# LTAPPS Timesheet

## User guide

Version 1.0

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# LTAPPS Timesheet

**LTAPPS Timesheet is a time tracking app that works with SharePoint & Microsoft Teams**

## Overview

LTAPPS Timesheet is a time-tracking app that works with SharePoint & Microsoft Teams(Including mobile). The app offers a solution to allow you to track your work time. The app helps you track & manage how much time you/your employee spend on projects. The employee/manager is able to easily track the regular work hours, overtime, or absences

The app allows to the export of employee's timesheets to an excel file with exactly the day/hour employees spend

# Submit the timesheet



Follow the steps below

- Open the app on the SharePoint page or MS Teams
- In the home page > My Timesheets tab, click on the Submit Timesheet button



- In the timesheet form of the right panel,
    - Select the week number in the Select Week dropdown
    - Select the department (The system auto-populates if your profile is set in the employee list)
    - Click on the Add Attachment link. In the popup appearing, select the file that you want to add
    - Click on
        - New Row: To add the timesheet for the project
        - New Absences: To add the timesheet for the absences
    - Input hours for each day
    - Input other fields such as "Is Billable", "Is Overtime", …
    - If you want to delete the line, click on the Delete icon at the right of the line
- If you don't want to submit the request yet, click on the Save Draft button

- Choose the next approver & click on the Submit button

## Approve/Reject the timesheet



Follows the steps below

- Open the app, switch to the My Task tab, click on the Approve icon (under the detail column) or click on the link on the email notification to open the Approval form

| Detail | Employee | Department | Week Number | From Date | To Date | Step | Status | Total Hours | Request Mode |
|---|---|---|---|---|---|---|---|---|---|
| | Adele Vance | IT | 46 | 11/14/2022 | 11/20/2022 | Line Manager | Pending Ap... | 40 | New |

- In the Approval form of the right panel
- Review the timesheet
  - Click on the Detail button at the right of the Progress Steps section to check more details of the information process
  - Click on the Absences Details button at the right bottom of the Timesheet Details section to check the balance's employee
- Input your comment
- Click on the Approve button if the timesheet is okay with you
- Click on the Reject button if the timesheet needs to update

# Adjust the timesheet



When the timesheet is completed, and you want to adjust it. Follow the steps below

- OnIn the Home page, click on the Adjust Timesheet button



- In the timesheet form of the right panel, select the week in the Select Week dropdown to adjust the timesheet you want. The form reloads all values of the timesheet

- Edit the values you want, select the next approver
- Click on the Submit button

# Delegate task

Follow the steps below

- In the Approval form, click on the Delegate button
- In the delegate popup, select the person whom the task delegates to
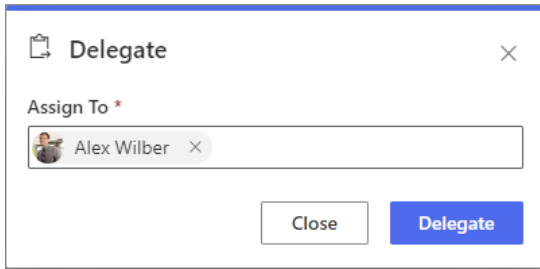
- Click on the Delegate button

## Delete the timesheet

If the timesheet has been rejected & you want to delete this request. Follow the steps below

- In the My Task tab, open the timesheet
- In the form appearing, click on the Delete button



- In the Delete popup appearing, click on the Delete button. Wait some seconds to complete



## Employee Views & Reports

### My Timesheets



Follow the steps below

- Open the app > My Timesheet tab
- The grid displays
    - o Processing timesheets: click on the Process List button

o Completed timesheet: click on the Final List button

⟳ Process List  ⊘ Final List

- Using the textbox search to find any timesheet

## My Dashboard

▤ My Timesheets   ☑ My Tasks   ▤ My Approval   📊 **My Daskboard**   ⚹ My Team   ▤ My Project

Aug  Sep  Oct  ▦ All  ▦ Last 3 Months ⌄

**Summary by Month**   ▥ ▦

Project Bilable
**516**

Project Non-Bilable
**0**

Overtime
**44**

Absences
**56**



Project Bilable  Project Non-Bilable  Overtime
Absences

**Projects**   ▥ ▦



| Project | Total |
|---|---|
| Software Timesh... | 280 |
| Software Servic... | 192 |
| Software Time's... | 88 |

