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-ins 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-ins 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-ins, resulting in increased returns on your technology investments.

2. **Technical Specification**

   - SharePoint on-premises.
   - Office 365.
   - Admin rights required to install the app.
• User should have the edit/contribute permission to use the app.
3. Latest upgrades and fixes

To offer maximum benefit out of the add-ins, we keep adding new features 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:** 3.11.0.0  
**Release date:** 14/08/2019

**Key features:**
- ✓ Added QR code to access mobile app.  
- ✓ Design fixes of paid version.

**Bugs rectified –**
- ✓ Fixes for project inactive values.  
- ✓ Design fixes of paid version.

4. Installing and configuring the add-ins

✓ Make sure that you are logged in to the Office 365 as an administrator. [Click here](#) to visit the Office 365 Timesheet add-ins page on Office Store.  
✓ On the add-ins 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-ins 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-ins

All the user accessing Office 365 Timesheet should have “Edit” and “Contribute” permissions. For giving permissions to users and groups 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”.  

✓ 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-ins 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-ins by clicking on it.
- Depending on the logged-in user, the add-in will open Manager, Employee or Guestportal.
- Logging in for the first time to the add-ins will always open the Administratorportal.

**Office 365 Timesheet**

**Welcome to Office 365 Timesheet add-in**

- Assign Roles
- Projects
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:

✓ There are major features that are provided to this user, such as:-
  o Administration – Can add new user role, user, project, tasks and view reports.
    ● User Management– Can assign admin/manager to created user and Can create a new user.
    (Note: - Administrator role should not be deleted as, if once deleted then application is left without any administrator role and cannot

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create new user roles. Because of this functionality of the app gets disturbed.)

- Project – Can create a new project.
- Project task – Can assign project to particular task.
- Report – Can view reports on worked task which are approved of all employees.
- Timesheet Settings – Can edit Email Setting, Benchmark Setting and Billable/Non-Billable Setting.
- Settings – Can edit week ending date, choose color theme, language, select another approver, edit mails.
- Grant Permission – Can grant permission to authorized users.
- Logs – Can maintain the logs which are performed by authorized users.
- Upgrade– Can Upgrade office 365 Timesheet Pro
- Upload Documents – Can upload new documents.
- 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:

- My Timesheet - Can check the status of his own timesheet.
  - New – Can view/edit the timesheets.
  - Drafted – Can view Drafts.
  - Submitted – Will show all the submitted timesheet.

- Reports - Can view reports on worked task which are approved of all employees.
  - Reports.

- Management - Can see his own Timesheet and create new time sheets.
  - Pending.
  - Approved.
  - Rejected
  - Employee Timesheet.

- Administration – Can add new user, project, tasks and view reports.
  - User Management – Can create a new user.
  - Project – Can create a new project.
  - Project Task – Can add new task in project.
  - Help – Will show the Guide of the site.
6.1.3 Manager Portal

Manager portal can be used to view all the submitted Timesheet with their current status. Mentioned below shows how to use the Manager Portal:
There are 3 major features that are provided to this user, such as:

- **Timesheet**– To check the timesheet status of employee.
  - Pending – Will show pending timesheet which are pending for approval.
  - Approved – Will show all the approved timesheet.
  - Rejected – Will show all the rejected timesheet.
  - Employee Timesheet – Will show all timesheet of employee

- **Report**– Can view reports on worked task.
  - Advance Report.

- **Administration** – Can add new user, project, tasks and view reports.
  - User Management – Can assign role to users and can create a new user.
  - Projects and Task settings – Can create a new project and can add new task in project.
  - Assign Project To Task – Can assign project to particular task
  - Setting – Can enable and disable the mobile App.
  - Document Library – Contains library of documents.
  - 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 2 major features that are provided to this user, such as:

- **Timesheet** - To check the timesheet status of an employee.
  - New – Can view/edit the timesheets.
  - Drafted – Can view Drafts.
  - Submitted – Will show all the submitted timesheet.

- **Reports** – Can add new tasks and view reports.
  - Project and Task Settings – can add new project and Can add new task in project.
  - Advance Reports – Can view reports on worked task.
  - Setting – Can enable and disable the mobile App.
  - Document Library – Contains library of documents.
  - 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 Management” option is present.
✓ Clicking on “Admin/Manager” create new user role form gets open.
# Office 365 Timesheet

## Administration

### User Management

**User Roles**

<table>
<thead>
<tr>
<th>Role</th>
<th>User Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td><a href="mailto:AtulKushwaha@ingnspl.onmicrosoft.com">AtulKushwaha@ingnspl.onmicrosoft.com</a></td>
</tr>
<tr>
<td>Manager</td>
<td><a href="mailto:RobertFirmino@ingnspl.onmicrosoft.com">RobertFirmino@ingnspl.onmicrosoft.com</a></td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries
✓ Select the Role
✓ Enter the user name field click on “Save”.
✓ The associated email id of the user will be auto fetched in the “User Email” table when saved.
✓ On user role page if there is only one Administrator then that Admin cannot be deleted until authority is not assigned to another administrator.
✓ Also, if manager is associated with any Employee then that Manager will not get deleted.

