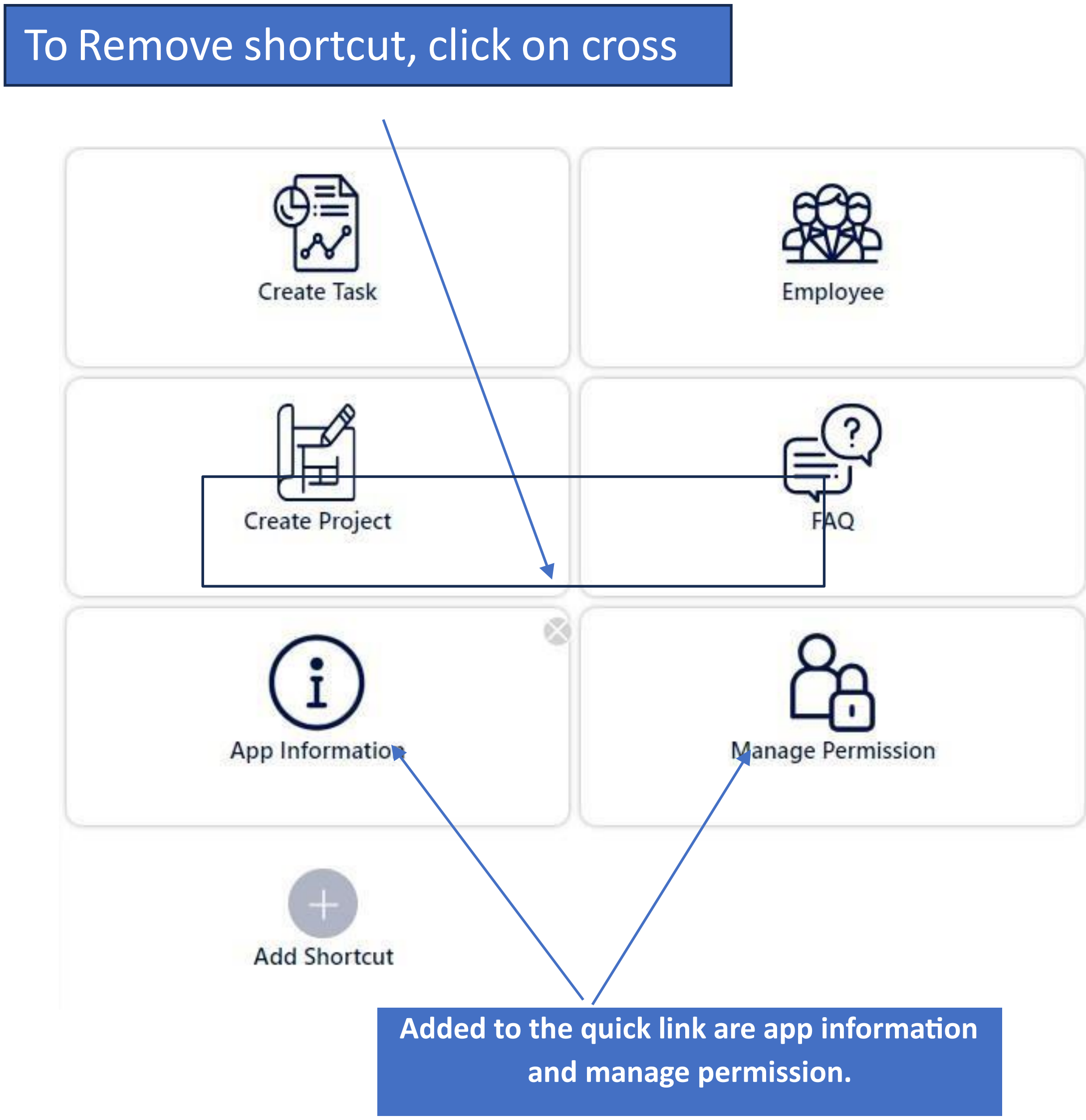
The Add Shortcut feature enables administrators to personalize their dashboard by adding additional cards for quick access to frequently used sections, streamlining daily workflows.

How to Use the Add Shortcut Feature:

1. Click the **"Add Shortcut"** button located at the bottom of the dashboard.
2. From the drop-down menu, select the desired quick link.
3. Click **"Save"** to confirm your selection.
4. The selected shortcut will now appear as a new card on your dashboard, allowing for easier and faster navigation.

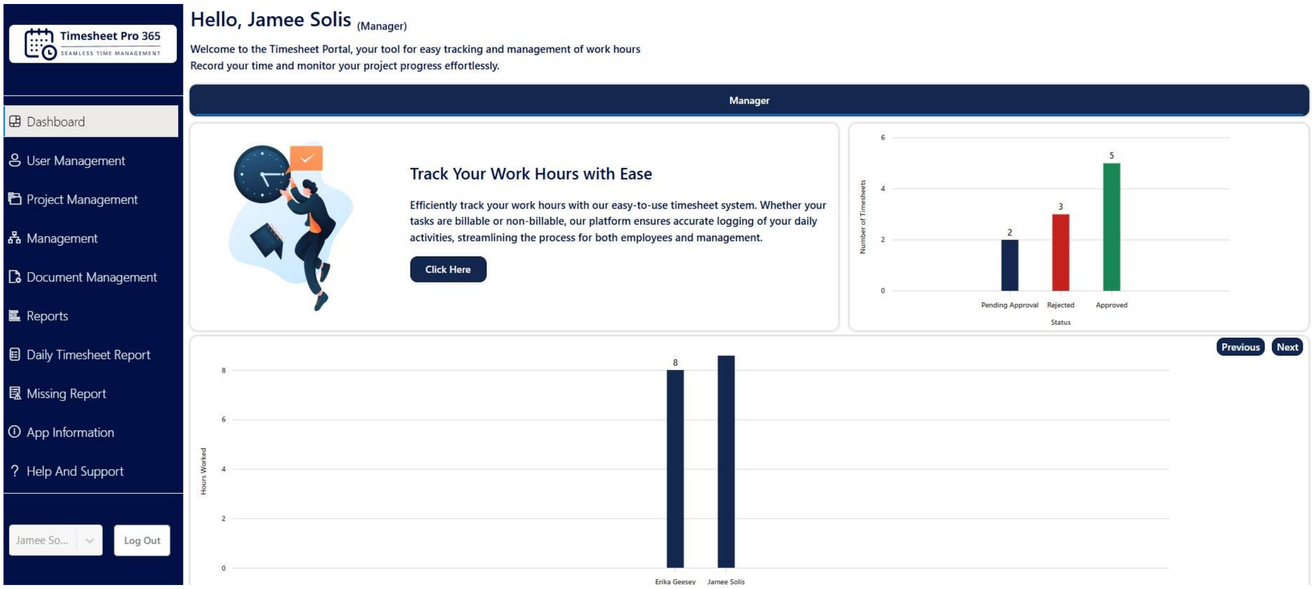


Removing a Shortcut: If you no longer need a shortcut, click on the **cross (x)** on the shortcut card to remove it from the dashboard.

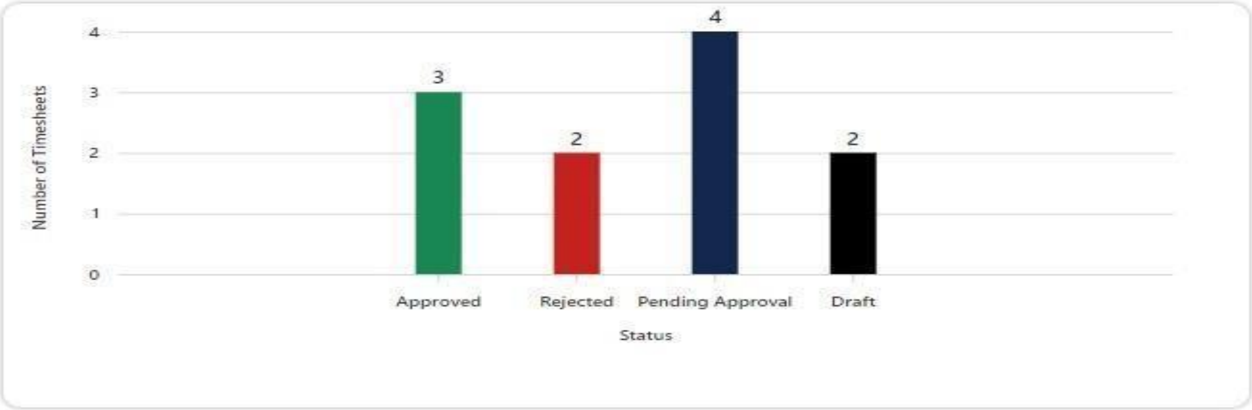


Manager Dashboard

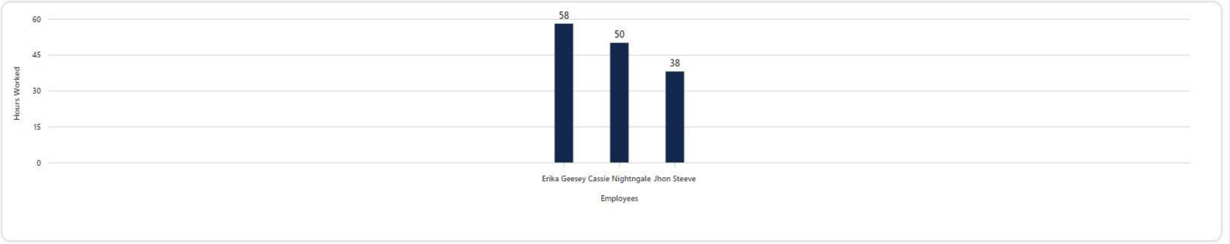
1. Timesheet Status Bar Graph
2. Hours Worked Bar Graph
3. User Identification and Role Display



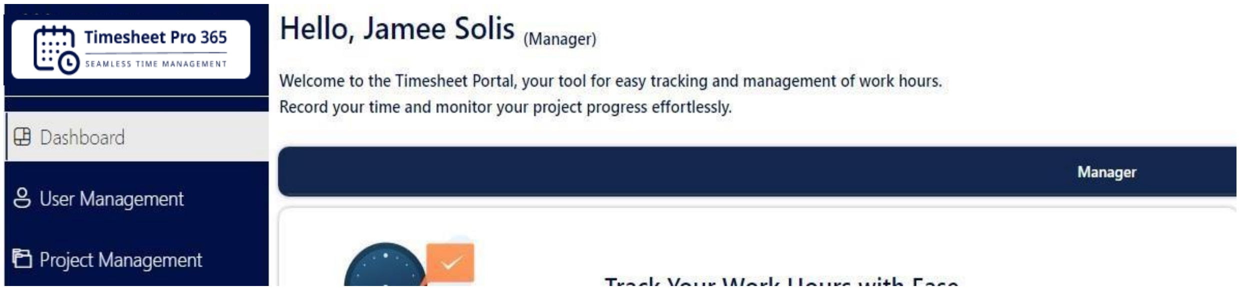
1. Timesheet Status Bar Graph: Visualize the manager's timesheets with a bar graph, categorizing them by status (e.g., Approved, Rejected, Pending, Draft) using distinct colors for clarity.



2. Hours Worked Bar Graph: Show a bar graph in step 1 that displays each employee's hours worked in the previous week, providing a visual breakdown of time allocation.

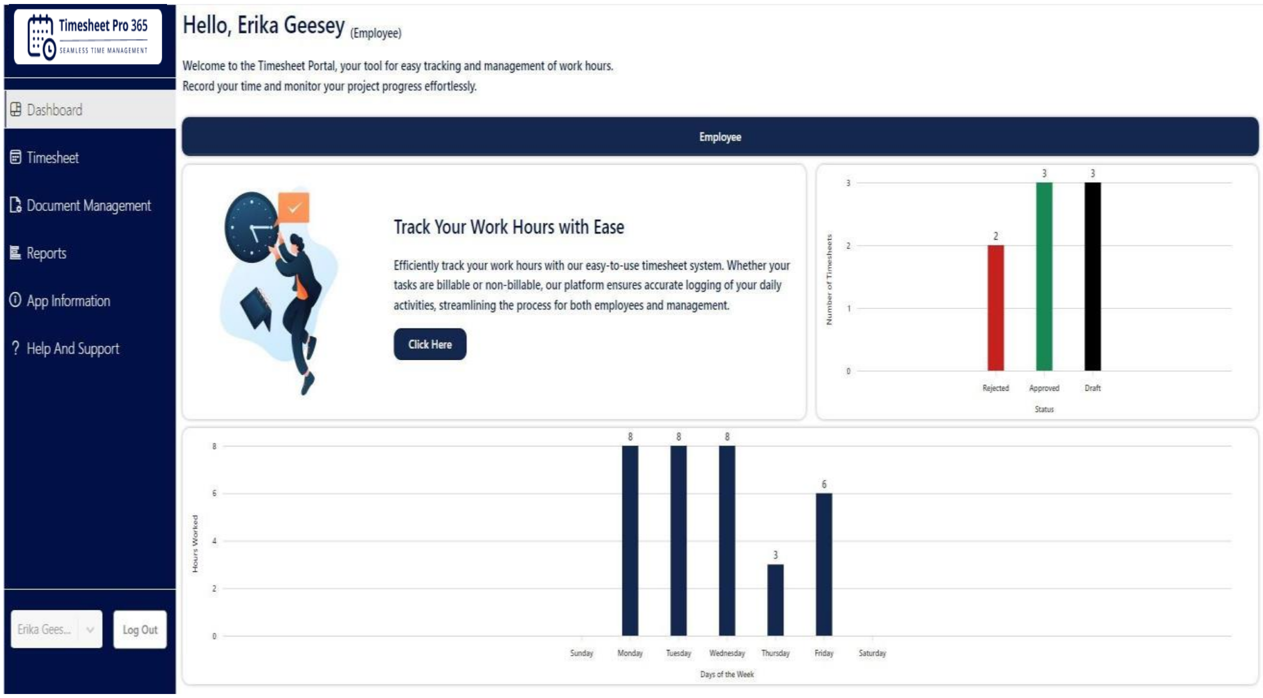


3. User Identification and Role Display: Retrieve and prominently display the current user's role (e.g., Manager) on the dashboard for easy identification.

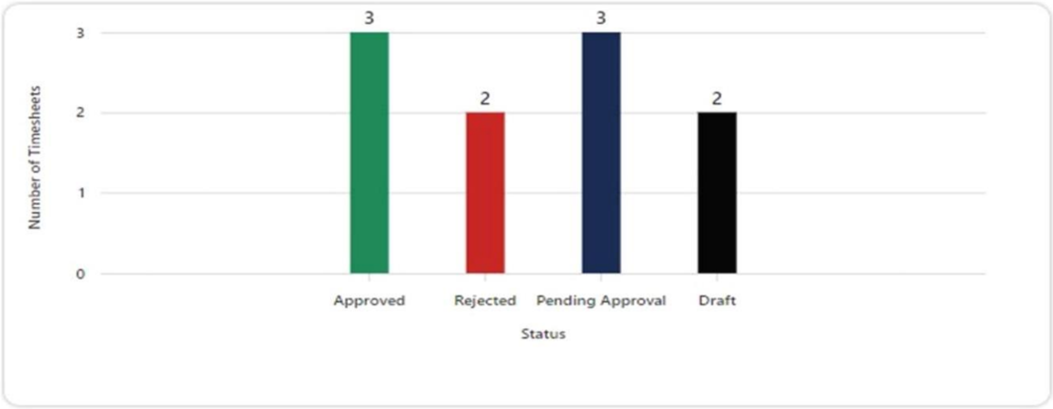


Employee Dashboard

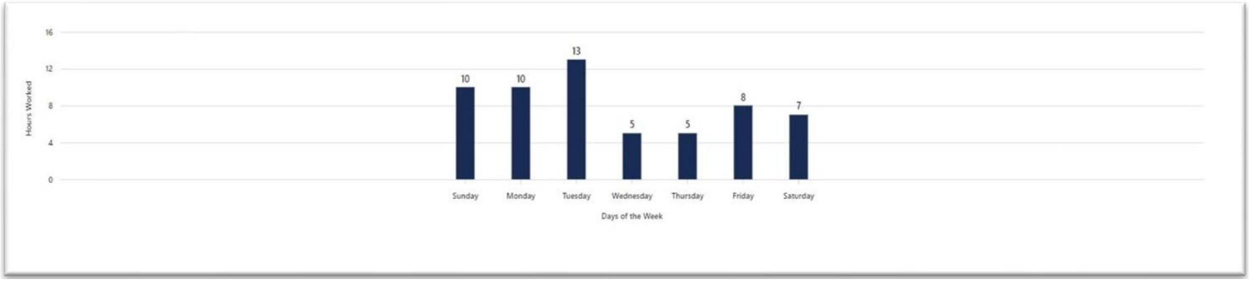
1. Timesheet Status Bar Graph
2. Hours Worked Bar Graph
3. User Identification and Role Display



1. Timesheet Status Bar Graph: Present a bar graph indicating the number of timesheets submitted by the employee, categorized by statuses like Approved, Rejected, Pending, and Draft, with each status distinguished by a unique color.



2. Hours Worked Bar Graph: Display a bar graph showcasing the employee's hours worked,divided by each day of the week.



3.User Identification and Role Display:
Retrieve and prominently display the current user's role(e.g.,Manager) on the dashboard for easy identification.

User Management: How to create a new user role

Add New User Roles

1. Role Selection: Enable the administrator to choose the role from a predefined list.

2. User Email: Input the user's email address linked to this role.

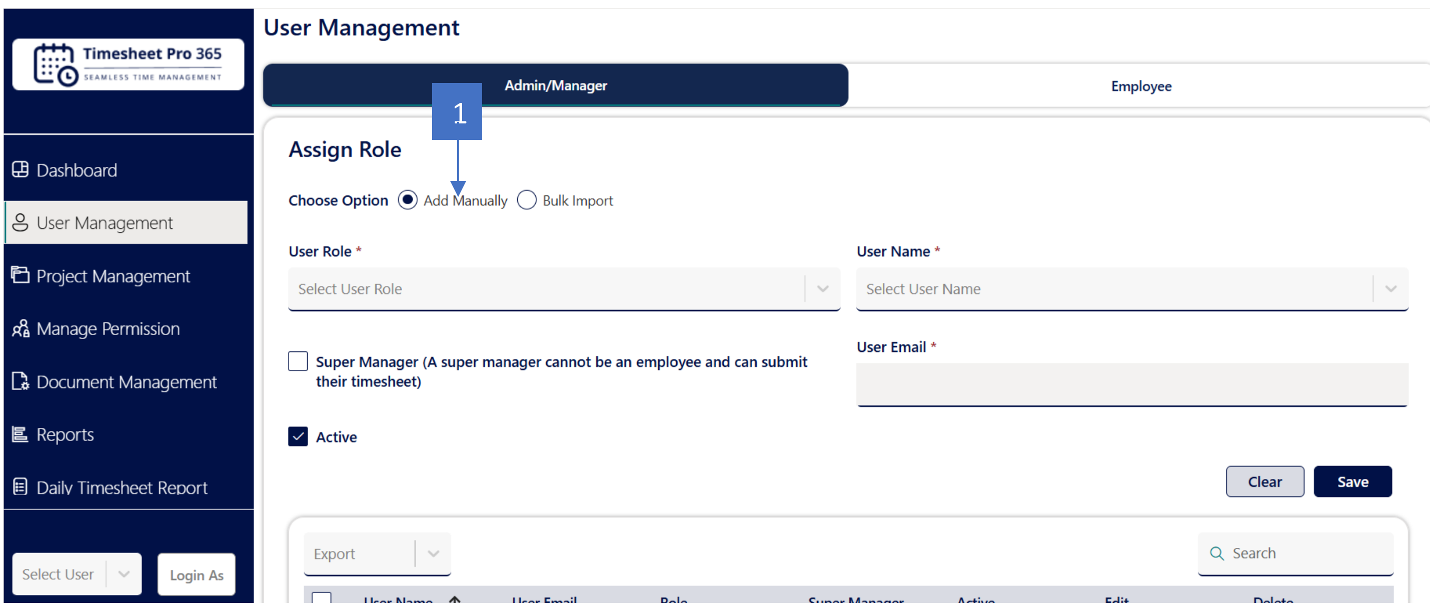
3. Super Manager Option: Provide a checkbox for the administrator to designate the user as a Super Manager.

4. Activation Control: Offer an option for the administrator to activate or deactivate the user role.

5. Save Button: Incorporate a **Save** button at the form's bottom to preserve the new user role.

There are two ways to create a user role :

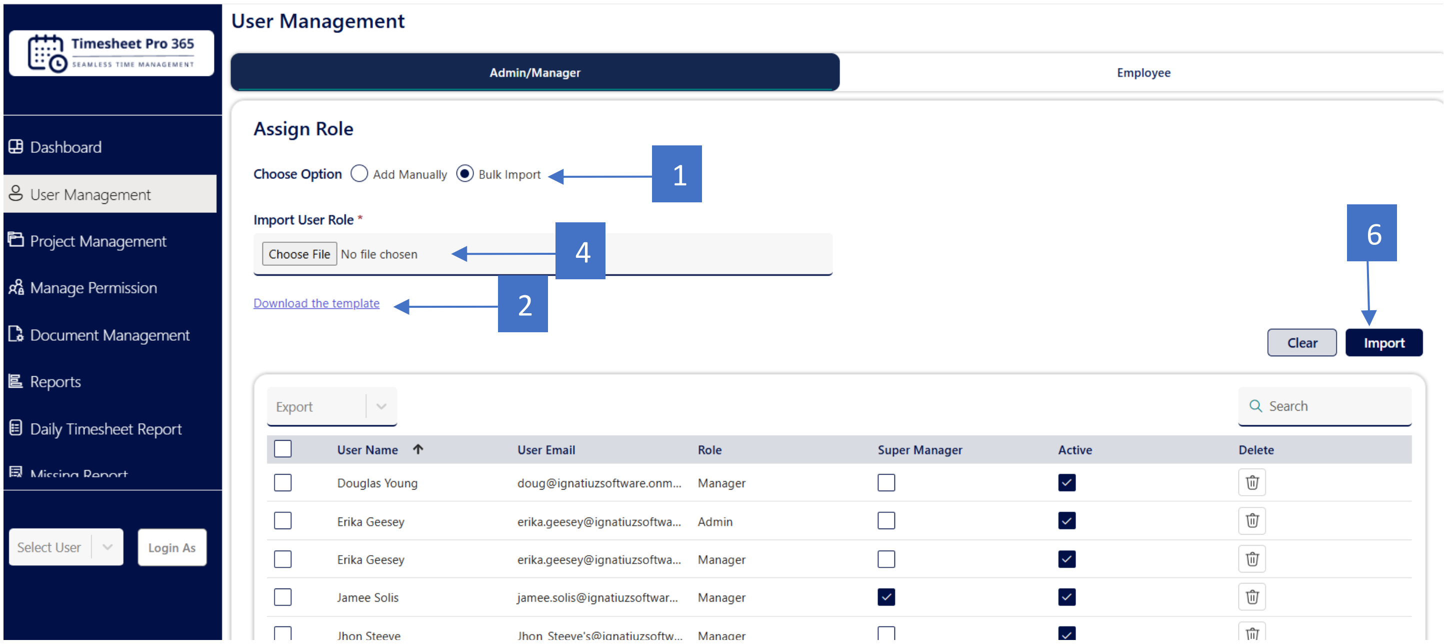
Add Manually



Bulk Import

On the Admin/Manager tab, you can see the **Bulk Import** option with a radio button.