**Summary by Week**   ▥ ▦



Project Bilable  Project Non-Bilable  Overtime  Absences

**Absences Summary (Fiscal Year: Jan 1 - Dec 31)**   ▦ Year: 2022 ⌄

| # | Leave Type | Taken | Balance | Remaining Days | Is Paid |
|---|---|---|---|---|---|
| 1 | Annual Leave | 40 | 160 | 120 | Yes |
| 2 | Sick Leave | 8 | 80 | 72 | Yes |
| 3 | Vacation Leave | 8 | 200 | 192 | Yes |
| 4 | Childcare Leave | 0 | 200 | 200 | Yes |
| 5 | Marriage Leave | 0 | 24 | 24 | Yes |
| 6 | Personal Leave | 0 | 80 | 80 | Yes |
| 7 | Public Holiday | 0 | 96 | 96 | Yes |
| 8 | Unpaid Holiday | 0 | 200 | 200 | No |

Follow the steps below

- Open the app > My Dashboard tab
- There are 4 sections
  o Summary by Month: Display the hours spends by month
  o Summary by Week: Display the hours spends by week
  o Summary by Project: Display the hours spends by the project
  o Absences Summary: Display the absences balance
- Using the chart & component icons to switch the view

**Summary by Month**   ▥ ▦

- Using the month dropdown or month buttons to change the filter by time ranges

Aug  Sep  Oct  ▦ All  ▦ Last 3 Months ⌄

- In the Absences Summary, use the Year dropdown to change the year filters

▦ Year: 2022 ⌄

## Timesheet Details Report

The report shows the timesheet details by the current user

| Year | Month | Week Number |
|---|---|---|
| 2022 | All | All |

Report · Download as XLS

| # | Year | Week Number | From Date | To Date | Note | | | | | | Total Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 2022 | 30 | 07/25/2022 | 07/31/2022 | | | | | | | 40 |

| Project/Leave | Task | Mon 25 | Tue 26 | Wed 27 | Thu 28 | Fri 29 | Sat 30 | Sun 31 | Is Billable/Paid | Note | Is Overtime | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Software Timesheet | | 8 | 8 | 8 | 8 | 8 | 0 | 0 | Yes | | No | 40 |
| Sum | | 8 | 8 | 8 | 8 | 8 | 0 | 0 | | | | 40 |

| # | Year | Week Number | From Date | To Date | Note | | | | | | Total Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | 2022 | 31 | 08/01/2022 | 08/07/2022 | | | | | | | 40 |

| Project/Leave | Task | Mon 1 | Tue 2 | Wed 3 | Thu 4 | Fri 5 | Sat 6 | Sun 7 | Is Billable/Paid | Note | Is Overtime | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Software Service Desk | | 8 | 8 | 8 | 8 | 8 | 0 | 0 | Yes | | No | 40 |
| Sum | | 8 | 8 | 8 | 8 | 8 | 0 | 0 | | | | 40 |

Follow the steps below

- Open the app, click on the All Features button at the right top
- In the All Features page, click on the Timesheet Details Report section
- Select the filter: Year, Month, or Week number
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file

## Weekly Report

The report shows the hours spend by day by the current user

| Year | Month | Week Number | Project/Leave |
|---|---|---|---|
| 2022 | All | All | All |

Report · Download as XLS

| # | Day | Date | Project Bilable | Project Non-Bilable | Overtime | Absences Paid | Absences Non-Paid | Total |
|---|---|---|---|---|---|---|---|---|
| 1 | Mon | 07/25/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 2 | Tue | 07/26/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 3 | Wed | 07/27/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 4 | Thu | 07/28/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 5 | Fri | 07/29/2022 | 8 | 0 | 0 | 0 | 0 | 8 |

Follow the steps below

- Open the app, click on the All Features button at the right top
- In the All Features page, click on the Weekly Report section
- Select the filter: Year, Month, Week number, or Project/Leave
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file

## Time Details Report

The report shows exactly the hours spend on projects or absences by the current user

| Year | Month | Week Number | Project/Leave |
|---|---|---|---|
| 2022 | All | All | All |

📊 Report                                                                                   Download as XLS

| # | Date | Project | Leave Type | Hours | Is Billable/Paid | Is Overtime |
|---|---|---|---|---|---|---|
| 1 | 07/25/2022 | Software Timesheet | | 8 | Yes | No |
| 2 | 07/26/2022 | Software Timesheet | | 8 | Yes | No |
| 3 | 07/27/2022 | Software Timesheet | | 8 | Yes | No |
| 4 | 07/28/2022 | Software Timesheet | | 8 | Yes | No |
| 5 | 07/29/2022 | Software Timesheet | | 8 | Yes | No |
| 6 | 08/01/2022 | Software Service Desk | | 8 | Yes | No |

Follow the steps below

- Open the app, click on the All Features button at the right top
- In the All Features page, click on the Time Details Report section
- Select the filter: Year, Month, Week number, or Project/Leave
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file

