# TIME SAVVY MANUAL



# 1. Introduction

Welcome to the TIMESAVVY Timesheet Management Portal, a comprehensive tool for efficient and accurate time tracking. This user manual is designed to guide you through the features and functionalities of the portal, ensuring you make the most of its capabilities.

TIMESAVVY simplifies the process of recording, managing, and analyzing employee work hours. With its intuitive interface, you can easily log hours, fill and fetch timesheets, and generate detailed reports. Our goal is to enhance productivity and streamline your time management processes.

This manual covers everything you need to get started with TIMESAVVY, from initial setup and user account management to advanced reporting and integration with leave management systems. Follow the sections below to familiarize yourself with the portal's features and optimize your time management practices.

# 2. Getting Started

Open the TIMESAVVY website. To log into the TIMESAVVY application, you need to register yourself as an employee of your organization. Follow these steps to get started:

1. **Employee Registration**: Contact your organization's administration to register as an employee. During this process, you will be required to provide the necessary details to set up your profile.

2. **Obtain Your Unique Indxx-ID:** After successful registration, you will be assigned a unique Indxx-ID. This identifier is essential for accessing the portal and can be used for future logins.

3. **Log In to the Application:** Navigate to the TIMESAVVY login page. Enter your unique Indxx-ID along with your credentials to access the portal.

Roles and permissions can be updated later by the administration, allowing you to have the appropriate access level and functionalities as per your job requirements.

# 3. Overview of Features

TIME SAVVY offers a comprehensive suite of features designed to enhance your timesheet management experience. Here's a quick overview of what you can do with TIME SAVVY:

1. **User-Friendly Interface:** Navigate through an intuitive and clean interface that simplifies the time-tracking process.
2. **Accurate Time Logging:** Easily record work hours with precise start and end times, including break periods.
3. **Role Management:** Administrators can assign and update roles and permissions, ensuring employees have access to the relevant features and information.
4. **Comprehensive Reporting:** Generate detailed reports on employee hours and overall productivity by automating the generation of Stoxx and Client Timesheet. Customize reports to meet your specific needs.
5. **Leaves Integration:** Seamlessly integrate timesheet data with your Leave management system for accurate and timely leave management. Includes facilities for filling leaves and applying Comp offs.
6. **Secure Access:** Benefit from robust security measures, including unique Indxx IDs to protect sensitive information.

7. **Support and Helpdesk:** Get assistance when needed with a dedicated support team and comprehensive help resources available within the portal.

These features are designed to help you manage time more effectively, improve productivity, and streamline administrative processes. More detailed explanations are provided in the Using TIME SAVVY section.

# 4. Using TIME SAVVY

## I) Logging into TIME SAVVY

- Open your Web browser.
- Go to the TIME SAVVY website Logging page URL. The following page will appear.


- Login into the application using your unique Indxx ID. (If you don't have the Indxx ID contact the administration and register yourself with the organization to obtain it). Enter your Indxx ID in the space provided.

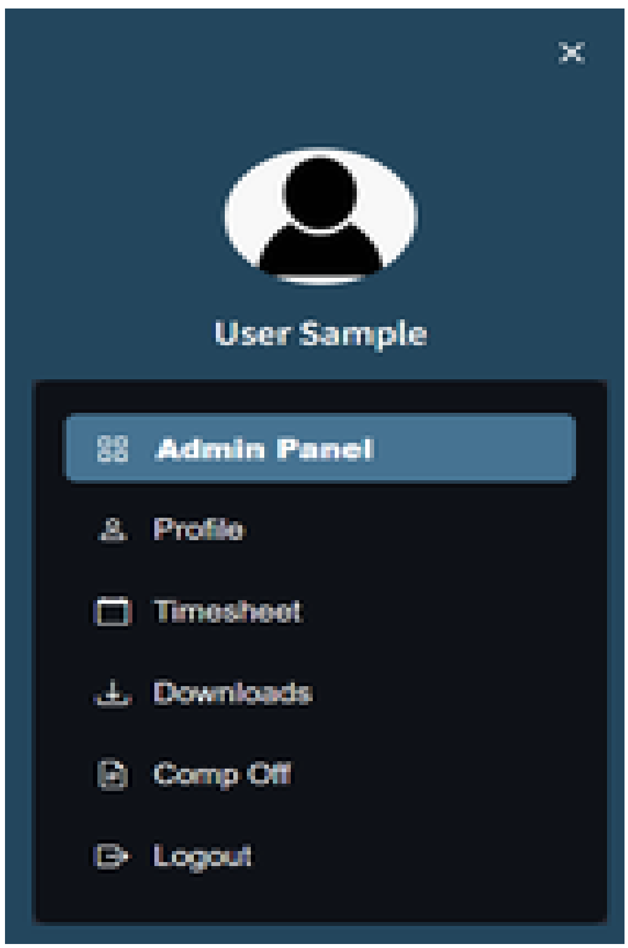
- Click on the login button. This will check if the entered Indxx ID is valid. If the the Indxx ID is not valid then a red error message is displayed indicating to enter a valid Indxx ID. If this happens either a wrong Indxx ID is entered or you are not registered as a member of the organization.


