Timesheet App

User Guide

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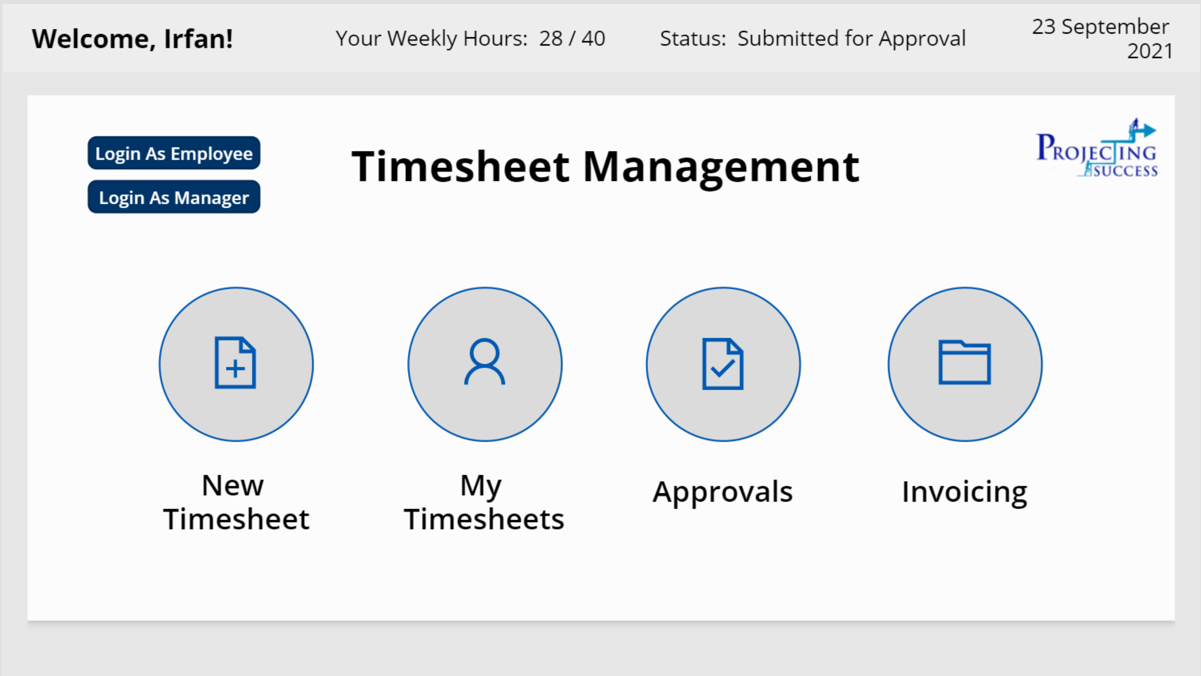
1. Introduction



The Timesheet app is a tool for employees to log the hours they have spent working on a specified project. These time entries can then be tracked to view any changes to their status'.

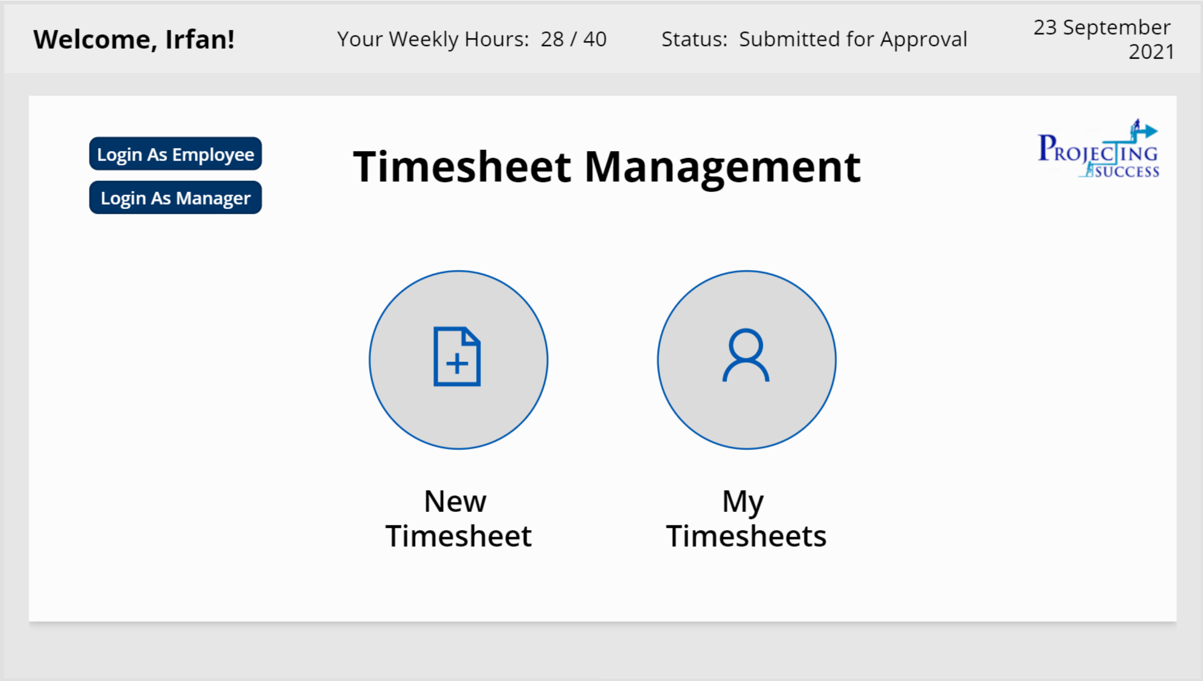
Managers can then view the time entries that have been submitted by their employees, and can approve or reject the entries.