## Absences Report

The report shows the day's leave taken

| Year | Month | Leave Type |
|---|---|---|
| 2022 | All | All |

📊 Report                                                                                   Download as XLS

| # | Date | Leave Type | Hours | Is Paid |
|---|---|---|---|---|
| 1 | 08/09/2022 | Sick Leave | 8 | Yes |
| 2 | 08/26/2022 | Annual Leave | 8 | Yes |
| 3 | 09/16/2022 | Vacation Leave | 8 | Yes |
| 4 | 10/07/2022 | Annual Leave | 8 | Yes |
| 5 | 10/20/2022 | Annual Leave | 8 | Yes |
| 6 | 10/21/2022 | Annual Leave | 8 | Yes |
| 7 | 10/28/2022 | Annual Leave | 8 | Yes |
| Sum | | | 56 | |

Follow the steps below

- Open the app, click on the All Features button at the right top
- In the All Features page, click on the Absence Report section
- Select the filter: Year, Month, or Leave Type
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file

# Manager, Human Resource Views & Reports

## My Tasks

The view shows the pending timesheet that needs to you approve

| | My Timesheets | ☑ My Tasks | 🗐 My Approval | 📊 My Daskboard | 🗘 My Team | 🖼 My Project |
|---|---|---|---|---|---|---|

| 🔍 Search |
|---|

| Detail | Employee | Department | Week Number | From Date | To Date | Step | Status | Total Hours | Request Mode |
|---|---|---|---|---|---|---|---|---|---|
| 📄 | Adele Vance | IT | 47 | 11/21/2022 | 11/27/2022 | Line Manager | Pending Ap... | 40 | New |

Follow the steps below

- Open the app > My Timesheet tab
- Using the textbox search to find any timesheet
- Click on the approval icon of the timesheet to open the Approval Form

## My Approvals

The view shows timesheets that you approved

| | My Timesheets | ☑ My Tasks | 🗐 My Approval | 📊 My Daskboard | 🗘 My Team | 🖼 My Project |
|---|---|---|---|---|---|---|

| 🔍 Search |
|---|

| Detail | Employee | Department | Week Number | From Date | To Date | Step | Status | Total Hours | Request Mode |
|---|---|---|---|---|---|---|---|---|---|
| 📄 | Adele Vance | IT | 47 | 11/21/2022 | 11/27/2022 | Line Manager | Pending Ap... | 40 | New |

Follow the steps below

- Open the app > My Approval tab
- Using the textbox search to find any timesheet
- Click on the view icon of the timesheet to open the View form

## My Teams

The view shows the status of members of the team

- The hours spend
- The status of the timesheet

Aug   Sep   Oct   All   Last 3 Months

**Summary by Month**

Project Bilable
**516**

Project Non-Bilable
**0**

Overtime
**44**

Absences
**56**

Adele Vance                                                              Alex Wilber

■ Project Bilable   ■ Project Non-Bilable   ■ Overtime   ■ Absences
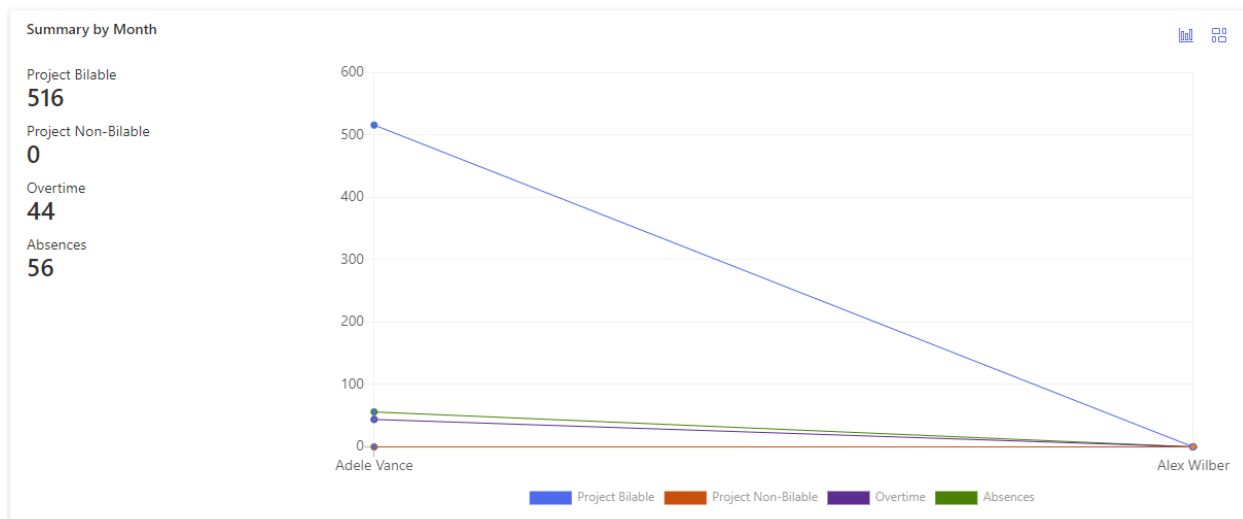
**Timesheet Status**                                    🔔 Reminder All   ▦ Week: 43 ⌄

