Office 365 Timesheet Add-In (User manual)

By

ignatiuz
Compelling IT Solutions

For further information, visit us at www.ignatiuz.com
For support, contact us at support@ignatiuz.com

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1. Welcome to Office 365 Timesheet add-in

We are glad that you decided to try Office 365 Timesheet add-in by Ignatiuz. Ignatiuz is a leading IT solutions provider providing custom SharePoint development solutions.

This add-in is a package of everything that you would need to manage your employee timesheets. With a quick setup process and friendly user interface, the add-in offers an easy learning curve for the users.

The Office 365 Timesheet add-in is based on Office 365, a very user-friendly add-in for managing weekly timesheet and its approval. Office 365 Timesheet Add-in provides the user task automation, timesheet approval and user can also generate report of the employee.

Some of its top features are:
- Easy tracking of Timesheet
- Role based access
- Cloud Based
- Office 365 Web part
- Manager’s approval with comments

We hope that your employees will love using Office 365 Timesheet add-in, bringing in increased returns on your technology investments.

2. Latest upgrades and fixes

To offer maximum benefit out of the add-in, we keep adding new features often to it. We make sure that it adds more value to your business operations with every new release. Below is a quick overview of the recent releases.

Version: 1.0.0.2
Release date: 07/21/2017
Key features:
- Add administrator role to app. Now user have three roles (Admin, Manager, Employee)
- Administrator user created automatically when user adds add-in in SharePoint/office 365 site.
3. Installing and configuring the add-in

- Make sure that you are logged in to the Office 365 as an administrator. Click on this link to visit the add-in page on Office Store.
- On the add-in page, click on the “Add” button.

- You would be prompted to select the SharePoint site on which you want to install the add-in. Select the site on which you want to configure the add-in and click “Continue” button.
✓ Alternatively, you can log in to the SharePoint site on which you want to install the add-in, navigate to Site contents, click on New and click Add-ins in the dropdown.

✓ On the next screen, click on SharePoint store.

✓ On the SharePoint store page, search for **WA104381014**.
Open the add-in “Office 365 Timesheet” and click on “ADD IT” button.
✓ Once the add-in is installed, you can locate it under Site contents.
4. Workflow

Below is the workflow for Timesheet add-in:

- The Approver(s) Receives an Email Notification
- Approver(s) Approve/reject Spent Hours Of Timesheet
- The Approver(s) Rejects Request
- The Employee Receives an Email Notification
- The Employee Drafts Spent Hours In Timesheet
- Pending Approval
- Approved
- Rejected

5. Logging On

Once the user is logged in to the Office 365 environment and if add-in is already installed, it can be opened as shown below:

- Go on site content
- On click on site content it will show all the installed add-ins.
- Start the add-ins by clicking on it.
- Depending on the user logged in, the add-in will open Manager, Employee or Guest portal.
- Logging for the first time to the add-in will always open the Administrator portal.
5.1 System Menu

The system menu appears on the left and it is different for Manager and Employee. See below for the difference and uses:

1. Sub-Manager Portal
2. Manager Portal
3. Employee portal
4. Guest User portal

5.1.1 Sub-manager Portal

Sub-Manager portal can be used for visiting all the submitted Timesheet with their current status of the below working Manager and employee both. Below shows how to use the Sub-Manager Portal:
There are 4 major roles that are provided to this user, such as:-

- **My Timesheet** - Can check the status of his own timesheet.
  - Draft - Will show timesheet pending for submission or in creation process.
  - Pending Approval - Will show pending timesheet which are pending for approval.
  - Reject – Will show all the rejected timesheet.
  - Approved - Will show all the approved timesheet.

- **Timesheet** - To check the timesheet status of lower manager and employee.
  - Pending Approval - Will show timesheet pending which are pending for approval.
  - Reject – Will show all the rejected timesheet.
  - Approved - Will show all the approved timesheet.

