TIMESHEET MANAGEMENT SYSTEM

OFFICIAL DOCUMENTATION

BY

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1. Introduction

What is the Timesheet Management System (TMS)?

The Timesheet Management System (TMS) is a platform designed to simplify tracking, managing, and approving employee work hours and tasks. It centralizes timesheet management, ensures compliance, and improves efficiency by digitizing time tracking processes. TMS enhances transparency and accountability within UCI.

Why Do We Need a Timesheet Management System?

Effective time management is essential for productivity. Traditional tracking methods, like paper records, are prone to errors and inefficiencies. TMS addresses these issues by:

- **Boosting Productivity**: Automates time tracking and approvals, reducing manual effort.
- **Improving Accuracy**: Standardizes data entry to minimize errors.
- **Fostering Accountability**: Encourages employees to take ownership of their work.
- **Supporting Decisions**: Provides real-time insights for better resource management.

Problems Solved by TMS

TMS tackles common organizational challenges:

1. **Inefficient Time Tracking**:
    - **Issue**: Manual methods cause delays and inconsistencies.
    - **Solution**: TMS enables accurate and timely submissions via an easy interface.
2. **Complex Approval Workflows**:
    - **Issue**: Lengthy processes create bottlenecks.
    - **Solution**: Automates role-based workflows for faster approvals.
3. **Limited Engagement Insights**:
    - **Issue**: Difficulty tracking employee tasks.
    - **Solution**: Provides detailed reports for better team management.
4. **Compliance Challenges**:
    - **Issue**: Maintaining audit trails and policy adherence.
    - **Solution**: Tracks logs and supports version history for engagements.
5. **Communication Gaps**:
    - **Issue**: Missed updates and delayed approvals.
    - **Solution**: Sends real-time notifications for pending tasks.

Key Features of TMS

- **Role-Based Access**: Custom functions for employees, managers, and HR.
- **Engagement Management**: Task creation, assignment, and tracking.
- **Version History**: Tracks changes to timesheets and engagements.
- **Notification System**: Real-time updates for critical actions.
- **Microsoft Account Integration**: Simplified login using company accounts.

2. Types of Roles

The TMS is designed to accommodate various roles, ensuring streamlined functionality and role-specific access to features. This chapter outlines the three primary roles and the two additional sub-roles within the system, along with their respective responsibilities and accessible pages.

Primary Roles

1. Employee

Employees use the TMS to manage their timesheets and track their engagement details. Their accessible pages include:

- **Employee Dashboard**: Displays employee's approver details, last submitted timesheet, pending timesheets.
- **Add New Timesheet**: Enables employees to log their daily tasks, working hours, and comments on weekly basis.
- **View Previous Timesheets**: Provides a history of all submitted timesheets for reference.
- **My Engagements**: Lists assigned engagements, along with team members and details.

2. Manager

Managers oversee team performance and handle timesheet approvals. Their accessible pages include:

- **Manager Dashboard**: Displays Count of pending approvals, Managed users, and missing Timesheets.
- **Pending Approvals**: Lists timesheets awaiting the manager's review and approval.
- **Approved Timesheets**: Displays a record of timesheets approved by the manager.
- **Manage My Engagements**: Allows the creation, assignment, and modification of tasks and team roles within engagements.
- **Reports**: Provides detailed insights into team performance, timesheet summaries, and engagement statistics.

3. HR

HR administrators monitor the overall status of timesheet approvals and engagements. Their accessible pages include:

- **HR Dashboard**: Provides a bird's-eye view of missing primary approver, missing secondary approver and count of defaulters.
- **Approval Status**: Tracks the progress of timesheet approvals across teams.

- **Assign Approver**: Enables HR to designate or modify approvers for specific timesheets or engagements.
- **Engagement Status**: Monitors active and completed engagements, along with associated team members and tasks.

Sub-Roles

1. Secondary Approver

A backup approver for timesheets or tasks in cases where the primary manager is unavailable. Secondary approvers receive notifications for pending approvals and have access to relevant approval workflows.

2. Co-Owner

Shared responsibility for managing engagements with the primary owner. Co-owners can add or update tasks, assign team members, and monitor engagement progress.

3. Admin

Responsible for overarching system configurations and role management. Admins ensure that all roles and permissions are correctly assigned and can access audit logs for compliance purposes.

3. Employee's Portal

This chapter provides an overview of the Employee module in the Timesheet Management System (TMS). Employees can interact with the following four key pages: Dashboard, Add New Timesheet, Previous Timesheets, and My Engagements. Screenshots and detailed descriptions are provided for each page.

Employee Dashboard

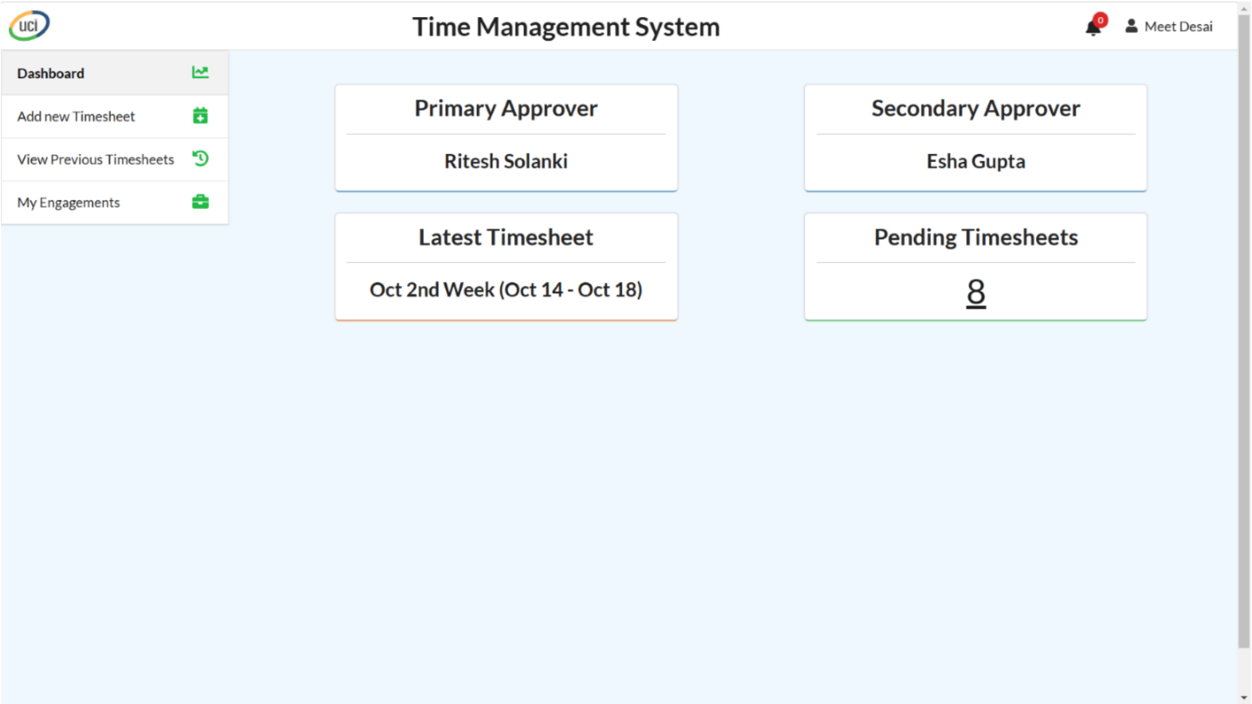


Fig 3.1 - Employee Dashboard

The Employee Dashboard is the central hub for employees to monitor their timesheet-related activities. It includes the following sections:

- **Primary Approver**: Displays the name of the manager or individual responsible for reviewing the submitted timesheets.
- **Secondary Approver**: Shows the backup approver who reviews timesheets if the primary approver is unavailable.
- **Latest Timesheet**: Highlights the most recently submitted timesheet.
- **Pending Timesheets**: Indicates the number of timesheets yet to be submitted.

Clicking on the "Pending Timesheets" block provides additional details.

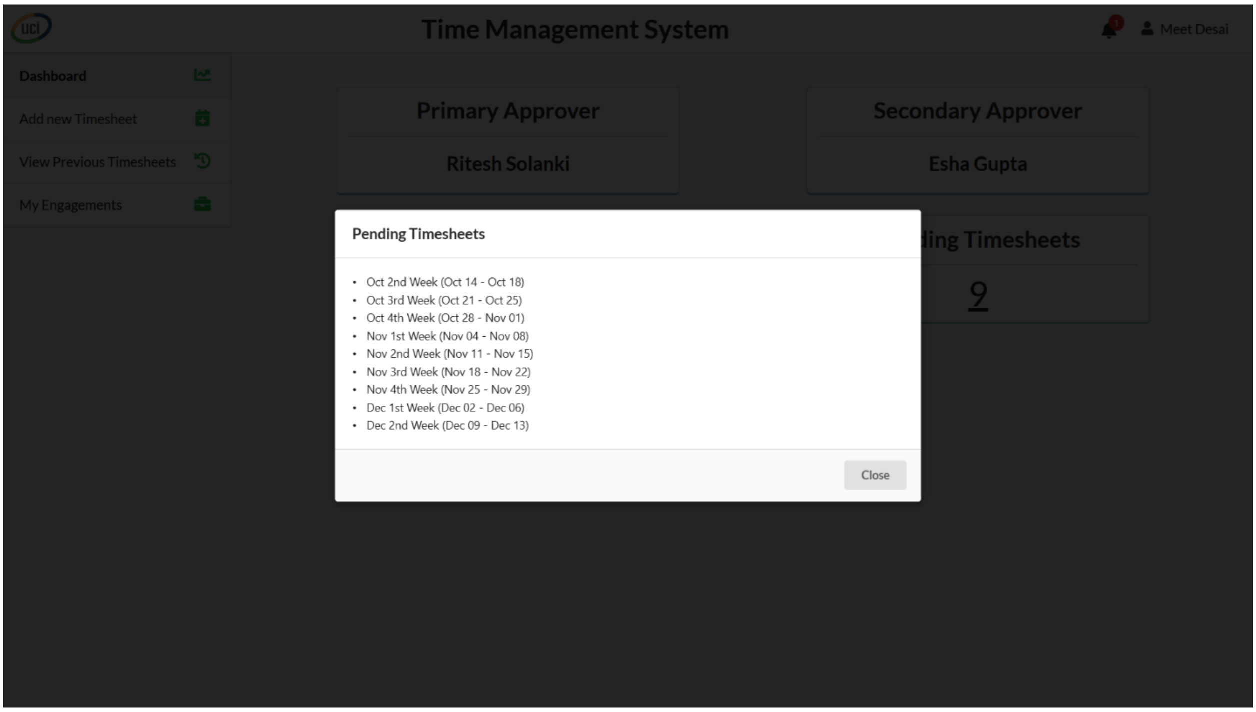


Fig 3.2 - Pending Timesheets

This section lists all pending weeks along with the respective dates for which timesheets need to be submitted. It ensures employees can keep track of their incomplete submissions.

Add New Timesheet

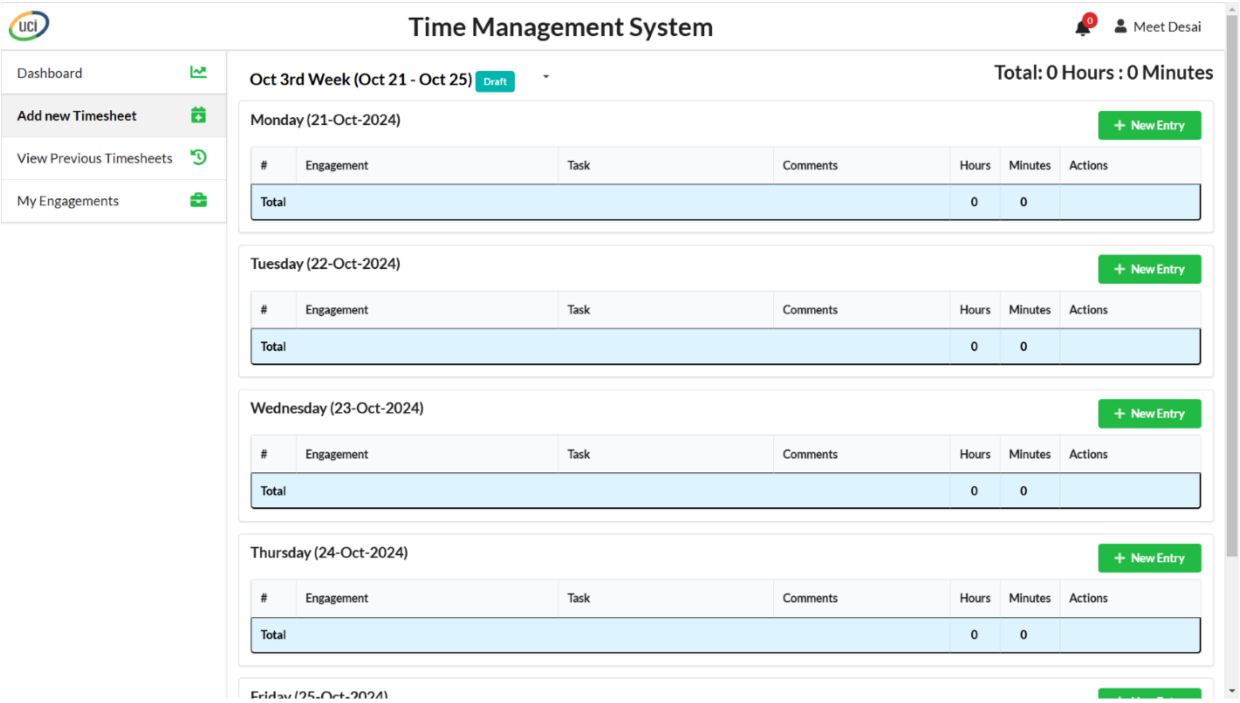


Fig 3.3 - Add New Timesheet Overview

The "Add New Timesheet" page allows employees to fill out new or rejected timesheets. Key features include:

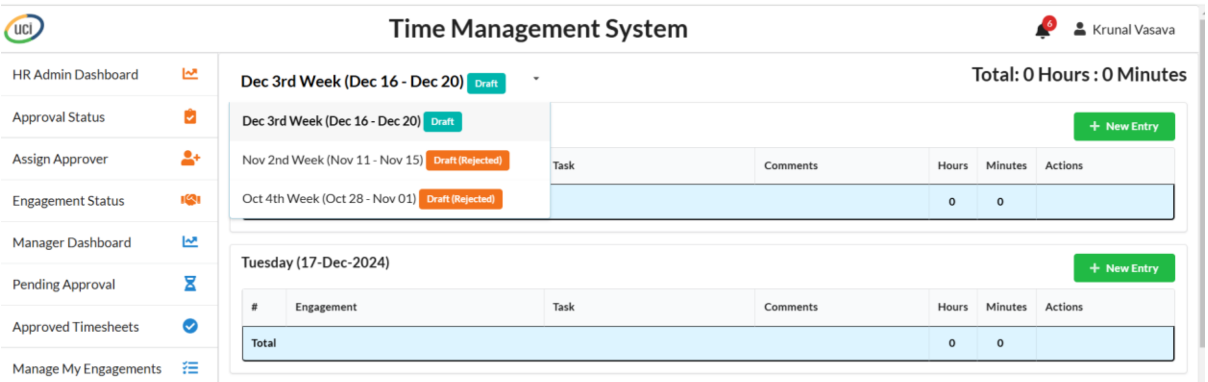


Fig 3.4 – Week Selector & Total hours/minutes

- **Week Selector**: Displays the specific week for which the timesheet is being filled.
- **Total Hours and Minutes**: Summarizes the total logged hours and minutes on the top-right corner of the page.

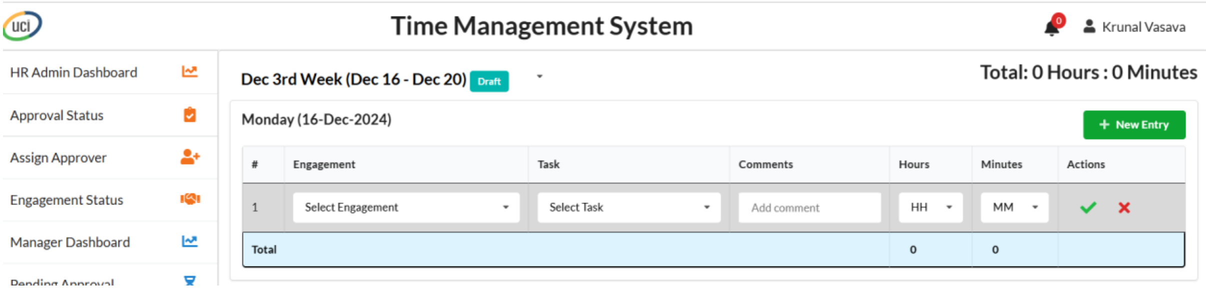


Fig 3.5 - Add New Timesheet – New Entry

Employees can add entries by clicking the **<u>"+ New Entry"</u>** button. This opens a form to:

- Select engagements from the dropdown.
- Fill in relevant metadata, including the hours worked and task details for each day.

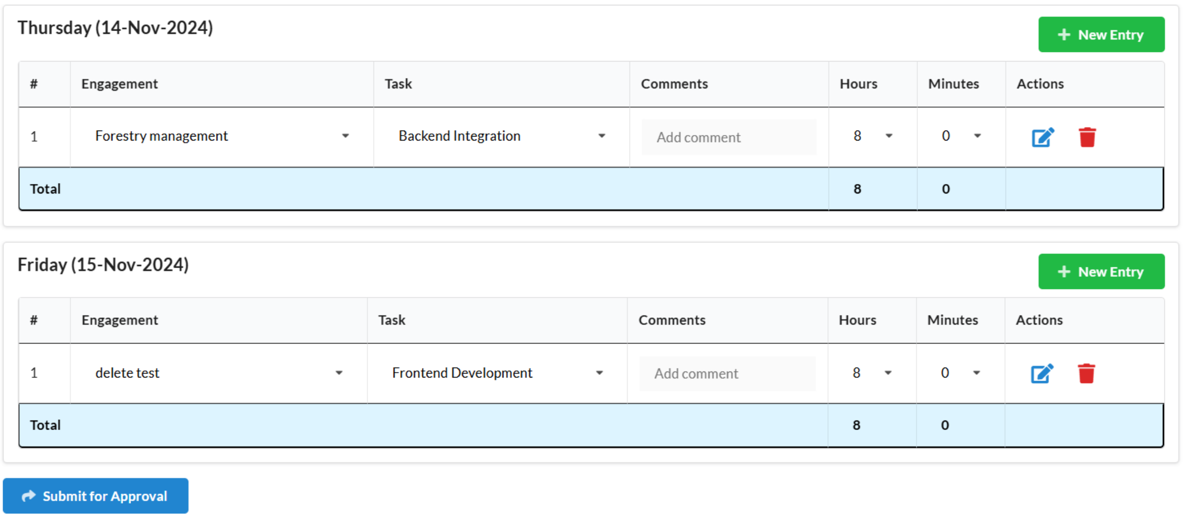


Fig 3.6 - Add New Timesheet – Submit for Approval

After filling timesheets for all days of week employee needs to submit their timesheet for approval by clicking on **"Submit for Approval"** button.

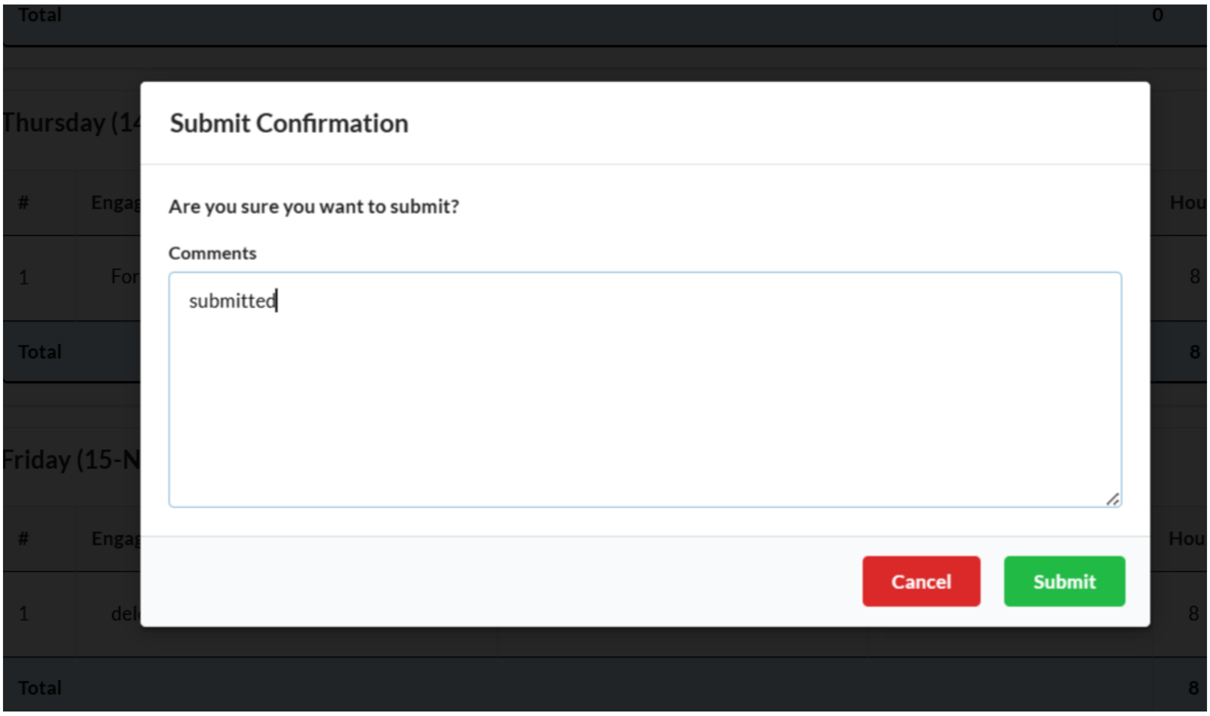


Fig 3.7 - Add New Timesheet – Submission comment

After Clicking on **“Submit for Approval”** button you can see this POPUP where you can put submission comment as optional and then you have to click on Submit button.

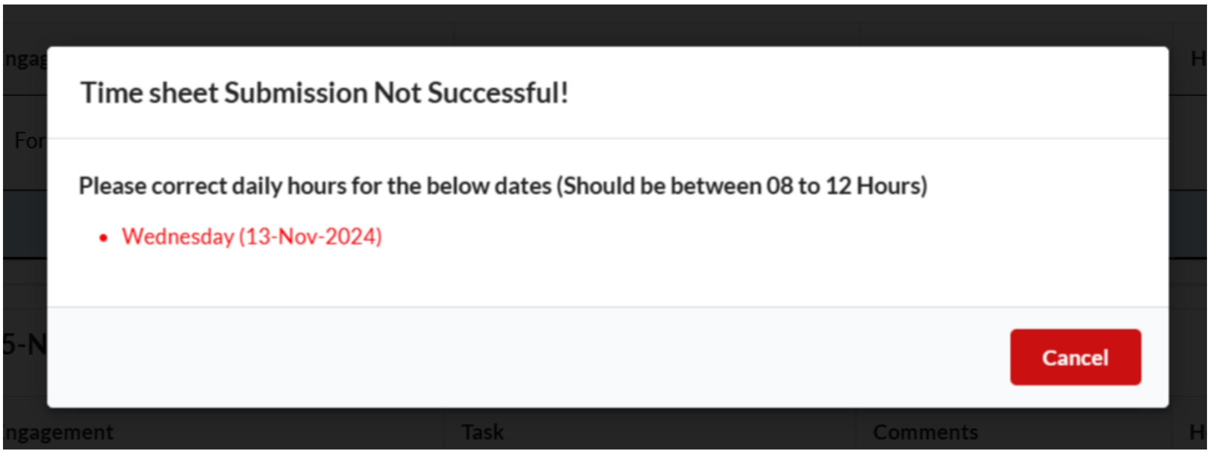


Fig 3.8 - Add New Timesheet – Validation Error

Now, here you can see the validation error if your daily timesheet hours are not in the specific range. **For now, this range is minimum 8 hrs and maximum 12 hrs.**

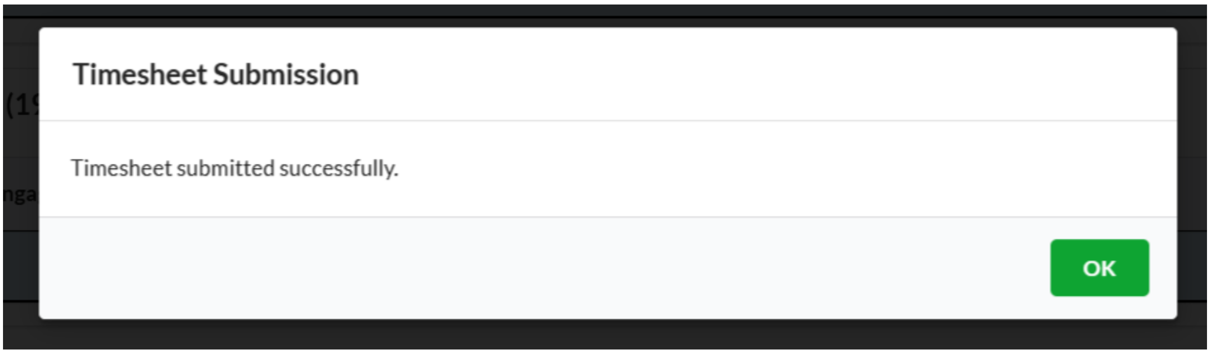


Fig 3.9 - Add New Timesheet – Success popup

Now, after submission of employee's correct timesheet after adjusting daily hours, employee will see this success POPUP.

