Work Time Pro

Admin Guide

INTRODUCTION

The purpose of this guide is to present the concept of Work Time Pro and explain what you should do as part of the configuration process. Work Time Pro is a timekeeping solution that provides a convenient way to track, audit, and analyze employee time using timesheets and time-off requests. From a technical point of view, Work Time Pro is a SharePoint-hosted app, which means that all data is stored securely in the customer's SharePoint environment.

INSTALLATION

Download the trial version

You can download a fully functional 30-day trial version via the app installation package and SharePoint App Catalog. The app is installed in the context of a specific SharePoint Site (e.g. main intranet site or IT Site). The installation procedure is described on the product site (the blue button “Get Free Trial”): https://ivero.net/solutions/WorkTimePro/index.html

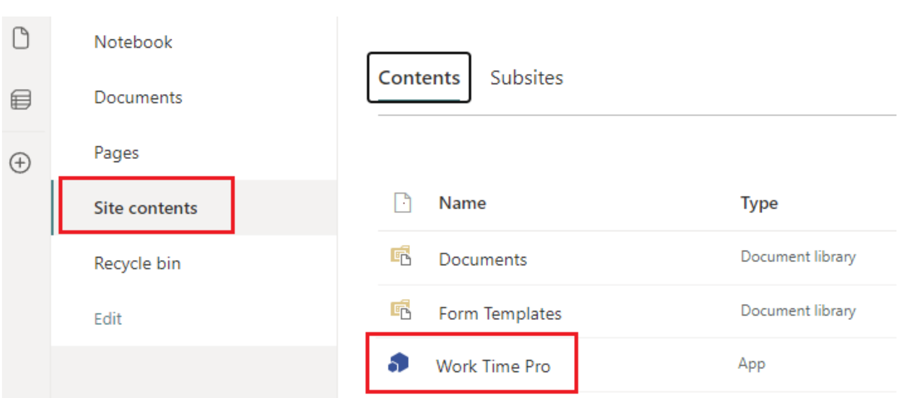
The 30-day trial version is fully functional (there is no difference between the trial and paid version), and there is no limit on number of users during the trial period. You can check the trial expiration date under Administration → General → Subscription.

The user who opens the app for the first time after installation automatically becomes app admin with the ability to assign user roles to others under Administration→ General→ Users.

> **The account you use to install SharePoint apps needs to have "Full Control" permission to the SharePoint Site where the app is installed. You can achieve it via membership in the Site Owners group or adding a user to the "Site Collection Administrators" group.**

Making an app available to users

After succesfull installation, the app is located under “Site Contents” (left menu) on a specific SharePoint Site. You can pin an app to different places (e.g. SharePoint menu, Office 365 app launcher of MS Teams tab), it’s explained in the product FAQ, the question “*How to pin an app to the SharePoint menu, MS Teams, or Office 365 app launcher?*” https://ivero.net/solutions/WorkTimePro/index.html