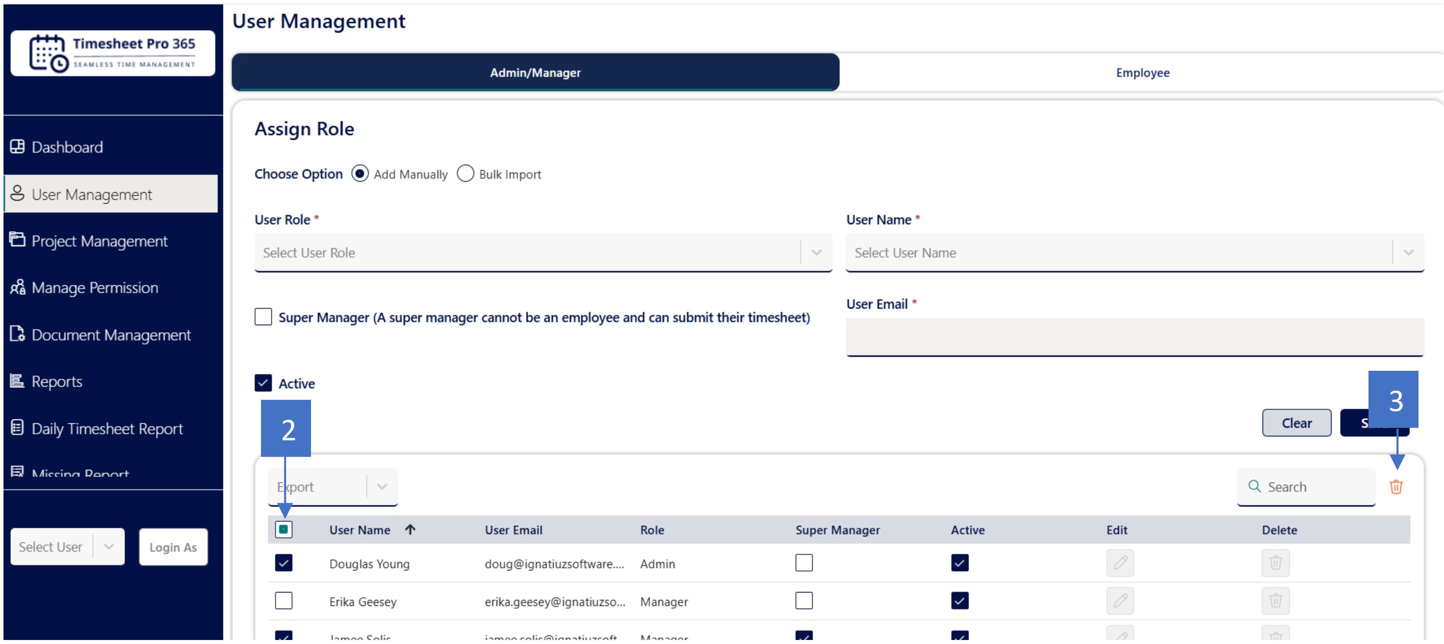
1. Select the **Bulk Import** radio button.
2. Download the correct format Excel file directly.
3. Update the downloaded Excel file with the desired data.
4. Select the file by clicking on the **Choose file** button.
5. Upload the file back to this page.
6. Click on the import button.



Bulk Delete Users for Admin/Manager Tab

The Bulk Delete feature allows **Admins** and **Managers** to delete multiple user records efficiently, streamlining the user management process.

1. Select multiple users by checking the boxes next to the users you want to delete. You can select two or more users at once.
2. Once two or more checkboxes are selected, the **Bulk Delete** option will appear in the top-right corner of the table.
3. Click the **Bulk Delete** option to remove all selected users.
4. A confirmation message will pop up. Review the selected users and confirm to proceed with the deletion.



Add New Employee

1. Employee name: Allow administrators and managers to enter the employee's name.

2. Employee email: Automatically fetch the associated email ID of the employee based on the entered name.

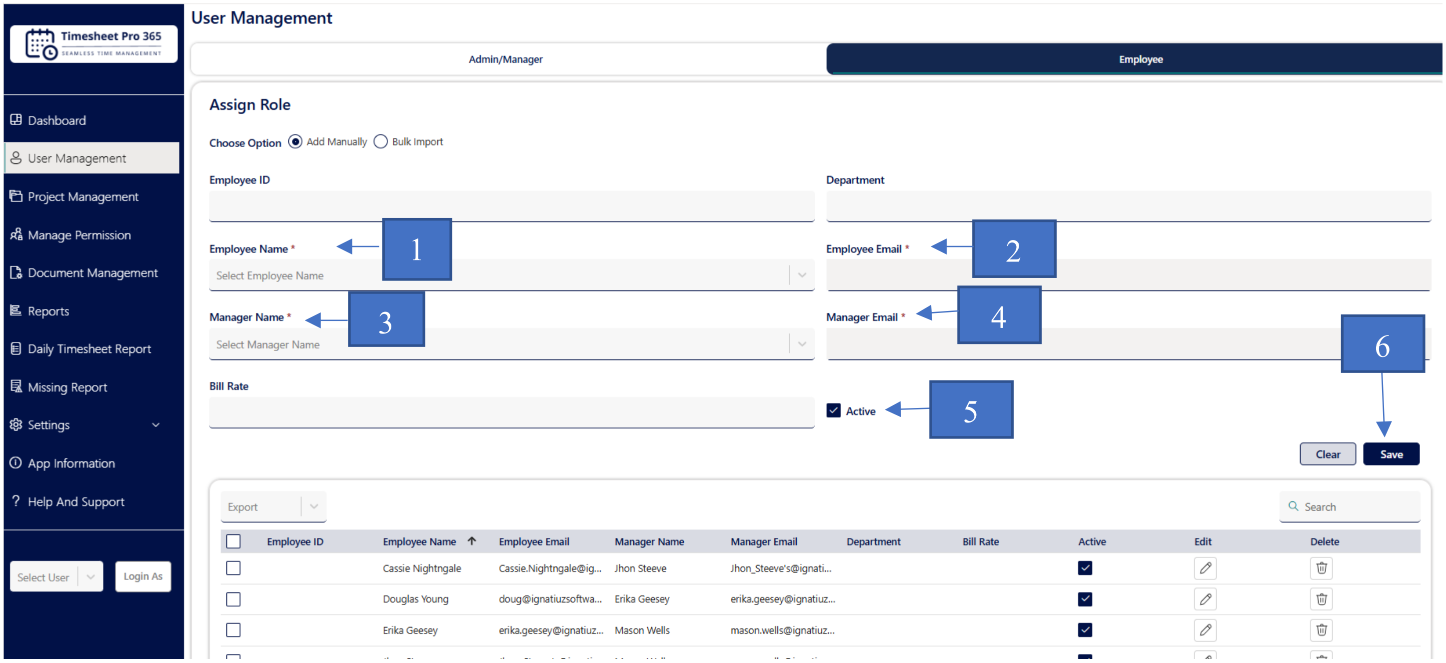
3. Manager name: Provide a dropdown to select the manager's name from a list.

4. Manager email: Automatically fetch the associated email ID of the selected manager.

5. Active checkbox: Allow the user to mark if the new employee should be active in the timesheet application.

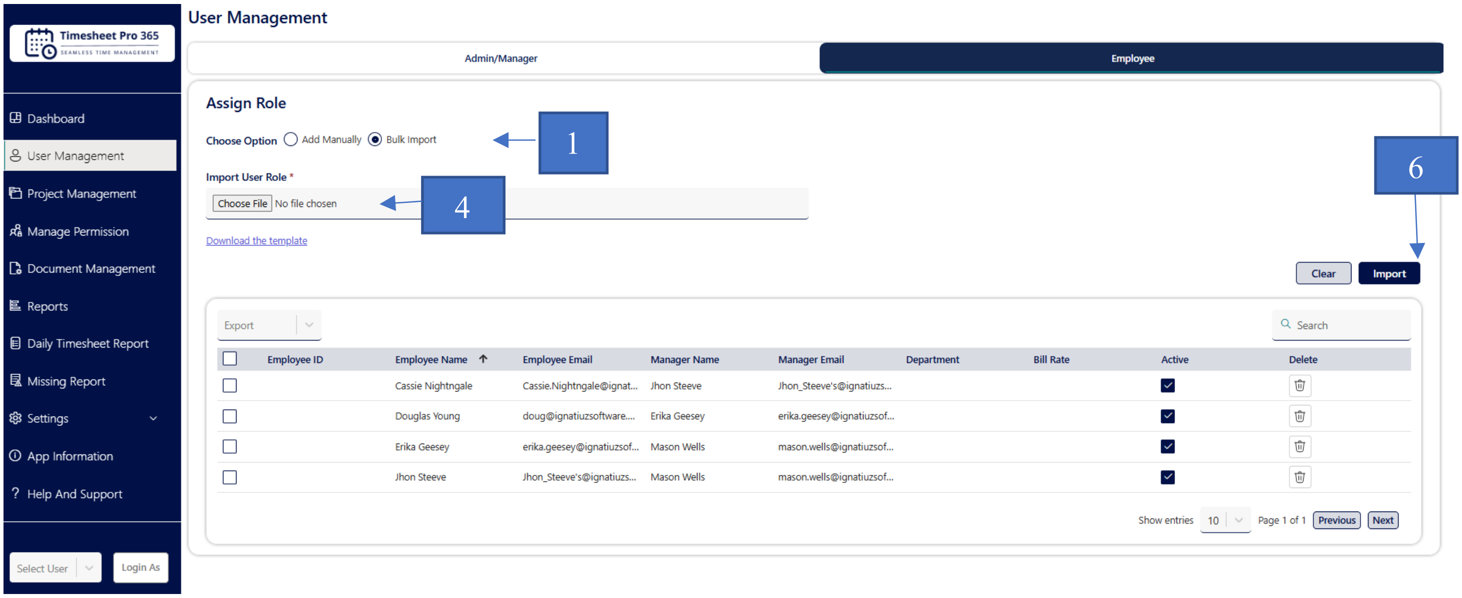
6. Include a **Save** button at the bottom of the form to create a new employee user.

Add Manually



Bulk Import

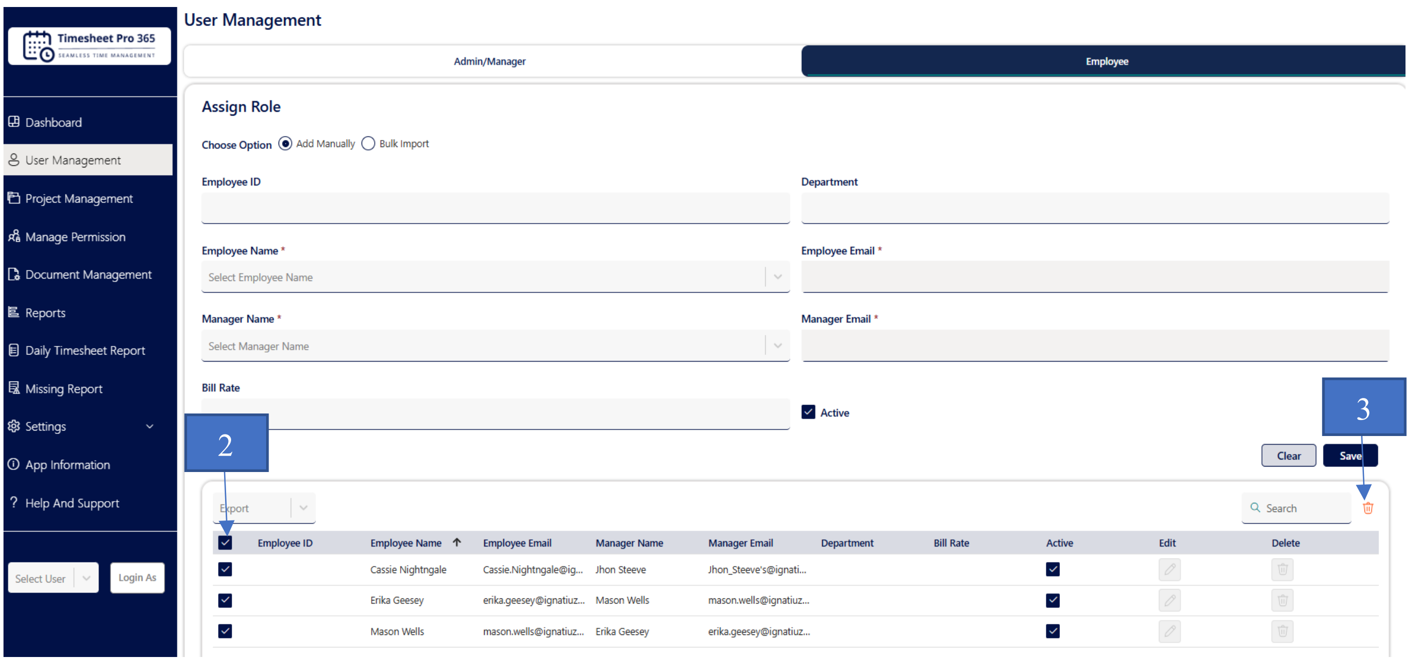
On the Employee tab, you can see the **Bulk Import** option with a radio button.
1. Select the **Bulk Import** radio button.
2. Download the correct format Excel file directly.
3. Add employee to the downloaded Excel file.
4. Select the file by clicking on the **Choose file** button.
5. Upload the file back to this page.
6. Click on the import button.



Bulk Delete Employee

The **Bulk Delete** feature allows Admins and Managers to delete multiple user records efficiently.

1. Select the checkboxes for **two or more users** from the list.
2. When **more than one checkbox** is selected, the **Bulk Delete option** will appear at the top-right corner of the table.
3. Click the **Bulk Delete option** to remove all selected users.
4. A confirmation message will appear. Review the selected entries and confirm to proceed with the deletion.

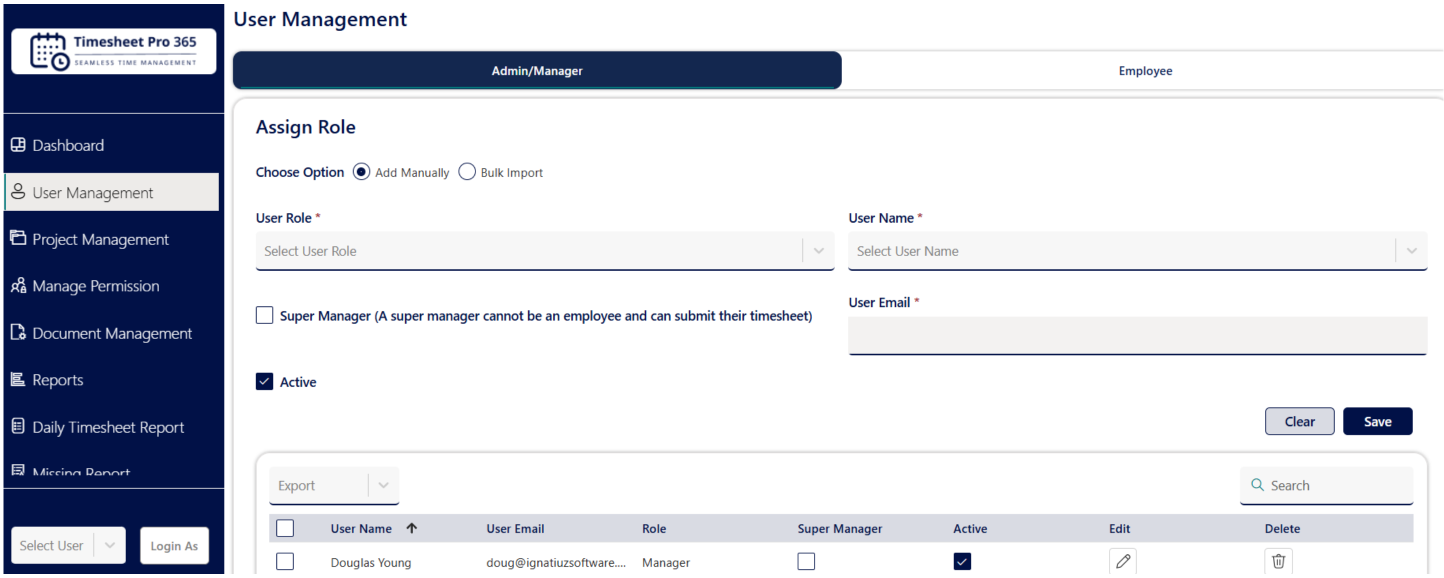


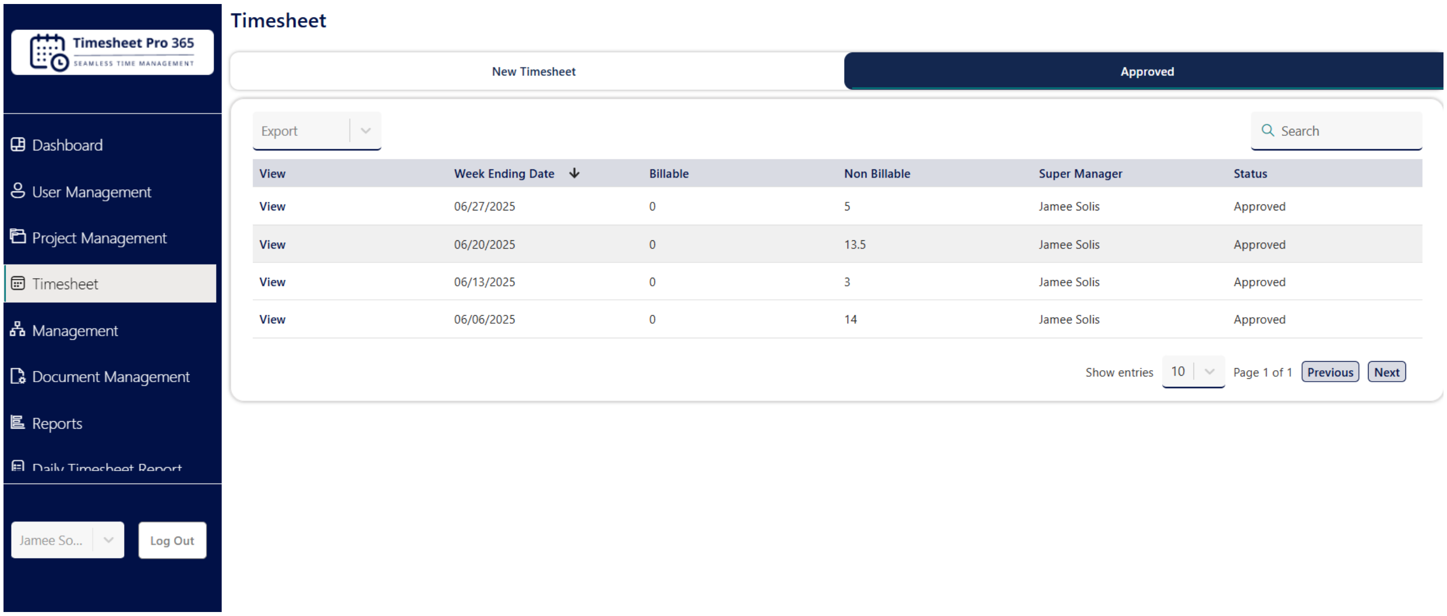
Super Manager Role: Adding a New Super Manager Role

Administrators have the ability to create new user roles, including the **Super Manager** role, through the **User Management** section. This role allows for additional administrative control without submitting timesheets for approval.

Follow these steps to add a new Super Manager role:

1. **Navigate to User Management** in the dashboard.
2. Click on **Admin/Manager**, which will open a form to create a new user role.
3. **Select the Role** you want to assign (e.g., Admin, Manager).
4. **Note:** An existing employee cannot be promoted directly to a Super Manager role.
5. **Set Active Status:** Use the checkbox to mark the Super Manager as **Active**. If you wish to deactivate the role, simply uncheck the box.
6. **Enter the User's Information:** Fill in the **username** and the **email address**. The system will auto-fetch the email once the user is selected.
7. **Save the Role:** Once all fields are filled out, click **Save** to create the new Super Manager role.
8. **Super Manager Role Functionality:**
   - **No Approval Required for Timesheets:** Super Managers' timesheets do not go through the approval process; they are directly approved.
   - **Access to Submitted Timesheets:** Super Managers can view all their submitted timesheets along with their status.




Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Timesheet
Management
Document Management
Reports
Daily Timesheet Report
Jamee So...
Log Out
Timesheet
New Timesheet
Approved
Export
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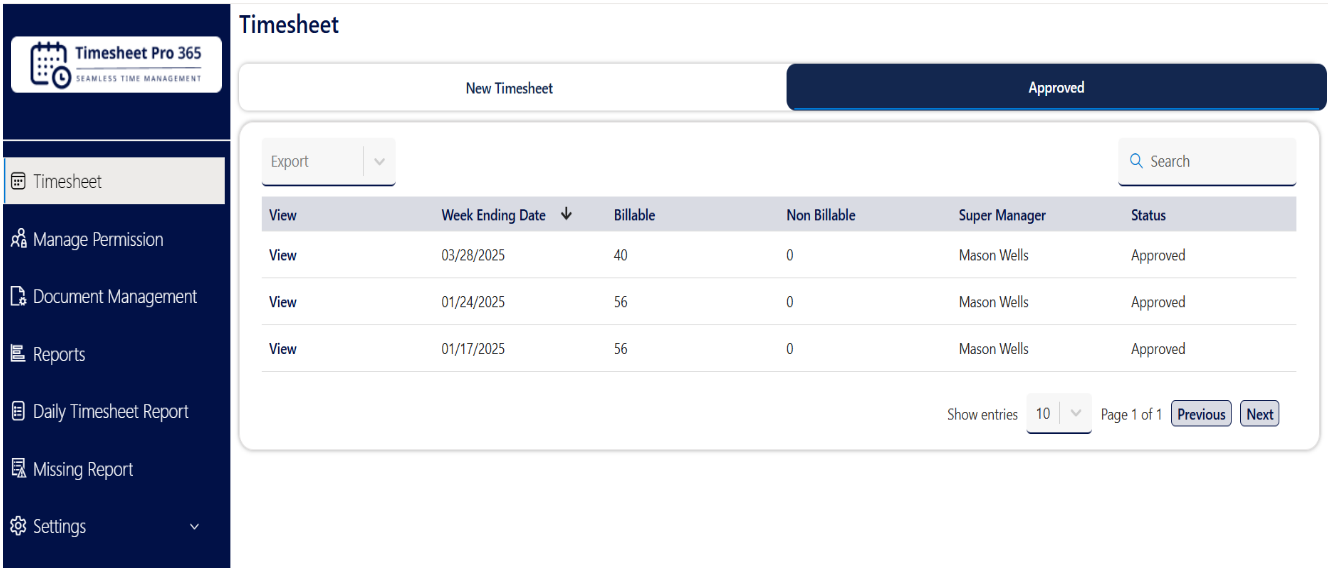
View
Week Ending Date
Billable
Non Billable
Super Manager
Status
View 06/27/2025 0 5 Jamee Solis Approved
View 06/20/2025 0 13.5 Jamee Solis Approved
View 06/13/2025 0 3 Jamee Solis Approved
View 06/06/2025 0 14 Jamee Solis Approved
Show entries
10
Page 1 of 1
Previous
Next

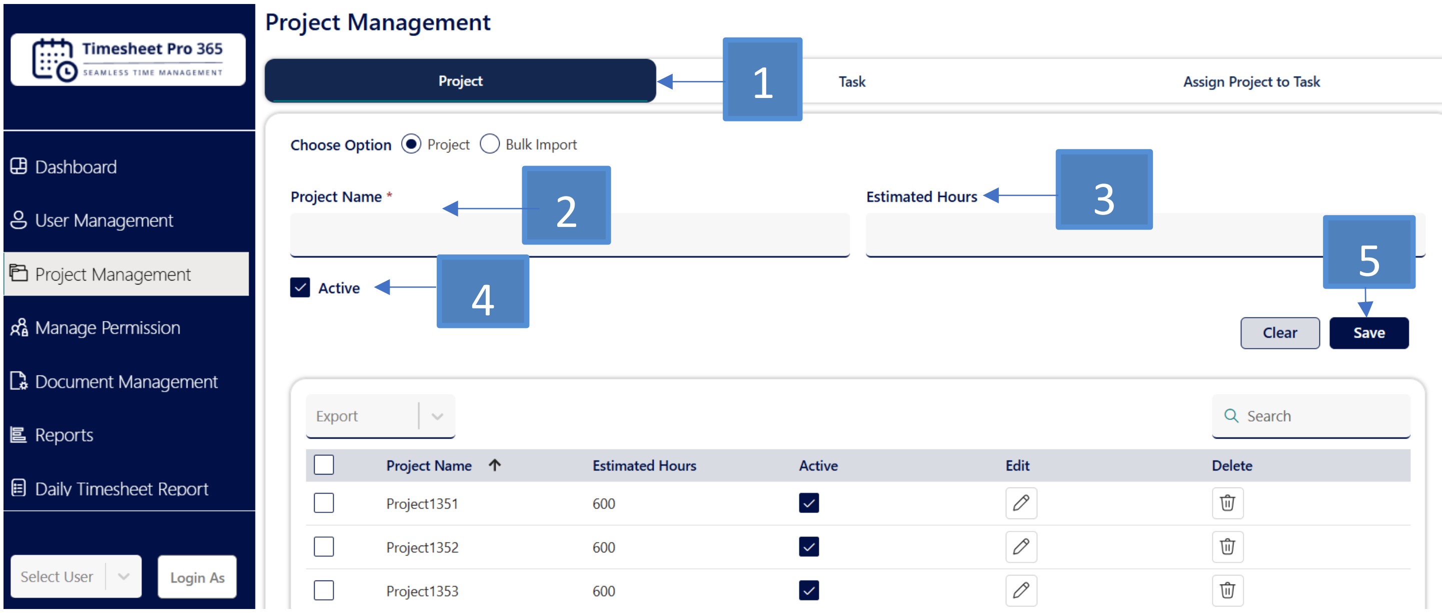
Project Management - Add New Project and Task

To manage projects effectively, administrators and users can add new projects or tasks by following these steps:

Add New Project Manually:

1. **Navigate to the Projects Tab**: Once users click on the **Projects** tab, a form will appear for creating a new project.
2. **Project Name**: Provide a text field where users can enter the name of the project.
3. **Estimated Hours**: Include a field where users can specify the estimated number of hours required to complete the project.
4. **Active Checkbox**: Add a checkbox to allow users to mark the project as **active**. If the checkbox is checked, the project will be considered active; if unchecked, it will be marked as inactive.
5. **Save Button**: Ensure that there is a **Save** button at the bottom of the form. Once users have entered the necessary details, they can click **Save** to store the project.

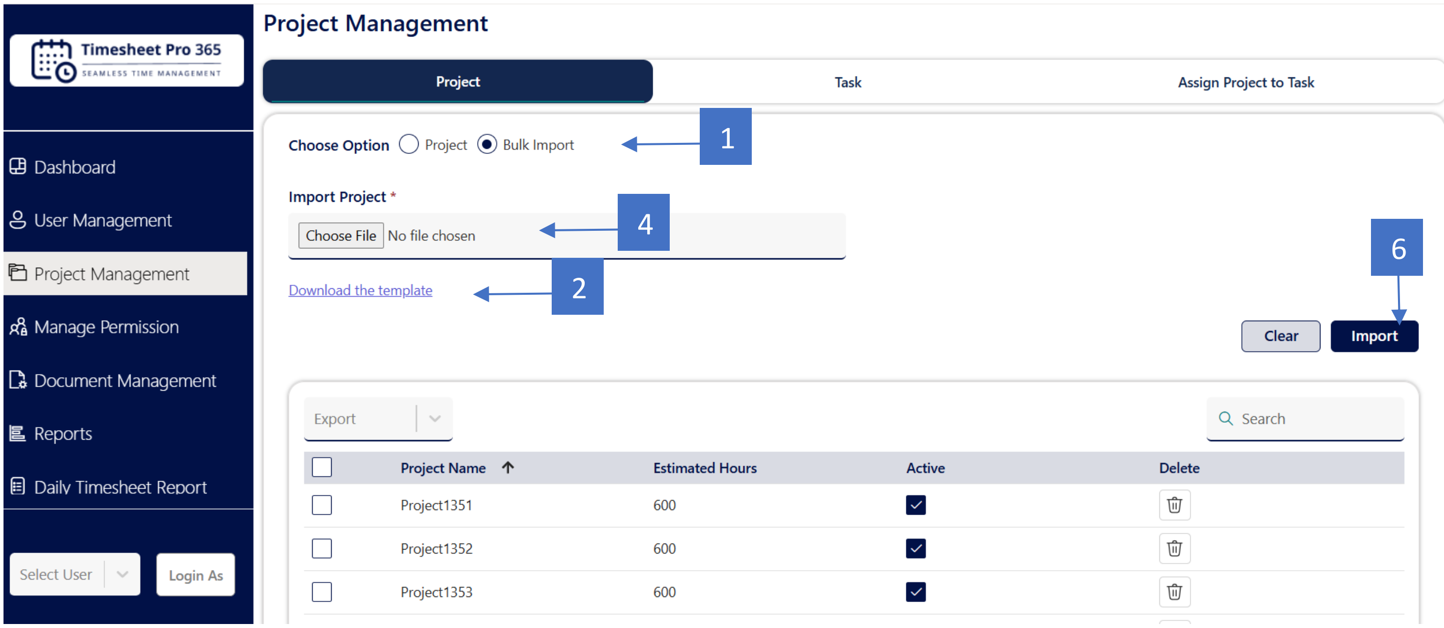



Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Select User
Login As
Project Management
Project
Task
Assign Project to Task
1
Choose Option
Project
Bulk Import
Project Name *
2
Estimated Hours
3
Active
4
5
Clear
Save
Export
Search
Project Name
Estimated Hours
Active
Edit
Delete
Project1351
600
Project1352
600
Project1353
600

Bulk Import - Import Project

The Bulk Import feature allows you to upload multiple projects at once, saving time and effort. Follow the steps below to perform a bulk import of projects:

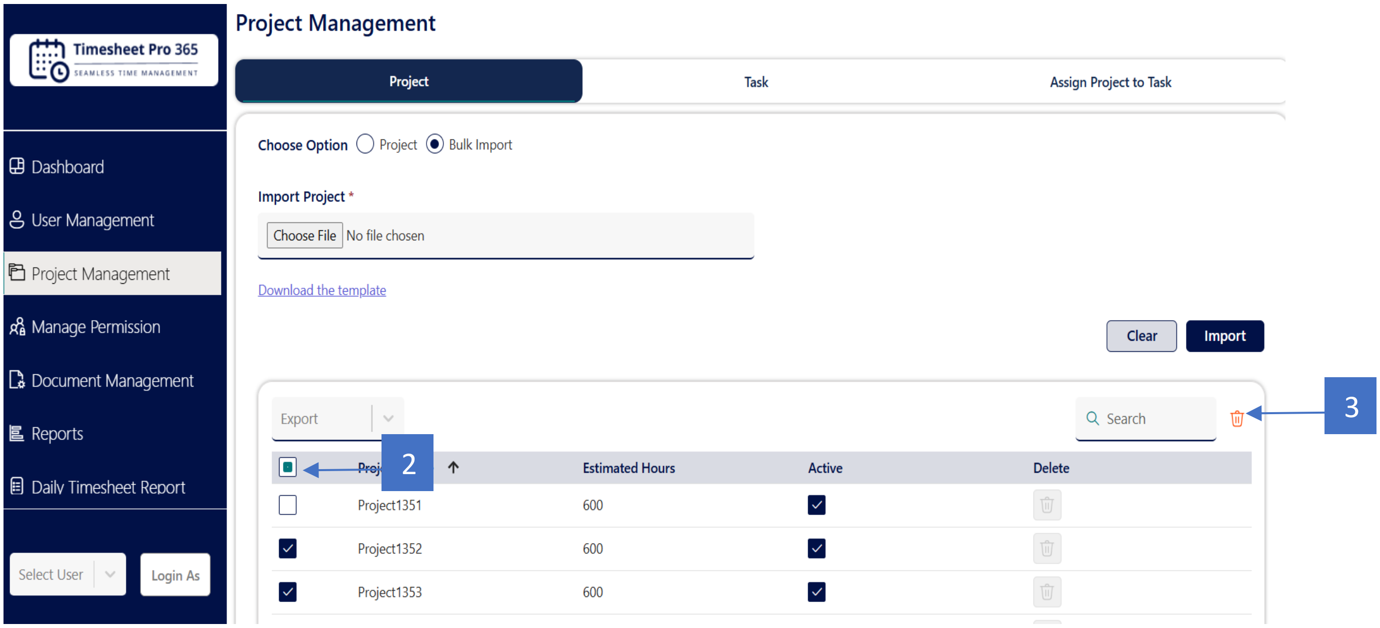
1. **Select the Bulk Import Option:**
   On the **Project** tab, you will see the **Bulk Import** option. Select the **Bulk Import** radio button to proceed.
2. **Download the Template:**
   Click the **Download the template** link to get the correct format Excel file required for project import.
3. **Add Projects to the Excel File:**
   Open the downloaded Excel template and add the necessary project details, including **Project Name** and **Estimated Hours** for each project.
4. **Upload the Excel File:**
   After filling in the Excel file, click on the **Choose file** button to select the file you have prepared.
5. **Upload the File:**
   Once you've selected the file, it will appear in the file selection box. Click on the **Import** button to upload the file.
6. **Complete the Import:**
   The system will process the file, and the projects will be imported into the system.



Bulk Delete Projects:

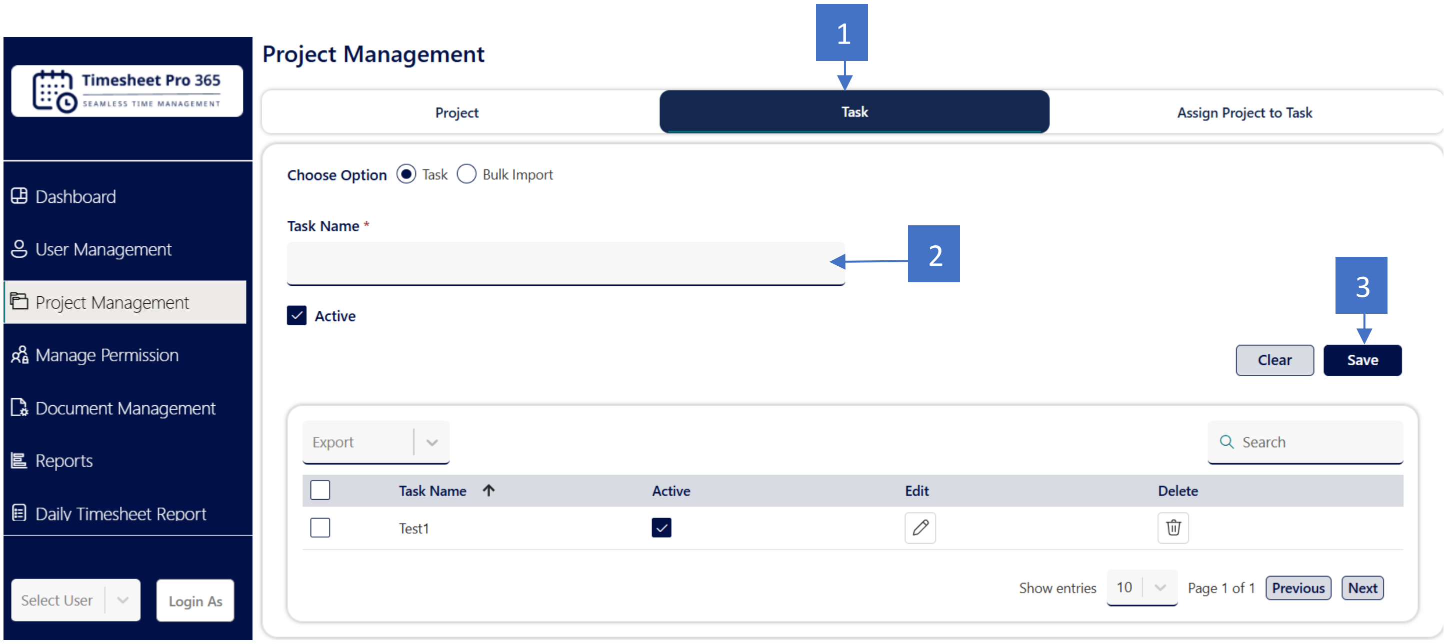
The Bulk Delete feature allows you to delete multiple projects in a single action.

1. Go to the project list table at the bottom of the **Project Management** page.
2. Select the checkboxes for **two or more projects** that you want to delete.
3. Once more than one checkbox is selected, the **Bulk Delete option** will appear in the top-right of the project table.
4. Click the **Bulk Delete option** and confirm the action to delete the selected projects.



Add New Task Manually:

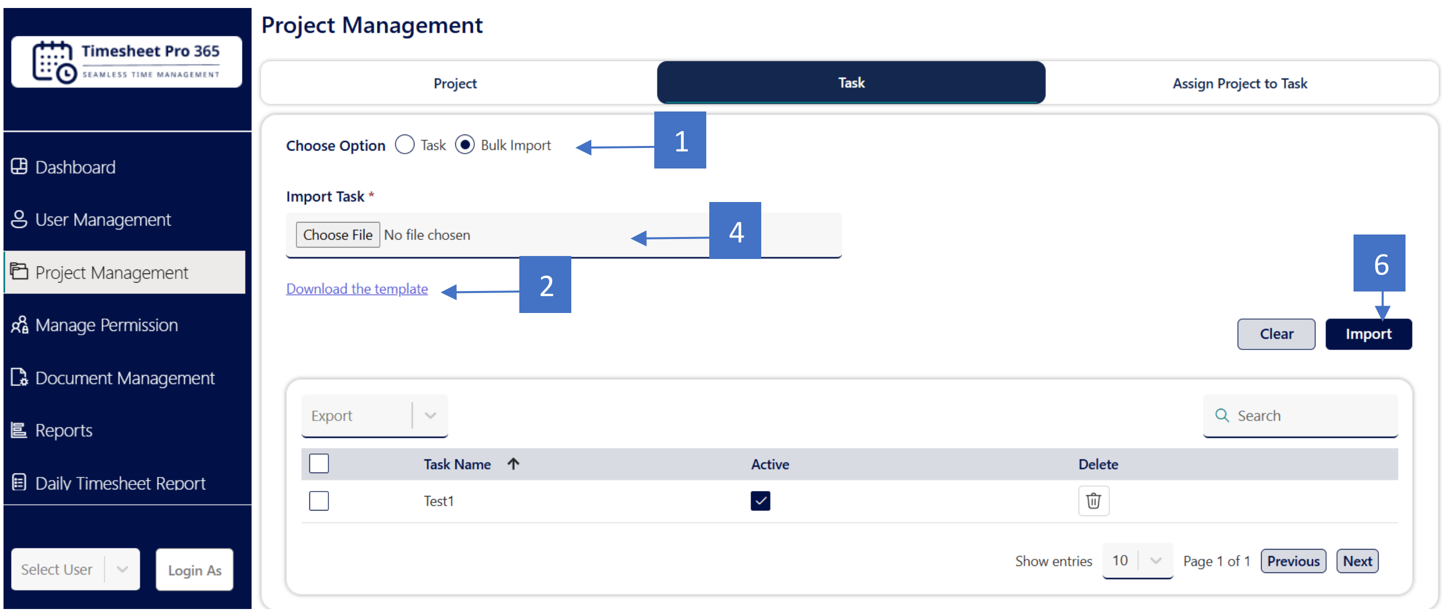
1. **Navigate to the Task Tab:**
   Once users click on the **Task** tab within the **Project Management** section, a form will appear to create a new task.
2. **Enter Task Details:**
   - **Task Name:** Type the name of the task in the provided field.
   - **Active Checkbox:** Optionally, check the **Active** checkbox to make the task active or uncheck it to make the task inactive.
3. **Save the Task:**
   Click **Save** to add the new task to the system.



Bulk Import - Import Task

To efficiently import multiple tasks at once, use the **Bulk Import** option on the **Task** tab. Follow these steps to import tasks:

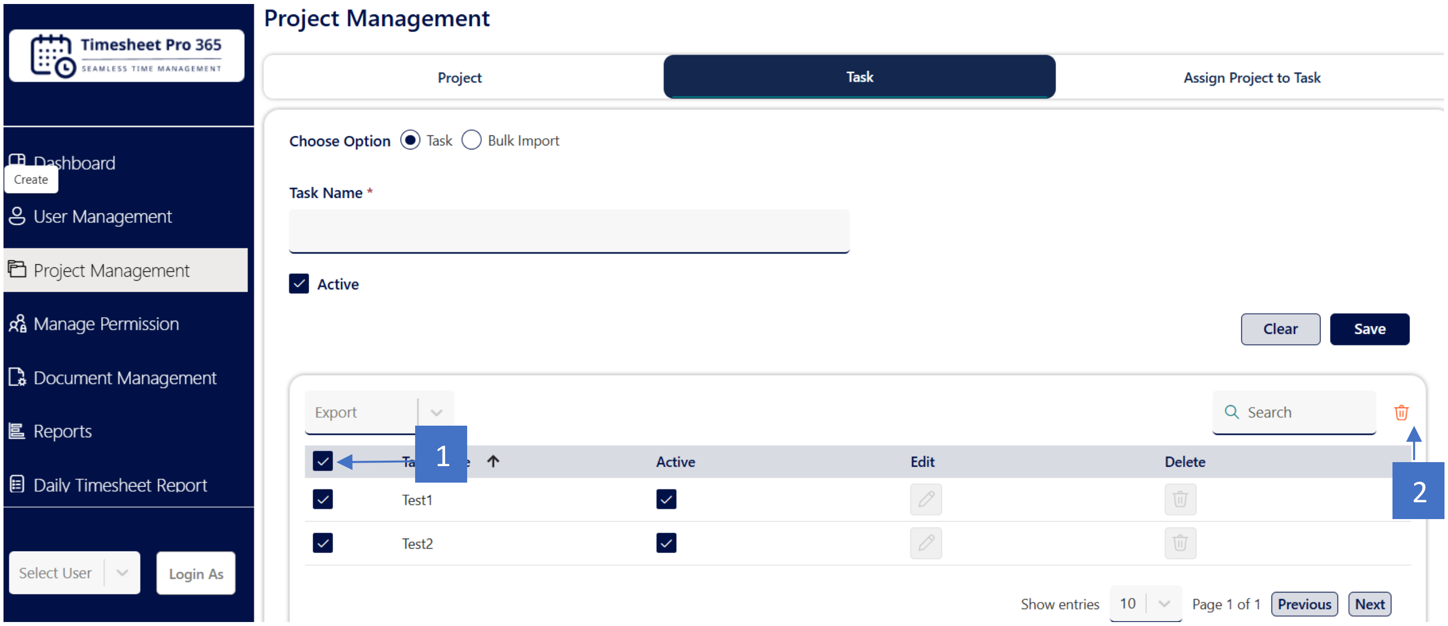
1. **Select the Bulk Import Option:**
   On the **Task** tab, click the **Bulk Import** radio button.
2. **Download the Template:**
   Click the **Download the template** link to download the correct Excel template format for task import.
3. **Add Tasks to the Excel File:**
   Open the downloaded Excel file and add your task details, such as **Task Name** and **Active Status** for each task.
4. **Upload the Excel File:**
   After updating the file, click the **Choose file** button to select the file you just modified.
5. **Upload the File:**
   Once the file is selected, click **Import** to upload the file back to the system.
6. **Complete the Import:**
   The system will process the uploaded file and import the tasks into the system.



Bulk Delete Tasks

You can delete multiple tasks at once.

1. In the task list table, select two or more task checkboxes.
2. When multiple tasks are selected, the **Bulk Delete option** appears at the top right of the list.
3. Click **Bulk Delete** and confirm to remove the selected tasks.

