

User Guide –M365 Timesheet



By
ignatiuz

www.ignatiuz.com



info@ignatiuz.com



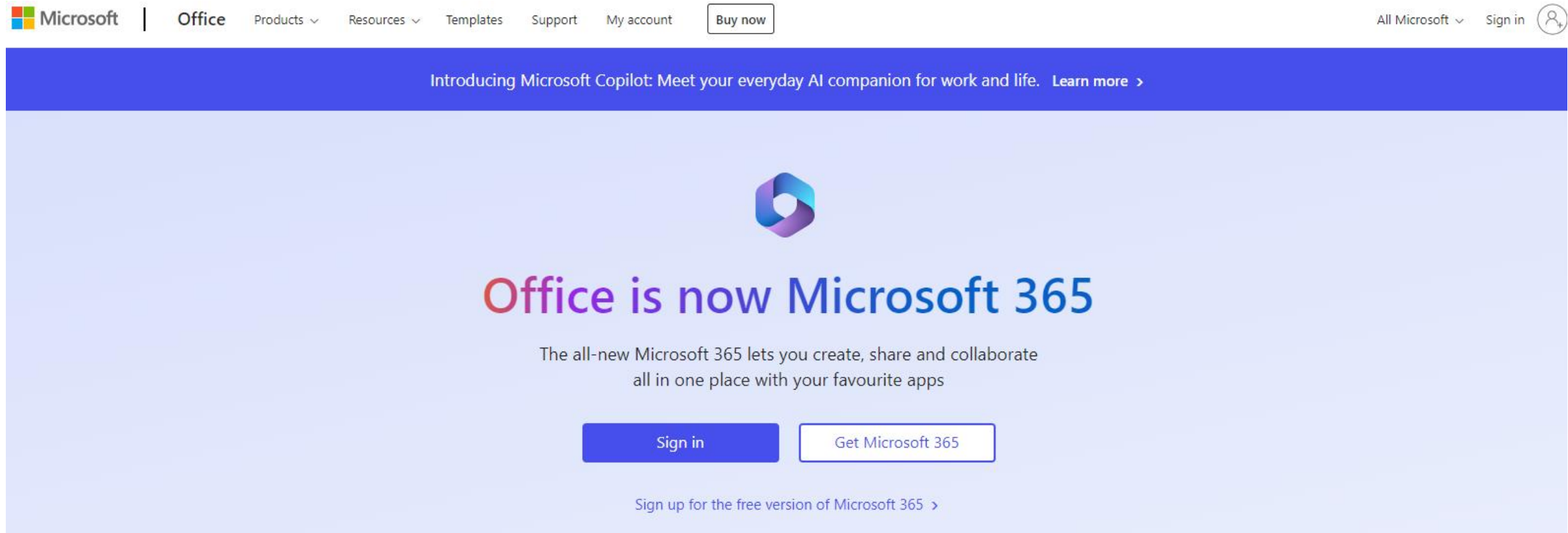
For further information, visit us at www.ignatiuz.com For support, contact us
at support@ignatiuz.com
Version: - 1.0.0.0

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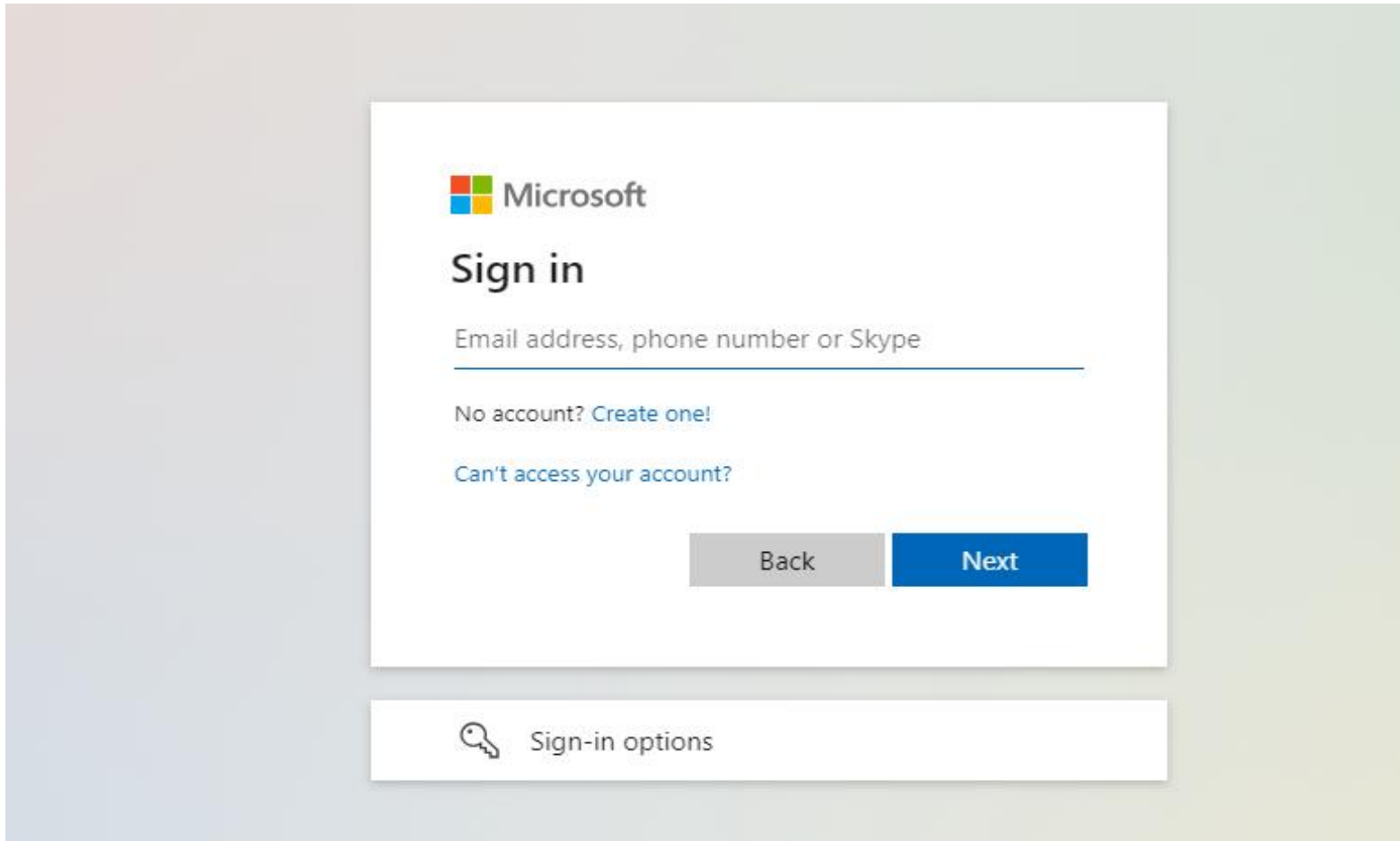
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1. Login to Microsoft 365 or SharePoint

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



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

The image shows a Microsoft sign-in page. At the top is the Microsoft logo. Below it is the heading "Sign in". There is a text input field with the placeholder text "Email address, phone number or Skype". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom of the main sign-in area are two buttons: a grey "Back" button and a blue "Next" button. Below the main sign-in area is a separate box containing a key icon and the text "Sign-in options".

Microsoft


Sign in

Email address, phone number or Skype

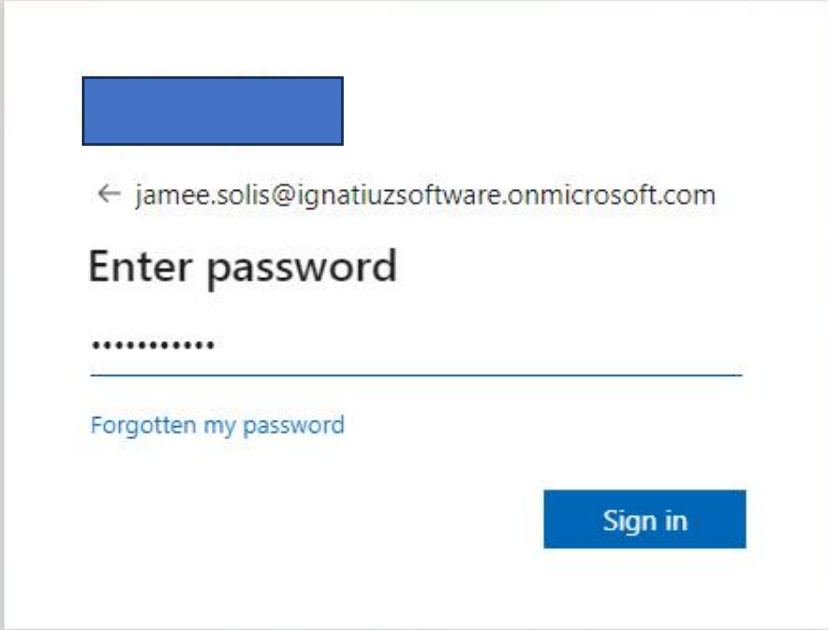
No account? [Create one!](#)

[Can't access your account?](#)

Back Next

 Sign-in options

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



A screenshot of a SharePoint login dialog box. At the top is a blue rectangular placeholder for a logo. Below it is a back arrow icon followed by the text "jamee.solis@ignatiuzsoftware.onmicrosoft.com". The main heading is "Enter password" in bold. Below the heading is a password input field represented by a series of dots. Underneath the password field is a blue link that says "Forgotten my password". At the bottom right of the dialog is a blue button with the text "Sign in".

Accessing Site Contents:

- Refer to **step 1** in the screenshot below, where the settings (gear icon) are located at the top right corner of the SharePoint page.
- Click on the settings icon to reveal the menu.
- From the menu, choose "Site contents." This will redirect you to the page displaying all installed app (applications).