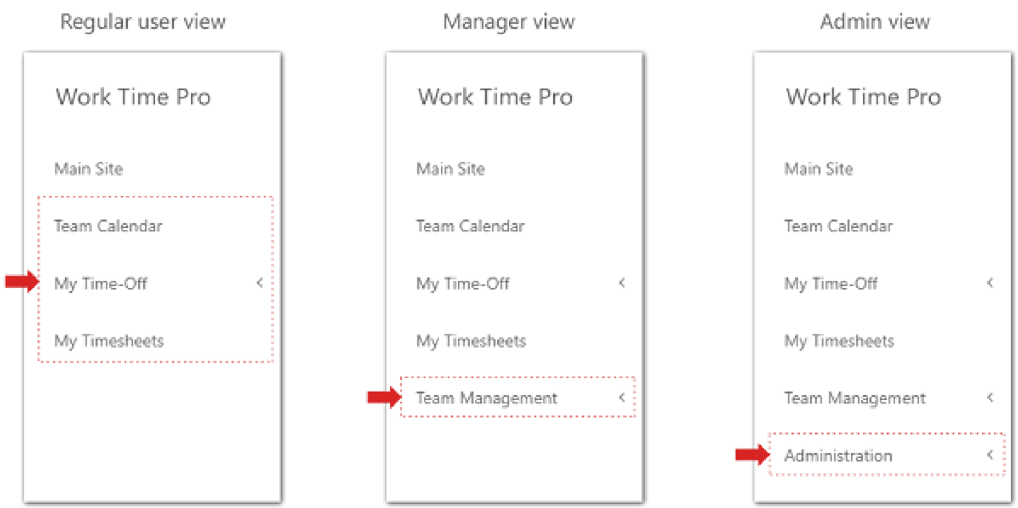


USER ROLES

The app offers three predefined user roles:

- **Regular user** - can submit timesheet and time-off requests and see only own data
- **Manager** - can see data of assigned subordinates under "Team Management" section
- **Administrator** - can see all data under the "Administration" section

Depending on the user role, users see different menu options (presented in the diagram below).

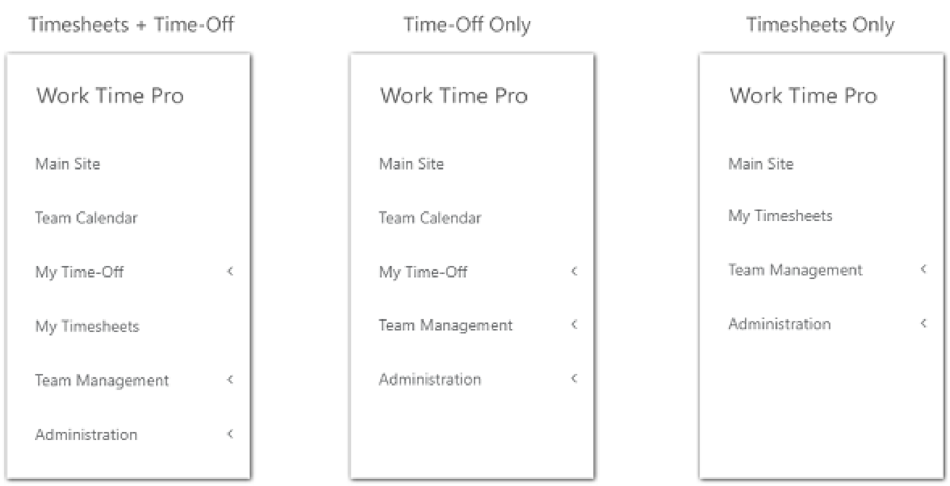


WORK MODES

The app handles both timesheet and time-off requests, but you don't need to use all the modules.

The app can work in one of three work modes (which can be configured under Administration → General → Settings → field "Work Mode"):

- **Time-Off + Timesheets management** (default option) - integrated timesheet and time-off tracking
- **Timesheet management only** - time-off tracking disabled
- **Time-Off management only** - timesheet tracking disabled



MINIMAL CONFIGURATION STEPS

Minimal configuration steps to submit a test time-off request

Here are minimal configuration steps to submit a test time-off request

Step 1) Add at least one team under Administration → General → Teams (e.g. IT)

Step 2) Add at least one location under Administration → General → Locations (e.g. Main Office)

Step 3) Update "Team" field for admin under Administration → General → Users → Edit and optionally create other user profiles

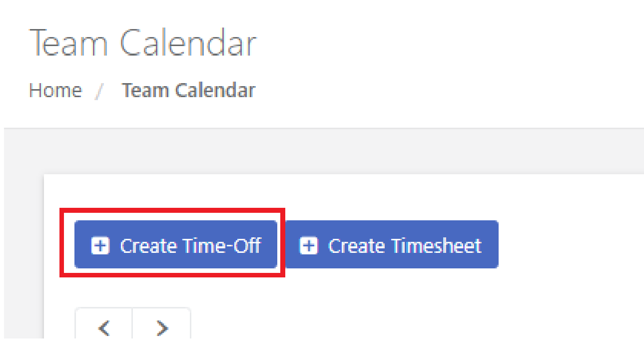
Step 4) Create at least one approval path under Administration → General → Approval Paths