7.2 Add New User

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

- At dashboard under Administration “User Management” option is present.
- Clicking on “Employee” create new user form gets open.
Administrator/Manager/Manager’s - Manager can create a new user by:

- Enter employee name in Employee field.
- The associated email id of the employee will be auto fetched in the “Employee Email” text box.
- Select manager “Name” from the dropdown.
- The associated email id of the manager will be auto fetched in the “Manager Email” text box.
- Click on “Save” button to create new Employee user.
- If there is a single timesheet of the employee present in the application, then the employee will not get deleted.

The added record will appear on the same page in a tabular format under the 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 the edit button to edit the project name and active status.
✓ Users can also click on the 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 “Project Tasks” options present under “Administration” section or navigate via “Dashboard”.

![Office 365 Timesheet](image-url)
✓ Select the project from the dropdown.
✓ 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.
✓ 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 the save button.
✓ New task will be created and will 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” options present under “My Timesheet” section or navigate via Dashboard.

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✔️ 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.
✔️ On selection of project and task if there are many project tasks associated with project, so user can just enter the project and task name in the search box to get the project or task easily.
✓ 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 the 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 formats 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” 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 with the opened timesheet will be sent, that the timesheet is approved or rejected.
✓ Draft/Rejected/Pending for approval timesheet can be deleted from the 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 “Reports”.
✓ 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 formats such as Excel, CSV, PDF, MSword.

9. Paid Feature

As the add-ins is upgraded with new features some paid features are added into 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:

9.1 Upgrade
To get paid version you need to activate the license of the app. And to get that you need to navigate
on Upgrade page link present on the left navigation.

As you will get landed on upgrade page, you will see two buttons,
   1. I have an activation key
   2. Buy office 365 Timesheet Pro
Buy office 365 Timesheet Pro
To get the paid version, you must upgrade the free version to the paid version. And to get the paid version you must follow a few steps.

Click on “Buy office 365 Timesheet Pro” to get the Pro version activation license key. On clicking on this button the user will get directed to a page in a new tab where all the packages of the pro version will be displayed.

Here you can see 4 different options of app activation:

- **Download free**
  If users want to use the app for free, then you can directly click on the download free button to get the app for free.

- **Buy now**
  If you want to buy for a 1-year subscription, then click on the buy now button and you will get a new checkout page. Fill all the details in that page and the user will get an email with the activation key of the app.
  Simply follow the I have activation key steps to activate your app with the key.
• **Or try for 14 days**
If a user wants to activate just to see the pro version features for 14 days, we give an option with activation key that will give you the access of all the pro features for 14 days trial period. Click on the link, fill all the details of the form user will receive an activation key which can be used to activate the app features for 14 days for free.
I have an activation key

To get all the features of a paid app license key is required. If a license key is generated, then you need to activate the license using the option "I have an activation key" option. Below are the steps to activate the license follow the below steps.

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

![Office 365 Timesheet](image)
Enter the license key to activate the feature.
Click on the 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, users will be able to see some new links as “Settings” and “Timesheet setting”. etc.

All new features for the paid version are mentioned below.

1.10 Setting
2.10 Timesheet Setting
3.10 Project and Task Settings
4.10 Assign project to task
5.10 Grant Permission
6.10 Logs
7.10 Upload Document

9.2 Setting
On the settings page a 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, the setting page will be available only in Admin account.
✓ Set week ending date - Week ending date have two options for date selection.

  o 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.

  o Select date type - Here two options are given for date type, by selecting any of the types we want, we can change the type of the date in the entire application.

✓ Project/ Task Setting: -

  o This feature will help users to give an option in their organization for the employee whether to add tasks and assign tasks for the project or not.

  o 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”.

  o Click on save, once selection is done.

  o This will help admin to apply restrictions on employees to add tasks in the application and from there onwards only Manager and Admin will have authority to add Projects and tasks.
✓ Choose color theme: -
  o This feature will help the users to select various colors for the same application. Users can click on the Choose color theme tab and can select any color that one wants to keep for the entire organization.
  o Users can also select the desired font for the site organization.
  o This feature will only be available in administrator accounts.

✓ Mobile app Enable/Disable: -
  o This feature will help the users to ‘enable’ and to ‘disable’ the mobile App.
  o The Disable screen looks like this, given below

  o The enable screen looks like this, given below
9.3 Report
On report new search features are been added that will be helpful for the user to generate customized reports easily.

- All the features of 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 advanced report page in their existing accounts such as: Admin, Manager, Manager of managers, Employees and the old reports link will get replaced with the new one.
9.4 Project And Task Settings

A new feature has been added for paid version only known as Project and Task Settings. This feature will help all the users to import project and task from excel sheet in bulk amount in one click. The project and task setting page full access will only be given to Admin and Manager and employee can only create task and assign tasks to project.
On Project page user can create single project associated with its estimated hours, plus can also import project with estimated hours.

Once the license is activated, users can go on Project and Task Settings page and can see the “Import feature” with the radio button.