- If Indxx ID is found valid, you will be directed to your Profile page. (Admin Panel in case your role is admin or Super User). You have successfully now logged in to Time Savvy!

# II) User Interface

The User Interface of the application is made in a way to makes it more interactive and easily accessible to the user. Each page of the application is divided into 2 parts: the Sidebar and the Main content Page containing the required webpage as selected in the sidebar.

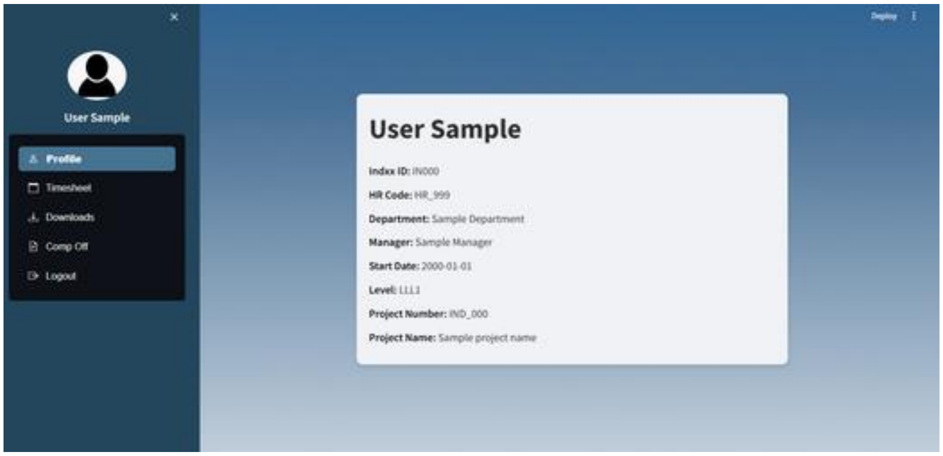
### (i) Sidebar



The sidebar shows all the features and options available to the user at a glance in the application. Users can toggle between various features and use them as per the need. The feature currently opened in the application is highlighted in the sidebar as well. The sidebar contains the following features:

- **Profile:** Displays the profile of the user.
- **Timesheet:** Generates the timesheet of the user for a particular month and date.
- **Downloads:** Allows the user to download their timesheets of the previous or current month as a CSV
- **Comp Off:** Gives facility for the user to avail comp offs for certain dates in the particular month.
- **Logout:** This will take the user out of the Time Savvy application and reset it.
- **Admin Panel:** In case you have been assigned as an Admin or Super user this option is visible at the top of the sidebar. It contains several other features which are explained in the Advance Features Section.