On click of OK, Employee will see their next Pending timesheet for submission.

Validations:

- Employee's daily hours of timesheet should be in a specific range. For now, this range is 8 to 12 hrs.
- Employee can not fill timesheet of future weeks.
- Employee can not edit timesheet once submitted.
- Employee can edit timesheet in draft or rejected state only.

Previous Timesheets

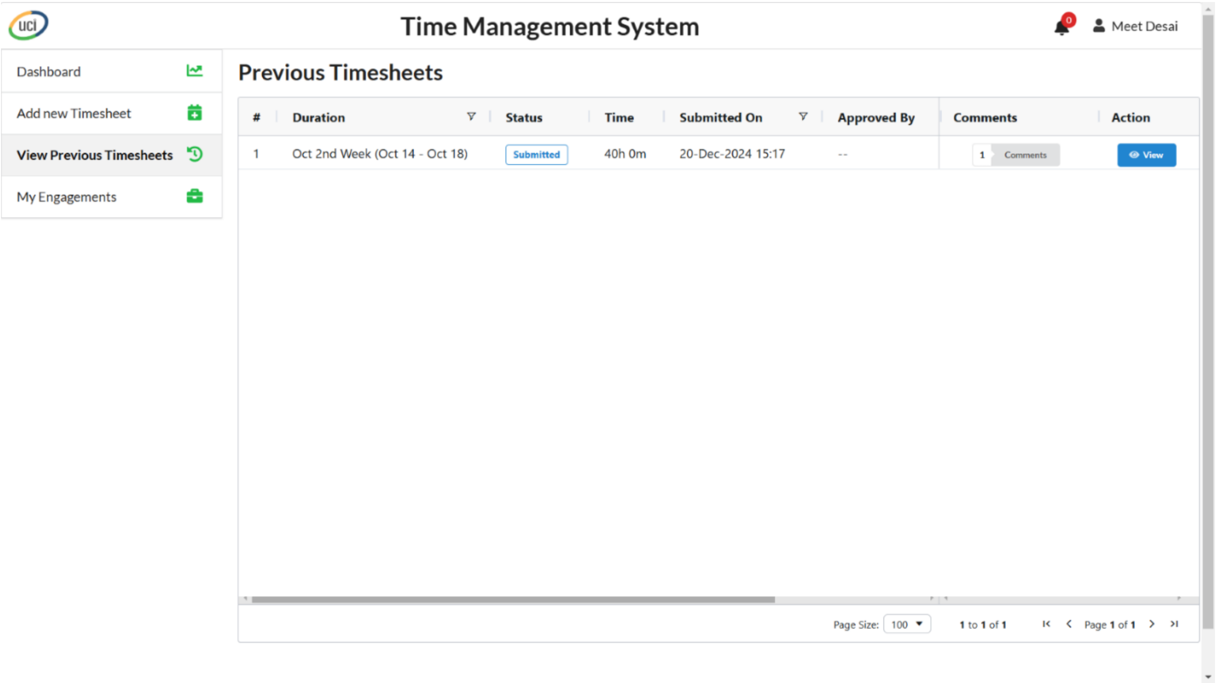


Fig 3.10 - Previous Timesheets Overview

The "Previous Timesheets" page provides access to all previously submitted timesheets. It helps employees review their historical submissions.

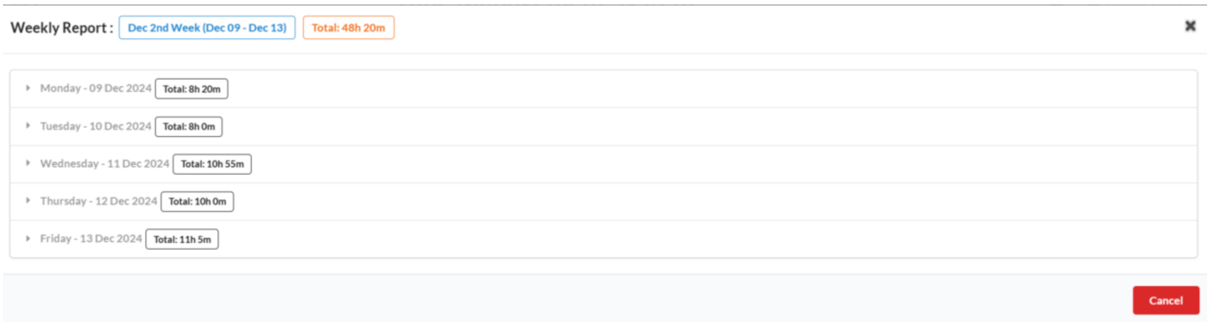


Fig 3.11 - Previous Timesheets – Week View

Clicking on the "View" button for a specific week reveals:

- **Week Details**: Breakdown of timesheets for each day within the week.

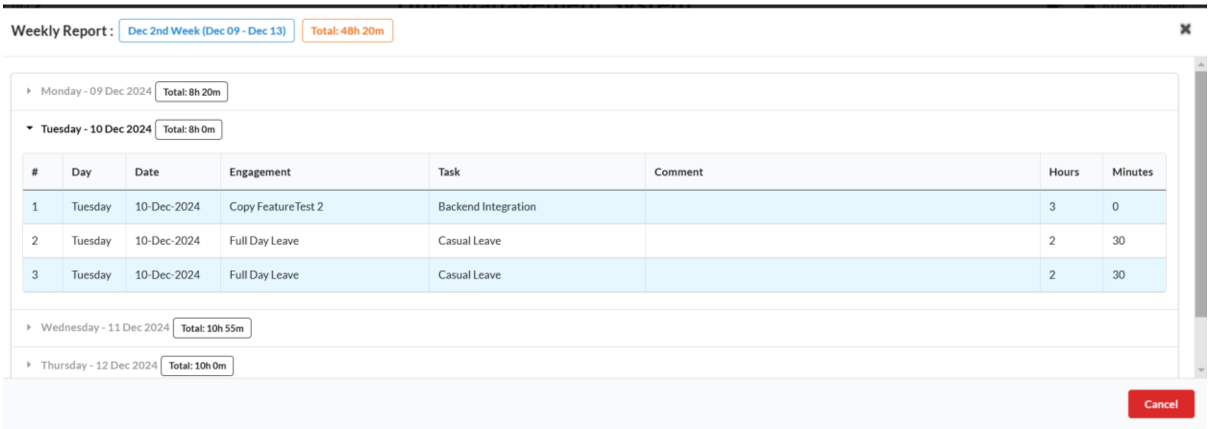


Fig 3.12 - Previous Timesheets – Day View

Expanding an individual day provides:

- **Day Details**: A detailed view of all entries logged for that day, including tasks and engagement information.

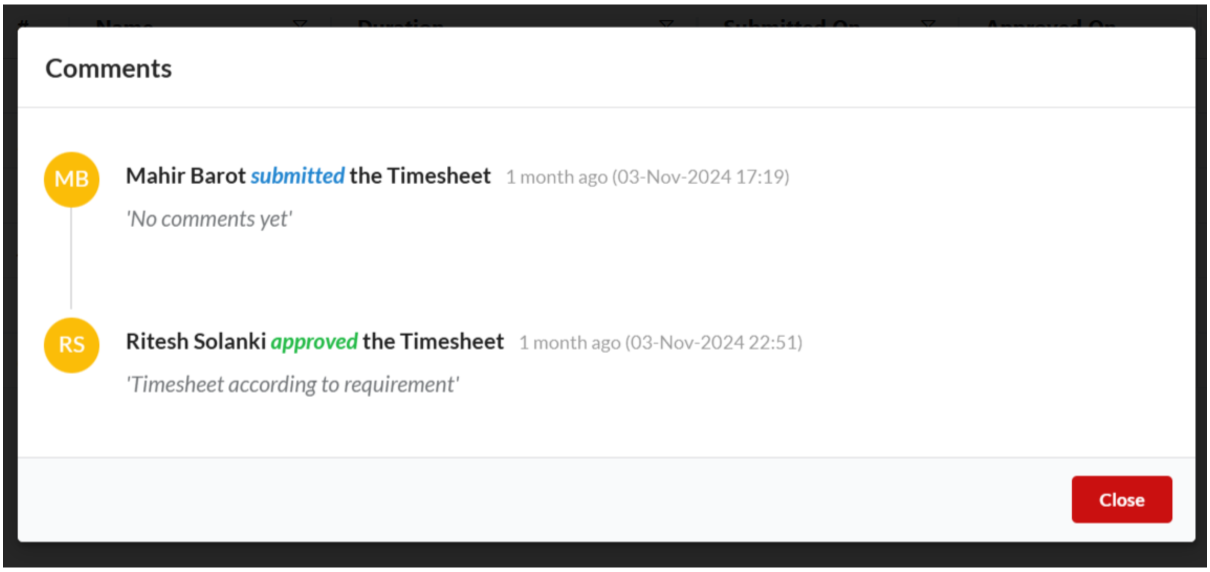


Fig 3.13 - Previous Timesheets – Comment View

Clicking on the "Comments" button for a specific week reveals:

- **Comment Details**: A detailed view of all comments added against this timesheet.

My Engagements

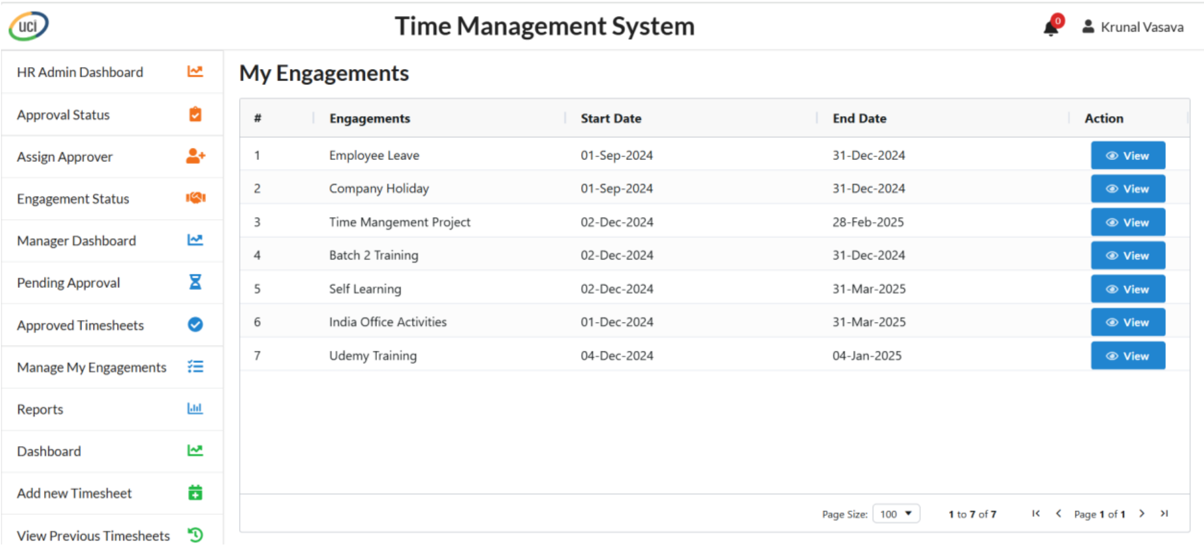


Fig 3.14 - My Engagements Overview

The "My Engagements" page offers an overview of all engagements assigned to the employee.

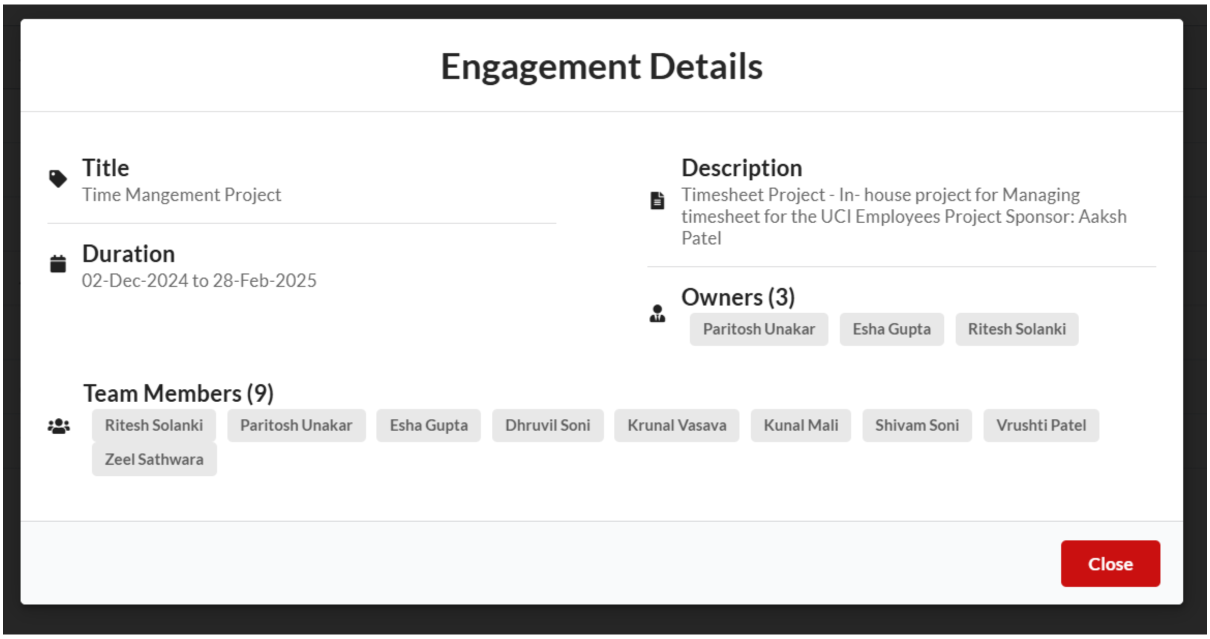


Fig 3.15 - My Engagements – Detailed View

Clicking the "View" button in the action pane reveals:

- **Engagement Details**: Comprehensive information about each engagement, such as Description, startdate , enddate, owners, team members.