Select the “Import Project” radio button.
- The excel can be directly downloaded from the “i” icon present besides the text box.
- Just hover on “i” and click on click here the correct format excel can be downloaded, where projects can be added, and file can be uploaded here.
Here we must upload an excel file of (.xlsx) format where Projects and Estimated hours should be the heading and below the heading, we can list all the projects and hours we want to 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, Manager’s Manager and Employee.

But in Employee account only Task tab will be visible as employee is not having the authority to add project.

Here in employee account only new task can be added and imported by the employee.

If employees want to assign some tasks to already created project, then employee can also do it.
- Click on save the assigned task to the project will get saved.

- Same process can be done using admin and Managers account for assigning tasks to Projects tab.
9.5 Grant Permission
This feature is added in paid version for giving permission to other users to fill the timesheet and approve the timesheet if needed.

Here we can give authority to the employee role also to get login as manager and approve or reject its timesheet in his/her absence.

To grant permission for users follow below steps,

- Enter the username you want to give access to, in the “authorized User” textbox
- Select the user you want to access the account off, from App user list.
- Click on the save button and user will get access to the selected user account.
- All the added user permission can also be made inactive, and once the user is made inactive then that user will no longer be able to access the granted user account.

9.6 Logs
This page is added in the paid version for giving information regarding the changes done by the logged in users which are given the authority to Login as a different user and perform the activity in the person's absence.
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Reports
- Advance Reports

Administration
- User Management
- Project and Task Settings
- Assign Project To Task
- Settings
- Timesheet Settings
- Grant Permission

Logs
- No record found.

Logs
- Upgrade
- Upload Document
- Help
Here all the details and activities of the employee, manager or any other user that logs into the user's account will be logged. Activities such as creating new timesheet, approval or rejection of the timesheet, adding new user in the organization etc.

In the below image we can see that the employee is logged in as manager into his manager’s account.
Here employee is approving the timesheet sent to manager for approval.

In the below image we can see the timesheet is getting approved from employee login as manager and all the activity which an employee has performed in the manager account is logged on the log page.

Below we can see all the logs generated by the logged in user.
9.7 Upload Document

A new link is added to upload any documents on the site if you want all the users in the application should see.

In the image below you can see an upload document link in the left navigation of Admin account. This link is only accessible by an administrator, that means admin can only add the documents and all the other users can only view the added documents.

9.8 Timesheet Setting

A new navigation called Timesheet settings page, helps us to edit the timesheet for employees of the entire applications and users who are using the application.

Major three options are added that can be edited according to organizations need.
● **Email Settings:**
Here in email setting a new option is added that is whether the admin wants time timesheet to get approved directly or want manager to approve first.
Also, now you have an option to send an email for timesheet approval or send an email when it’s directly approved to manager.

● **Benchmark Settings:**
Here in benchmark setting admin is having an option to set a benchmark on daily hours. Such as if admin adds 10 as a benchmark then employee cannot enter more than 10 hours a day in their timesheet, it will through a validation as 10 hours gets exceeded.
**Billable/ Non-Billable Settings:**
Here in billable/ non billable tab option is given to users that whether organization need billable checkbox in the timesheet or not.
If “Hide Billable” option is selected, then the check box will get vanished from the timesheet.
9.9 User Role and User import

As there are manager organizations where data of user and their role is present in an excel so now Timesheet have given you the facility to import all the user role and the users in the timesheet on just one click go.

- **User role**

  On User Management page a new option has been added to import all the user role from excel in the application, from just uploading the excel with the user role data into the application.

Here in the below image you can see an option named “Import manager”.

So to import manager you have to follow few steps such as:

- Create an excel with the given format, which you can get from the “I” icon present beside the upload field.
- Click on “click here” link format will be downloaded.
- Create the user role excel in the same format shown below.

<table>
<thead>
<tr>
<th>Manager</th>
<th>ManagerEmail</th>
<th>SuperManagerYal</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td><a href="mailto:ABC@onmicrosoft.com">ABC@onmicrosoft.com</a></td>
<td>FALSE</td>
</tr>
<tr>
<td>XYZ</td>
<td><a href="mailto:XYZ@onmicrosoft.com">XYZ@onmicrosoft.com</a></td>
<td>TRUE</td>
</tr>
</tbody>
</table>

- Once the excel is created, select the file from choose file button and click on the “Import” button.
- All the data will get imported on User Role page automatically.

- **Users**
  On user management page a new option has been added to import all the user from excel in the application, from just uploading the excel with the user data into the application.

Here in the below image you can see an option named “Import Employee Manager”.

![User Roles](image.png)
So to import Employee Manager you have to follow few steps such as:

- Create an excel with the given format, which you can get from the “I” icon present beside the upload field.

- Click on “click here” link format will be downloaded.
- Create the user excel in the same format shown below.

- Once the excel is created, select the file from choose file button and click on the “Import” button.
- All the data will get imported on User page automatically.

8.10 Logs enable/Disable

This feature will help the users to ‘enable’ and to ‘disable’ the Logs.
10. **How to delete the add-ins 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 content
 ✓ Click on Classic SharePoint link to switch the site in classic mode. (For SharePoint Online users)
10. How to update the add-ins?


11. How to add mobile application