## (ii) Profile Section

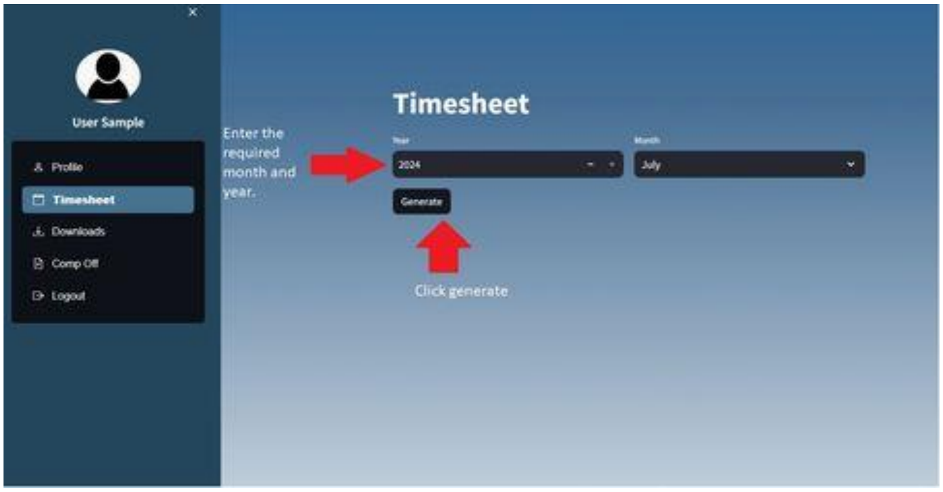



The Profile Page in TIMESAVVY provides a detailed overview of your personal and professional information. As a normal user, you can view the following details:

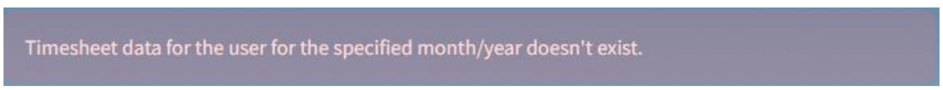
- **Name:** Your full name as registered in the system.
- **Indxx ID:** Your unique identifier within the organization.
- **HR Code:** A code assigned by the HR department for internal tracking.
- **Department:** The department you are currently working in.
- **Manager:** The name of your immediate supervisor or manager.
- **Start Date:** The date you joined the organization.
- **Level:** Your position level within the organization.
- **Project Number and Name:** Details of the project you are currently assigned to.

If you need to update any of this information, please contact your admin or superuser. They have the necessary permissions to make changes to your profile (More in Advance feature section).

## (iii) Timesheet section



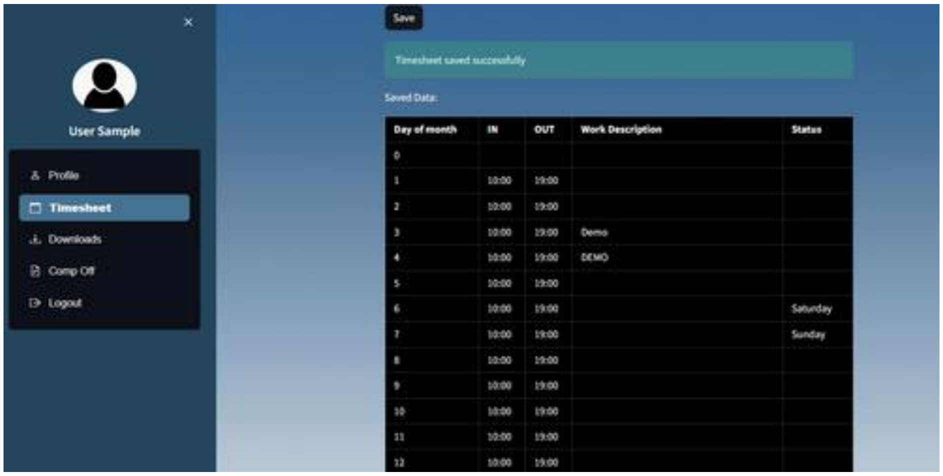

In the timesheet section, Timesheet of the user can be generated corresponding to a specific month and year. There are two boxes that takes month and year as an input and then generates the timesheet for that particular month. If data is not present in the database for that particular month and year then an error message is displayed to the user.




After generating the timesheet user can edit or enter his/her work description corresponding to the day of the month. Zeroth day of month (0) in the top most row is for writing summary of the work done in the whole month.

