User Guide –Microsoft 365 Timesheet





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

Table of Content

1. Login to Microsoft 365 or SharePoint 2. Role-Based Navigation Bar 3. Default Admin 4. Handling Role Combinations 5. Dashboard 5.1 Admin Dashboard 5.1.1 Cards 5.1.2 Add Shortcut 5.2. Manager Dashboard 5.3. Employee Dashboard 6 How to Create User Roles 6.1. Add User Roles 6.1.1 Add Manually 6.1.2 Bulk Import 6.2. Add Employee 6.2.1 Add Manually 6.2.2 Bulk Import 6.3 Super Manager 7. Add Project and Task 7.1. Add Project 7.1.1 Add Manually 7.1.2 Bulk Import 7.2. Add Task 7.2.1 Add Manually 7.2.2 Bulk Import

7.3. Assign Project to Task

8. Manage Permission 8.1 Authorized Access 8.2 Authorized logs 8.3 Select App users 9. Reports 10. Document Management 11. Settings 11.1 General setting 11.2 Timesheet setting 12. App Information 13. Help and Support 14. Create New Timesheet 14.1 New Timesheet 14.2 Drafted 14.3 Submitted 14.4 Rejected 14.5 Approved 15. Management -Approval and Rejection of Timesheet 15.1 Pending Approval 15.2 Approved 15.3 Rejected 15.4 Employee Timesheet

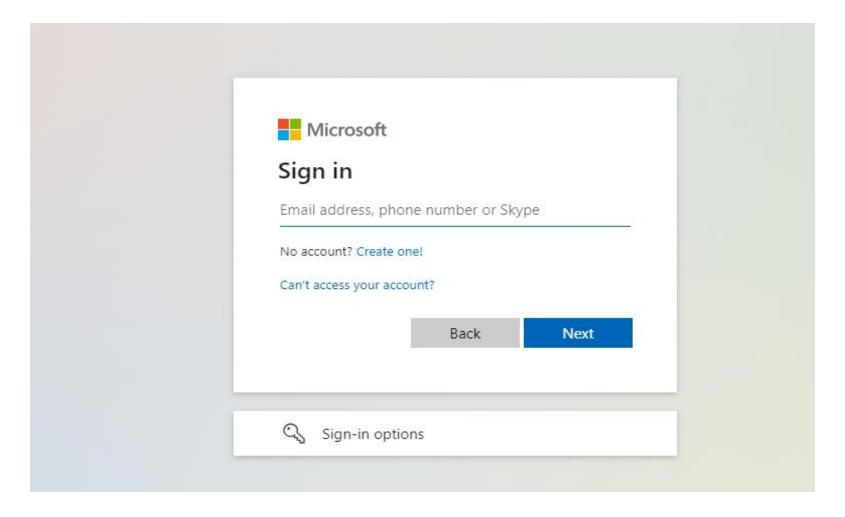
16. Delete the app from the site?

1. Login to Microsoft 365 or SharePoint

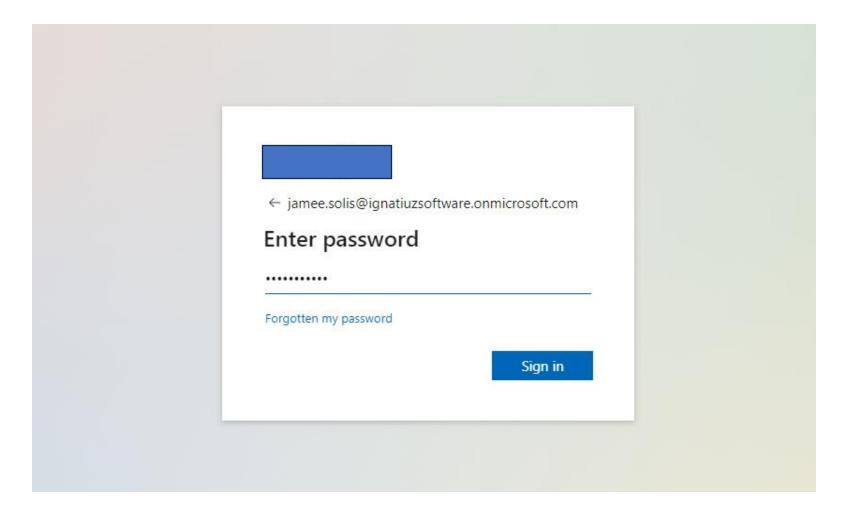
Navigate to the Microsoft 365 login page using the URL: https://www.office.com/



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

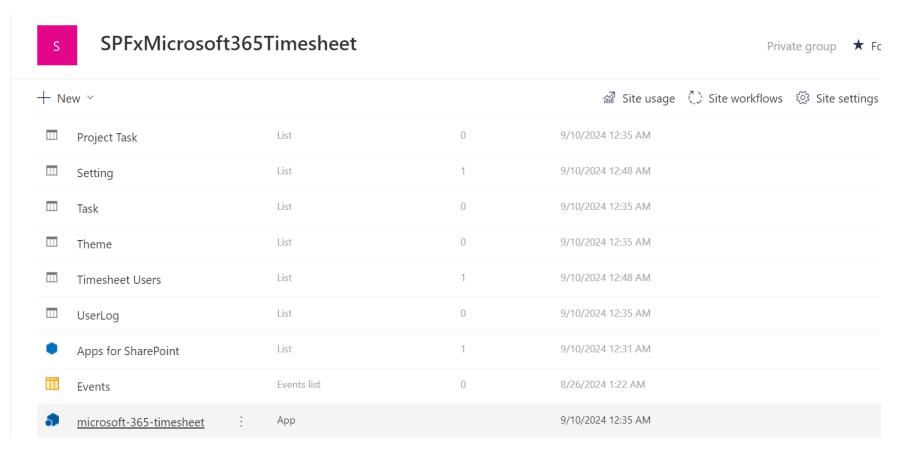


• Opening the SharePoint Site: Enter the URL of the SharePoint site in the web browser's address bar to access the site.

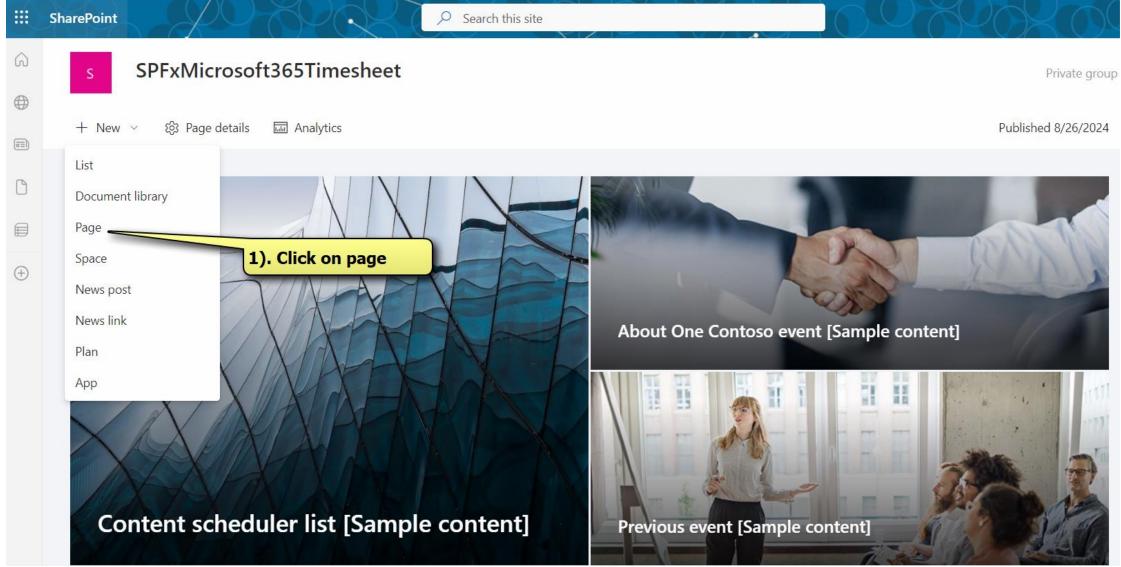


Accessing Site Contents:

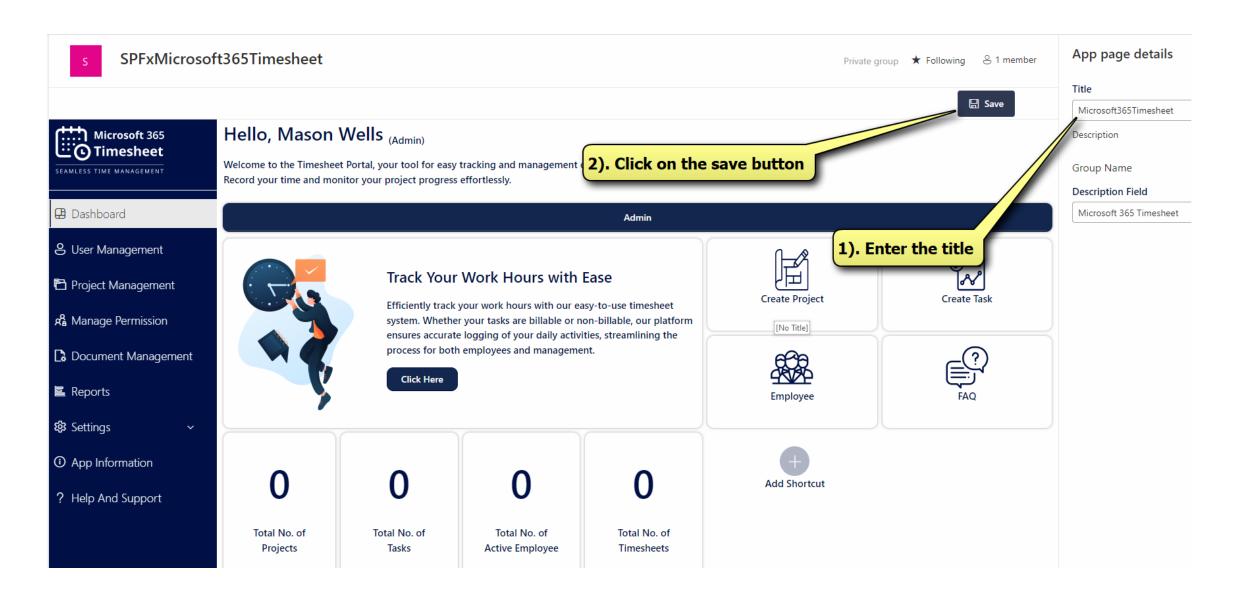
- Refer to **step 1** in the screenshot below, where the settings (gear icon) are located at the top right corner of the SharePoint page.
- Click on the settings icon to reveal the menu.
- From the menu, choose "Site contents." This will redirect you to the page displaying all installed app (applications).



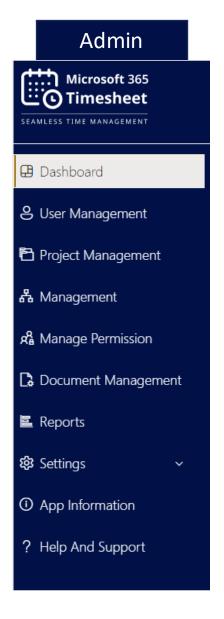
• After installing the app, add the app to the page.