- **Management** - Can see his own Time sheet and create new time sheets.
  - Manager portal
  - Employee portal
  - New Timesheet

- **Administration** – Can add new user, project, tasks and view reports.
5.1.2 Manager Portal
Manager portal can be used for visiting all the submitted Timesheet with their current status of the below working employee. Below shows how to use the Manager Portal:

- Timesheet
- Pending Approval
- Rejected
- Approved
- Management
- Manager Portal
- Administration
- Users
- Projects
- Project Tasks
- Reports
- Help

There are 3 major roles that are provided to this user, such as:-
- Timesheet – To check the time sheet status of employee.
  - Pending Approval – Will show pending timesheet which are pending for approval.
  - Reject – Will show all the rejected timesheet.
  - Approved – Will show all the approved timesheet.
- Management – Can see his own Time sheet.
  - Manager portal.
- Administration – Can add new user, project, tasks and view reports.
  - User – Can create new user.
  - User Roles – Can assign roles to created user.
Projects – Can create new project.
Project Tasks – Can add new task in project.
Reports – Can view reports on worked task.
Help – Will show the Guide of the site.

5.1.4 Employee Portal
Employee portal can be used for add the employee working details and can also check all the submitted Timesheet with their current status of its own. Below shows how to use the employee Portal:

- There are 3 major roles that are provided to this user, such as:-
  - Timesheet - To check the time sheet status of employee.
    - Pending Approval - Will show timesheet which are pending for approval.
    - Reject – Will show all the rejected timesheet.
    - Approved – Will show all the approved timesheet.
  - Management – Can see his own Time sheet and create new time sheets.
    - Employee portal
    - New Timesheet
Office 365 Timesheet Add-in

- Administration – Can add new tasks and view reports.
  - Project Tasks – Can add new task in project.
  - Reports – Can view reports on worked task.
  - Help – Will show the user guide of the site.

5.1.4 Guest Portal

Guest portal can be used only for viewing the user guide. Below shows how to use the guest portal:
6. Using the System

6.1 Adding New User

Administrator, Manager and Sub-manager can add new user.

✓ Here under Administration and on dashboard “Users” option is present.
✓ Clicking on “Users” create new user form gets opened.
Administrator/Manager/ Sub-manager can create new user by :-

- Entering employee “Name” in Employee field.
- Employee email ID will be auto fetched as the Name is entered.
- Entering manager “name” in the manager field.
- Manager email id will be auto fetched as the desired manager Name is entered.
- Click on “Save” button to create new Employee user.
- The record will be shown on the same page in a tabular format under employee form.

6.2 Adding New Project

✓ New Project can be added by Administrator/manager and Sub-manager.
✓ To add New Project click on “Projects” options present under administration section or on Dashboard.
Entering project name in “Project Name” field.
Select if check box if you want the project to be active state or inactive state
Click on “Save” button.
New project will get created and will be shown in the tabular on the same page under project creation form.

User can click on edit button to edit the project name and active status.

User can also click on delete button to delete the created project.

6.3 Adding New Task

New task can be added by Administrator/manager/Sub-manager and employee.

To add new task click on “Tasks” options present under administration section or on Dashboard.

A Task can be added to any project from selecting the project from the Project dropdown.

To create new task enter Task name in “Task Name” field.

Select the project.

Select the checkbox if the creating task is active or inactive.

Click on save button.
6.4 Adding New Time sheet

- New timesheet can be added by Sub-manager and employee.
- To add new Timesheet click on “New Timesheet” options present under Management section or on Dashboard.

- On click in the Week ending date text box calendar gets opened
- Select week ending date from the calendar
- Select the Project from the project dropdown
Select the Task from the task dropdown
✓ Add the number of hours spent on this task for each day in the week selected.
✓ Add descriptions/comments if needed in description box.
✓ Click on “Add rows” button to add new rows for multiple task worked for the week to be submitted.
✓ The Billable and Non-billable section shows total hours added for each day.
✓ Save draft will allow to save the data added and timesheet can be edited later.
✓ Submit the timesheet for approval to the manager of the current employee.

6.5 Approval and Rejection of Timesheet
Only Manager (Approve/Reject) the employees Timesheet. Below shows how Manager can approve the Timesheet.

✓ Visiting pending approval will list all the Timesheet waiting for approval and clicking any timesheet will open this form.
✓ Manager can enter their comments in the “Manager Comments” box.
✓ Click on Approve/Reject button for approval or rejection.
✓ After approval or rejection a mail to an employee will be send that the timesheet is approved or rejected.

7. Reports

Reports are generated as per logged in user. If a Manager is logged in, report will show approved timesheets for all the employees under the logged in manager. If an employee is logged in report will be shown only of employees approved timesheet.

Below shows the available filters and report generation:
- Reports can be viewed by all the users
- Click on Reports present under “Administration”
- Select options from available filters
- Click on search
- Approved reports will be shown.