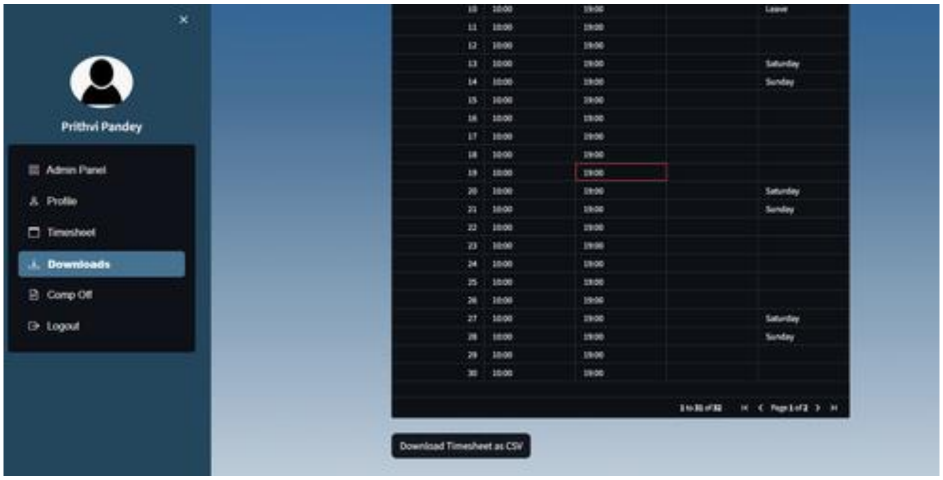

For filling any entry you can just type in the work description column and press enter. You can edit the work description column as many times as you want. To save the changes in the timesheet user has to press the save button at the bottom of the generated timesheet. This will save the timesheet filled in the database by applying all the auto checks and also shows a preview to user about the data stored.

**CAUTION: User has to press the save button in order to save any data filled before switching to another feature. If save button is not pressed all the entries newly filled in the timesheet will be lost!!!**




## (iv) Downloads


This section allows user to download previous timesheets stored at different time of the year. The interface is similar to timesheet section. Enter the month and year for which you want to fetch timesheet. Then click on Fetch timesheet. It will search the data from the database for that particular month and year and displays the timesheet with the Download as CSV button. which when pressed downloads the timesheet as CSV file.




If data is not present in the database then an error message is displayed on the screen.


## (iv) Comp Off


This feature allows user to apply for comp off in case he/she wants to take his/her leaves as comp off. For applying comp off user can enter the duration of days of comp off in the from date and to date entries and then choose status Availed or Not Availed to apply or decline the Comp off. Then just click on submit button. This will ensure that the corresponding entries will be stored in the database to be viewed by the admin or super user. After clicking submit button a success message is shown to the user about the comp off data being saved.

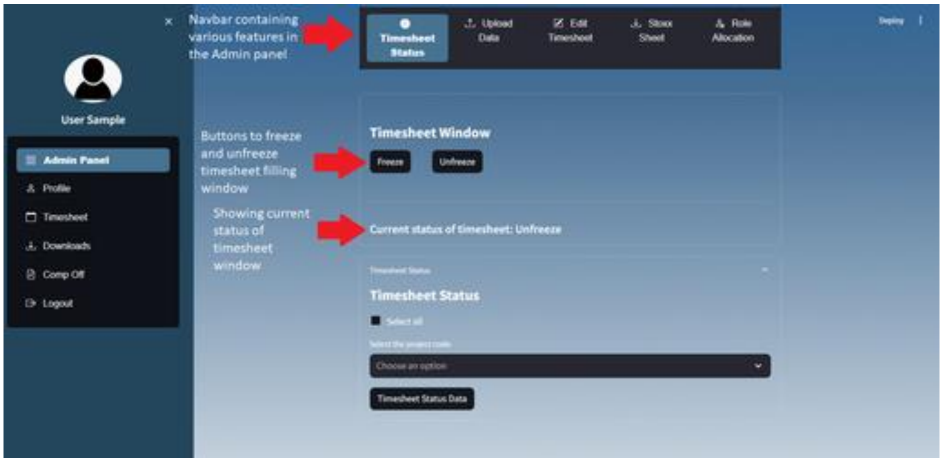
## (v) Advanced feature section

**Admin Panel**

The TIMESAVVY Admin Panel is designed to provide administrators with a comprehensive and intuitive interface for managing user profiles, monitoring system activity, and overseeing project assignments. Administrators have the exclusive ability to update user information, manage HR codes, and ensure accurate tracking of timesheet and project data. The panel includes advanced features such as timesheet status Stoxx sheet generation etc. for analyzing the status of the timesheet work and generating detailed reports of the employees to be sent to the client. With robust security measures in place, the admin panel ensures that all modifications are logged and safeguarded, maintaining the integrity and reliability of the Time Savvy platform.