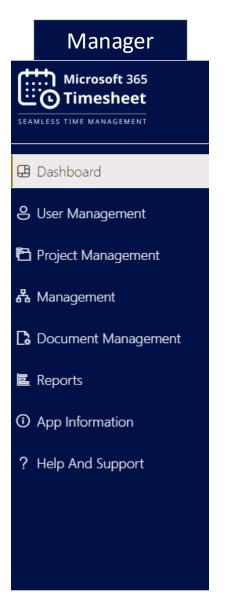


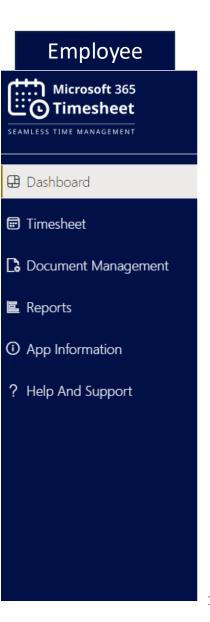




2. Role-Based Navigation Bar

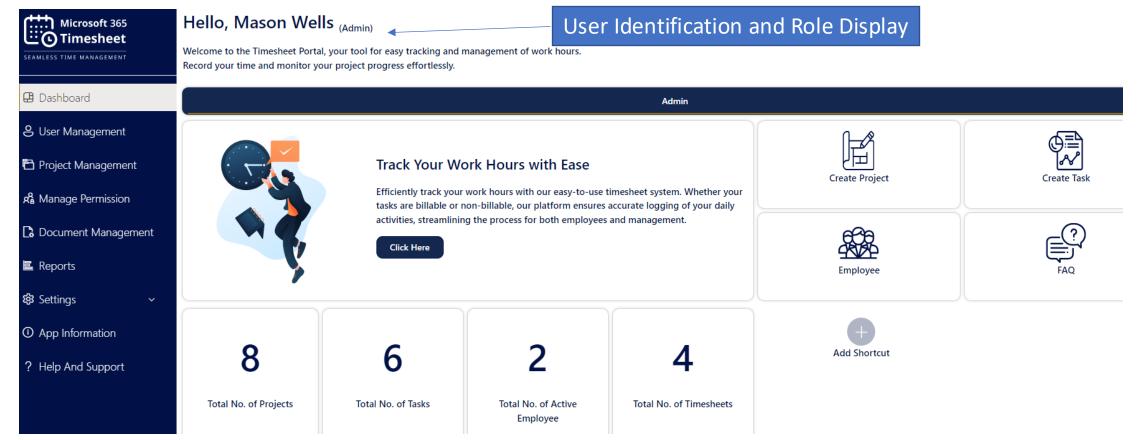






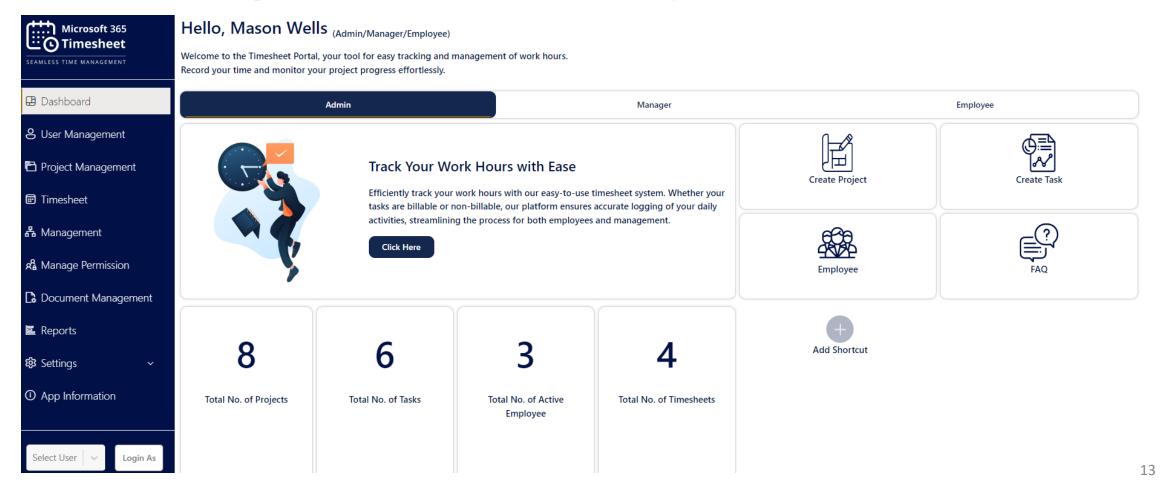
3. Default – Admin

- **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.



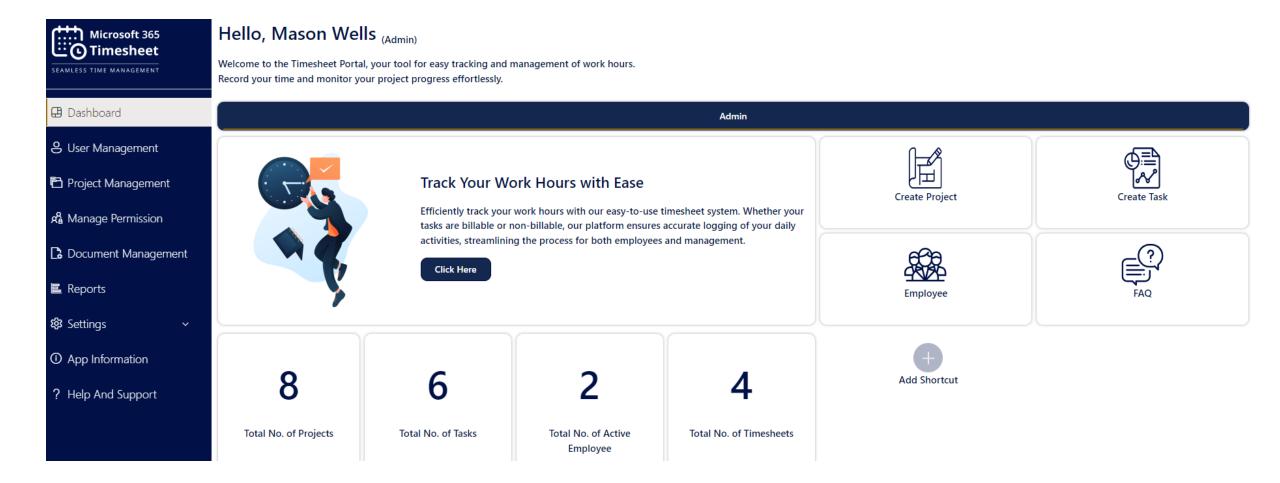
4. Handling Role Combinations

- 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



5. Dashboard

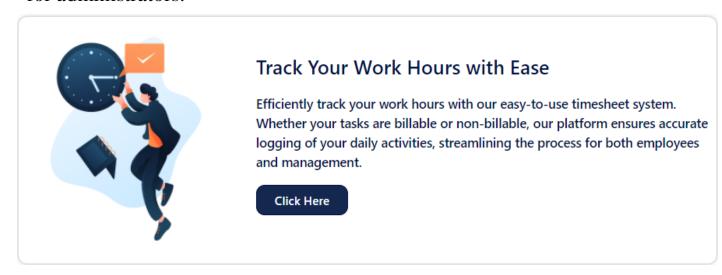
5.1 Admin Dashboard



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.



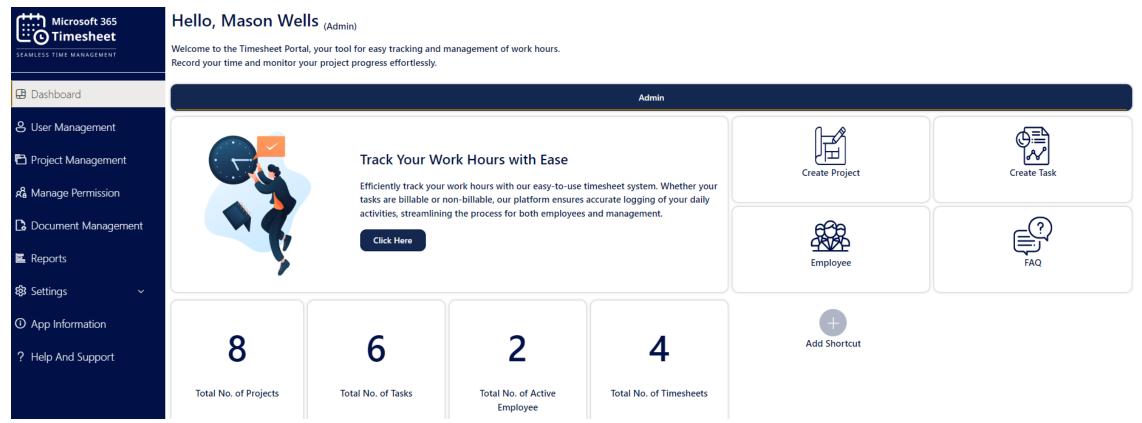


"Click Here" Button for External Link:

 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...

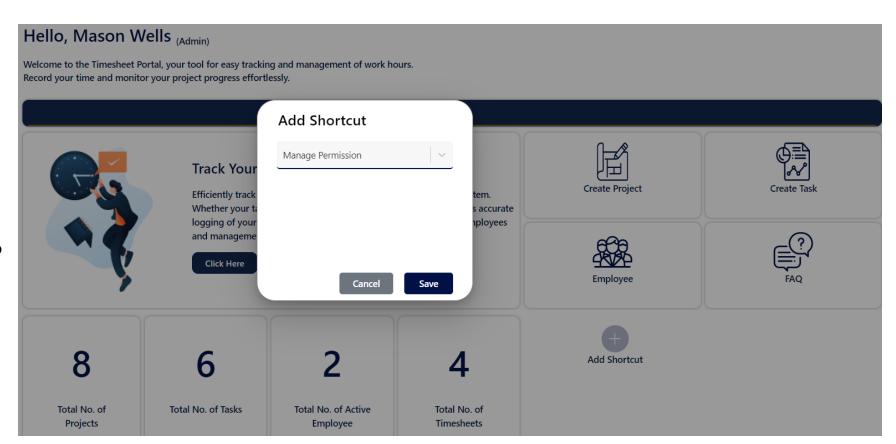


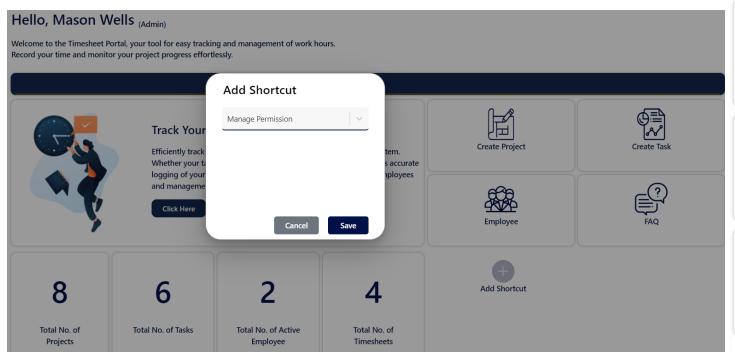
5.1.2. Add Shortcut

> Introducing the Shortcut Feature / Quick Links:

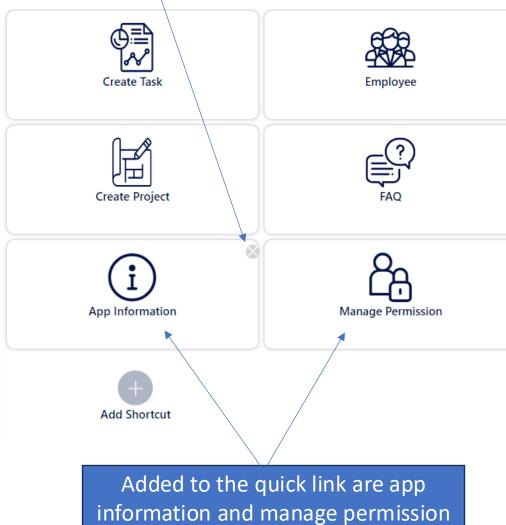
To enhance dashboard customization for administrators, we have introduced the shortcut feature. Admins can now select frequently used quick links for easy access in their daily tasks. To utilize this feature, follow these simple steps:

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



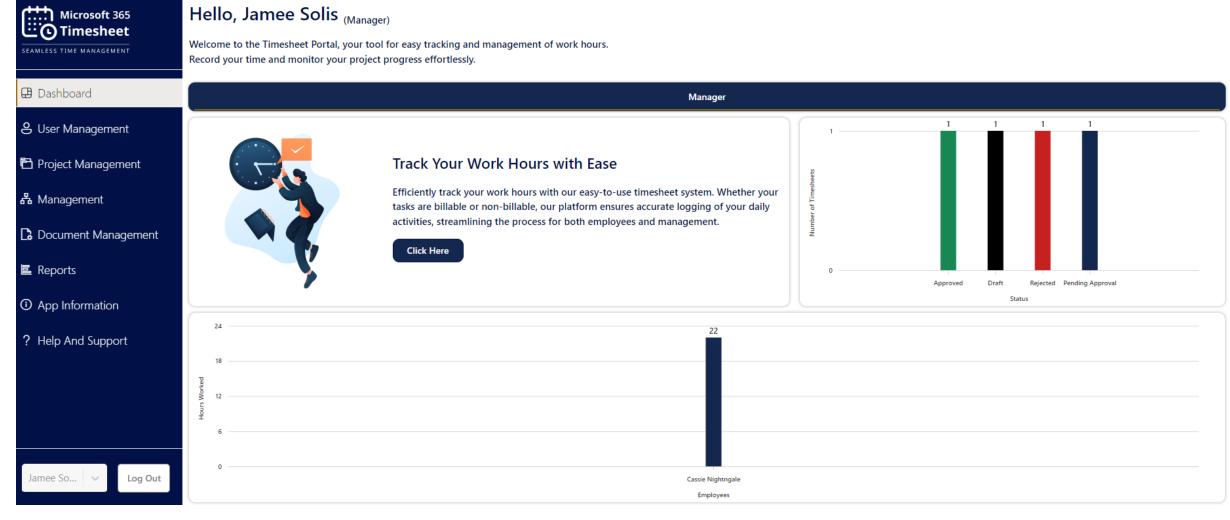


To Remove shortcut, click on cross



5.2.Manager 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:

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

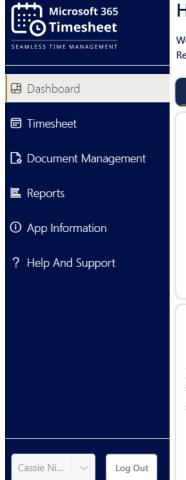
➤ Hours Worked Bar Graph:

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.



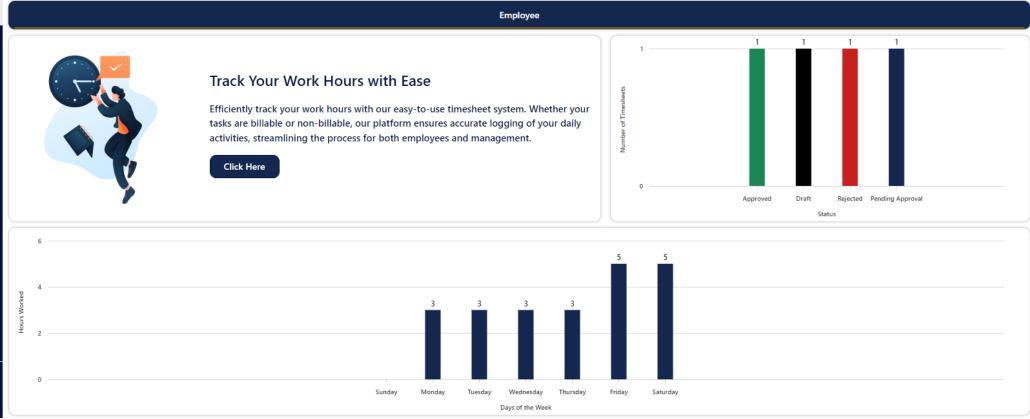
5.3.Employee Dashboard

- Timesheet Status Bar Graph
- Hours Worked Bar Graph



Hello, Cassie Nightngale (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.



➤ User Identification and Role Display:

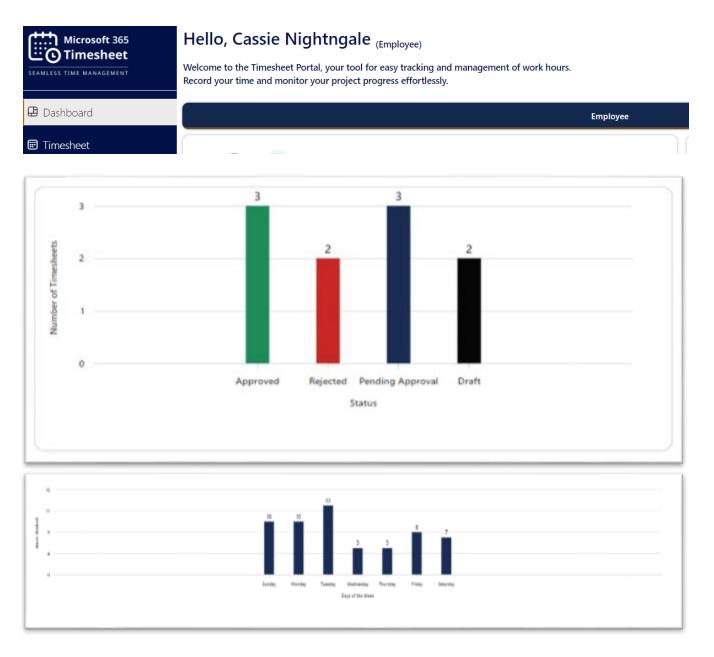
Retrieve and prominently display the current user's role (e.g., Manager) on the dashboard for easy identification.

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.

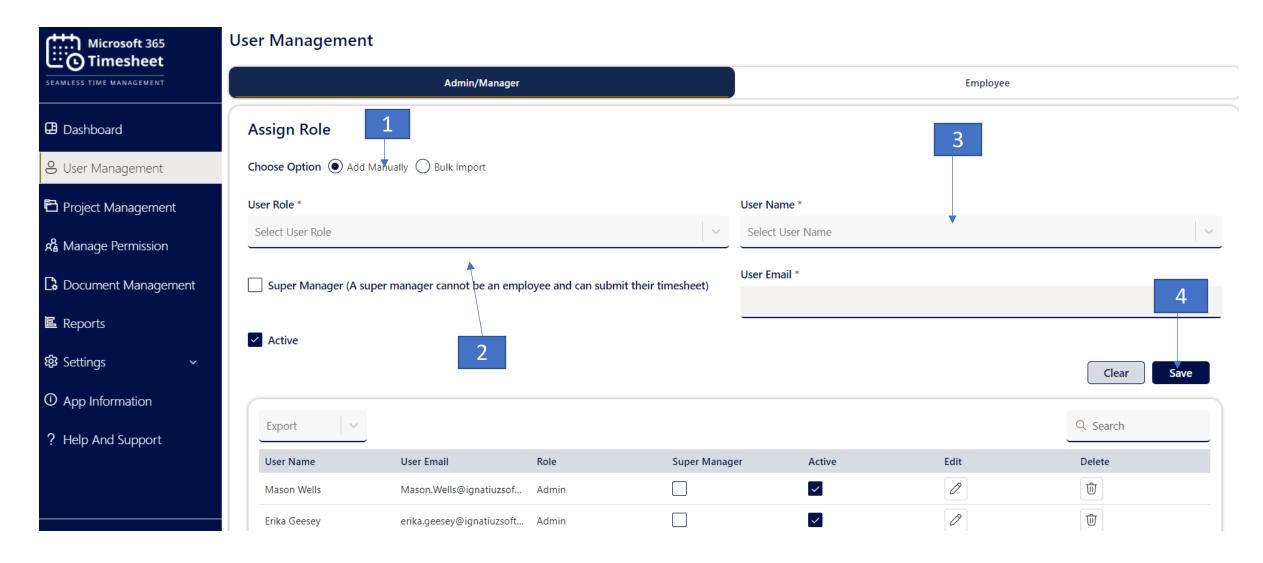


6. How to create a new user role

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

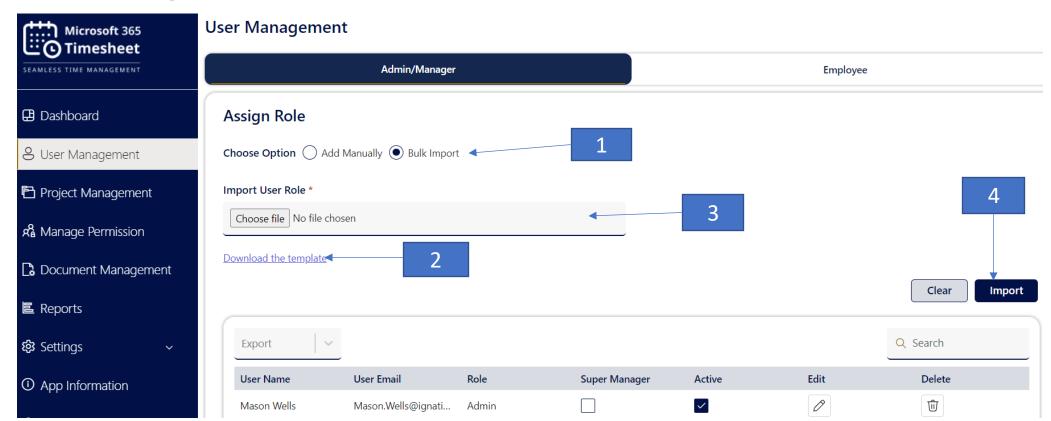


6.1.2 Bulk Import

> 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.

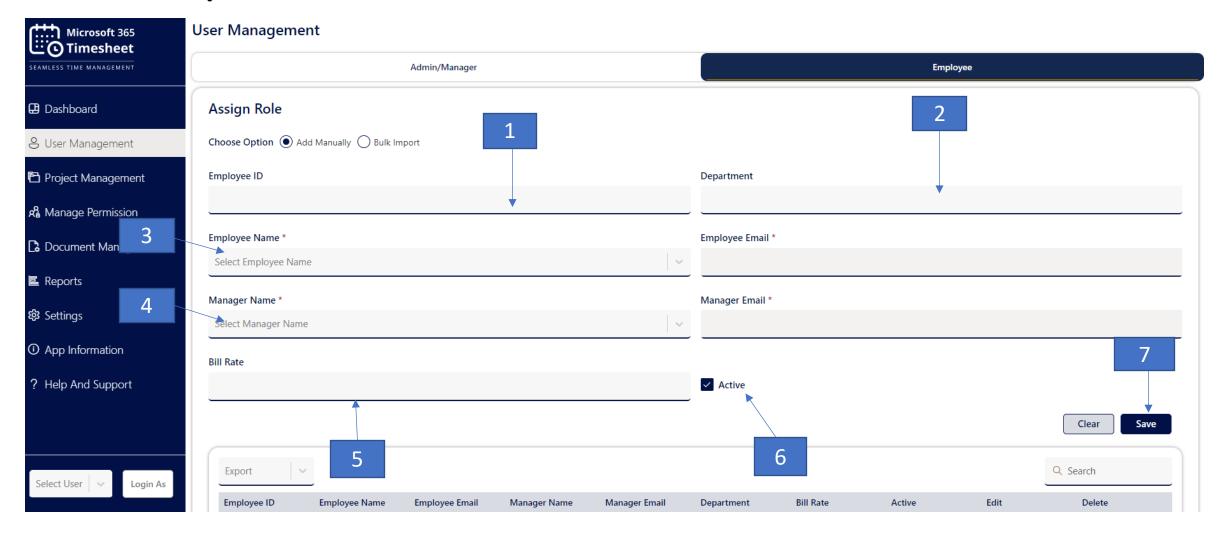


6.2 Add New Employee:

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



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.