The screenshot shows the SharePoint interface for the 'M365Timesheet' site. The top navigation bar includes the 'SharePoint' logo, a search bar, and icons for announcements, people, settings, and help. The site title 'M365Timesheet' is displayed, along with 'Private group' and '1 member'. Below the title, there are links for 'Site usage', 'Site workflows', 'Site settings', and 'Recycle bin (3)'. The main content area shows a list of site contents, including 'Setting', 'Task', 'Theme', 'Timesheet Users', 'UserLog', 'Apps for SharePoint', 'Events', 'M365 Timesheet', and 'Site Pages'. The 'M365 Timesheet' entry is highlighted, indicating it is the selected item.

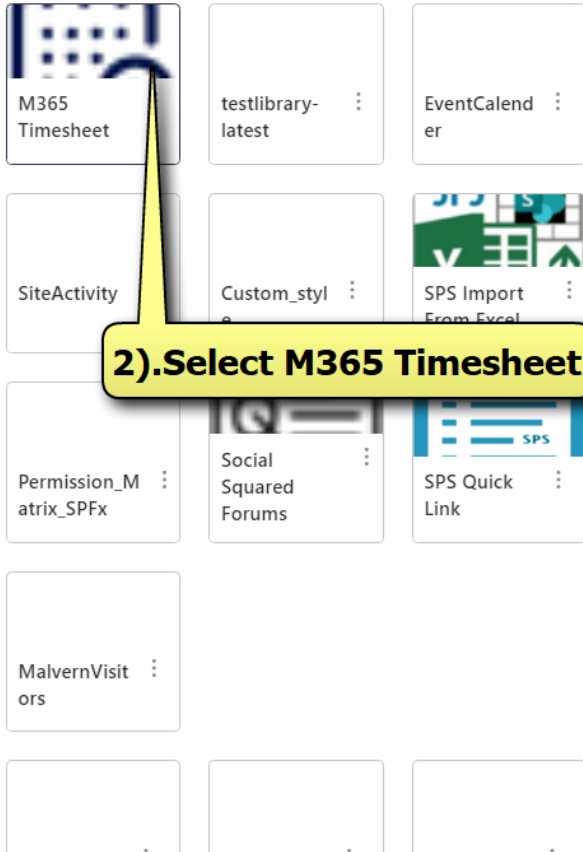
Icon	Name	Type	Count	Last Modified
+	New			
Setting icon	Setting	List	1	9/16/2024 4:38 AM
Task icon	Task	List	2	9/16/2024 5:09 AM
Theme icon	Theme	List	0	9/16/2024 4:34 AM
Timesheet Users icon	Timesheet Users	List	6	9/16/2024 8:03 AM
UserLog icon	UserLog	List	20	9/17/2024 1:16 AM
Apps for SharePoint icon	Apps for SharePoint	List	1	9/16/2024 4:30 AM
Events icon	Events	Events list	0	9/16/2024 2:22 AM
M365 Timesheet icon	M365 Timesheet	App		9/16/2024 4:33 AM
Site Pages icon	Site Pages	Page library	9	9/16/2024 4:53 AM

- After installing the app, add the app to the page.

The screenshot displays the SharePoint interface for the M365Timesheet app. The top navigation bar includes the SharePoint logo and a search bar. Below the app title, there are options for '+ New', 'Page details', and 'Analytics'. A dropdown menu is open under '+ New', listing various content types: List, Document library, Page, Space, News post, News link, Plan, and App. A yellow callout box with a pointer highlights the 'Page' option, containing the text **1). Click on page**. The main content area features two large image tiles. The left tile, titled 'Content scheduler list [Sample content]', shows a modern glass skyscraper. The right tile, titled 'About One Contoso event [Sample content]', shows two people shaking hands. Below these, a third tile titled 'Previous event [Sample content]' shows a woman presenting to a group of people in a meeting room.

Page templates

From Microsoft Saved on this site Apps



Learn more about app pages

M365 Timesheet

M365 Timesheet description

1).Go to the Apps

(Admin)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours. Record your time and monitor your project progress effortlessly.

Admin



Track Your Work Hours with Ease

Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.

[Click Here](#)

0

Total No. of Projects

0

Total No. of Tasks

0

Total No. of Active

0

Total No. of Timesheets

3). Click on the create page button

☐ Create as a private draft ⓘ

[Create page](#)


[Cancel](#)

MT

M365Timesheet

Private group1 member

Save

M365 Timesheet
SEAMLESS TIME MANAGEMENT

Dashboard

User Management

Project Management

Manage Permission

Document Management

Reports

Settings


App Information

Help And Support

Hello, Mason Wells (Admin)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Admin



Track Your Work Hours with Ease

Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.

Click Here

4

Total No. of Projects

2

Total No. of Tasks

1

Total No. of Active Employee

16

Total No. of Timesheets

+

Add Shortcut

2). Click on the save button

1). Enter the title

App page details

Title

M365Timesheet

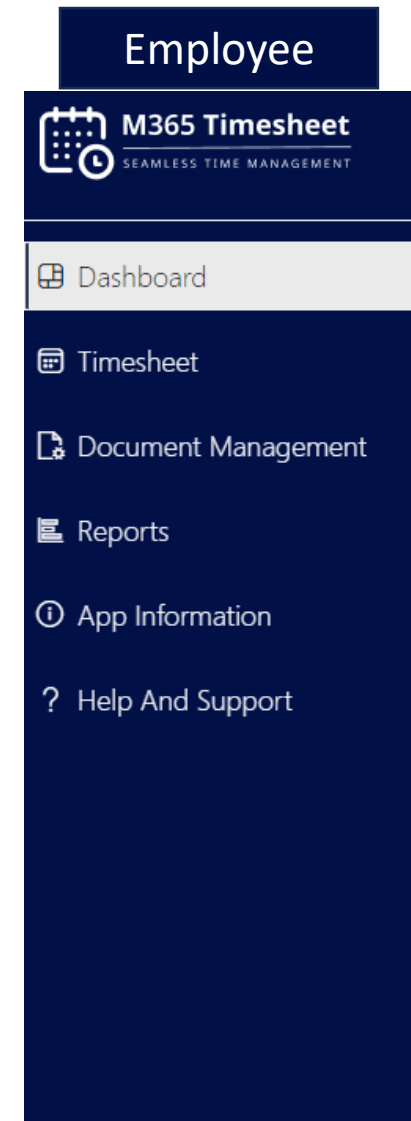
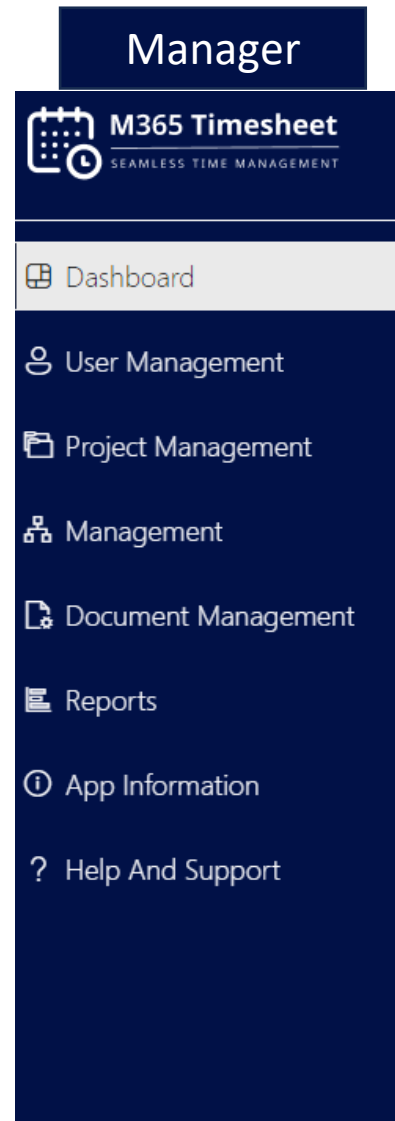
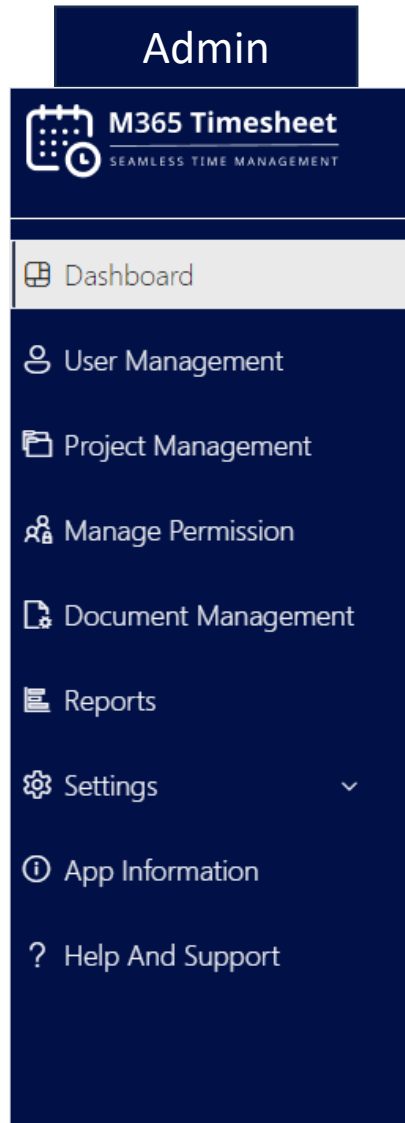
Description

Group Name

Description Field

M365 Timesheet

2. Role-Based Navigation Bar




3. Default – Admin

- **Default Timesheet Admin:** The application installer automatically becomes the Timesheet Admin, allowing them to manage everything, including creating admins, managers, employees, and projects.
- **User Identification and Role Display:** When you access the dashboard, your name and role will be clearly shown based on your login details for easy identification.

