Office 365 Timesheet Add-In (User manual)

By

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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 runs with Office 365 and SharePoint on-premise. It is a user friendly add-in allowing employees to submit their weekly timesheets and managers to approve the submitted timesheets. Convenient reporting feature allows managers and administrators to generate reports of work done throughout the week.

Few of the salient features of the Office 365 Timesheet add-in are:

- Quick and easy tracking of work hours
- Role based access
- Cloud based solution
- Manager's approval with comments
- Detailed reporting
- Completely secure with all your data lying in your own environment

We hope that your employees will love using Office 365 Timesheet add-in, resulting 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:** V 2.4.0.0  
**Release date:** 08/31/2018  
**Key features:**
- ✓ Added Project import feature for Pro version
- ✓ Bug fixing
- ✓ Report can be fetched by each day single date.

3. **Installing and configuring the add-in**

- ✓ Make sure that you are logged in to the Office 365 as an administrator. Click on [here](#) to visit the Office 365 Timesheet 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 also install this add-in from the SharePoint site. You need to 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. User permissions to access the add-in

All the user accessing Office 365 Timesheet should have “Edit” and “Contribute” permissions. For giving permissions to users and group please follow below steps:-

✓ Click on gear icon and select “Site Settings”.
✓ In Site settings, select “Site permissions”.
✓ Click on “Check Permissions”.

✓ Enter Username / Group in the text box.
✓ Click on “Check Now”.

![Image of Office 365 and SharePoint permissions settings]
✓ It will show the current permissions granted to the user or group.
✓ The user or group should always have either “edit” or “Contribute” permission.

As shown in the above screenshot “Administrator” have contribute permission in “Timesheet Users” group, so it can access the Timesheet app smoothly.

5. Workflow

✓ Below is the workflow for Timesheet add-in:
6. 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 clicking on site content, it will show all the installed add-ins.
✓ Start the add-in by clicking on it.
✓ Depending on the logged-in user, the add-in will open Manager, Employee or Guest portal.
✓ Logging in for the first time to the add-in will always open the Administrator portal.

6.1 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. Administrator
2. Manager Portal
3. Manager’s -Manager Portal
4. Employee portal
5. Guest User portal

6.1.1 Administrator

Administrator portal can be used for coordinating all the features that a timesheet Manager, employee needs to work up on. Administrator has the main right to create user role in the system that will help the organization to run smoothly.

Mentioned below shows how to use the Administrator Portal:

Office 365 Timesheet

✓ There are 5 major features that are provided to this user, such as:-

- Administration – Can add new user role, user, project, tasks and view reports.
  - User Roles – Can assign roles to created user.
    (Note:- Administrator role should not be deleted as, if once deleted then application is left without any administrator role and cannot create new user roles. Because of this, the functionality of the app gets disturbed.)
  - User – Can create new user.
  - Project – Can create new project.
  - Project Task – Can add new task in project.
- Settings – Can edit weekending date, choose color theme, language, select another approver, edit mails.
- Reports – Can view reports on worked task which are approved of all employees.
- Help – Will show the Guide of the site.

6.1.2 Manager’s -Manager Portal

Manager’s -Manager portal can be used for viewing all the submitted Timesheet by the subordinates with their current status. Mentioned below shows how to use the Manager’s -Manager Portal:

✓ There are 4 major features that are provided to this user, such as:-
  o 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.
o Timesheet - To check the timesheet status of lower manager and 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.

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

o Administration – Can add new user, project, tasks and view reports.
  ● User– Can create new user.
  ● Project – Can create new project.
  ● Project Task – Can add new task in project.
  ● Reports – Can view reports on worked task which are approved.
  ● Help– Will show the Guide of the site.

6.1.3 Manager Portal

Manager portal can be used for view all the submitted Timesheet with their current status. Mentioned below shows how to use the Manager Portal:

![Manager Portal Image]

✓ There are 3 major features that are provided to this user, such as:
  o Timesheet– To check the timesheet 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.
  - 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.

6.1.4 Employee Portal

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

✓ There are 3 major features that are provided to this user, such as:-
  - Timesheet—To check the timesheet 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
○ 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.

6.1.5 Guest Portal

Guest portal can be used only for viewing the user guide. Below shows how to use the guest portal:
8. How to use the add-in

7.1 Add New User Roles
Administrator can add new user role.

✓ At dashboard under Administration “User Roles” option is present.
✓ Clicking on “User Roles” create new user role form gets open.

✓ Enter user name in User field.
✓ Select the Role and click on “save”.
✓ The associated email id of the user will be auto fetched in the “User Email” tabel when saved.

7.2 Add New User

Administrator, Manager and Manager’s -Manager can add new user.

✓ At dashboard under Administration “Users” option is present.
✓ Clicking on “Users” create new user form gets open.
Administrator/Manager/ Manager’s -Manager can create new user by :-
  o Enter employee name in Employee field.
  o The associated email id of the employee will be auto fetched in the “Employee Email” text box.
  o Enter manager “Name” in the manager field.
  o The associated email id of the manager will be auto fetched in the “Manager Email” text box.
  o Click on “Save” button to create new Employee user.

The added record will appear on the same page in a tabular format under employee form.
7.3 Add New Project

- Only Administrator/manager and Manager’s -Manager can add\create a new project.
- To add “New Project” click on “Projects” option present under “Administration” section or via “Dashboard”.

- Enter project name in “Project Name” field.
- Keep the checkbox checked if you want the project to be in active state or you may uncheck the checkbox to make the project inactive.
- 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.
✓ Once the Project is added and if get associated with any project task or get used in new timesheet then its cannot be deleted.

7.4 Add\ Create New Task

✓ New task can be added by Administrator/manager/Manager’s -Manager and employee.
✓ To add new task, click on “Tasks” options present under “Administration” section or navigate via “Dashboard”.