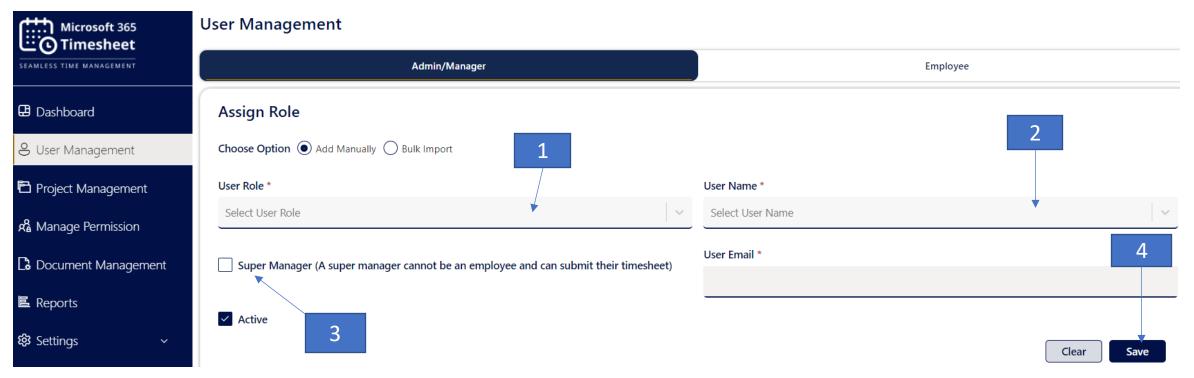


6.3 Super Manager

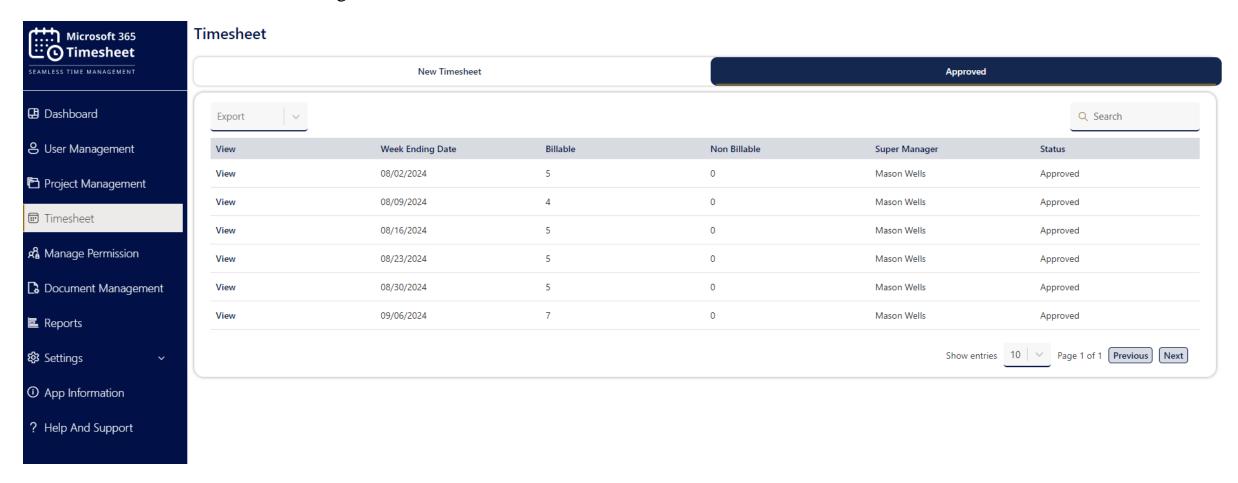
➤ Add New Super Manager Role

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.



- 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.



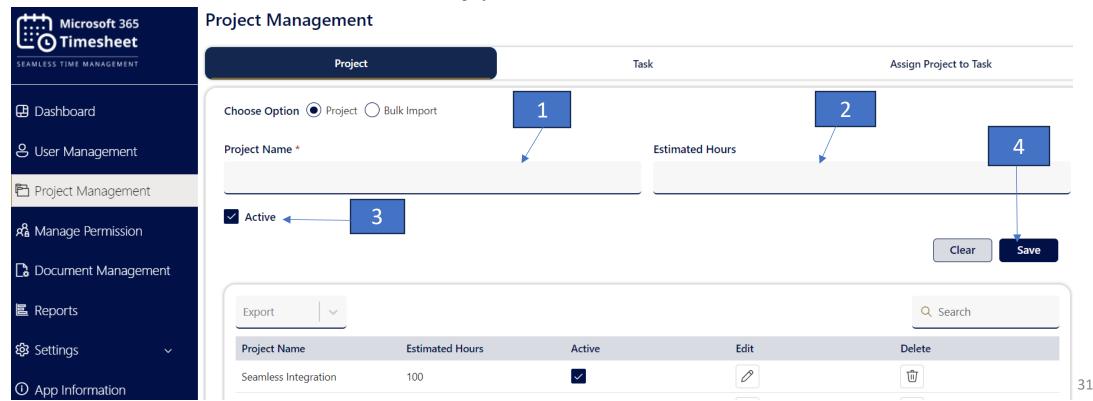
7. Add Project and Task

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.

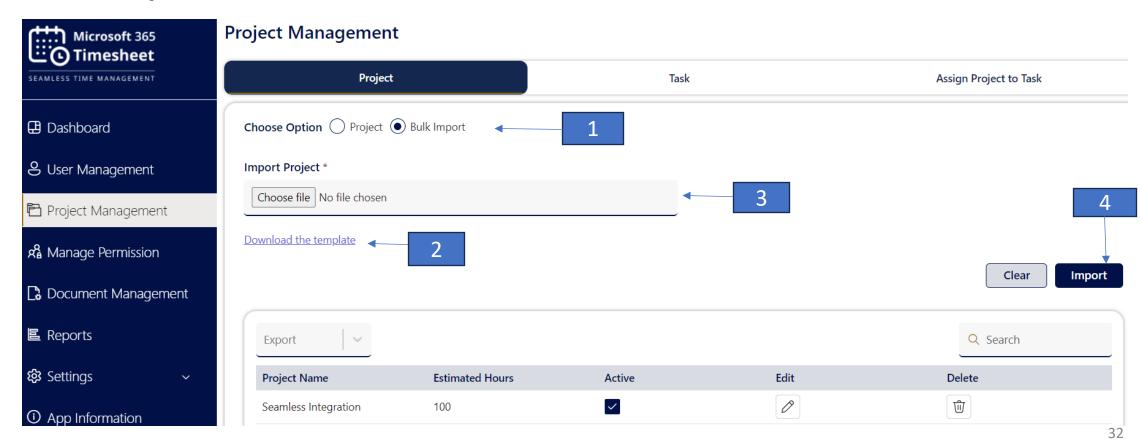


7.1.2 Bulk Import

> Import Project

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

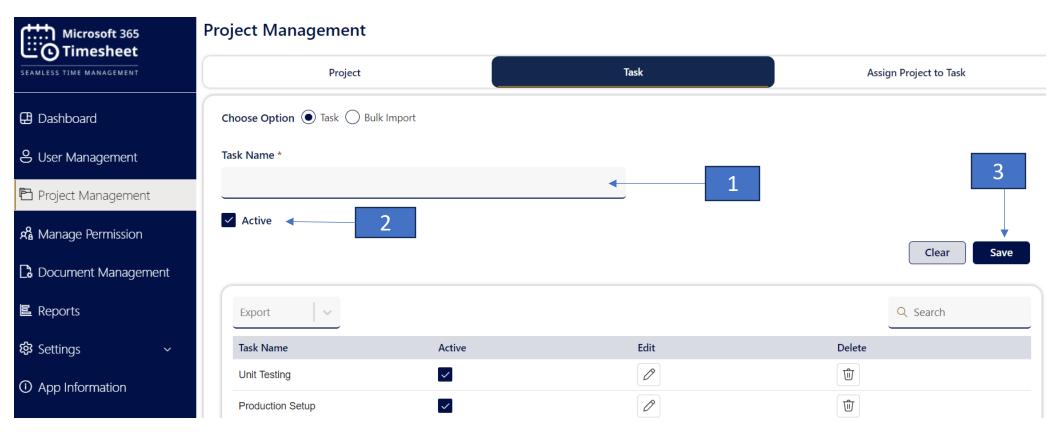
- Select the "Bulk Import" radio button.
- Download the correct format Excel file directly.
- Add projects to the downloaded Excel file.
- Select the file by clicking on the "Choose file" button.
- Upload the file back to this page.
- Click on the import button.



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.

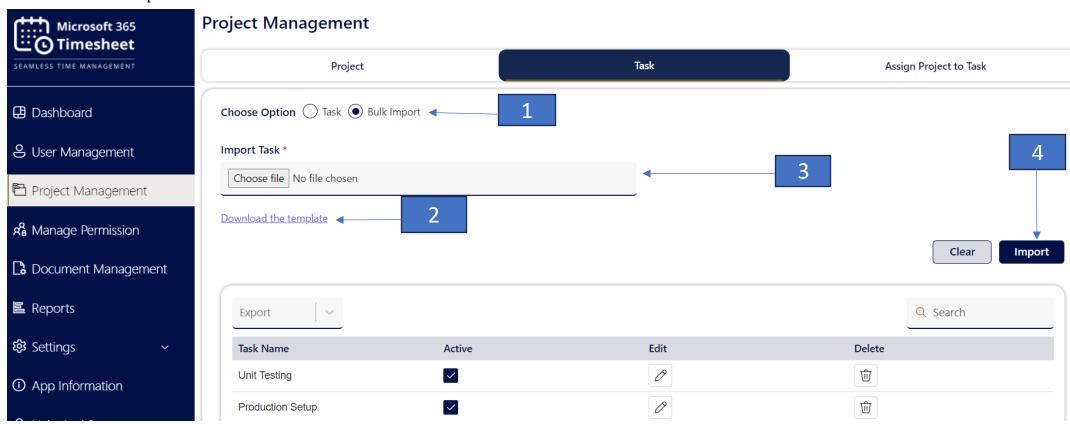


7.2.2 Bulk Import

Import Task

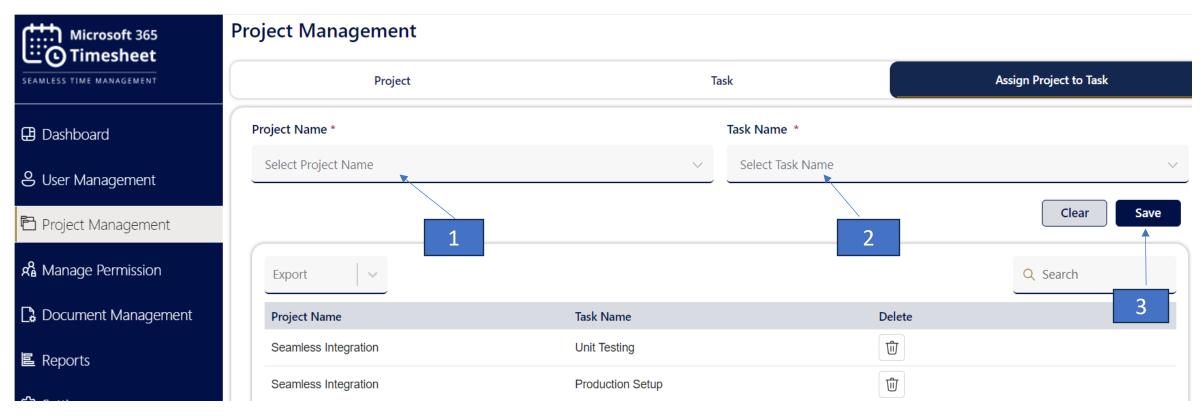
On the Task tab, you can see the "Bulk Import" option with a radio button.

- 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.



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.



