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Timesheet Pro 365 – User Guide

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Version 1.6 Updated: 06/19/2026

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Introduction

The **Timesheet Pro 365 User Guide** provides a comprehensive overview of how to install, configure, and use the application within the Microsoft 365 and SharePoint environments.

This guide is designed for **administrators**, **managers**, and **employees** to help streamline Timesheet management, improve project workflows, and enhance overall productivity.

Inside, you will find:

- Step-by-step installation and configuration instructions
- Detailed guidance on application settings and features
- Best practices for navigating and utilizing core functionalities.

Whether you are responsible for **system setup**, **approving submissions**, or **recording work hours**, this guide will enable you to maximize the value of Timesheet Pro 365 and ensure seamless integration across your organization.

By following the outlined steps, you can achieve efficient deployment, consistent time tracking, and improved project management.

Version History

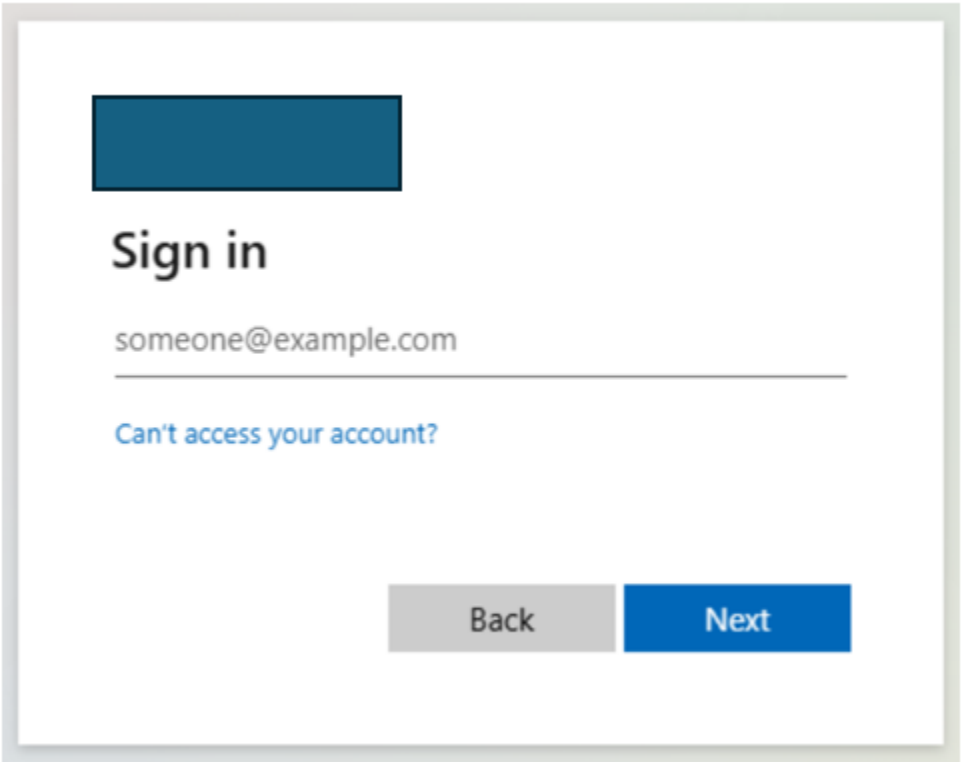
Version #	Date	Highlights
1.0	10/18/2024	This release includes the same features and functionalities as the old Office 365 Timesheet application.
1.1	02/20/2025	**Copy from Previous Timesheet:** Added a new **Copy to Previous Timesheet** feature, allowing users to easily copy data from a previous timesheet into a new one, improving efficiency in timesheet management.
1.2	01/13/2025	**Daily Timesheet Report:** Introduced a new report that provides a detailed daily breakdown of employee work hours, enabling better tracking and productivity analysis for admins and managers. **Minimum Daily Hours:** Added a configuration to enforce minimum daily work hours, ensuring policy compliance and alerting employees when their logged hours fall below the required threshold. **Employee/Manager Dashboard Update:** Added **Next** and **Previous** buttons to the right side of the bar graph, enabling seamless navigation between past and upcoming timesheets for easier access to historical data and future schedules.
1.3	01/13/2025	**Missing Report:** Introduced a feature for admins and managers to track missing timesheets, ensuring timely identification of submission gaps and better oversight of employee activities.
1.4	05/20/2025	**Email Notification for Missing Weekly Timesheets:** Admins and Managers can now send automated email reminders for missing timesheets from the past 3 months. Admins can notify Managers about their team's missing entries, while Managers can directly notify employees, helping ensure timely timesheet submissions. **Weekend Time Entry Settings:** A new option under Timesheet Settings allows admins to enable or disable time tracking on specific weekend days. Selected days become unavailable for entry in the New Timesheet module, providing organizations with improved control over weekend timesheet policies. **Holiday Calendar in General Settings:** A new "Holiday Calendar" tab has been added under General Settings. Admins can add, edit, and delete

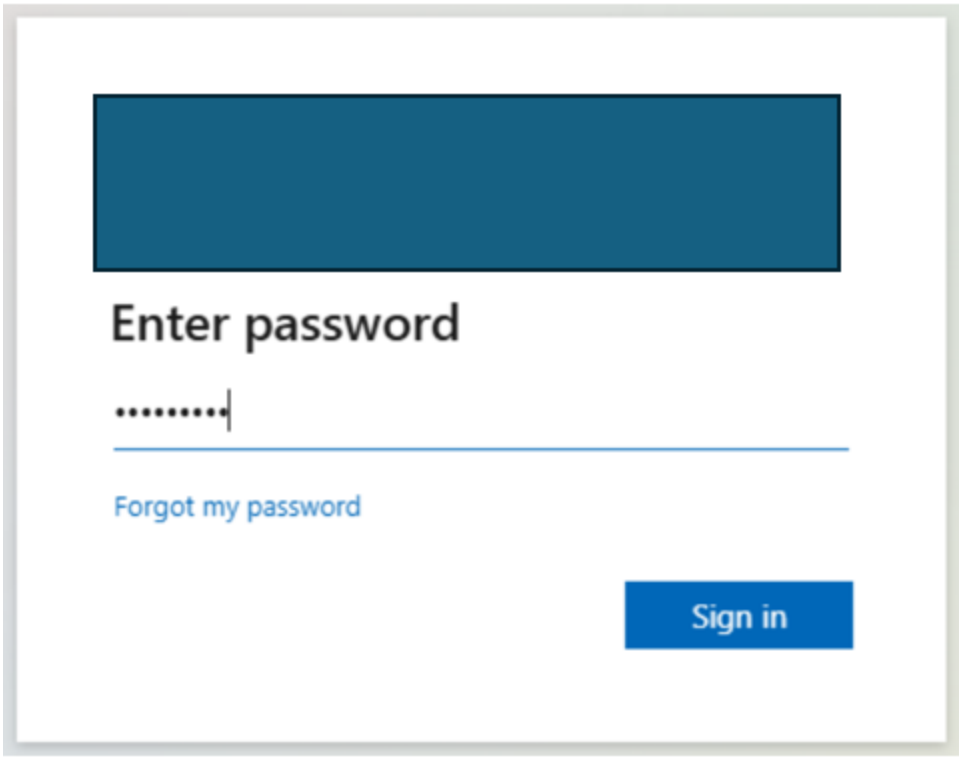
		holidays via a form linked to a SharePoint list. Holidays are shown in a Data Table and appear as tooltips on the Timesheet page to alert users when a selected date is a holiday. **User Management Access:** A toggle that controls managers' permissions in User Management. When disabled, managers can modify access for any admin or manager, posing security risks. When enabled, managers can only manage employees assigned to them, improving security. Managers can still add new employees regardless of the toggle setting. **Bulk Delete:** A new feature allows selecting and deleting multiple records at once with a confirmation prompt for safety. This is implemented in Employee Management, Project Management, Permission Reports, and Timesheet modules.
1.5	08/06/2025	**Employee Project Relation:** We have introduced a new feature to manage and define relationships between employees and projects for enhanced control and security. With this update: **Role-Based Access:** Employees can now view and interact only with projects assigned to them, ensuring data relevance and confidentiality. **Admin Controls:** Administrators can enable this feature from **Settings > General Settings > Management Settings**. **Project Assignment:** A new **Employee Project Relation** menu allows admins and managers to easily assign projects to specific employees.
1.6	06/19/2026	**Employee Project Association:** We have introduced Active/Inactive Status for Employee Project relation that can be changed later. **Project Task Assignment**: We have introduced Active/Inactive Status for Project Task assignment that can be changed later. **Project Report:** Admin & Managers can now select a particular project and generate hour-based report for selected project. **Employee Reports:** An additional filter "Department" is added while generate employee project-based report.

Login to Microsoft 365 or SharePoint

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

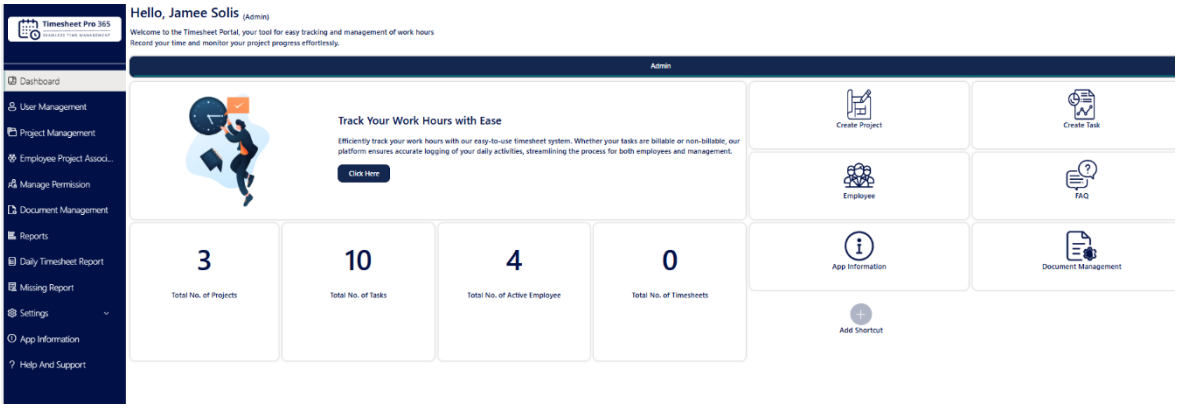
2. Ensure that the user is logged into the Microsoft 365 environment with their credentials.





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

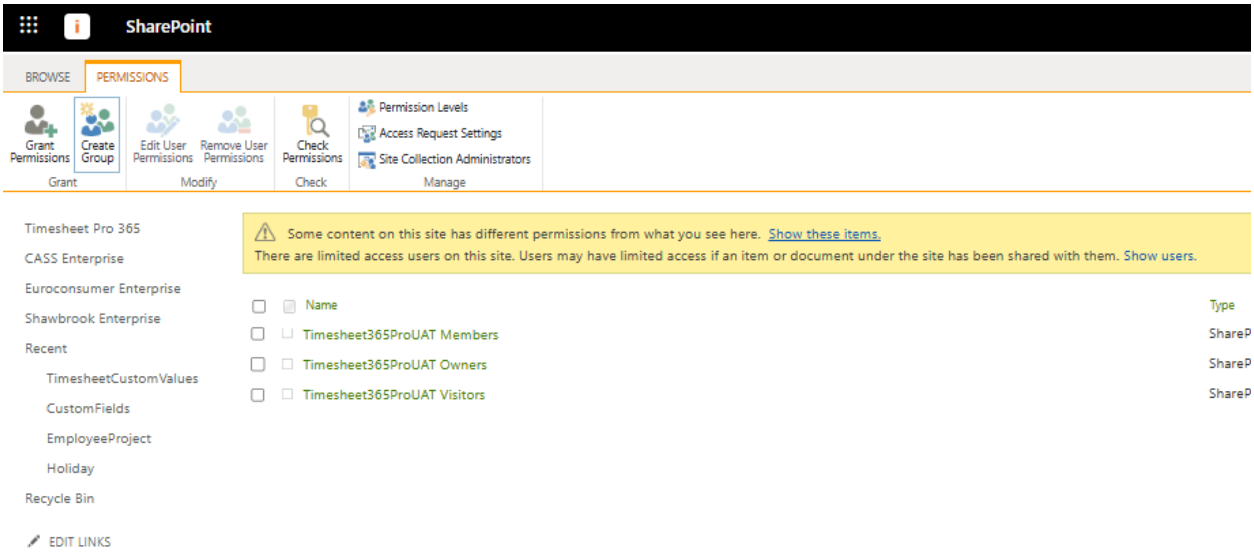
4. Open your SharePoint site where you have installed the Timesheet Pro 365 application.

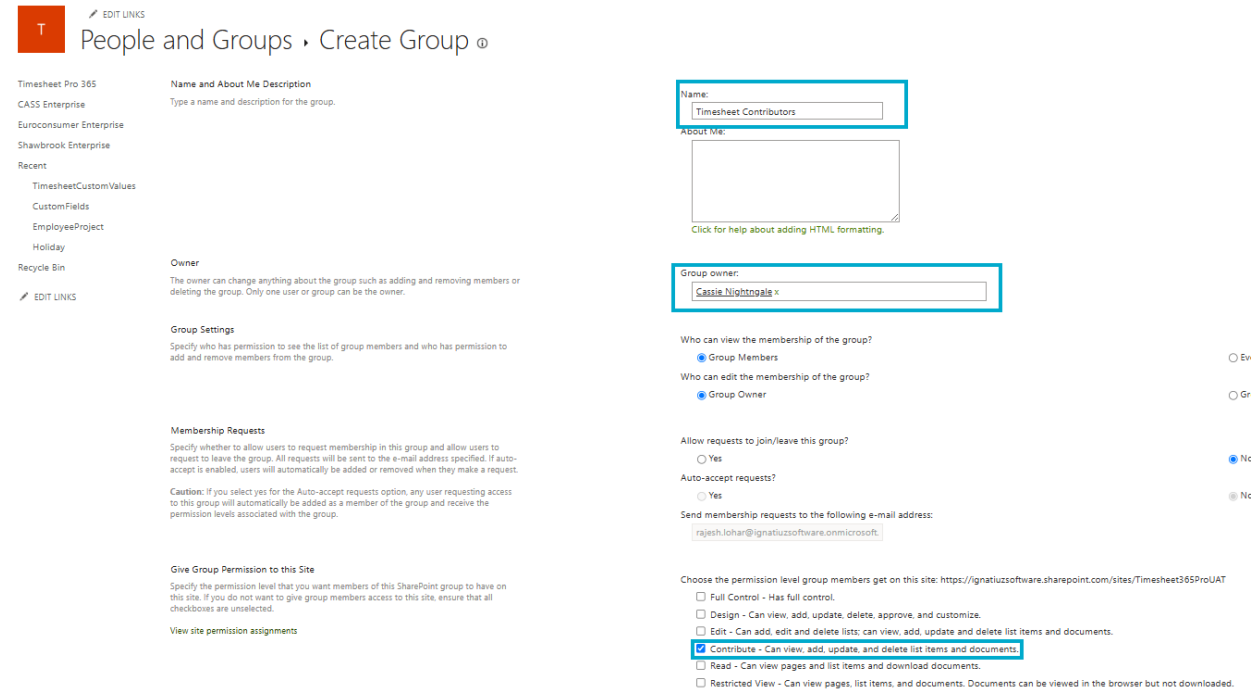


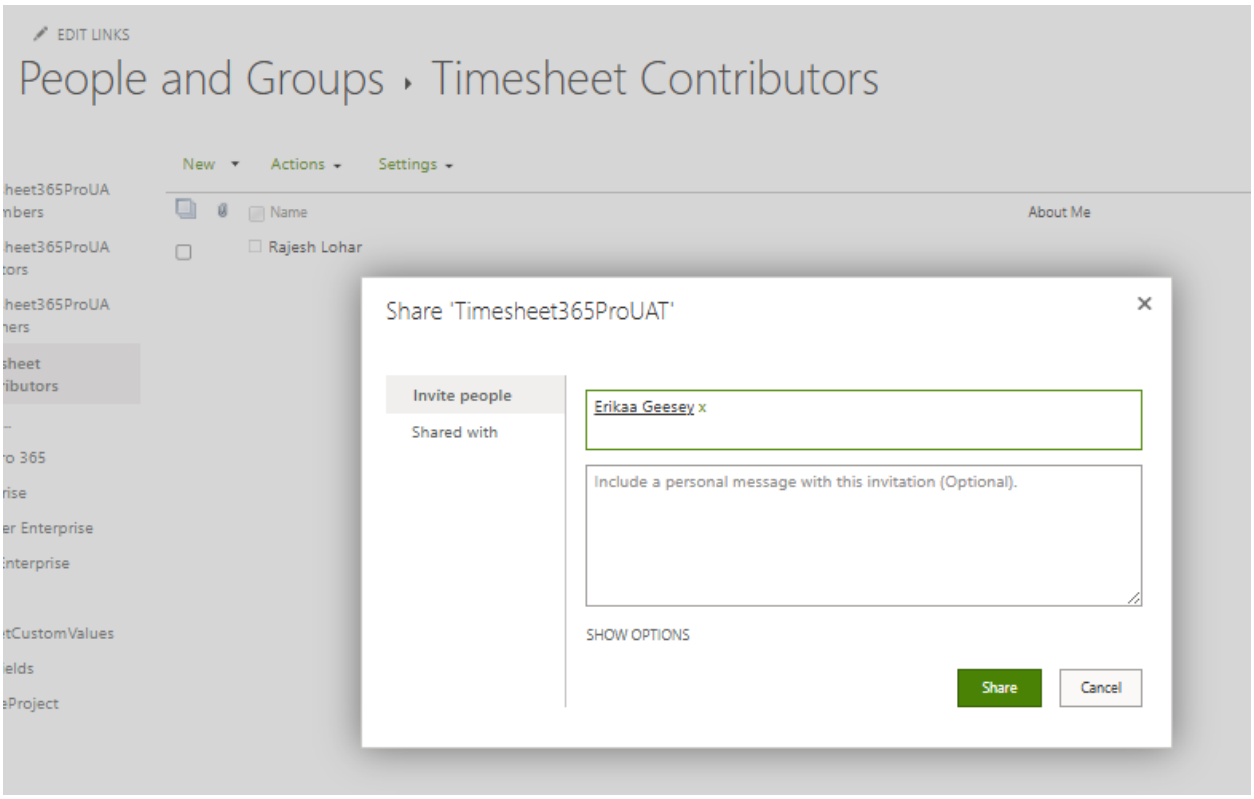
User Permissions for Site Access

All users accessing **Timesheet Pro 365** must have **Contribute** permissions. To grant these permissions to users or groups, follow the steps below:

1. Click the **Settings** icon in the top-right corner of the SharePoint site. A right sidebar will open.
2. In the sidebar, select **Site Permissions**.
3. Click Create Group to create new group
4. Add Group Name, Group Owner and select tick for Contribute permission.
5. Click **New** to add users.
6. Enter the email addresses of the users or groups you want to grant access to.
7. Click **Share** or **Add** to confirm.


SharePoint
BROWSE
PERMISSIONS
Grant Permissions
Create Group
Edit User Permissions
Remove User Permissions
Check Permissions
Permission Levels
Access Request Settings
Site Collection Administrators
Grant
Modify
Check
Manage
Timesheet Pro 365
CASS Enterprise
Euroconsumer Enterprise
Shawbrook Enterprise
Recent
TimesheetCustomValues
CustomFields
EmployeeProject
Holiday
Recycle Bin
EDIT LINKS
Some content on this site has different permissions from what you see here. Show these items.
There are limited access users on this site. Users may have limited access if an item or document under the site has been shared with them. Show users.
Name
Type
Timesheet365ProUAT Members
Timesheet365ProUAT Owners
Timesheet365ProUAT Visitors

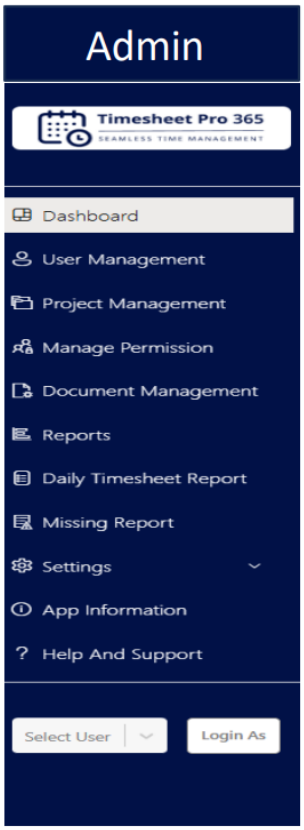

EDIT LINKS
People and Groups › Create Group
Name and About Me Description
Type a name and description for the group.
Name:
Timesheet Contributors
About Me:
Click for help about adding HTML formatting.
Owner
The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.
Group owner:
Cassie Nightngale
Group Settings
Specify who has permission to see the list of group members and who has permission to add and remove members from the group.
Who can view the membership of the group?
Group Members
Who can edit the membership of the group?
Group Owner
Membership Requests
Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.
Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.
Allow requests to join/leave this group?
Yes
Auto-accept requests?
Yes
Send membership requests to the following e-mail address:
rajesh.lohar@ignatiuzsoftware.onmicrosoft.
Give Group Permission to this Site
Specify the permission level that you want members of this SharePoint group to have on this site. If you do not want to give group members access to this site, ensure that all checkboxes are unselected.
View site permission assignments
Choose the permission level group members get on this site: https://ignatiuzsoftware.sharepoint.com/sites/Timesheet365ProUAT
Full Control - Has full control.
Design - Can view, add, update, delete, approve, and customize.
Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.
Contribute - Can view, add, update, and delete list items and documents.
Read - Can view pages and list items and download documents.
Restricted View - Can view pages, list items, and documents. Documents can be viewed in the browser but not downloaded.

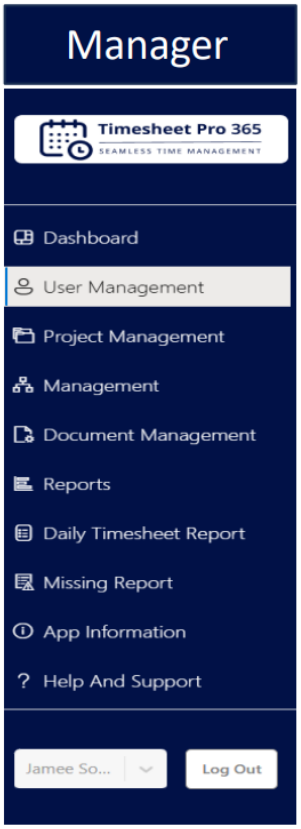

EDIT LINKS
People and Groups ▸ Timesheet Contributors
New
Actions
Settings
Name
About Me
Rajesh Lohar
Share 'Timesheet365ProUAT'
Invite people
Shared with
Erikaa Geesey x
Include a personal message with this invitation (Optional).
SHOW OPTIONS
Share
Cancel

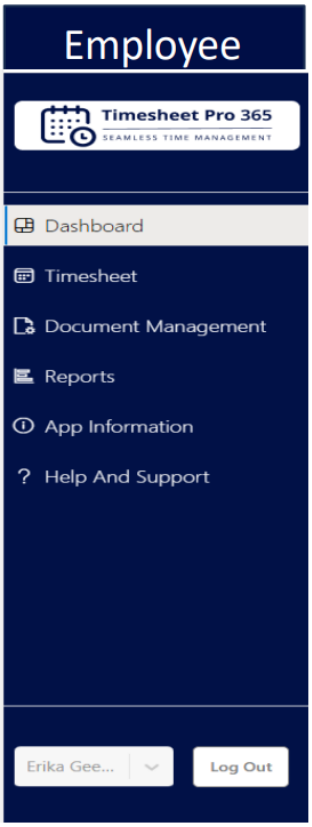
Role Based Navigation Bar

Overview

The **Role-Based Navigation Bar** in **Timesheet Pro 365** allows users to access different sections and functionalities depending on their assigned role.