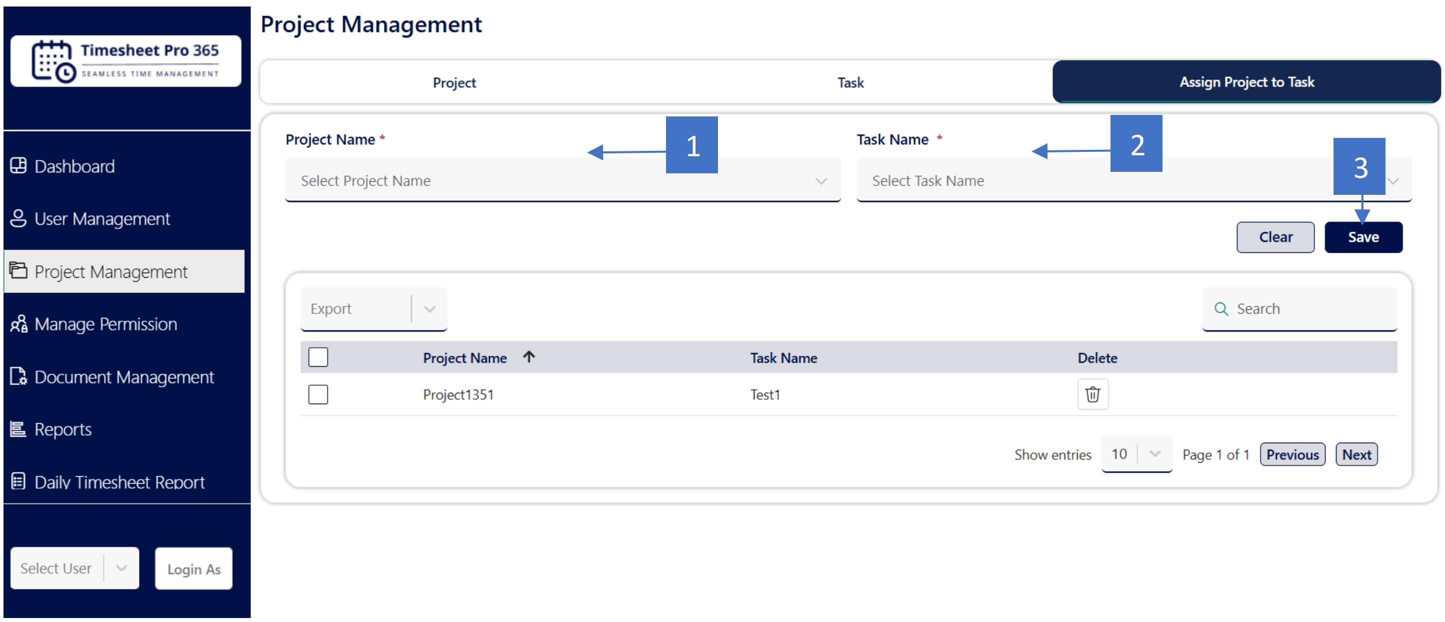


Assign Project to Task

Once users click on the **Assign Project to Task** tab within the **Project Management** section, a form will appear to assign a project to a task. Follow these steps to complete the process:

1. **Select the Project:**
   In the **Assign Project to Task** form, select the desired project from the **Project Name** dropdown menu.
2. **Select the Task:**
   Next, choose the task to which you want to assign the project from the **Task Name** dropdown menu.
3. **Save the Assignment:**
   After selecting both the project and the task, click the **Save** button to finalize the assignment.

This process will associate the chosen project with the selected task, simplifying task and project management.



Excel Format for Bulk Import

When you download the template from the **Bulk Import** option, the following format will appear in the Excel file. This format is used for adding **Projects** and **Tasks** into the system.

1. Excel Format for Project

- **Project Name:** Enter the name of the project (e.g., Project1, Project2).
- **Estimated Hours:** Input the estimated hours for the project (e.g., 100, 200).
- **Active:** Specify whether the project is active or inactive by typing **TRUE** for active projects and **FALSE** for inactive projects.

Projects	EstimatedHours	Active
Project1	100	TRUE
Project2	200	FALSE
Project3	300	FALSE
Project4	400	TRUE
Project5	500	TRUE
Project6	600	FALSE

2. Excel Format for Task

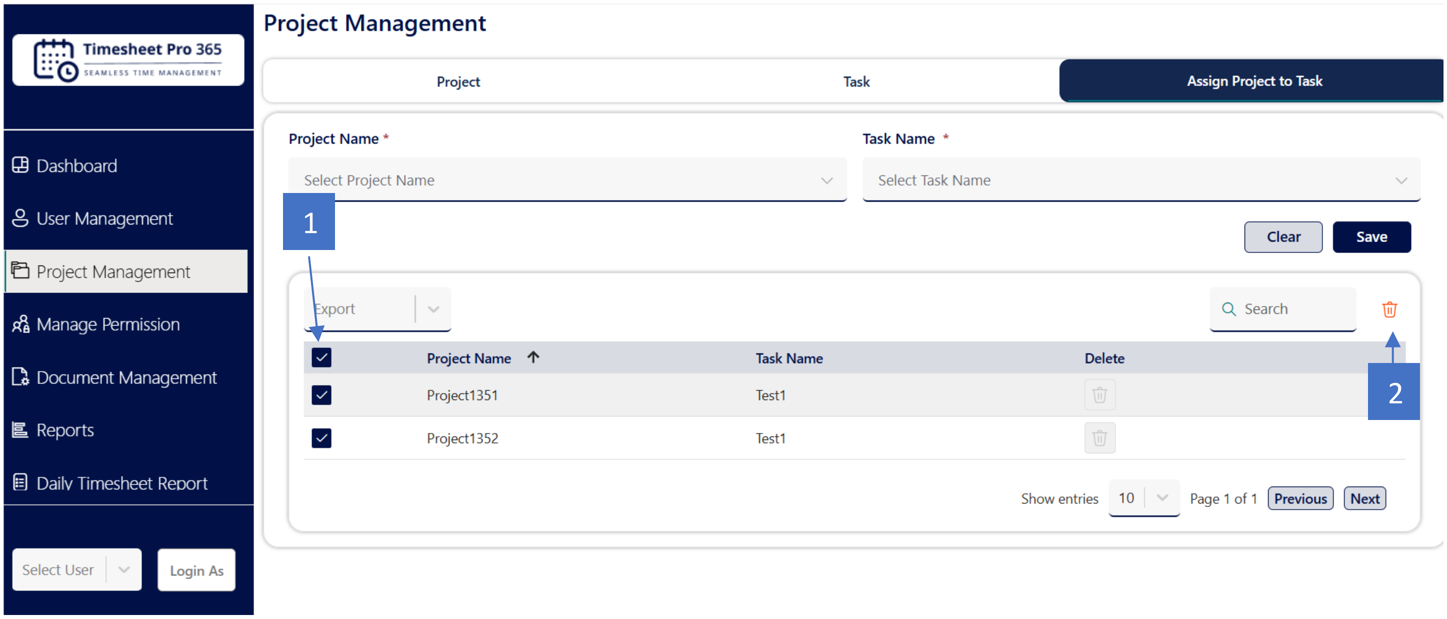
- **ProjectTask:** List the names of tasks (e.g., Project task1, Project task2).
- **Active:** Specify whether the task is active or inactive by typing **TRUE** for active tasks and **FALSE** for inactive tasks.

ProjectTask	Active
Project task1	TRUE
Project task2	FALSE
Project task3	TRUE
Project task4	FALSE
Project task5	TRUE
Project task6	TRUE

Bulk Delete project-to-task assignments

You can remove multiple project-to-task assignments at once.

1. Select two or more assignment checkboxes from the list.
2. The **Bulk Delete option** will appear once multiple rows are selected.
3. Click **Bulk Delete** and confirm to remove the assignments.



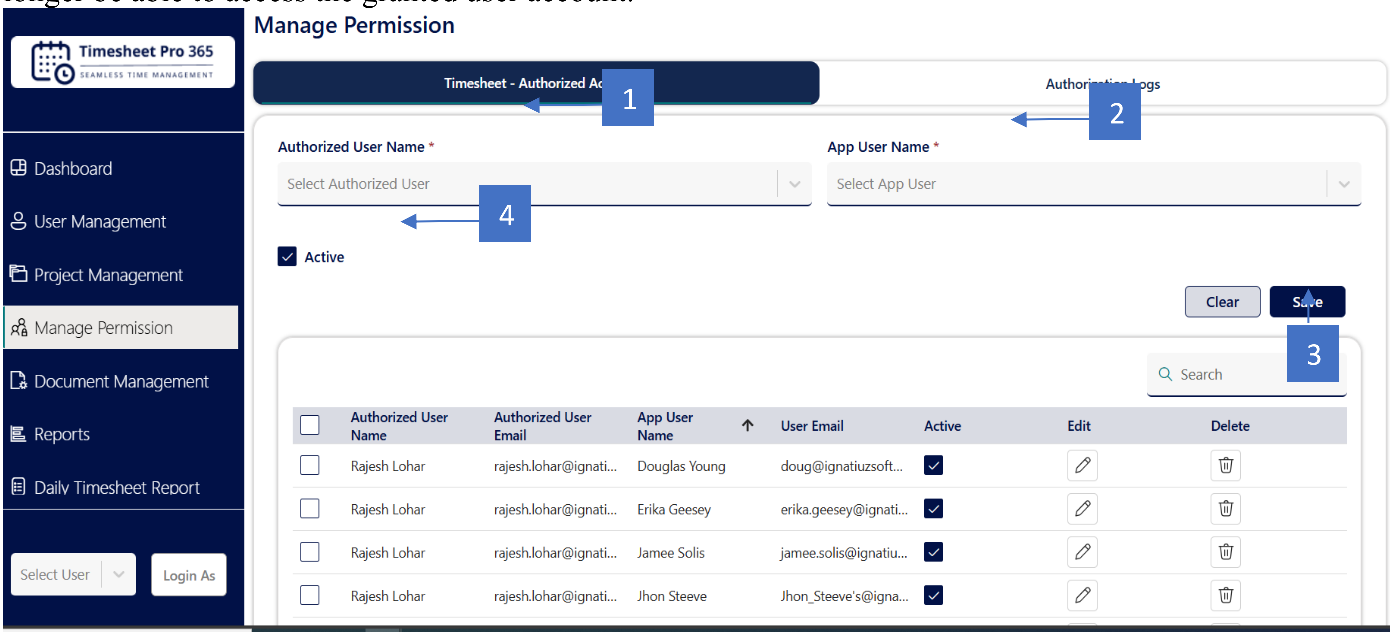
Manage Permission - Authorized Access

To grant a user access to another user's account, follow these steps:

1. **Enter Authorized User Details:**
   In the **Authorized User Name** field, enter the username of the person to whom you want to grant access.
2. **Select App User:**
   From the **App User Name** dropdown, select the user whose account access you want to grant.
3. **Save the Assignment:**
   Click the **Save** button to finalize the access. The authorized user will then have access to the selected user account.

Making Users Inactive:
If needed, you can make the granted user access inactive. Once a user is marked as inactive, they will no

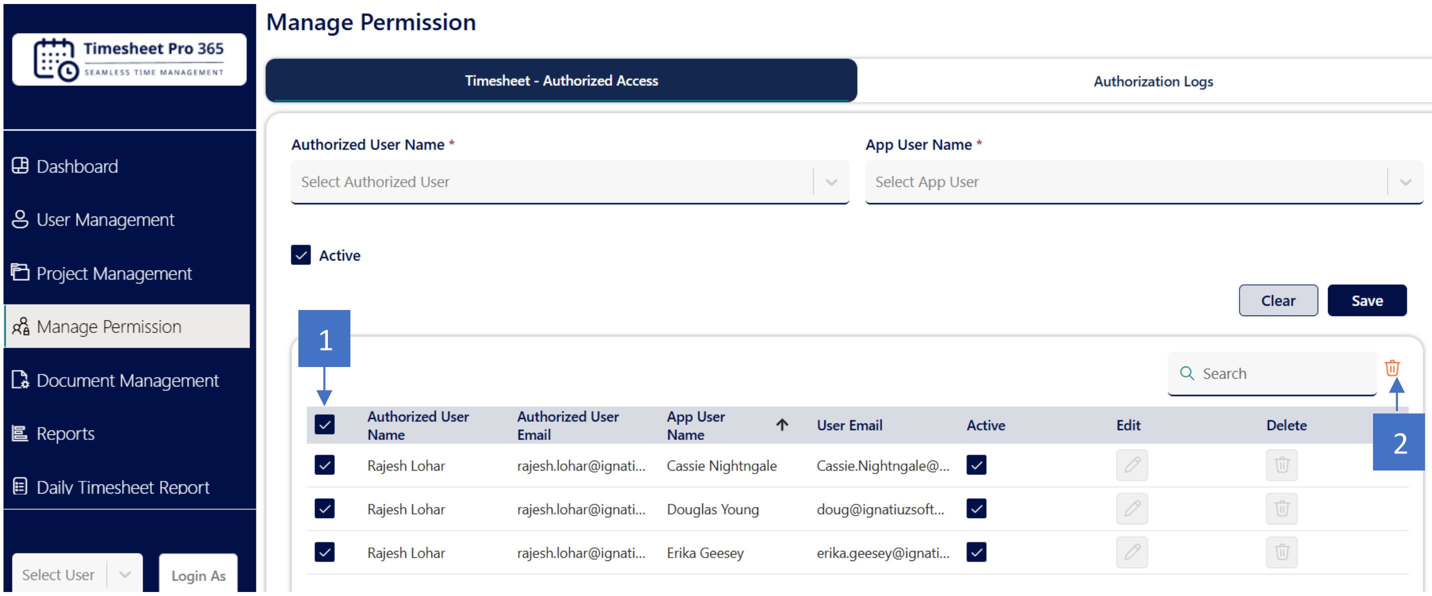
longer be able to access the granted user account.



Bulk Delete Authorized User:

The **Bulk Delete** feature allows you to remove multiple authorized users from the system at once, saving time and improving efficiency when managing user access. Follow these steps to bulk delete authorized users.

1. To bulk delete the authorized users, select two or more checkboxes next to the users you want to delete.
2. Once multiple checkboxes are selected, the Bulk Delete button will appear.
3. Click Bulk Delete and confirm the deletion when prompted.
4. The selected users will be removed from the system immediately.



Authorization Logs

The **Authorization Logs** section records all activities performed by the admin when modifying access permissions or performing actions on behalf of other users. These logs are crucial for tracking changes and ensuring transparency in user management.

How It Works:

1. **Logged In User:**
   This column displays the **admin user** who is logged in and performing actions.
2. **Logged In As:**
   This shows the **user** who is being affected by the admin's actions. For example, if the admin is changing permissions or updating timesheet details for another user, that user will be displayed here.
3. **Page Name:**
   The **page** where the action took place, such as **Timesheet** or another section of the portal.
4. **Activity Performed by User:**
   This column outlines the specific action taken, such as:
   - "Employee timesheet added successfully!"
   - "Email setting has been updated!"
   - "Employee timesheet update successfully!"
5. **Date:**
   This column shows the **date** when the action was performed.

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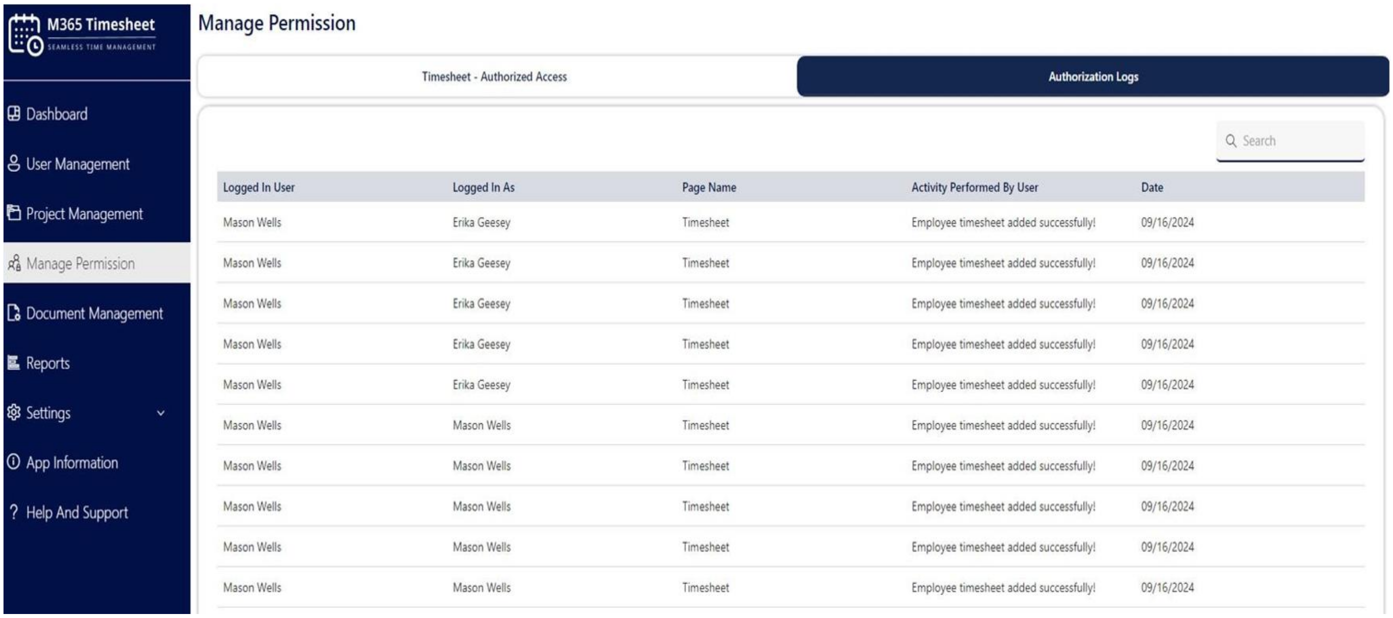
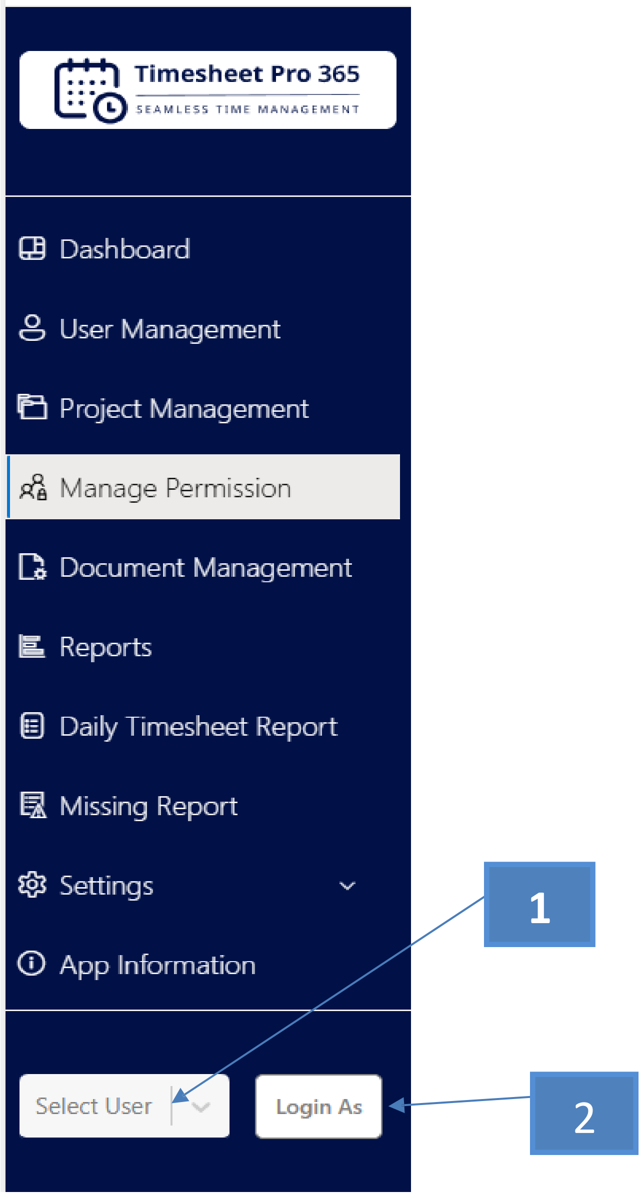


Select App User

To assign management permissions and log in as another user, follow these steps:

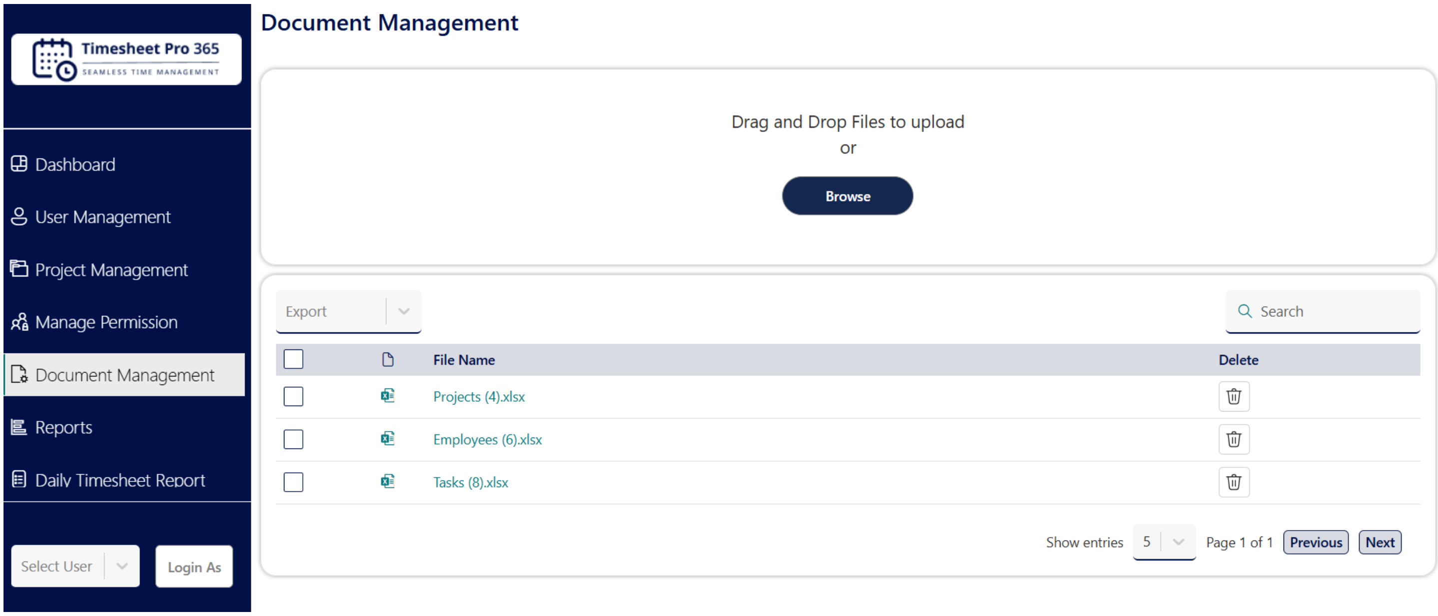
1. **Assign User Management Permissions:**
   Once the user is granted management permissions, they will appear in the dropdown list.
2. **Select App User:**
   In the **App User Name** dropdown, select the user you want to manage.
3. **Login as Selected User:**
   After selecting the desired app user, click on the **Login As** button. This allows the admin to log in as the selected user and perform actions on their behalf.

By following these steps, you can efficiently manage user permissions and log in to any account for administrative tasks.


Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Missing Report
Settings
App Information
Select User
Login As
1
2

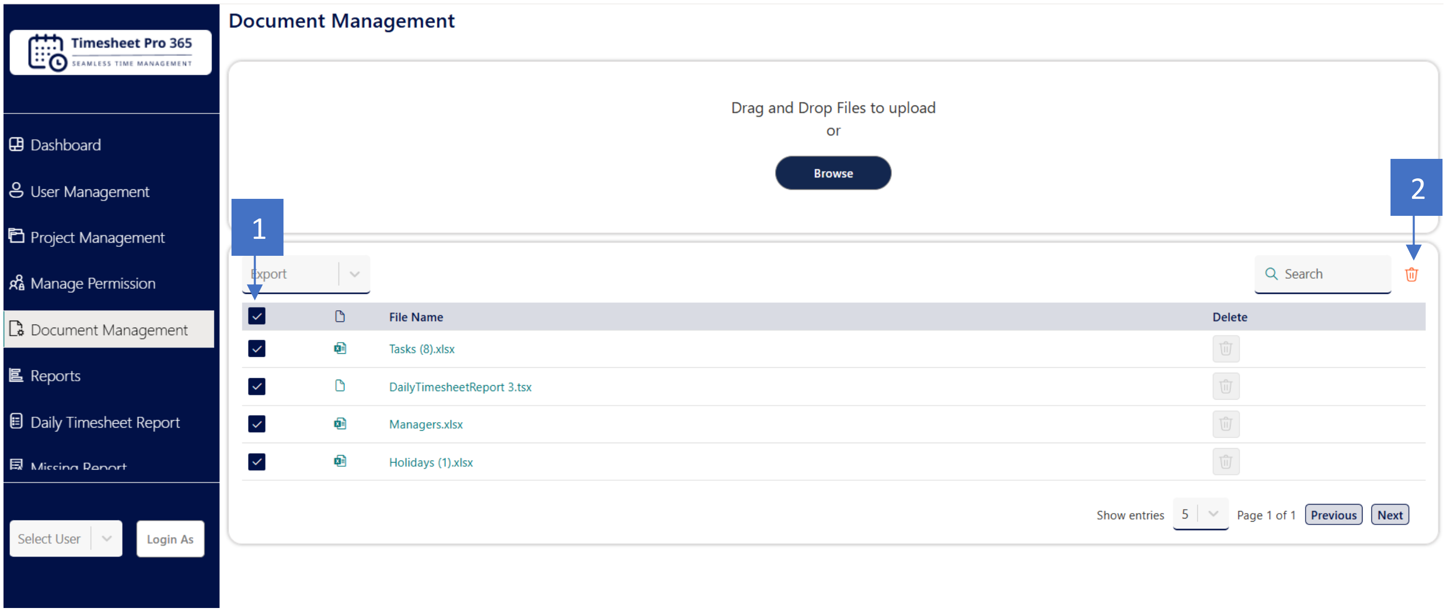
Document Management

1. **Upload Documents:**
   Users can upload documents by selecting one of two options:
   - **Browse:** Click the **Browse** button to open the file explorer, select the desired document, and upload it.
   - **Drag and Drop:** Drag the document from your file explorer and drop it into the designated area to upload.
2. **File Listing:**
   Uploaded files will appear in a table format below the upload area. Each file will display its name, and users can delete files if needed.
3. **Search and Manage:**
   You can search for specific documents by their name using the **Search** bar.



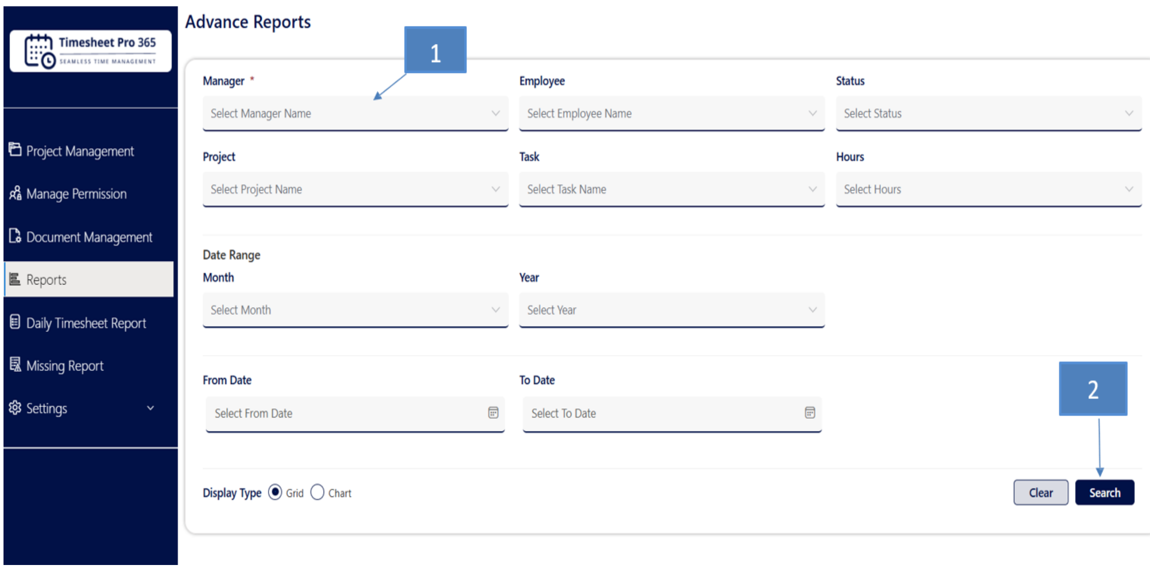
Bulk Delete -Document Management

1. Admin can select multiple documents by checking the checkboxes next to the documents they want to delete.
2. After selecting multiple documents, the **Bulk Delete** button will appear.
3. Click the **Bulk Delete** button to remove the selected documents. A confirmation prompt will appear asking you to confirm the deletion.
4. Once confirmed, the selected documents will be permanently deleted from the system.

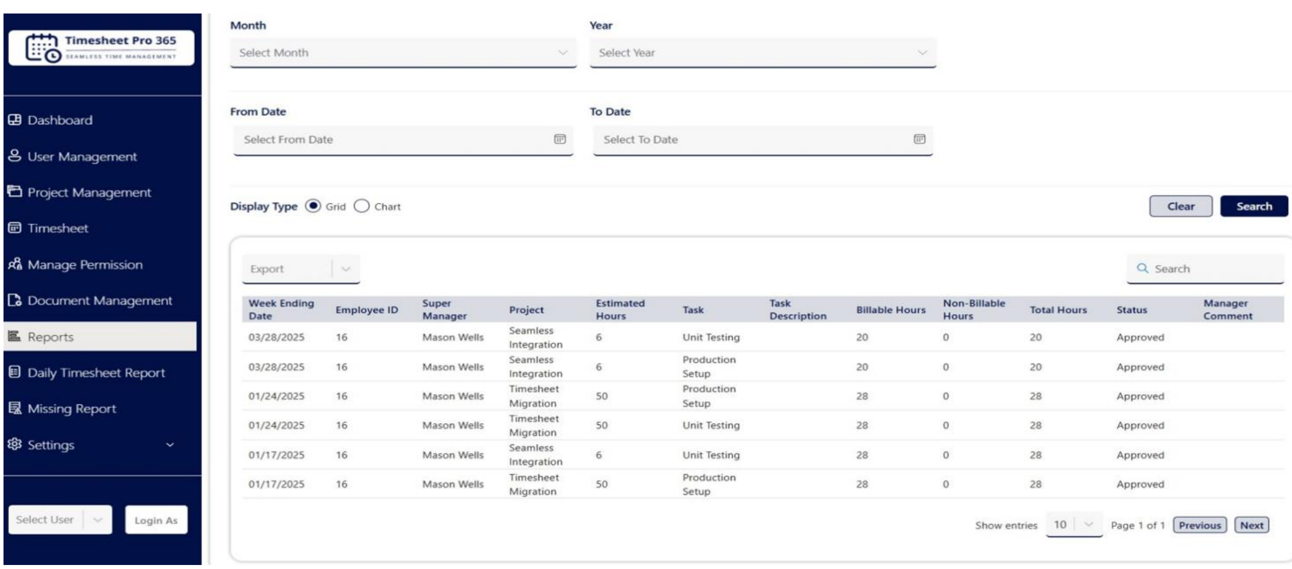

Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Select User
Login As
Document Management
Drag and Drop Files to upload
or
Browse
1
2
Export
Search
File Name
Delete
Tasks (8).xlsx
DailyTimesheetReport 3.tsx
Managers.xlsx
Holidays (1).xlsx
Show entries
5
Page 1 of 1
Previous
Next

Reports

1. **Available Filters:**
   Within the Reports section, you can use various filters, such as Super Manager, Manager Name, date range, employee name, project, and timesheet status.
2. **Generating Reports:**
   After applying the desired filters, click the Search button to generate the report.
3. **Exporting Reports:**
   When exporting reports, you can also filter by timesheet status. Ensure you select the required status filter as needed.



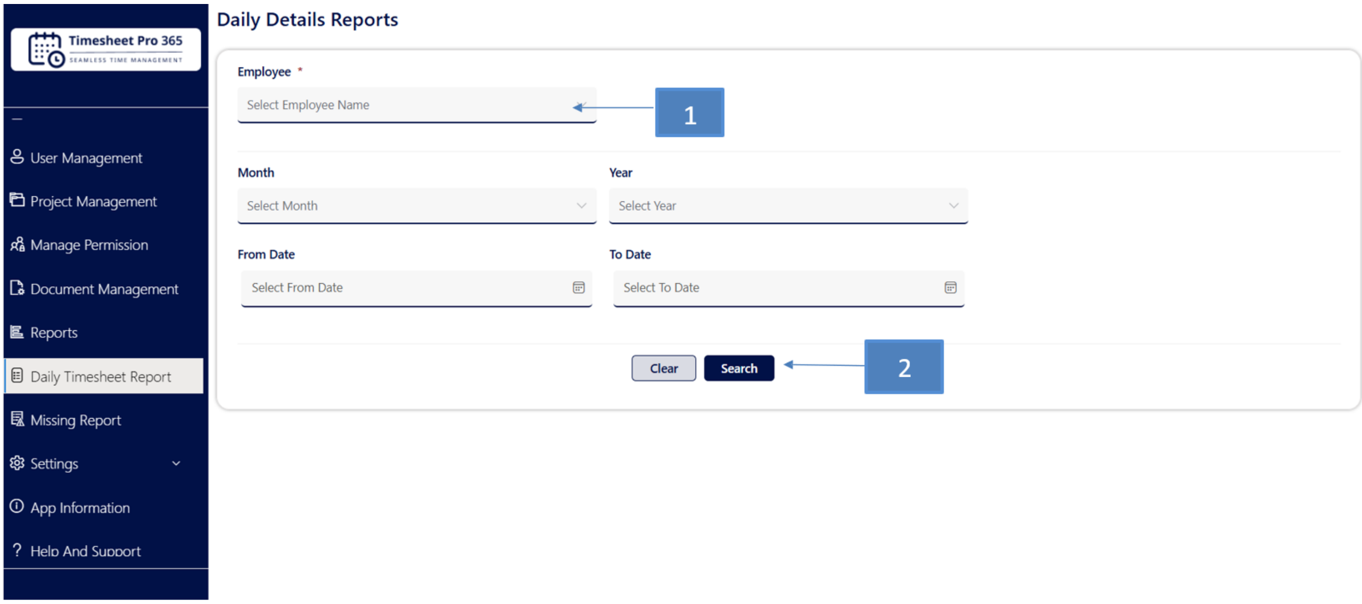
4. Grid View:
Reports will be displayed in a grid format according to the selected filters.



5. **Chart View:**
Additionally, reports can be viewed in a chart format based on the set filters.

Daily Timesheet Report

1. **Available Filters:**
   Within the Daily Timesheet Reports section, you can filter by Employee, Month, Year, From Date, and To Date.
2. **Generating Reports:**
   After selecting the desired filters, click the Search button to generate the report.



Missing Report

Overview

The **Missing Report** section helps track employees who have missed submitting their timesheets for any week. Only **Admin** and **Manager** users can access this section to view missing timesheets and send notifications to ensure timely submission.

Accessing the Missing Report

1. Log in to the system as an **Admin** or **Manager**.
2. Navigate to the **Missing Report** section from the menu.
3. Use the **Employee** filter dropdown to select one or multiple employees.
4. Click the **Search** button to generate the missing timesheet report for the selected employees.

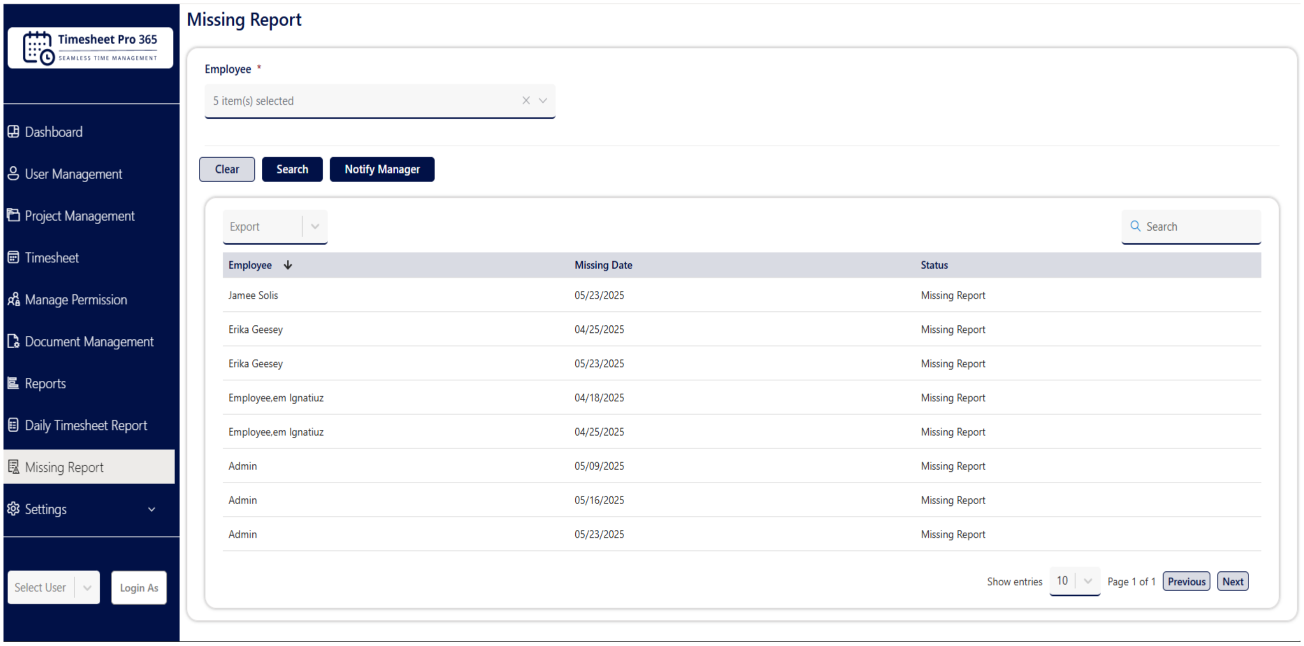
Sending Notifications for Missing Timesheets

To keep relevant users informed about missing timesheets for the last 3 months, Admins and Managers can send notification emails:

1. Notify Manager (Admin only)

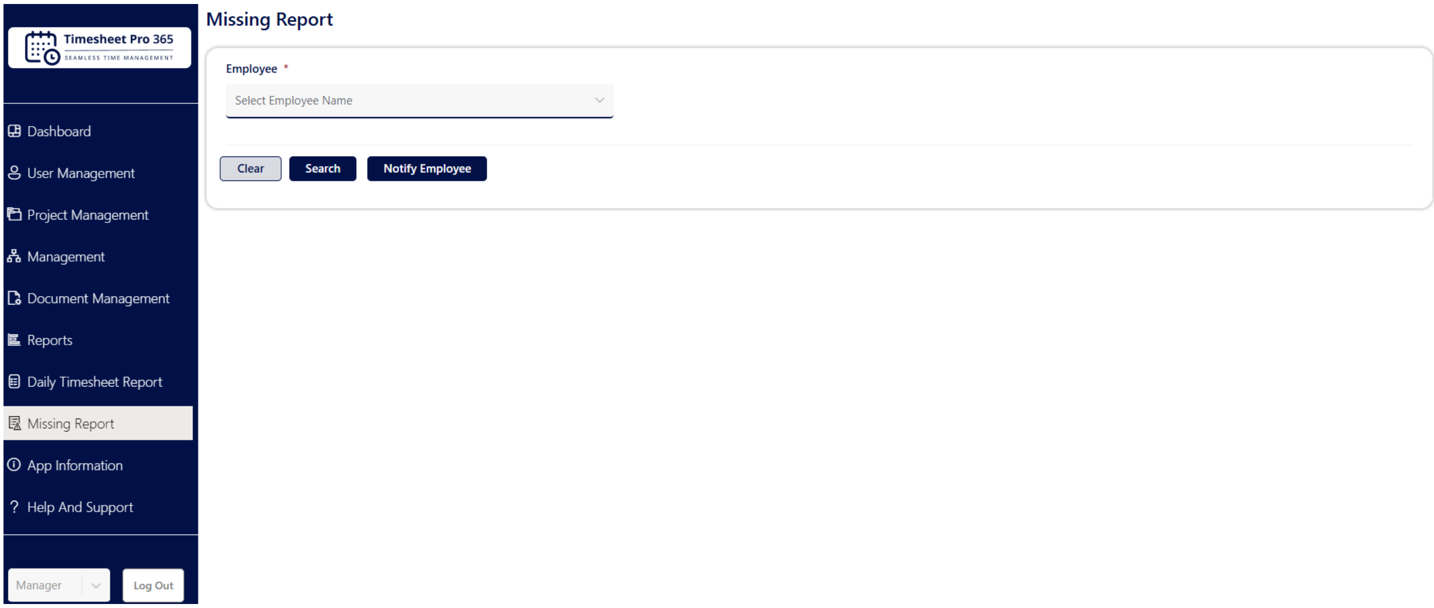
1. Select one or more employees from the dropdown.
2. Click the **Notify Manager** button.
3. The system will send an email notification to the respective **managers** of the selected employees.
4. The email will include:

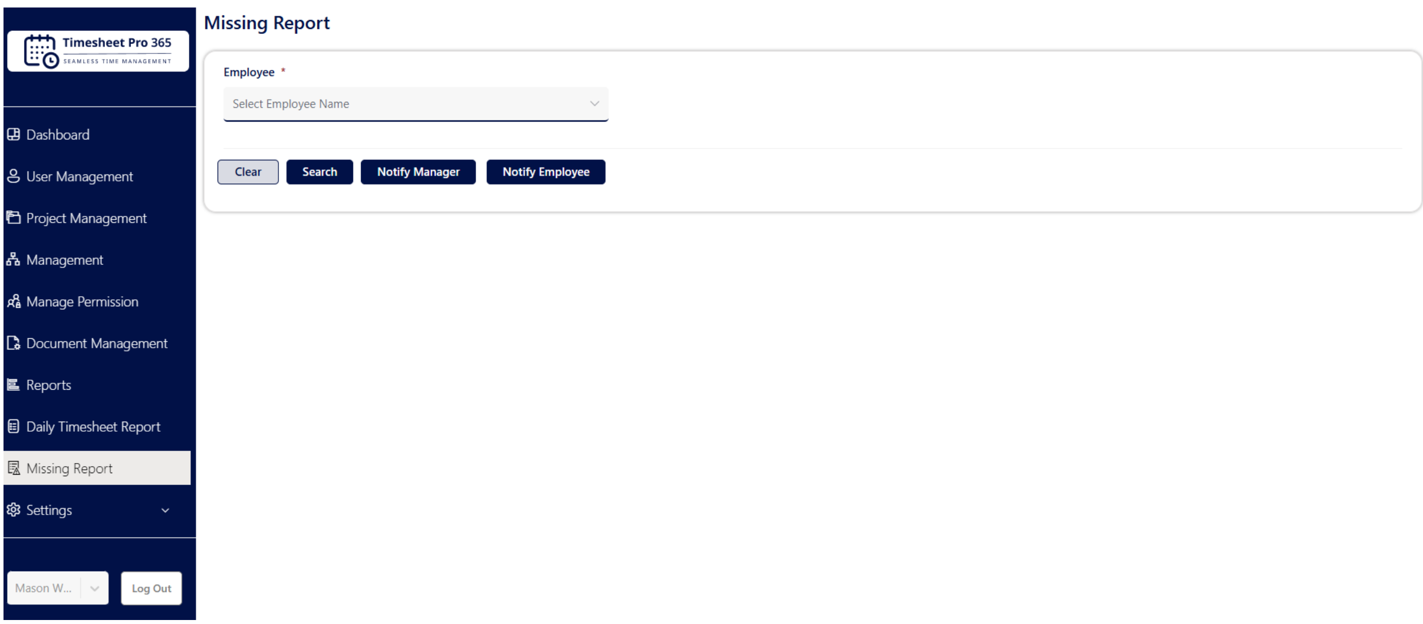
   - Names of the selected employees.
   - The week-ending dates of the missing timesheets within the last 3 months.



2. Notify Employee (Manager only)

1. Select one or more employees from the dropdown.
2. Click the **Notify Employee** button.
3. The system will send an email notification to the selected **employees**.
4. The email will include the week-ending dates of their missing timesheets from the last 3 months.


Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Management
Document Management
Reports
Daily Timesheet Report
Missing Report
App Information
Help And Support
Manager
Log Out
Missing Report
Employee *
Select Employee Name
Clear
Search
Notify Employee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Project Management
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Manage Permission
Document Management
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Daily Timesheet Report
Missing Report
Settings
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Log Out
Missing Report
Employee *
Select Employee Name
Clear
Search
Notify Manager
Notify Employee

Setting

On the settings page, an Admin can change the default week-ending day (Friday) to any other day if needed. The setting page will only be visible after the Pro version is upgraded by the Admin. Also, the setting page will be available only in the admin account.