| # | Detail | Employee | Week Number | Status | |
|---|--------|----------|-------------|--------|---|
| 1 | ⬈ | Adele Vance | 43 | Finished | |
| 2 | | Alex Wilber | 43 | Not submitted yet | 🔔 Reminder |

Follow the steps below

- Open the app > My Team tab
- Using the chart & component icons to switch the view
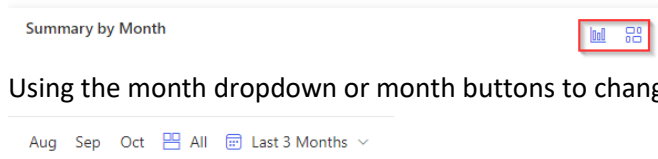
  Summary by Month                         [📊 🔲]

- Using the month dropdown or month buttons to change the filter by time ranges

  Aug   Sep   Oct   ▦ All   ▦ Last 3 Months ⌄
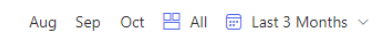
## Reminder submits the timesheet

The feature allows the manager can send an email reminder to members who miss submitting the timesheet

**Reminder** ✕

To

👤 Alex Wilber ✕

CC

[ ]

Subject

Reminder - Need to submit timesheet

Body

You don't have submitted the timesheet yet. Please submit your timesheet now

✕ Close     ▷ Send

Follow the steps below

- Open the app > My Team tab
- In the Timesheet Status section, click on the Reminder icon of the member you want to remind to submit the timesheet
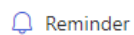
  🔔 Reminder

- In the Reminder panel,
  - Add employees more to the "To" or "CC" you want
  - Add the message to the Subject & Body
- Click on the Send button

## Search

The view allows search timesheets by year, month, week, department, employee, and status

| Year | | Month | | Week Number | | Status | |
|---|---|---|---|---|---|---|---|
| 2022 | ∨ | All | ∨ | All | ∨ | All | ∨ |
| **Department** | | | | **Employee** | | | |
| IT | | | ∨ | All | | | ∨ |

🔍 Search                                    ⟲ Process List   ⊘ Final List

🔍 Search

| Detail | | Employee | Department | Year | Week Number | From Date | To Date | Step | Status | Total Hours |
|---|---|---|---|---|---|---|---|---|---|---|
| ⬀ | ⋮ | Adele Vance | IT | 2022 | 47 | 11/21/2022 | 11/27/2022 | Line Manager | Pending Ap... | 40 |
| ⬀ | ⋮ | Adele Vance | IT | 2022 | 46 | 11/14/2022 | 11/20/2022 | Requester | Rejected | 40 |
| ⬀ | ⋮ | Adele Vance | IT | 2022 | 45 | 11/07/2022 | 11/13/2022 | Human resource | Pending Ap... | 1 |
| ⬀ | ⋮ | Adele Vance | IT | 2022 | 44 | 10/31/2022 | 11/06/2022 | Finished | Finished | 56 |
| ⬀ | ⋮ | Support | IT | 2022 | 44 | 10/31/2022 | 11/06/2022 | Line Manager | Pending Ap... | 2 |

Follow the steps below

- Open the app, and click on the All Features button. Then click on the Search section
- The grid displays
  - Processing timesheets: click on the Process List button
  - Completed timesheet: click on the Final List button

  

- After selecting the fields filter, click on the Search button

## Timesheet Details Report

The report shows the timesheet details by the department, employee, …



Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Timesheet Details Report
- Select the filter: Year, Month, Week number, department, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Monthly Report