4. Manager's Portal

This chapter provides an overview of the Manager module in the Timesheet Management System (TMS). Managers can interact with the following five key pages: Dashboard, Pending Approval, Approved Timesheets, Manage My Engagements, and Reports. Screenshots and detailed descriptions are provided for each page.

Manager's Dashboard

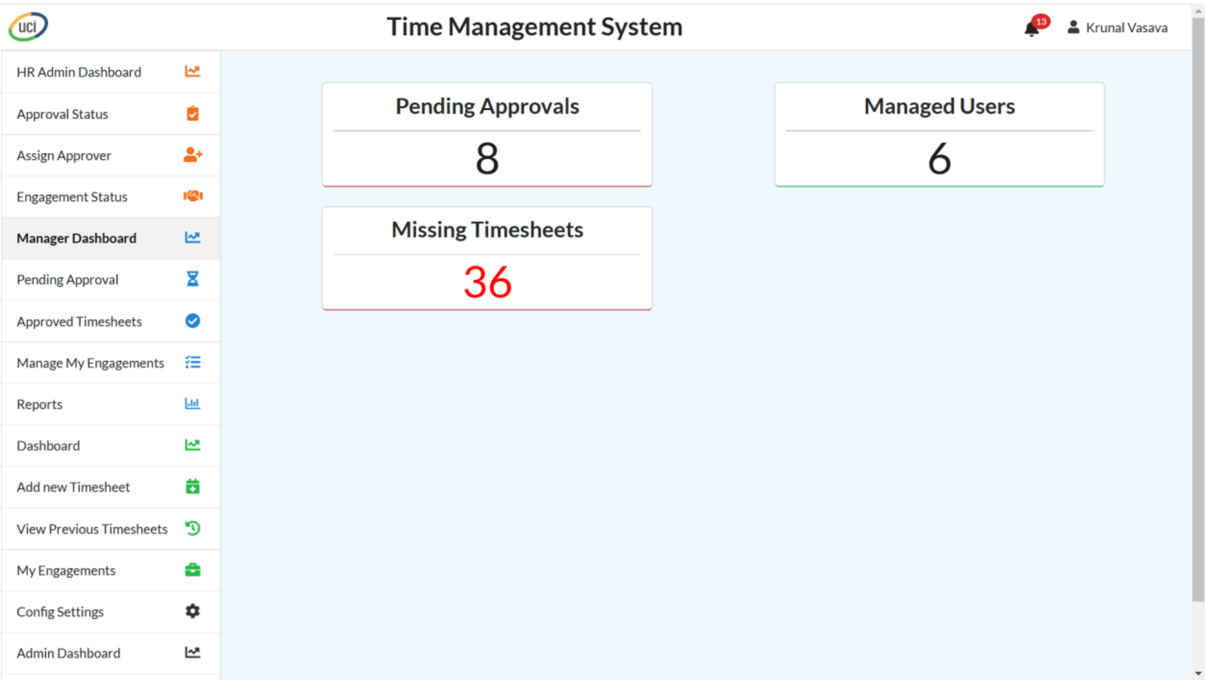
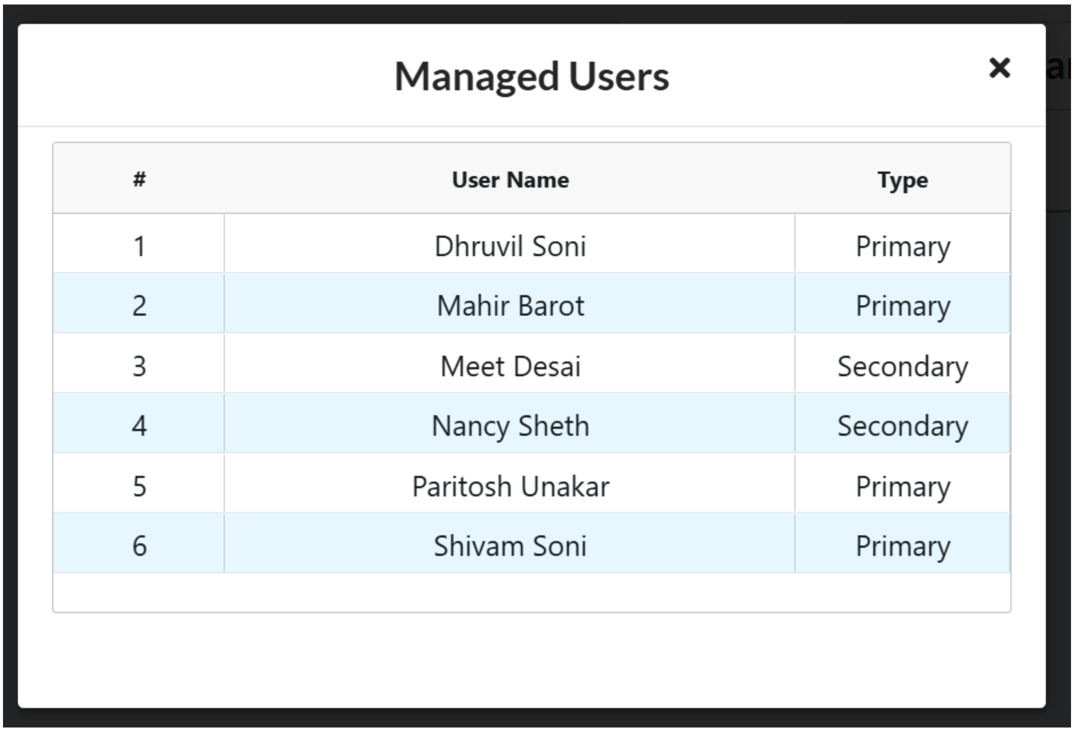


Fig 4.1 - Manager's Dashboard

The Manager's Dashboard serves as the central hub for managers to monitor their timesheet and engagement-related activities. It includes the following cards:

- **Pending Approval Count**: Displays the total number of timesheets awaiting the manager's approval.
- **Managed Users Count**: Shows the number of employees under the manager's supervision, either as a primary or secondary approver.
- **Missing Timesheets Count**: Indicates the number of timesheets that employees under the manager have not yet submitted.



Managed Users

#	User Name	Type
1	Dhruvil Soni	Primary
2	Mahir Barot	Primary
3	Meet Desai	Secondary
4	Nancy Sheth	Secondary
5	Paritosh Unakar	Primary
6	Shivam Soni	Primary

Fig 4.2 - Manager's Dashboard – Managed Users Popup

- Clicking on the **Managed Users Count** opens a popup displaying a list of employees supervised by the manager, including those for whom the manager is either a primary or secondary approver.

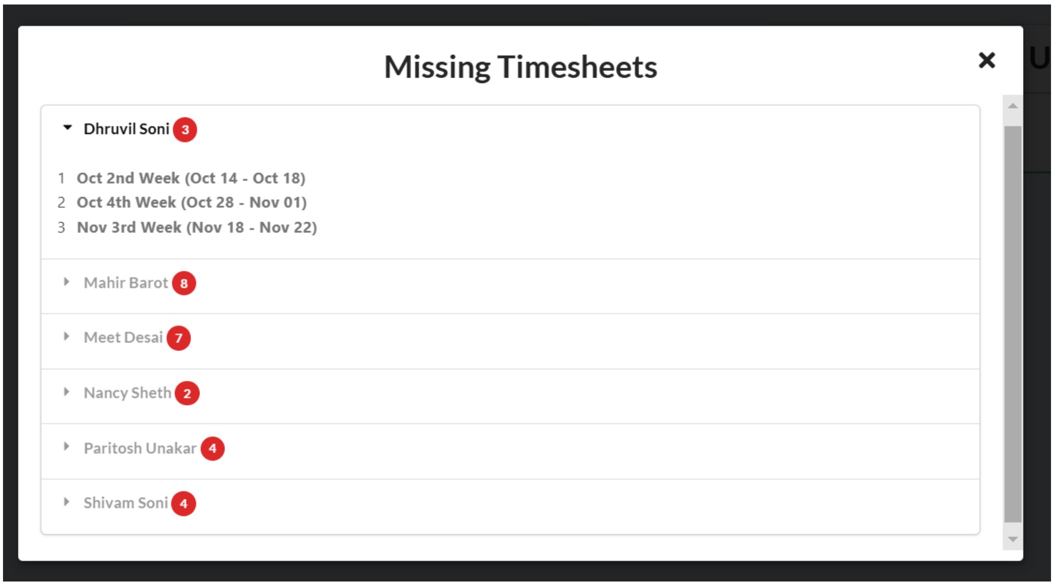


Fig 4.3 - Manager's Dashboard – Missing Timesheets Popup

- Clicking on the **Missing Timesheets Count** opens a popup showing a list of pending timesheets for each employee under the manager. This allows the manager to identify employees who have not submitted their timesheets.

Pending Approval

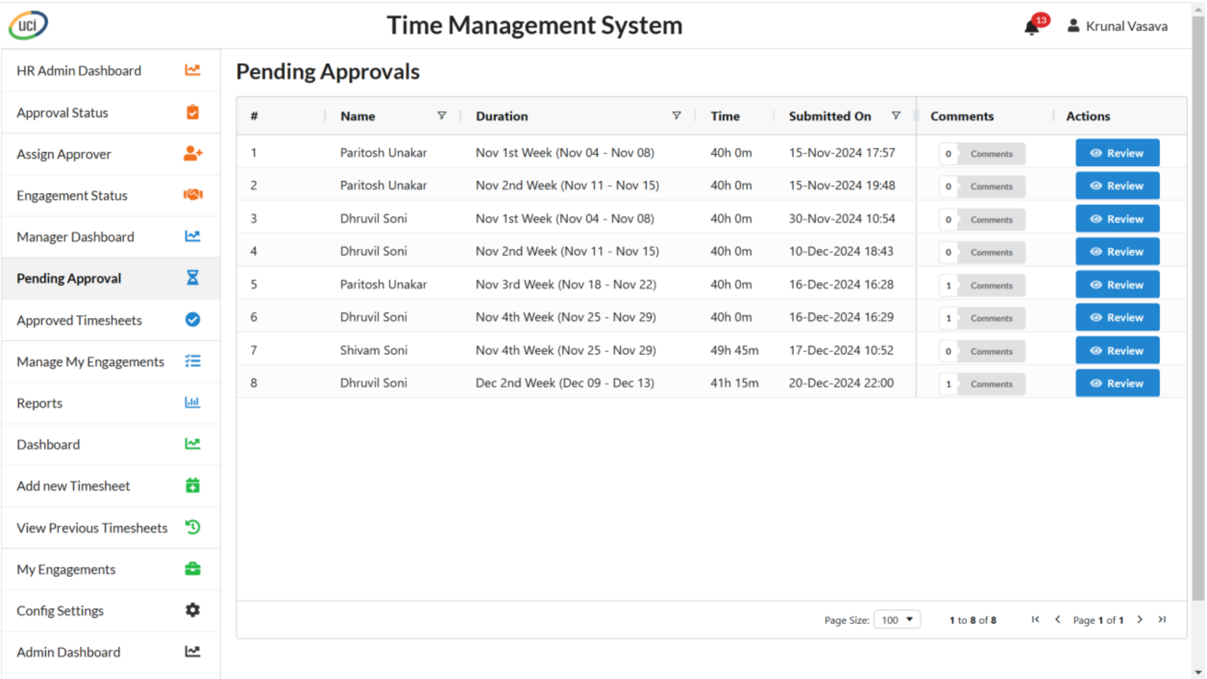


Fig 4.4 - Pending Approval Page

The "Pending Approval" page provides a list of submitted timesheets by the manager's team members that are pending for approval. Key features include:

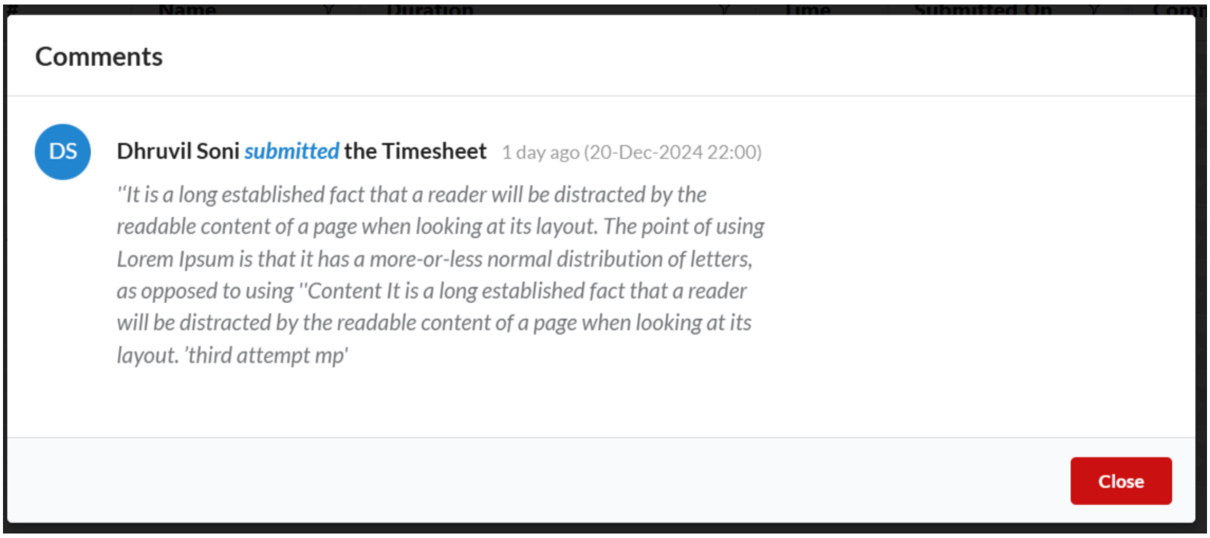


Fig 4.5 - Pending Approval – Comments popup

- **Comments Button**: Clicking this button opens a popup showing all comments associated with the timesheet, such as submission, rejection, and approval comments.

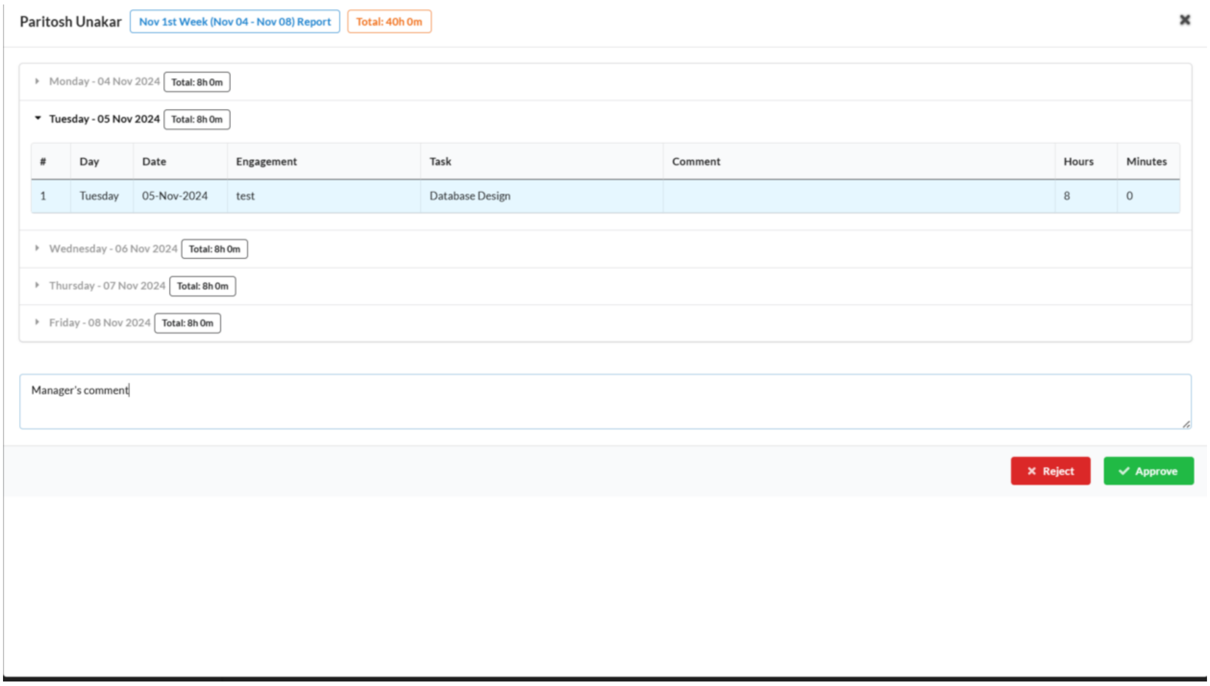


Fig 4.6 - Pending Approval – Review popup

- **Review Button**: Clicking this button opens a detailed view of all entries in the weekly timesheet on a daily basis. The manager can:
  - Review timesheet details.
  - Add comments in the provided comment box.
  - Approve or reject the timesheet using the respective buttons.
  - If rejected, the employee receives an automated rejection email with the rejection comment.

Approved Timesheets

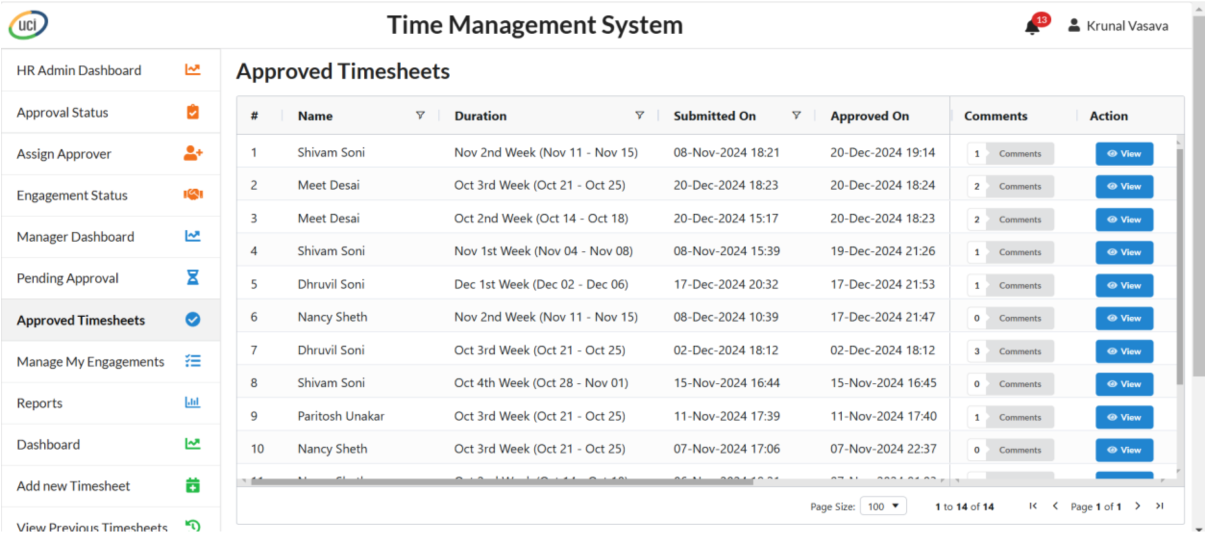


Fig 4.7 - Approved Timesheets Page

The "Approved Timesheets" page is a view-only page where managers can:

- See a list of timesheets they have approved.
- View comments associated with each timesheet.
- Use the "View" button to open the detailed timesheet entries for a specific week.

Manage My Engagement

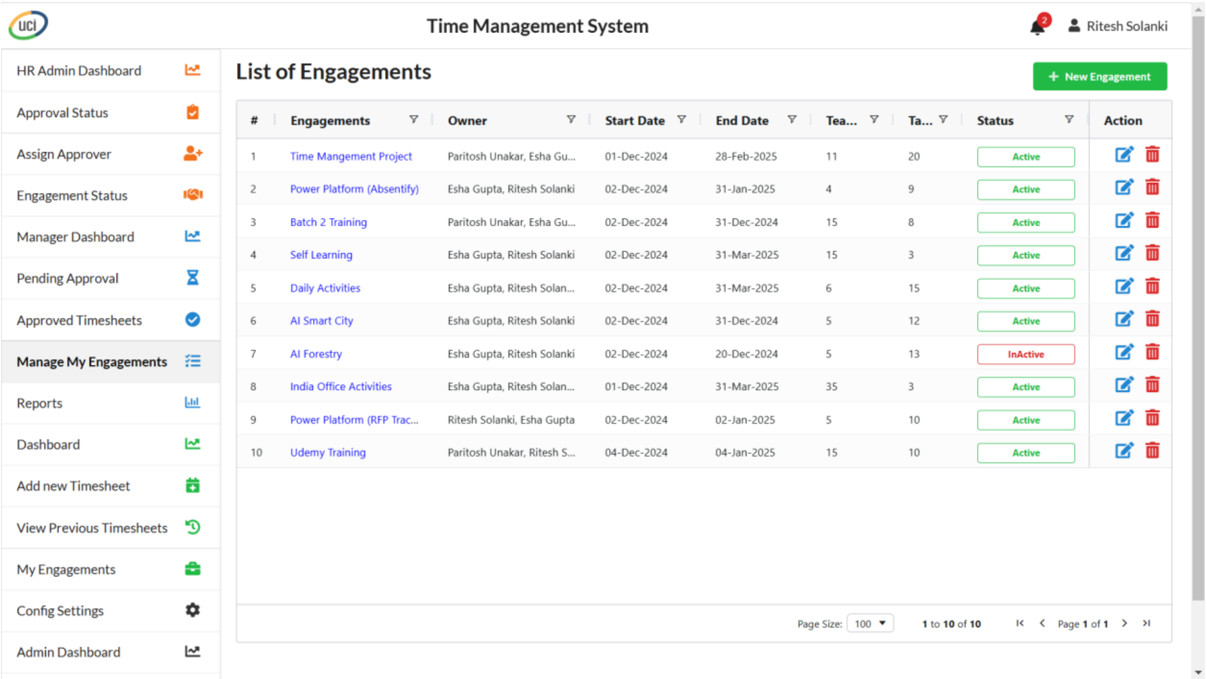


Fig 4.8 - Manage My Engagement Page

The "Manage My Engagement" page is the most crucial and feature-rich page for managers. Key functionalities include:

- **View Engagements**: The manager can view a list of:
  - Engagements they created.
  - Engagements where they are assigned as an owner.

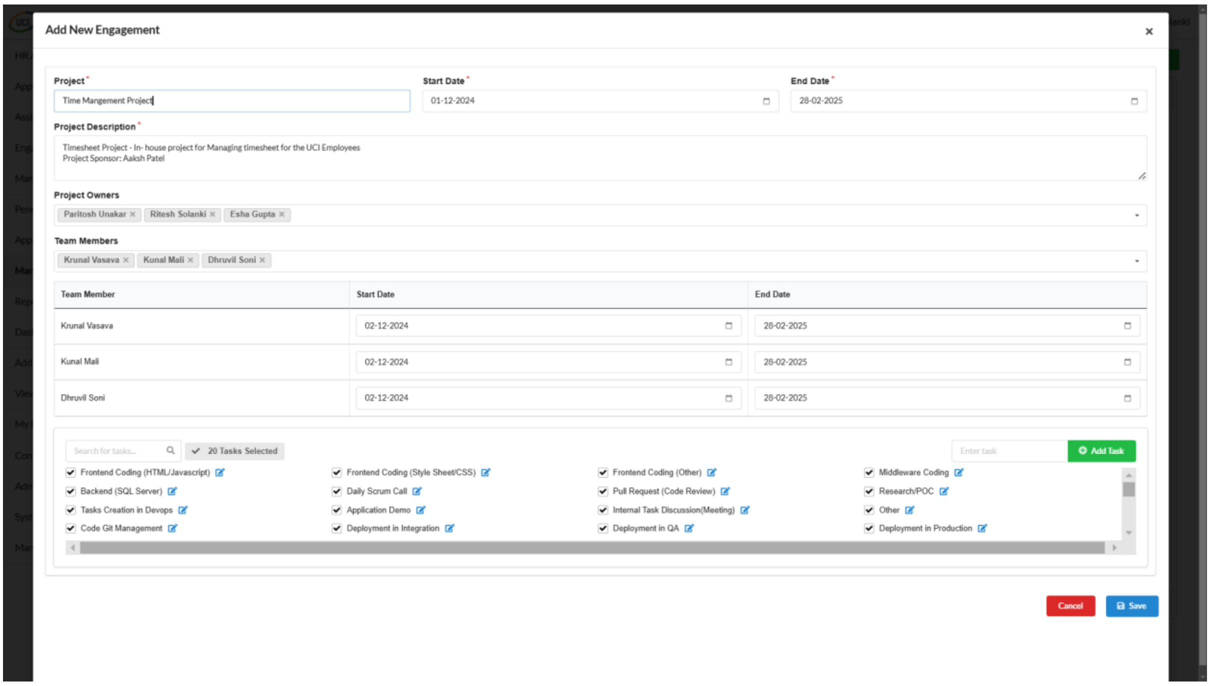


Fig 4.9 - Manage My Engagement – Add new engagement popup

- **Add new Engagement**: Managers can create new engagements by providing:
  - Title
  - Description
  - Start Date and End Date
  - Team Members
  - Owners
  - Tasks
- Manager can add team member's specific start date and end date also in an engagement. By Default, its same as engagement start date and end date.
- If Manager can't find any suitable task to add in tasks area for an engagement, can also add custom task using "Add Task" button.