An additional feature allows managers to generate invoices for clients, based off the hours that have been submitted through the app.

Please note that before use of the app, all employees must have a manager assigned onto their Office 365 account.

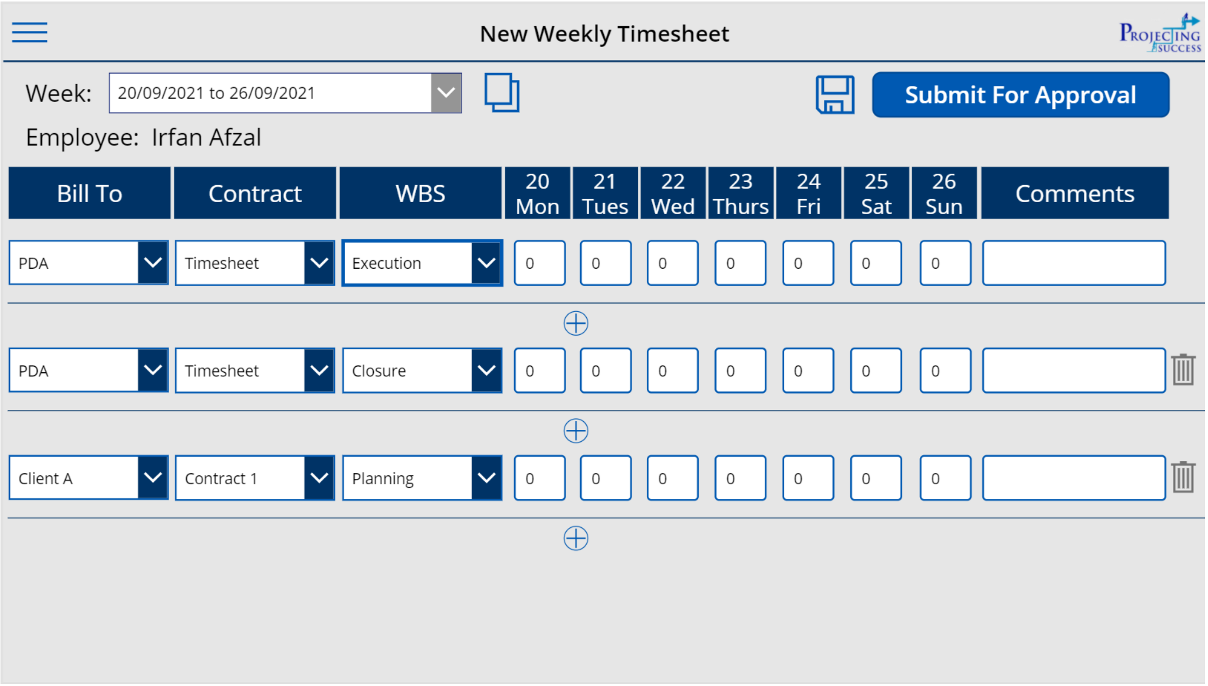
2. Using as an Employee

2.1 Employee Login



Once logged in as an employee the homepage will show the following two options: “New Timesheet” and “My Timesheets”

2.2 “New Timesheet”



Selecting the “New Timesheet” button will navigate you to this screen, whereby you can use the dropdowns to select which week you want to create a time entry for, and which project you would like to enter hours for.

The “Bill To”, ”Contract” and “WBS” dropdowns will be populated by the projects you have been assigned to. On the right of these dropdowns you can enter the hours you will spend working on each project per day. Please note these fields will only accept number values between 0-24.

There is a textbox on the right of each row for entering a comment for that particular time entry, this is optional however.