Admin Navigation Bar

The **admin** role has the most comprehensive access and can manage all aspects of Timesheet Pro 365. Below are the sections available in the **admin** navigation bar:

- **Dashboard**: The main page where Admins can view overall system statistics and user activities.
- **User Management**: Allows Admins to manage user roles, permissions, and create new users.
- **Project Management**: Create, manage, and assign projects and tasks.
- **Manage Permission**: Control user access levels and permissions within the application.
- **Document Management**: Upload, organize, and manage documents within the application.
- **Reports**: Access timesheet reports
- **Daily Timesheet Report**: View detailed timesheet data for specific employees on a daily basis.
- **Missing Report**: A report that highlights employees who have missed timesheet submissions.
- **Settings**: Manage application-wide settings like email setting, week-ending dates, etc.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

Manager Navigation Bar

The **Manager** role is slightly more limited than the admin role but still has access to many important features, such as managing timesheets and viewing key reports. Below are the sections available in the **Manager** navigation bar:

- **Dashboard**: The main page where Managers can view overall system statistics and user activities.
- **User Management**: Allow managers to manage user roles and permissions and create new users.
- **Project Management**: Create and manage tasks and assign them to employees.
- **Document Management**: Only view documents which was uploaded by Admin.
- **Reports**: Access timesheet reports

- **Daily Timesheet Report**: View timesheet data on a daily basis for employees.
- **Missing Report**: View and manage employees' missing timesheet submissions.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

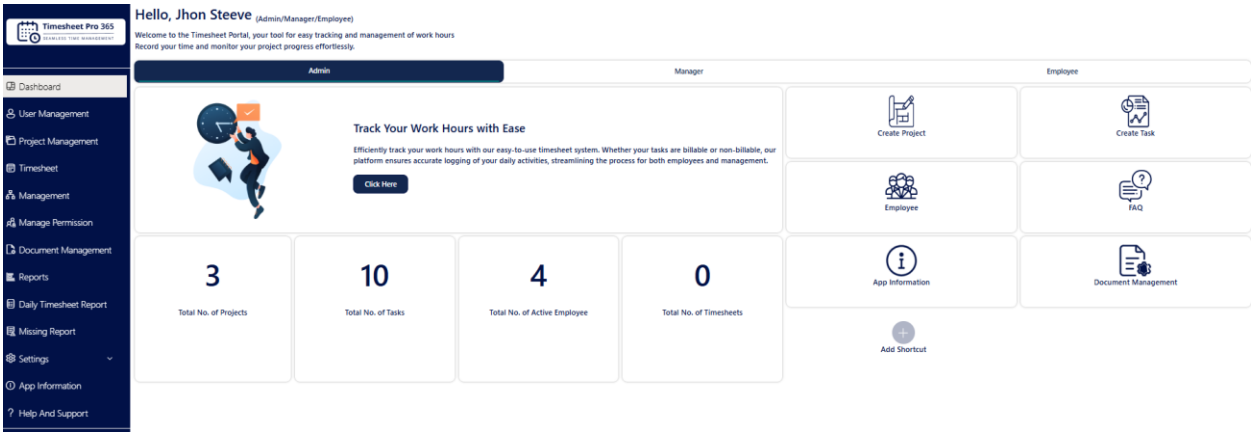
Employee Navigation Bar

The **Employee** role has the least access, with functionalities focused mainly on submitting and viewing timesheets. The available sections in the **Employee** navigation bar are:

- **Dashboard**: A quick overview of the employee's current timesheet data and performance.
- **Timesheet**: Submit, view, and manage personal timesheets.
- **Document Management**: Access documents uploaded by the admin.
- **Reports**: View personal timesheet reports.
- **App Information**: Provides details about the application version and updates.
- **Help and Support**: Access help documentation and support resources.

Handling Role Combinations

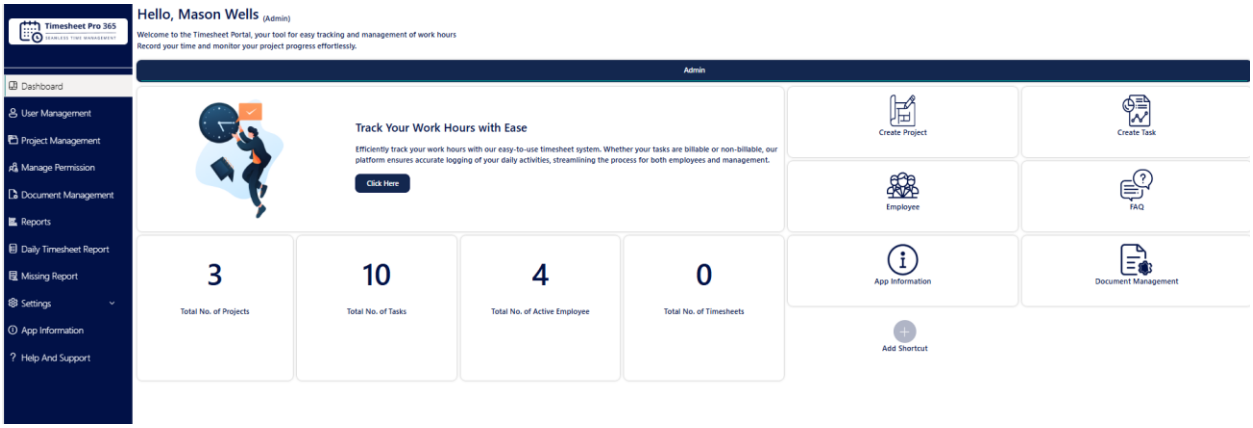
1. Set up the system to manage different role combinations, such as Admin/Manager/Employee, Admin/Manager, Admin/Employee, and Manager/Employee.



2. Ensure that users with multiple roles can access the correct features and navigation tabs based on their roles.

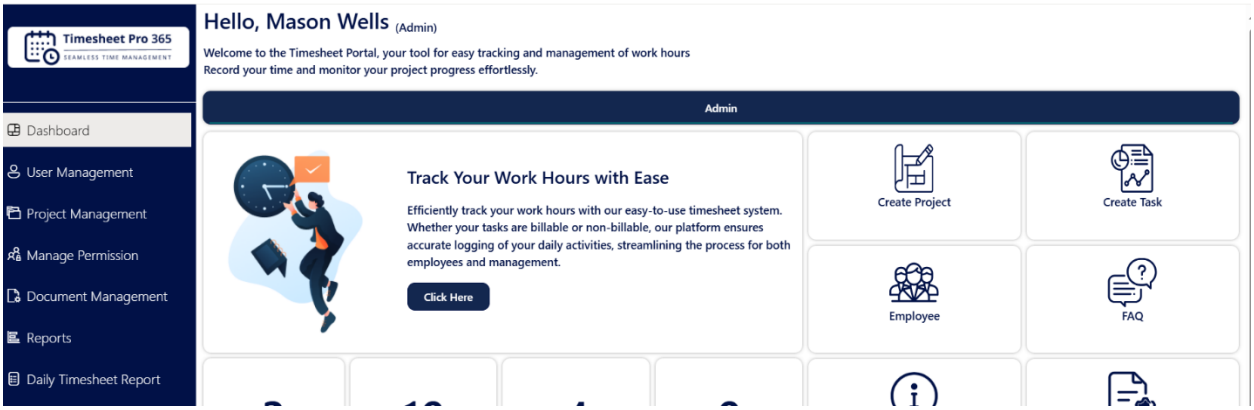
Dashboard

Admin Dashboard



Default Administrator Role

1. Initial installer becomes Timesheet Administrator, with full control over creating admins, managers, employees, and projects.
2. Display current user's name and role prominently upon login for clear identification.
3. Customize navigation tabs based on the user's role, showing the admin tab for administrators.
4. **Click Here** button that links to the Ignatiuz official site for more service

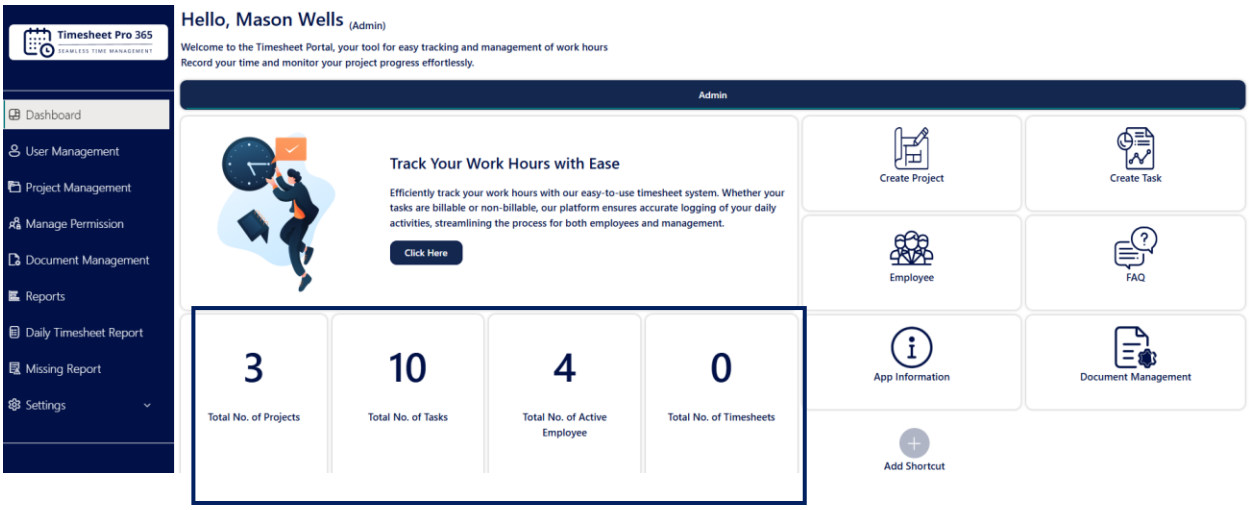


Cards

The **Dashboard Cards** provide a quick overview of key metrics within the Timesheet system. These cards help users monitor project and employee activity at a glance.

1. **Total Number of Projects:** The total count of projects created in the timesheet.

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



Add Shortcut

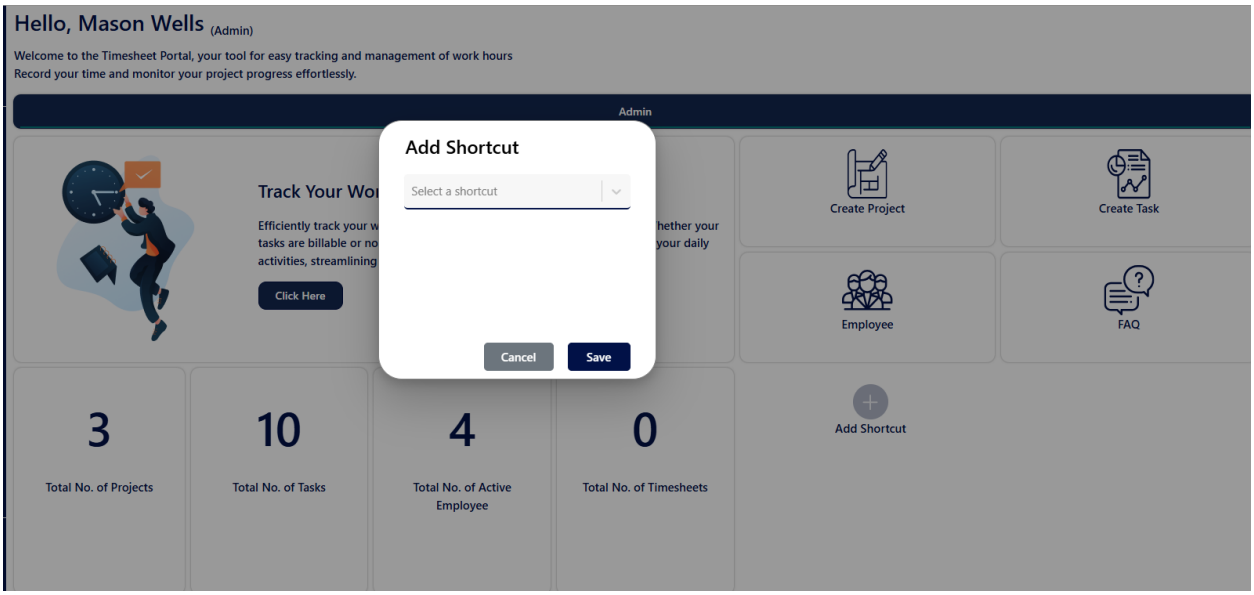
To enhance dashboard customization for administrators, we've introduced a new feature: Add Shortcut.

By default, the dashboard displays four cards: **Create Project**, **Create Task**, **Employee**, and **FAQ**. Each card allows you to navigate quickly to its respective tab.

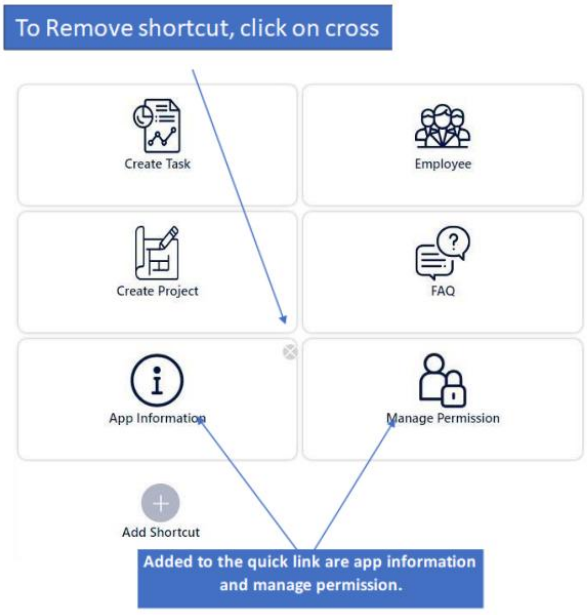
The Add Shortcut feature enables administrators to personalize their dashboard by adding additional cards for quick access to frequently used sections, streamlining daily workflows.

How to Use the Add Shortcut Feature:

1. Click the **"Add Shortcut"** button located at the bottom of the dashboard.
2. From the drop-down menu, select the desired quick link.
3. Click **"Save"** to confirm your selection.
4. The selected shortcut will now appear as a new card on your dashboard, allowing for easier and faster navigation.

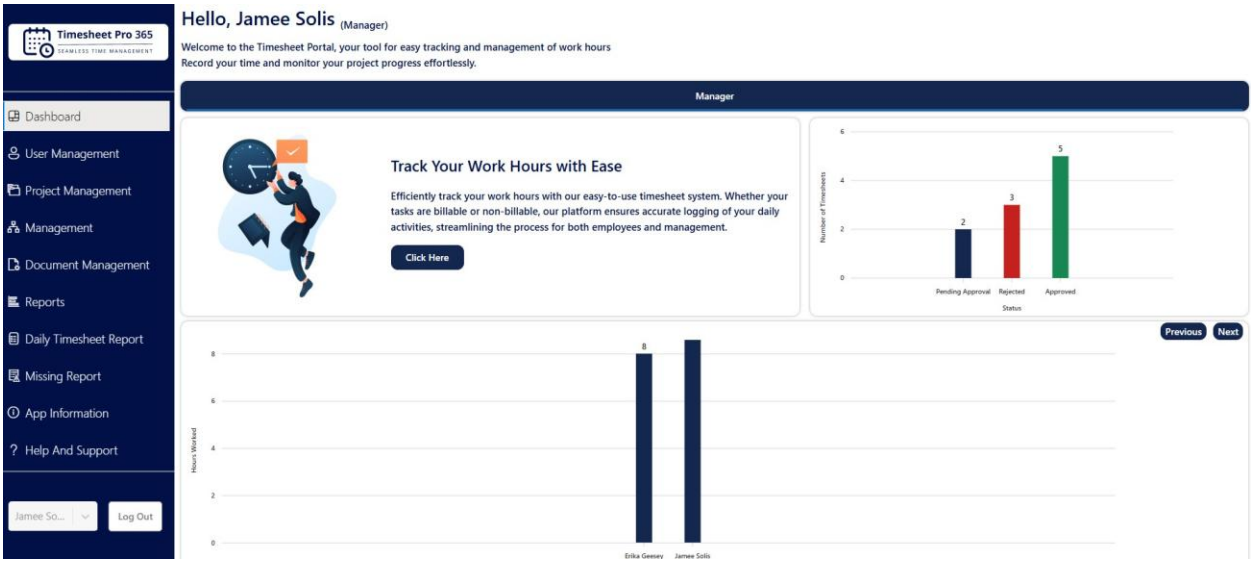


Removing a Shortcut: If you no longer need a shortcut, click on the **cross (x)** on the shortcut card to remove it from the dashboard.



Manager Dashboard

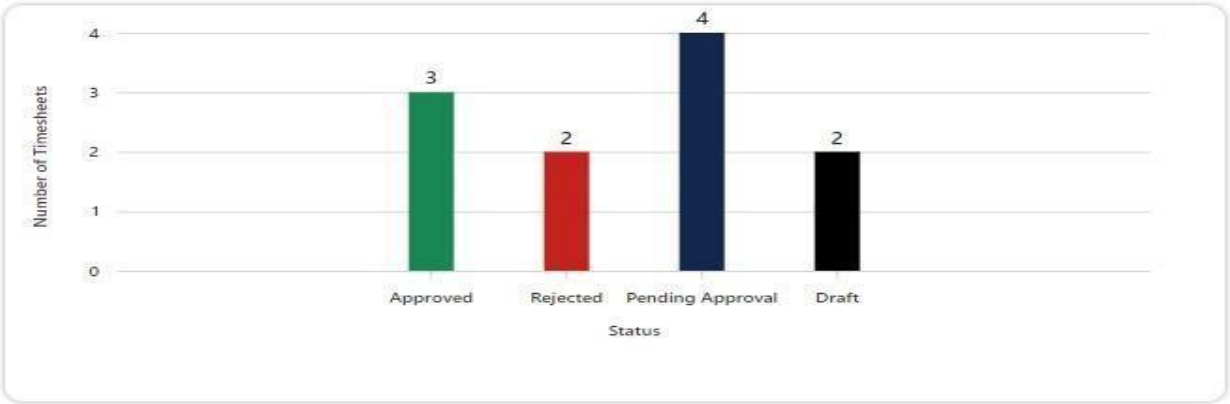
The **Manager Dashboard** provides a consolidated view of timesheet activities, employee work hours, and the manager's role information.



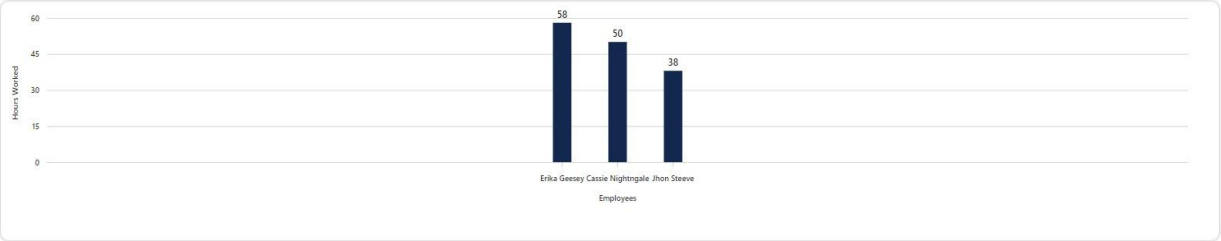
It includes the following key components:

1. Timesheet Status Bar Graph
2. Hours Worked bar Graph
3. User Identification and Role Display

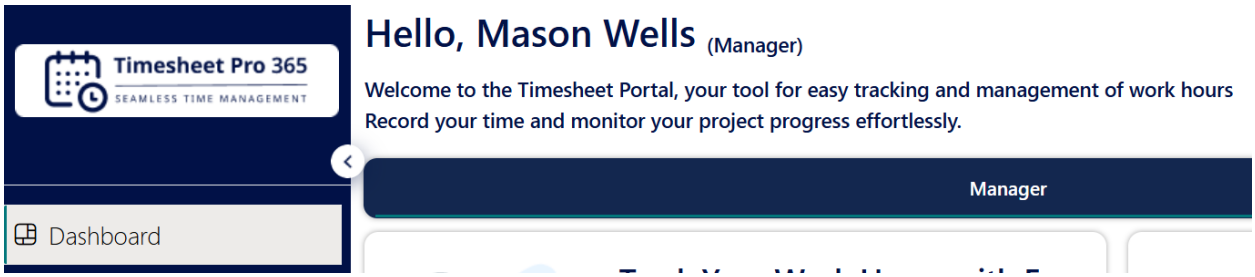
1. Timesheet Status Bar Graph: Visualize the manager's timesheets with a bar graph, categorizing them by status (e.g., Approved, Rejected, Pending, Draft) using distinct colors for clarity.



2. 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.

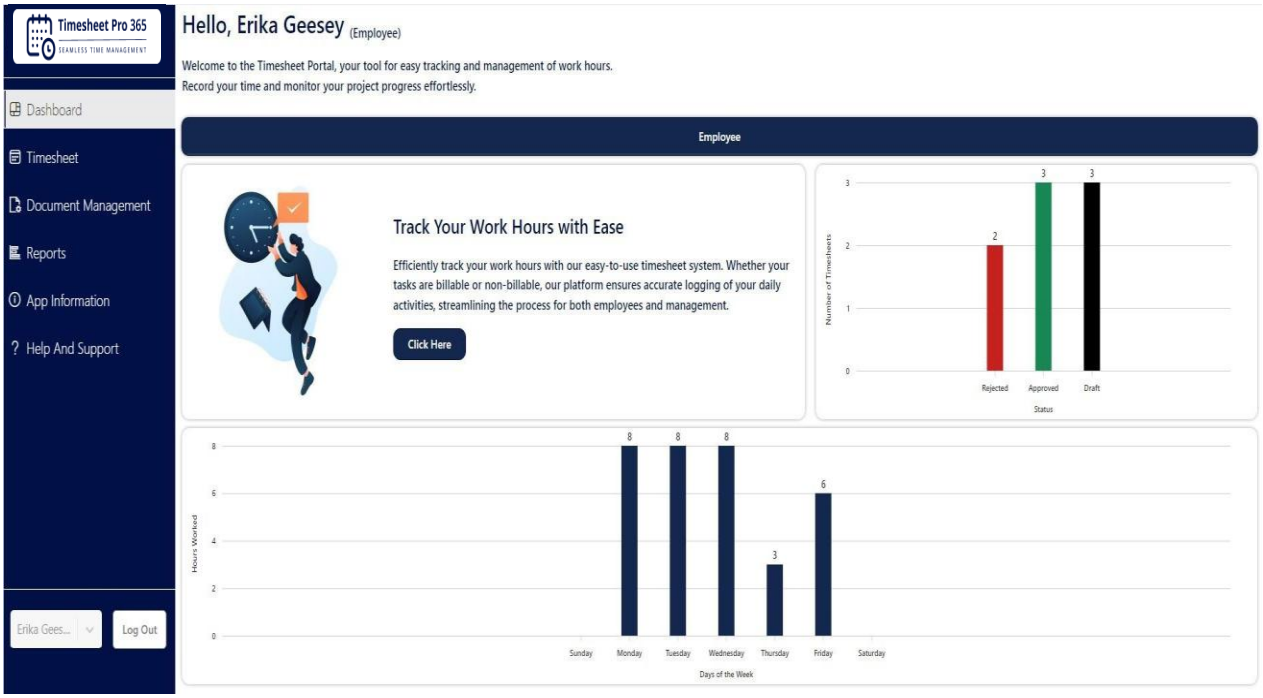


3. User Identification and Role Display: Retrieve and prominently display the current user's role (e.g., Manager) on the dashboard for easy identification.



Employee Dashboard

The **Employee Dashboard** offers employees a clear view of their timesheet submissions, daily work hours, and role information.

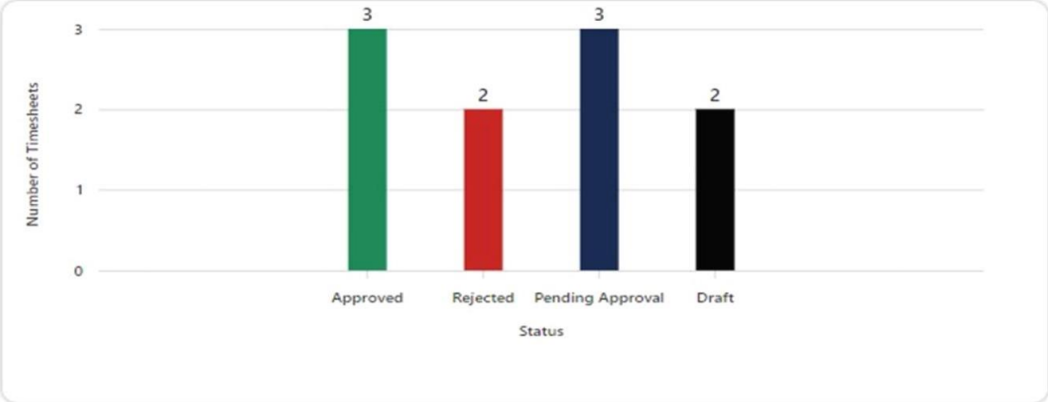


It includes the following components:

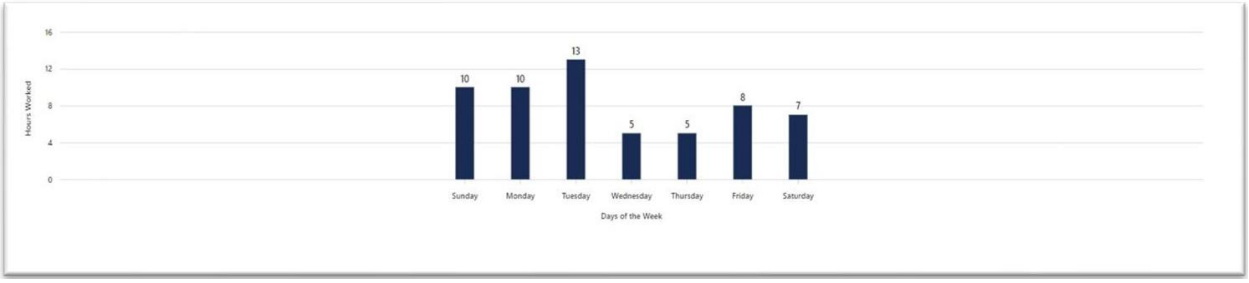
1. Timesheet Status Bar Graph
2. Hours Worked Bar Graph
3. User Identification and Role Display

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.

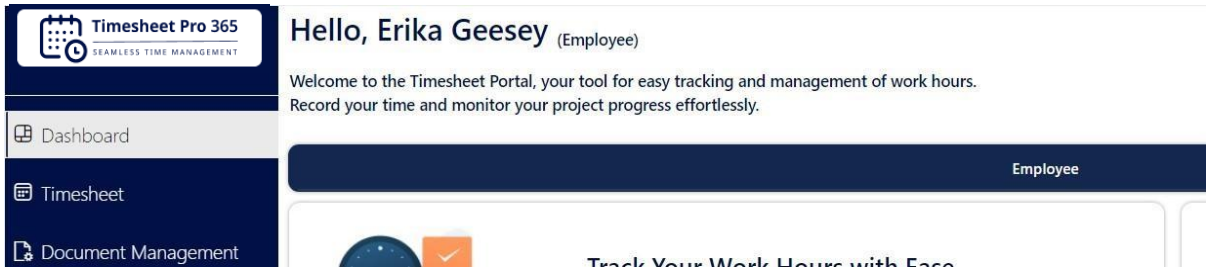
1. **Hours Worked Bar Graph:** Display a bar graph showcasing the employee's hours worked, divided by each day of the week.