The report shows the details of hours spent by month

| Year | Month | Project/Leave |
|---|---|---|
| 2022 | All | All |

| Department | Employee |
|---|---|
| All | All |

📊 Report      ⬤ Details      Download as XLS

Year: 2022

| Project Bilable | Project Non-Bilable | Overtime | Absences | Weekend |
|---|---|---|---|---|
| | | | | N/A |

| # | Month | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | Project Bilable | Project Non-Bilable | Overtime | Absences | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Adele Vance - IT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Jan | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Feb | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | | | 0 | 0 | 0 | 0 | 0 |
| | Mar | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Apr | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | 0 |
| | May | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Jun | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | 0 |
| | Jul | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | | 40 | 0 | 0 | 0 | 40 |
| | Aug | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 12 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 12 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 4 | 8 4 | 176 | 0 | 8 | 16 | 200 |
| | Sep | 8 | 8 | 0 | 0 | 8 4 | 8 4 | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 8 | 0 | 0 | 8 4 | 8 4 | 8 4 | 8 4 | 8 4 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | | 176 | 0 | 28 | 8 | 212 |
| | Oct | 0 | 0 | 12 | 12 | 12 | 12 | 8 | 0 | 0 | 8 4 | 8 4 | 8 | 8 | 8 | 0 | 0 | 12 | 12 | 12 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 164 | 0 | 8 | 32 | 204 |
| | Nov | 8 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 48 | 0 | 0 | 0 | 48 |
| | Dec | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | Sum | 604 | 0 | 44 | 56 | 704 |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Monthly Report
- Select the filter: Year, Month, Project/Leave, department, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Switch the toggle to change the view
  - ⬤ Details
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Weekly Report

The report shows the hours spend by the department, employee, …

| Year | Month | Week Number | Project/Leave |
|---|---|---|---|
| 2022 | All | All | All |

| Department | Employee |
|---|---|
| All | All |

📊 Report                                                                 Download as XLS

| # | Employee | Department | Day | Date | Project Bilable | Project Non-Bilable | Overtime | Absences Paid | Absences Non-Paid | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Adele Vance | | | | | | | | | |
| 1.1 | Adele Vance | IT | Mon | 07/25/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.2 | Adele Vance | IT | Tue | 07/26/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.3 | Adele Vance | IT | Wed | 07/27/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.4 | Adele Vance | IT | Thu | 07/28/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.5 | Adele Vance | IT | Fri | 07/29/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.6 | Adele Vance | IT | Mon | 08/01/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.7 | Adele Vance | IT | Tue | 08/02/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.8 | Adele Vance | IT | Wed | 08/03/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.9 | Adele Vance | IT | Thu | 08/04/2022 | 8 | 0 | 0 | 0 | 0 | 8 |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Weekly Report
- Select the filter: Year, Month, Week Number, Project/Leave, department, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Time Details Report

The report shows exactly the hours spend on projects or absences by the department, employee, …

| Year | Month | Week Number | Project/Leave |
|---|---|---|---|
| 2022 | All | All | All |

| Department | Employee |
|---|---|
| All | All |

📊 Report                                                                 Download as XLS

| # | Employee | Department | Date | Project | Leave Type | Hours | Is Billable/Paid | Is Overtime |
|---|---|---|---|---|---|---|---|---|
| 1 | Adele Vance | | | | | | | |
| 1.1 | Adele Vance | IT | 07/25/2022 | Software Timesheet | | 8 | Yes | No |
| 1.2 | Adele Vance | IT | 07/26/2022 | Software Timesheet | | 8 | Yes | No |
| 1.3 | Adele Vance | IT | 07/27/2022 | Software Timesheet | | 8 | Yes | No |
| 1.4 | Adele Vance | IT | 07/28/2022 | Software Timesheet | | 8 | Yes | No |
| 1.5 | Adele Vance | IT | 07/29/2022 | Software Timesheet | | 8 | Yes | No |
| 1.6 | Adele Vance | IT | 08/01/2022 | Software Service Desk | | 8 | Yes | No |
| 1.7 | Adele Vance | IT | 08/02/2022 | Software Service Desk | | 8 | Yes | No |
| 1.8 | Adele Vance | IT | 08/03/2022 | Software Service Desk | | 8 | Yes | No |
| 1.9 | Adele Vance | IT | 08/04/2022 | Software Service Desk | | 8 | Yes | No |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Time Details Report
- Select the filter: Year, Month, Week Number, Project/Leave, department, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Absences Report

The report shows the day's leave taken by the department, employee, …

The Manager/Human Resources Reports > Absences Report

| Year | Month | Leave Type |
|---|---|---|
| 2022 | All | All |

| Department | Employee |
|---|---|
| All | All |

📊 Report                                                                    Download as XLS

| # | Employee | Department | Date | Leave Type | Hours | Is Paid |
|---|---|---|---|---|---|---|
| 1 | Adele Vance | | | | | |
| 1.1 | Adele Vance | IT | 08/09/2022 | Sick Leave | 8 | Yes |
| 1.2 | Adele Vance | IT | 08/26/2022 | Annual Leave | 8 | Yes |
| 1.3 | Adele Vance | IT | 09/16/2022 | Vacation Leave | 8 | Yes |
| 1.4 | Adele Vance | IT | 10/07/2022 | Annual Leave | 8 | Yes |
| 1.5 | Adele Vance | IT | 10/20/2022 | Annual Leave | 8 | Yes |
| 1.6 | Adele Vance | IT | 10/21/2022 | Annual Leave | 8 | Yes |
| 1.7 | Adele Vance | IT | 10/28/2022 | Annual Leave | 8 | Yes |
| Sum | | | | | 56 | |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Absences Report
- Select the filter: Year, Month, Week Number, Project/Leave, department, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