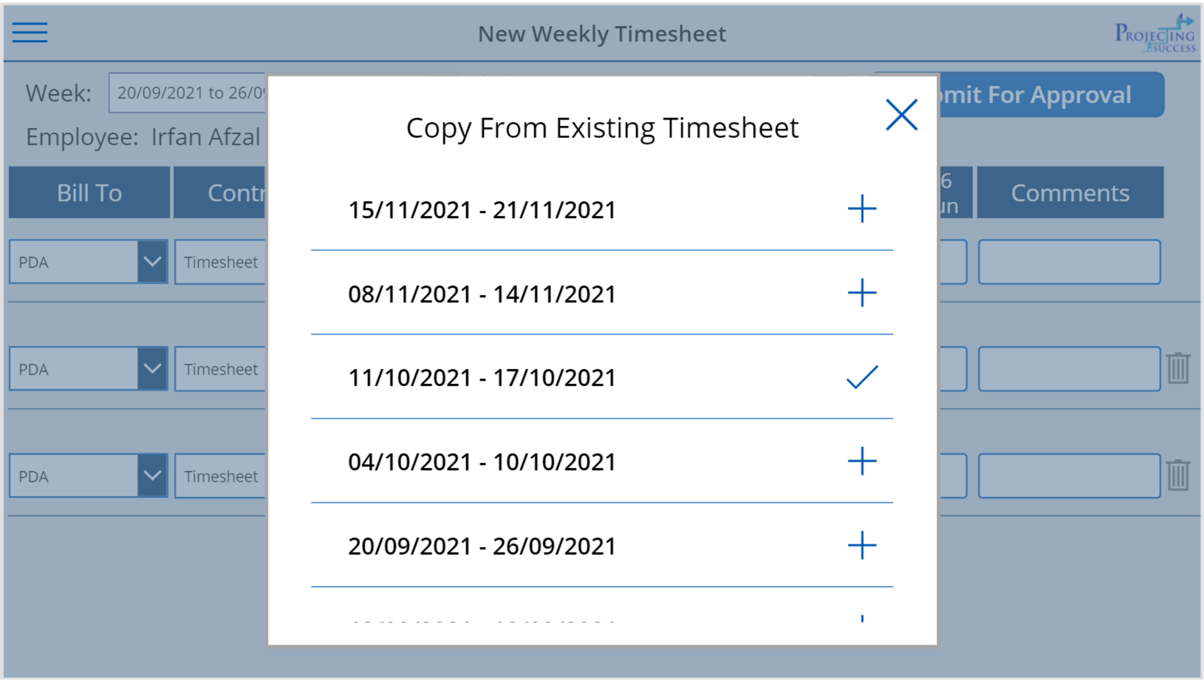
To create a new row, for example to add hours to a different project, you can select the (+) icon underneath each row. If you would like to delete any extra rows, simply select the Bin icon on the right of each additional row.

The Save icon allows you to save the timesheet you have been editing for another time, this will not submit any hours to your manager. To submit an entry that has been saved for later you must select it from the “My Timesheets” screen. This point will be expanded upon in section 2.5.

To submit a timesheet to your manager, simply press the “Submit For Approval” button. Once submitted, this entry will be available for your manager to view and respond to.

2.3 “Copy From an Existing Timesheet”

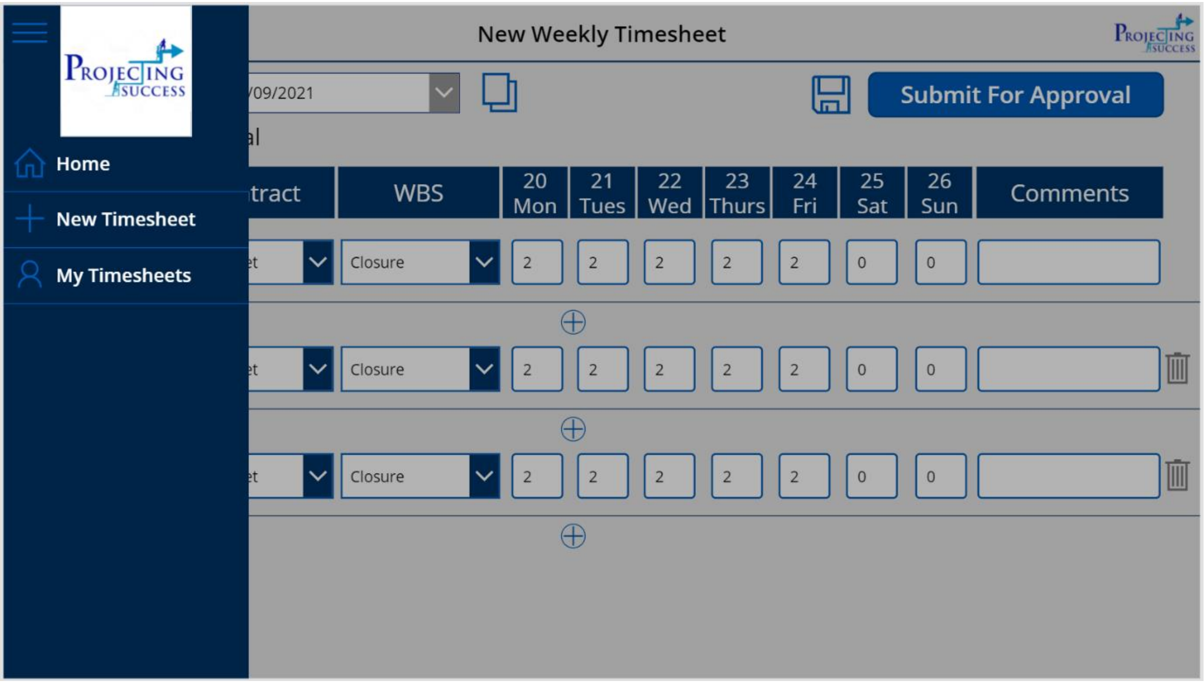
If you will be repeating the same hours from a previous week, the option to copy a pre-existing timesheet is available. To select hours from a previous week, select the Copy icon next to the week selector dropdown. This will prompt the following screen:



To choose the required week, scroll through the list and select the row, this will automatically update the timesheet currently being edited. Please note, this will overwrite any hours you have been editing already.

Once selected you can close the pop-up by selecting anywhere outside the box or the (X) icon.

2.4 Navigation Menu



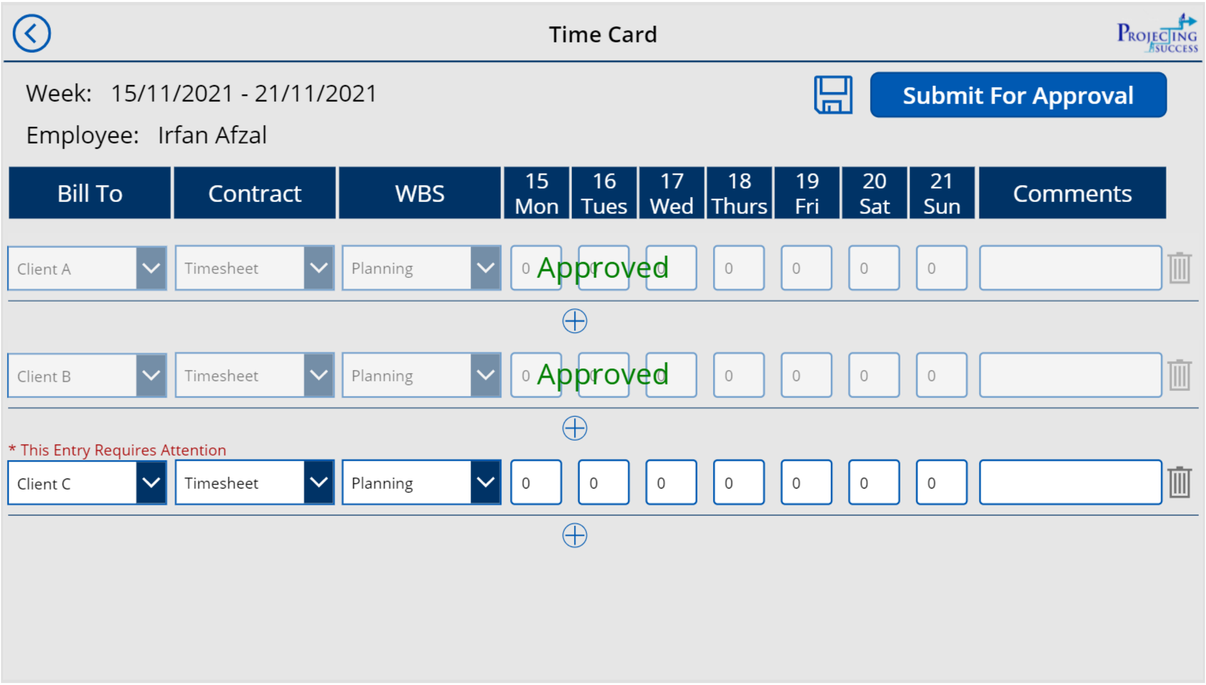
The Hamburger icon on the top left of the page will prompt the navigation menu to show/hide. To navigate to the required page simply select the icon in the appropriate row.

2.5 "My Timesheets"

This page will display all of the timesheets you have made. Each row shows the status of the particular week's entry:

- Pending: The entry has been saved for editing
- Submitted for approval: The entry has been sent to your manager, awaiting a response
- Accepted: The entry has been accepted
- Rejected: The entry has been rejected
- Requires attention: The entry contains a rejected row which will need editing.

To edit or view more details on the entry select the appropriate row. This will navigate you to the following page:



Entries that have been approved will no longer be editable, whilst entries that have be rejected (or are still pending) will be editable.