General Setting

1. Select weekending date.
2. Select the Date format.
3. Click on the Save Button.

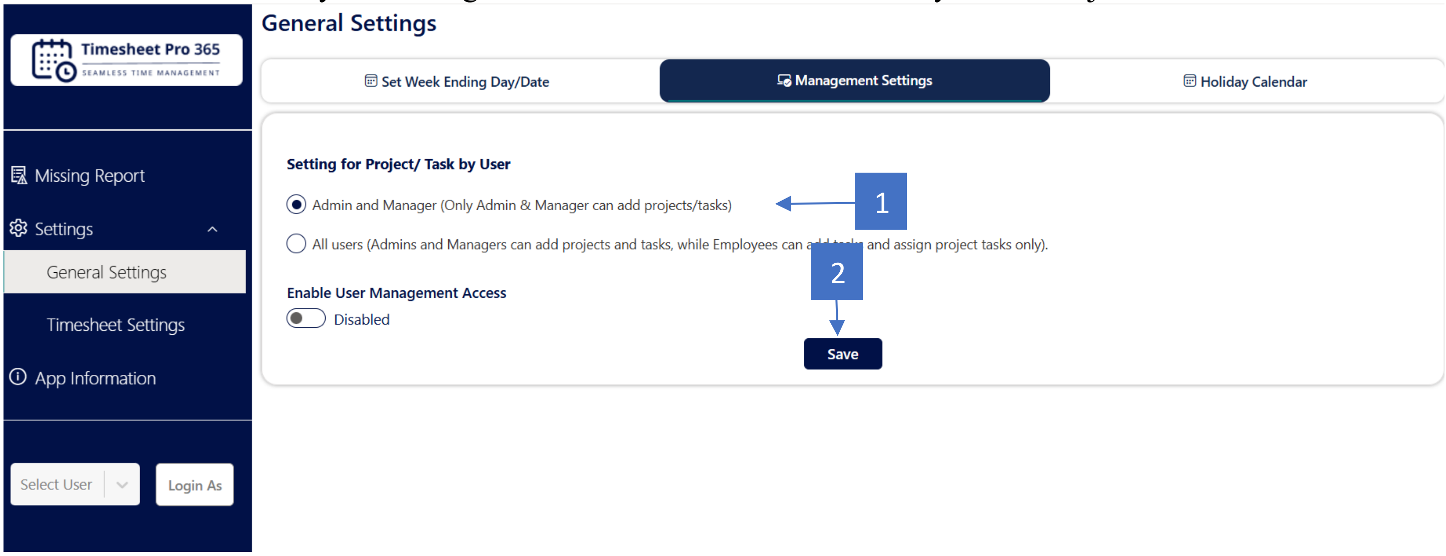
Management Setting

This setting controls who can add projects and tasks within the application. By default, all users have certain permissions, but admins can restrict task and project creation capabilities for employees.

1. By default, the selected option will be **All Users**, but if the admin wants that employee should not add a task in the application so now the admin can restrict this by selecting another option, that is Admin and manager only.

2. Click on save once the selection is done.

3. This will help the admin to apply restrictions on employees to add tasks in the application and from there onwards only the Manager and Admin will have the authority to add Projects and tasks.

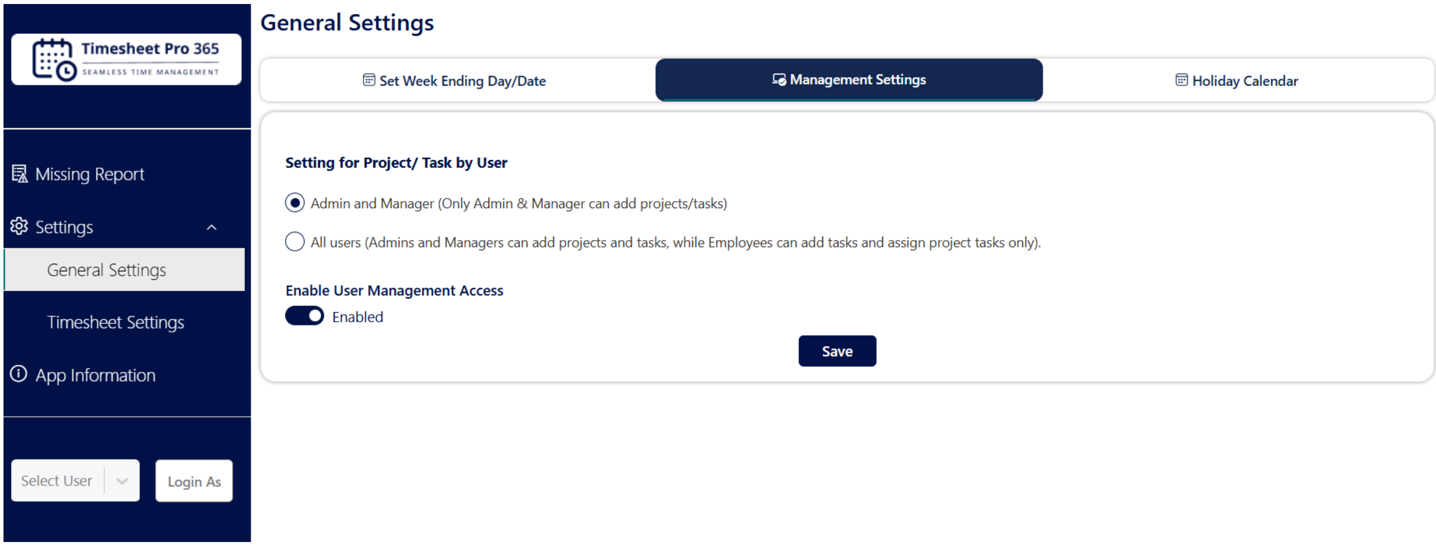


Enable User Management Access

The **Enable User Management Access** toggle controls the level of access managers have within the User Management module concerning admin and manager user permissions.

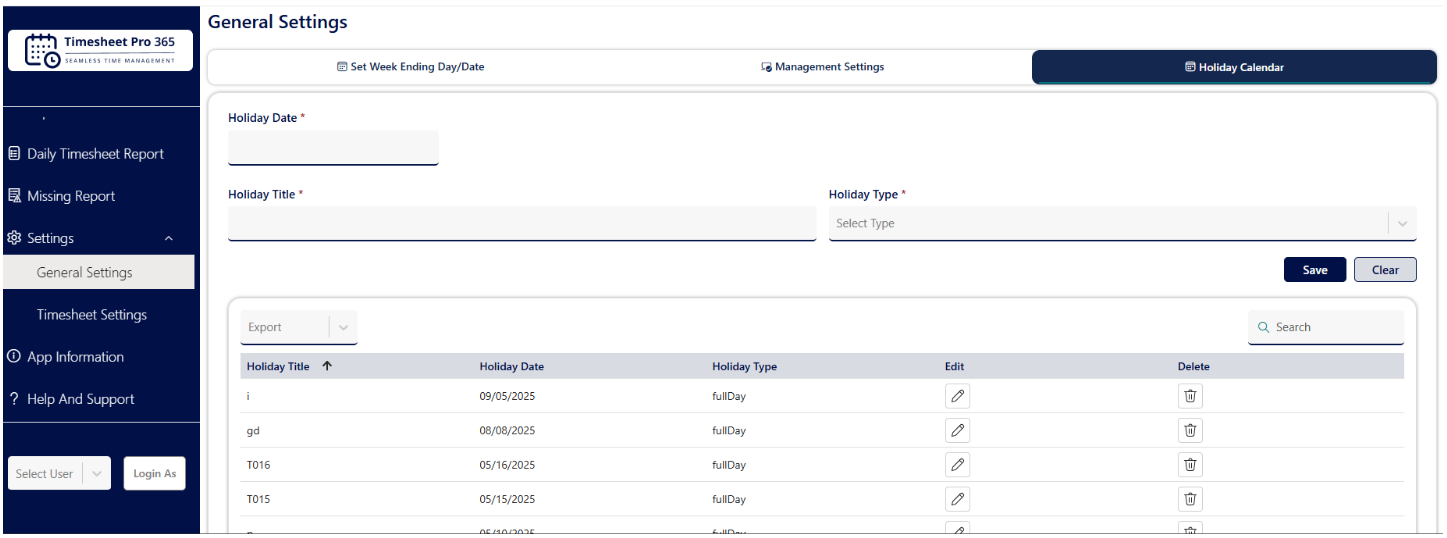
- **When Disabled:**
  Managers can modify user access rights for any admin or manager in the system. This broad permission may lead to potential security risks due to unrestricted access.
- **When Enabled:**
  Managers can only manage user access for employees specifically assigned to them. This restriction enhances security by limiting user management capabilities to direct reports.

Even when this toggle is enabled, managers **can add new employees** to the system.



Holiday Calendar Settings

1. A new Holiday Calendar tab is added under the **General Settings** menu for admin access.
2. Admins can add, edit, or delete holidays using a simple form connected to a SharePoint list. The form includes fields for **Date**, **Holiday Title**, and **Holiday Type**.
3. Admins can **save** the holiday to the SharePoint list or **clear** the form to reset fields.
4. Below the form, a **DataTable** displays all holidays fetched from the SharePoint list, showing **Holiday Title**, **Date**, **Type**, and options to **Edit** or **Delete** each entry.
5. Clicking the **Edit** icon loads the holiday data into the form for updating; saving updates the record in the SharePoint list.
6. Clicking the **Delete** icon removes the holiday from the SharePoint list and updates the DataTable.
7. On the **Timesheet** page, when users enter hours on a holiday date, a tooltip appears showing the holiday name followed by the word "holiday," alerting users that the selected date is a holiday.



Timesheet Settings

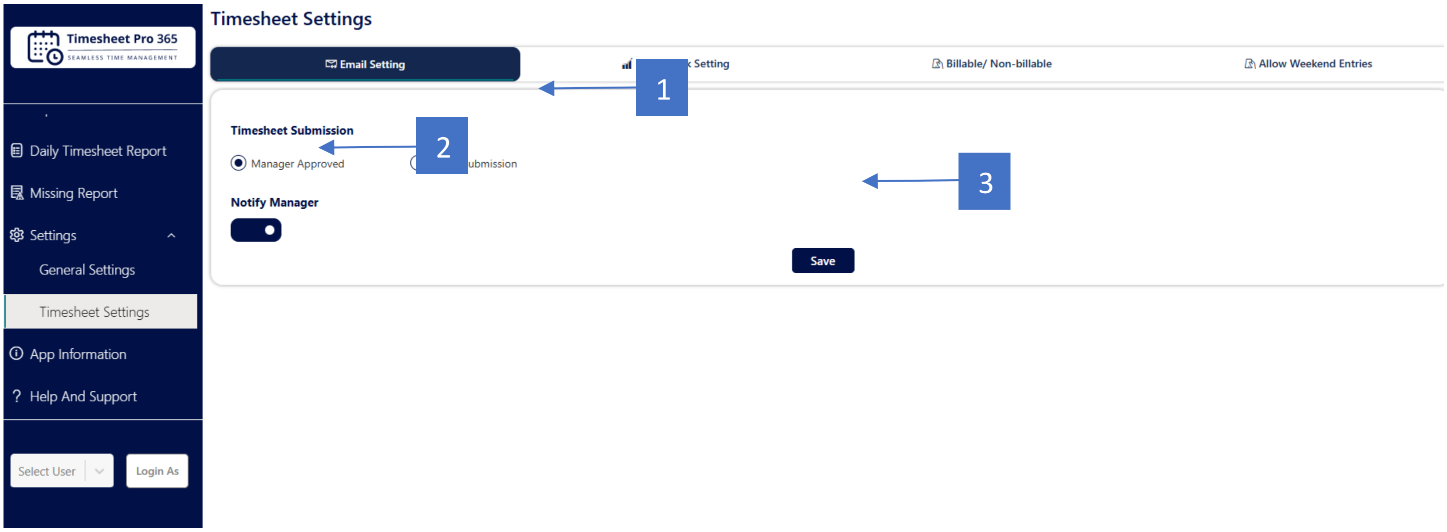
Email Setting

In the Timesheet Email Settings, you can configure how timesheet submissions are handled and notifications sent:

1. Choose whether timesheets require manager approval before submission or allow direct submission.

2. Enable this toggle to send an email notification to the manager for timesheet submissions or approvals.

3. Tap this button to save your changes to the timesheet email settings.



Benchmark Setting

The **Benchmark Setting** feature in Timesheet Pro 365 allows the admin to enforce daily hour limits on employee timesheets. This ensures accurate and consistent time logging by setting minimum and maximum thresholds for daily hours.

1. To make any changes to the benchmark settings, first tap the **Edit** button.

2. **Benchmark Minimum On/Off Toggle**

   - Use this toggle switch to enable or disable the **Benchmark Daily Minimum Hours** setting.
   - When turned **ON**, employees must log at least the minimum number of hours specified each day.
   - When turned **OFF**, there will be no minimum daily hours restriction.

3. **Benchmark Daily Maximum Hours**

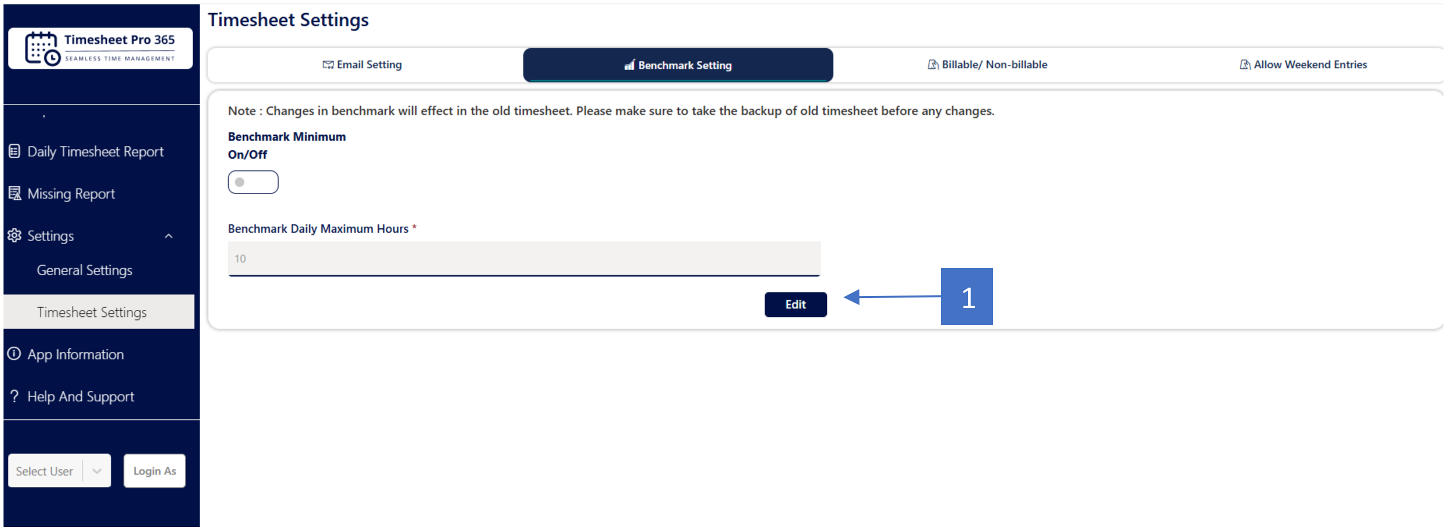
   - Enter the maximum number of hours an employee can log daily.
   - For example, if set to **10**, employees cannot log more than 10 hours in their timesheets for any single day.
   - If the employee tries to exceed this limit, a validation error will be triggered.

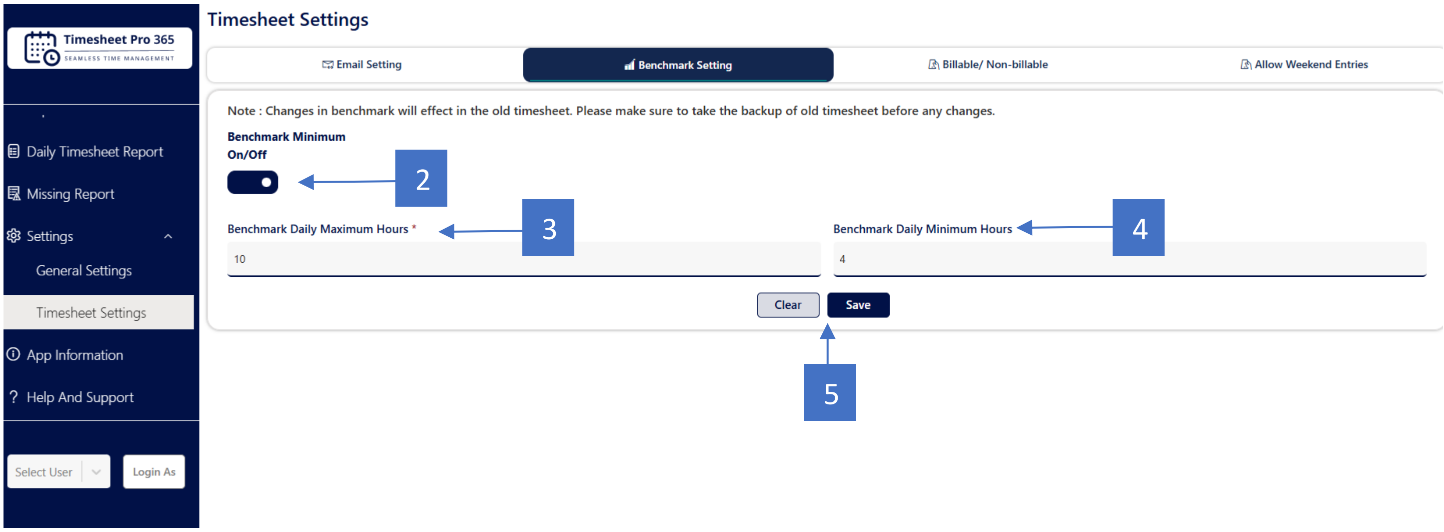
4. **Benchmark Daily Minimum Hours**

   - Enter the minimum number of hours an employee must log per day (this is effective only if the minimum benchmark is enabled).
   - For example, if set to **4**, employees must log at least 4 hours daily.
   - Entries below this minimum will trigger a validation error to ensure employees log sufficient time.

5. **Save and Clear Buttons**

   - After configuring the desired benchmark settings, click the **Save** button to apply the changes.
   - Click clear to reset all values.
   - **Note:** Changes to benchmark settings will affect existing timesheets. It is highly recommended to backup old timesheet data before making any changes to avoid data loss or discrepancies.


Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Daily Timesheet Report
Missing Report
Settings
General Settings
Timesheet Settings
App Information
Help And Support
Select User
Login As
Timesheet Settings
Email Setting
Benchmark Setting
Billable/ Non-billable
Allow Weekend Entries
Note : Changes in benchmark will effect in the old timesheet. Please make sure to take the backup of old timesheet before any changes.
Benchmark Minimum
On/Off
Benchmark Daily Maximum Hours *
10
Edit
1


Timesheet Pro 365
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Daily Timesheet Report
Missing Report
Settings
General Settings
Timesheet Settings
App Information
Help And Support
Select User
Login As
Timesheet Settings
Email Setting
Benchmark Setting
Billable/ Non-billable
Allow Weekend Entries
Note : Changes in benchmark will effect in the old timesheet. Please make sure to take the backup of old timesheet before any changes.
Benchmark Minimum
On/Off
2
Benchmark Daily Maximum Hours *
3
Benchmark Daily Minimum Hours
4
10
4
Clear
Save
5

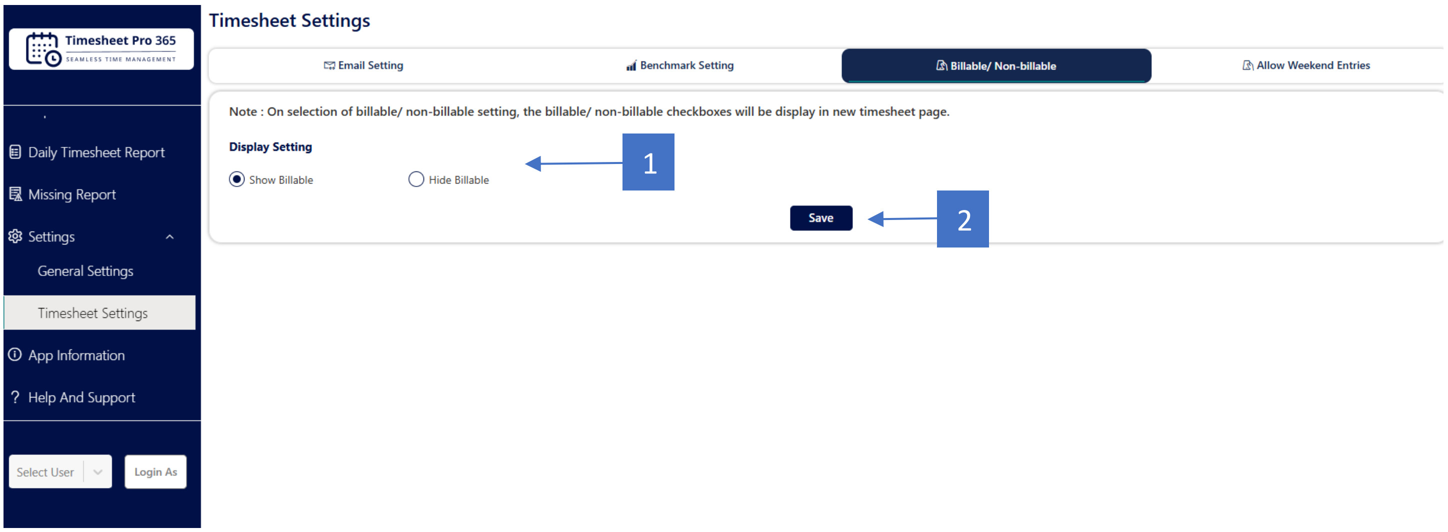
Billable/Non-Billable Setting

When you select an option, the billable/non-billable checkboxes will appear or disappear on new timesheet pages accordingly.

1. Billable Checkbox Display Options:

- **Show Billable:** Enables the Billable checkbox on timesheets, allowing users to mark hours as billable or non-billable.
- **Hide Billable:** Removes the Billable checkbox from timesheets, preventing users from marking billable hours.

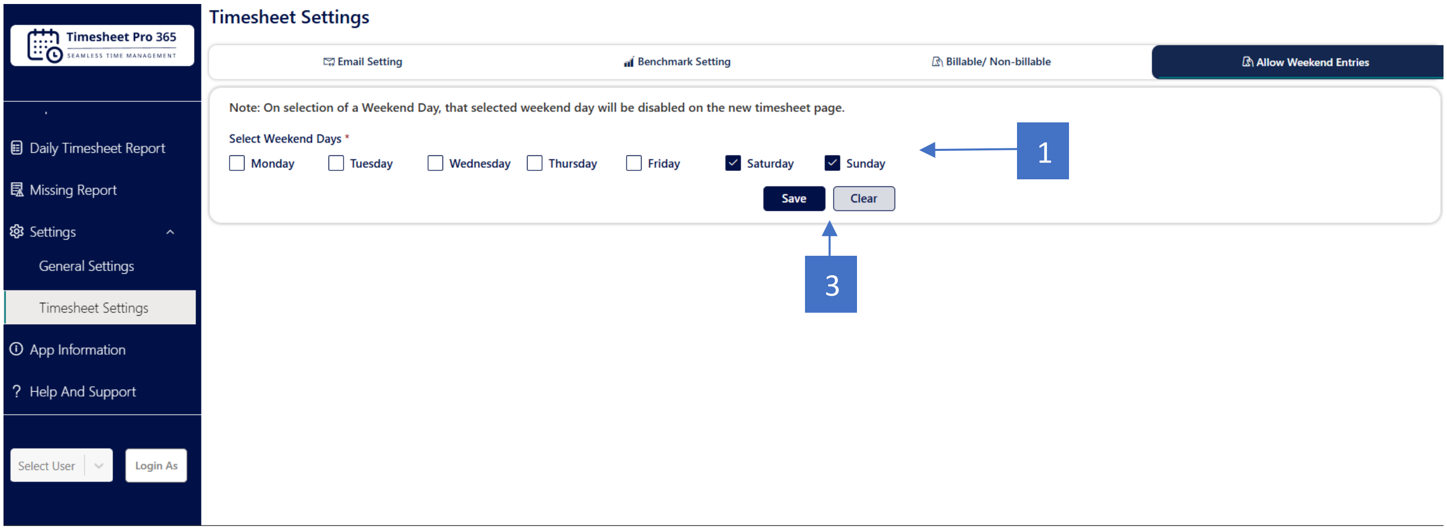
2. Save Settings: Click **Save** to apply your selection. This setting will affect all new timesheet entries going forward.