Step 5) Create at least one time-off type (e.g. Vacation) under Administration → Time-Off → Time-Off Types

Step 6) Create at least one entitlement policy under Administration →Time-Off → Entitlement Policies (you can just enter the policy name and click "Save changes" to create a default policy)

Step 7) Assign entitlement to user(s) under Administration → Time-Off → Entitlements

Step 8) Open “Team Calendar” in the left menu and click the button “Create time-off”



Minimal configuration steps to submit a test timesheet request

Here are minimal configuration steps to submit a test timesheet (steps 1-4 are common for time-off and timesheet modules, if you already performed these steps you can go to step 5 at once):

Step 1) Add at least one team under Administration → General → Teams (e.g. IT)

Step 2) Add at least one location under Administration → General → Locations (e.g. Main Office)

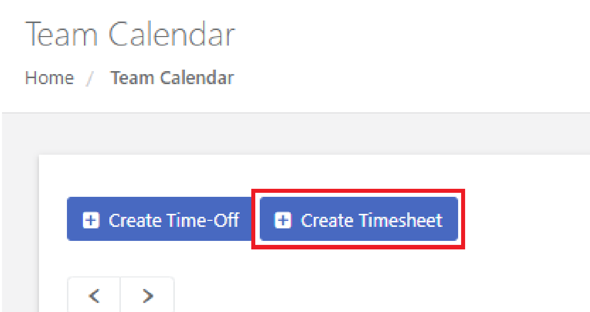
Step 3) Update the "Team" field for admin under Administration → General → Users → Edit and optionally create other user profiles

Step 4) Create at least one approval path under Administration → General → Approval Paths

Step 5) Open view Administration → Timesheets → Settings and click the button “Save General Settings” to apply the approval path on the timesheet module

Step 6) Go to Administration → Timesheets → Projects, click Create → Create one and create at least 1 project with 1 task.

Step 7) Open “Team Calendar” in the left menu (or “My Timesheets” if the time-off module is disabled) and click the button “Create timesheet”