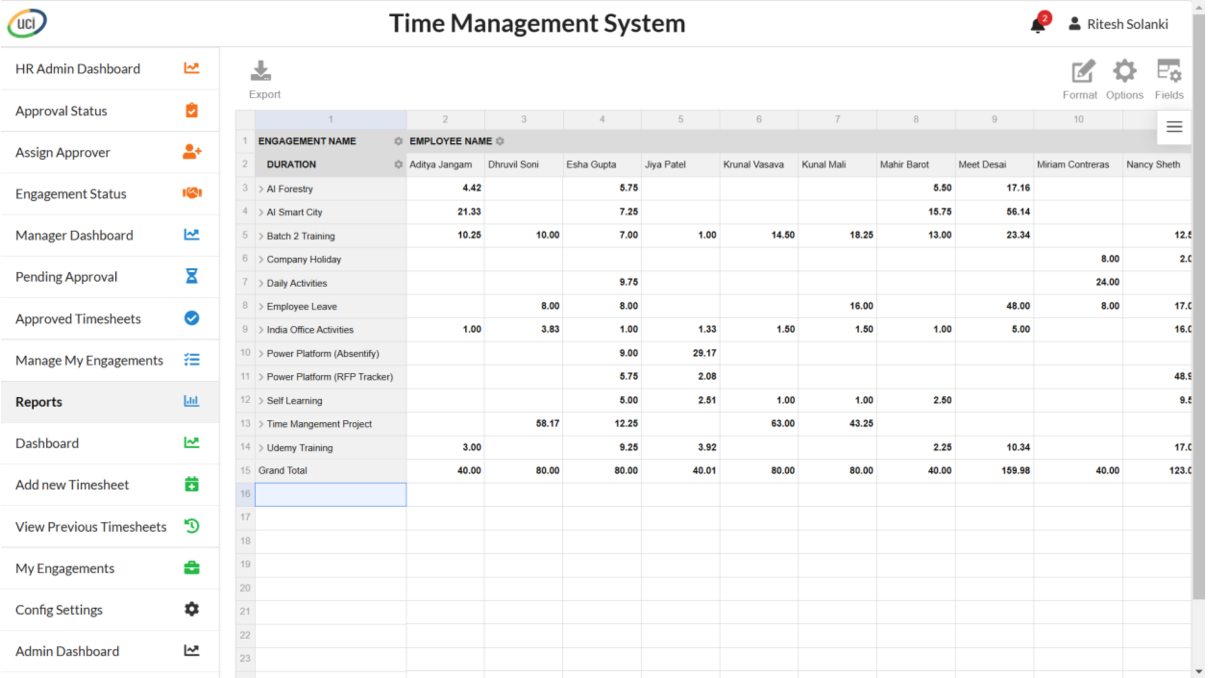
  Once an engagement is created, team members can log their timesheets against it.

#	Engagements	Owner	Start Date	End Date	Tea...	Ta...	Status	Action
1	Time Mangement Project	Paritosh Unakar, Esha Gu...	01-Dec-2024	28-Feb-2025	11	20	Active	
2	Power Platform (Absentify)	Esha Gupta, Ritesh Solanki	02-Dec-2024	31-Jan-2025	4	9	Active	

Fig 4.10 - Manage My Engagement – Edit / Delete buttons

- **Edit or Delete Engagements**:
  - **Edit**: Allows the manager to modify engagement details.
  - **Delete**: If the engagement has not been used in any submitted timesheet, it can be deleted successfully. Otherwise, the system shows an error popup with a list of timesheets that have used the engagement.

Reports



ENGAGEMENT NAME / DURATION	Aditya Jangam	Dhruvil Soni	Esha Gupta	Jiya Patel	Krunal Vasava	Kunal Mali	Mahir Barot	Meet Desai	Miriam Contreras	Nancy Sheth
> AI Forestry	4.42		5.75				5.50	17.16		
> AI Smart City	21.33		7.25				15.75	56.14		
> Batch 2 Training	10.25	10.00	7.00	1.00	14.50	18.25	13.00	23.34		12.5
> Company Holiday									8.00	2.0
> Daily Activities			9.75						24.00	
> Employee Leave		8.00	8.00			16.00		48.00	8.00	17.0
> India Office Activities	1.00	3.83	1.00	1.33	1.50	1.50	1.00	5.00		16.0
> Power Platform (Absentify)			9.00	29.17						
> Power Platform (RFP Tracker)			5.75	2.08						48.9
> Self Learning			5.00	2.51	1.00	1.00	2.50			9.5
> Time Mangement Project		58.17	12.25		63.00	43.25				
> Udemy Training	3.00		9.25	3.92			2.25	10.34		17.0
Grand Total	40.00	80.00	80.00	40.01	80.00	80.00	40.00	159.98	40.00	123.0

Fig 4.11 - Reports Page

The "Reports" page allows managers to generate reports for their team. Key highlights:

- The reports use a pivot table format for advanced data analysis.
- A video tutorial is provided to demonstrate the functionality, simplifying the understanding of this feature.

The Manager module in the TMS empowers managers to oversee their team's timesheet submissions, manage engagements effectively, and generate comprehensive reports. Video tutorials for all modules are available to provide additional guidance and ensure smooth usage of the system.

5. HR’s Portal

The HR module in the Timesheet Management System provides tools for managing and monitoring approvers, timesheet approval status, and engagement details. This chapter details the functionality of the HR's TMS across its four key pages.

HR Admin Dashboard

The HR Admin Dashboard offers an overview of critical timesheet and approver-related metrics, displayed in the form of three cards:

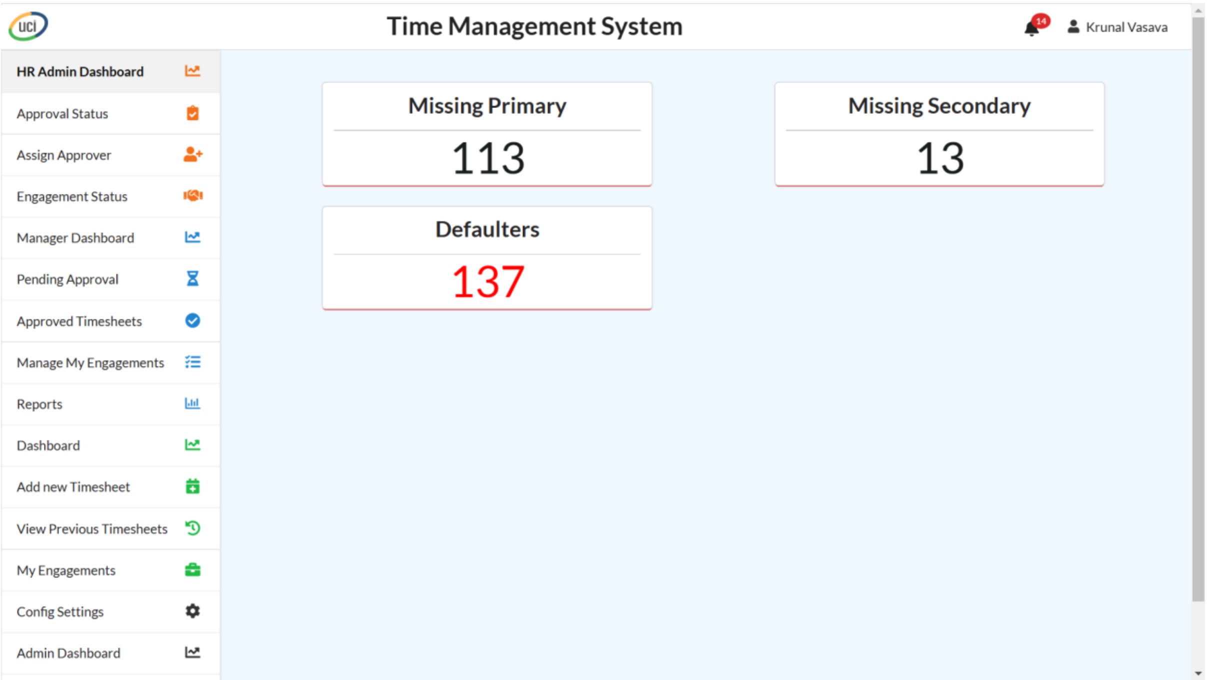


Fig 5.1 – HR Admin Dashboard Page

- **Missing Primary Approver**:
  - Displays the total count of employees without a primary approver assigned.
- **Missing Secondary Approver**:
  - Displays the total count of employees who have a primary approver but no secondary approver.
- **Defaulters**:
  - Displays the count of employees who have not submitted their timesheets for the past two weeks.

Approval Status

The Approval Status page provides a list of timesheets pending for approval, enabling HR to monitor the approval process and notify approvers when necessary.

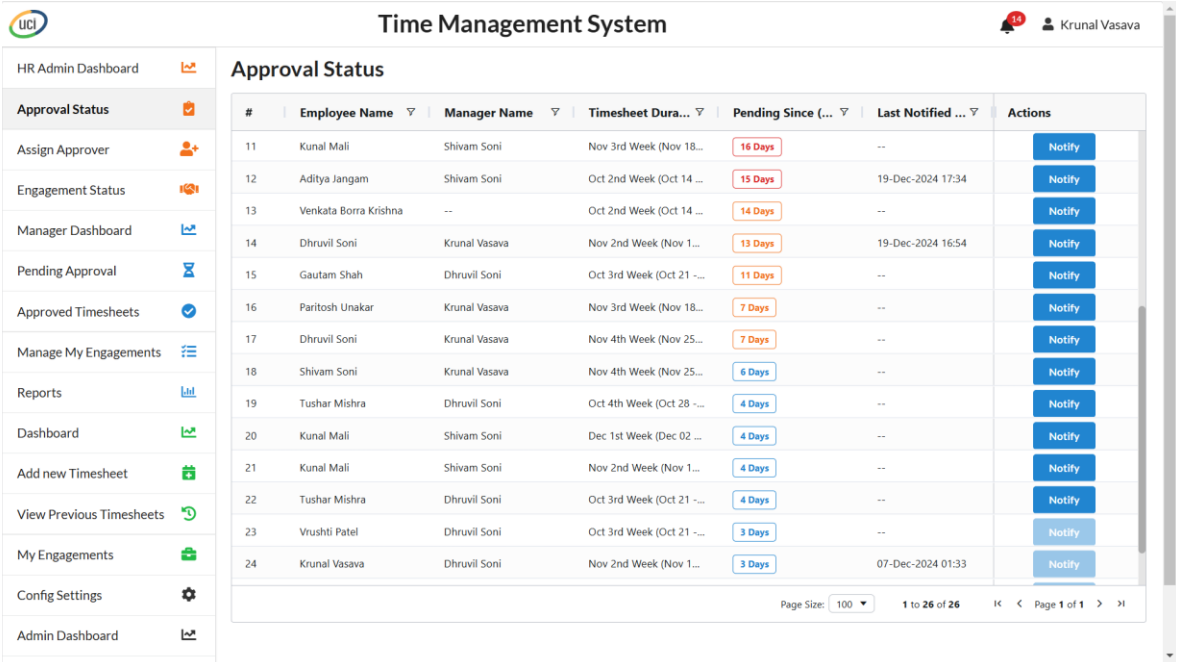


Fig 5.2 – Approval Status Page

- **Pending Timesheets Table**:
  - Displays details such as employee name, manager name, timesheet period, pending since days count, and last notified date.
- **Notify Button**:
  - Available for timesheets pending approval for more than three days.