2. **Hours Worked Bar Graph:** Display a bar graph showing the employee's hours worked, divided by each day of the week.



3. **User Identification and Role Display:** Retrieve and prominently display the current user's role(e.g.,Manager) on the dashboard for easy identification.



User Management

How to create a new Admin or Manager

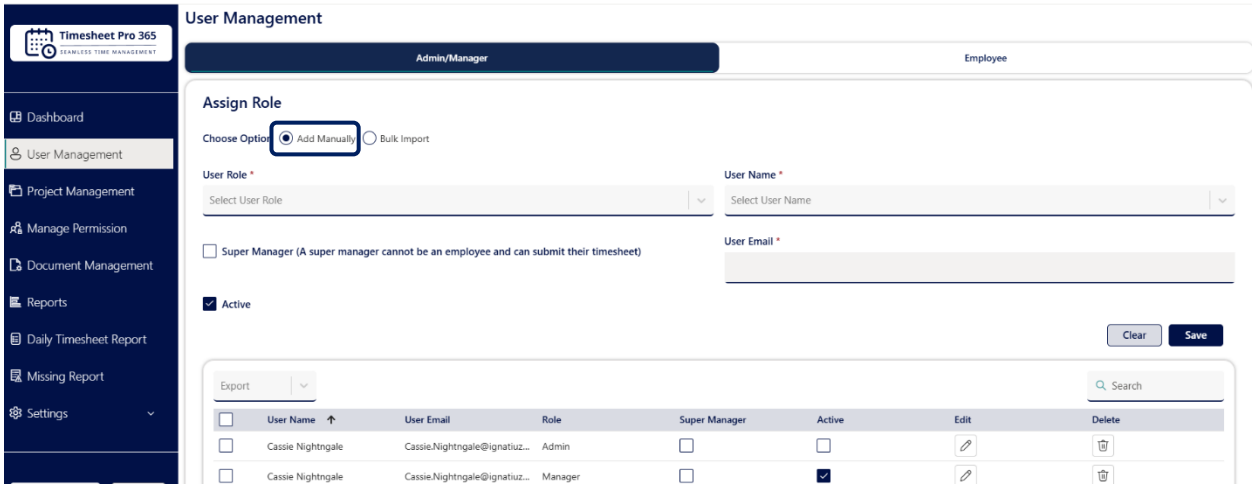
1. Role Selection: Enable the admin to choose the role from a predefined list.
2. User Email: Input the user's email address linked to this role.
3. Super Manager Option: Provide a checkbox for the administrator to designate the user as a Super Manager.
4. Activation Control: Offer an option for the 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.

There are two ways to create Admin/Manager

Add Manually

To assign the Admin or Manager role manually, follow these steps:

1. Select the **User Role** from the available options.
2. Select the **User Name** from the list.
3. The **User Email** field will be automatically populated based on the selected username.
4. Click Save.

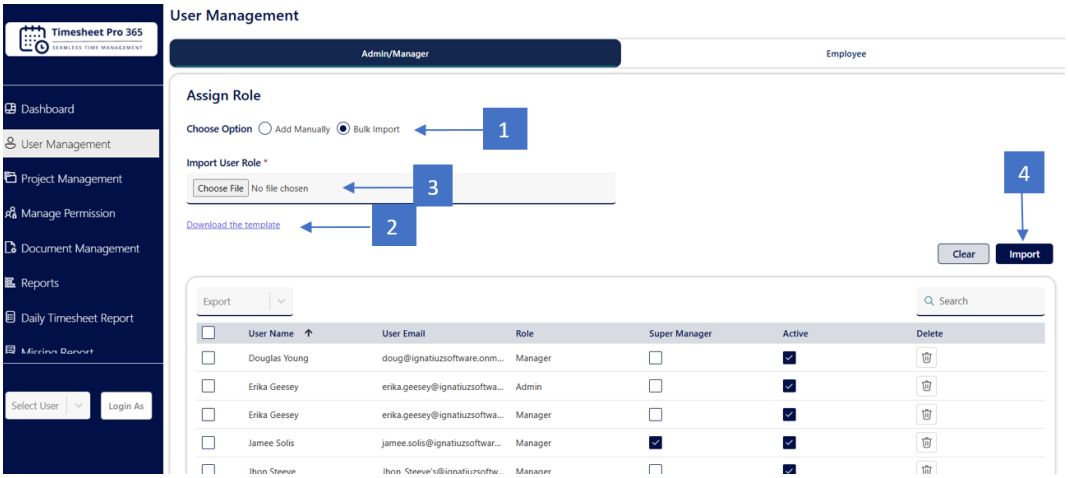


Bulk Import

On the **Admin/Manager** tab, a **Bulk Import** option is available with a radio button.
To create Admin/Manager users in bulk:

1. Select the **Bulk Import** radio button.
2. Download the correct format Excel file directly and update the downloaded Excel file with the desired data.

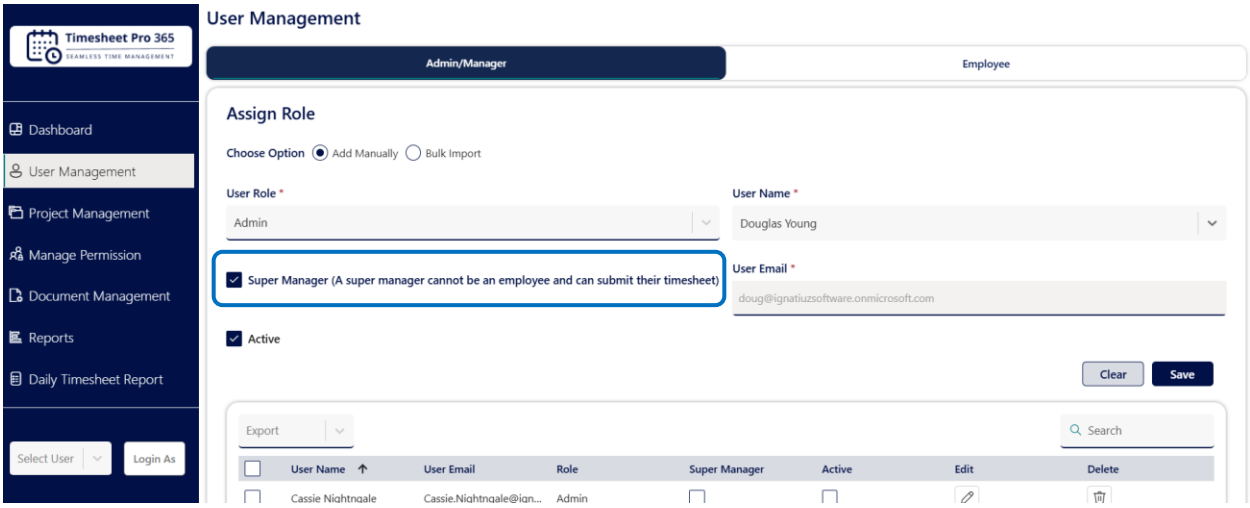
3. Select the file by clicking on the **Choose file** button and upload the file back to this page.
4. Click on the import button.

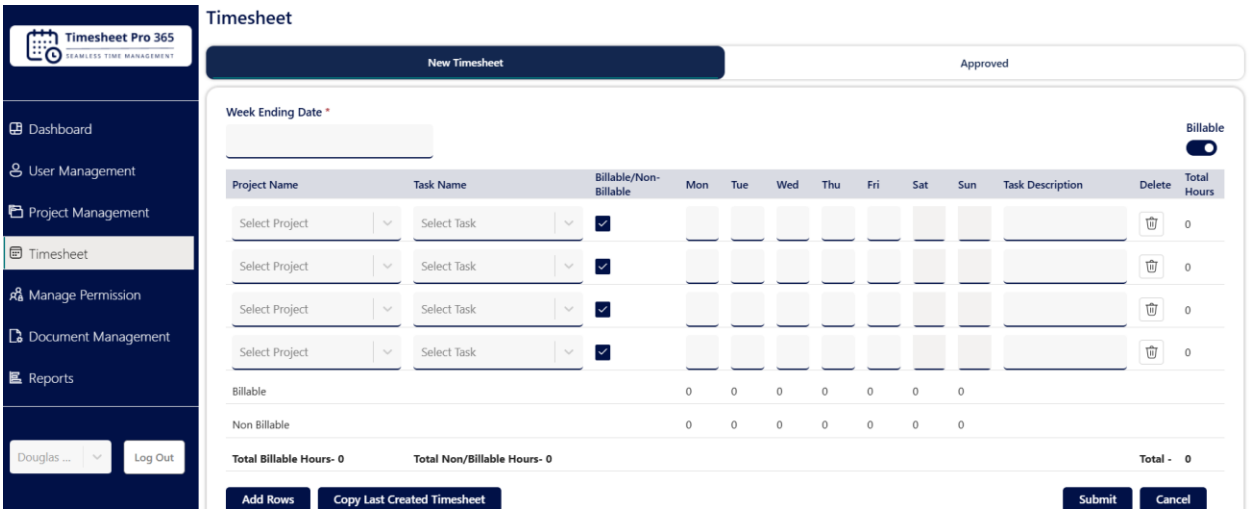


Assigning a Super Manager Role

To designate a user as a Super Manager, select the desired **User Role** and **User Name**, then check the **Super Manager** box before saving.

- A Super Manager cannot also be assigned as an employee.
- Super Managers can submit their own timesheets, which are automatically approved without going through the approval workflow.
- Super Managers can view all their submitted timesheets along with their status.

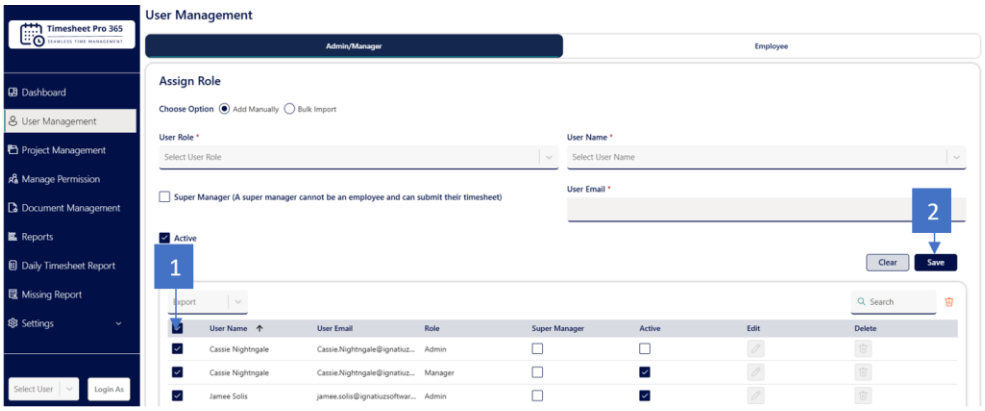


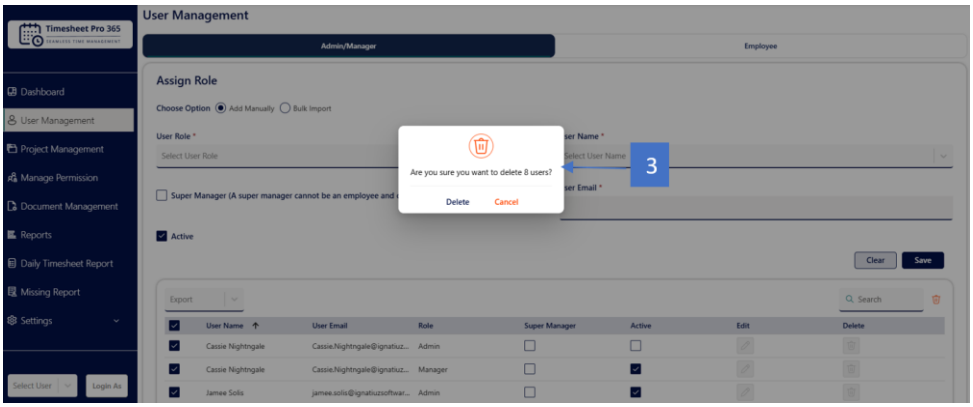


Bulk Delete Users for Admin/Manager Tab

The Bulk Delete feature allows **Admins** and **Managers** to delete multiple user records efficiently, streamlining the user management process.

1. Select multiple users by checking the boxes next to their names; once two or more are selected, the Bulk Delete option will appear in the top-right corner of the table.
2. Click the Bulk Delete option to remove all selected users.
3. A confirmation message will appear prompting you to confirm the deletion before proceeding.

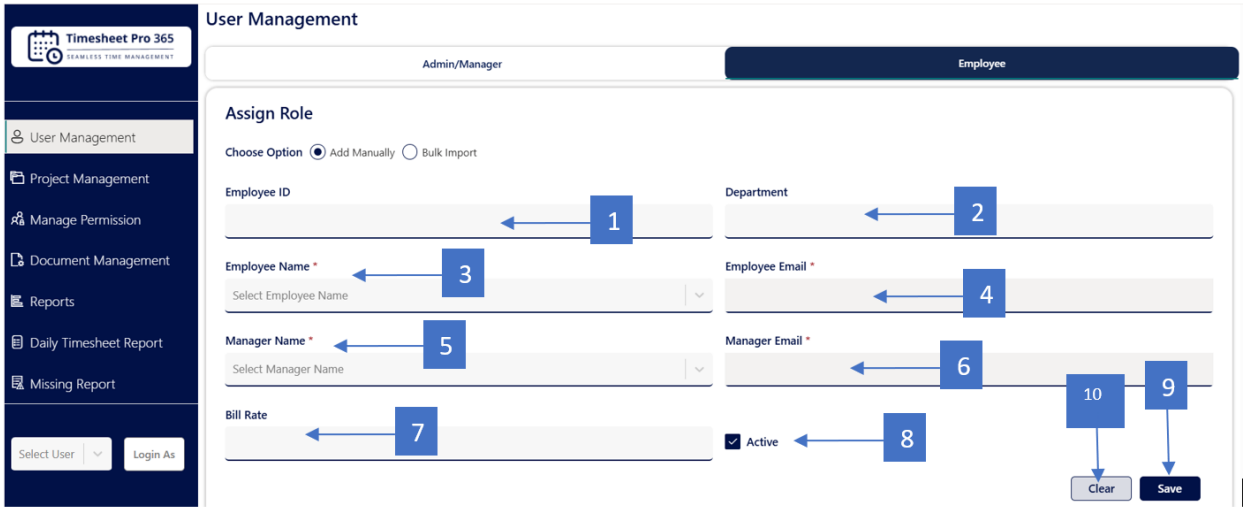




How to create a new Employee

Add Manually

1. Enter the **Employee ID** for the new user.
2. Specify the **Department** to which the employee belongs.
3. Select the **Employee Name** from the dropdown list.
4. The **Employee Email** field will be automatically populated based on the selected employee name.
5. Select the **Manager Name** from the dropdown list.
6. The **Manager Email** field will be automatically populated based on the selected manager.
7. Enter the applicable **Bill Rate** for the employee.
8. Select the **Active** checkbox if the employee should be active in the Timesheet application.
9. Click **Save** to create the new employee record.
10. Click **Clear** to reset all fields in the form.

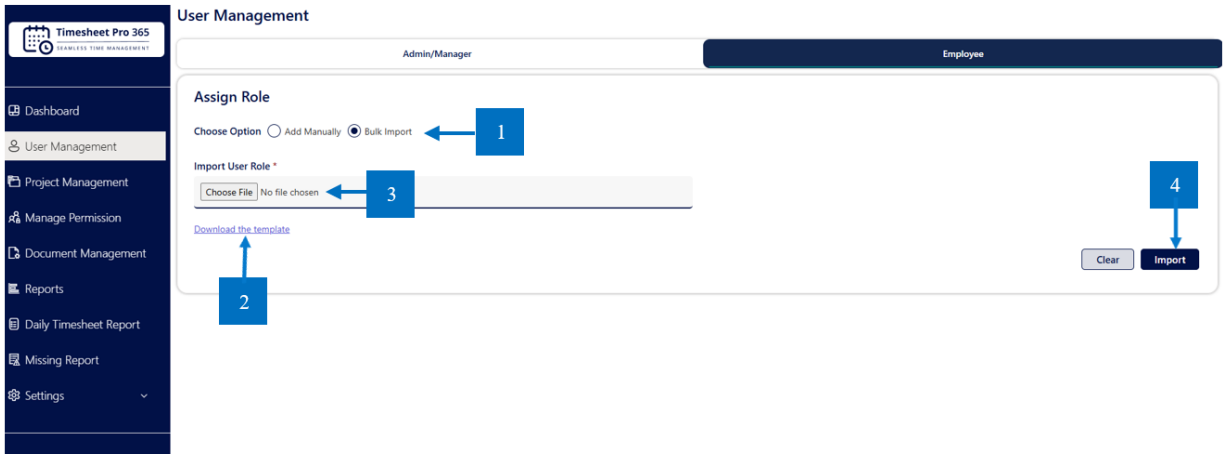


Bulk Import

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

To create Employees in bulk:

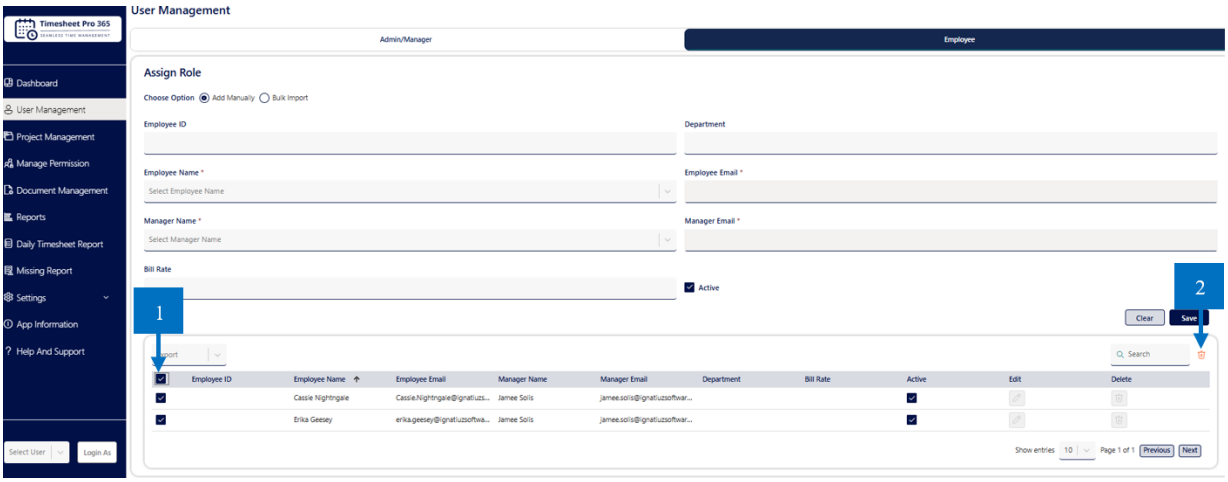
1. Select the Bulk Import radio button.
2. Download the correct format Excel file directly and add employee to the downloaded Excel file.
3. Select the file by clicking on the Choose file button and upload the file back to this page.
4. Click on the import button.

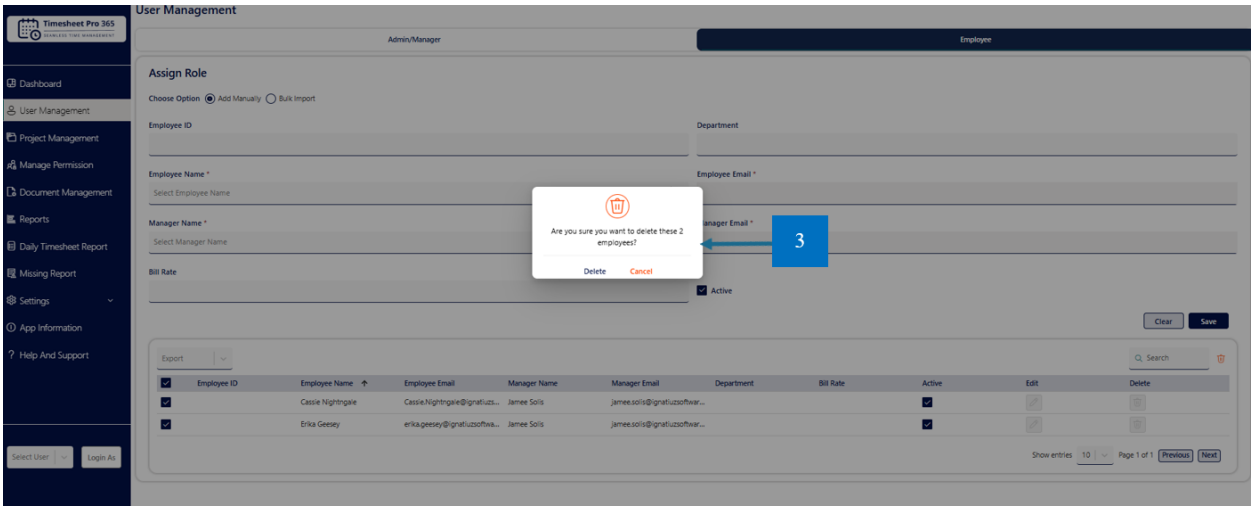


Bulk Delete Employee

The **Bulk Delete** feature allows Admins and Managers to delete multiple user records efficiently.

1. Select multiple employees by checking the boxes next to their names; once two or more are selected, the Bulk Delete option will appear in the top-right corner of the table.
2. Click the Bulk Delete option to remove all selected users.
3. A confirmation message will appear prompting you to confirm the deletion before proceeding.


User Management
Admin/Manager
Employee
Assign Role
Choose Option
Add Manually
Bulk Import
Employee ID
Department
Employee Name *
Employee Email *
Manager Name *
Manager Email *
Bill Rate
Active
Clear
Save
1
2
Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Missing Report
Settings
App Information
Help And Support
Select User
Login As
Export
Search
Employee ID
Employee Name
Employee Email
Manager Name
Manager Email
Department
Bill Rate
Active
Edit
Delete
Cassie Nightngale
Erika Geesey
Jamee Solis
Show entries
Page 1 of 1
Previous
Next


User Management
Admin/Manager
Employee
Assign Role
Choose Option
Add Manually
Bulk Import
Employee ID
Department
Employee Name *
Employee Email *
Manager Name *
Bill Rate
Active
Clear
Save
Are you sure you want to delete these 2 employees?
Delete
Cancel
3
Dashboard
User Management
Project Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Missing Report
Settings
App Information
Help And Support
Select User
Login As
Export
Search
Employee ID
Employee Name
Employee Email
Manager Name
Manager Email
Department
Bill Rate
Active
Edit
Delete
Cassie Nightngale
Erika Geesey
Jamee Solis
Show entries
Page 1 of 1
Previous
Next

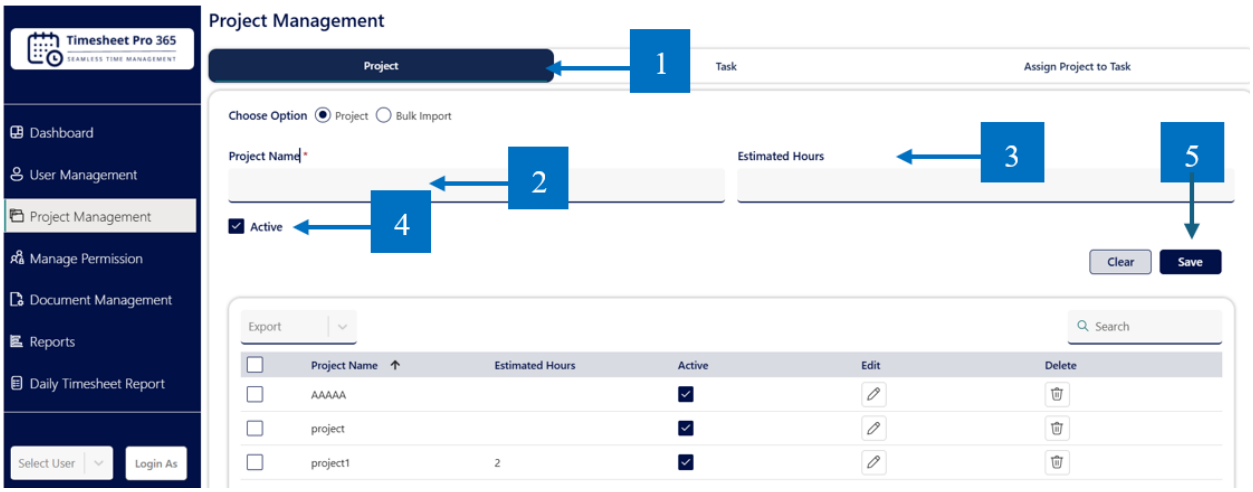
Project Management

How to create a new Project:

Add Manually

To manage projects effectively, administrators and users can add new projects or tasks by following these steps:

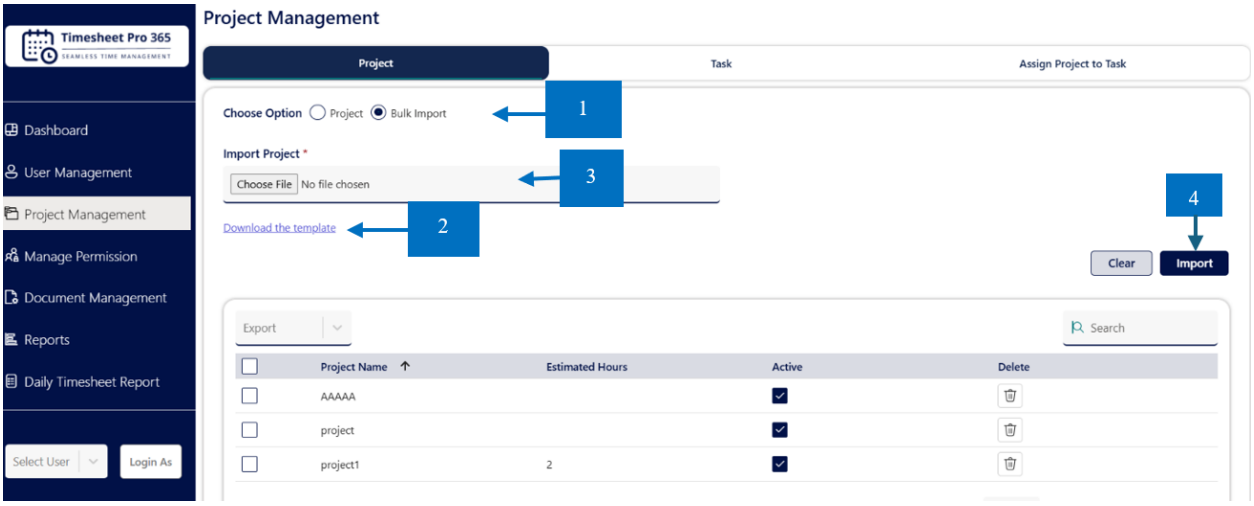
1. Navigate to the Projects tab; a form will appear for creating a new project.
2. Enter the project name in the provided text field.
3. Specify the estimated hours required to complete the project.
4. Check or uncheck the Active checkbox to mark the project as active or inactive.
5. Click the Save button to store the project details.