> 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

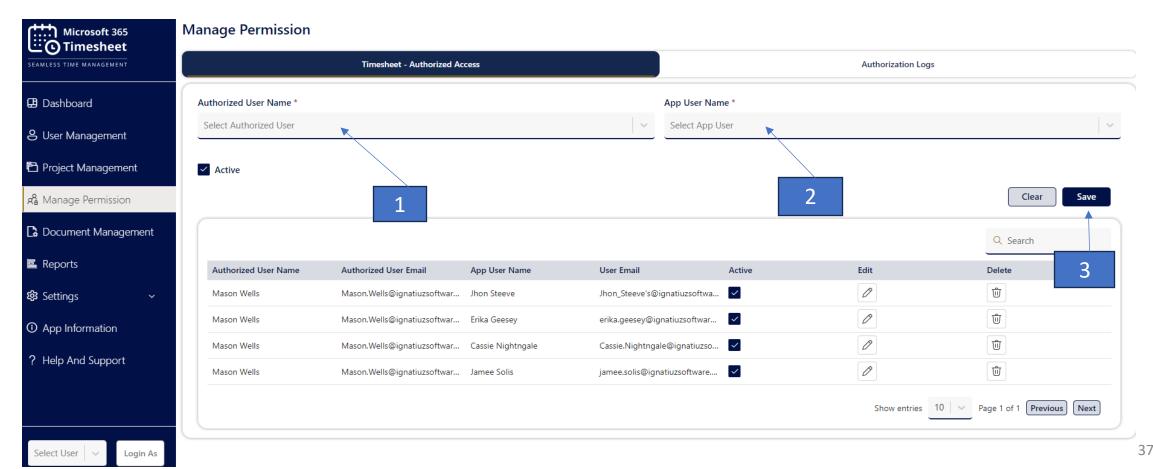
2. Excel Format for Task

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

8. Manage Permission

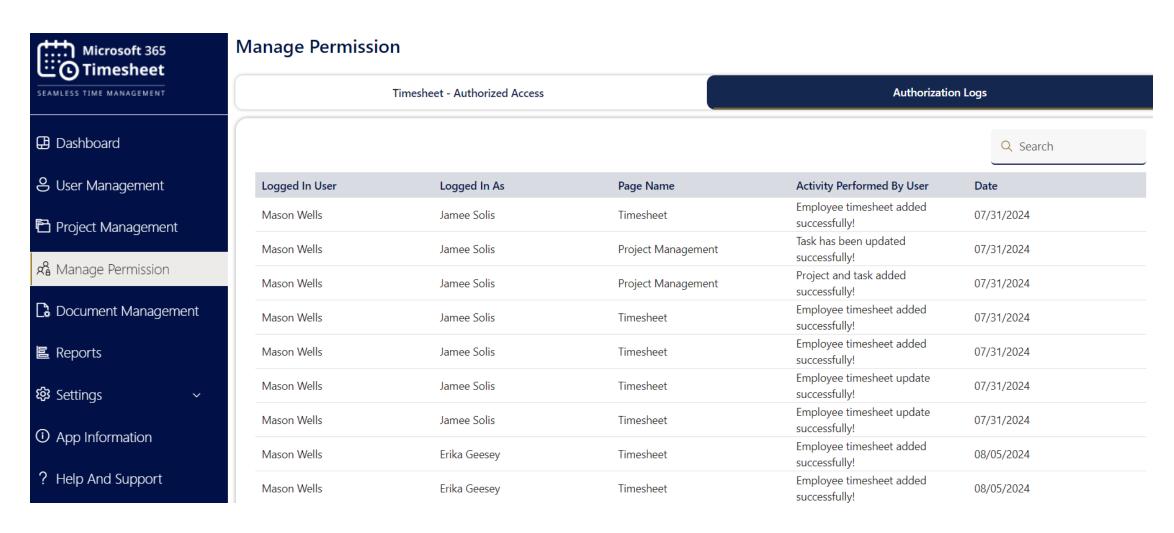
8.1 Authorized Access

- 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.



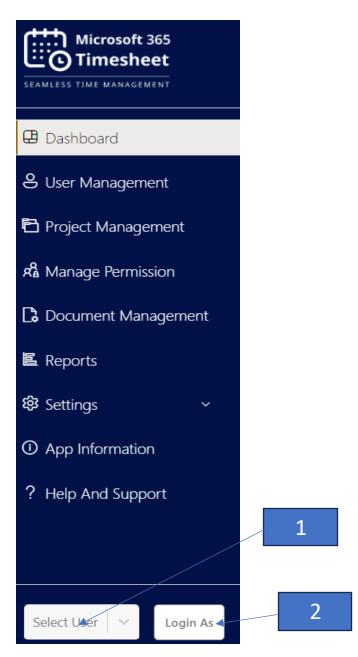
8.2 Authorized logs

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.



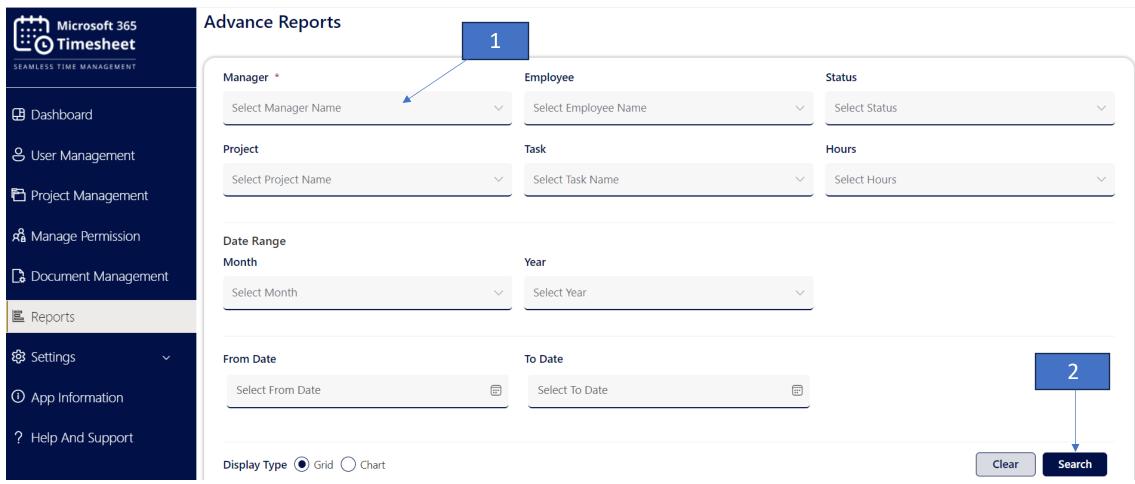
8.3. Select App User:

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

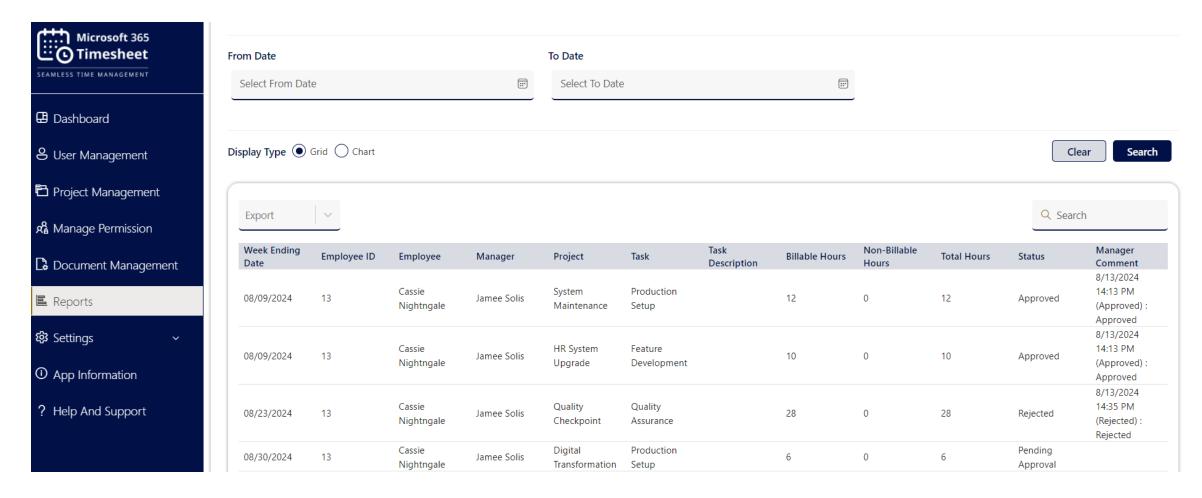


9. Reports

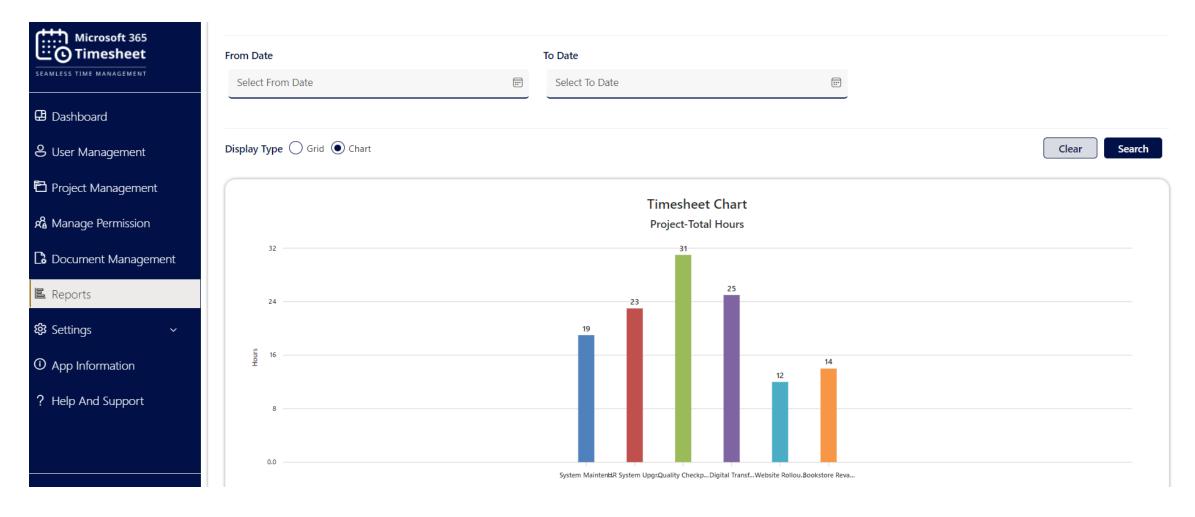
- Within the Reports section, provide available filters such as Manager Name, date range, employee name, project, or timesheet status.
- After selecting the desired filters, users can click on the "Search" button to generate the report.



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

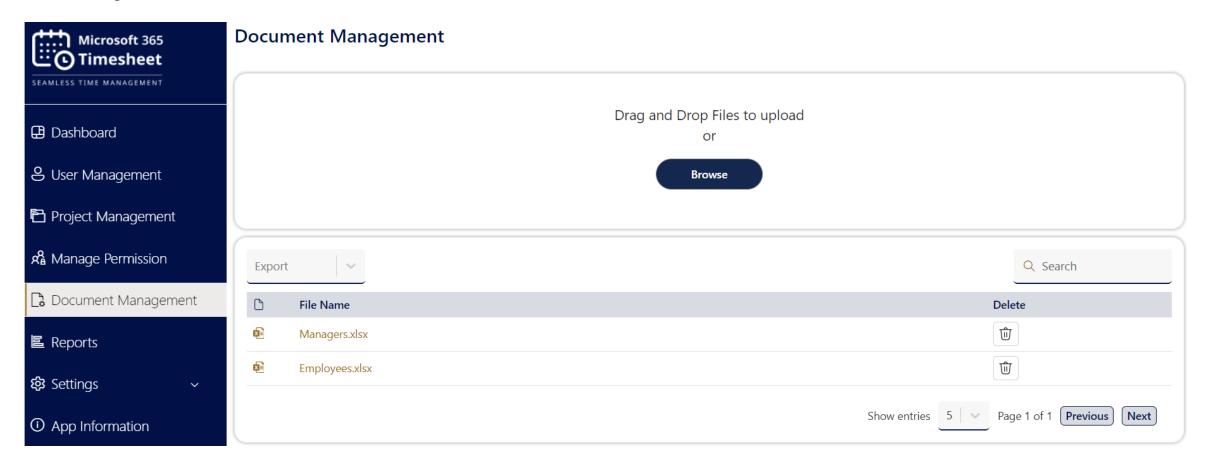


• Reports will appear in a chart format according to the set filters.



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.