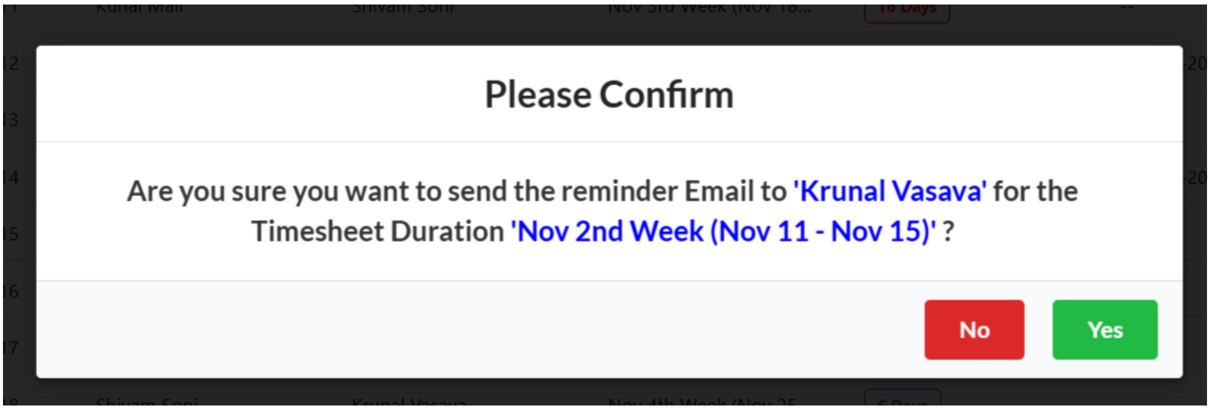


Fig 5.3 – Approval Status Page – confirmation popup

- Clicking the "Notify" button sends an automated email to the primary approver, reminding them to review the pending timesheet.

Assign Approver

This page allows HR to assign or modify primary and secondary approvers for employees, ensuring that every employee has the required approvers assigned.

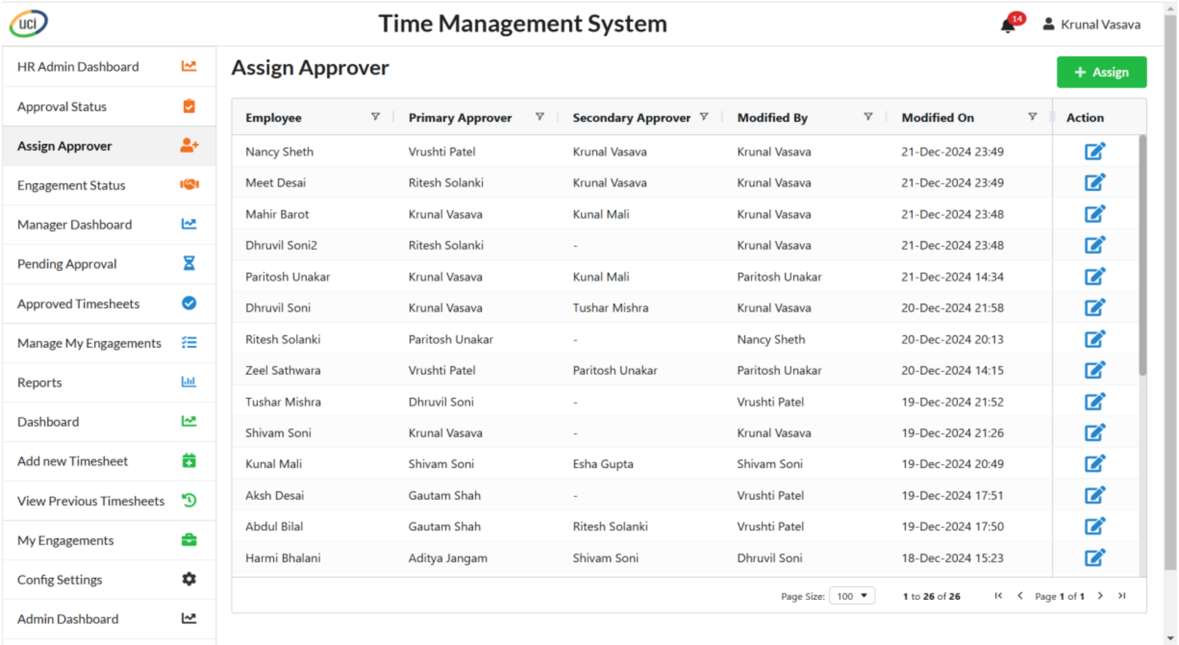


Fig 5.4 – Assign Approver Page

- Displays a list of employees and their corresponding primary and secondary approvers.

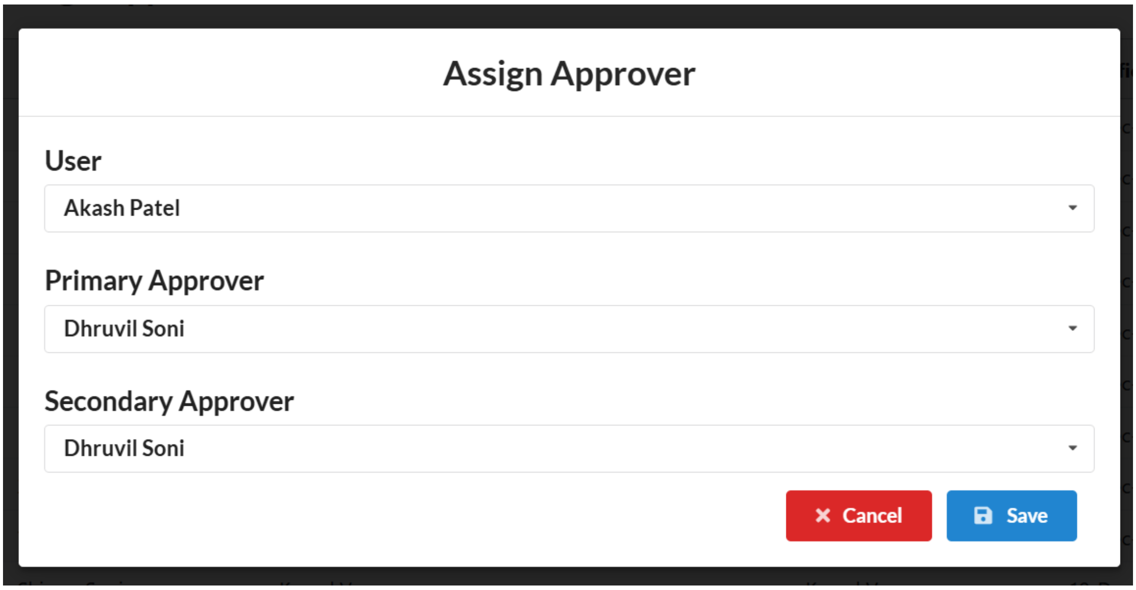


Fig 5.5 – Assign Approver Popup

- Clicking the "Assign" button opens a popup where HR can assign primary and/or secondary approvers to employees who currently lack them.

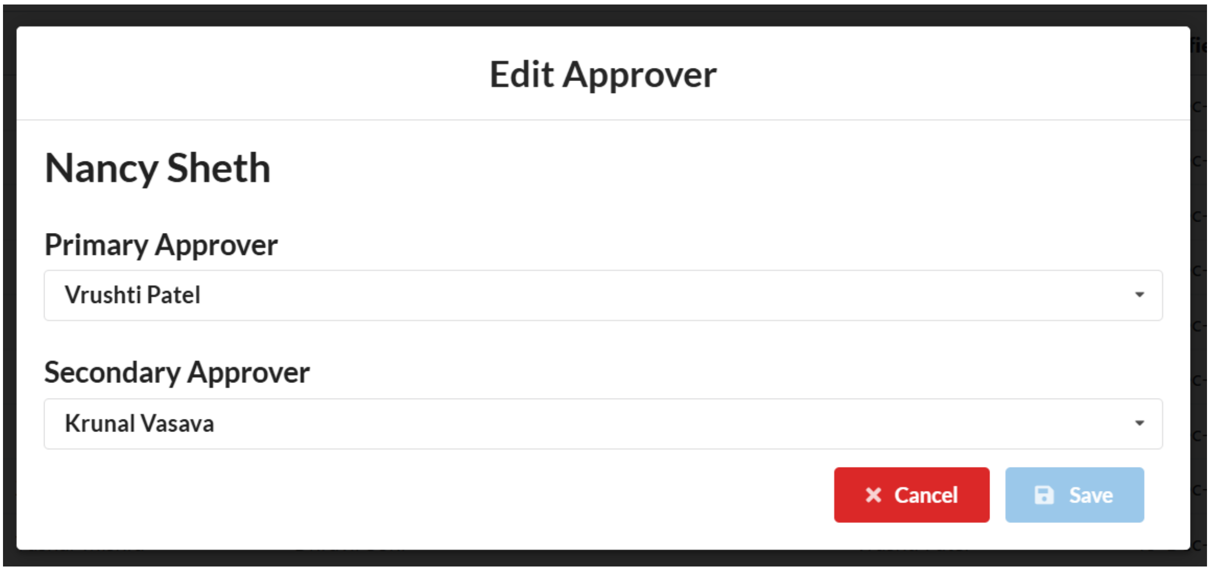


Fig 5.6 – Edit Approver Popup

- Each row contains an "Edit" button. Clicking it enables HR to modify the approvers assigned to the selected employee.

Validations:

- Primary approver is mandatory but secondary approver is optional.
- Only people with Manager right can become Primary approver.
- Anyone in the system can become Secondary approver.
- Primary approver and Secondary approver can't be same.

Engagement Status

The Engagement Status page provides HR with an overview of all engagements within the system. It is a view-only page with detailed information available on demand.

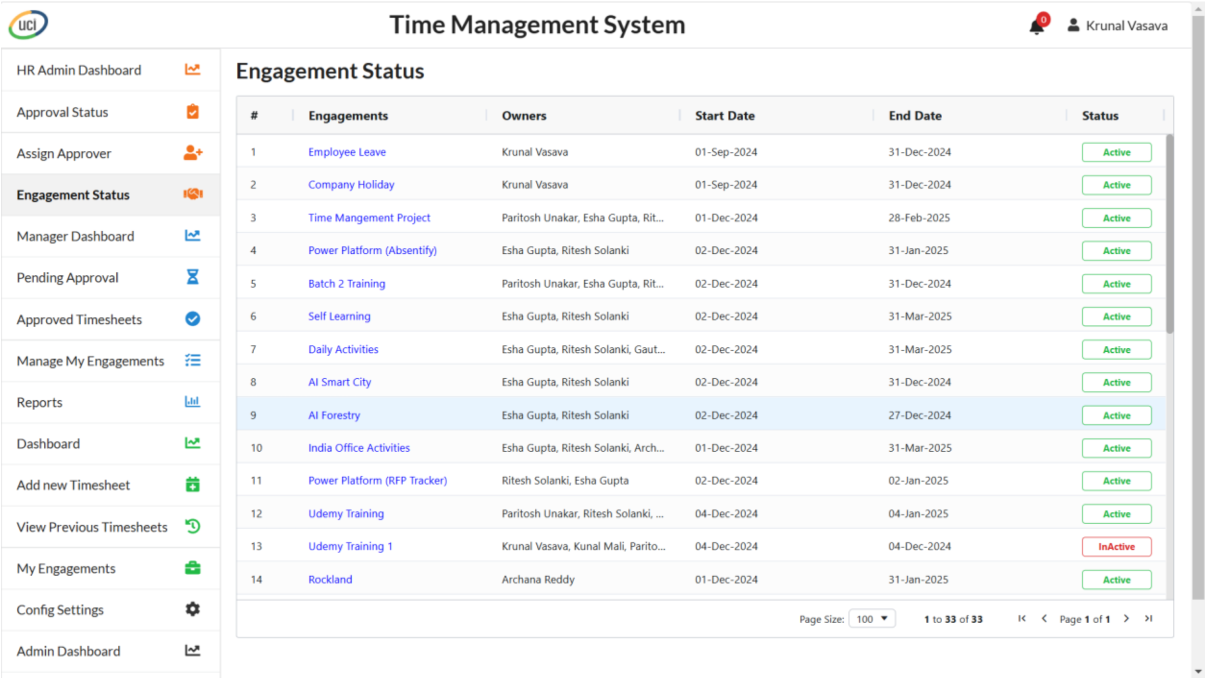


Fig 5.7 – Engagement Status Page

- **Engagement List:**
  - Displays a list of all engagements, including their title, start date, end date, owner, and current status.