Weekend Time Entry Settings

The Weekend Time Entry Settings feature in Timesheet Pro 365 allows the admin to control which weekend days employees are permitted to log time. This helps enforce organizational policies by disabling time entries on selected weekend days.

1. **Select Weekend Days**
   - Use the checkboxes to select which days of the week are considered weekend days.
   - For example, selecting **Saturday** and **Sunday** marks these as weekend days where time entry will be restricted.
2. **Effect of Selection**
   - When a weekend day is selected, that day will be **disabled** for time entry on the **New Timesheet** page.
   - Employees will **not be able to log hours** for these disabled weekend days in their timesheets.
3. **Save and Clear Buttons**
   - Click **Save** to apply the selected weekend day settings.
   - Click **Clear** to reset all selected days to none.
4. **Note**
   - This setting enforces weekend work policies by preventing timesheet submissions on designated weekend days.

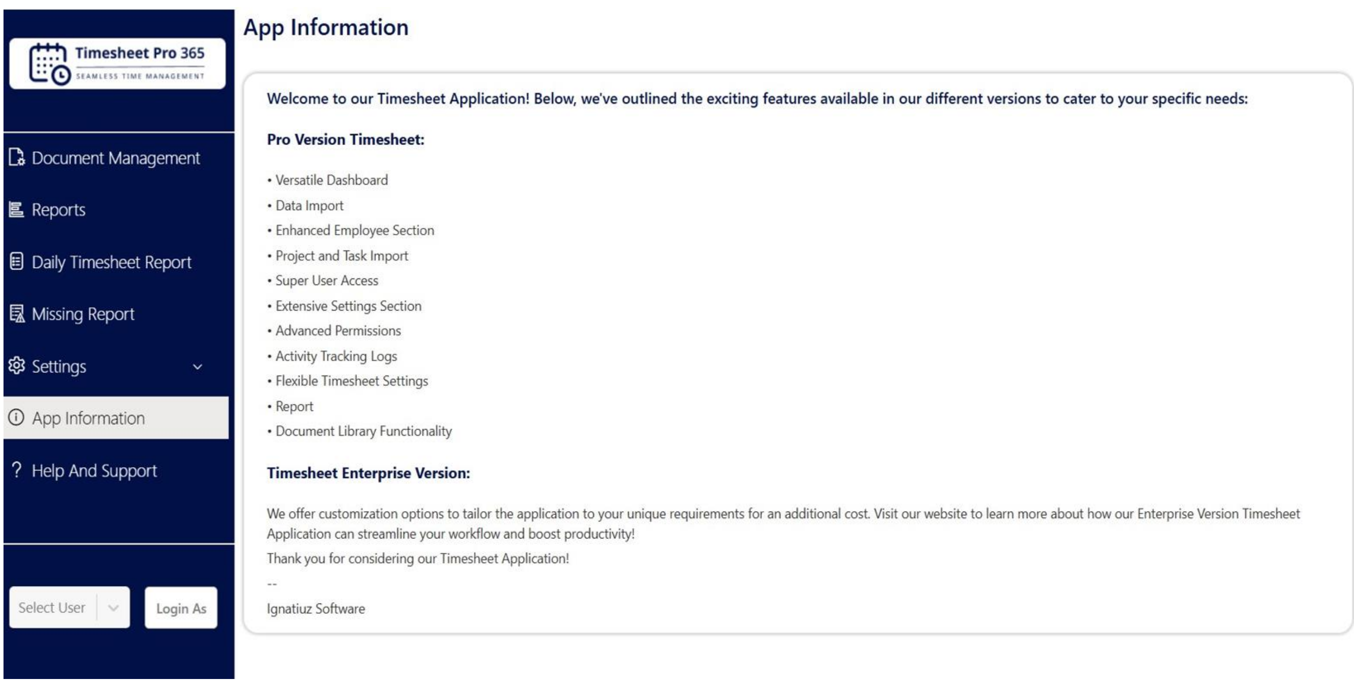


App Information

Welcome to our Timesheet Application! Below, we've outlined the exciting features available in our different versions to cater to your specific needs:

Pro Version Timesheet:

1. **Versatile Dashboard:** Comprehensive view of key metrics and activities.
2. **Data Import:** Import data from various sources effortlessly.
3. **Enhanced Employee Section:** Advanced features for detailed employee management.
4. **Project and Task Import:** Simplify project and task setup with import capabilities.
5. **Super User Access:** Access advanced settings and features.
6. **Extensive Settings Section:** Customize various application aspects.
7. **Advanced Permissions:** Granular control over user permissions.
8. **Activity Tracking Logs:** Monitor and log user activities for better oversight.
9. **Flexible Timesheet Settings:** Adapt timesheet settings to business requirements.
10. **Detailed Reports:** Generate customizable and detailed reports.
11. **Document Library Functionality:** Manage and store documents easily within the application.



1. **FAQs**
    - Visit the **Frequently Asked Questions (FAQ)** section to find quick answers to common questions related to using the application.
2. **User Manual Link**
    - For a more comprehensive guide on using the Microsoft 365 Timesheet (Office and SharePoint App), refer to our detailed **User Manual**.
    - Click the link for more detailed instructions on how to use the app.
3. **Contact Support**
    - If you encounter any issues with configuration, access, or other difficulties, visit our **client support portal** for personalized assistance.
    - For any questions or issues with the application, please reach out through our **Client Support Portal**.
4. **Feedback**
    - We truly value your feedback! Please share your suggestions, report any issues, or provide general feedback to help us improve the application and better meet your needs.

Help and Support

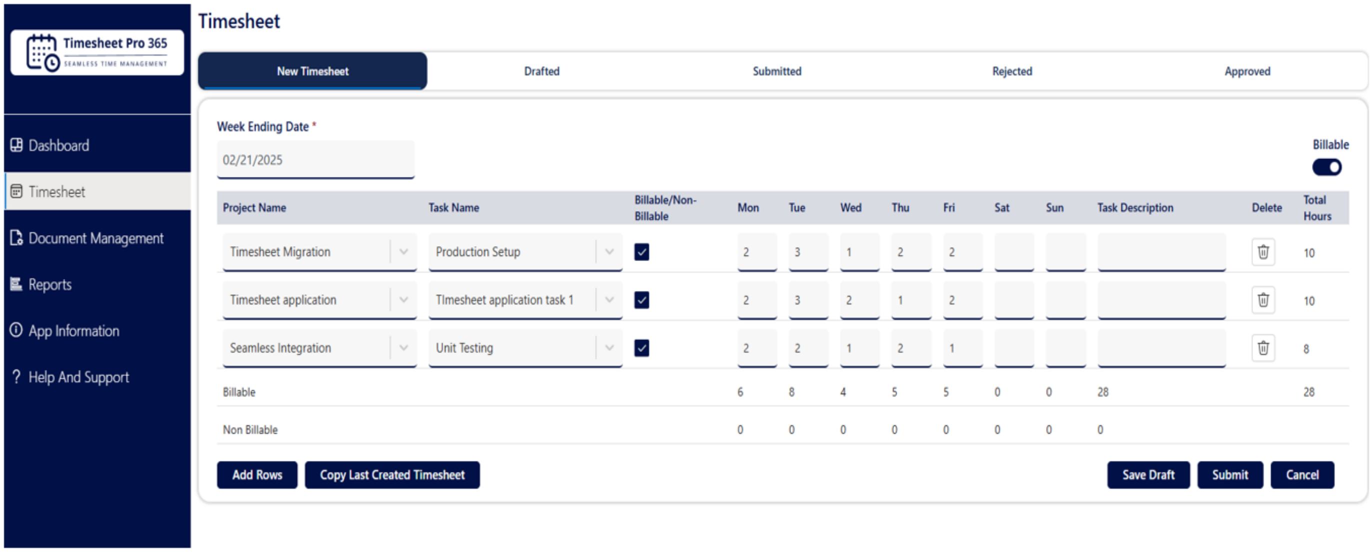
We are committed to providing you with a seamless and efficient experience while using our Timesheet Application. Below are several resources to assist you:

Create New Timesheet

Only Super Managers and employees can create their timesheets. Navigate to the New Timesheet tab.

1. Click on the Week ending date text box to open the calendar.
2. Select the week-ending date from the calendar.
3. If the billable toggle is enabled, all checkboxes will be selected; if disabled, all checkboxes will be unselected.
4. Select the Project from the project dropdown.
5. If there are many tasks associated with the project, enter the project and task name in the search box for easy selection.
6. Select the Task from the task dropdown.
7. The Billable and Nonbillable sections will show the total hours added for each day.
8. Add the number of hours spent on the task for each day of the week.
9. Add descriptions/comments if needed in the description box.
10. Click on the **Add rows** button to add new rows if required.
11. Click Copy Last Created Timesheet to view the last created timesheet.
12. Click **Save draft** to save the data and allow editing the timesheet later.

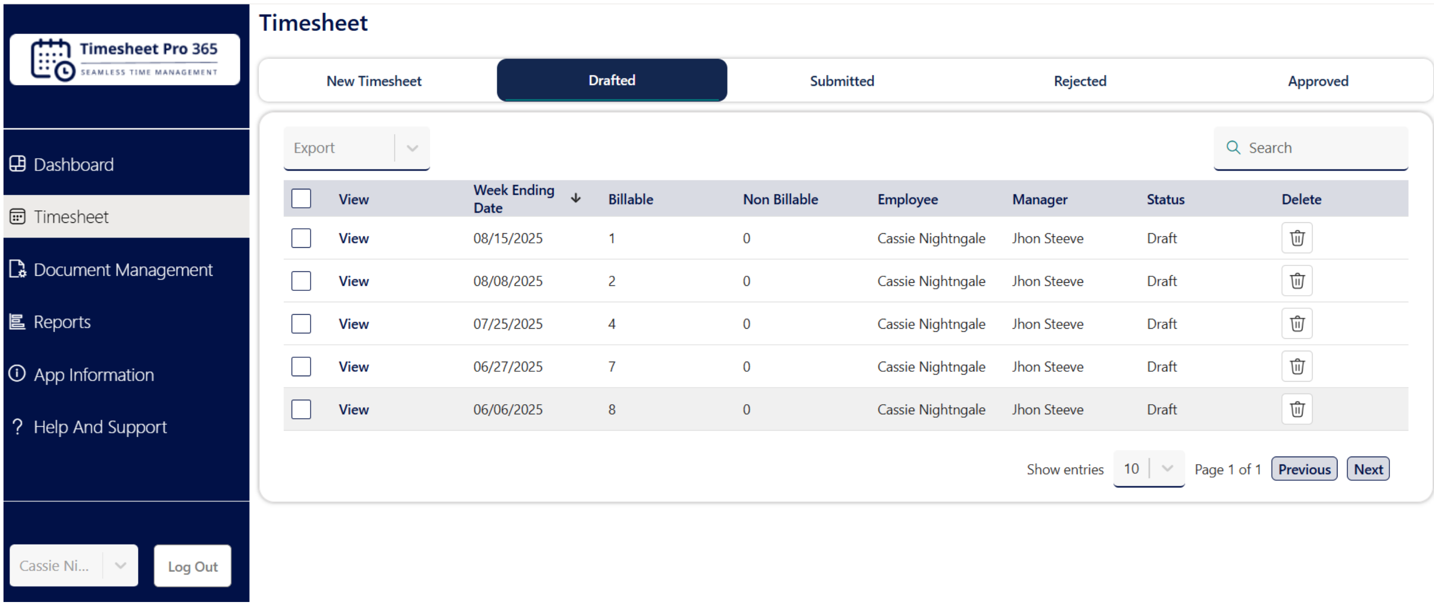
New Timesheet



View All Drafted, Submitted, Rejected, and Approved Timesheets:

1. Drafted: Can view draft timesheets and modify them again.
2. Submitted: Displays all submitted timesheets.
3. Rejected: Shows all timesheets rejected by the manager.
4. Approved: Shows all timesheets approved by the manager.

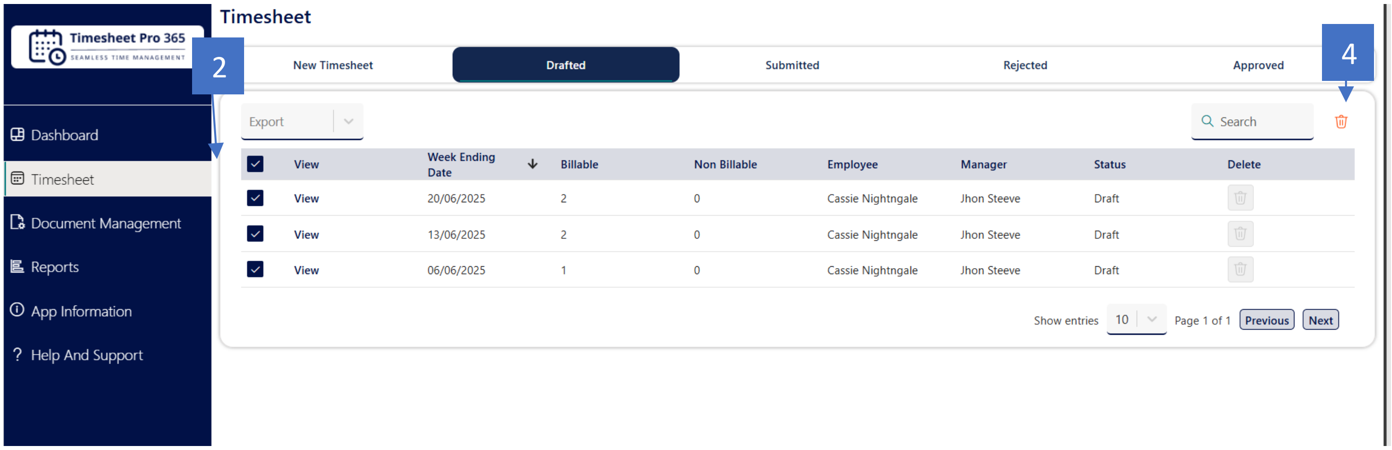
Drafted Timesheets



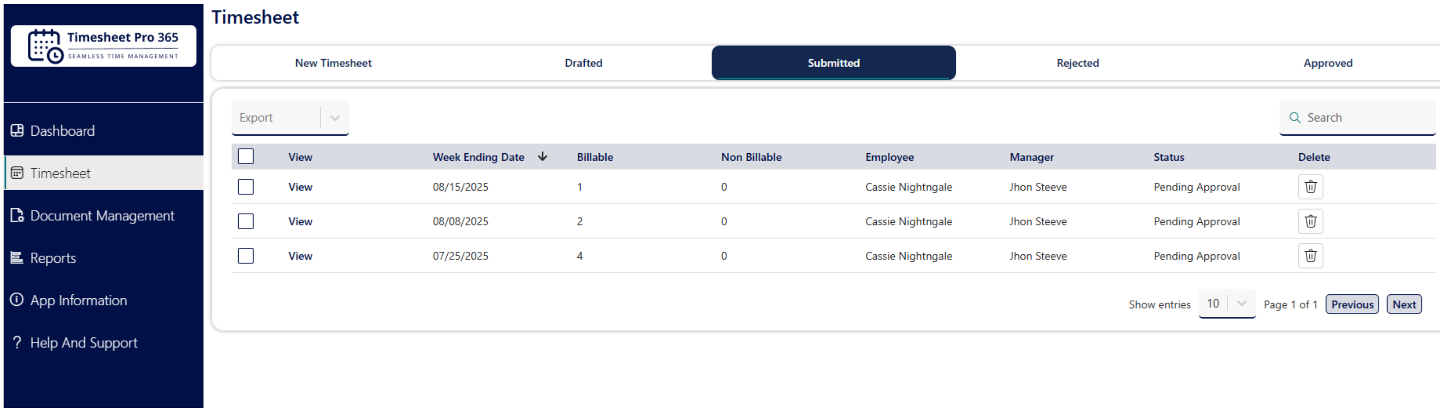
Draft Timesheets – Bulk Delete

The Bulk Delete feature in Draft Timesheets allows employees to remove multiple timesheets at once efficiently.

1. Navigate to the **Timesheet** section.
2. In the timesheet list, select the checkboxes for **two or more** timesheets you wish to delete.
3. Once multiple timesheets are selected, the **Bulk Delete option** will appear at the top-right corner of the list.
4. Click the **Bulk Delete option** to remove all selected timesheets.
5. Confirm the deletion in the pop-up dialog to complete the process.



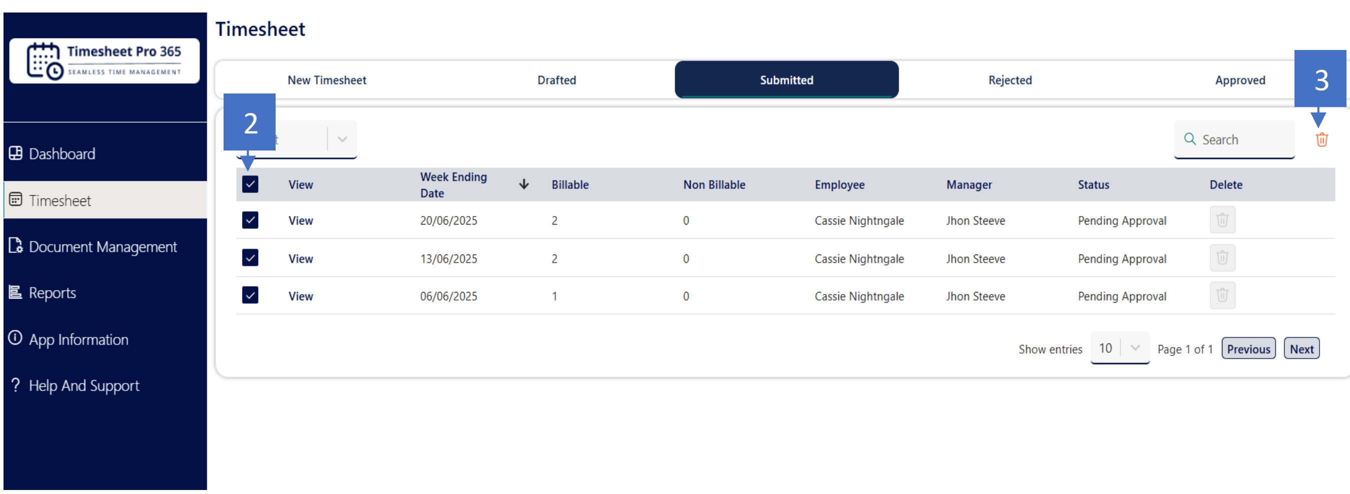
Submitted Timesheets



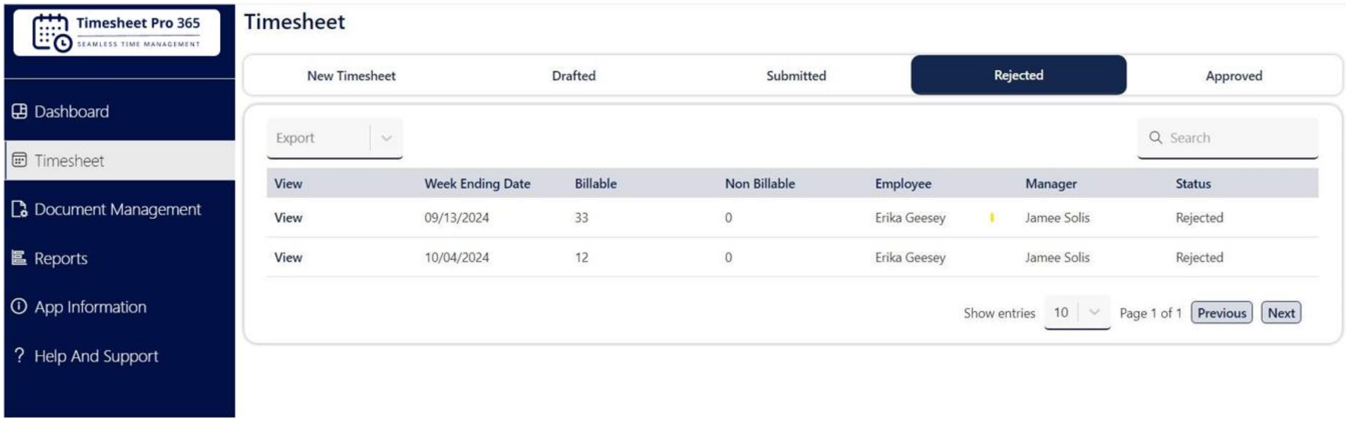
Submitted Timesheets – Bulk Delete

The Bulk Delete feature in Submitted Timesheets allows employees or managers to efficiently delete multiple submitted timesheets if corrections or removals are necessary.