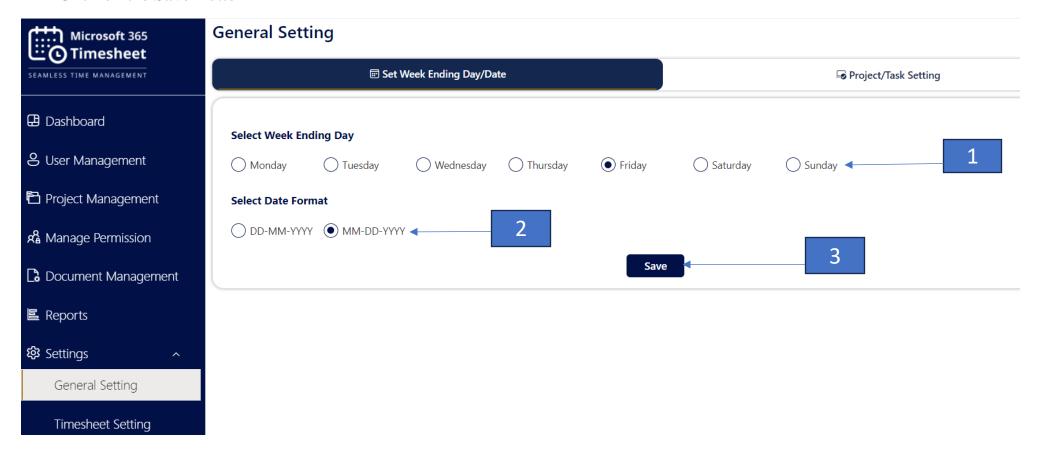


11. Setting

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.

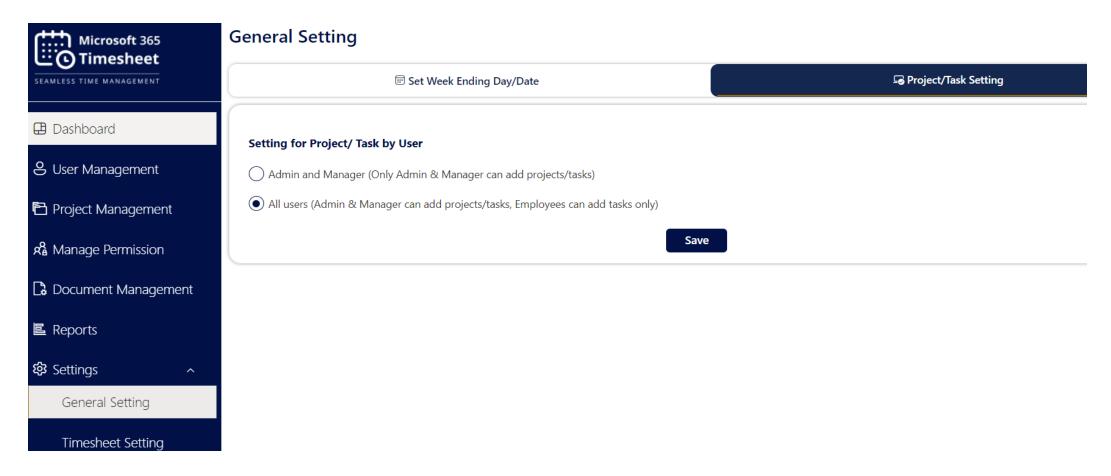
11.1 General setting

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



➤ Project/Task Setting

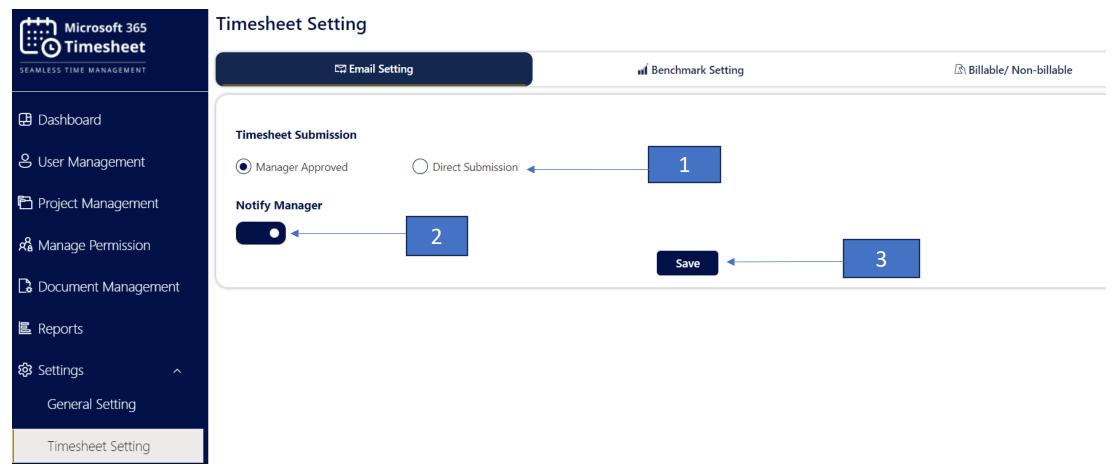
- By default, the selected option will be "All Users", but if the admin wants that employee should not add a task in the application so now the admin can restrict this by selecting another option that is "Admin and manager only".
- Click on save, once the selection is done.
- This will help the admin 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.



11.2. Timesheet setting

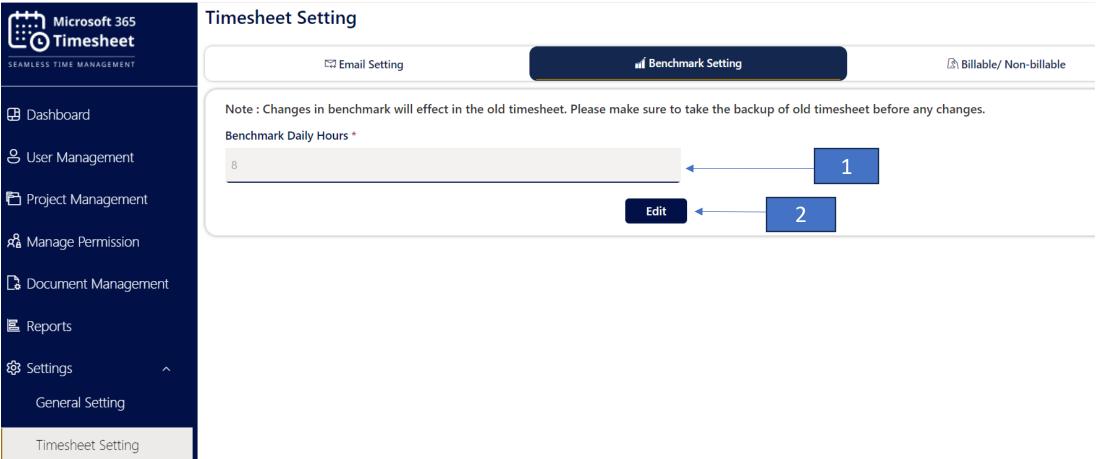
Email Setting

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.



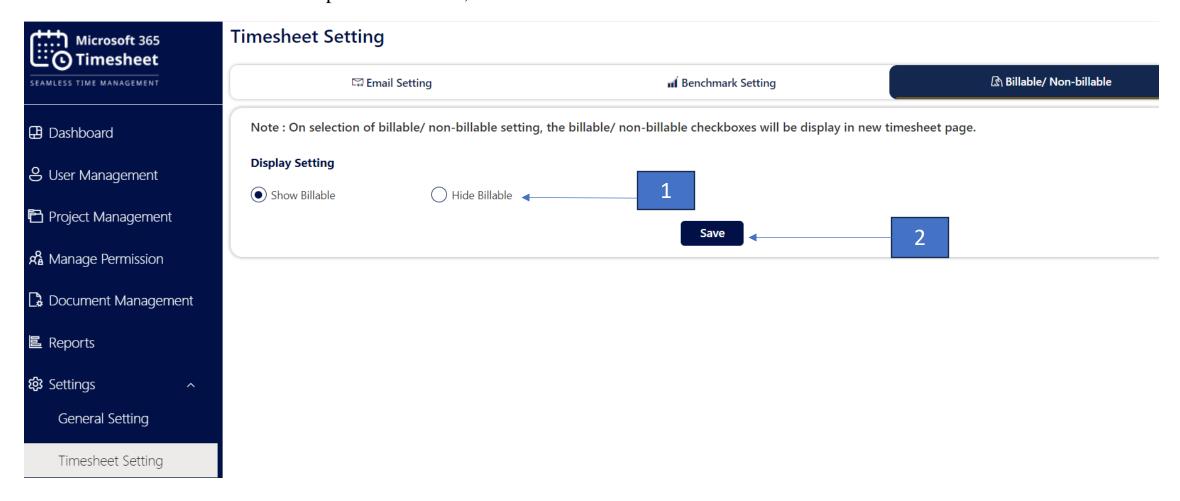
Benchmark Setting

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.



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.

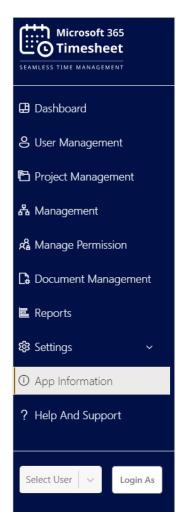


12. App Information

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:

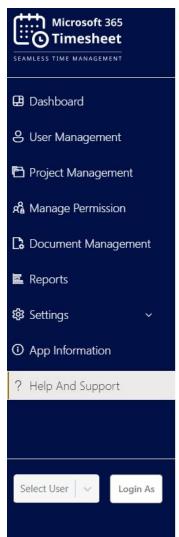
- Include a hyperlink labeled "User Manual" that directs users to the user manual for detailed instructions on using the Microsoft 365 Timesheet (Office and SharePoint App).
- For the user manual click **here**

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:

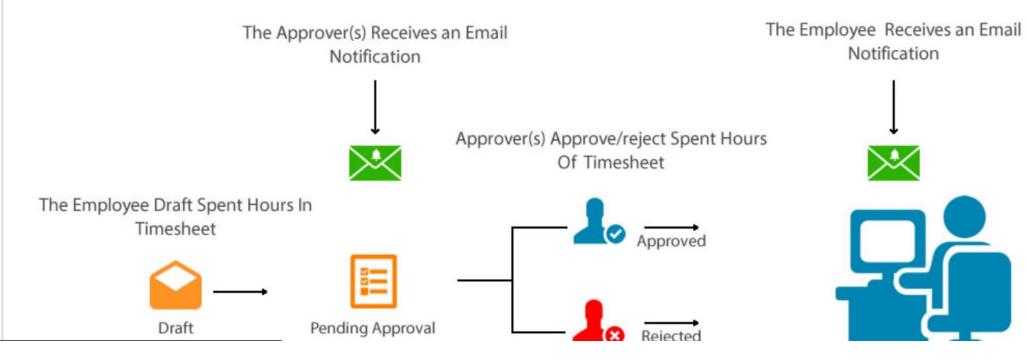
We value your feedback! Share your suggestions, report any issues, or provide general feedback to help us improve our application and better serve your needs.



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.