- **Engagement Details Popup**:

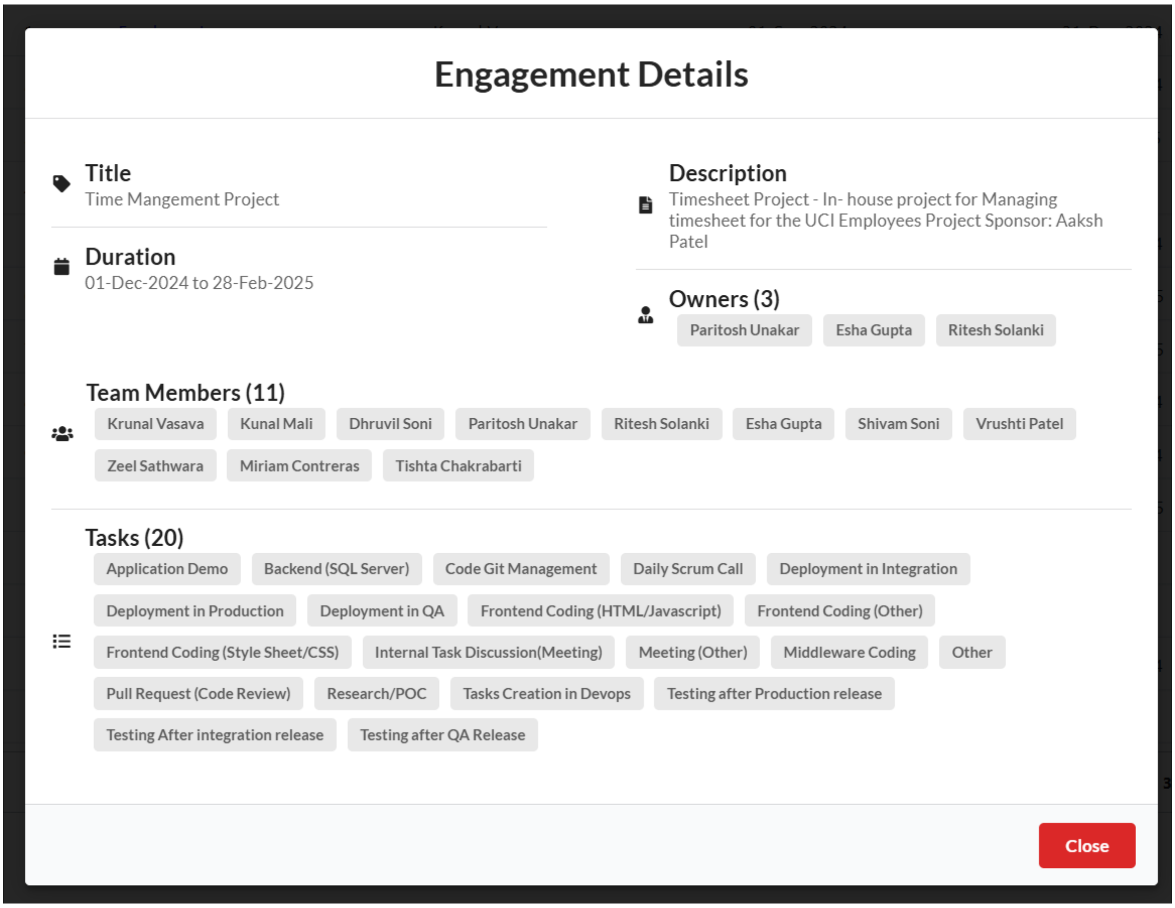


Fig 5.8 – Engagement Details Popup

- Clicking on an engagement name opens a popup with detailed information about the selected engagement, including:
    - Title
    - Description
    - Duration
    - Team Members
    - Tasks
    - Owners

6.Notification Module

The notification module in the Timesheet Management System (TMS) serves as a robust communication mechanism. It is divided into two main types: Mail Notifications and Bell Icon Notifications. This chapter provides a detailed overview of both types of notifications, including their implementation and usage.

Mail Notifications

Mail notifications are used to communicate specific updates and alerts via email. The following types of mail notifications are implemented:

1. Daily Pending Timesheets Mail

- **Description**: Every day, managers receive an email containing a list of newly submitted timesheets that are pending their approval.
- **Purpose**: To ensure managers are promptly informed about pending tasks.
- **Screenshot**:

SU System User<donotreply@uciny.net>
To: Ritesh Solanki

Reply Reply all Forward ···
Mon 16/12/2024 17:57

Dear **Ritesh Solanki**,

Following Timesheets were submitted today for your review.

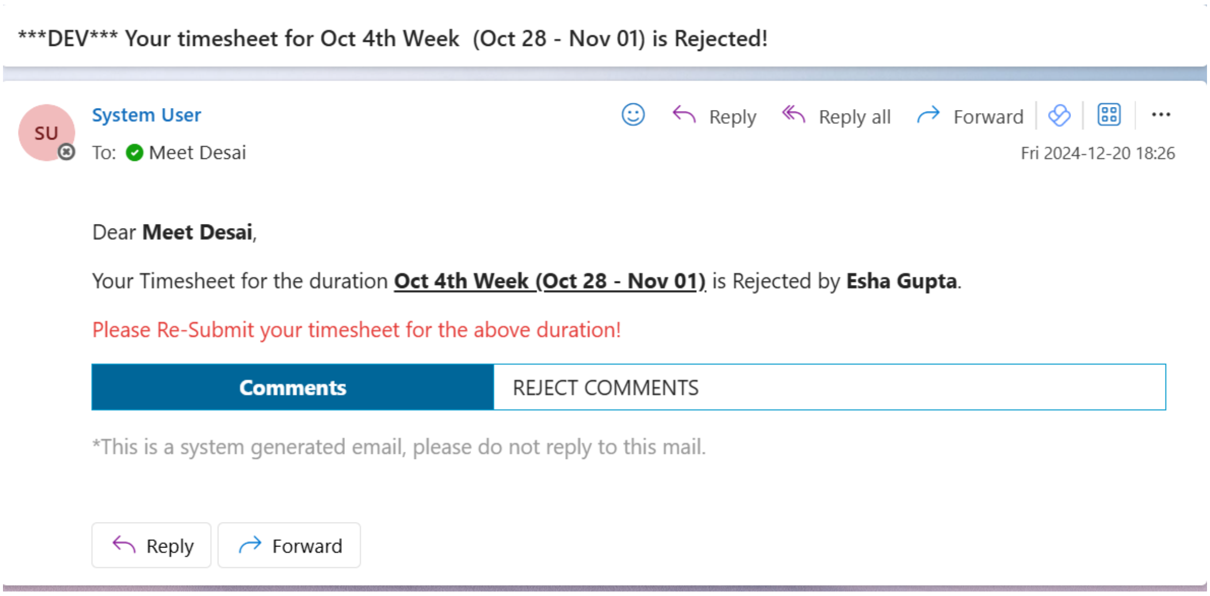
Click Here To Review

#	Name	Duration	Submitted On	Submission Comment
1.	Meet Desai	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 5:41:47 AM	Week 2 - Time sheet Submitted
2.	Dhruvil Soni	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 8:03:05 AM	Hello Ritesh Sir, This is the timesheet of Dec 2nd Week (Dec 09 - Dec 13) submitted by Dhruvil Soni
3.	Paritosh Unakar	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 8:05:14 AM	December 2nd week TS submitted
4.	Tushar Mishra	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 8:40:07 AM	
5.	Vrushti Patel	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 8:43:47 AM	
6.	Nancy Sheth	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 9:55:27 AM	
7.	Krunal Vasava	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 10:32:37 AM	Dec 2nd Week Timesheet submitted
8.	Shivam Soni	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 10:54:03 AM	Last week timesheet
9.	Zeel Sathwara	Dec 2nd Week (Dec 09 - Dec 13)	12/16/2024 10:55:30 AM	

Fig 6.1 – Daily Pending Timesheets Mail

2. Rejected Timesheet Mail

- **Description**: If a manager rejects an employee's timesheet, the employee receives an email notification about the rejection.
- **Purpose**: To inform employees about the rejection and provide reasons if included.
- **Screenshot**:



DEV Your timesheet for Oct 4th Week (Oct 28 - Nov 01) is Rejected!

SU System User
To: Meet Desai
Reply | Reply all | Forward
Fri 2024-12-20 18:26

Dear **Meet Desai**,

Your Timesheet for the duration **Oct 4th Week (Oct 28 - Nov 01)** is Rejected by **Esha Gupta**.

Please Re-Submit your timesheet for the above duration!

Comments	REJECT COMMENTS

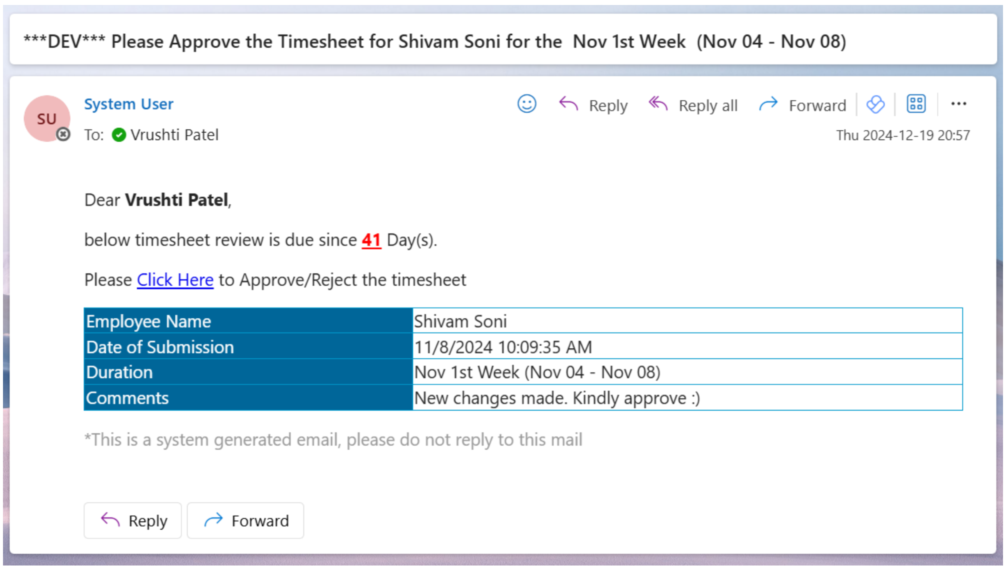
*This is a system generated email, please do not reply to this mail.

Reply | Forward

Fig 6.2 – Rejected Timesheets Mail

3. Notify Approver Mail

- **Description**: When HR notifies an approver from the "Assign Approver" page, the approver receives an email notification.
- **Purpose**: To remind the approver to review the pending timesheets.
- **Screenshot**:



DEV Please Approve the Timesheet for Shivam Soni for the Nov 1st Week (Nov 04 - Nov 08)

SU System User
To: Vrushti Patel
Reply | Reply all | Forward
Thu 2024-12-19 20:57

Dear **Vrushti Patel**,

below timesheet review is due since **41** Day(s).

Please Click Here to Approve/Reject the timesheet

Employee Name	Shivam Soni
Date of Submission	11/8/2024 10:09:35 AM
Duration	Nov 1st Week (Nov 04 - Nov 08)
Comments	New changes made. Kindly approve :)

*This is a system generated email, please do not reply to this mail

Reply | Forward

Fig 6.3 – Notify Approver Mail

Bell Icon Notifications

Bell icon notifications provide real-time alerts within the TMS application. These notifications are displayed under the bell icon on the UI and are categorized based on the recipient's role and the triggering event.

1. Employee Notifications

The following events trigger notifications for employees:

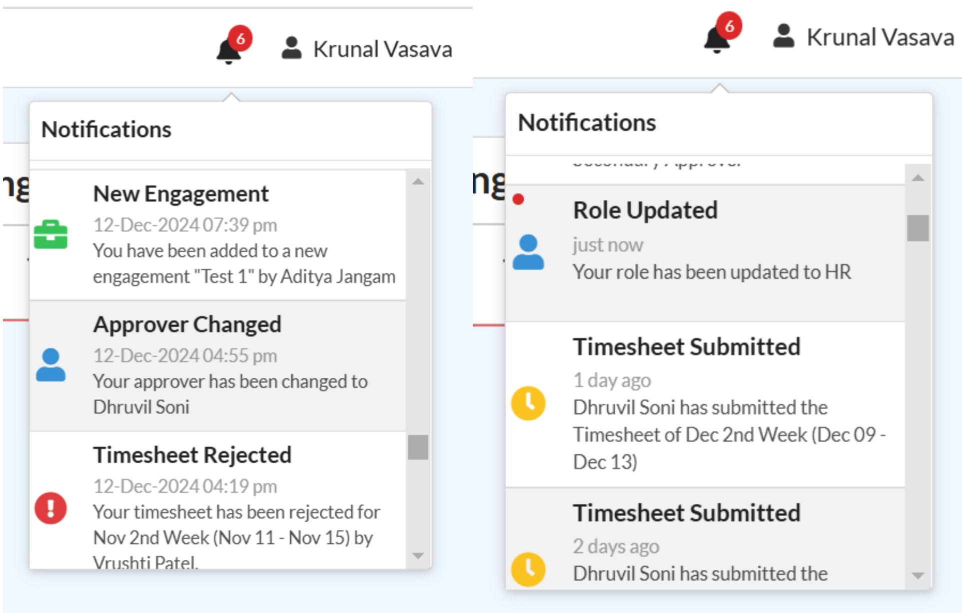
- **Approved Timesheet**: Employee is notified when their timesheet is approved.
- **Rejected Timesheet**: Employee is notified when their timesheet is rejected.
- **Approver Change**: Employee is notified if their primary or secondary approver is updated.
- **Role Change**: Employee is notified if their role in the system changes.
- **Added in Engagement**: Employee is notified when they are added to a new engagement.

2. Manager Notifications

The following events trigger notifications for managers:

- **Employee Submitted New Timesheet**: Manager is notified when an employee submits a new timesheet.
- **Added as Co-owner in an Engagement**: Manager is notified when they are added as a co-owner in an engagement.

Screenshots



This concludes the documentation for the notification module. Please review and provide feedback for any additional requirements or modifications.