2.6 “View All Timesheets”

All of Your Timesheets

Filter By: 2021 PDA

Title	Mon	Tues	Weds	Thurs	Fri	Sat	Sun	Total	Comments	Status	Client	Contract
04/10/2021 - 10/10/2021	8	8	8	8	8	0	0	40		Approved	PDA	Timesheet
11/10/2021 - 17/10/2021	2	2	2	2	2	0	0	10		Approved	PDA	Timesheet
11/10/2021 - 17/10/2021	2	2	2	2	2	0	0	10		Approved	PDA	Timesheet
11/10/2021 - 17/10/2021	2	2	2	2	2	0	0	10		Approved	PDA	Timesheet
20/09/2021 - 26/09/2021	2	2	2	2	2	0	0	10		Submitted for A...	PDA	Timesheet
20/09/2021 - 26/09/2021	2	2	2	2	2	0	0	10		Submitted for A...	PDA	Timesheet
20/09/2021 - 26/09/2021	2	2	2	2	2	0	0	10		Submitted for A...	PDA	Timesheet
18/10/2021 - 24/10/2021	2	2	2	2	2	0	0	10		Rejected	PDA	Timesheet
18/10/2021 - 24/10/2021	2	2	2	2	2	0	0	10		Rejected	PDA	Timesheet
18/10/2021 - 24/10/2021	2	2	2	2	2	0	0	10		Rejected	PDA	Timesheet
20/09/2021 - 26/09/2021	5	5	5	5	5		0	25		Submitted for A...	PDA	Timesheet

To view a summary of all the timesheets you have created, select the “View All Timesheets” button on the heading of the “My Timesheets” page.

This page will show a table including all of the time entries that you have created and all of the related details. This can be filtered by the year and client.

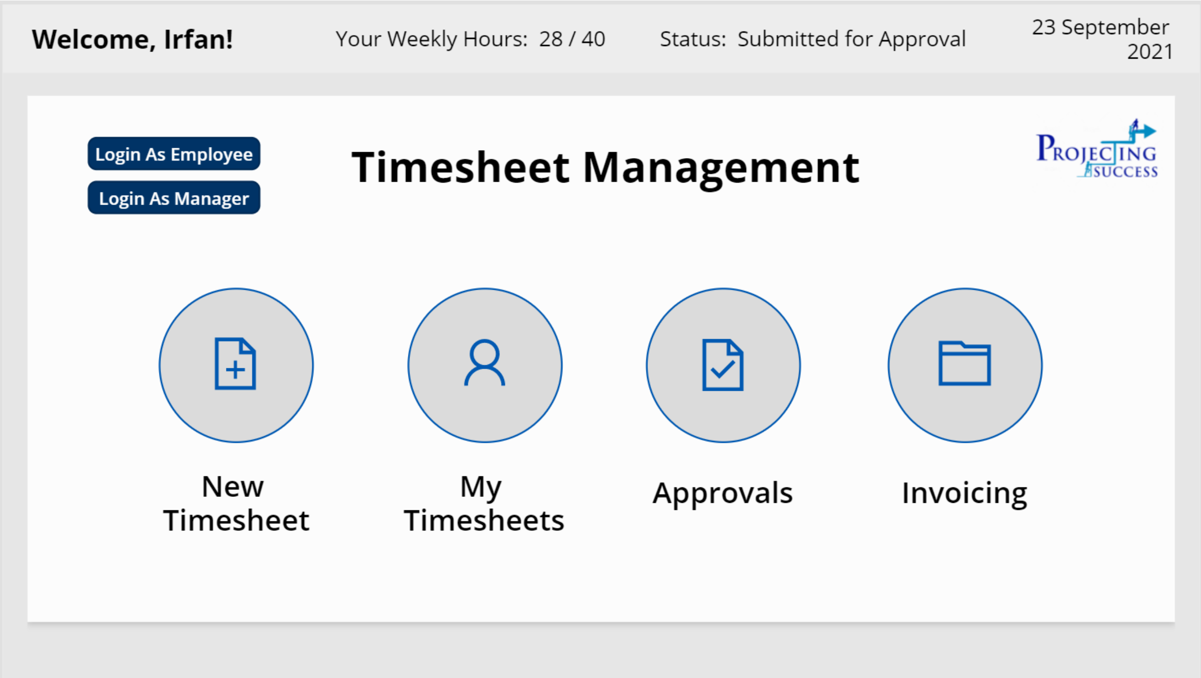
To return to the previous page, select the (<) icon on the top left of the page.

2.7 Finishing up

Once you have submitted your request, please ensure you wait until the confirmation message appears or the request appears on the “My Timesheets” page. If so you can safely exit the app or log out to return to the home screen.