Bulk Import

The Bulk Import feature allows you to upload multiple projects at once, saving time and effort. Follow the steps below to perform a bulk import of projects:

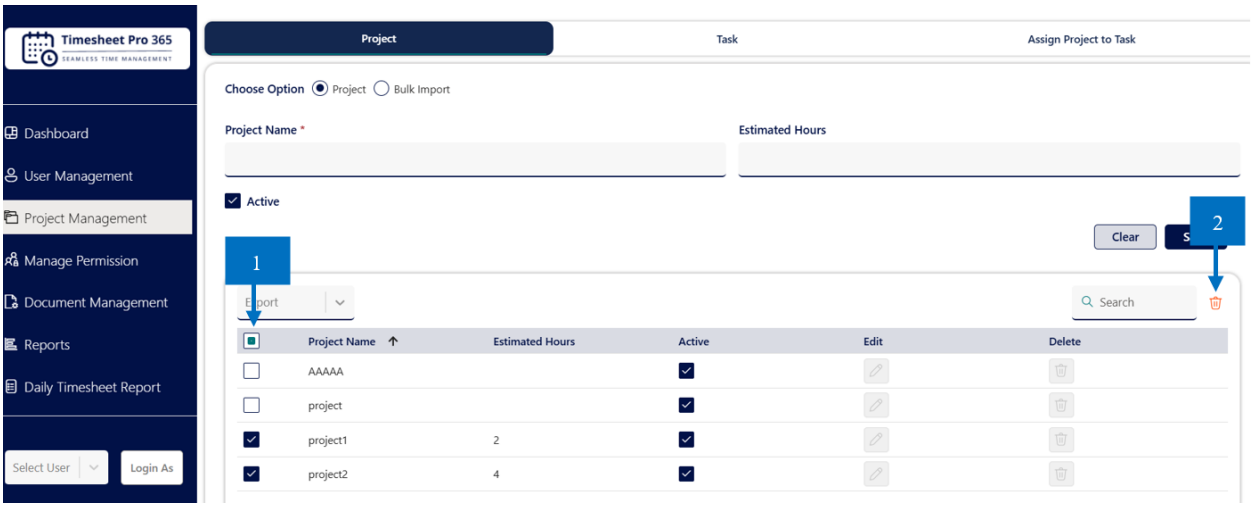
1. Select the Bulk Import radio button on the Project tab.
2. Download the correct format Excel file and add project details to the downloaded file.
3. Select the file by clicking the Choose file button and upload it back to this page.
4. Click the Import button.

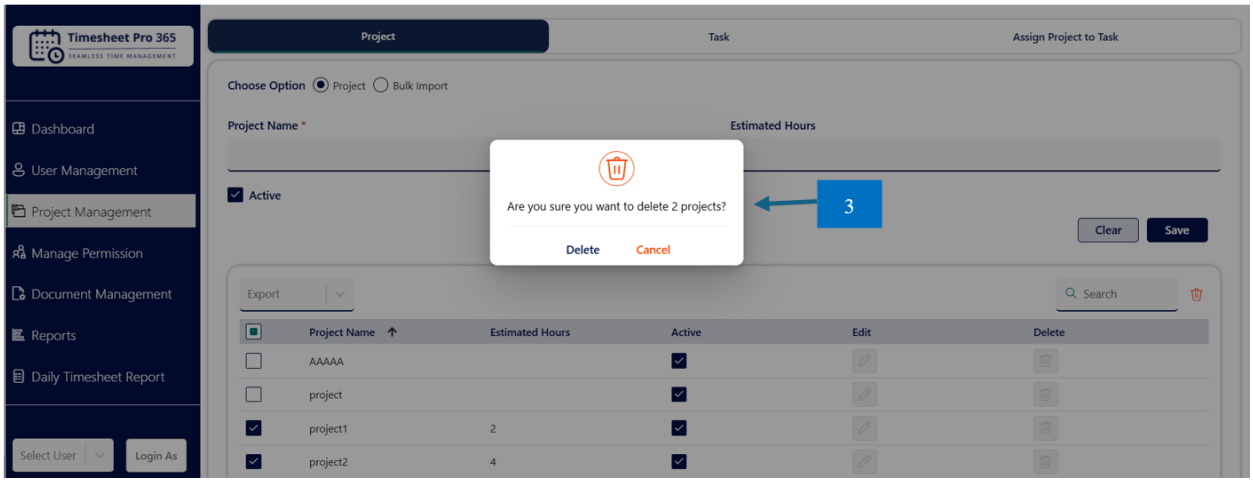


Bulk Delete Projects

The Bulk Delete feature allows you to delete multiple projects efficiently.

1. Select multiple projects by checking the boxes next to their names; once two or more are selected, the Bulk Delete option will appear in the top-right corner of the project table.
2. Click the Bulk Delete option to remove all selected projects.
3. A confirmation message will appear prompting you to confirm the deletion before proceeding.

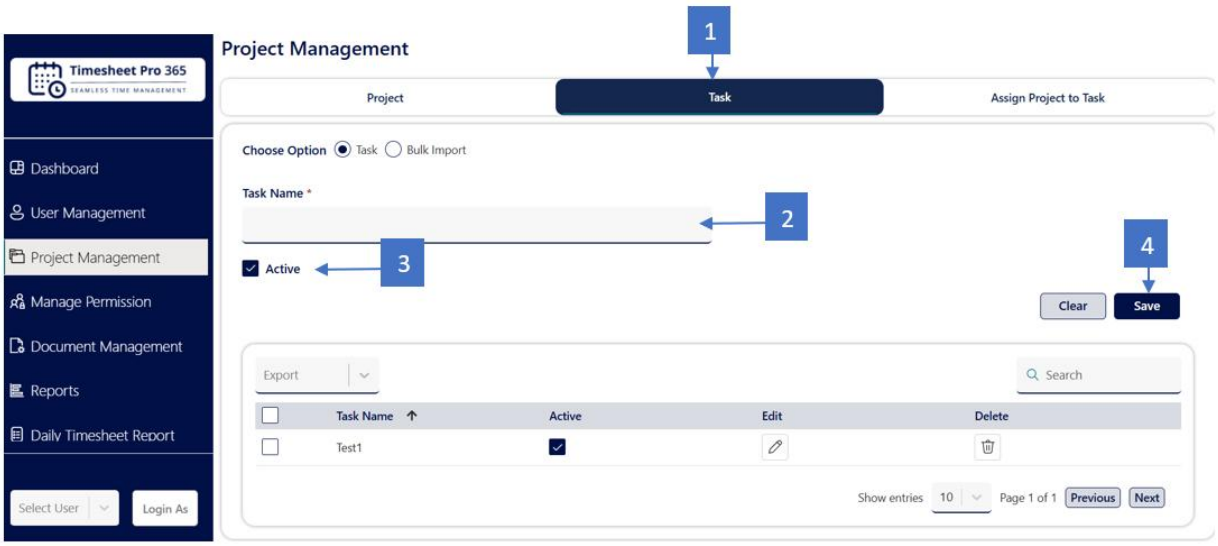




How to create a new Task

Add Manually

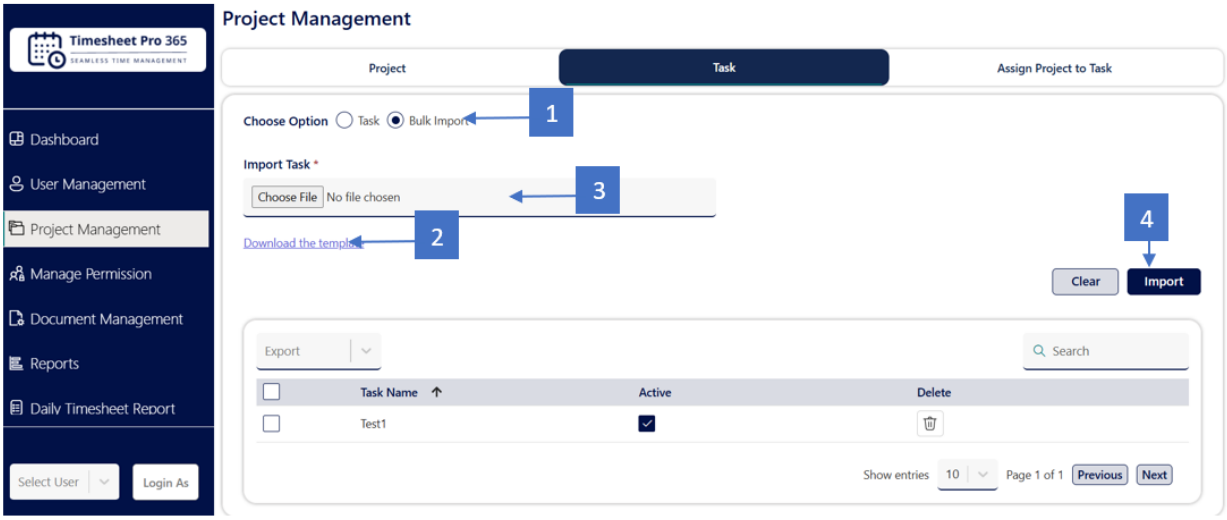
1. Navigate to the Task tab within the Project Management section, where a form will appear to create a new task.
2. Type the name of the task in the provided field.
3. Optionally check the Active checkbox to make the task active or uncheck it to make it inactive.
4. Click Save to add the new task to the system.



Bulk Import

The Bulk Import feature allows you to upload multiple tasks at once, saving time and effort.

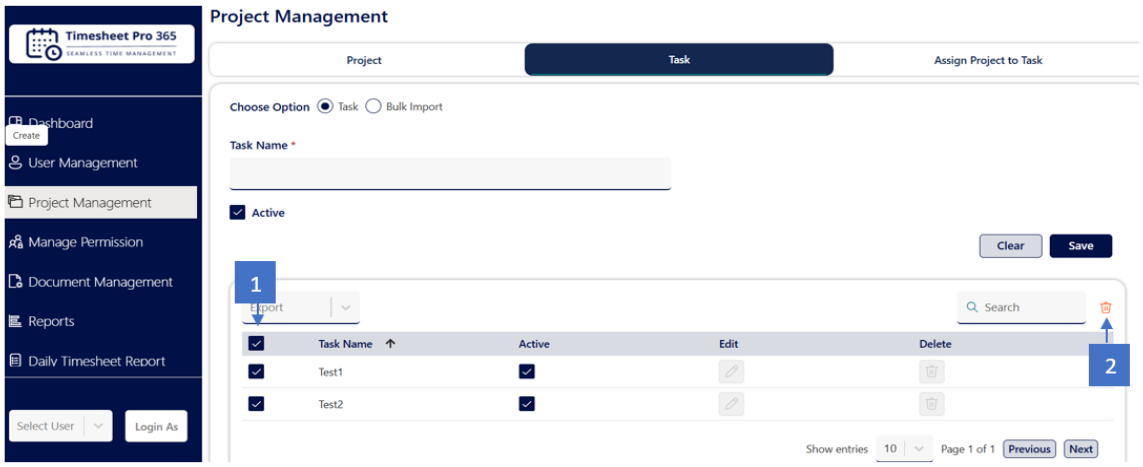
1. Select the Bulk Import radio button on the Task tab.
2. Download the correct format Excel file and add task details to the downloaded file.
3. Select the file by clicking the **Choose file** button and upload it back to this page.
4. Click the **Import** button.



Bulk Delete Tasks

Admin/managers can delete multiple tasks at once.

1. In the task list table, select two or more task checkboxes.
2. When multiple tasks are selected, the **Bulk Delete option** appears at the top right of the list. Click **Bulk Delete** and confirm to remove the selected tasks.

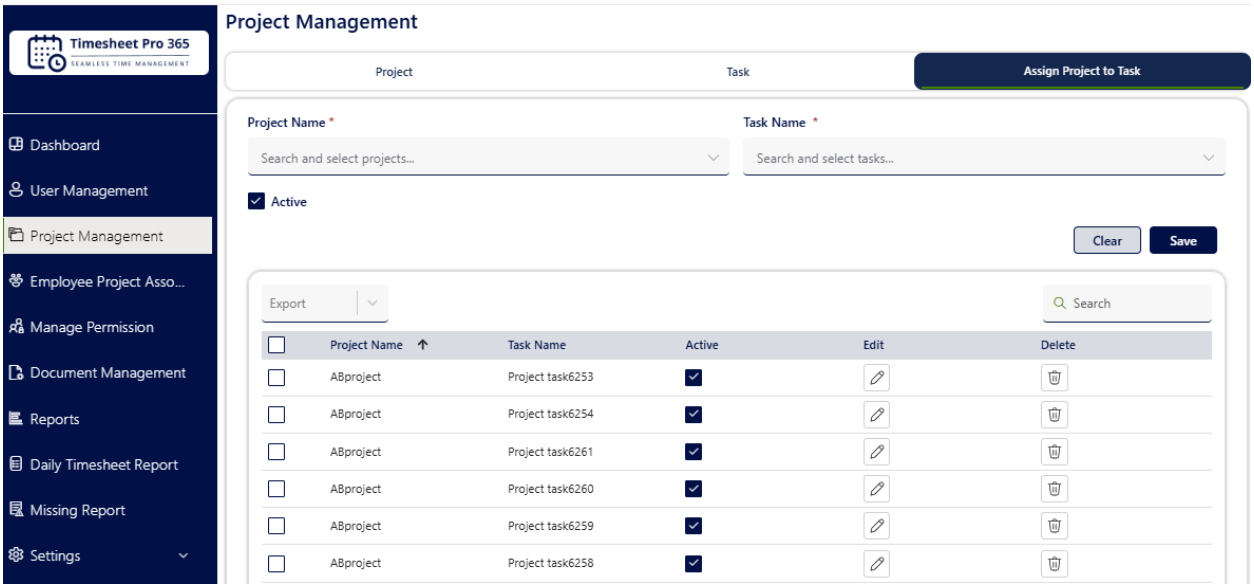


Assign Project to Task

Once users click on the **Assign Project to Task** tab within the **Project Management** section, a form will appear to assign a project to a task. Follow these steps to complete the process:

1. In the **Assign Project to Task** form, select the desired project from the **Project Name** dropdown menu.
2. Next, choose the task to which you want to assign the project from the **Task Name** dropdown menu.
3. After selecting both the project and the task, click the **Save** button to finalize the assignment.

This process will associate the chosen project with the selected task, simplifying task and project management.



Excel Format for Bulk Import

When you download the template from the **Bulk Import** option, the following format will appear in the Excel file. This format is used for adding **Projects** and **Tasks** into the system.

1. Excel Format for Project

- **Project Name:** Enter the name of the project (e.g., Project1, Project2).
- **Estimated Hours:** Input the estimated hours for the project (e.g., 100, 200).
- **Active:** Specify whether the project is active or inactive by typing **TRUE** for active projects and **FALSE** for inactive projects.

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

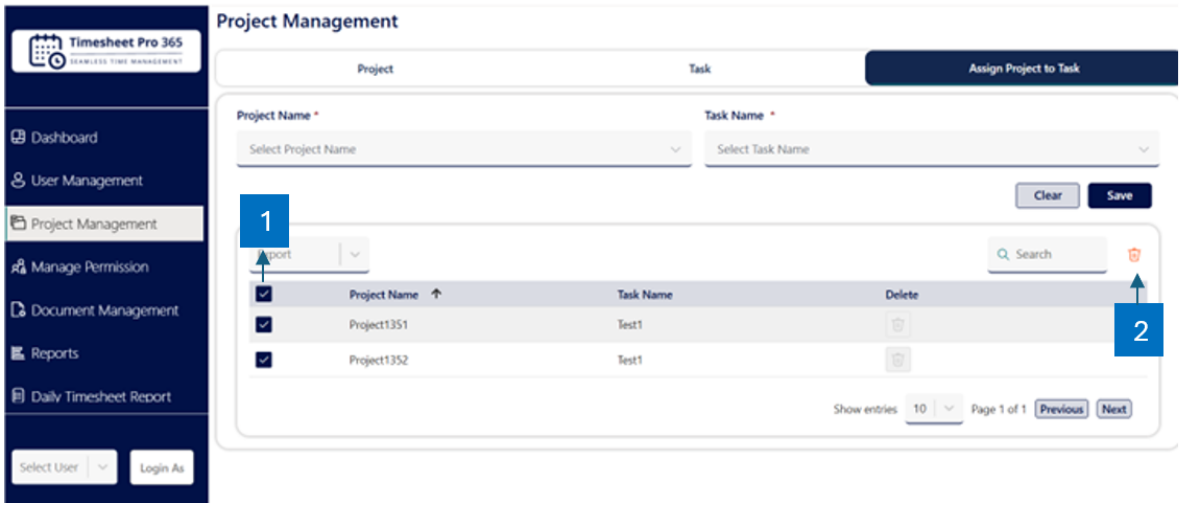
- **ProjectTask:** List the names of tasks (e.g., Project task1, Project task2).
- **Active:** Specify whether the task is active or inactive by typing **TRUE** for active tasks and **FALSE** for inactive tasks.

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

Bulk Delete project-to-task assignments.

The Bulk Delete feature allows the removal of multiple project-to-task assignments in a single action.

1. Select two or more assignment checkboxes from the list.
2. The **Bulk Delete option** will appear once multiple rows are selected.
3. Click **Bulk Delete** and confirm to remove the assignments.

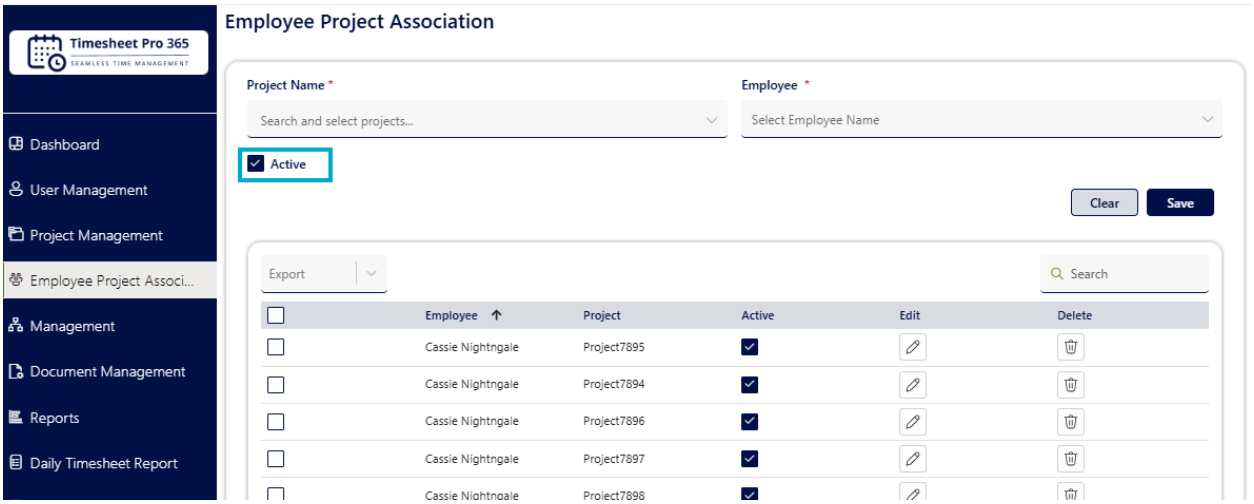


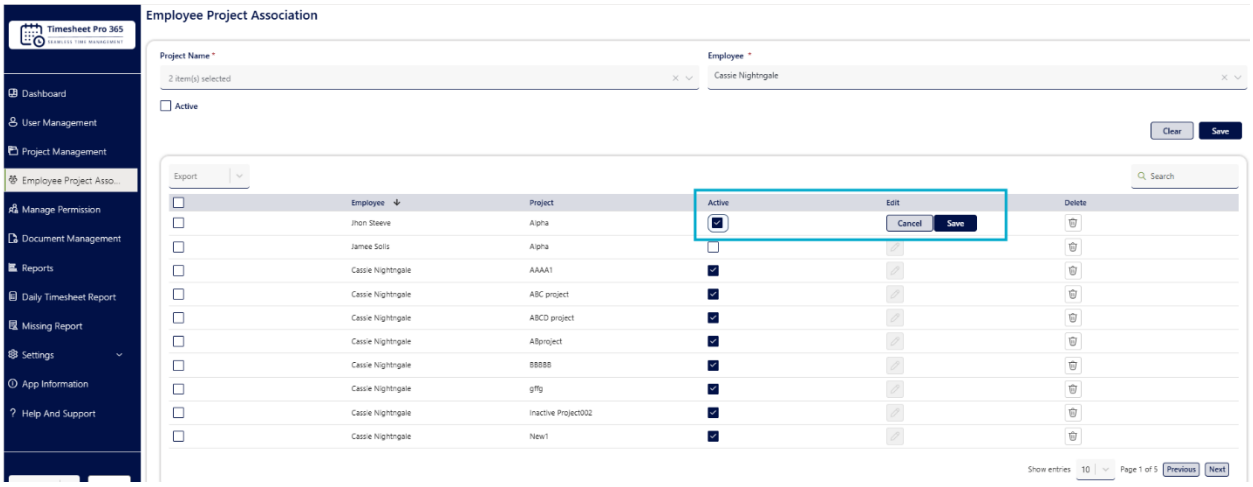
Employee Project Association

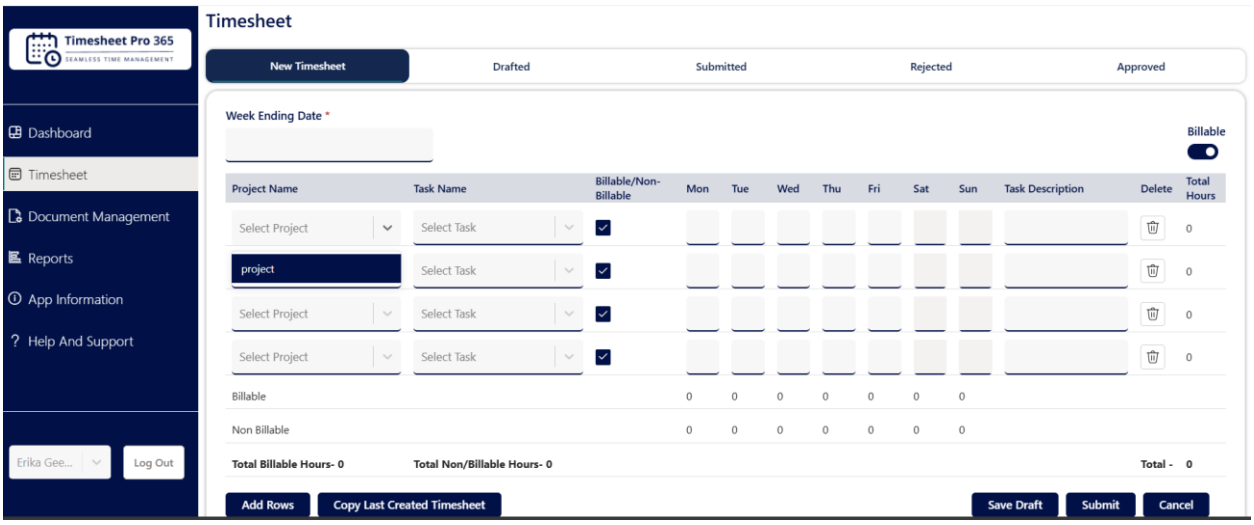
The **Employee Project Association** feature allows Admins and Managers to assign specific projects to specific employees.

- **Toggle Controlled Access:**
  This feature is only available if the **Employee Project Relation** toggle is turned ON.
  - The toggle can **only be enabled by the Admin** from **General Settings → Management Settings**.
- **Visibility & Access:**
  - Once enabled, the **Employee Project Association** module becomes visible on the **Admin and Manager dashboards**.
  - This module is **not visible to other user roles**.
- **Functionality:**
  - Admins and Managers can view a list of employees and available projects.
  - They can assign one or multiple projects to a selected employee.
  - Once assigned, employees will see their assigned projects listed in their **Timesheet** section.

- Admins and Managers can set the Active/Inactive status of a Project assigned to an Employee, and can update this status at any time for the selected Employee.