The Admin panel consists of five features listed on a navigation bar as tabs with the active one highlighted. These features and their functioning are mentioned below:

**a.) Timesheet Status**




This section displays the status of timesheets filled currently. It has two sections:

- **Timesheet Window:**

The Timesheet Window Option feature allows administrators to manage the availability of timesheet entries for all employees by freezing or unfreezing the timesheet functionality. This helps ensure timely submission and review of timesheets.

**Freezing the Timesheet:**

- Administrators can press the "Freeze" button in the timesheet management interface. Navigate to the Timesheet Status section. Press the "Freeze" button to close the timesheet entry period.
- Once the freeze button is pressed, all employees will see a message in their timesheet option stating, **"The timesheet filling window is over."**
- Employees will be unable to enter or modify their timesheets until the timesheet is unfrozen.

- This function is used to close the timesheet entry period, ensuring that no further changes can be made after a specified deadline.

**Unfreezing the Timesheet:**

- **The timesheet automatically unfreezes at the start of every month.** This allows employees to enter their timesheets for the new month without any administrative intervention.
- Administrators also have the option to manually unfreeze the timesheet if needed, allowing employees to make entries or corrections. Navigate to the Timesheet Status section. Press the "Unfreeze" button to reopen the timesheet entry period.

**Normal User View:**

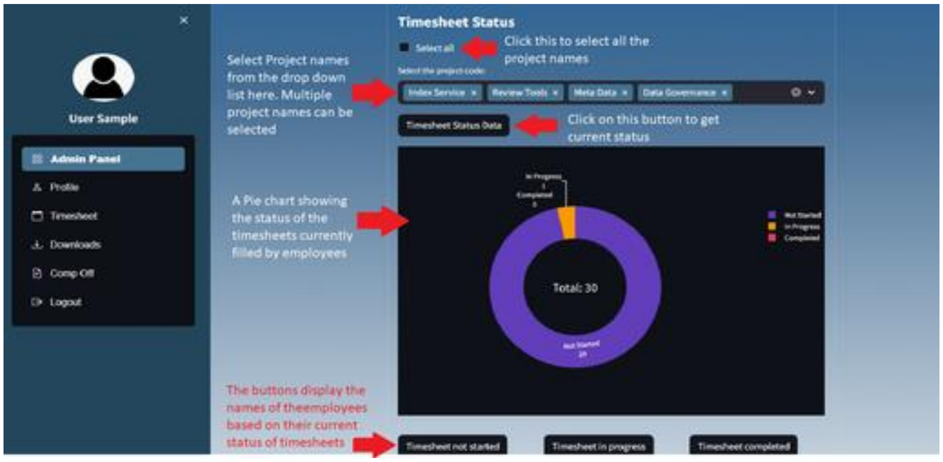

- When the timesheet is frozen, employees will see a message indicating that the timesheet window is over and will be unable to make any entries or changes.
- When the timesheet is unfrozen (either automatically at the start of the month or manually by the administrator), employees can resume entering or modifying their timesheet data.

**Important Notes:**

- Ensure to freeze the timesheet only after verifying that all required entries for the period have been submitted.
- Use the manual unfreeze option judiciously to avoid confusion and maintain accurate timesheet records.