APP CONFIGURATION

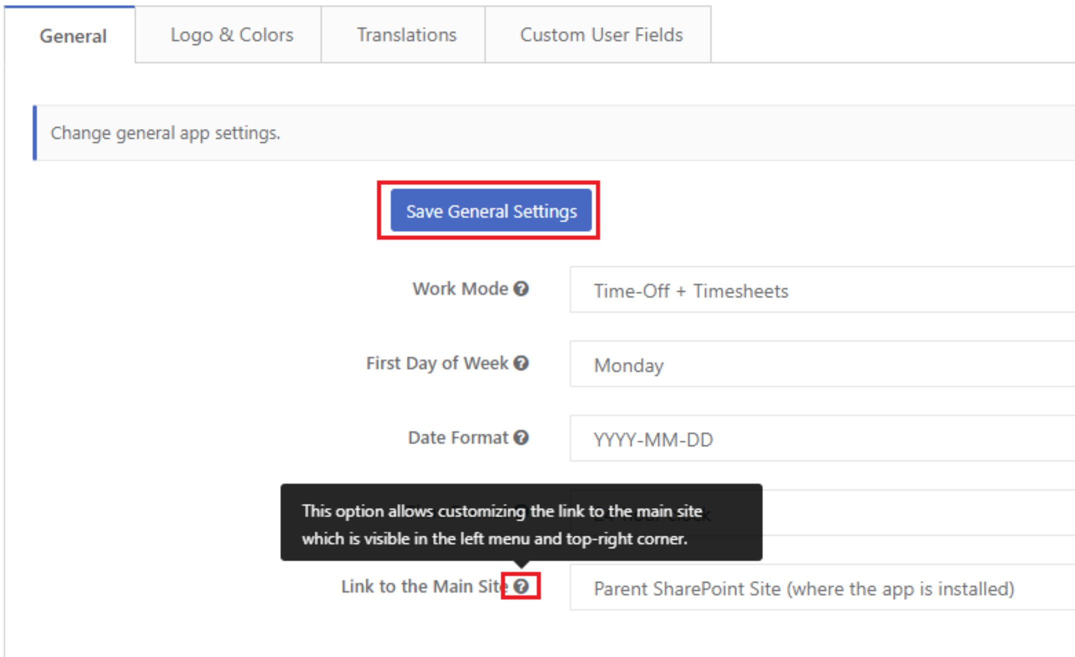
General settings

Step 1) Configure general system settings

You can configure general system settings under Administration → General → Settings

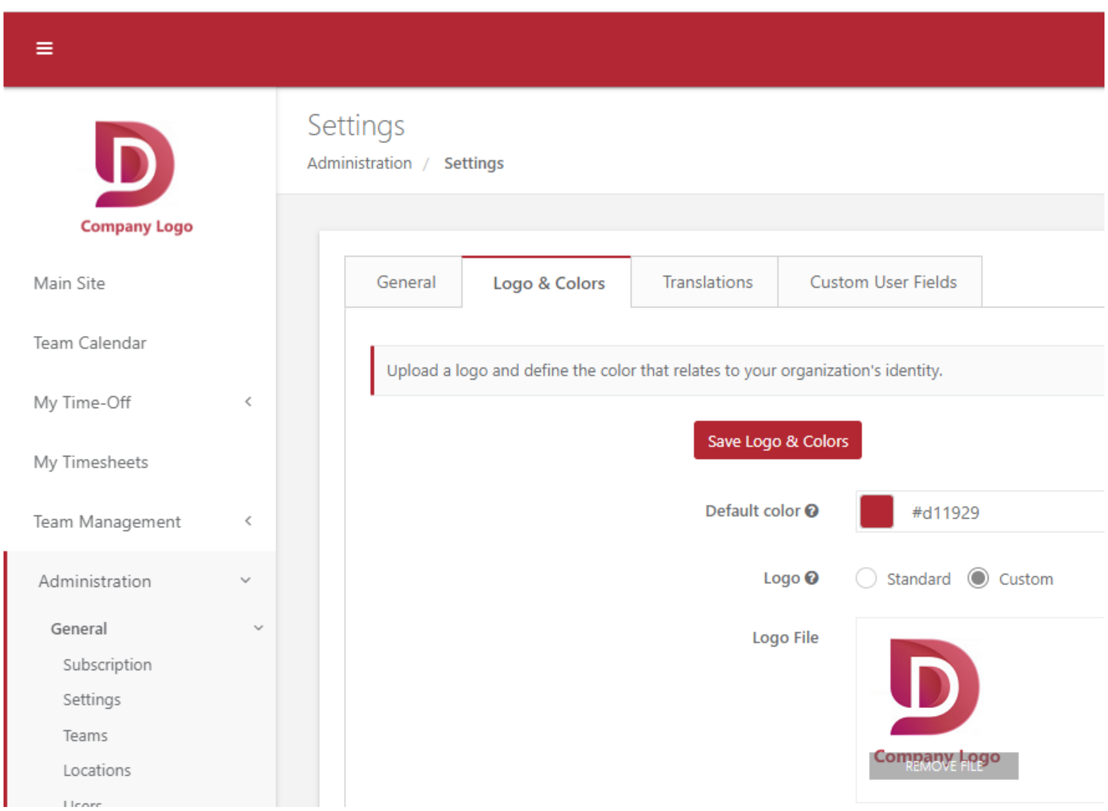
- Tab**"General"** - allows setting up general settings like Work Mode or First Day of the Week.