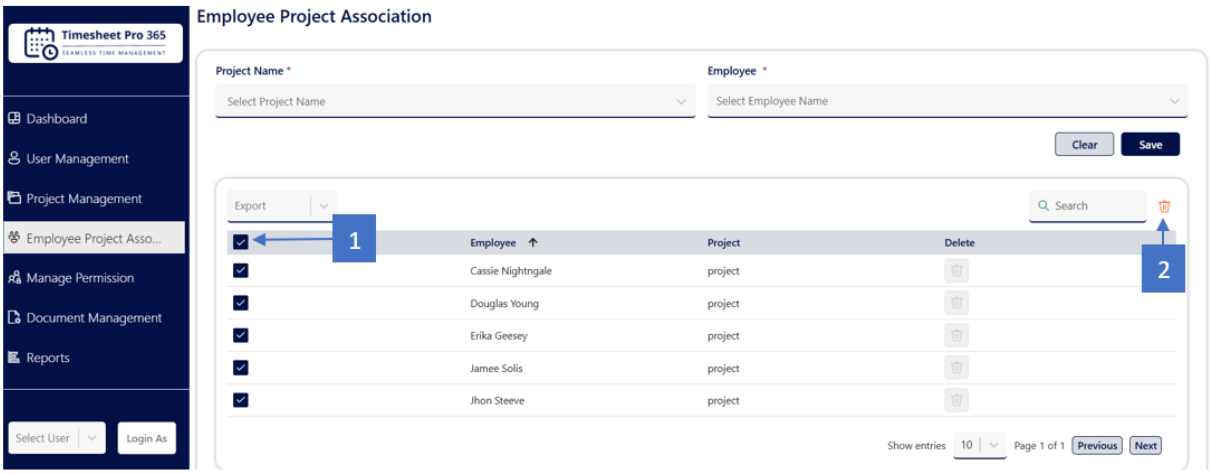


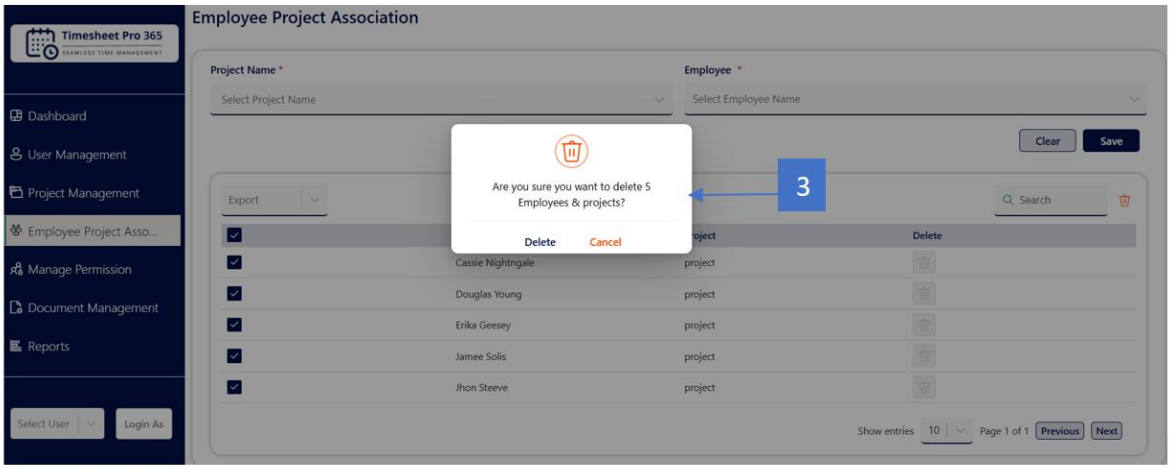


Bulk Delete for Employee Project Association

The Bulk Delete feature allows **Admins** and **Managers** to delete multiple records efficiently, streamlining the user management process.

1. Select two or more checkboxes from the list.
2. The **Bulk Delete option** will appear once multiple rows are selected.
3. Click **Bulk Delete** and confirm to remove the associations.





Manage Permission

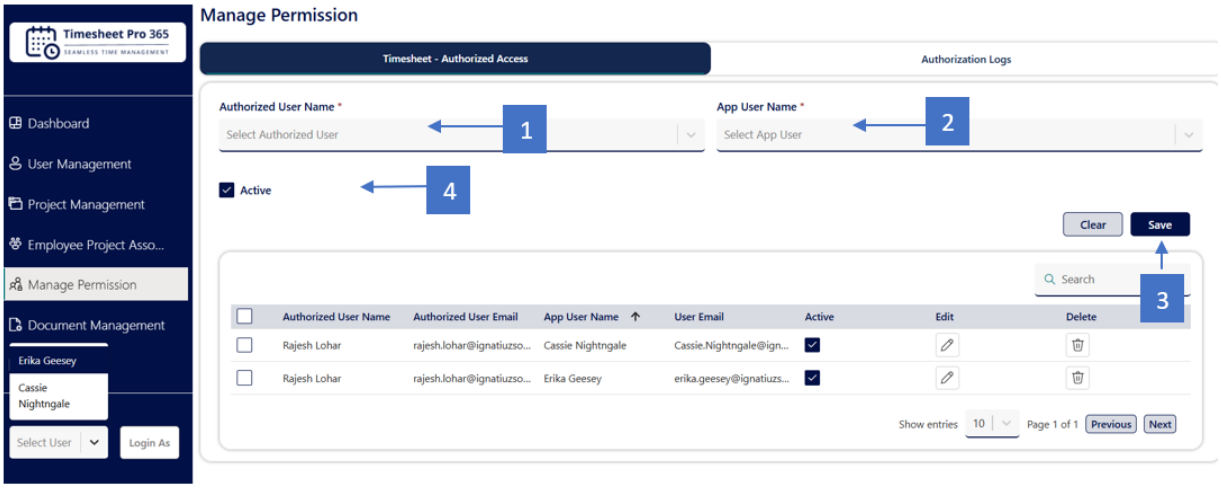
Timesheet- Authorized Access

The **Authorized Access** feature allows administrators to grant one user permission to access another user's timesheet account. This is useful in scenarios such as delegating timesheet responsibilities or providing temporary access.

How to Grant Authorized Access

Follow the steps below to assign access from one user to another:

1. In the **Authorized User Name** field, type the username of the person you want to grant access **to**. This is the user who will gain access.
2. Use the **App User Name** dropdown to select the user **whose account** will be accessed. This is the account the authorized user will be able to view or manage.
3. Click the **Save** button to complete the assignment. Once saved, the authorized user will have access to the selected user's timesheet account as per the permissions set.
4. If access is no longer needed, you can deactivate it by marking the assigned user as **Inactive**. Once set to inactive, the authorized user will **no longer have access** to the associated user’s account.

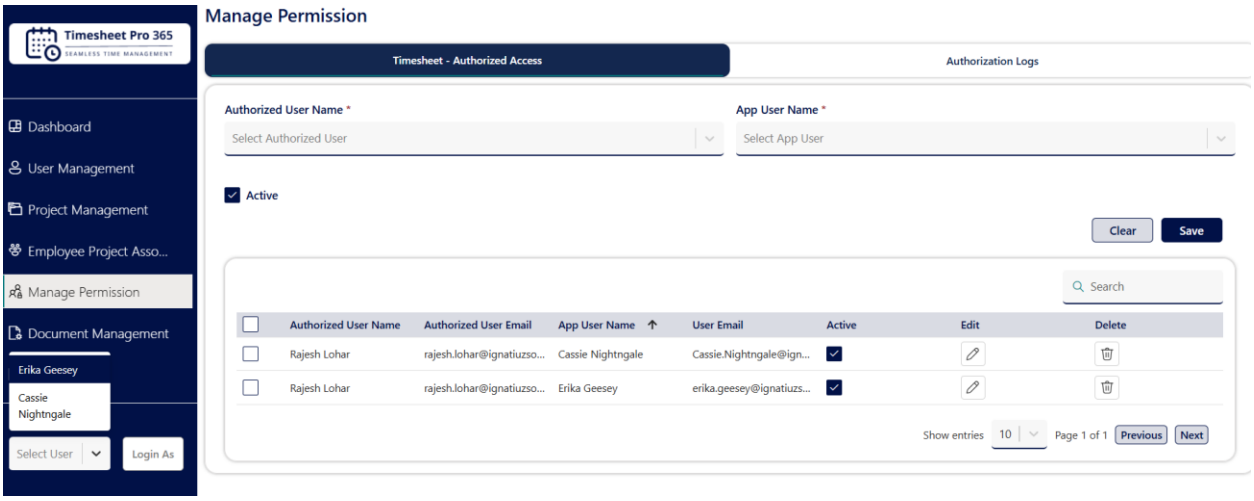


Select App User

To assign management permissions and log in as another user, follow these steps:

1. Once the user is granted management permissions, they will appear in the dropdown list.
2. In the **App User Name** dropdown, select the user you want to manage.
3. After selecting the desired app user, click on the **Login As** button. This allows the admin to log in as the selected user and perform actions on their behalf.

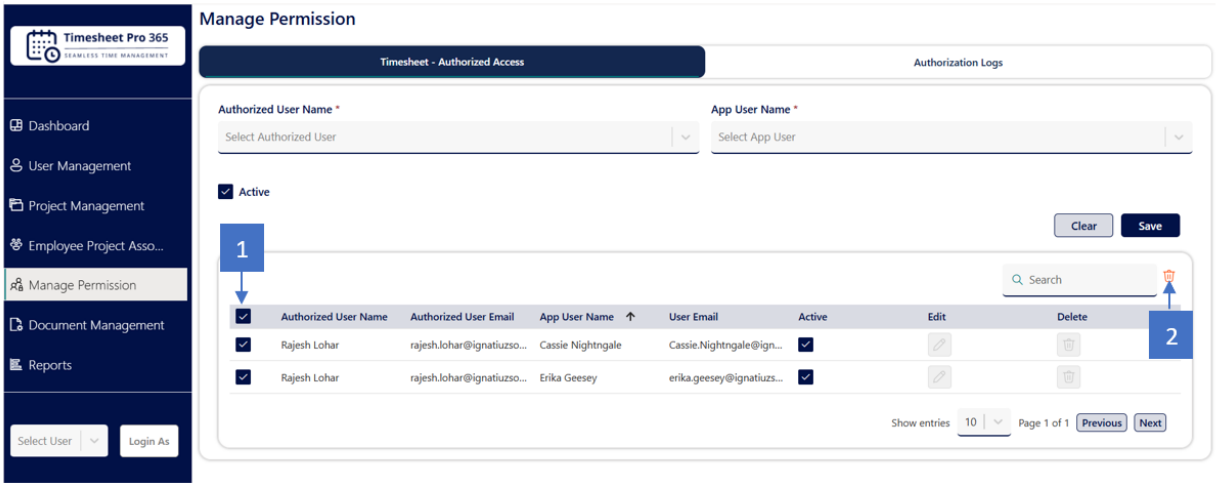
By following these steps, you can efficiently manage user permissions and log in to any account for administrative tasks.

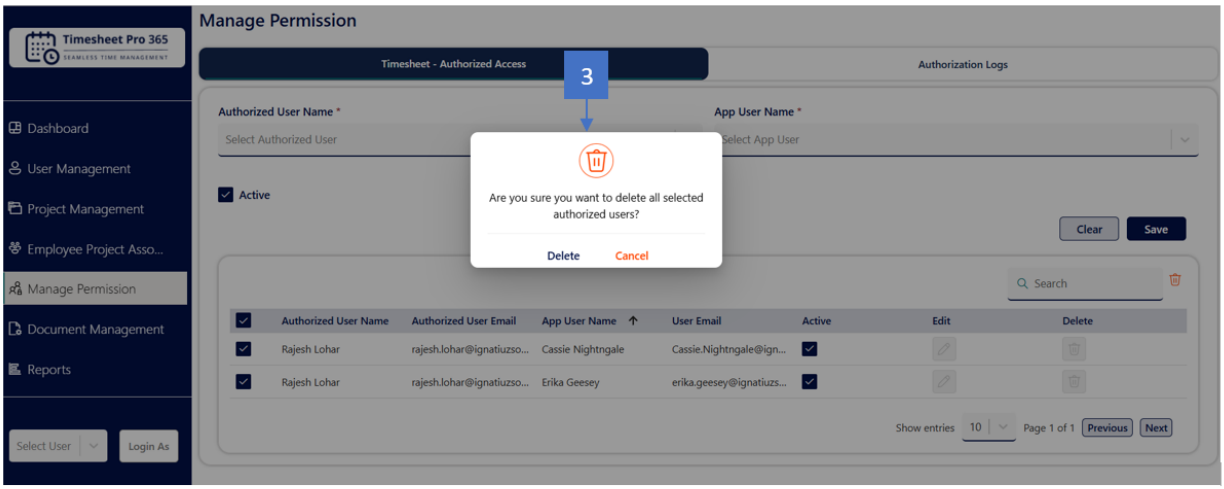


Bulk Delete Authorized User:

The **Bulk Delete** feature allows you to remove multiple authorized users from the system at once, saving time and improving efficiency when managing user access. Follow these steps to bulk delete authorized users.

1. To bulk delete the authorized users, select two or more checkboxes next to the users you want to delete.
2. Once multiple checkboxes are selected, the Bulk Delete button will appear.
3. Click Bulk Delete and confirm the deletion when prompted.



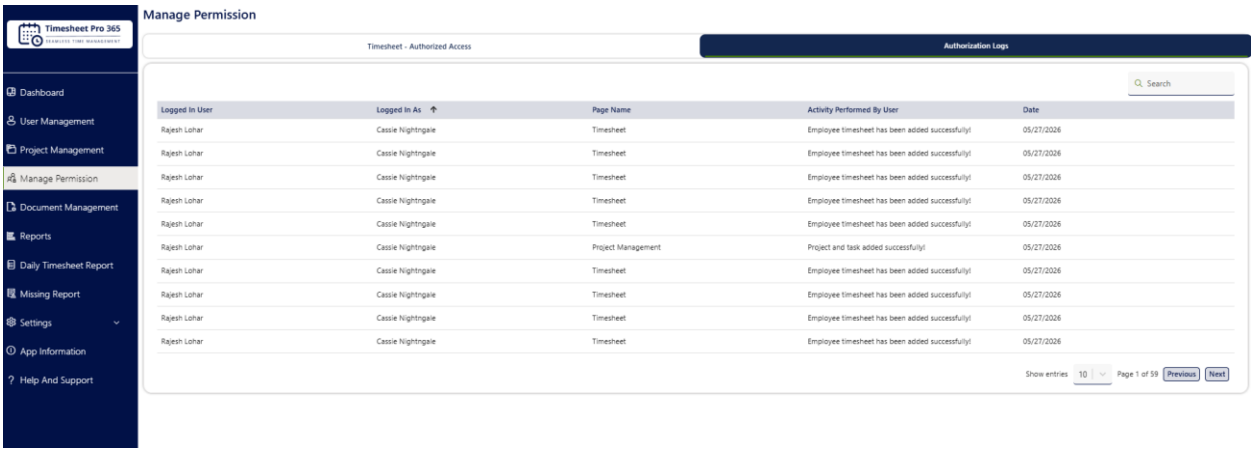


Authorization Logs

The **Authorization Logs** section records all activities performed by the admin when modifying access permissions or performing actions on behalf of other users. These logs are crucial for tracking changes and ensuring transparency in user management.

How It Works:

1. **Logged In User:** This column displays the **admin user** who is logged in and performing actions.
2. **Logged In As:** This shows the **user** who is being affected by the admin's actions. For example, if the admin is changing permissions or updating timesheet details for another user, that user will be displayed here.
3. **Page Name:** The **page** where the action took place, such as **Timesheet** or another section of the portal.
4. **Activity Performed by User:**
   This column outlines the specific action taken, such as:
   - "Employee timesheet added successfully!"
   - "Email setting has been updated!"
   - "Employee timesheets update successfully!"
5. **Date:**
   This column shows the **date** when the action was performed.



Document Management

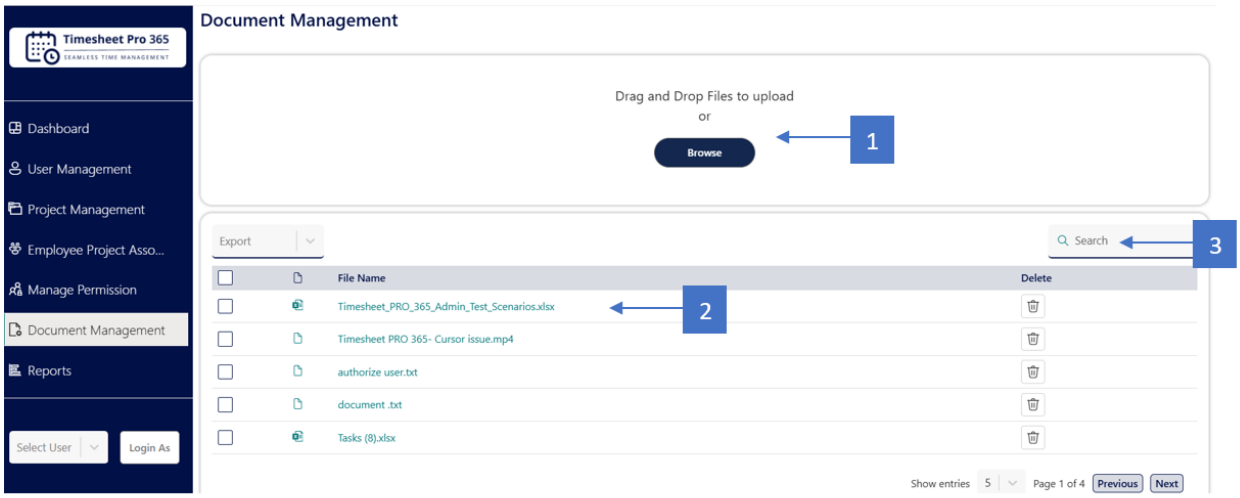
1. Only **Admin** users can upload documents. You can use one of the following methods:

- **Browse:** Click the **Browse** button to open the file explorer, select the required document, and upload it.
- **Drag and Drop:** Drag the document from your file explorer and drop it into the designated upload area.

2. Once uploaded, files are displayed in a table below the upload section. Each entry shows the file name, and Admin users can delete files if necessary.

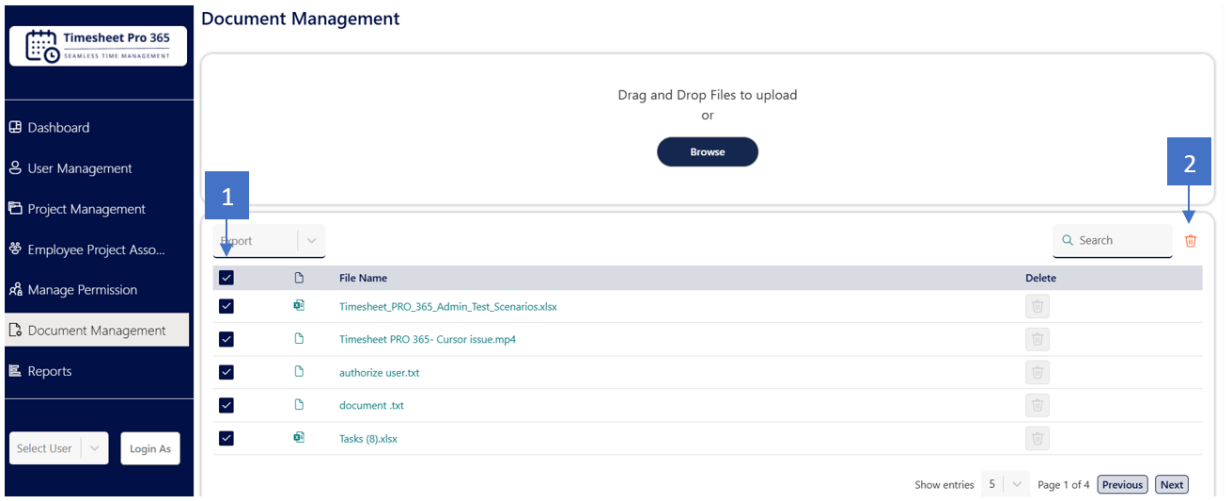
3. Use the **Search** bar to quickly locate documents by name.

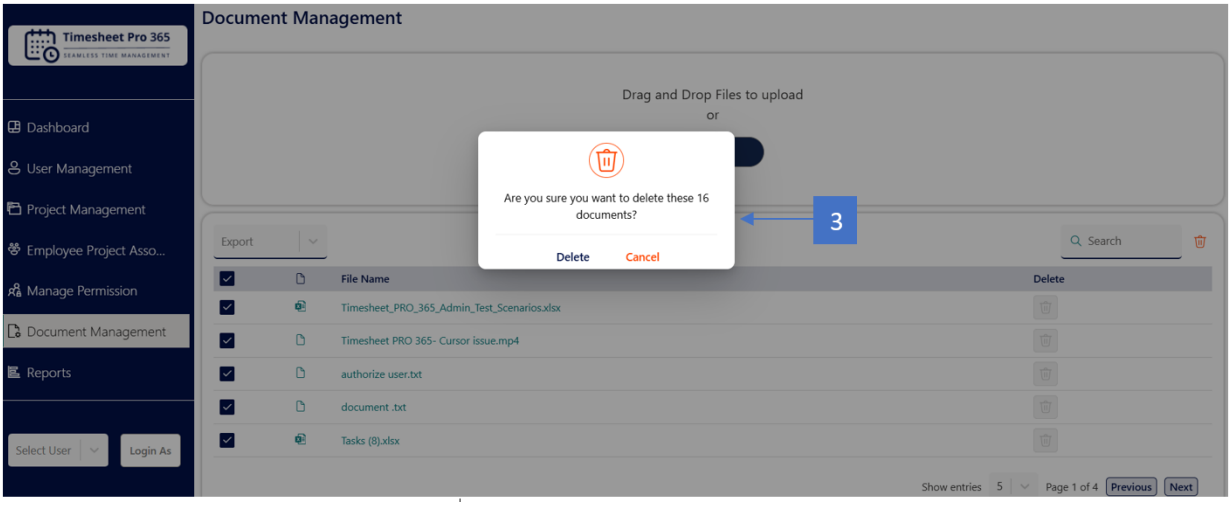
Note: Managers and Employees have **view-only access** to uploaded documents.



Bulk Delete Document Management

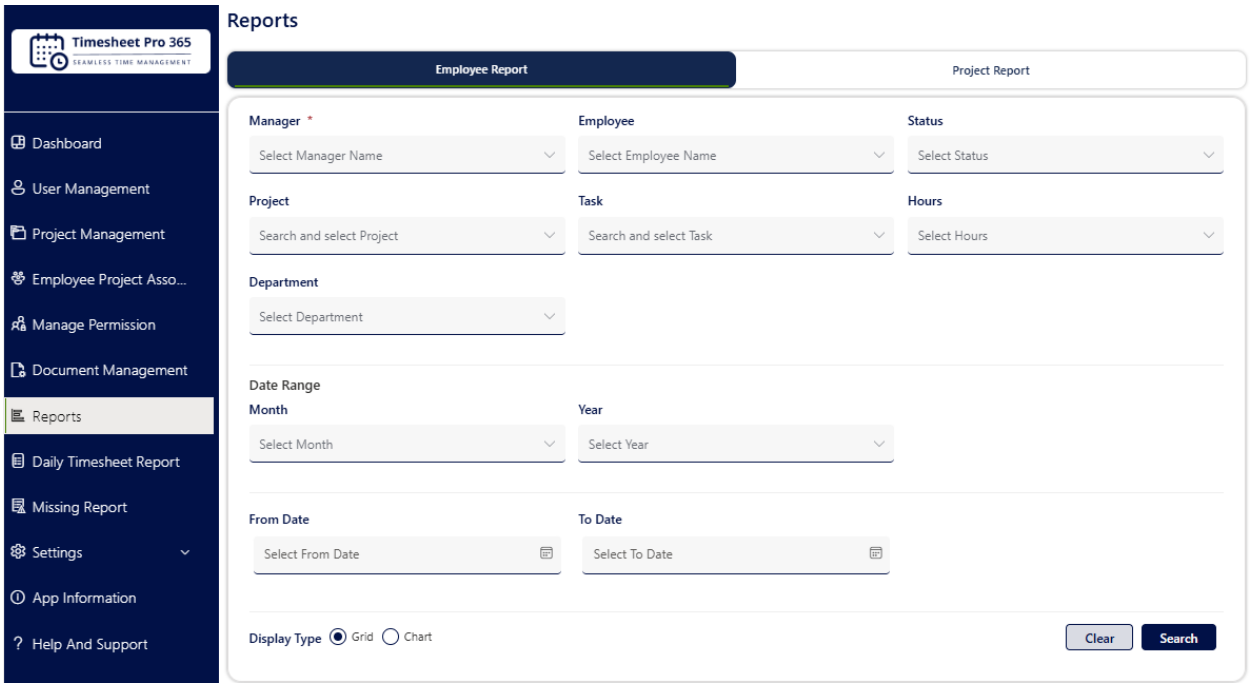
1. Admin can select multiple documents by checking the checkboxes next to the documents they want to delete. After selecting multiple documents, the **Bulk Delete** button will appear.
2. Click the **Bulk Delete** button to remove the selected documents.
3. A confirmation prompt will appear asking you to confirm the deletion. Once confirmed, the selected documents will be permanently deleted from the system.