[illegible]

4. Handling Role Combinations

- Set up the system to manage different role combinations like Admin/Manager/Employee, Admin/Manager, Admin/Employee, and Manager/Employee.
- Ensure users with multiple roles can access the correct features and navigation tabs for their roles

 **M365 Timesheet**
SEAMLESS TIME MANAGEMENT

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Hello, Mason Wells


(Admin/Manager/Employee)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Admin

Manager


Employee




Track Your Work Hours with Ease

Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.


[Click Here](#)




Create Task




Create Project



Employee



FAQ



Add Shortcut

4

Total No. of Projects

2

Total No. of Tasks

2

Total No. of Active Employee


16

Total No. of Timesheets

13

5. Dashboard

5.1 Admin Dashboard

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Help And Support


Hello, Mason Wells (Admin)


Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.


Admin





Track Your Work Hours with Ease
Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.
[Click Here](#)


Create Task


Create Project


Employee


FAQ


Add Shortcut

8
Total No. of Projects

6
Total No. of Tasks

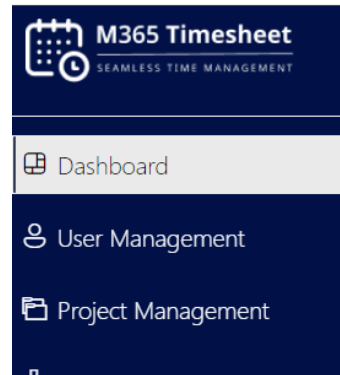
2
Total No. of Active Employee

4
Total No. of Timesheets

14

Default Administrator Role

- Initial installer becomes Timesheet Administrator, with full control over creating admins, managers, employees, and projects.
- Display current user's name and role prominently upon login for clear identification.
- Customize navigation tabs based on the user's role, showing the Admin tab for administrators.



Hello, Mason Wells (Admin)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Admin



Track Your Work Hours with Ease



Track Your Work Hours with Ease

Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.


[Click Here](#)

“Click Here” Button for External Link:

- Add a clear "Click Here" button that links to the Ignatiuz official site for more services

5.1.1.Cards

- **Cards View:**
- **Total Number of Projects:** The total count of projects created in the timesheet
- **Total Number of Tasks:** The total count of individual tasks or activities associated with projects in the timesheet
- **Total Number of Active Employees:** The total count of currently active employees.
- **Total Number of Timesheets:** Total number of timesheets, recording hours worked on tasks or projects..

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Hello, **Mason Wells** (Admin)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.


Admin





Track Your Work Hours with Ease


Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.


[Click Here](#)


Create Task


Create Project


Employee


FAQ


Add Shortcut

8
Total No. of Projects

6
Total No. of Tasks

2
Total No. of Active Employee

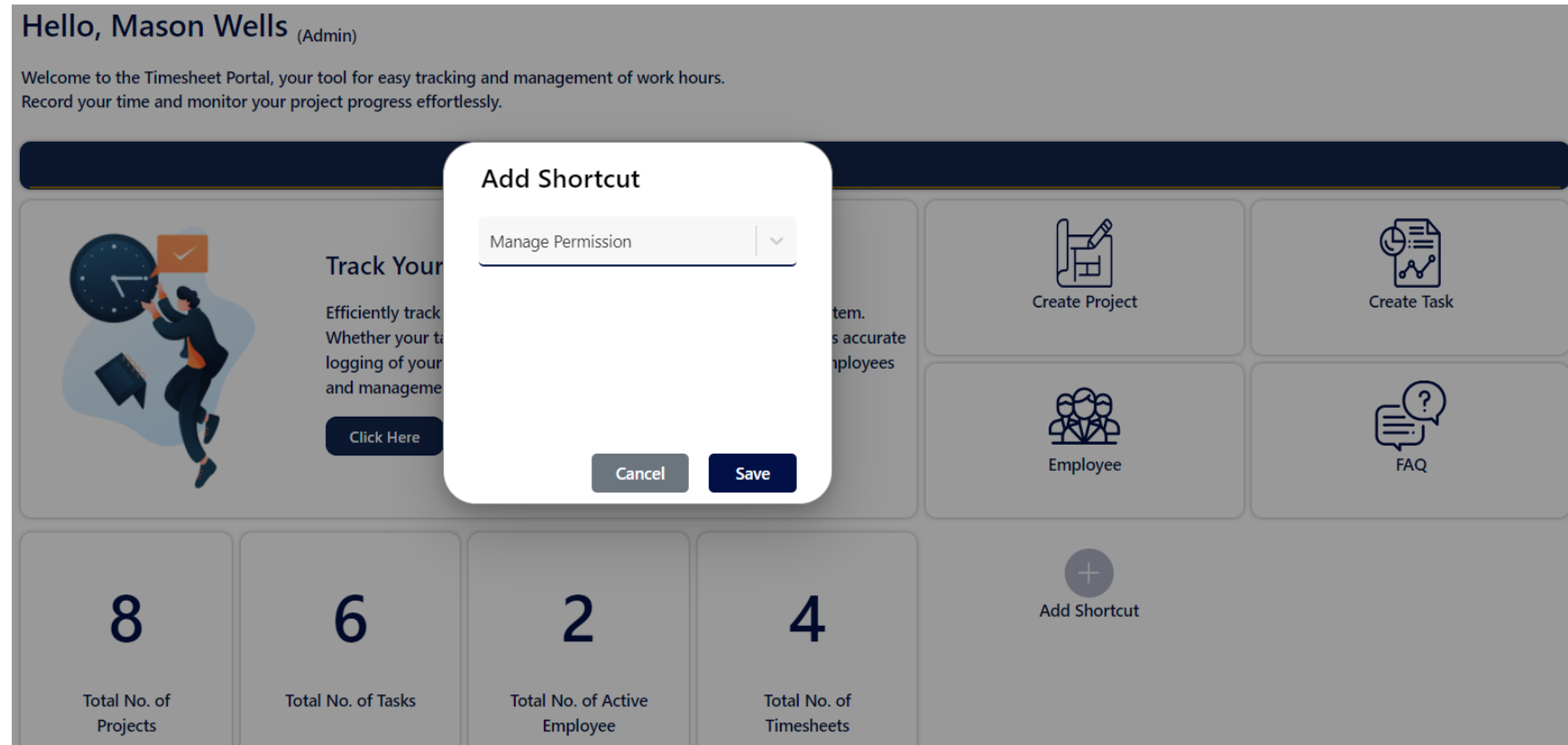
4
Total No. of Timesheets

5.1.2. Add Shortcut

➤ Introducing the Shortcut Feature / Quick Links:

To enhance dashboard customization for administrators, we have introduced the shortcut feature. Admins can now select frequently used quick links for easy access in their daily tasks. To utilize this feature, follow these simple steps:

- Click the "Add Shortcut" button.
- Choose the desired quick link from the drop-down list.
- Click "Save" to confirm your selection.



Hello, Mason Wells (Admin)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Add Shortcut

Manage Permission

Cancel

Save



Track Your

Efficiently track
Whether your t
logging of your
and manage

Click Here



Create Project



Create Task



Employee



FAQ

8

Total No. of
Projects

6

Total No. of Tasks

2

Total No. of Active
Employee

4

Total No. of
Timesheets



Add Shortcut

To Remove shortcut, click on cross



Create Task



Employee



Create Project



FAQ



App Information



Manage Permission




Add Shortcut

Added to the quick link are app
information and manage permission

5.2.Manager Dashboard

- Timesheet Status Bar Graph
- Hours Worked Bar Graph

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Jamee Solis

Log Out

Hello, Jamee Solis (Manager)

Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Manager



Track Your Work Hours with Ease

Efficiently track your work hours with our easy-to-use timesheet system. Whether your tasks are billable or non-billable, our platform ensures accurate logging of your daily activities, streamlining the process for both employees and management.

Click Here

Number of Timesheets

Pending Approval

2

Approved

1

Draft

1

Rejected

1

Status

Hours Worked

36

27

18

9

0

33

➤ **User Identification and Role Display:**

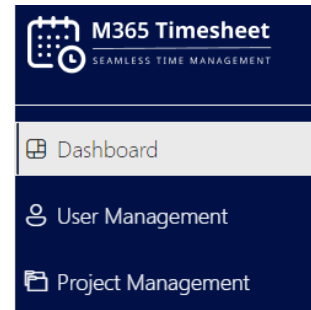
Retrieve and prominently display the current user's role (e.g., Manager) on the dashboard for easy identification.

➤ **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.