> **Don’t forget to click the Save button to save changes (this tip applies to each setting page in the app, not only to general settings)**

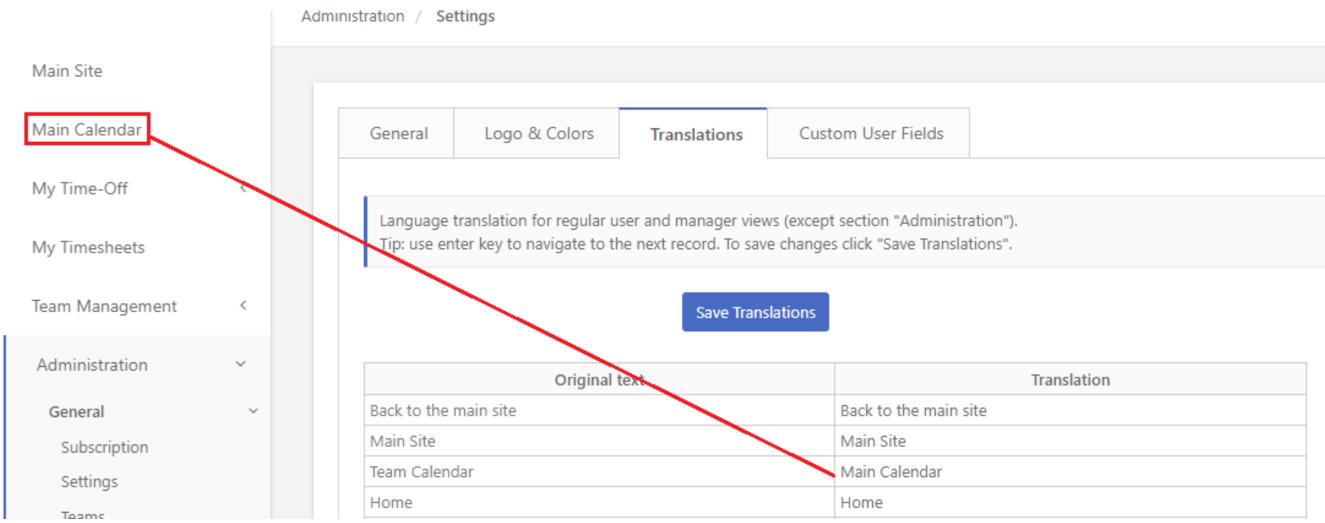


To get more info about a particular setting, move the mouse pointer over the help icon and look at the item tooltip.

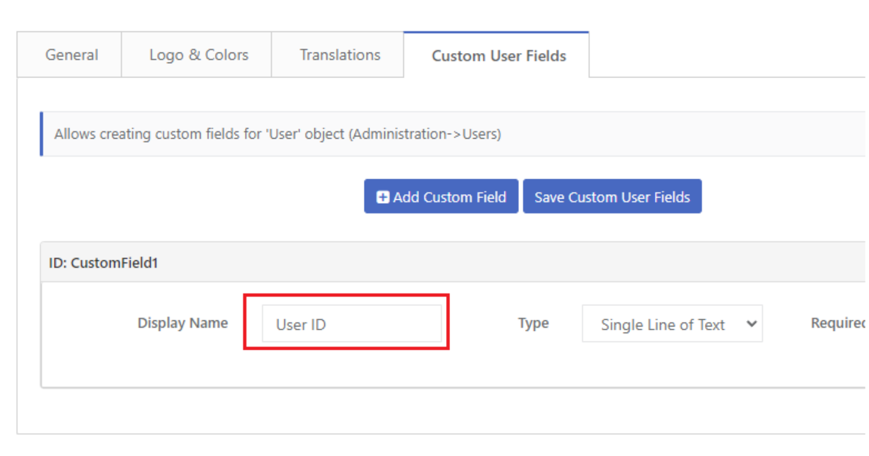
- Tab **"Logo&Colors"** - allows customizing logo&color (main color theme)