# Project manager Views & Reports

## My Project

The view shows the hours spend on projects

- The hours spend on projects
- The hours spent by members
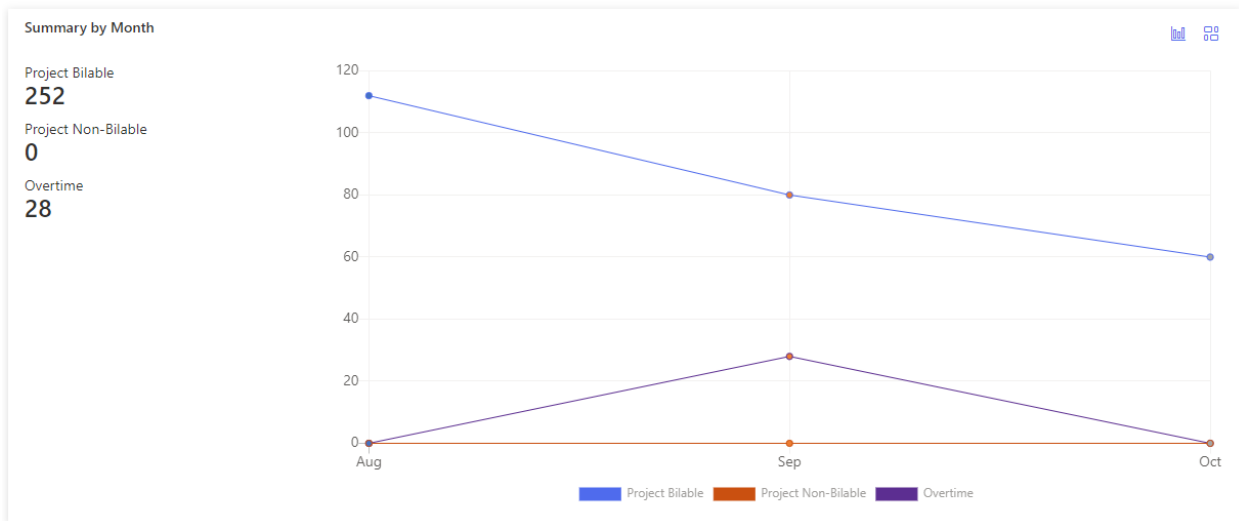
Follow the steps below

- Open the app > My Project tab
- Using the projects dropdown to change the project filters



- Using the chart & component icons to switch the view



- Using the month dropdown or month buttons to change the filter by time ranges



## Project Monthly Report

The report shows the details of hours spent by month

**Year**
2022

**Month**
All

**Project**
Software Timesheet

**Employee**
All

📊 Report | ⬤ Details | Download as XLS

Year: 2022 | Project Bilable | Project Non-Bilable | Overtime | Weekend / N/A

| # | Month | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | Project Bilable | Project Non-Bilable | Overtime | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Adele Vance - IT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Jan | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Feb | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | | | 0 | 0 | 0 | 0 |
| | Mar | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Apr | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 | 0 | 0 | 0 |
| | May | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Jun | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 | 0 | 0 | 0 |
| | Jul | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 0 | 40 | 0 | 0 | 40 |
| | Aug | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 112 | 0 | 0 | 112 |
| | Sep | 0 | 0 | 0 | 0 | 84 | 84 | 8 | 8 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 84 | 84 | 84 | 84 | 84 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 | 80 | 0 | 28 | 108 |
| | Oct | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 12 | 12 | 0 | 0 | 8 | 8 | 8 | 0 | 0 | 0 | 0 | 60 | 0 | 0 | 60 |
| | Nov | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | 0 |
| | Dec | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | 0 |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | Sum | 292 | 0 | 28 | 320 |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Project Monthly Report
- Select the filter: Year, Month, Project, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Switch the toggle to change the view