Office 365 Timesheet
A Task can be added to any project by selecting the project from the Project dropdown.

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

Select the project from the dropdown.

Keep the checkbox checked if you want the “Task” to be in active state or you may uncheck the checkbox to make the “Task” inactive.

Click on save button.
✓ New task will get created and will be appear in the table on the same page under task creation form.
✓ To edit the project task, click on the edit icon present in the edit column, to edit the “Task name” and the status.
✓ To delete the project task, click on associated delete icon present in the delete column.
✓ Once the Project Task is added and if get used in new timesheet then its cannot be deleted.

7.5 Create New Timesheet

✓ Only Manager’s -Manager and employee can create their timesheet.
✓ To add new “Timesheet” click on “New Timesheet” options present under “Management” section or navigate via Dashboard.

✓ 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 of the week.
✓ Add descriptions / comments if needed in description box.
✓ Click on “Add rows” button to add new rows for if required.
✓ The Billable and Nonbillable section accordingly shows total hours added for each day.
✓ Save draft will allow to save the data added and timesheet can be edited later.
✓ Click on “Submit” if you want to submit the timesheet.
✓ If the timesheet is saved in draft mode, the user can delete that timesheet if needed and can create a new Timesheet with same dates.
✓ Drafted timesheet can also be exported to various format such as Excel, .csv, PDF, MS word.

7.6 Approval and Rejection of Timesheet

Only Manager and Manager’s -Manager can (Approve /Reject) the employee’s Timesheet. Below are the steps mentioned narrates how Manager can approve the Timesheet.

✓ Click on “Pending Approval “will list all the “Timesheets” waiting for approval and clicking any timesheet will open the relevant timesheet.
✓ Manager can enter their comments in the “Manager Comments” box.
✓ Click on Approve / Reject button for approval or rejection.
✓ Once the timesheet is approved, Manager can again reject the approved timesheet mentioning their comments.
✓ After approval or rejection, a mail to the employee associated to the opened timesheet will be send, that the timesheet is approved or rejected.
✓ Draft/Rejected/Pending for approval timesheet can be deleted from account.
✓ All the approved and rejected timesheet can now be exported in various formats such as Excel, .csv, PDF, MS word.
8. Reports

Reports are generated as per logged in user. If a Manager is logged in, report section will show approved timesheets for all the employees associated with the logged in manager. If an employee is logged in, in the report section only his/her timesheet which are approved will appear.

Below shows the available filters and report generation:

✓ Click on Reports present under “Administration”.
✓ Select options from available filters.
✓ Click on search.
✓ Reports can also be searched on single date selection other than week ending dates.
✓ Reports will appear in the grid according to the set filter.
✓ Reports can now be exported in various format such as Excel, .csv, PDF, MS word.
9. Paid Feature

As the add-in is upgraded with new features some paid features are added in to admin section. Few navigation links are added other than the above mentioned once. Now the admin has the authority to convert the free version to new paid version to use the new features. Such as -

✔ Licence - To get the paid version, you have to upgrade the free version to paid version. And to get the paid version you have to follow few steps.

- Click on license link.
- Click on the button “I have an activation key”.

You are using free version of Office 365 Timesheet App
Upgrade today to enjoy the power packed features of Office 365 Timesheet Pro

Why Upgrade?
Office 365 Timesheet Pro offers power packed features to make it more productive for your business. Here are few of the major features that you get after upgrading:

- I have an activation key
- Buy Office 365 Timesheet Pro
Enter the license key, to activate the feature.

Click on activate button.

The license will get activated.

Note: You will receive the key through email once the payment is done.
Once the license gets activated user will be able to see two new links as “Settings” and “Custom Reports”. The two new features for the paid version.

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

- **Set week ending date** - Week ending date have two options for date selection.
  - **Select week day** - With selection of week ending day we can now change the day for submission of timesheet from Friday as default to any other day according to the organization.
  - **Select date type** - Here two option are given for date type, by selecting any of the type you want, you can change the type of the date in entire application.

- **Choose color theme** -
  - This feature will help the users to select various colors for the same application. User can click on the Choose color theme tab and can select any color that one wants to keep for the entire organization.
  - User can also select desired font for the site organization.
  - This feature will only be available to in administrator account.
**Custom report** - On Custom report new search features are been added that will be helpful for the user to generate customised reports easily.

- All the features of custom report can be visible only in Pro version of the app.
- Users can generate detailed reports according to the selected options needed.
- Once the add-in gets converted in Pro version each user can access custom report page in there existing accounts such as :- Employees, Manager, Manager of manager, Admin and the old reports link will get replaced with the new one.
✓ **Project Import:**
A new feature on Project page is been added for Paid version only. This feature will help all the users to import project from excel sheet in bulk amount in one click.

Once the license is activated, users can go on Projects page and can see the new import feature.
Here you have to upload an excel file of (.xlsx) format where Project should be the heading and below heading you can list all the projects you want to be get tracked in Timesheet.

Once the excel gets created click on Choose file button and select the file.
Now click on save, all the entered projects will get imported in the Timesheet system smoothly.
This feature will be viewed and accessed by all the authorities who can access project page like Admin, Manager and Manager’s Manager.

10. **How to delete the add-in from the site?**
   To remove the app from the site please follow the below steps:-
   ✓ Login to SharePoint using Administrator account
✓ Click on setting icon

✓ Go to contents

✓ Click on Classic SharePoint link to switch the site in classic mode. (For SharePoint Online users)
✓ Locate office 365 timesheet app

✓ Click the three dots on office 365 app - a popup will appear
✓ A remove option will appear click on remove and the app will get removed successfully.
10. How to update the add-in?