➤ **Hours Worked Bar Graph:**

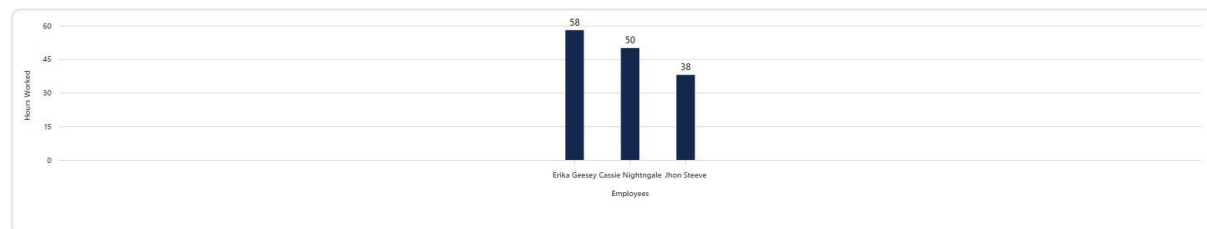
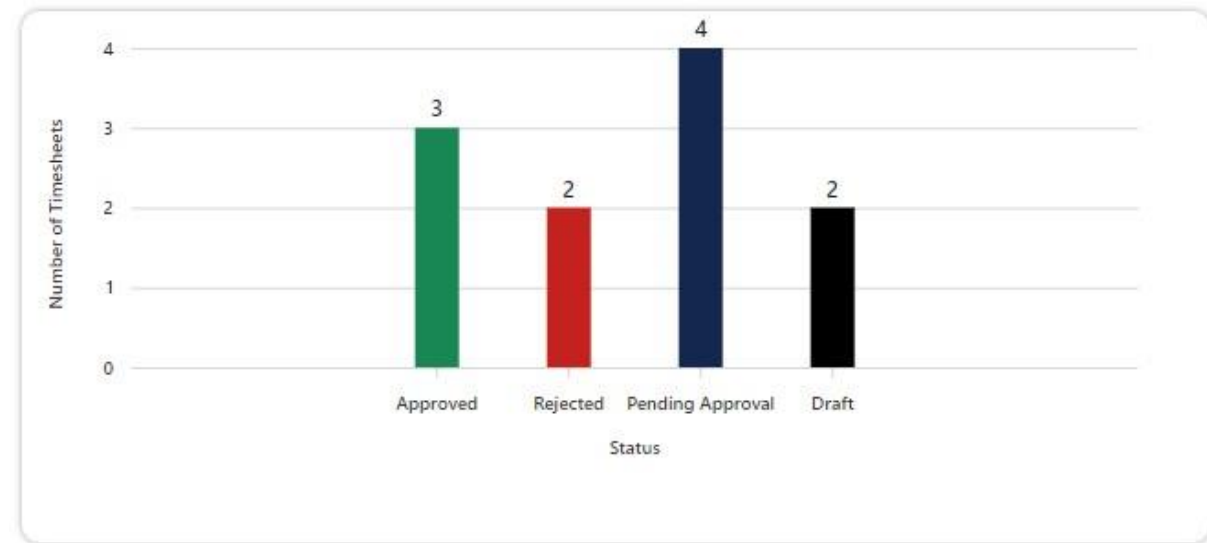
Show a bar graph in step 1 that displays each employee's hours worked in the previous week, providing a visual breakdown of time allocation.



Hello, Jamee Solis (Manager)

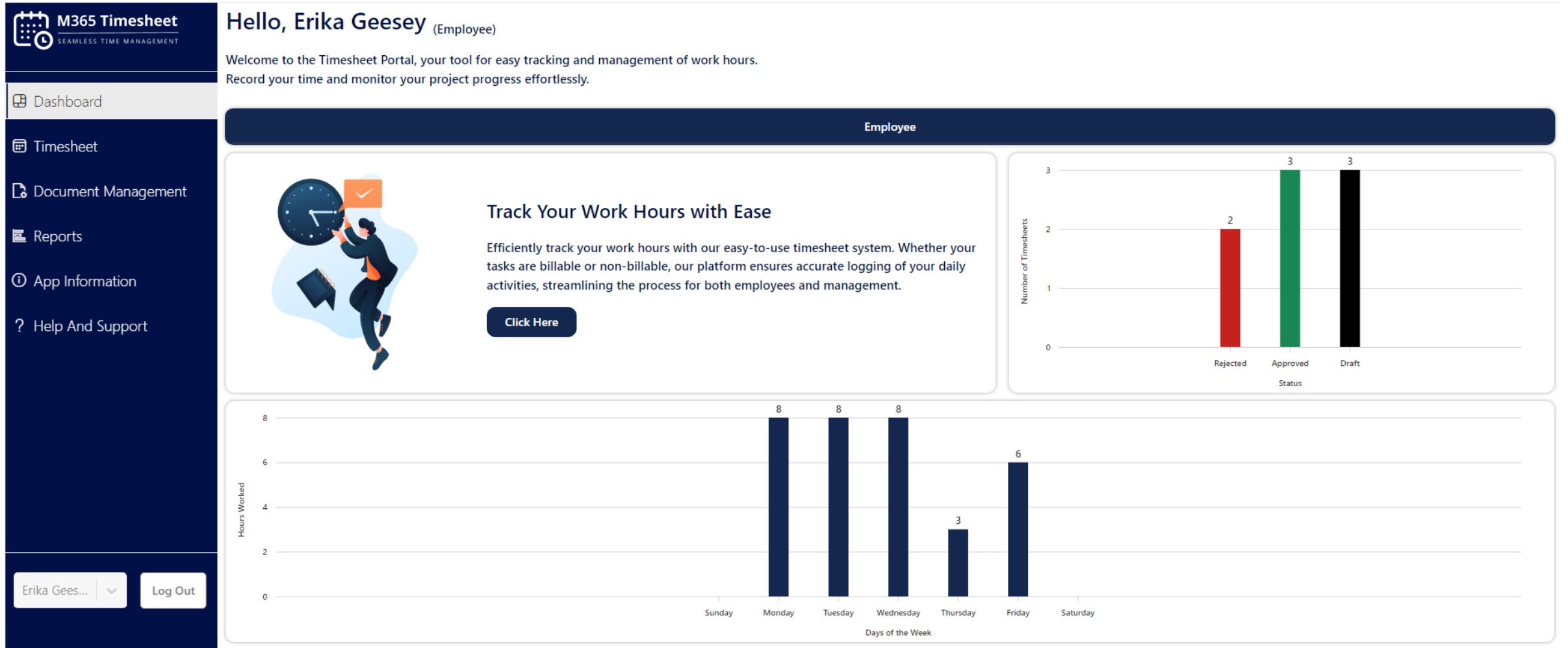
Welcome to the Timesheet Portal, your tool for easy tracking and management of work hours.
Record your time and monitor your project progress effortlessly.

Manager



5.3.Employee Dashboard

- Timesheet Status Bar Graph
- Hours Worked Bar Graph



➤ User Identification and Role Display:

Retrieve and prominently display the current user's role (e.g., Manager) on the dashboard for easy identification.

➤ 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.

➤ Hours Worked Bar Graph:

Display a bar graph showcasing the employee's hours worked, divided by each day of the week.




6. How to create a new user role

6.1 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."

6.1.1 Add Manually

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Select User

Login As

User Management

Admin/Manager

Employee

Assign Role

1

Choose Option ☒ Add Manually ☐ Bulk Import

User Role *

Select User Role

2

☐ Super Manager (A super manager cannot be an employee and can submit their timesheet)

☒ Active

User Name *

Select User Name

3

User Email *





4

Clear

Save

Export

Search

User Name	User Email	Role	Super Manager	Active	Edit	Delete
Mason Wells	Mason.Wells@ignatiuzsof...	Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Jamee Solis	jamee.solis@ignatiuzsoft...	Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

6.1.2 Bulk Import

➤ Import Role:

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

- Select the “Bulk Import” radio button.
- Download the correct format Excel file directly.
- Add users to the downloaded Excel file.
- Select the file by clicking on the “Choose file” button.
- Upload the file back to this page.
- Click on the import button.

M365 Timesheet
SEAMLESS TIME MANAGEMENT

User Management

Admin/Manager | Employee

Assign Role

Choose Option ☐ Add Manually ☒ Bulk Import

Import User Role *

Choose file No file chosen

[Download the template](#)

Clear Import

Export


User Name	User Email	Role	Super Manager	Active	Edit	Delete
Mason Wells	Mason.Wells@ignati...	Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Jamee Solis	jamee.solis@ignatiuz...	Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

6.2 Add New Employee :

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

1. Employee email: Automatically fetch the associated email ID of the employee based on the entered name.
2. Manager name: Provide a dropdown to select the manager's name from a list.
3. Manager email: Automatically fetch the associated email ID of the selected manager.
4. Active checkbox: Allow the user to mark if the new employee should be active in the timesheet application.
5. Include a "Save" button at the bottom of the form to create the new employee user.

6.2.1 Add Manually

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Select User

Login As

User Management

Admin/Manager

Employee

Assign Role

Choose Option ☒ Add Manually ☐ Bulk Import

Employee ID

Employee Name *

Manager Name *

Bill Rate

Department

Employee Email *

Manager Email *



☒ Active

Clear

Save

Export

Search

Employee ID	Employee Name	Employee Email	Manager Name	Manager Email	Department	Bill Rate	Active	Edit	Delete
4	Erika Geesey	erika.geesey@ignat...	Jamee Solis	jamee.solis@ignatiu...		45	<input checked="" type="checkbox"/>		

3

4

5

1

6

2

7

6.2.2 Bulk Import

➤ Import Role:

On the Employee tab, you can see the “Bulk Import” option with a radio button.

- Select the “Bulk Import” radio button.
- Download the correct format Excel file directly.
- Add employee to the downloaded Excel file.
- Select the file by clicking on the “Choose file” button.
- Upload the file back to this page.
- Click on the import button.

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Admin/ManagerEmployee

Assign Role

Choose Option ☐ Add Manually ☒ Bulk Import

Import User Role *

Choose file No file chosen

[Download the template](#)

ClearImport

Export

Search

Employee ID	Employee Name	Employee Email	Manager Name	Manager Email	Department	Bill Rate	Active	Edit	Delete
4	Erika Geesey	erika.geesey@ignati...	Jamee Solis	jamee.solis@ignatiu...		45	<input checked="" type="checkbox"/>		


Show entries 10Page 1 of 1PreviousNext

6.3 Super Manager

➤ Add New Super Manager Role

Administrators can add new user roles.