    ⬤ Details

- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Project Weekly Report
The report shows the hours spend on the project, employee, …

| Year | Month | Week Number | Project/Leave |
|------|-------|-------------|---------------|
| 2022 | All | All | All |

| Department | Employee |
|------------|----------|
| All | All |

📊 Report                                                                    Download as XLS

| # | Employee | Department | Day | Date | Project Bilable | Project Non-Bilable | Overtime | Absences Paid | Absences Non-Paid | Total |
|---|----------|------------|-----|------|-----------------|---------------------|----------|---------------|-------------------|-------|
| 1 | Adele Vance | | | | | | | | | |
| 1.1 | Adele Vance | IT | Mon | 07/25/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.2 | Adele Vance | IT | Tue | 07/26/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.3 | Adele Vance | IT | Wed | 07/27/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.4 | Adele Vance | IT | Thu | 07/28/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.5 | Adele Vance | IT | Fri | 07/29/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.6 | Adele Vance | IT | Mon | 08/01/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.7 | Adele Vance | IT | Tue | 08/02/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.8 | Adele Vance | IT | Wed | 08/03/2022 | 8 | 0 | 0 | 0 | 0 | 8 |
| 1.9 | Adele Vance | IT | Thu | 08/04/2022 | 8 | 0 | 0 | 0 | 0 | 8 |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Manager/Human Resources Reports section > Project Weekly Report
- Select the filter: Year, Month, Week Number, Project/Leave, Project, or employee
- Click on the Report button to trigger to get the data. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file
- Click on the link in the breadcrumb to back the all reports page's manager

## Edit the project's information

Master Lists  >  Projects List

🔲 Manage Projects

| # | Title | Project Managers | Rate | Active |
|---|-------|------------------|------|--------|
| 1 | Software Timesheet | Johanna Lorenz | 1 | Yes |
| 2 | Software Service Desk | Johanna Lorenz | 1 | Yes |
| 3 | Software Time's off | Johanna Lorenz | 1 | Yes |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Master List section > Project List
- Click on the Manage Projects button to add/edit the project

  🔲 Manage Projects

- In the Projects panel,

| Code ⌄ | Title ⌄ | Project Managers ⌄ | Project Members ⌄ | sysRate ⌄ | sysActive ⌄ | + Add column ⌄ |
|---|---|---|---|---|---|---|
| PA-001 | Software Timesheet | Johanna Lorenz | | 1 | ✓ | |
| PA-002 | Software Service Desk | Johanna Lorenz | Adele Vance | 1 | ✓ | |
| PA-003 | Software Time's off | Johanna Lorenz | | 1 | ✓ | |

- o Click on the New button to add a new project
- o Click on the Edit in grid view button to add/edit the project
- o Add/Edit
  - Code is the project code
  - Title is the project name
  - Project Manager
  - Project member. If blank, all employees to see the project when submitting the timesheet
  - Rate
  - Active: True means the project shows in the app, False means don't show anymore

# Administrator Features

## Master Lists

## Employees List

Master Lists > Employees List

Manage Employees

| # | Employee | Department | Managers | Human Resources | Rate | Active |
|---|---|---|---|---|---|---|
| 1 | Adele Vance | IT | Diego Siciliani | Henrietta Mueller | | Yes |
| 2 | Alex Wilber | IT | Diego Siciliani | Henrietta Mueller | | Yes |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Master List section > Employees List
- Click on the Manage Employees button to add/edit the employee

  Manage Employees

- In the Projects panel,

**TSFEmployees** ☆

| sysEmployee ⌄ | sys Department ⌄ | Managers ⌄ | Human Resourc... ⌄ | sysRate ⌄ | sysActive ⌄ |
|---|---|---|---|---|---|
| Adele Vance | IT | Diego Siciliani | Henrietta Mueller | | ✓ |
| Alex Wilber | IT | Diego Siciliani | Henrietta Mueller | | ✓ |

- o Click on the New button to add a new employee
- o Click on the Edit in grid view button to add/edit the employee



- o Add/Edit
  - Employee
  - Department
  - Managers: The line manager
  - Human Resource
  - Rate
  - Active: True means the project shows in the app, False means don't show anymore

## Leave Balance Management

Master Lists > Leave Balance Management

+ New Employee 🖫 Update Configuration                                    🗓 Year 2022 ⌄

| # | Employee | Annual Leave | Sick Leave | Vacation Leave | Childcare Leave | Marriage Leave | Personal Leave | Public Holiday | Unpaid Holiday |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Adele Vance | 160 | 80 | 200 | 200 | 24 | 80 | 96 | 200 |
| 2 | Alex Wilber | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Master List section > Leave Balance Management List
- Click on the New Employee to add the employee.