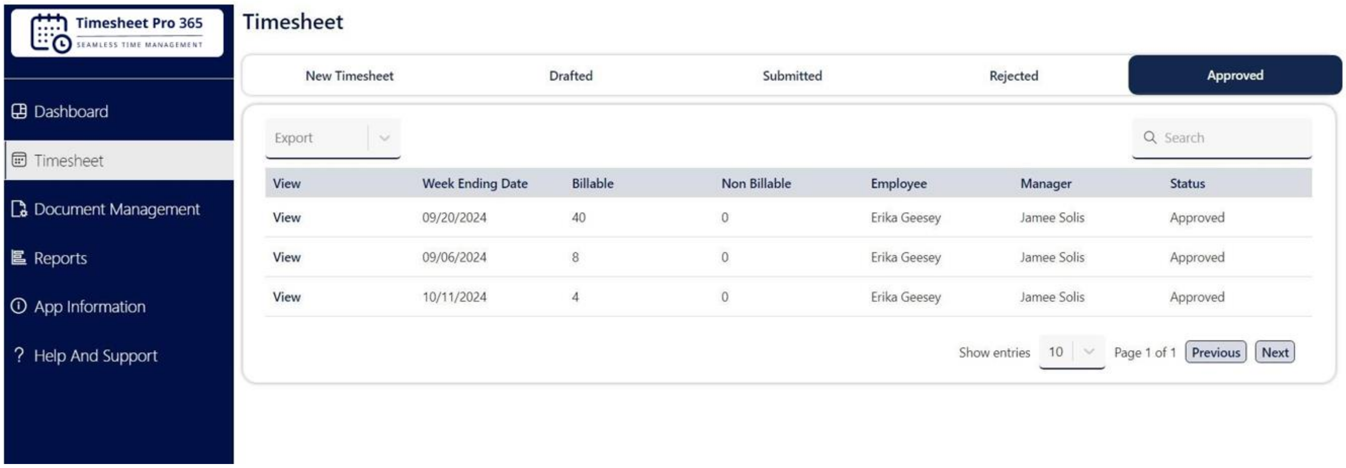
1. Navigate to the **Submitted Timesheets** section.
2. In the list of submitted timesheets, select the checkboxes for **two or more** timesheets you want to delete.
3. Once multiple timesheets are selected, the **Bulk Delete option** will appear at the top-right corner of the list.
4. Click the **Bulk Delete option** to delete all selected timesheets.
5. Confirm the deletion in the pop-up dialog to complete the process.



Rejected Timesheets



Approved Timesheets



Management – Approval and Rejection of Timesheet

The management portal views all the submitted employee timesheets and their status. Management - Can see

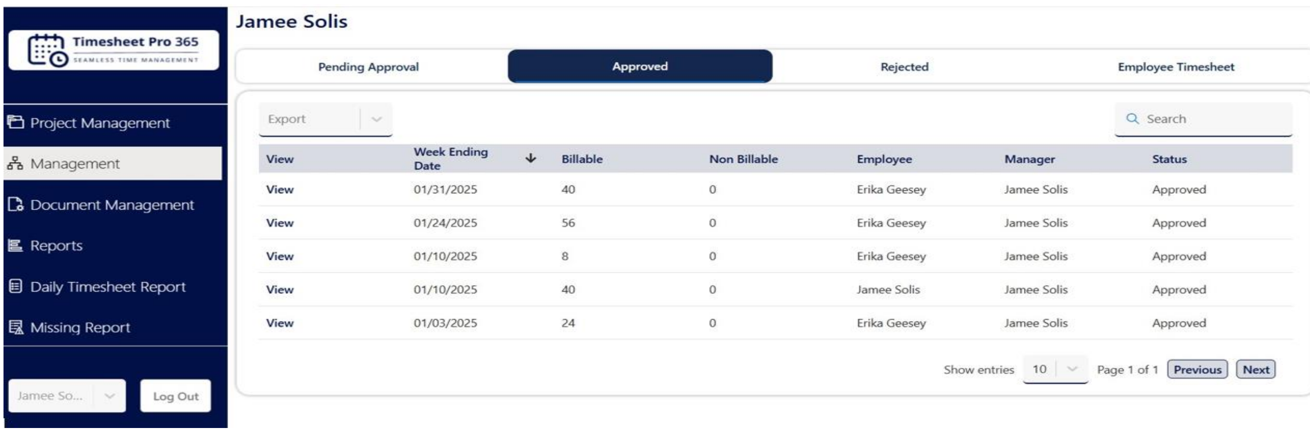
assigned employee-submitted timesheets.

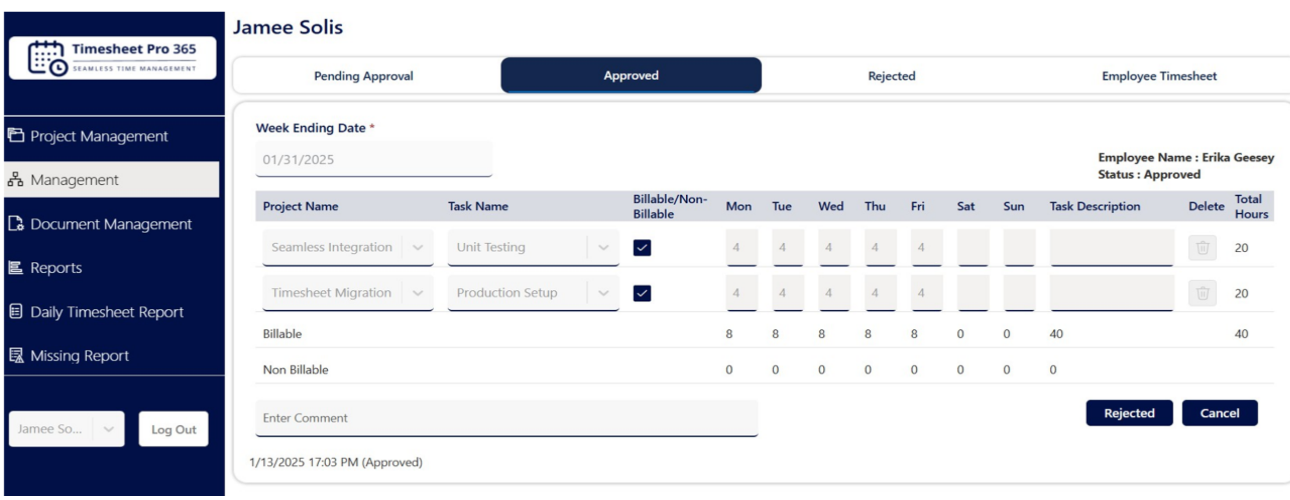
1. Pending – Will show a pending timesheet that is pending approval.
2. Approved– Will show all the approved timesheets.
3. Rejected – Will show all the rejected timesheets.
4. Employee Timesheet – Will show all timesheets of the employee.

Pending Approval

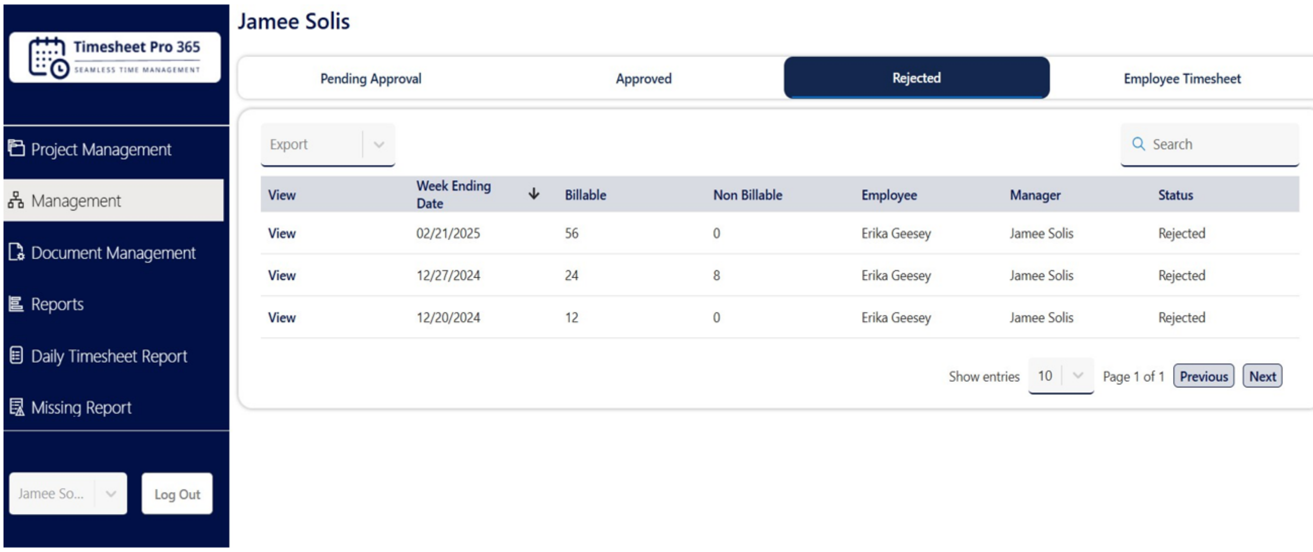
Approved Timesheets

1. Navigate to the Pending Approval timesheet to view any timesheet for approval or rejection.
2. Enter Manager Comments.
3. Approve or Reject Timesheet.

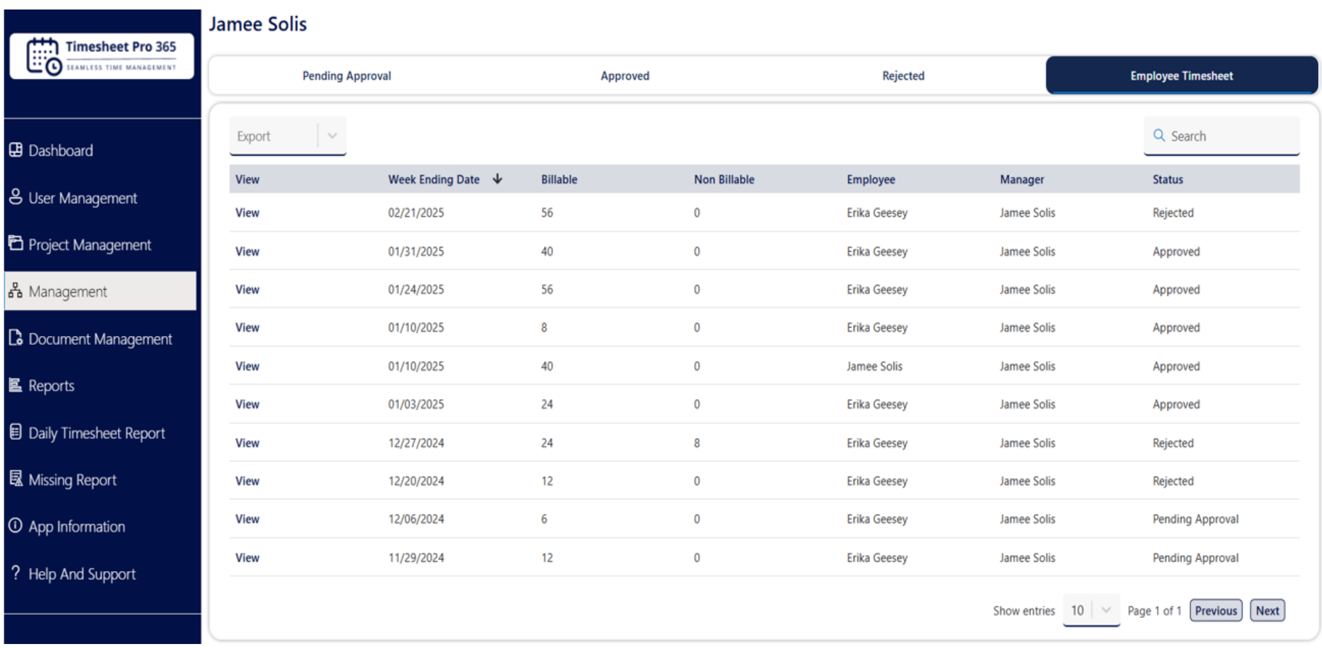




Rejected Timesheets

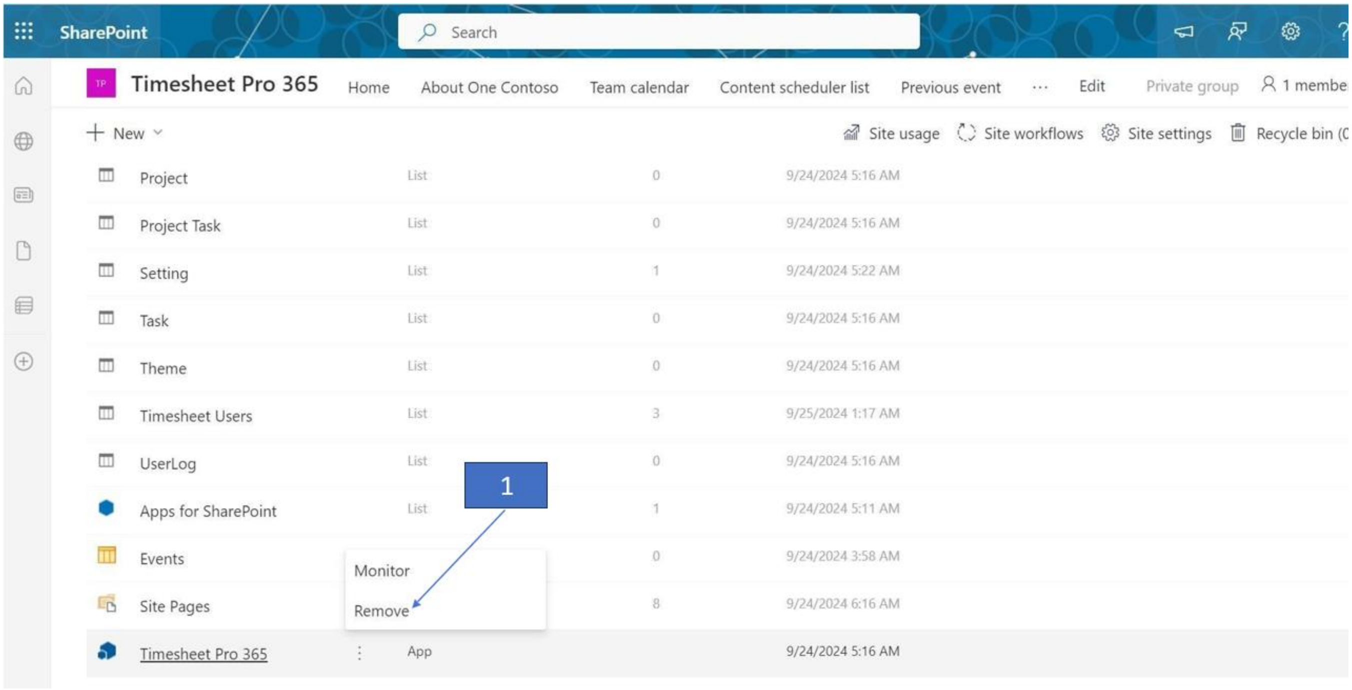


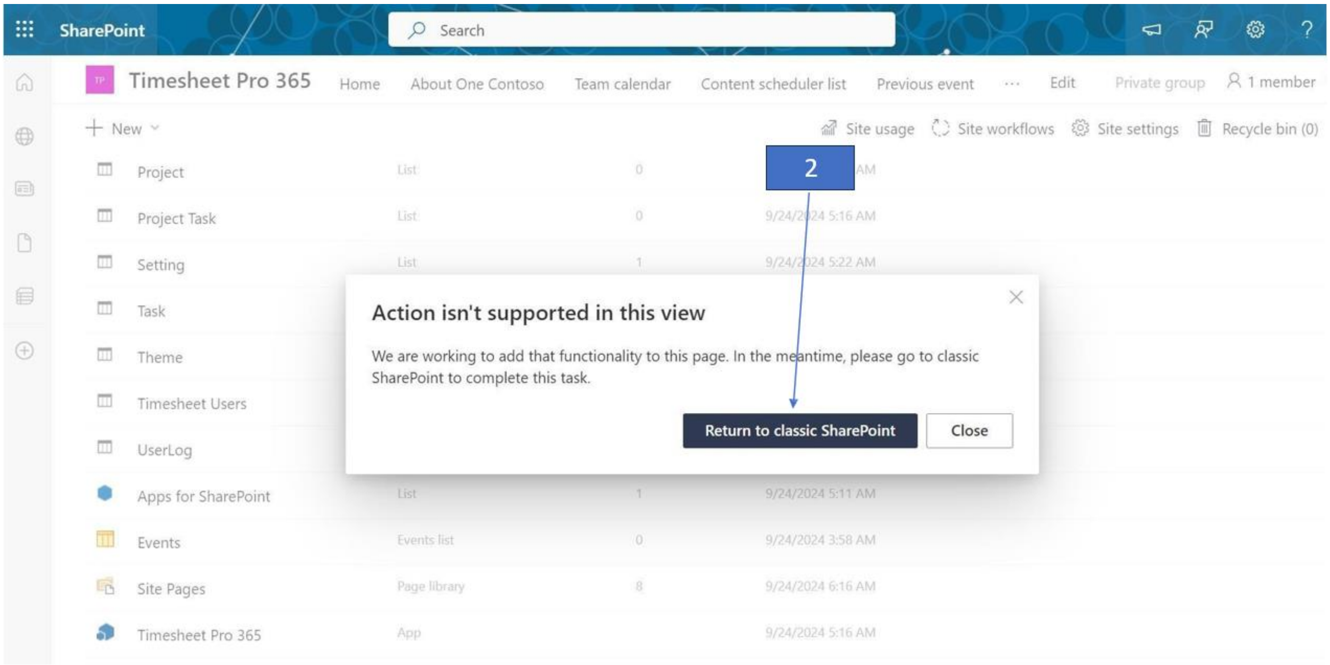
Employee Timesheets



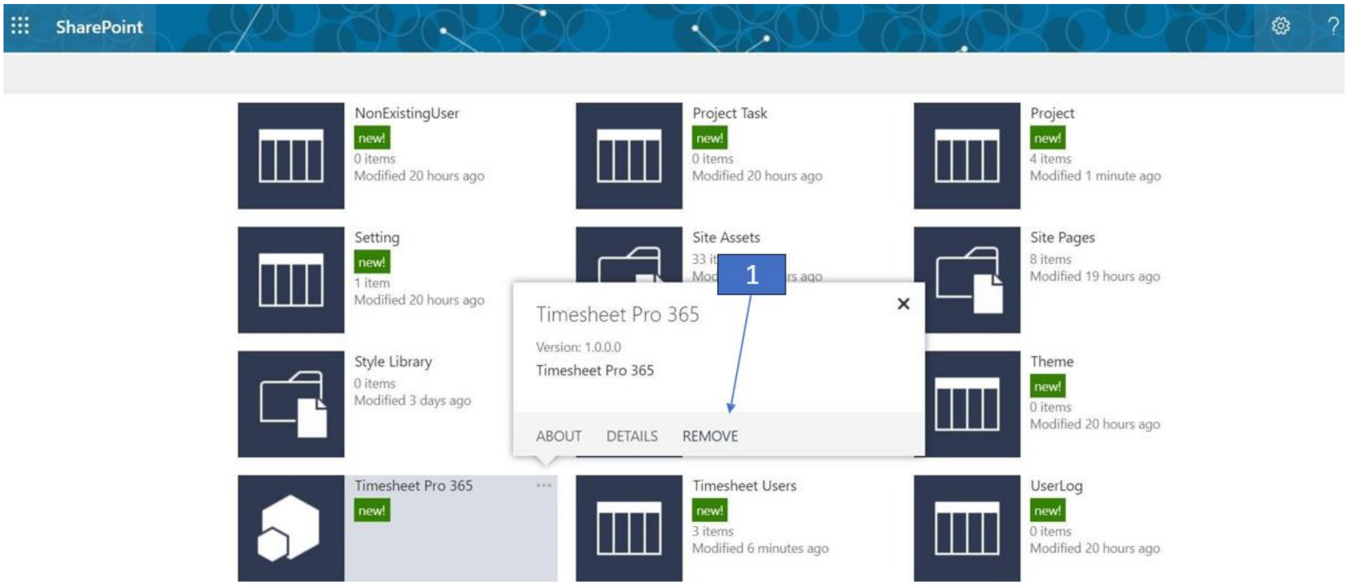
How to delete the application from the site?

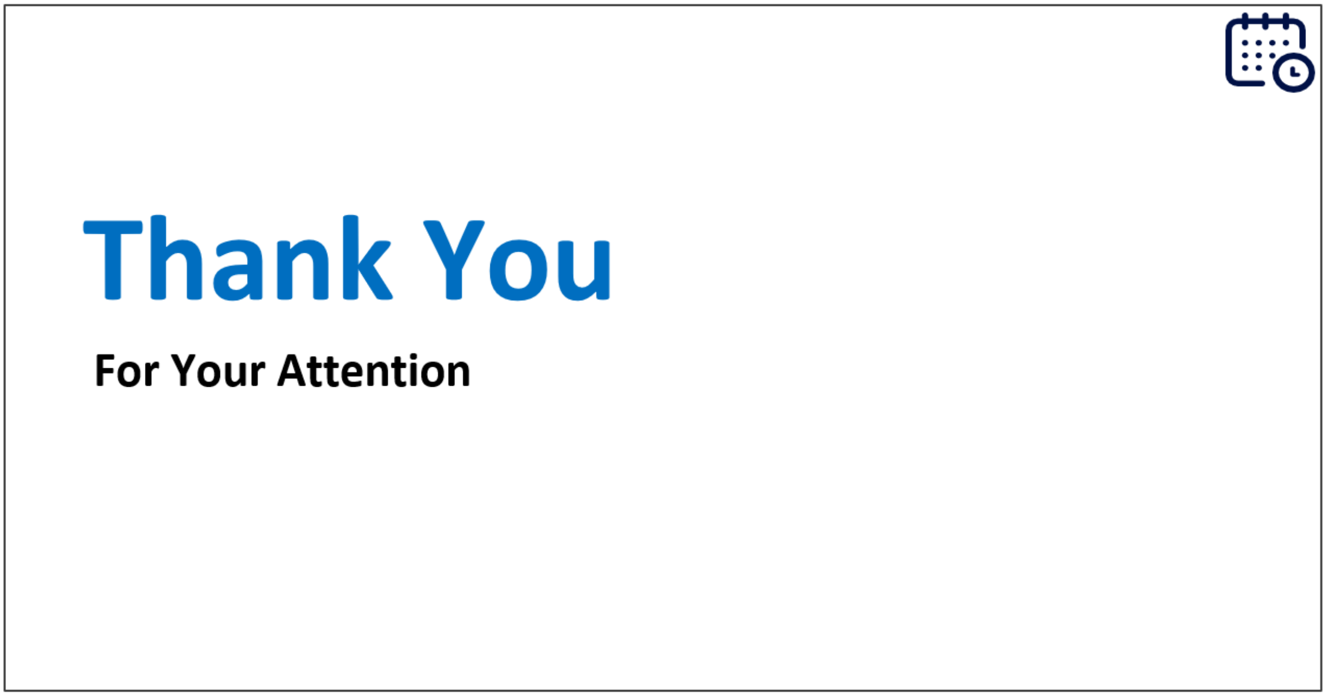
1. Navigate to Site Contents by clicking on the Settings (gear icon) located in the top right corner of the page.
2. Select Site Contents from the drop-down menu.
3. In the Site Contents page, locate the app you want to delete. App are typically listed along with other content like document libraries and lists.
4. Click on the ellipsis (...) next to the app name. A drop-down menu will appear with several options.
5. Select Remove from the menu.
6. To revert to Classic SharePoint, click on the link **Return to Classic SharePoint** located at the bottom left side of the page.





7. Find the Timesheet Pro 365 app and click on three dots.
8. Click on three dots.
9. Click on Remove.




Thank You
For Your Attention