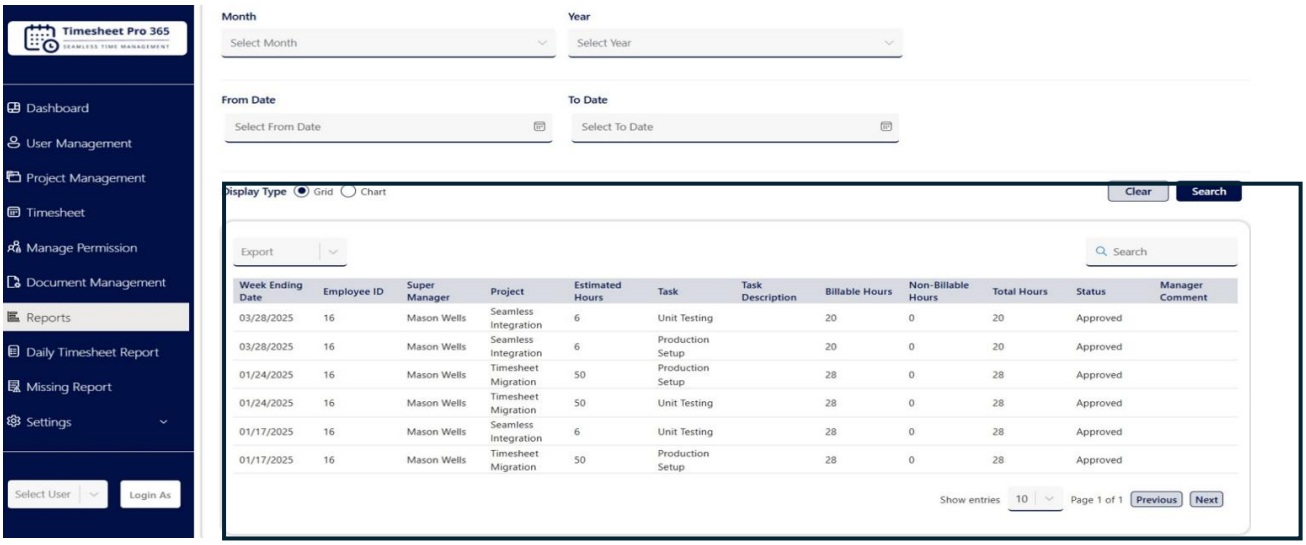
Reports

1. Within the Reports section, you can use various filters, such as Super Manager, Manager Name, date range, employee name, project, department filter and timesheet status.
2. After applying the desired filters, click the Search button to generate the report.



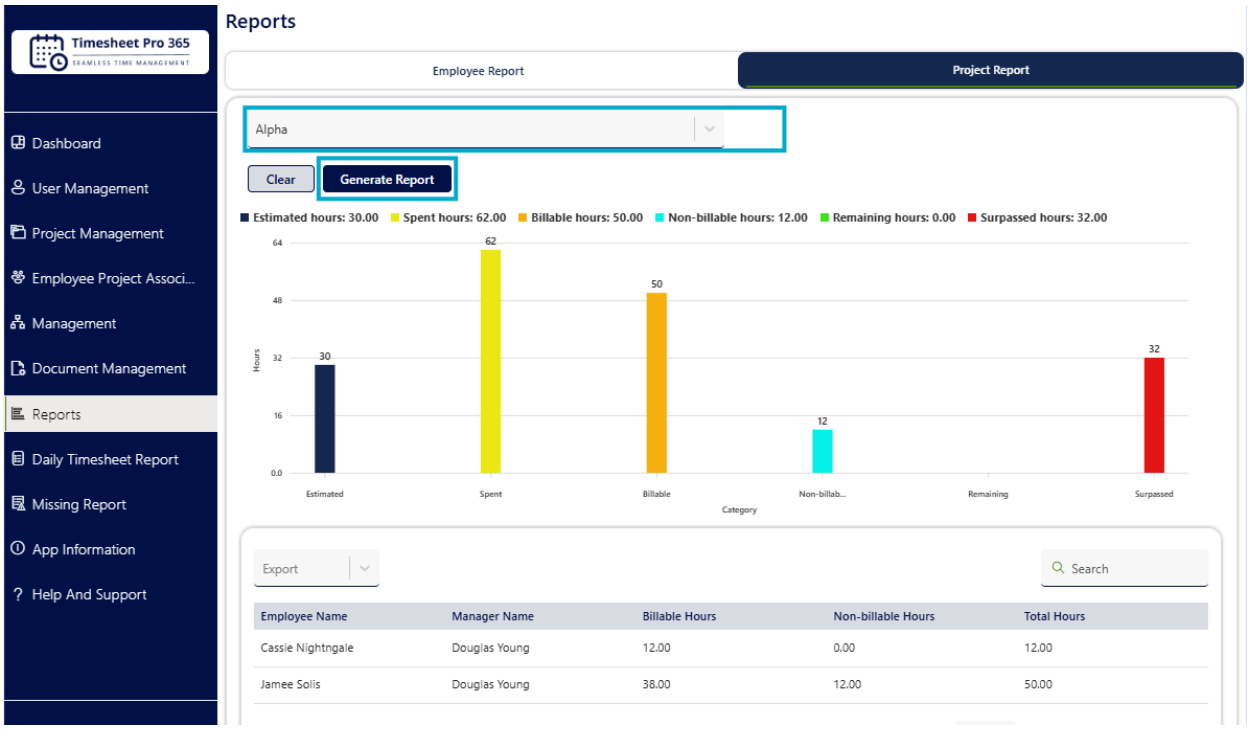
Exporting Reports:
When exporting reports, you can also filter by timesheet status. Ensure you select the required status filter as needed.

Grid View: Reports will be displayed in a grid format according to the selected filters.



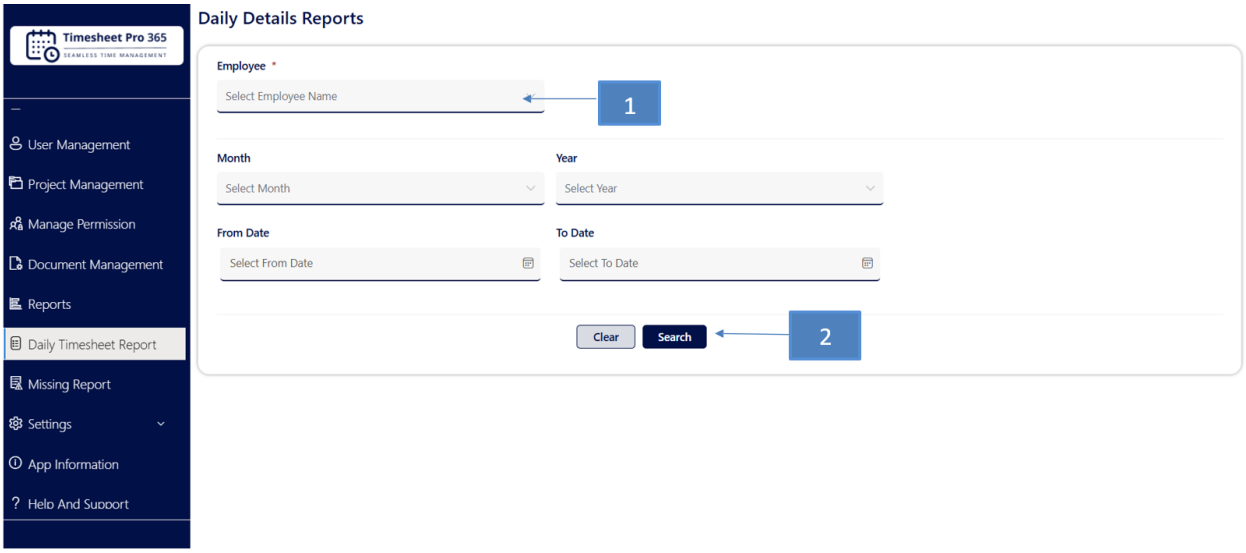
Project Report:

1. Admins and Managers can select a Project from the dropdown.
2. On clicking "Generate Report," Admins and Managers can view a detailed breakdown of categorized hours spent on the selected project.



Daily Timesheet Report

1. **Available Filters:** Within the Daily Timesheet Reports section, you can filter by Employee, Month, Year, From Date, and To Date.
2. **Generating Reports:** After selecting the desired filters, click the Search button to generate the report.



Missing Report

The **Missing Report** section helps track employees who have missed submitting their timesheets for any week. Only **Admin** and **Manager** users can access this section to view missing timesheets and send notifications to ensure timely submission.

Accessing the Missing Report

1. Log in to the system as an **Admin** or **Manager**.
2. Navigate to the **Missing Report** section from the menu.
3. Use the **Employee** filter dropdown to select one or multiple employees.
4. Click the **Search** button to generate the missing timesheet report for the selected employees.

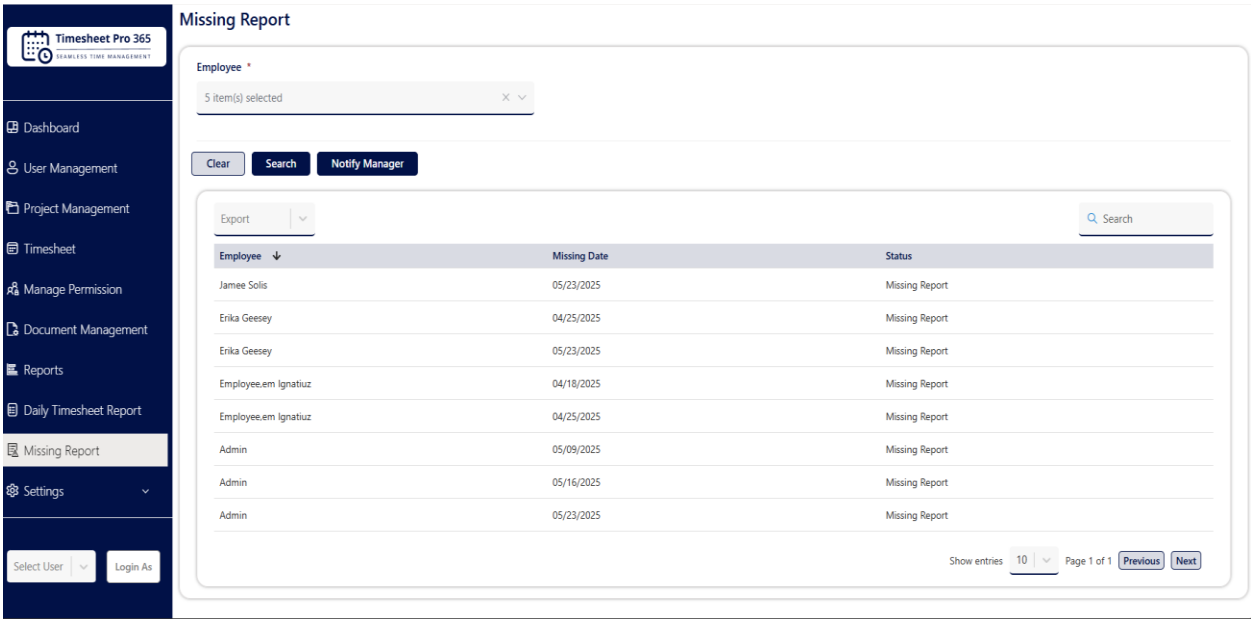
Sending Notifications for Missing Timesheets

To keep relevant users informed about missing timesheets for the last 3 months, Admins and Managers can send notification emails:

1. Notify Manager (Admin only)

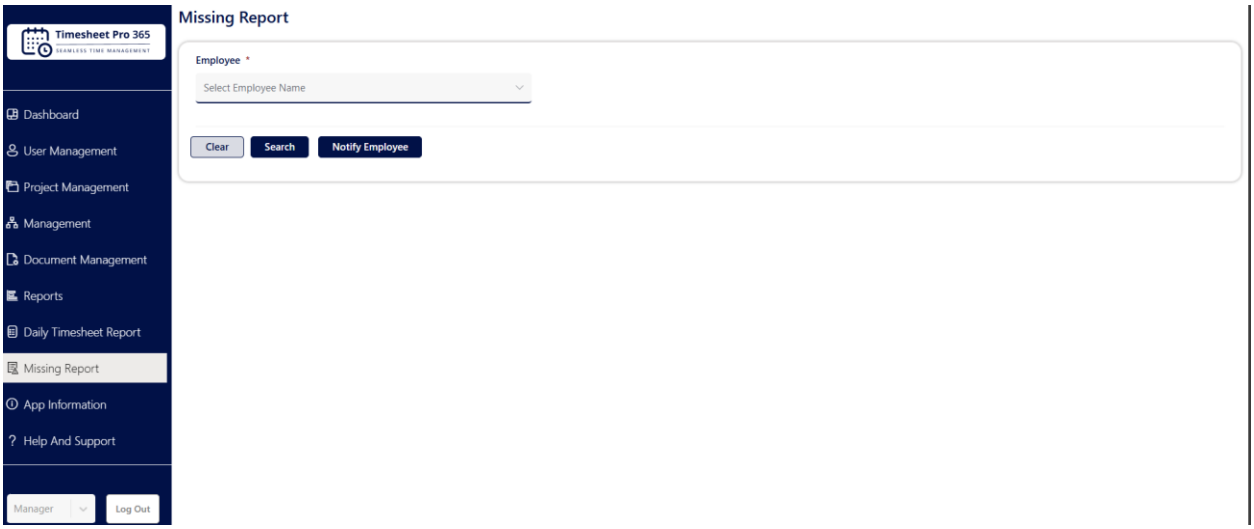
1. Select one or more employees from the dropdown.
2. Click the **Notify Manager** button.
3. The system will send an email notification to the respective **managers** of the selected employees.
4. The email will include:

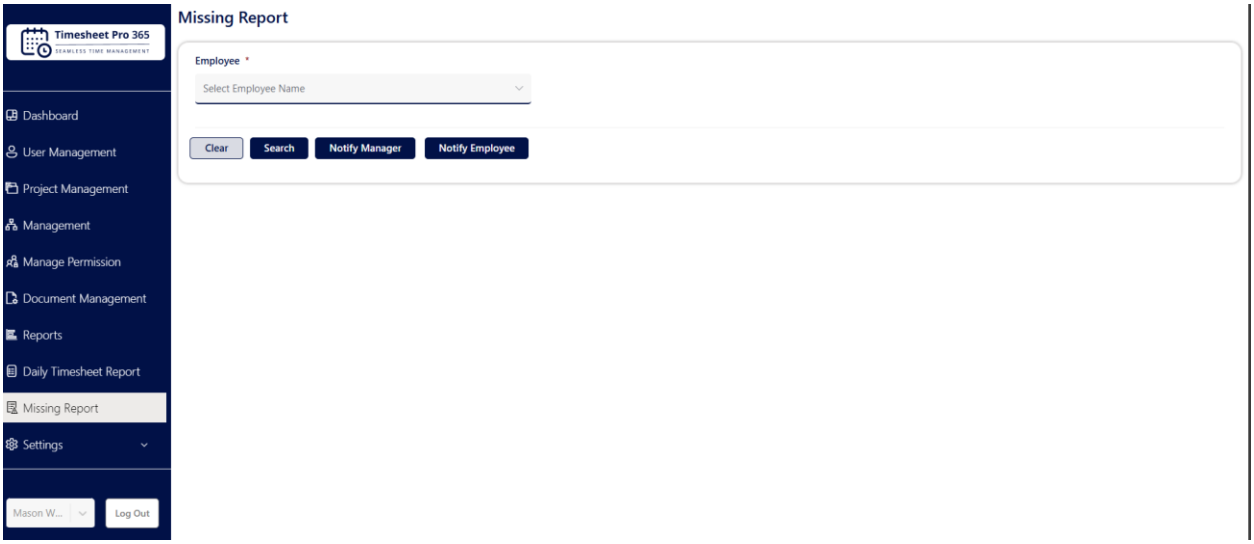
    - Names of the selected employees.
    - The week-ending dates of the missing timesheets within the last 3 months.



2. Notify Employee (Manager only)

1. Select one or more employees from the dropdown.
2. Click the **Notify Employee** button.
3. The system will send an email notification to the selected **employees**.
4. The email will include the week-ending dates of their missing timesheets from the last 3 months.


Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Management
Document Management
Reports
Daily Timesheet Report
Missing Report
App Information
Help And Support
Manager
Log Out
Missing Report
Employee *
Select Employee Name
Clear
Search
Notify Employee


Timesheet Pro 365
SEAMLESS TIME MANAGEMENT
Dashboard
User Management
Project Management
Management
Manage Permission
Document Management
Reports
Daily Timesheet Report
Missing Report
Settings
Mason W...
Log Out
Missing Report
Employee *
Select Employee Name
Clear
Search
Notify Manager
Notify Employee

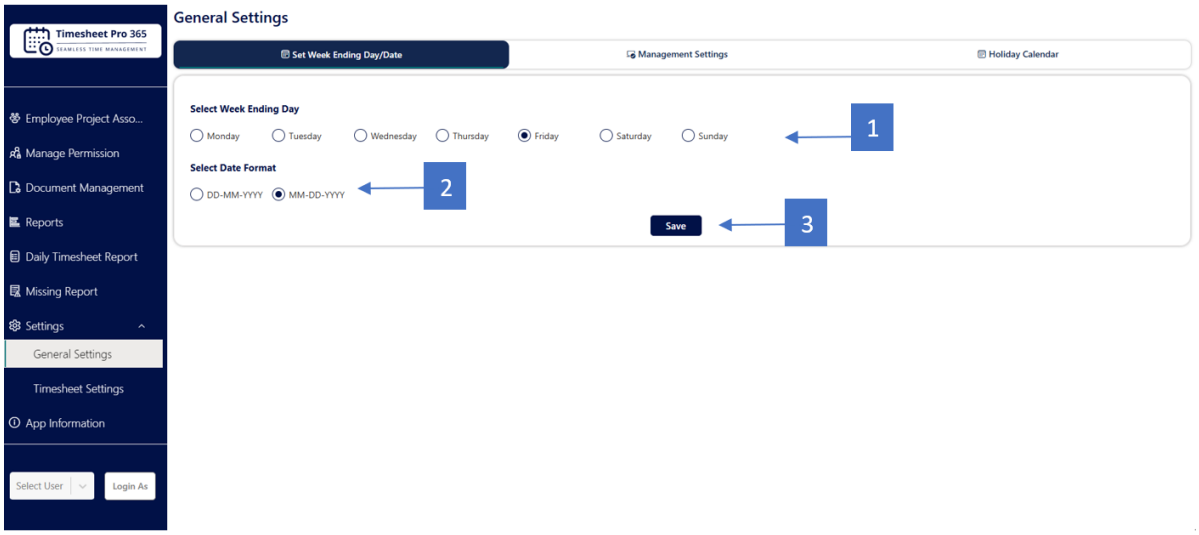
Settings

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.

General Settings

Set Week Ending Day/Date

1. Select weekending date.
2. Select the Date format.
3. Click on the Save Button.



Management Setting

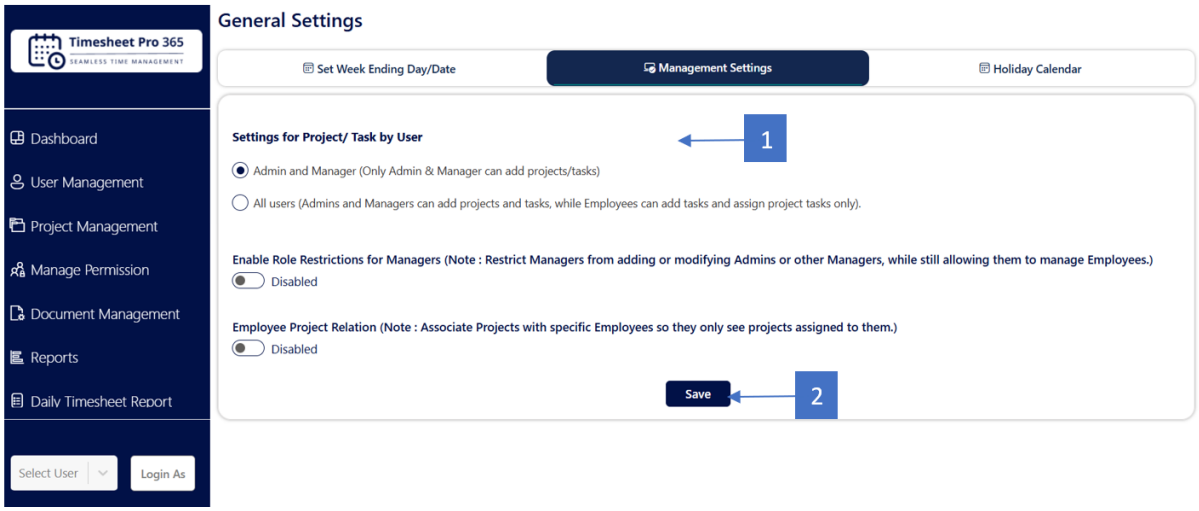
Settings for Project/ Task by User

This setting controls who can add projects and tasks within the application. By default, all users have certain permissions, but admins can restrict task and project creation capabilities for employees.

1. 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.

2. Click on save once the selection is done.

3. 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.

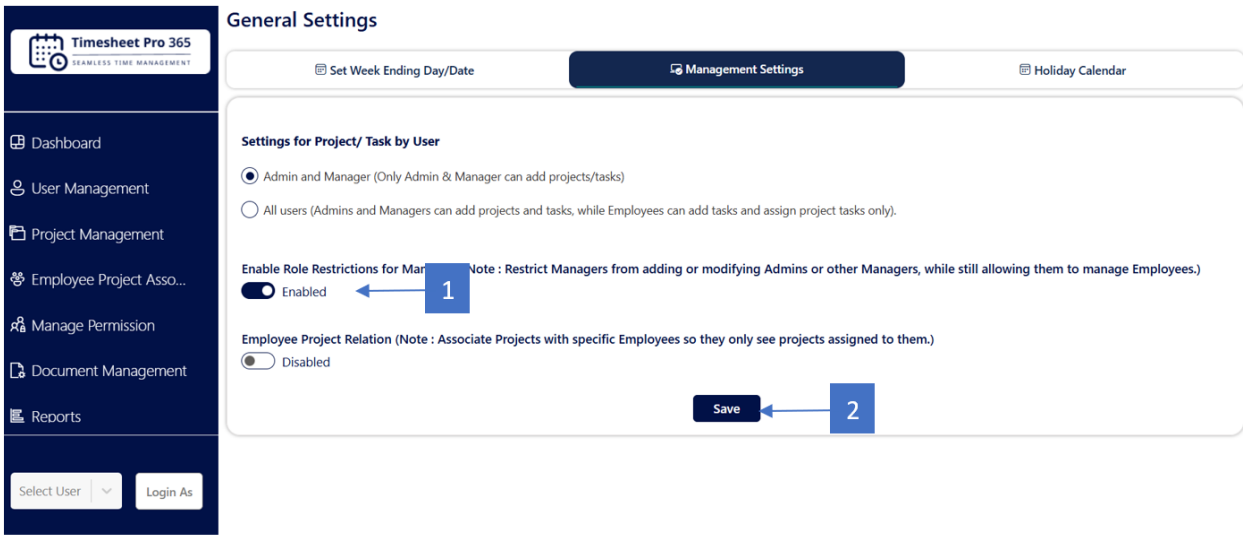


Enable User Management Access

The **Enable User Management Access** toggle controls the level of access managers have within the User Management module concerning admin and manager user permissions.

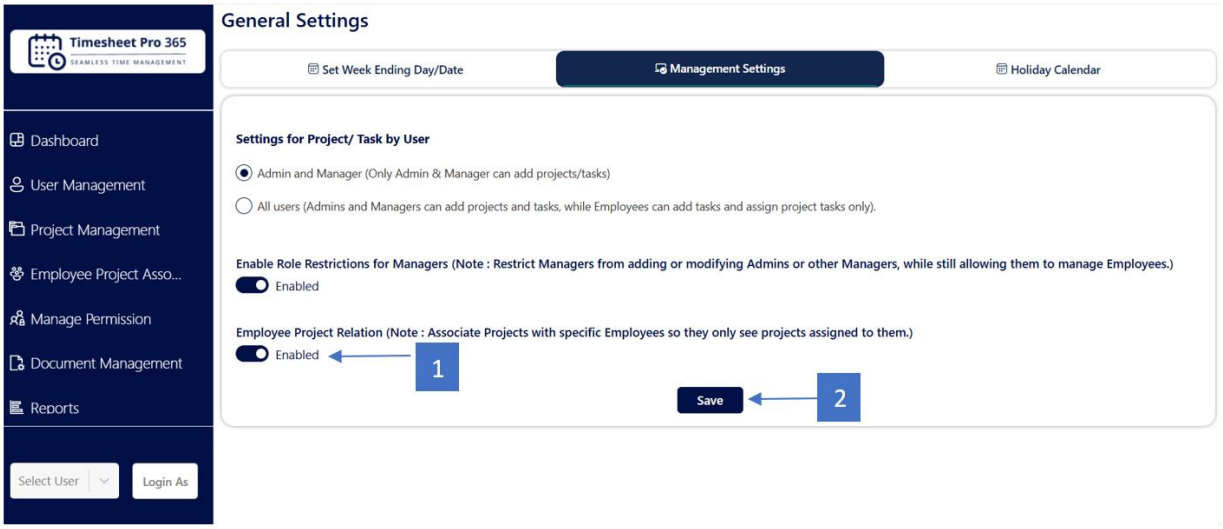
- **When Disabled:**
  Managers can modify user access rights for any admin or manager in the system. This broad permission may lead to potential security risks due to unrestricted access.
- **When Enabled:**
  Managers can only manage user access for employees specifically assigned to them. This restriction enhances security by limiting user management capabilities to direct reports.

Even when this toggle is enabled, managers **can add new employees** to the system.