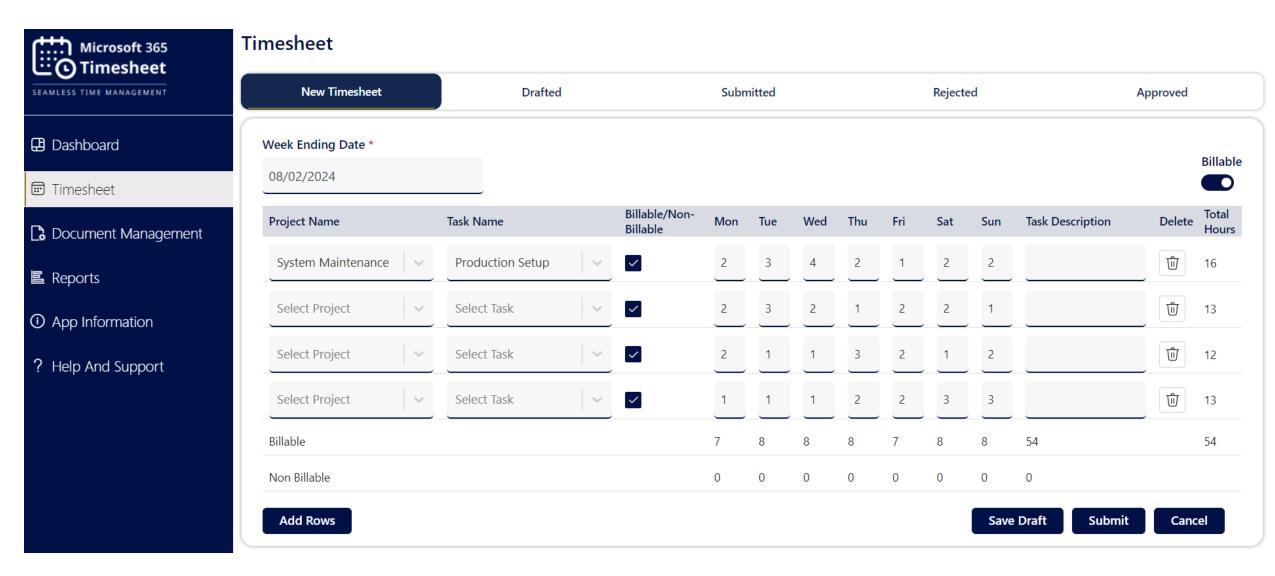


14. Create New Timesheet

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.

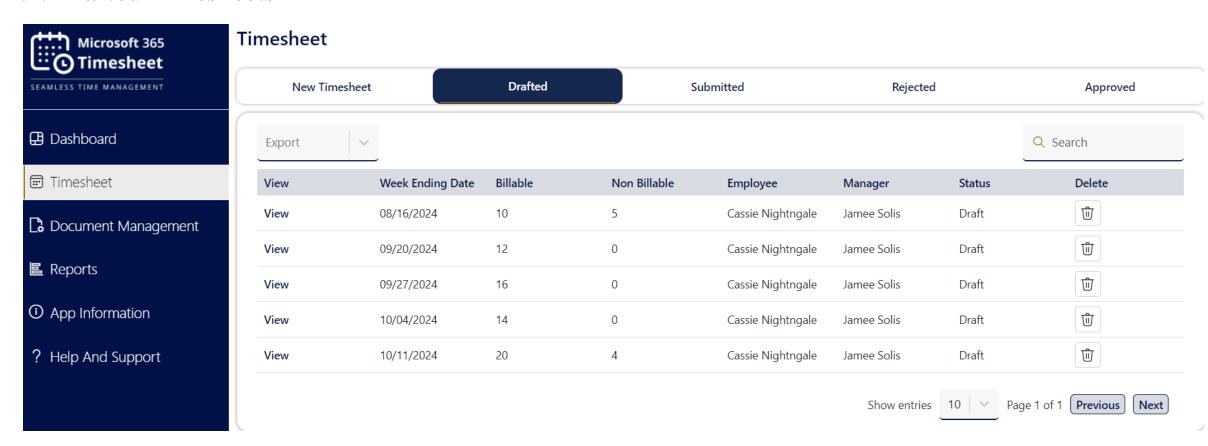
14.1. New Timesheet



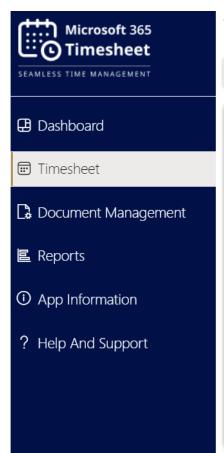
➤ View All Drafted, Submitted, Rejected, and Approved Timesheets:

- 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



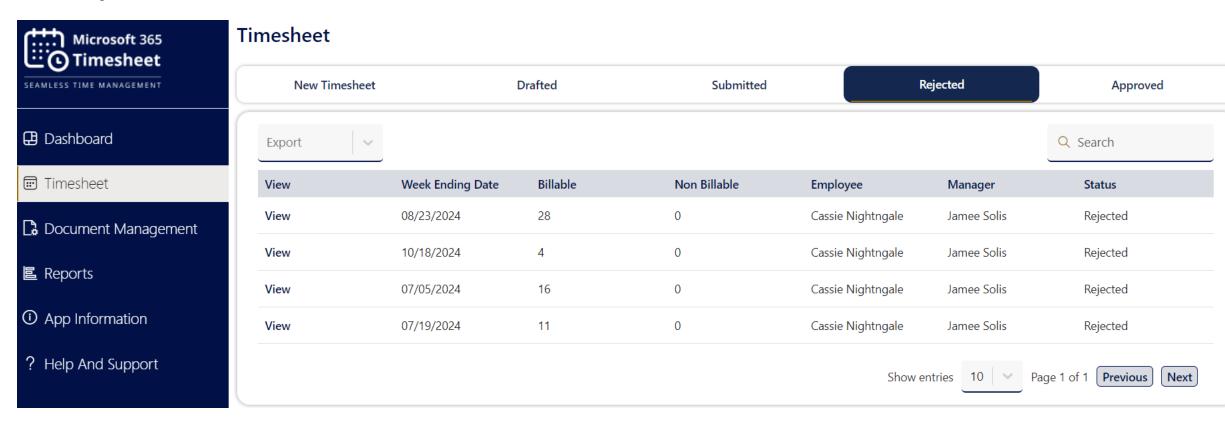
14.3. Submitted Timesheets



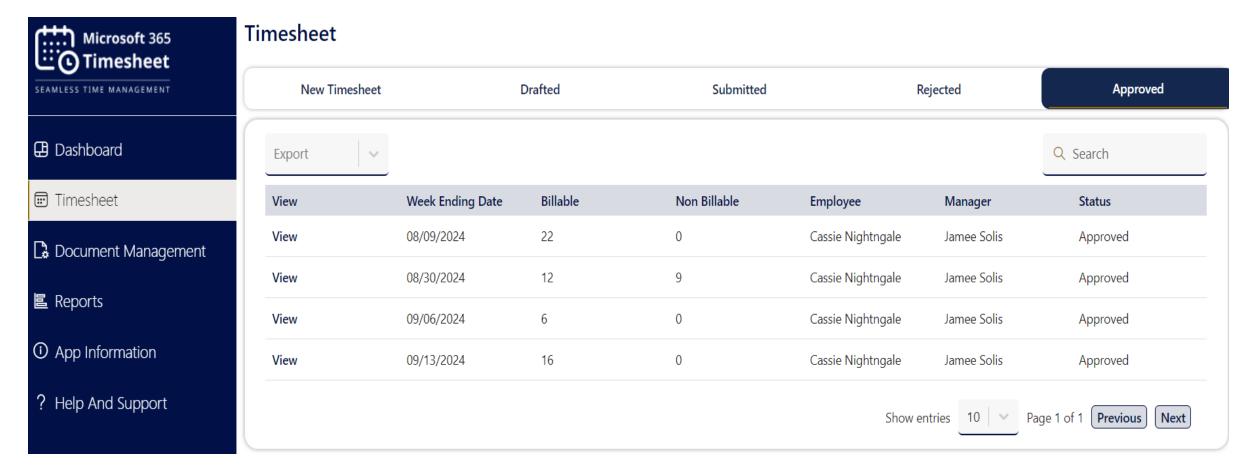
Timesheet



14.4. Rejected Timesheets



14.5. Approved Timesheets

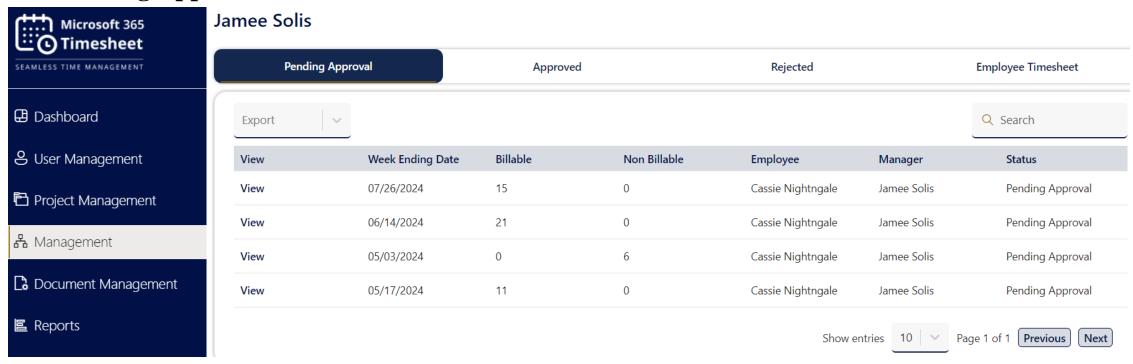


15. Management - Approval and Rejection of Timesheet

The management portal is used to view all the submitted employee timesheet and their current status. Management - Can see assigned employee-submitted timesheets.

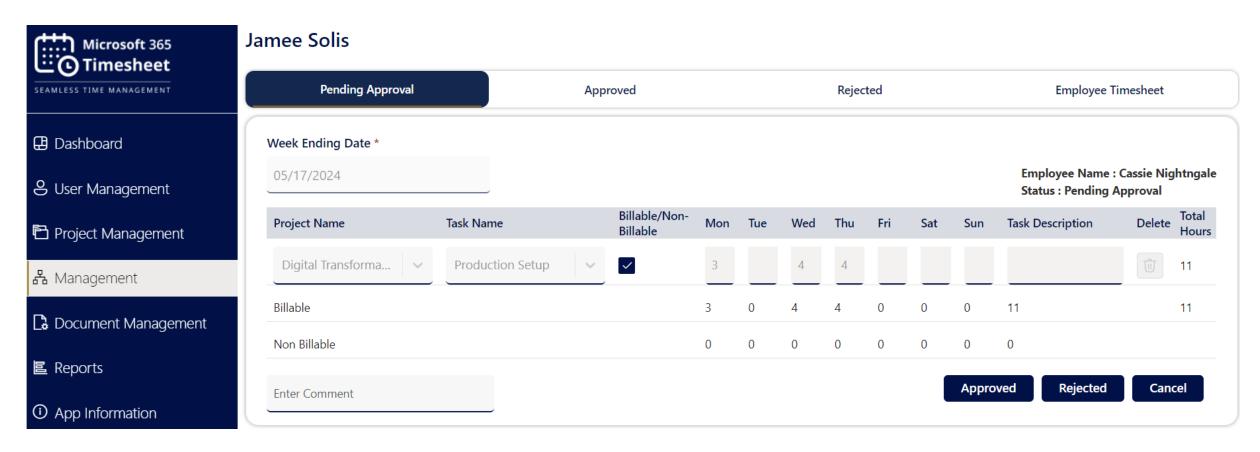
- 1. Pending Will show a pending timesheet which is pending approval.
- 2. Approved–Will show all the approved timesheets.
- 3. Rejected Will show all the rejected timesheets.
- 4. Employee Timesheet Will show all timesheet of employee