- Navigate to the User Management.
- Clicking on Admin/Manager opens a form to create a new user role.
- Select the Role.
- Note that the existing employee cannot be a super manager.
- Keep the checkbox checked to keep the super manager active or uncheck it to make the super manager inactive.
- Enter the username and click Save.
- The associated email ID of the user will be auto-fetched in the User Email table when saved.

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Employee

Assign Role

Choose Option ☒ Add Manually ☐ Bulk Import

1

User Role *

Select User Role

2

User Name *

Select User Name

4

User Email *

☐ Super Manager (A super manager cannot be an employee and can submit their timesheet)


3

☒ Active

Clear

Save

- The Super Manager role entails that their own timesheets do not go for approval; they are approved directly.
- The Timesheet is used for viewing all his submitted Timesheets with their status.

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SEAMLESS TIME MANAGEMENT

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Timesheet

New Timesheet

Approved

Export

Search

View	Week Ending Date	Billable	Non Billable	Super Manager	Status
View	09/06/2024	4	0	Mason Wells	Approved
View	09/13/2024	8	0	Mason Wells	Approved
View	09/20/2024	8	0	Mason Wells	Approved
View	08/30/2024	8	0	Mason Wells	Approved
View	08/23/2024	8	0	Mason Wells	Approved

Show entries

10

Page 1 of 1

Previous

Next

7. Add Project and Task

7.1. Add New Project

7.1.1 Add Manually

When users click on the "Projects" tab, display a form for creating a new project.

- Project Name: Allow users to enter the name of the project.
- Estimated Hours: Provide a field for users to input the estimated number of hours for the project.
- Active Checkbox: Include a checkbox to allow users to indicate if the project should be in an active state.
- Include a "Save" button at the bottom of the form to save the new project.

M365 Timesheet
SEAMLESS TIME MANAGEMENT

Project Management

Project | Task | Assign Project to Task

Choose Option ☒ Project ☐ Bulk Import

Project Name *

Estimated Hours

☒ Active

Clear Save

Export

Search

Project Name	Estimated Hours	Active	Edit	Delete
Seamless Integration	100	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Timesheet Migration	100	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

Show entries 10 Page 1 of 1 Previous Next

7.1.2 Bulk Import

➤ Import Project

On the Project tab, you can see the “Bulk Import” option with a radio button.

- Select the “Bulk Import” radio button.
- Download the correct format Excel file directly.
- Add projects to the downloaded Excel file.
- Select the file by clicking on the “Choose file” button.
- Upload the file back to this page.
- Click on the import button.

The screenshot displays the M365 Timesheet Project Management interface. The left sidebar contains navigation links: Dashboard, User Management, Project Management (selected), Manage Permission, Document Management, Reports, Settings, App Information, and Help And Support. The main content area is titled 'Project Management' and has three tabs: 'Project' (selected), 'Task', and 'Assign Project to Task'. Under the 'Project' tab, there are two radio buttons for 'Choose Option': 'Project' and 'Bulk Import' (selected, indicated by callout 1). Below this is the 'Import Project *' section, which includes a 'Choose file' button (indicated by callout 3) and a 'Download the template' link (indicated by callout 2). At the bottom right of this section are 'Clear' and 'Import' buttons (indicated by callout 4). Below the import section is a table with columns: Project Name, Estimated Hours, Active, Edit, and Delete. The table contains two rows: 'Seamless Integration' and 'Timesheet Migration', both with an estimated hours of 100 and an active status. At the bottom right of the table, there is a 'Show entries' dropdown set to 10, 'Page 1 of 1', and 'Previous' and 'Next' buttons.

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Help And Support

Project Management

Project Task Assign Project to Task

Choose Option ☐ Project ☒ Bulk Import

Import Project *

Choose file No file chosen

[Download the template](#)

Clear Import

Export

Project Name	Estimated Hours	Active	Edit	Delete
Seamless Integration	100	<input checked="" type="checkbox"/>	Edit	Delete
Timesheet Migration	100	<input checked="" type="checkbox"/>	Edit	Delete

Show entries 10 Page 1 of 1 Previous Next

7.2 Add Task

7.2.1 Add Manually

- From the left navigation menu, click on the "Project Management" section. Alternatively, you may navigate via the "Dashboard."
- Within the Project Management section, click on the "Task" tab to access the Task Management interface.
- Enter the task name in the "Task Name" field.
- Optionally, check the checkbox to set the task as active or uncheck it to make the task inactive.
- Click on the "Save" button to create a new task.

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Project Management

ProjectTaskAssign Project to Task

Choose Option

Task

Bulk Import

Task Name *

Active

3

ClearSave

Export

Search

Task Name	Active	Edit	Delete
Unit Testing	<div></div>	<div></div>	<div></div>
Production Setup	<div></div>	<div></div>	<div></div>

Show entries

10

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7.2.2 Bulk Import

➤ Import Task

On the Task tab, you can see the “Bulk Import” option with a radio button.

- Select the “Bulk Import” radio button.
- Download the correct format Excel file directly.
- Add a task to the downloaded Excel file.
- Select the file by clicking on the “Choose file” button.
- Upload the file back to this page.
- Click on the import button.

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Project Management

ProjectTaskAssign Project to Task

Choose Option

Task

Bulk Import

Import Task *

Choose file

No file chosen

[Download the template](#)

Clear

Import

Export

Search

Task Name	Active	Edit	Delete
Unit Testing	<input checked="" type="checkbox"/>		
Production Setup	<input checked="" type="checkbox"/>		

Show entries

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7.3 Assign Project to Task

- From the left navigation menu, click on "Project Management" under the "Administration" section.
- Within the Project Management section, locate and click on the "Assign Project to Task" tab.
 - In the Assign Project to Task form, select the desired project from the dropdown menu labeled "Project Name."
 - Then, select the task to which you want to assign the project from the dropdown menu labeled "Task Name."
 - After selecting the project and task, click on the "Save" button to save the assignment.

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Project Management

Project Task **Assign Project to Task**

Project Name * Task Name *

Select Project Name Select Task Name

Clear Save

Export

Project Name	Task Name	Delete
Seamless Integration	Unit Testing	
Seamless Integration	Production Setup	
Timesheet Migration	Unit Testing	
Timesheet Migration	Production Setup	

Search

Show entries 10 Page 1 of 1 Previous Next

➤ Excel Format

1. Excel format for Project

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

8. Manage Permission

8.1 Authorized Access

- Enter the username you want to give access to in the “Authorized User” textbox.
- Select the user you want to grant access to from the App user list.
- Click the Save button. The user will then have access to the selected user account.
- Added user permissions can also be made inactive. Once a user is made inactive, they will no longer be able to access the granted user account.

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Manage Permission

Timesheet - Authorized Access

Authorization Logs

Authorized User Name *

App User Name *

Select Authorized User







Select App User

☒ Active

Clear

Save

Search

Authorized User Name	Authorized User Email	App User Name	User Email	Active	Edit	Delete
Mason Wells	Mason.Wells@ignatiuzsoftwar...	Jamee Solis	jamee.solis@ignatiuzsoftware....	<input checked="" type="checkbox"/>		
Mason Wells	Mason.Wells@ignatiuzsoftwar...	Erika Geesey	erika.geesey@ignatiuzsoftwar...	<input checked="" type="checkbox"/>		
Mason Wells	Mason.Wells@ignatiuzsoftwar...	Mason Wells	mason.wells@ignatiuzsoftware...	<input checked="" type="checkbox"/>		

Show entries

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8.2 Authorized logs

This page provides information regarding the changes made by logged-in users who have been given the authority to log in as a different user and perform activities in their absence.

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Manage Permission

Timesheet - Authorized Access

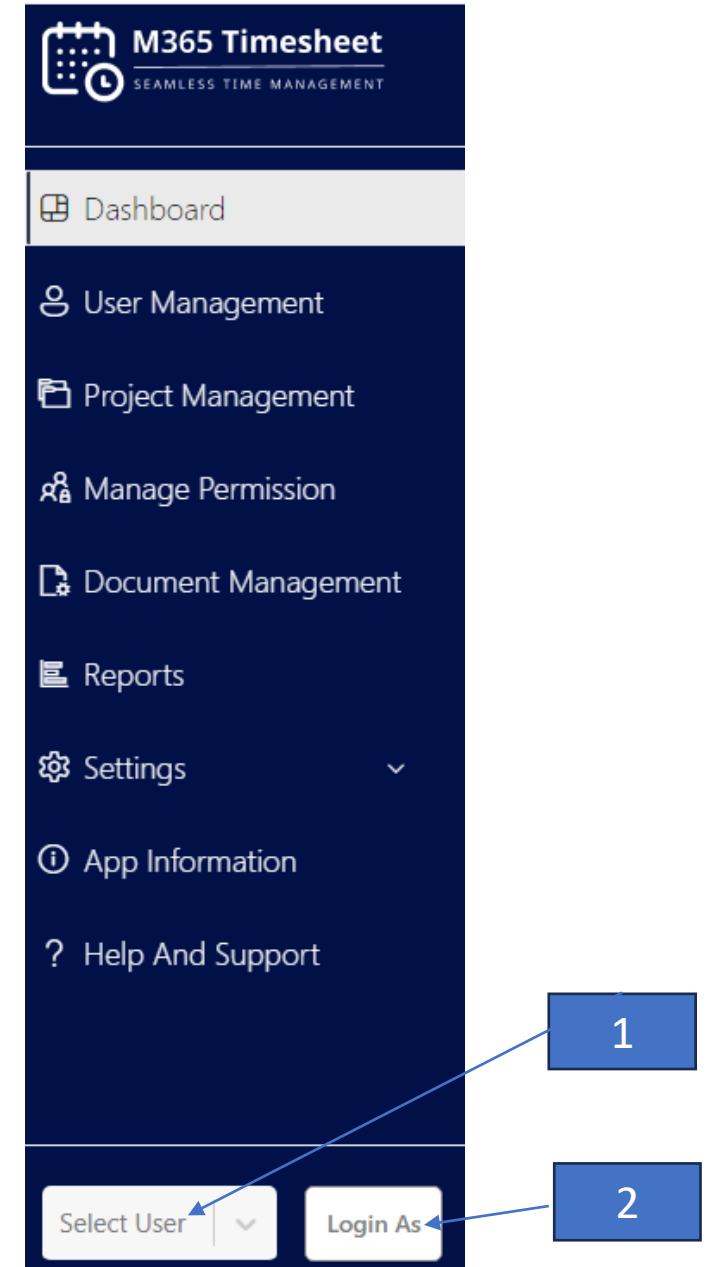
Authorization Logs

Q Search

Logged In User	Logged In As	Page Name	Activity Performed By User	Date
Mason Wells	Erika Geesey	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Erika Geesey	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Erika Geesey	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Erika Geesey	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Erika Geesey	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Mason Wells	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Mason Wells	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Mason Wells	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Mason Wells	Timesheet	Employee timesheet added successfully!	09/16/2024
Mason Wells	Mason Wells	Timesheet	Employee timesheet added successfully!	09/16/2024