Employee Project Association

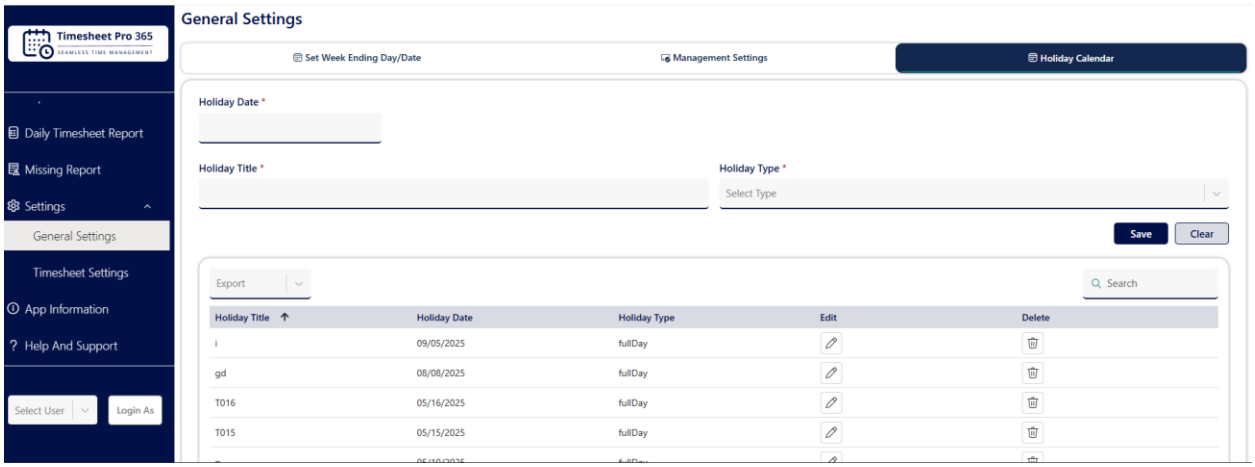
When the **Employee Project Relation** toggle is enabled under **General Settings → Management Settings**, Admin and Manager users gain access to assign projects to employees.



Holiday Calendar Settings

1. A new Holiday Calendar tab is added under the **General Settings** menu for admin access.

2. Admins can add, edit, or delete holidays using a simple form connected to a SharePoint list. The form includes fields for **Date**, **Holiday Title**, and **Holiday Type**.
3. Admins can **save** the holiday to the SharePoint list or **clear** the form to reset fields.
4. Below the form, a **DataTable** displays all holidays fetched from the SharePoint list, showing **Holiday Title**, **Date**, **Type**, and options to **Edit** or **Delete** each entry.
5. Clicking the **Edit** icon loads the holiday data into the form for updating; saving updates the record in the SharePoint list.
6. Clicking the **Delete** icon removes the holiday from the SharePoint list and updates the DataTable.
7. On the **Timesheet** page, when users enter hours on a holiday date, a tooltip appears showing the holiday name followed by the word "holiday," alerting users that the selected date is a holiday.



Timesheet Settings

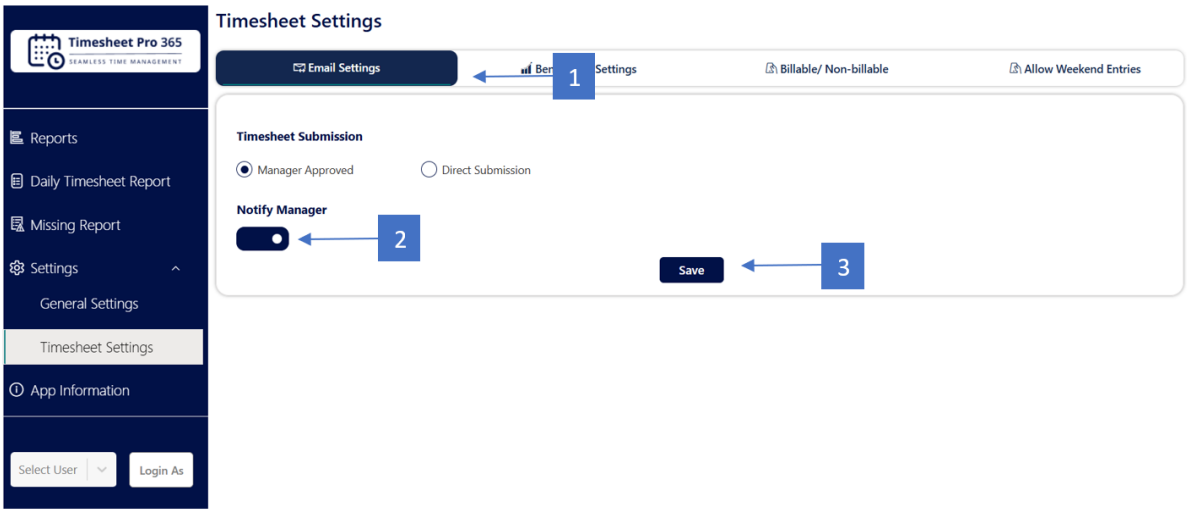
Email Settings

In the Timesheet Email Settings, you can configure how timesheet submissions are handled and notifications sent:

1. Choose whether timesheets require manager approval before submission or allow direct submission.

2. Enable this toggle to send an email notification to the manager for timesheet submissions or approvals.

3. Tap this button to save your changes to the timesheet email settings.



Benchmark Settings

The **Benchmark Settings** feature in Timesheet Pro 365 allows the admin to enforce daily hour limits on employee timesheets. This ensures accurate and consistent time logging by setting minimum and maximum thresholds for daily hours.

1. To make any changes to the benchmark settings, first tap the **Edit** button.

2. Benchmark **Minimum On/Off Toggle**

- Use this toggle switch to enable or disable the **Benchmark Daily Minimum Hours** setting.
- When turned **ON**, employees must log at least the minimum number of hours specified each day.
- When turned **OFF**, there will be no minimum daily hours restriction.

3. **Benchmark Daily Maximum Hours**

- Enter the maximum number of hours an employee can log daily.
- For example, if set to **10**, employees cannot log more than 10 hours in their timesheets for any single day.
- If the employee tries to exceed this limit, a validation error will be triggered.

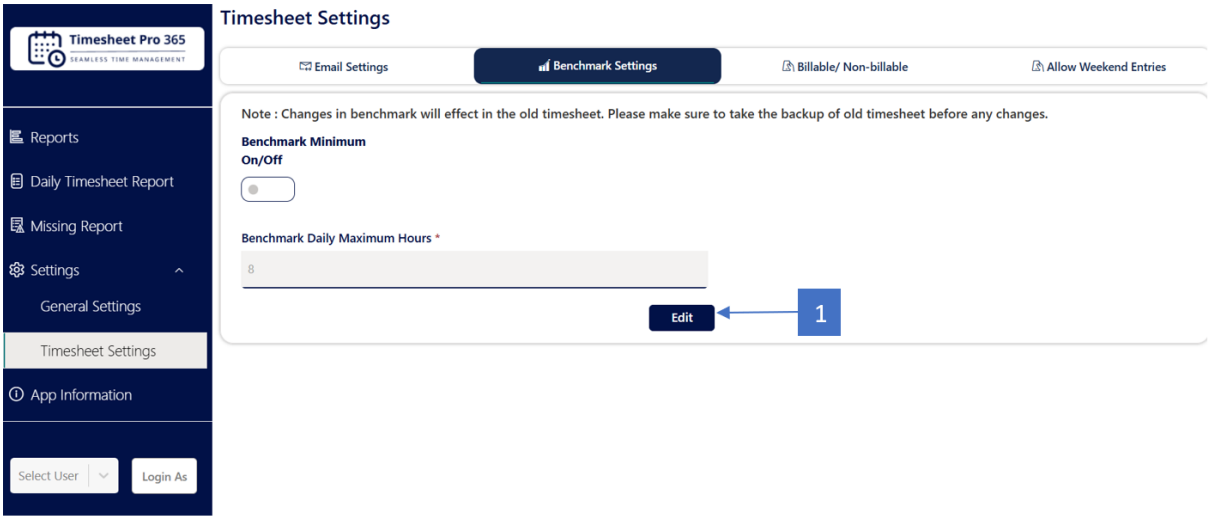
4. **Benchmark Daily Minimum Hours**

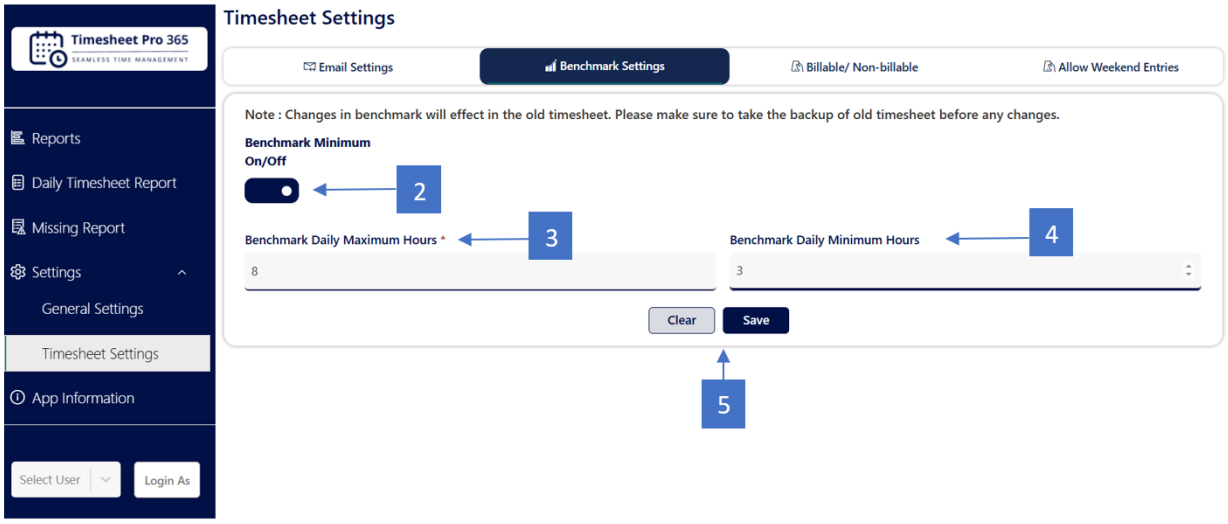
- Enter the minimum number of hours an employee must log per day (this is effective only if the minimum benchmark is enabled).
- For example, if set to **4**, employees must log at least 4 hours daily.

- Entries below this minimum will trigger a validation error to ensure employees log sufficient time.

5. **Save and Clear Buttons**

- After configuring the desired benchmark settings, click the **Save** button to apply the changes.
- Click clear to reset all values.
- **Note:** Changes to benchmark settings will affect existing timesheets. It is highly recommended to backup old timesheet data before making any changes to avoid data loss or discrepancies.





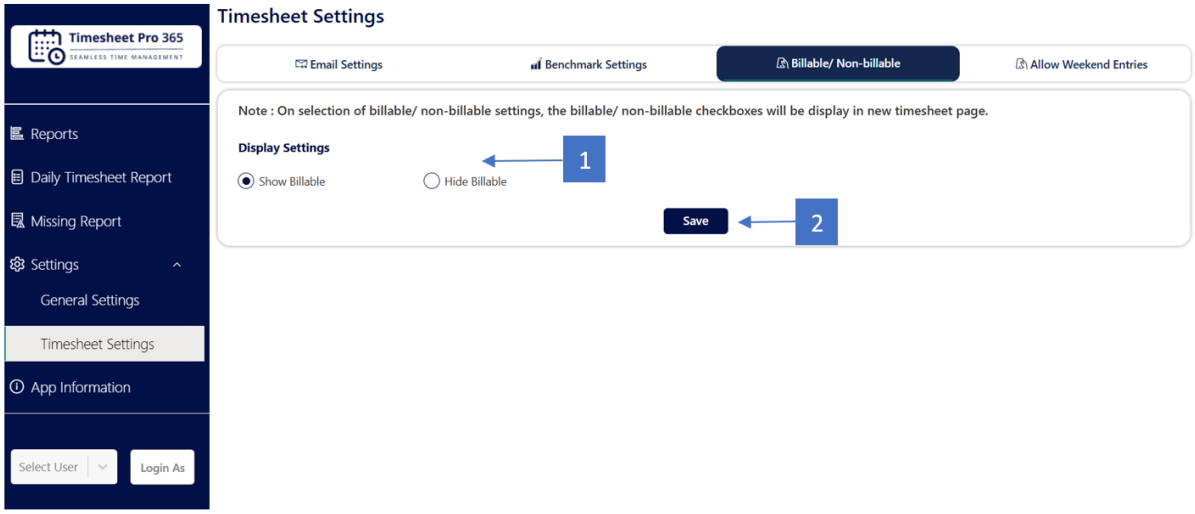
Billable/Non-Billable Setting

When you select an option, the billable/non-billable checkboxes will appear or disappear on new timesheet pages accordingly.

1. Billable Checkbox Display Options:

- **Show Billable:** Enables the Billable checkbox on timesheets, allowing users to mark hours as billable or non-billable.
- **Hide Billable:** Removes the Billable checkbox from timesheets, preventing users from marking billable hours.

2. Save Settings: Click **Save** to apply your selection. This setting will affect all new timesheet entries going forward.



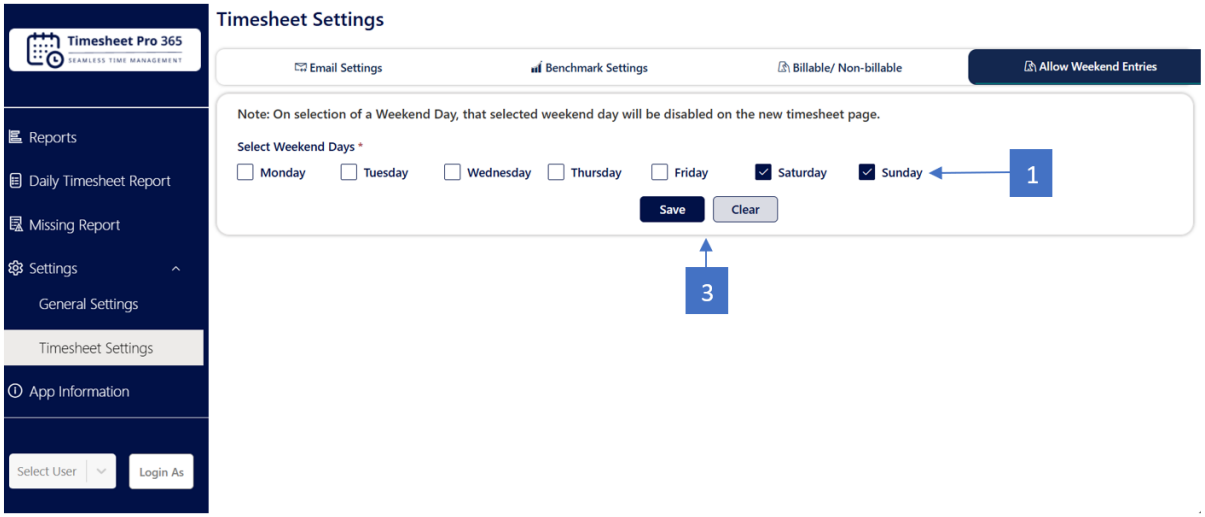
Allow Weekend Entries

The Weekend Time Entry Settings feature in Timesheet Pro 365 allows the admin to control which weekend days employees are permitted to log time. This helps enforce organizational policies by disabling time entries on selected weekend days.

1. **Select Weekend Days**
   - Use the checkboxes to select which days of the week are considered weekend days.
   - For example, selecting **Saturday** and **Sunday** marks these as weekend days where time entry will be restricted.
2. **Effect of Selection**

- When a weekend day is selected, that day will be **disabled** for time entry on the **New Timesheet** page.
- Employees will **not be able to log hours** for these disabled weekend days in their timesheets.

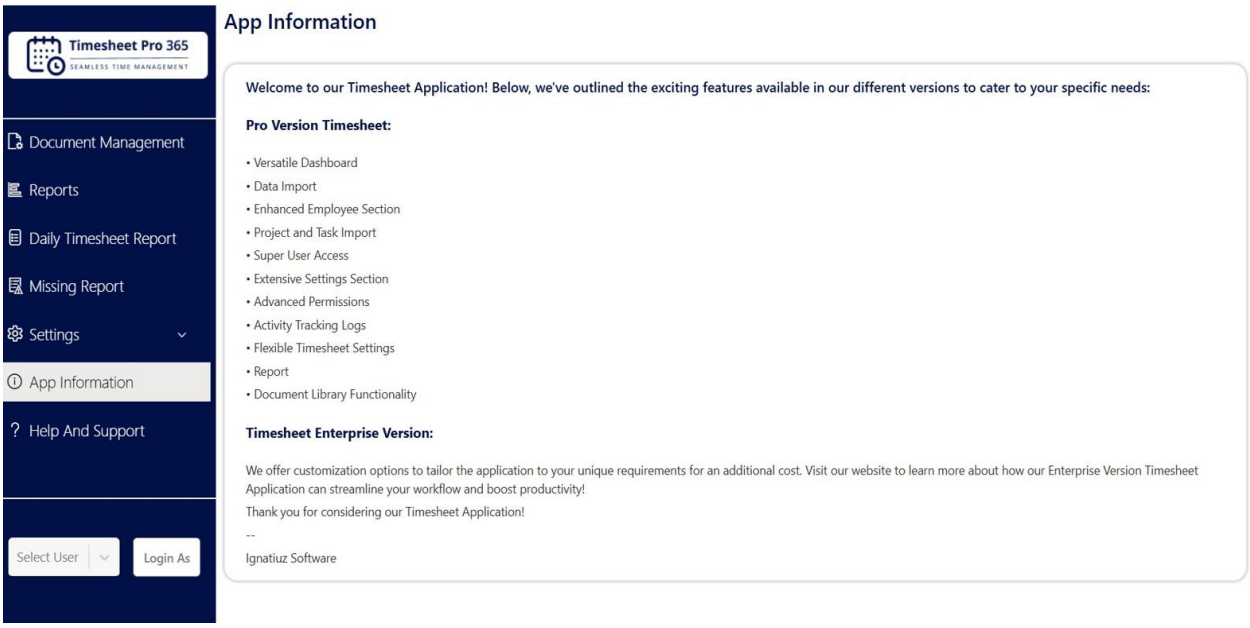
3. **Save and Clear Buttons**
   - Click **Save** to apply the selected weekend day settings.
   - Click **Clear** to reset all selected days to none.
4. **Note**
   - This setting enforces weekend work policies by preventing timesheet submissions on designated weekend days.



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



1. **FAQs**

    - Visit the **Frequently Asked Questions (FAQ)** section to find quick answers to common questions related to using the application.

2. **User Manual Link**

- For a more comprehensive guide on using the Microsoft 365 Timesheet (Office and SharePoint App), refer to our detailed **User Manual**.
- Click the link for more detailed instructions on how to use the app.

3. **Contact Support**

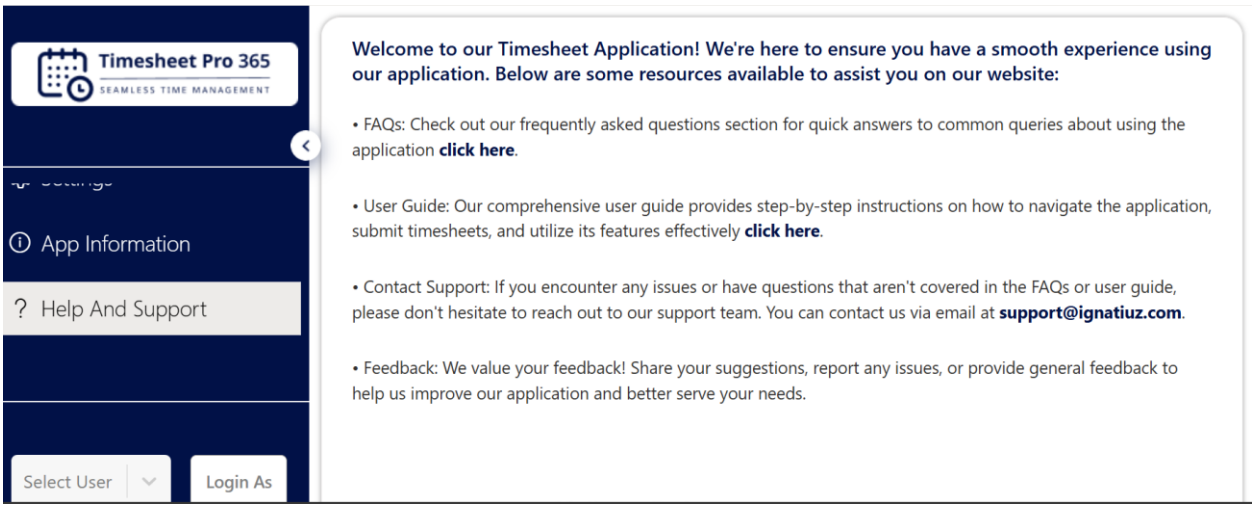
    - If you encounter any issues with configuration, access, or other difficulties, visit our **client support portal** for personalized assistance.
    - For any questions or issues with the application, please reach out through our **Client Support Portal**.

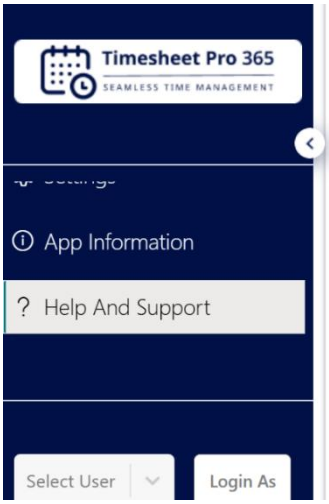
4. **Feedback**

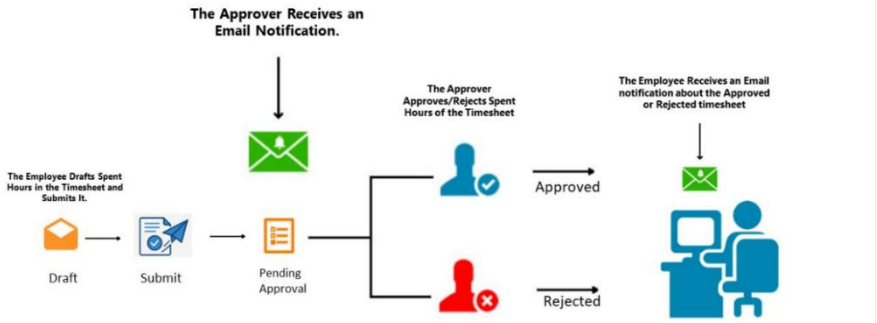
    - We truly value your feedback! Please share your suggestions, report any issues, or provide general feedback to help us improve the application and better meet your needs.

Help and Support

We are committed to providing you with a seamless and efficient experience while using our Timesheet Application. Below are several resources to assist you







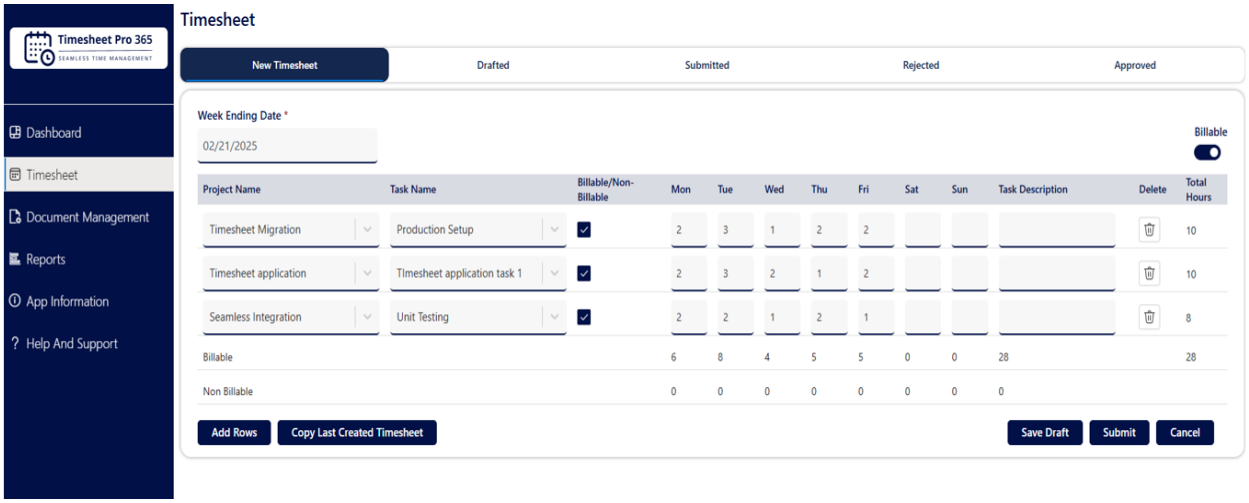
Create New Timesheet

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

1. Click on the Week ending date text box to open the calendar.
2. Select the week-ending date from the calendar.
3. If the billable toggle is enabled, all checkboxes will be selected; if disabled, all checkboxes will be unselected.
4. Select the Project from the project dropdown.
5. If there are many tasks associated with the project, enter the project and task name in the search box for easy selection.
6. Select the Task from the task dropdown.
7. The Billable and Nonbillable sections will show the total hours added for each day.
8. Add the number of hours spent on the task for each day of the week.
9. Add descriptions/comments if needed in the description box.
10. Click on the **Add rows** button to add new rows if required.
11. Click Copy Last Created Timesheet to view the last created timesheet.