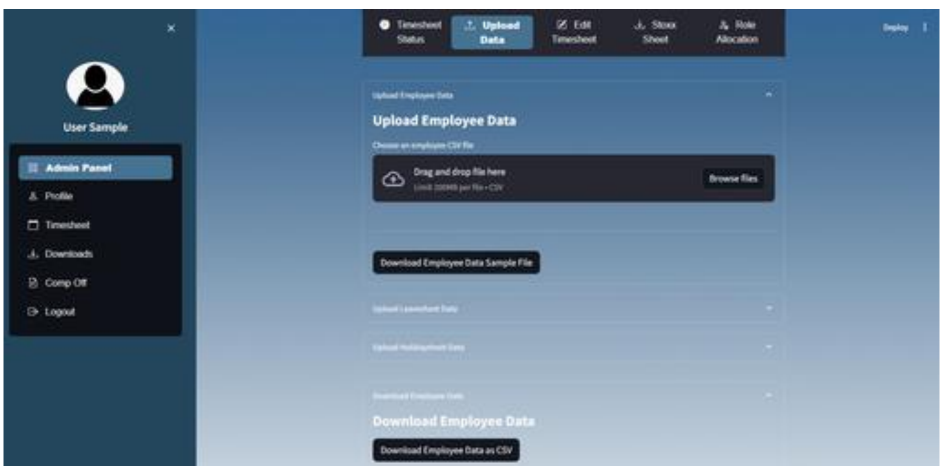
This feature ensures a structured and controlled timesheet management process, aiding in accurate time management.

- **Timesheet Status**




This section provides the details of the current status of the timesheet filled till date. Admin can see the status of the timesheets of all the employees by just selecting project names in the input box and then clicking on Timesheet Status Data. Then a Pie chart is shown displaying the number of employees and their timesheets status. Along with that three buttons are also shown which on clicking also displays the Names of the employees and their corresponding status of the timesheet. Thus this feature gives admin the ability to know the condition of timesheets of the employees.

**b.) Upload Data**

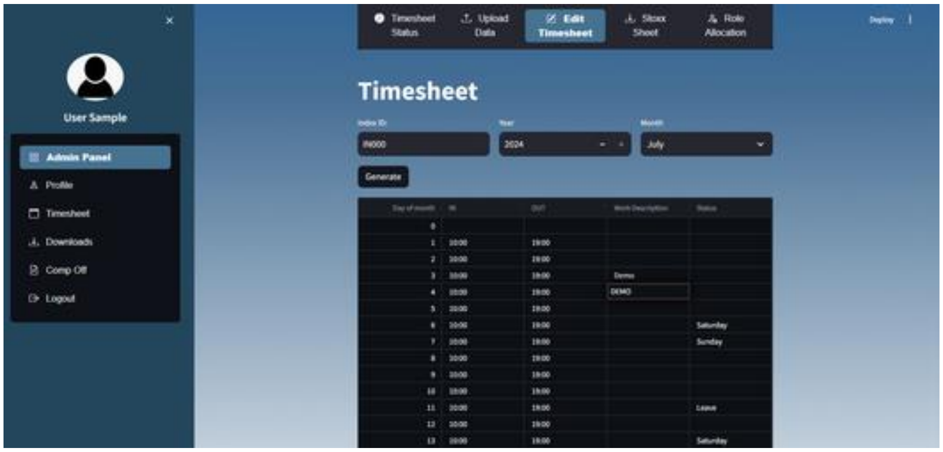



This section allow admins to upload various kinds of data such as Employee data, Leave sheet data and Holiday data. These data are stored in the database and form the core table in it. All the subsequent details are taken and extracted from these tables. Admin can add, edit and remove the employee details from the database. For uploading the data into the database Admin has to select a CSV file from his system by clicking on the Browse files button and then press upload button.

File should be in the specific format as available in the Download Employee Data Sample File. If all the formats are correct and file is successfully uploaded then a success message is shown otherwise an error message is displayed to the Admin. Leave sheet and Holiday data upload also work in the same way.