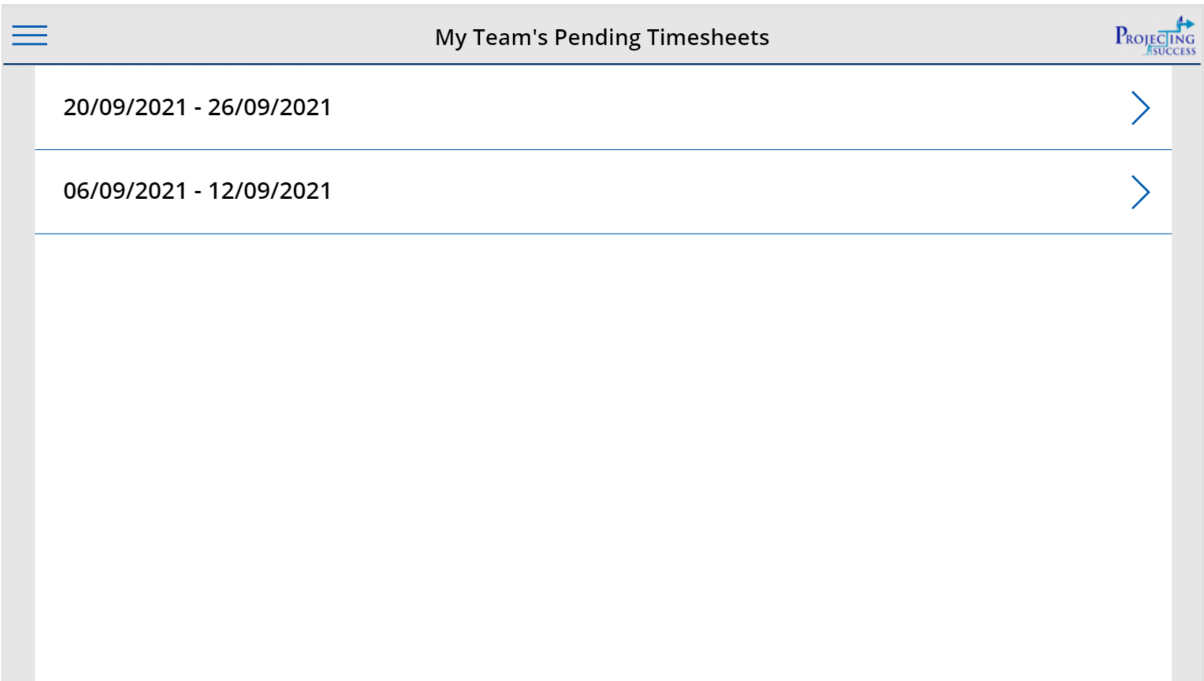
3. Using as a Manager

3.1 Manager Login

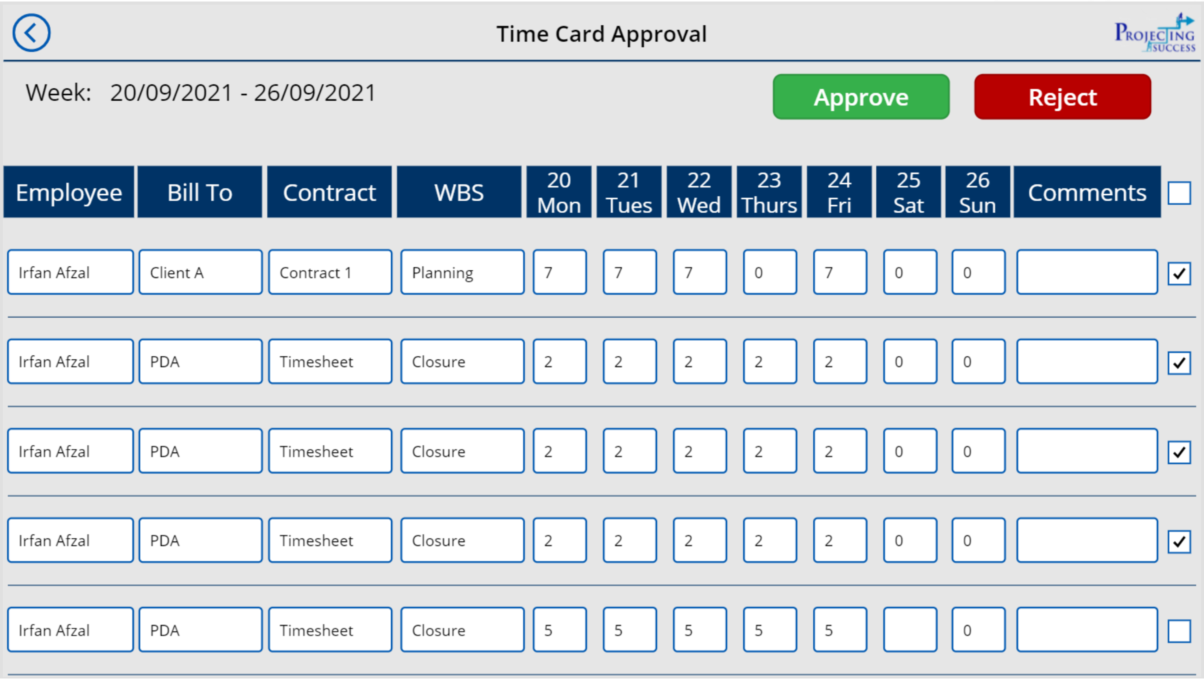


On top of the first two features, the manager login allows users to access the “Approvals” and “Invoicing” pages.

3.2 “Approvals”



This page displays the weeks for which employees have submitted timesheets for. To view the timesheets, select the row for whatever week you would like to view.



Time Card Approval

Week: 20/09/2021 - 26/09/2021

Approve Reject

Employee	Bill To	Contract	WBS	20 Mon	21 Tues	22 Wed	23 Thurs	24 Fri	25 Sat	26 Sun	Comments	☐
Irfan Afzal	Client A	Contract 1	Planning	7	7	7	0	7	0	0		☑
Irfan Afzal	PDA	Timesheet	Closure	2	2	2	2	2	0	0		☑