12. Click **Save draft** to save the data and allow editing the timesheet later.

New Timesheet

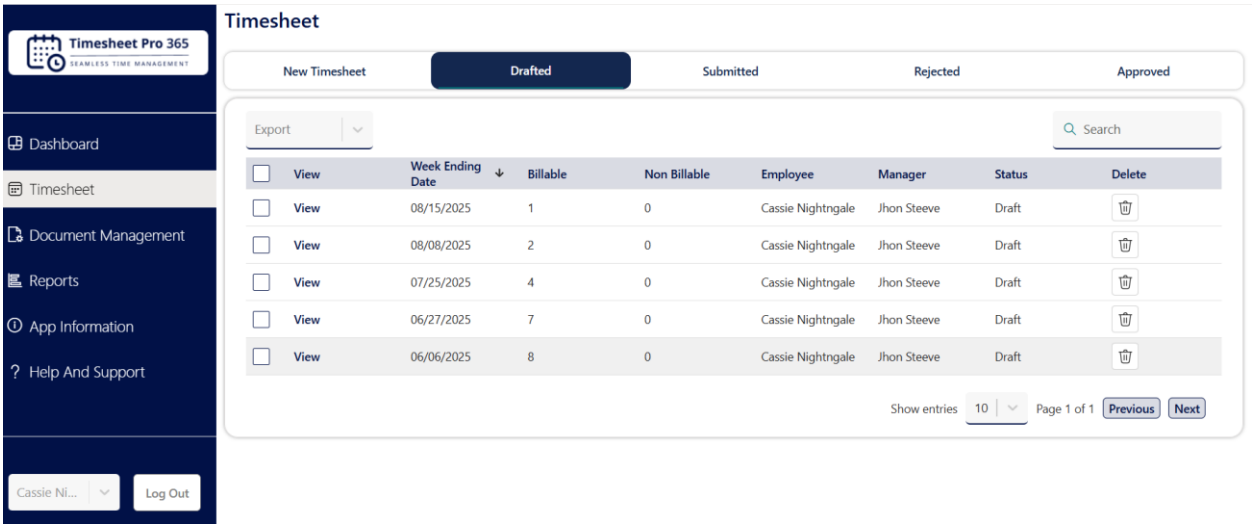


If the Employee Project Association toggle is turned on, the employee will only be able to see their own projects; otherwise, all projects will be visible in the Project Name dropdown.

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

1. Drafted: Can view draft timesheets and modify them again.
2. Submitted: Displays all submitted Timesheets.
3. Rejected: Shows all timesheets rejected by the manager.
4. Approved: Shows all timesheets approved by the manager.

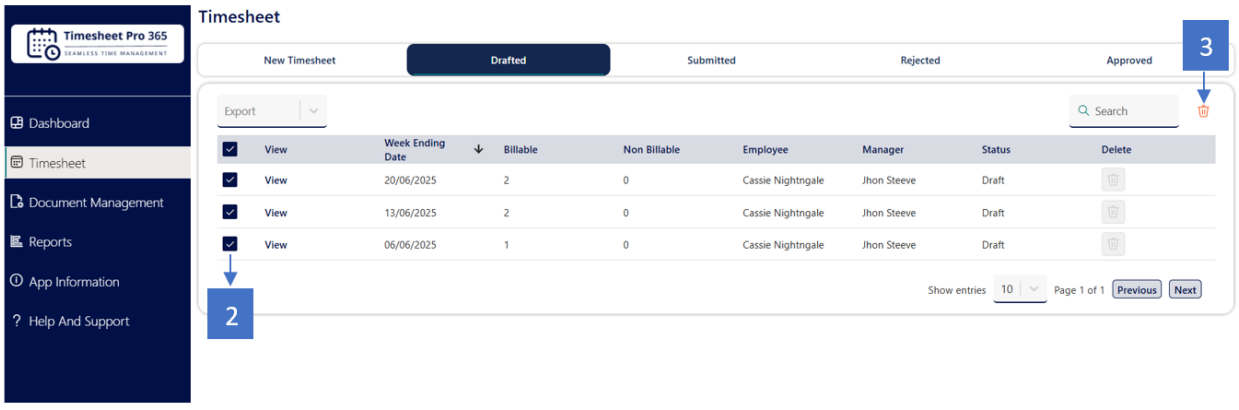
Drafted Timesheets



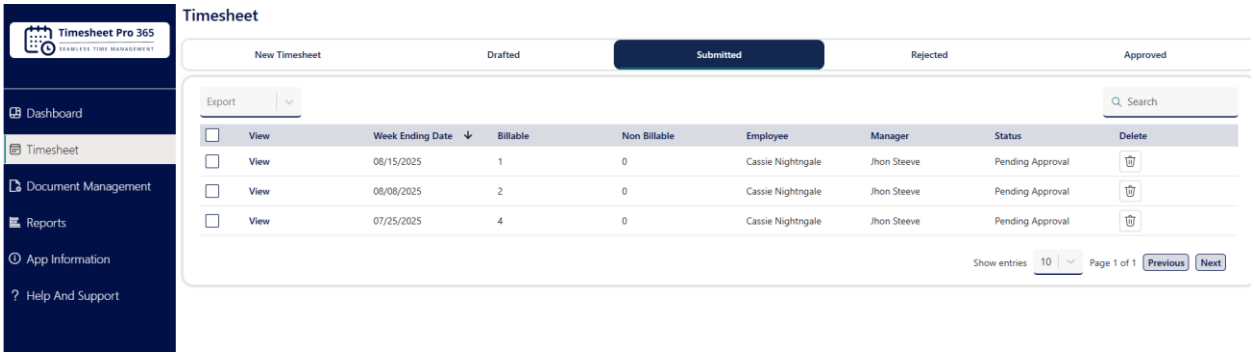
Bulk Delete for Drafted Timesheets

The Bulk Delete feature in Draft Timesheets allows employees to remove multiple timesheets at once efficiently.

1. Navigate to the **Timesheet** section.
2. In the timesheet list, select the checkboxes for **two or more** timesheets you wish to delete. Once multiple timesheets are selected, the **Bulk Delete option** will appear at the top-right corner of the list.
3. Click the **Bulk Delete option** to remove all selected timesheets and confirm the deletion in the pop-up dialog to complete the process.



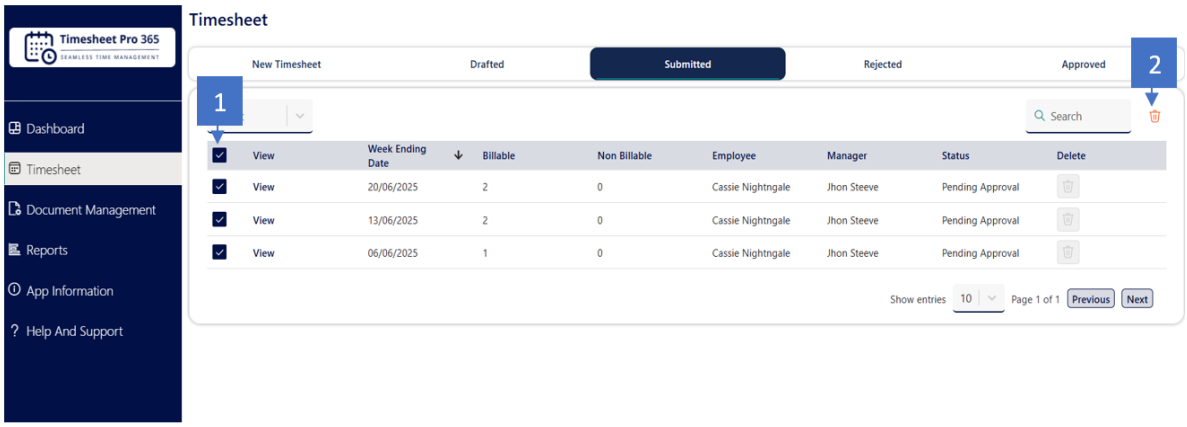
Submitted Timesheets



Bulk Delete for Submitted Timesheets

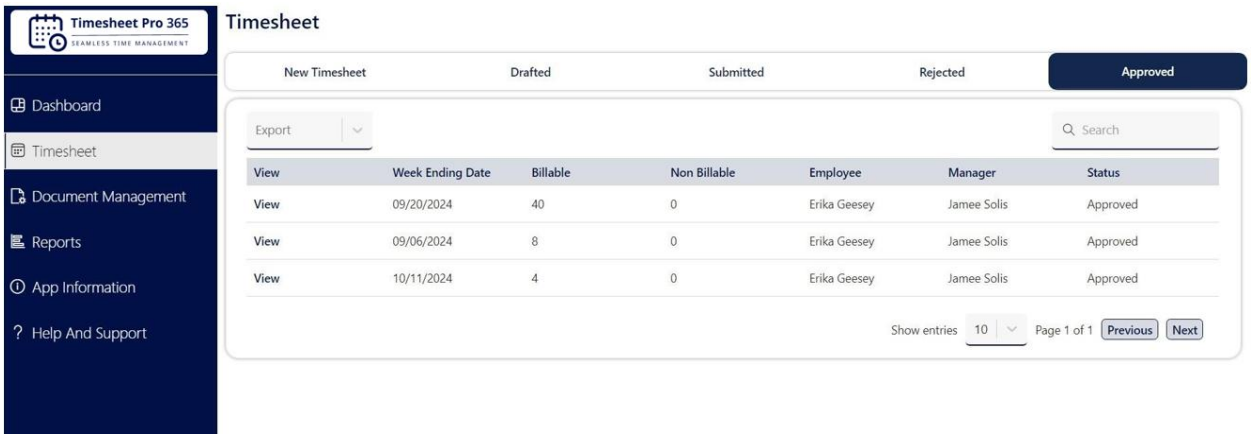
The Bulk Delete feature in Submitted Timesheets allows employees or managers to efficiently delete multiple submitted timesheets if corrections or removals are necessary.

1. Navigate to the **Submitted Timesheets** section. In the list of submitted timesheets, select the checkboxes for **two or more** timesheets you want to delete.
2. Once multiple timesheets are selected, the **Bulk Delete option** will appear at the top-right corner of the list. Click the **Bulk Delete option** to delete all selected timesheets.
3. Confirm the deletion in the pop-up dialog to complete the process.



Rejected Timesheets

Approved Timesheets



Management – Approval and Rejection of Timesheet

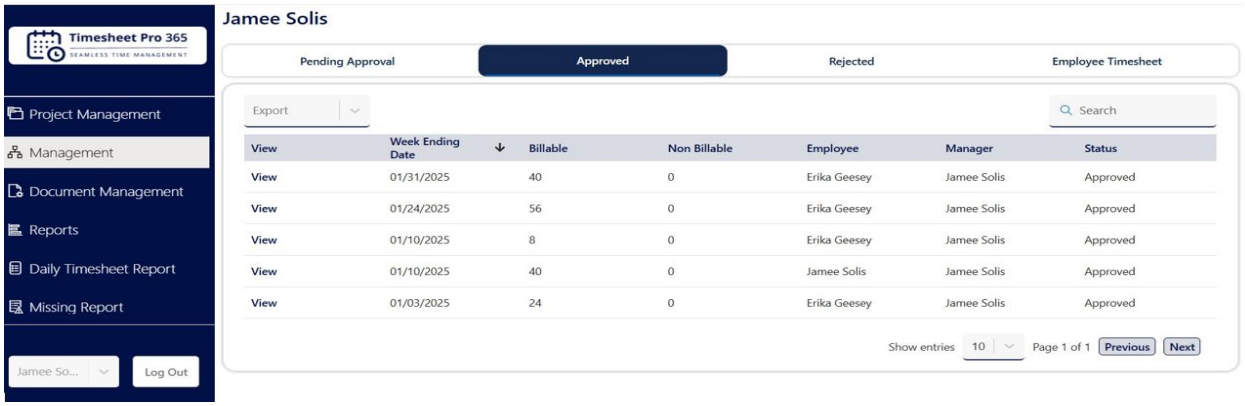
The management portal views all the submitted employee timesheets and their status.
Management - Can see assigned employee-submitted timesheets.

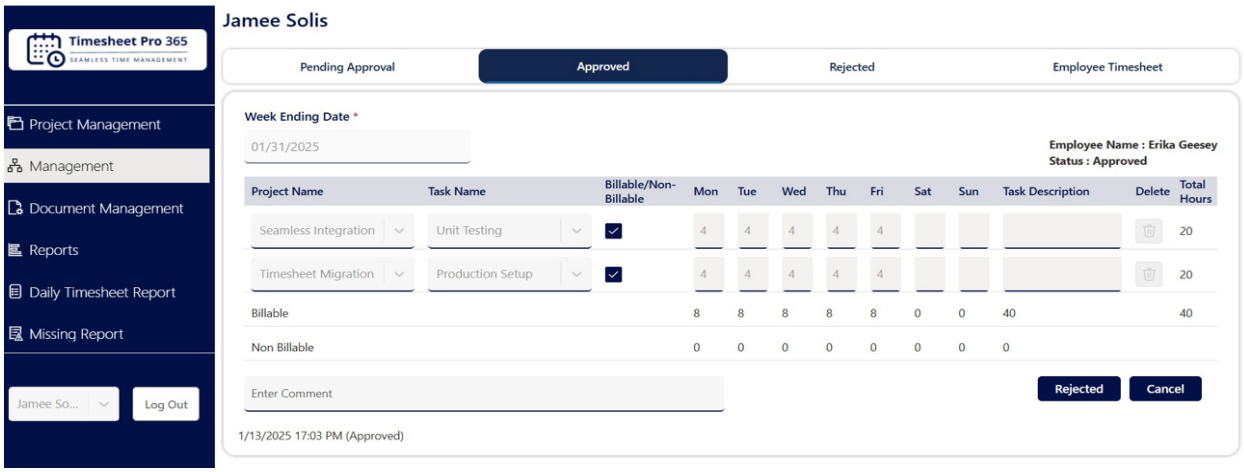
1. Pending – Will show a pending timesheet that is pending approval.
2. Approved– Will show all the approved timesheets.
3. Rejected – Will show all the rejected timesheets.
4. Employee Timesheet – Will show all timesheets of the employee.

Pending Approval

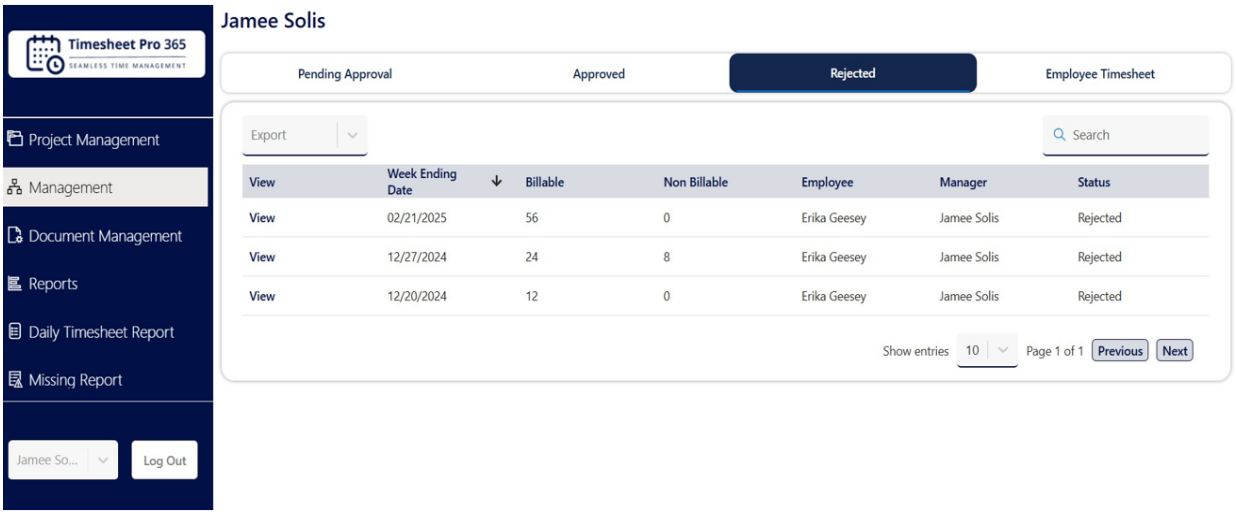
Approved Timesheets

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

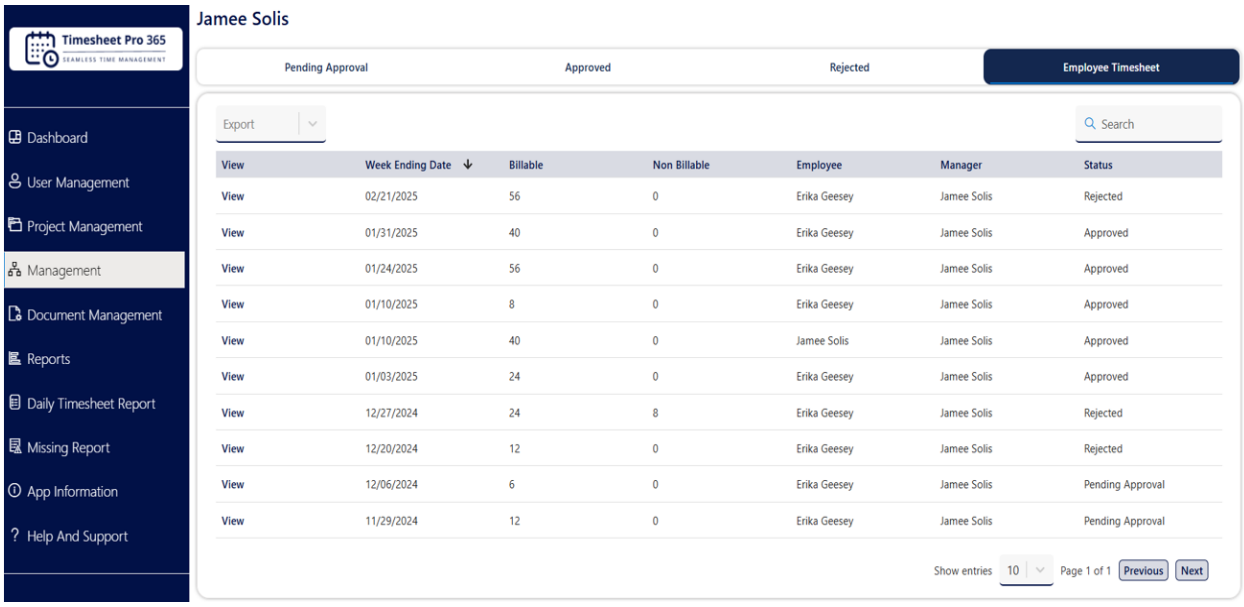




Rejected Timesheets

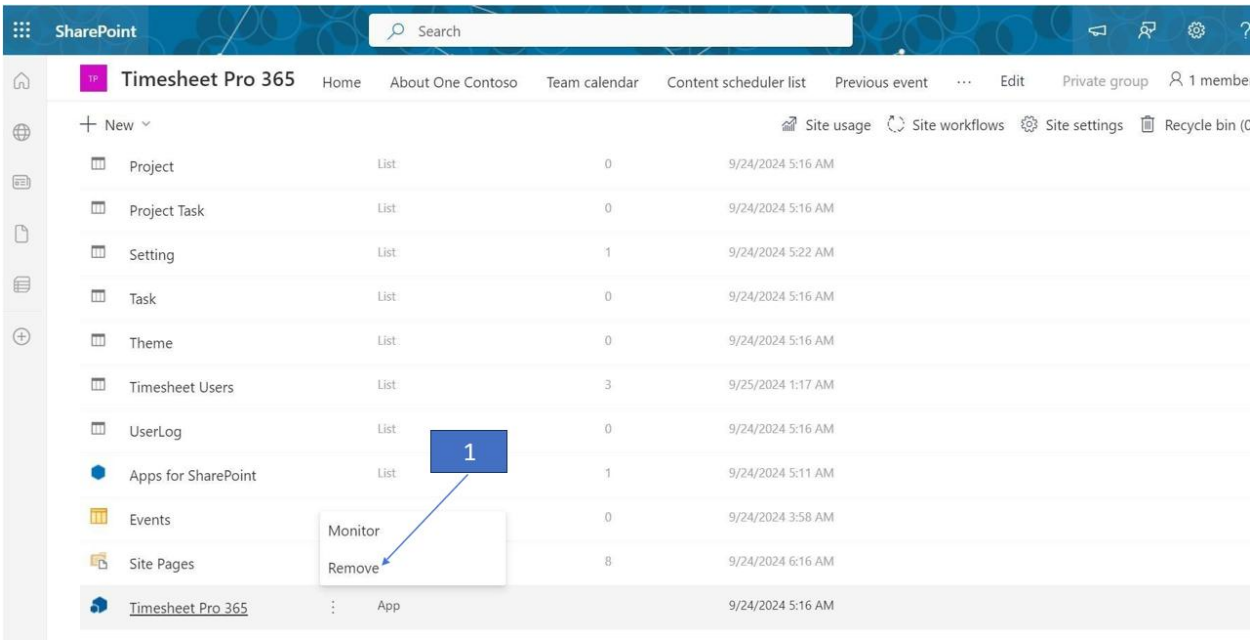


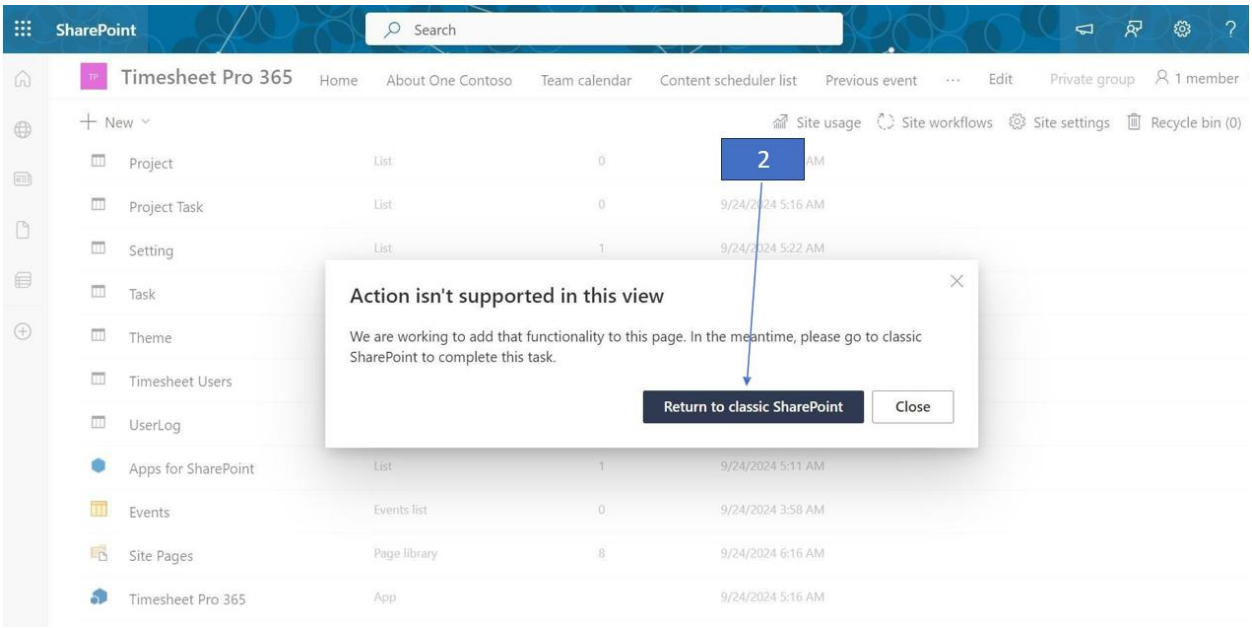
Employee Timesheets



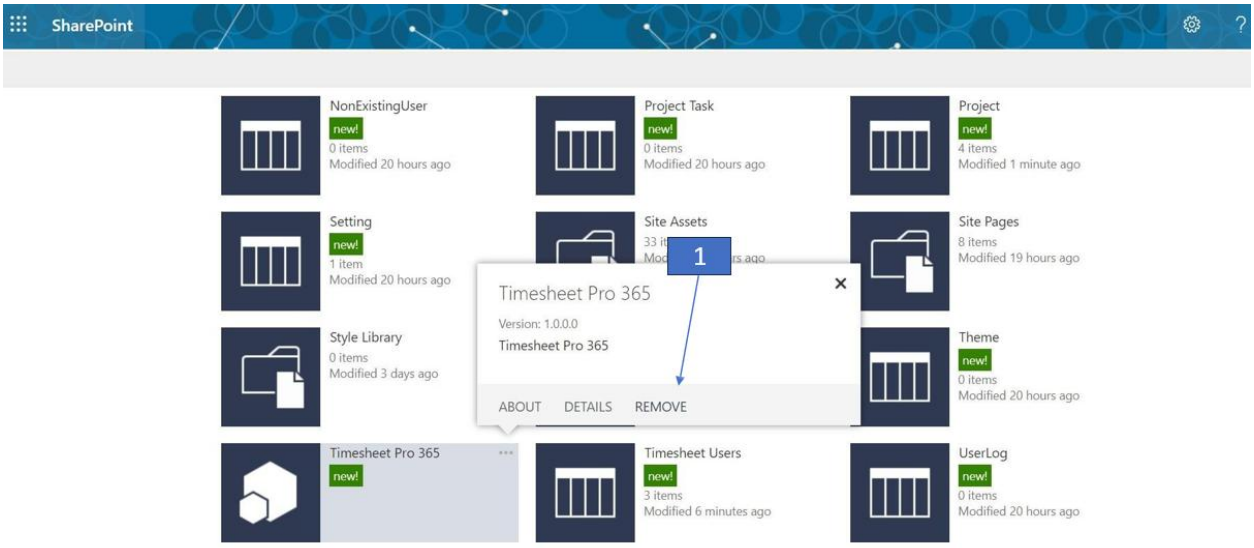
How to delete the application from the site?

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. Applications 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.





7. Find the Timesheet Pro 365 app and click on three dots.
8. Click on three dots.
9. Click on Remove.



Thank You

For Your Attention