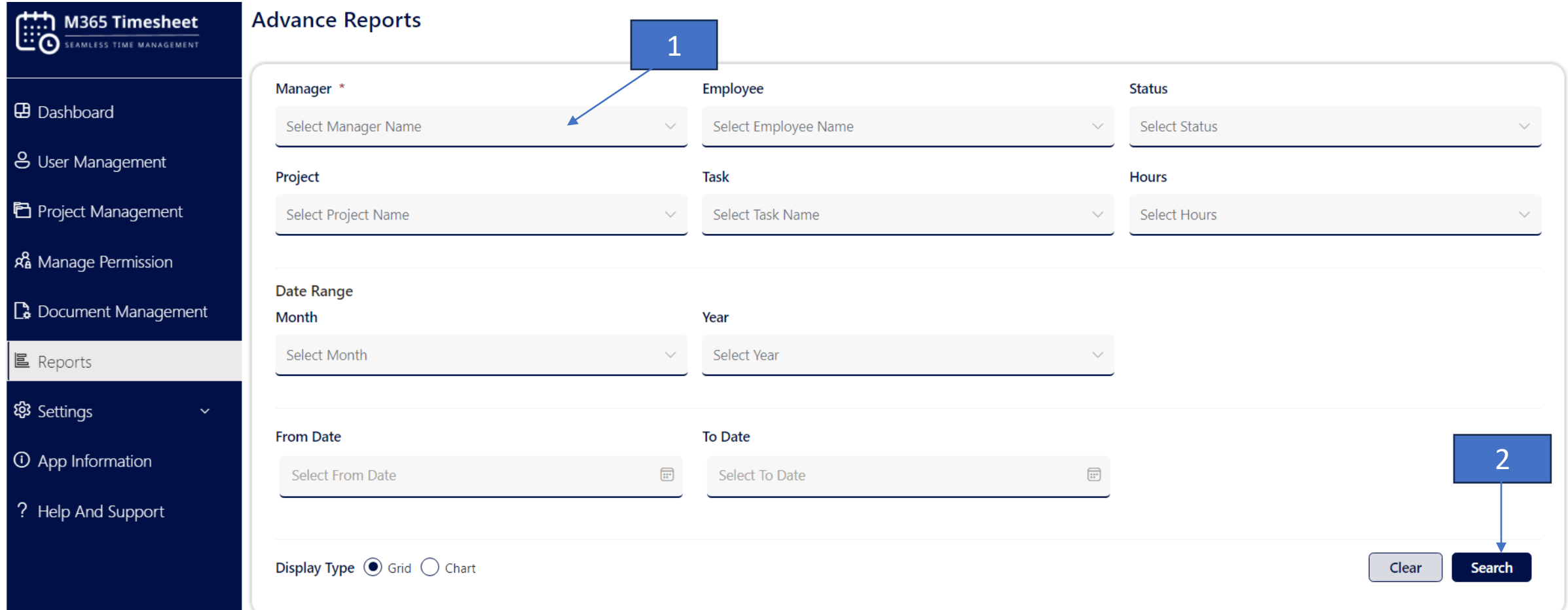
8.3. Select App User:

- After assigning the management permission, the user will display in the dropdown.
- Select App User from dropdown & Click on Login as



9. Reports

- Within the Reports section, provide available filters such as Manager Name, date range, employee name, project, or timesheet status.
- After selecting the desired filters, users can click on the "Search" button to generate the report.



M365 Timesheet
SEAMLESS TIME MANAGEMENT

Advance Reports

Manager *
Select Manager Name

Employee
Select Employee Name

Status
Select Status

Project
Select Project Name

Task
Select Task Name

Hours
Select Hours

Date Range

Month
Select Month

Year
Select Year


From Date
Select From Date

To Date
Select To Date

Display Type ☒ Grid ☐ Chart

Clear **Search**

- Reports will appear in a grid format according to the set filters.

M365 Timesheet

SEAMLESS TIME MANAGEMENT

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Select User

Login As

From Date

Select From Date

To Date

Select To Date

Display Type

☒ Grid

☐ Chart

Clear

Search

Export

Search

Week Ending Date	Employee ID	Employee	Manager	Project	Task	Task Description	Billable Hours	Non-Billable Hours	Total Hours	Status	Manager Comment
09/13/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Unit Testing		16	0	16	Pending Approval	
09/13/2024	14	Erika Geesey	Jamee Solis	Seamless Integration	Production Setup		15	0	15	Pending Approval	
09/13/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Production Setup		2	0	2	Pending Approval	
09/20/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Unit Testing		36	0	36	Approved	9/16/2024 15:43 PM (Approved) : Approved
09/20/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Production Setup		4	0	4	Approved	9/16/2024 15:43 PM (Approved) : Approved
09/06/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Production Setup		8	0	8	Pending Approval	
10/04/2024	14	Erika Geesey	Jamee Solis	Timesheet Migration	Production Setup		12	0	12	Rejected	9/16/2024 15:43 PM (Rejected) : Reject

Show entries

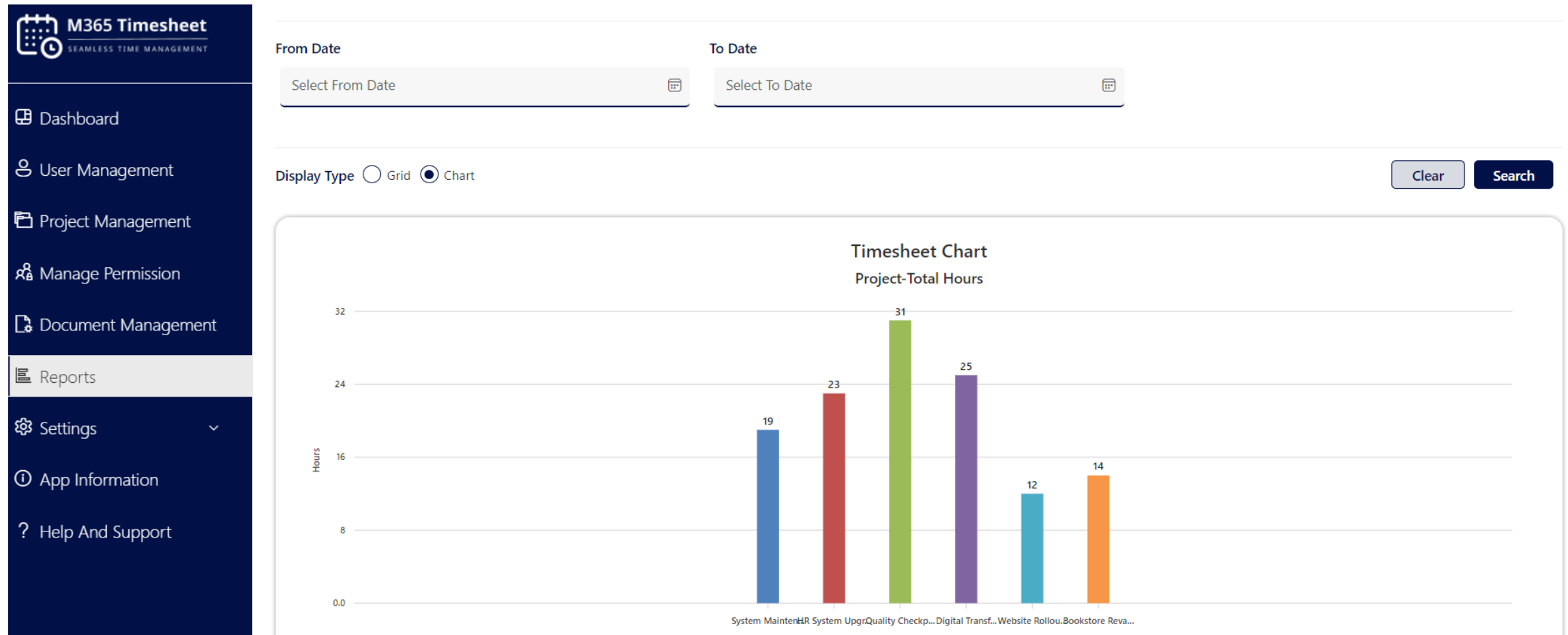
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- Reports will appear in a chart format according to the set filters.



10.Document Management

- Users have the option to upload documents either by clicking on the Browse button or by drag and drop files into the designated area.

 **M365 Timesheet**
SEAMLESS TIME MANAGEMENT

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Select User

Login As






Document Management

Drag and Drop Files to upload
or

Browse

Export

Search

 File Name	Delete
 Task.csv	
 Employees (3).xlsx	

Show entries

5

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11. 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.