Irfan Afzal	PDA	Timesheet	Closure	2	2	2	2	2	0	0		☑
Irfan Afzal	PDA	Timesheet	Closure	2	2	2	2	2	0	0		☑
Irfan Afzal	PDA	Timesheet	Closure	5	5	5	5	5		0		☐

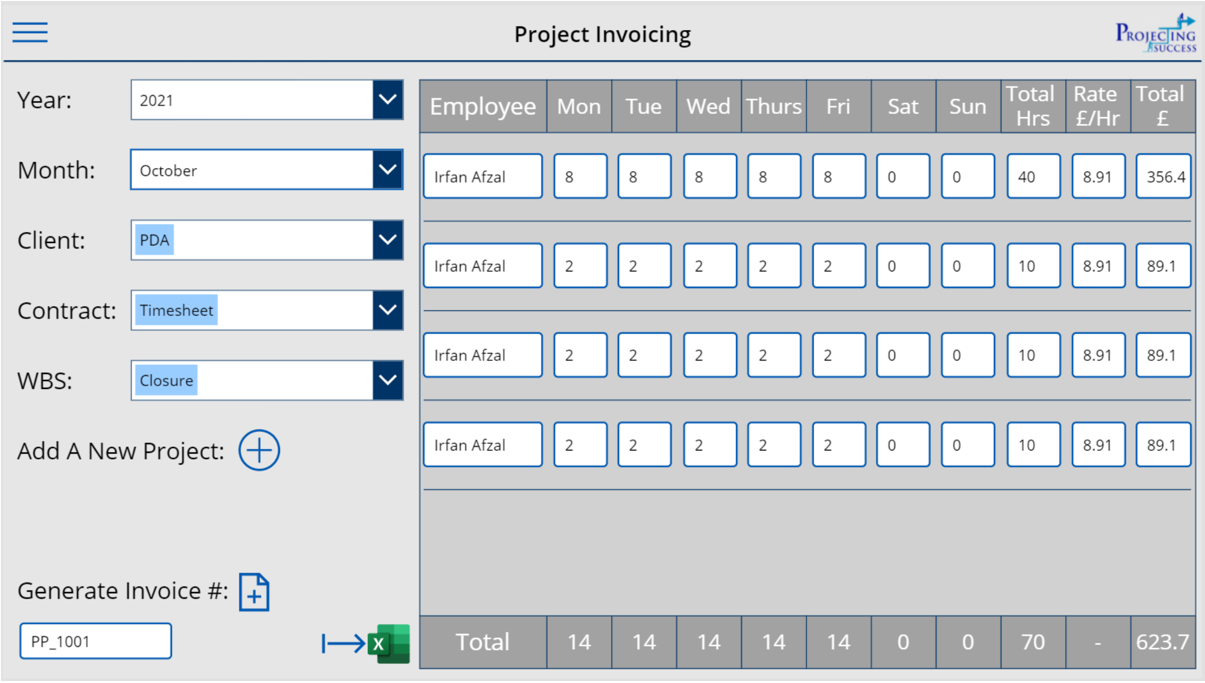
Once a week has been selected, you will be directed to the above page. Here you can view all of the time entries your employees have made for that particular week.

Each entry can be selected using the checkbox on the right-hand side. To select all, check the box at the very top, next to the “Comments” heading.

When the desired entries have been selected you can either approve or reject them using the buttons visible on the top right of the page.