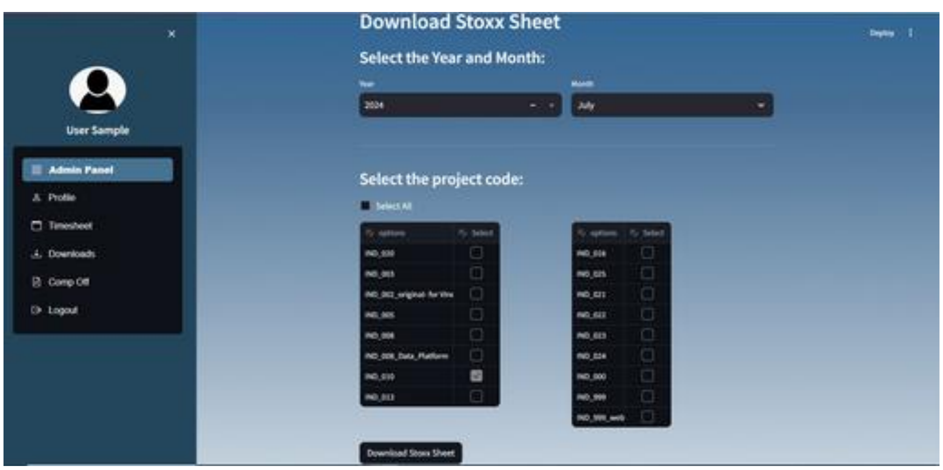
At the end there is an option for downloading the Employee data stored in the database as a CSV file. This helps the admin in knowing the current state of the Employee data table in the database.

### c.) Edit Timesheet




This section is introduced in the Admin panel to introduce flexibility in filling the timesheet even after the window for filling is over for the employees. There may happen a case where Users have not anticipated there leaves or have filled wrong work descriptions. In this case they contact their respective Admins who can individually modify anyone's timesheet without unfreezing for all the users. This features takes the Indxx ID of the user for which timesheet has to be modified, the month and the year and then generates the currently saved timesheet for that particular month and year. Now the Admin and make the required changes and then press save button so that the new updated timesheet gets stored in the database that is to be used for stoxx sheet generation.

### d.) Stoxx sheet



The **Download Stoxx Sheet** feature in TIMESAVVY offers several capabilities designed to streamline data retrieval and enhance user experience. The key features and specialties of this tool involves:

1. **Year and Month Selection:**
   - Allows users to filter and download data for specific periods. This helps in obtaining precise data relevant to a particular timeframe, facilitating accurate analysis and reporting.
2. **Project Code Filtering:**
   - Provides a comprehensive list of project codes, enabling users to select either all projects or specific ones. This targeted approach ensures that users can focus on the data that matters most to them.
3. **Bulk Selection:**
   - The "Select All" option simplifies the process of downloading data for multiple projects, saving time and effort when a broad data set is required.
4. **User-Friendly Interface:**
   - The interface is designed for ease of use, with clear labels and straightforward navigation, making it accessible even for users with minimal technical expertise.
5. **Quick Download:**
   - Once the selection is made, the "Download Stoxx Sheet" button quickly compiles and downloads the data, minimizing waiting time and enhancing productivity.

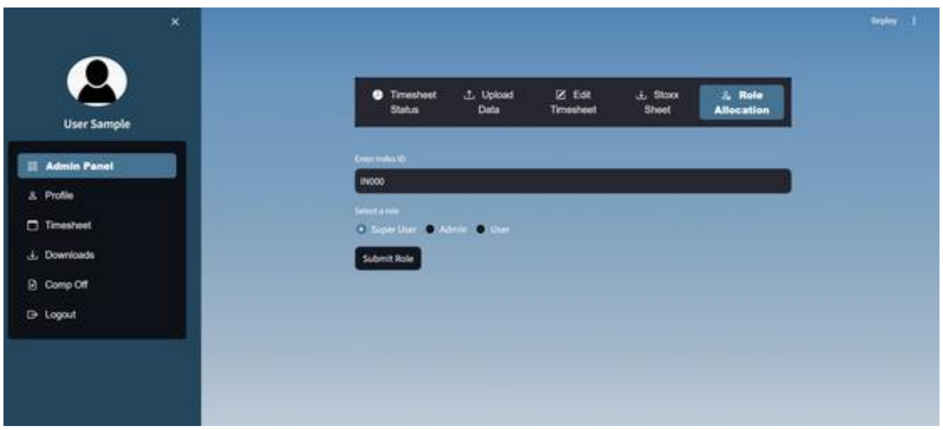
To generate and Download the Stoxx Sheet, follow the steps below:

1. **Navigate to the Download Section:**
   - From the left sidebar, click on the "Downloads" option. This will open the "Download Stoxx Sheet" page.
2. **Select the Year and Month:**
   - **Year:** Use the dropdown menu under "Select the Year and Month" to choose the desired year.
   - **Month:** Use the dropdown menu next to the Year dropdown to select the specific month for which you want to download the Stoxx Sheet.
3. **Select the Project Code(s):**
   - Under the "Select the project code" section, you will see a list of project codes.
   - **Select All:** If you want to download the Stoxx Sheet for all projects, check the "Select All" box at the top.
   - **Individual Selection:** If you prefer to download the Stoxx Sheet for specific projects, check the boxes next to the respective project codes. There are two columns of project codes for easier navigation.
4. **Download the Stoxx Sheet:**
   - Once you have selected the desired year, month, and project codes, click the "Download Stoxx Sheet" button at the bottom of the page.
   - A spinner will appear showing the generating process and then a link will appear as Download Stoxx sheet. Click on the link to download the Stoxx Sheet for the selected criteria to your device.

**Additional Notes:**

- Stoxx sheet generation usually takes around 3-4 minutes depending on the no. of employees in the project codes selected. The left sidebar contains other options such as **Profile, Timesheet, Comp Off, and Logout,** which are **unaccessible at the time of generating and downloading the Stoxx sheet.**
- Ensure that you are selecting the correct year, month, and project codes to avoid downloading incorrect data.
- If every thing works out successfully you will get a message showing names of the employees in that project code who have not even generated once their timesheets and if all of them have generated it then a Generated Successfully message will appear.
- If there is an error in the generation than a Failed to generate Stoxx sheet message is displayed.

**e.) Role Allocation**




This Feature is specially reserved for Super Users or the Key Administrators of the Time Savvy App. This feature is used to give roles to the users so that they can access their respective features. **By default all users are set to role User**. To create a first Super User, Admin has to create that role through the backend server. After that he/she can assign any employee their roles by just entering their Indxx ID's and selecting their roles from the options given. There are three roles to choose from:

1. **User:** This represents a normal user roles which give access to all the features of the sidebar except the Admin Panel. A normal user can see his/her profile, fill and download timesheets avail, comp offs or logout.
2. **Admin:** This role gives user access to all the features a normal user would have and the partial access to Admin Panel. In this role a user have access to timesheet status and editing features as well as uploading data and generating Stoxx sheets. However he will not have the access to role allocation feature, which is reserved for Super User.
3. **Super User:** In this role a user will have all the access of the features of both User and Admin roles as well as Role Allocation feature as well through which he/she assign any registered user with their role.

### (vi) Logout

This section in the sidebar allows to logout of the application once you are done with your work. Make sure to save all the files fetched or uploaded into your computer or the servers database before logging out of the application. Logout resets the application and all your work stored in the cache is removed, So you should definitely save the timesheets before you logout from the app.

# III) FAQs and Troubleshooting

**Q1: Why can't I see the Admin Panel option?**

A1: The Admin Panel option is only visible to users who have been assigned administrative or superuser privileges. If you believe you should have access, please contact your system administrator.

**Q2: How do I contact support?**

A2: For any technical issues or support requests, please contact our support team. Provide a detailed description of the issue, and our team will assist you promptly.

**Q3: What should I do if I encounter an error message while uploading data?**

A3: Ensure that your CSV file adheres to the specified format and contains all required fields. Refer to the sample files provided in the Upload Data section for guidance. If the issue persists, contact support for further assistance.

**Q4: Can I edit my timesheet after the window is frozen?**

A4: No, normal users cannot edit their timesheet after the window is frozen. However, administrators can make necessary changes using the "Edit Timesheet" feature in the Admin Panel.

**Q5: How do I apply for a comp off?**

A5: Navigate to the Comp Off section in the sidebar, enter the duration of your comp off (from date and to date), select the status (Availed/Not Availed), and click the submit button. A success message will confirm that your comp off request has been saved.

For any other questions or issues, please refer to the user manual or contact support.

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# 5. Conclusion

Thank you for choosing TIME SAVVY. We are confident that this application will enhance your time management and project tracking processes, contributing to a more organized and efficient work environment.

For any additional support, please do not hesitate to reach out to our support team. We are here to help you make the most of your TIME SAVVY experience. If you need any further information or assistance, please refer to the relevant sections or contact the support team. Thank you for using TIME SAVVY.