11.1 General setting

- Select weekending date.
- Select the Date format.
- Click on the Save Button

The screenshot displays the 'General Setting' page of the M365 Timesheet application. A dark blue sidebar on the left contains the application logo and a menu with items: Dashboard, User Management, Project Management, Manage Permission, Document Management, Reports, Settings (highlighted), General Setting (sub-item), Timesheet Setting, and App Information. The main content area is titled 'General Setting' and features two tabs: 'Set Week Ending Day/Date' (active) and 'Project/Task Setting'. Under the active tab, there are two sections. The first, 'Select Week Ending Day', shows radio buttons for Monday through Sunday, with 'Friday' selected; a blue box with the number '1' and an arrow points to the 'Sunday' option. The second section, 'Select Date Format', shows radio buttons for 'DD-MM-YYYY' and 'MM-DD-YYYY', with 'MM-DD-YYYY' selected; a blue box with the number '2' and an arrow points to this option. A 'Save' button is located at the bottom right of the settings area, with a blue box containing the number '3' and an arrow pointing to it.

➤ Project/Task Setting

- 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”.
- Click on save, once the selection is done.
- 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.

The screenshot displays the M365 Timesheet application interface. On the left is a dark blue sidebar with the logo 'M365 Timesheet SEAMLESS TIME MANAGEMENT' at the top. Below the logo are menu items: Dashboard, User Management, Project Management, Manage Permission, Document Management, Reports, and Settings (with an upward arrow). The 'Settings' menu is expanded, showing 'General Setting' (highlighted in light grey) and 'Timesheet Setting'. The main content area is titled 'General Setting' and contains two tabs: 'Set Week Ending Day/Date' and 'Project/Task Setting' (which is active and highlighted in dark blue). Under the 'Project/Task Setting' tab, there is a section titled 'Setting for Project/ Task by User' with two radio button options: 'Admin and Manager (Only Admin & Manager can add projects/tasks)' and 'All users (Admin & Manager can add projects/tasks, Employees can add tasks only)'. The second option is selected. A dark blue 'Save' button is located at the bottom right of the settings area.

M365 Timesheet
SEAMLESS TIME MANAGEMENT

Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Settings ^

General Setting
Timesheet Setting

General Setting

Set Week Ending Day/Date | Project/Task Setting

Setting for Project/ Task by User

☐ Admin and Manager (Only Admin & Manager can add projects/tasks)

☒ All users (Admin & Manager can add projects/tasks, Employees can add tasks only)

Save

11.2. Timesheet setting

➤ Email Setting

A new option has been added to the email settings. The admin can now choose whether the timesheet should be approved directly or require the manager's approval first. Additionally, you now have the option to send an email for timesheet approval or to notify the manager when the timesheet is directly approved.

The screenshot displays the 'M365 Timesheet' application interface. On the left is a dark blue sidebar with a menu containing: Dashboard, User Management, Project Management, Manage Permission, Document Management, Reports, Settings (with a caret icon), General Setting, Timesheet Setting (highlighted), and App Information. The main content area is titled 'Timesheet Setting' and features three tabs: 'Email Setting' (active), 'Benchmark Setting', and 'Billable/ Non-billable'. Below the tabs, the 'Timesheet Submission' section has two radio buttons: 'Manager Approved' (selected) and 'Direct Submission'. A blue box labeled '1' has an arrow pointing to the 'Direct Submission' radio button. The 'Notify Manager' section has a toggle switch that is currently turned on. A blue box labeled '2' has an arrow pointing to this toggle switch. A 'Save' button is located at the bottom right, with a blue box labeled '3' and an arrow pointing to it.

➤ Benchmark Setting

In the benchmark settings, the admin has the option to set a daily hour's benchmark. For example, if the admin sets the benchmark to 10 hours, employees cannot enter more than 10 hours a day in their timesheets. If the entered hours exceed 10, a validation error will be triggered.

M365 Timesheet
SEAMLESS TIME MANAGEMENT

Timesheet Setting

Email Setting **Benchmark Setting** Billable/ Non-billable

Note : Changes in benchmark will effect in the old timesheet. Please make sure to take the backup of old timesheet before any changes.

Benchmark Daily Hours *

1

2

Clear Save

➤ Billable/ Non-Billable Setting

In the Billable/Non-Billable tab, users have the option to decide whether their organization needs the Billable checkbox in the timesheet. If the "Hide Billable" option is selected, the Billable checkbox will be removed from the timesheet.

M365 Timesheet
SEAMLESS TIME MANAGEMENT

Timesheet Setting

Email Setting | Benchmark Setting | **Billable/ Non-billable**

Note : On selection of billable/ non-billable setting, the billable/ non-billable checkboxes will be display in new timesheet page.

Display Setting

☒ Show Billable ☐ Hide Billable **1** **Save** **2**

Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Settings
General Setting
Timesheet Setting
App Information

12. 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:

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

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:

- Versatile Dashboard
- Data Import
- Enhanced Employee Section
- Project and Task Import
- Super User Access
- Extensive Settings Section
- Advanced Permissions
- Activity Tracking Logs
- Flexible Timesheet Settings
- Report
- Document Library Functionality

Timesheet Enterprise Version:

We offer customization options to tailor the application to your unique requirements for an additional cost. Visit our website to learn more about how our Enterprise Version Timesheet Application can streamline your workflow and boost productivity!

Thank you for considering our Timesheet Application!

--

Ignatiuz Software

13. Help and Support

We are committed to providing you with a smooth and efficient experience using our Timesheet Application. Below, you will find various resources available to assist you:

1.FAQs:

- Check out our frequently asked questions section for quick answers to common queries about using the application.

2. User Manual Link:

- Include a hyperlink labeled "User Manual" that directs users to the user manual for detailed instructions on using the Microsoft 365 Timesheet (Office and SharePoint App).
- For the user manual click [here](#)

3. Contact Support:

- Provide information about accessing the client support portal for assistance with configuration, access, or any difficulties faced while using the application.
- If you have any questions or face any difficulties configuring or accessing the app, please visit our [client support Portal](#).

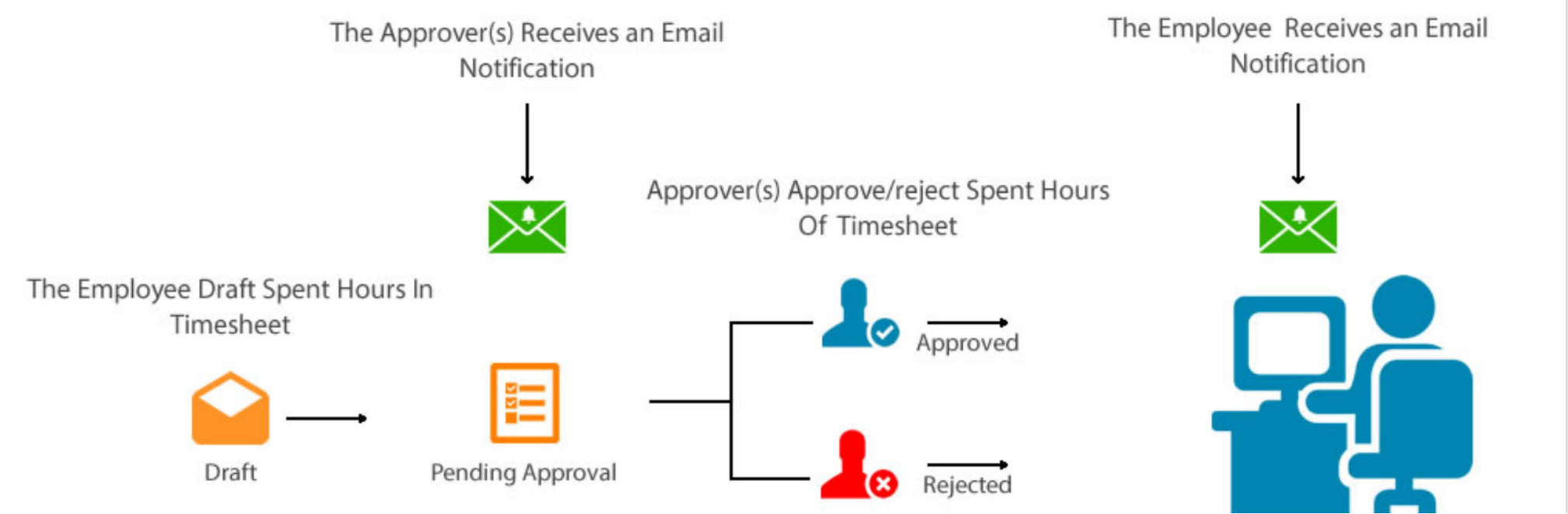
4. Feedback:

- We value your feedback! Share your suggestions, report any issues, or provide general feedback to help us improve our application and better serve your needs.

Help And Support

Welcome to our Timesheet Application! We're here to ensure you have a smooth experience using our application. Below are some resources available to assist you on our website:

- FAQs: Check out our frequently asked questions section for quick answers to common queries about using the application [click here](#).
- User Guide: Our comprehensive user guide provides step-by-step instructions on how to navigate the application, submit timesheets, and utilize its features effectively [click here](#).
- Contact Support: If you encounter any issues or have questions that aren't covered in the FAQs or user guide, please don't hesitate to reach out to our support team. You can contact us via email at support@ignatiuz.com.
- Feedback: We value your feedback! Share your suggestions, report any issues, or provide general feedback to help us improve our application and better serve your needs.