To return to the previous page, select the (<) icon on the top left of the page.

3.3 "Invoicing"



This page displays the hours that employees have spent working on a given project. To ensure accuracy, only time entries that have been accepted by managers will show up.

To choose the month and year you would like the invoice to display, please select the required information from the first two dropdowns.

To choose the particular Client/Contract you would like to see, please select from the corresponding dropdowns.

3.4 Generating an Invoice

To generate an invoice, you must first select the required Client/Contract and date range. You can then generate and invoice number using the [+] icon towards the bottom right of the page.

This will allow you to select the Export icon, |-->, next to the Excel logo. Once pressed, a loading icon will appear, after a few seconds the invoice file will have been created in the designated folder. The invoice using the example data here will look like:

INVOICE

Projecting Success Ltd
contact@projectingsuccess.co.uk
+44 (0)777 5704044
Woodspring, Livery Rd, West Winterslow,
Salisbury, SP5 1RH, United Kingdom

INVOICE #: PP_1001
DATE FROM: 01/10/2021
DATE TO: 31/10/2021
DATE ISSUED: 24/09/2021

ADDRESSED TO:
PDA
12 Street
City PDA, PD1 1DA

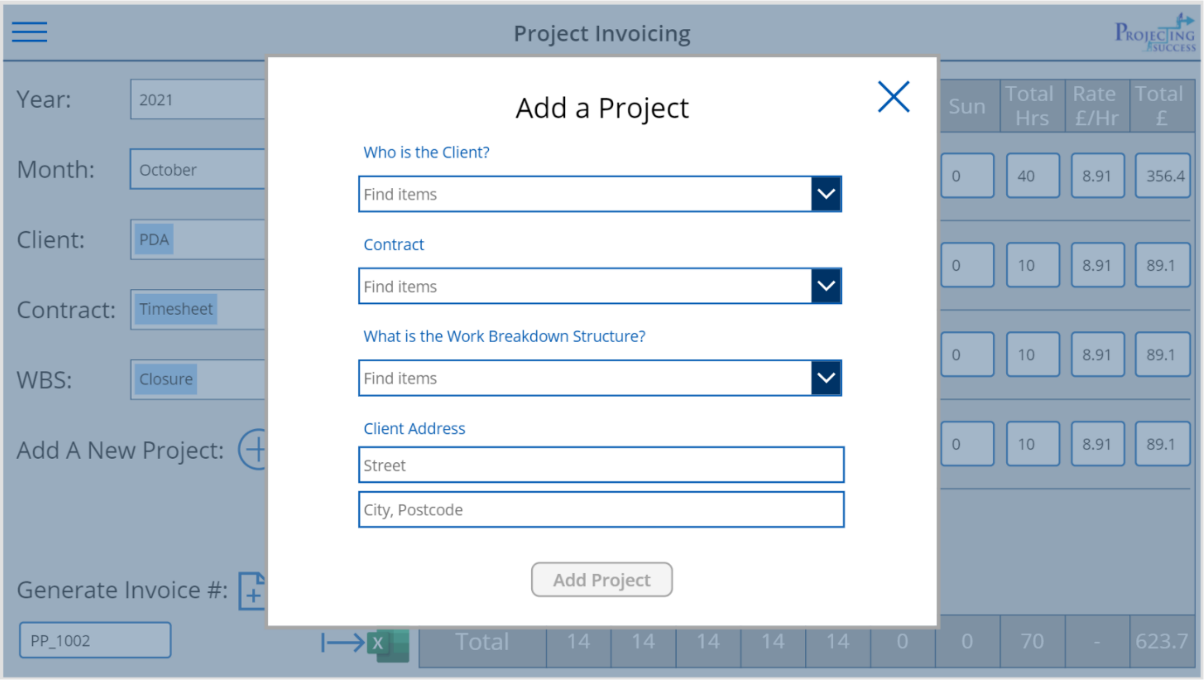
CONTRACT DETAILS:
Timesheet
Closure

EMPLOYEE	HOURS	RATE (£)	AMOUNT (£)
Irfan Afzal	40	8.91	356.4
Irfan Afzal	10	8.91	89.1
Irfan Afzal	10	8.91	89.1
Irfan Afzal	10	8.91	89.1
		TOTAL:	£ 623.7

Please pay within 14 Days of the issue date,
Thank you for your business!

3.5 Adding a New Project

To add a new project to the database, please select the (+) icon, this will prompt the following screen to pop-up:



To add a new Client, type in the required details and press the “Add Project” button.

If you would like to add a new Contract for an existing Client, you can choose a pre-existing Client from the first dropdown menu, and then type in the new Contract in the second dropdown. The same process applies to adding a new WBS for a pre-existing Contract, using the corresponding dropdown menus.

All clients require an address to be entered so that this information can be passed into the invoice document.