+ New Employee 🖫 Update Configuration

- Add the days allocate into the textbox under the leave type
- Click on the Update Configuration button
- Use the Year Dropdown to change the year filters

🗓 Year 2022 ⌄

In the Projects panel

## Department List

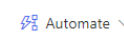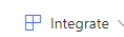Master Lists > Departments List

 Manage Departments
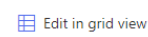
| # | Title | Managers | Human Resources | Active |
|---|-------|----------|-----------------|--------|
| 1 | IT | Diego Siciliani | Henrietta Mueller | Yes |
| 2 | Accounting | Diego Siciliani | Henrietta Mueller | Yes |
| 3 | Human Resource | Grady Archie | Isaiah Langer | Yes |

Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Master List section > Departments List
- Click on the Manage Departments button to add/edit the employee

   Manage Departments

- In the Department panel,

  + New    Edit in grid view    Share    Export ∨    Automate ∨    Integrate ∨    ...

  TSFDepartments ☆

  | Title ∨ | Managers ∨ | Human Resourc... ∨ | sysActive ∨ | + Add column ∨ |
  |---------|-----------|--------------------|-------------|-----------------|
  | IT | Diego Siciliani | Henrietta Mueller | ✓ | |
  | Accounting | Diego Siciliani | Henrietta Mueller | ✓ | |
  | Human Resource | Grady Archie | Isaiah Langer | ✓ | |

  - Click on the New button to add a new department
  - Click on the Edit in grid view button to add/edit the department

    + New    Edit in grid view

  - Add/Edit
    - Title: Name of the department
    - Managers: The lead of the department
    - Human Resource
    - Active: True means the project shows in the app, False means don't show anymore

## Leave Type List



Follow the steps below

- Open the app, click on the All Features button
- In the All Features, click on the Master List section > Leave Types List
- Click on the Manage Leave Types button to add/edit the Leave Type



- In the Leave Types panel,



- o Click on the New button to add a new Leave Type
- o Click on the Edit in grid view button to add/edit the Leave Type



- o Add/Edit
  - Title: Name of the Leave Type
  - Is Paid
  - Active: True means the project shows in the app, False means don't show anymore

## Delegate the task of the pending timesheet

The feature only shows if the timesheet is pending

Follow the steps below

- Open the app, click on the All Features button > Search

- In the search, find the timesheet you want to delegate the task
- Click on the... icon, then click the Delegate button
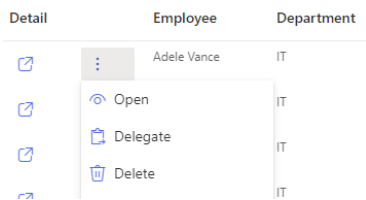


- Select the task of the person
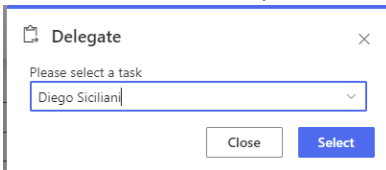


- Select the person who delegates to
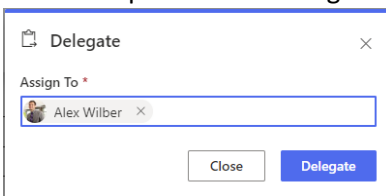


- Click the Delegate button

## Delete the pending timesheet

The feature only shows if the timesheet is pending

Follow the steps below

- Open the app, click on the All Features button > Search
- In the search, find the timesheet you want to delete
- Click on the... icon, then click the Delete button
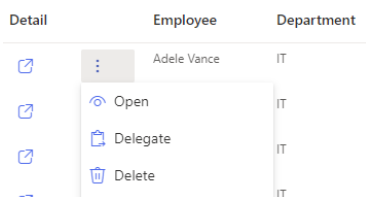


- In the Delete popup, click on the Delete button
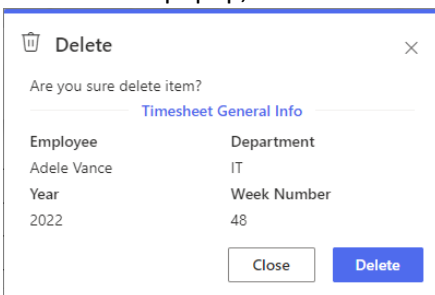
# System Admin

## Delete the timesheet

The feature is only available for the System Admin role. Please note that if you delete a completed timesheet, I need to delete the timesheet to both Process List & Final List

Follow the steps below

- Open the app, click on the All Features button > Search
- In the search, find the timesheet you want to delete
- Click on the… icon, then click the Delete(Sys Admin only) button



- In the Delete popup, click on the Delete button



## Sync the timesheet to the final list

The feature only shows if the timesheet is finished in the Process List

Follow the steps below

- Open the app, click on the All Features button > Search
- In the search, find the timesheet you want to sync
- Click on the… icon, then click the Sync Timesheet to the Final list button