14. Create New Timesheet

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

- Click on the Week ending date text box to open the calendar.
- Select the week-ending date from the calendar.
- If the billable toggle is enabled, all checkboxes will be selected; if disabled, all checkboxes will be unselected.
- Select the Project from the project dropdown.
- If there are many tasks associated with the project, enter the project and task name in the search box for easy selection.
- Select the Task from the task dropdown.
- The Billable and Nonbillable sections will show the total hours added for each day.
- Add the number of hours spent on the task for each day of the week.
- Add descriptions/comments if needed in the description box.
- Click on the “Add rows” button to add new rows if required.
- Click “Save draft” to save the data and allow editing the timesheet later.

14.1. New Timesheet



Dashboard

Timesheet

Document Management

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Help And Support

Timesheet

New Timesheet

Drafted

Submitted

Rejected

Approved

Week Ending Date *

11/15/2024

Billable



Project Name	Task Name	Billable/Non-Billable	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Task Description	Delete	Total Hours
Timesheet Migration	Production Setup	<input checked="" type="checkbox"/>	2	3	1	2	2					10
Sonco	Unit Testing	<input checked="" type="checkbox"/>	2	3	2	1	2					10
Seamless Integration	Unit Testing	<input checked="" type="checkbox"/>	2	2	1	2	1					8
Inotiv	Production Setup	<input checked="" type="checkbox"/>	2		4	3	3					12
Billable			8	8	8	8	8	0	0	40		40
Non Billable			0	0	0	0	0	0	0	0		

Add Rows

Save Draft


Submit

Cancel

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

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

14.2. Drafted Timesheets

 **M365 Timesheet**
SEAMLESS TIME MANAGEMENT

Dashboard

Timesheet

Document Management

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Help And Support

Timesheet

New Timesheet

Drafted




Submitted

Rejected

Approved

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status	Delete
View	09/27/2024	14	0	Erika Geesey	Jamee Solis	Draft	
View	10/18/2024	4	0	Erika Geesey	Jamee Solis	Draft	
View	10/25/2024	4	0	Erika Geesey	Jamee Solis	Draft	

Show entries


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14.3. Submitted Timesheets





M365 Timesheet
SEAMLESS TIME MANAGEMENT


 Dashboard

 Timesheet

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Timesheet

New Timesheet

Drafted




Submitted

Rejected

Approved

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status	Delete
View	07/05/2024	12	0	Erika Geesey	Jamee Solis	Pending Approval	
View	08/09/2024	24	0	Erika Geesey	Jamee Solis	Pending Approval	
View	08/23/2024	32	0	Erika Geesey	Jamee Solis	Pending Approval	

Show entries


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14.4. Rejected Timesheets





M365 Timesheet


SEAMLESS TIME MANAGEMENT


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 Timesheet

 Document Management

 Reports

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Timesheet

New Timesheet

Drafted

Submitted

Rejected

Approved

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status
View	09/13/2024	33	0	Erika Geesey	<div></div> Jamee Solis	Rejected
View	10/04/2024	12	0	Erika Geesey	Jamee Solis	Rejected

Show entries

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14.5. Approved Timesheets



Dashboard

Timesheet

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Help And Support

Timesheet

New Timesheet

Drafted

Submitted

Rejected

Approved

Export



Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status
View	09/20/2024	40	0	Erika Geesey	Jamee Solis	Approved
View	09/06/2024	8	0	Erika Geesey	Jamee Solis	Approved
View	10/11/2024	4	0	Erika Geesey	Jamee Solis	Approved

Show entries

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15. Management - Approval and Rejection of Timesheet

The management portal is used to view all the submitted employee timesheet and their current status.

Management - Can see assigned employee-submitted timesheets.

1. Pending – Will show a pending timesheet which 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 timesheet of employee

15.1. Pending Approval

 **M365 Timesheet**
SEAMLESS TIME MANAGEMENT

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User Management

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Management

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Jamee Solis

Pending Approval

Approved

Rejected

Employee Timesheet

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status
View	07/05/2024	12	0	Erika Geesey	Jamee Solis	Pending Approval
View	08/09/2024	24	0	Erika Geesey	Jamee Solis	Pending Approval
View	08/23/2024	32	0	Erika Geesey	Jamee Solis	Pending Approval

Show entries

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15.2. Approved Timesheets

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



Dashboard

User Management

Project Management

Management

Document Management

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Jamee Solis

Pending Approval

Approved

Rejected

Employee Timesheet

Week Ending Date *

09/20/2024

Employee Name : Erika Geesey

Status : Approved


Project Name	Task Name	Billable/Non-Billable	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Task Description	Delete	Total Hours
Timesheet Migration	Unit Testing	<input checked="" type="checkbox"/>	4	8	8	8	8					36
Timesheet Migration	Production Setup	<input checked="" type="checkbox"/>	4									4
Billable			8	8	8	8	8	0	0	40		40
Non Billable			0	0	0	0	0	0	0	0		

Enter Comment

Rejected

Cancel

9/16/2024 15:43 PM (Approved) : Approved



M365 Timesheet

SEAMLESS TIME MANAGEMENT

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Management

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Jamee Solis

Pending Approval		Approved		Rejected		Employee Timesheet	
Export						Search	
View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status	
View	09/20/2024	40	0	Erika Geesey	Jamee Solis	Approved	
View	09/06/2024	8	0	Erika Geesey	Jamee Solis	Approved	
View	10/11/2024	4	0	Erika Geesey	Jamee Solis	Approved	
Show entries		10		Page 1 of 1		Previous	Next

15.3. Rejected Timesheets



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Jamee Solis

Pending Approval

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Employee Timesheet

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status
View	09/13/2024	33	0	Erika Geesey	Jamee Solis	Rejected
View	10/04/2024	12	0	Erika Geesey	Jamee Solis	Rejected

Show entries


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15.4. Employee Timesheets

 **M365 Timesheet**
SEAMLESS TIME MANAGEMENT

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Pending Approval

Approved

Rejected

Employee Timesheet

Export

Search

View	Week Ending Date	Billable	Non Billable	Employee	Manager	Status
View	09/13/2024	33	0	Erika Geesey	Jamee Solis	Rejected
View	09/20/2024	40	0	Erika Geesey	Jamee Solis	Approved
View	09/06/2024	8	0	Erika Geesey	Jamee Solis	Approved
View	10/04/2024	12	0	Erika Geesey	Jamee Solis	Rejected
View	10/11/2024	4	0	Erika Geesey	Jamee Solis	Approved
View	07/05/2024	12	0	Erika Geesey	Jamee Solis	Pending Approval
View	08/09/2024	24	0	Erika Geesey	Jamee Solis	Pending Approval
View	08/23/2024	32	0	Erika Geesey	Jamee Solis	Pending Approval

Show entries

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Next

16. 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.

SharePoint

Search

MT

M365Timesheet

Private group 1 member

+ New

Site usage Site workflows Site settings Recycle bin (3)

<div></div>	Project	List	4	9/16/2024 6:33 AM
<div></div>	Project Task	List	8	9/16/2024 6:34 AM
<div></div>	Setting	List	1	9/16/2024 4:38 AM
<div></div>	Task	List	2	9/16/2024 5:09 AM
<div></div>	Theme	List	0	9/16/2024 4:34 AM
<div></div>	Timesheet Users	List	4	9/16/2024 5:27 AM
<div></div>	UserLog	List	17	9/16/2024 6:57 AM
<div></div>	Apps for SharePoint		1	9/16/2024 4:30 AM
<div></div>	Events		0	9/16/2024 2:22 AM
<div></div>	M365 Timesheet	App		9/16/2024 4:33 AM
<div></div>	Site Pages	Page library	9	9/16/2024 4:53 AM

1

Monitor

Remove

SharePoint

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Private group 1 member

New

Site usage

Site workflows

Site settings

Recycle bin (3)

Project	List	4	2 3 AM
Project Task	List	8	9/16/2024 6:34 AM
Setting	List	1	9/16/2024 4:38 AM
Task			
Theme			
Timesheet Users			
UserLog			
Apps for SharePoint	List	1	9/16/2024 4:30 AM
Events	Events list	0	9/16/2024 2:22 AM
M365 Timesheet	App		9/16/2024 4:33 AM
Site Pages	Page library	9	9/16/2024 4:53 AM

Action isn't supported in this view

We are working to add that functionality to this page. In the meantime, please go to classic SharePoint to complete this task.

Return to classic SharePoint

Close

- Find the Microsoft 365 Timesheet and Click on three dots.
- Click on three dots.
- Click on Remove-to-remove application.

SharePoint

MT Site contents

Site contents

Lists, Libraries, and other Apps

Exit classic experience

add an app

DailyDetails
new! 13 items
Modified 30 minutes ago

Events
0 items
Modified 5 hours ago

MyDocuments
new! 2 items
Modified 2 hours ago

Setting
new! 1 item
Modified 3 hours ago

Apps for SharePoint
new! 1 item
Modified 3 hours ago

DashboardLinks
new! 8 items
Modified 3 hours ago

Form Templates
0 items
Modified 5 hours ago

NonExistingUser
new! 0 items
Modified 3 hours ago

Site Assets
33 items
Modified 5 hours ago

Authorized Users
new! 3 items
Modified 2 hours ago

Department
new! 0 items
Modified 3 hours ago

License Info
new! 0 items
Modified 3 hours ago

Project Task
new! 8 items
Modified 52 minutes ago

Site Pages
9 items
Modified 3 hours ago

M365 Timesheet
Version: 1.0.0.0
M365 Timesheet description
ABOUT DETAILS REMOVE

M365 Timesheet
new! ***

Project
new! 4 items
Modified 53 minutes ago

Style Library
0 items
Modified 4 weeks ago

SITE WORKFLOWS SETTINGS RECYCLE

Search this site



Thank You

For Your Attention