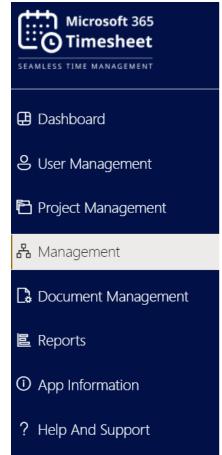
15.1. Pending Approval



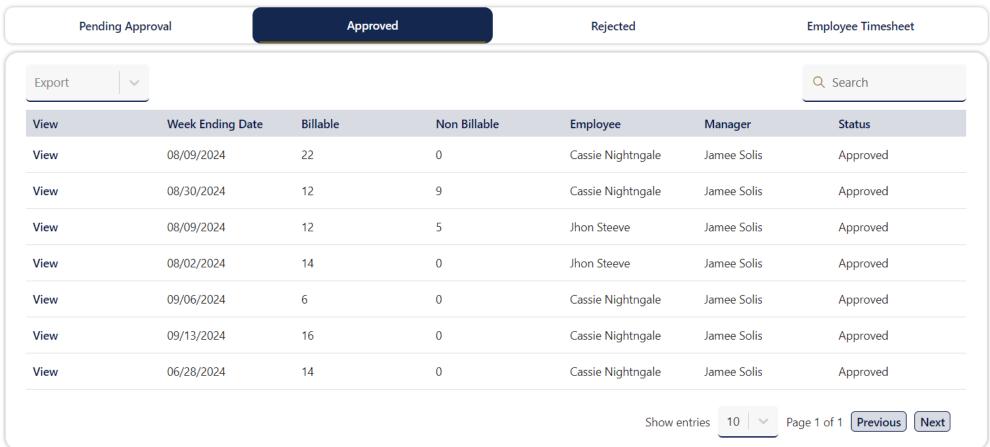
15.2. Approved Timesheets

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

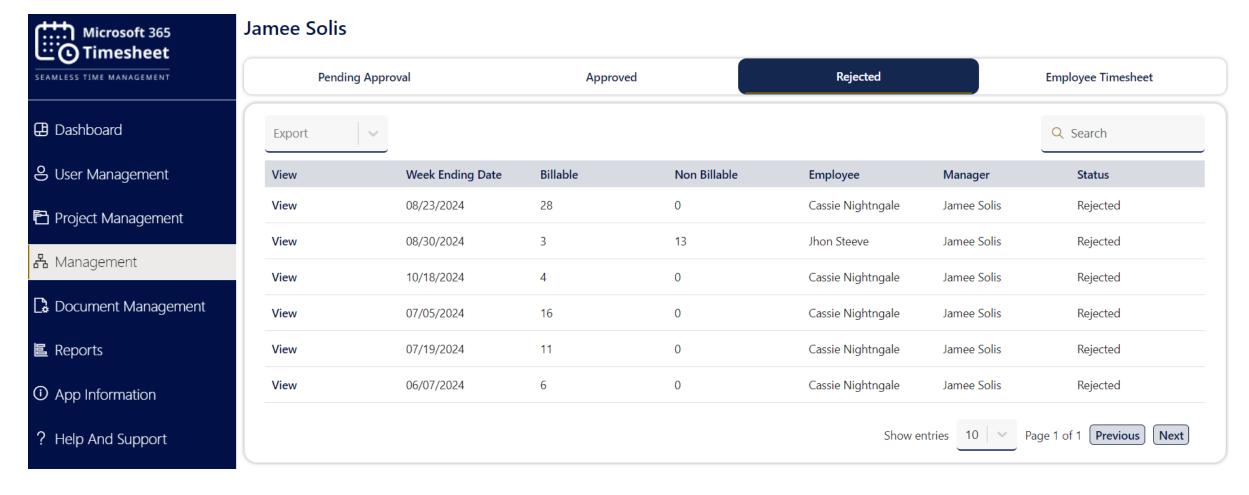




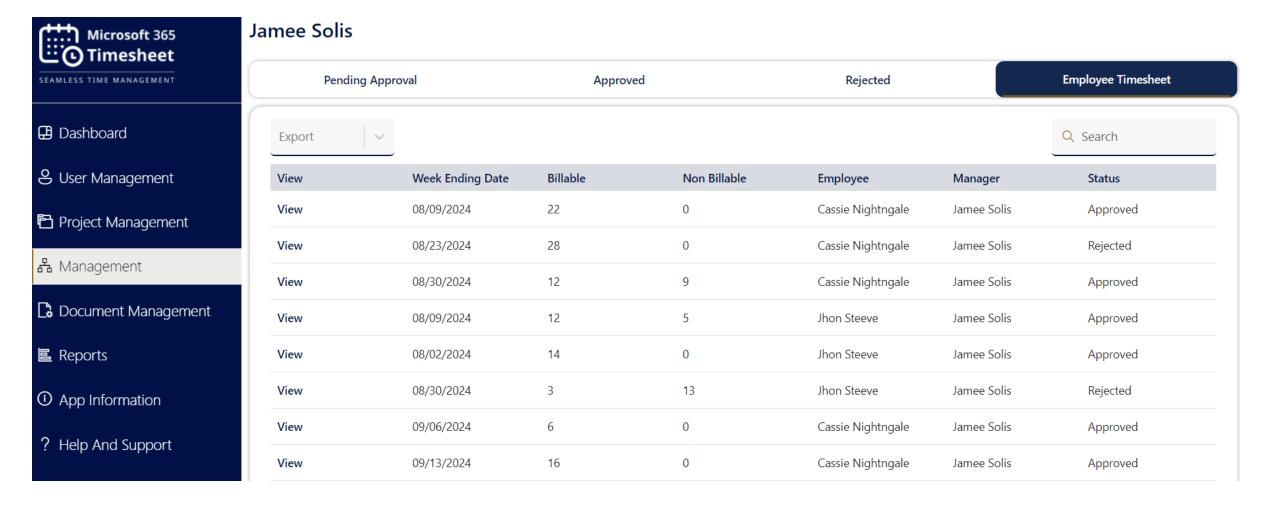
Jamee Solis



15.3. Rejected Timesheets

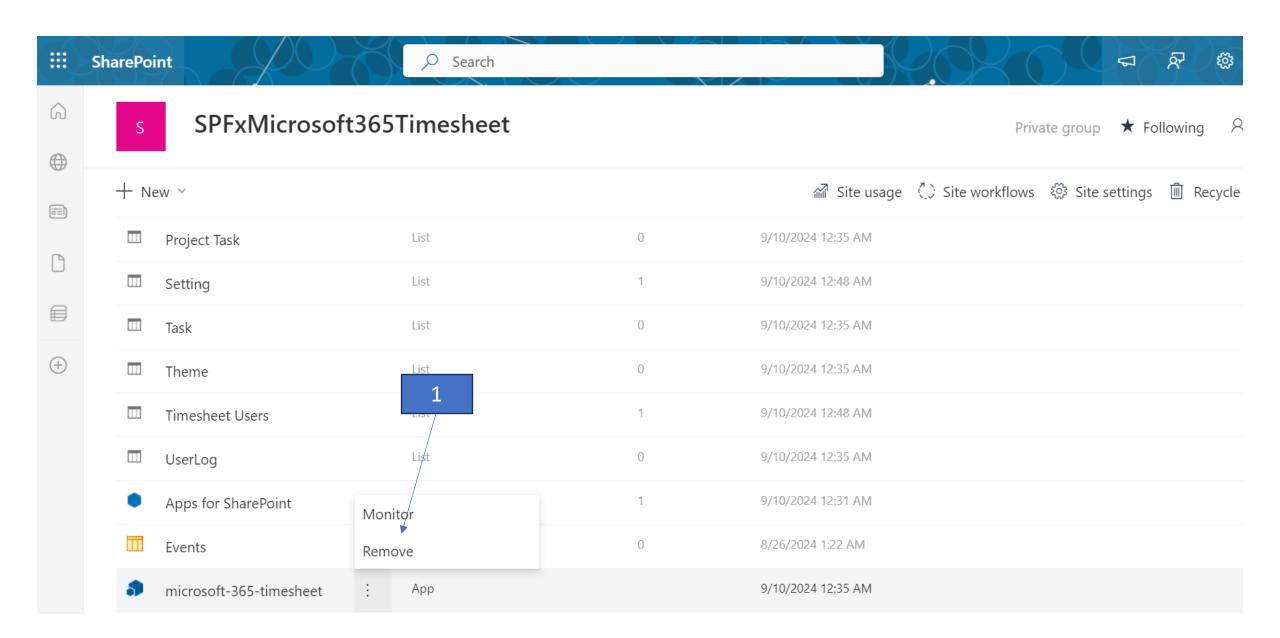


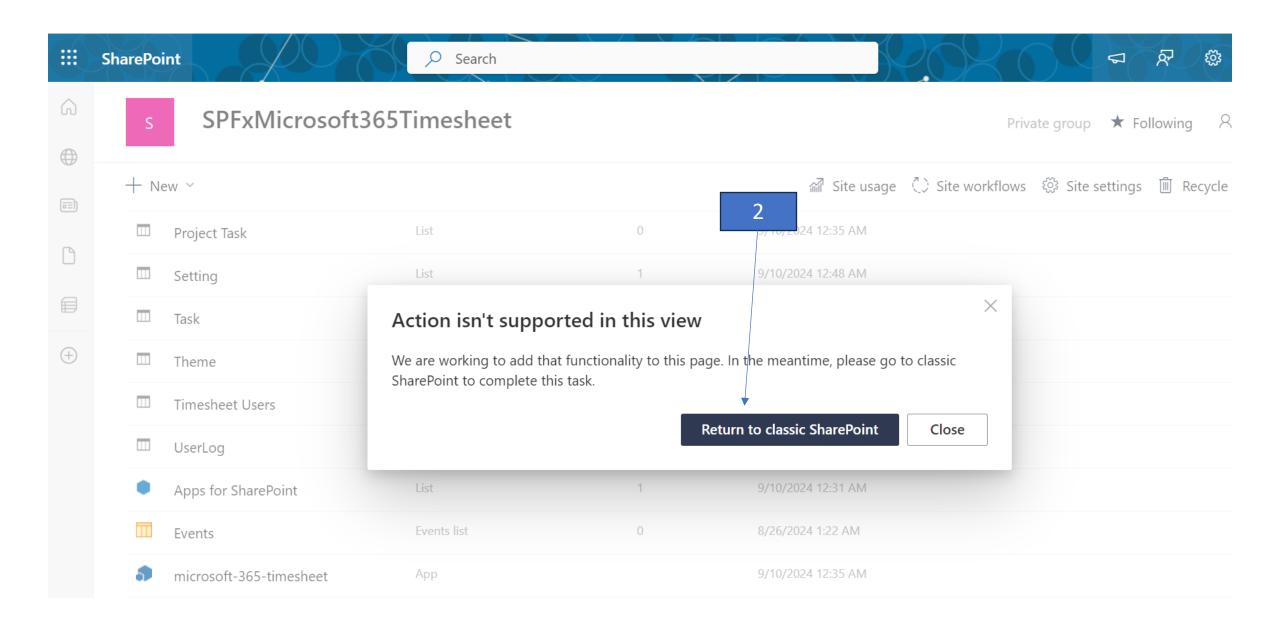
15.4. Employee Timesheets



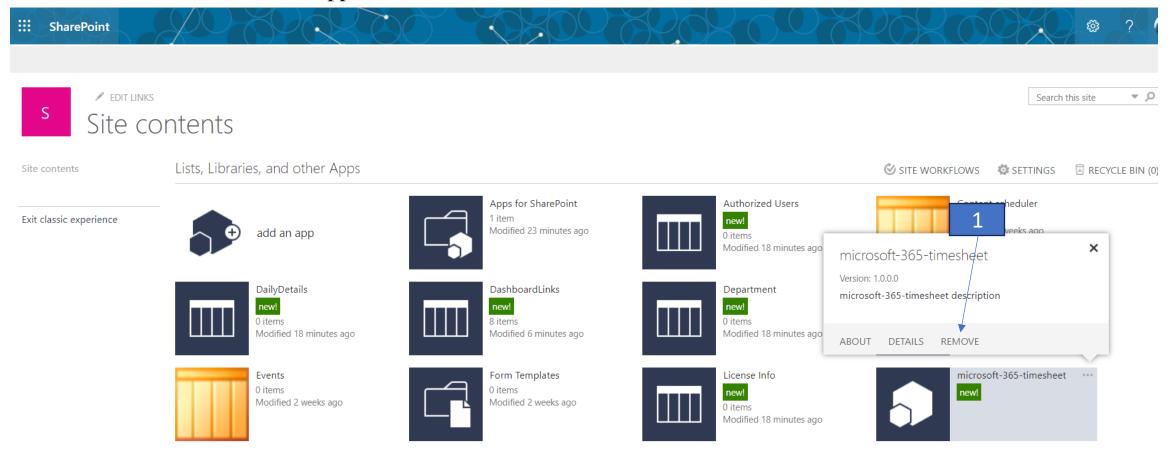
16. How to delete the application from the site?

- 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.





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





Thank You

For Your Attention