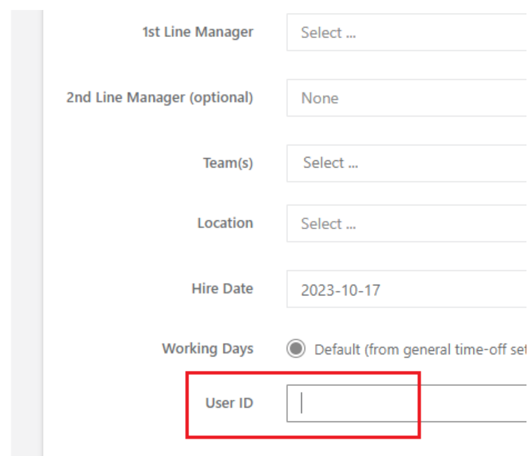


- Tab **“Translations"** - allows language translation for regular user and manager views (except section "Administration").



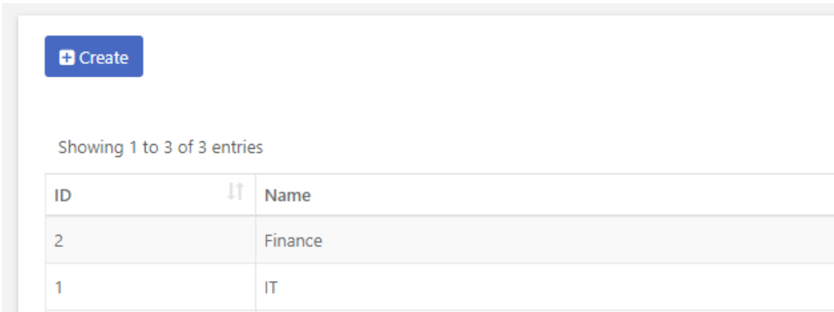
- Tab **“Custom User Fields"** allows adding custom metadata to the “user” object (Administration → General → Users) to store additional metadata like custom User ID.





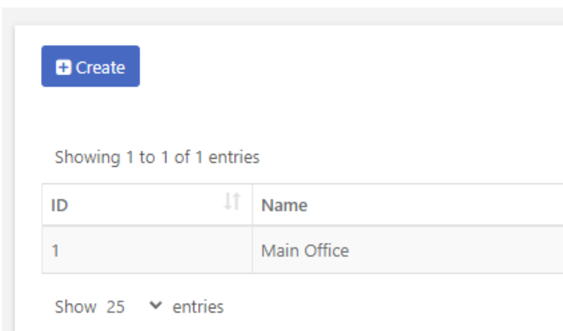
Step 2) Create Teams

You can create teams under Administration → General → Teams. Teams allow define functional groups within your organization (e.g., HR, Sales, IT) and assign them to users. An additional benefit is data filtering by teams - some reports (e.g. “Team Calendar” view) contains a “Team” filter that allows filtering records by specific teams (e.g. “IT” only).



Step 3) Create Locations

You can create locations under Administration → General → Locations. Locations allow creating a dictionary of geographical locations (e.g., country, city) and assigning them to users. Locations allow filtering users by location and optionally assign public holidays to different locations (assuming that you using a time-off module). If your offices are located in the same country and city, you can just enter one, default entry like “Main Office”

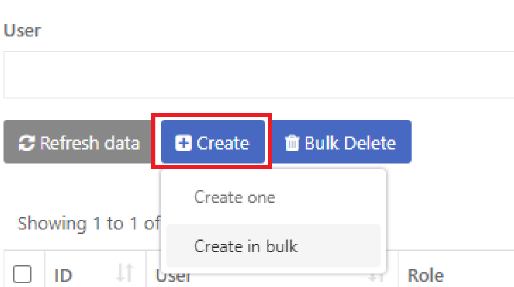


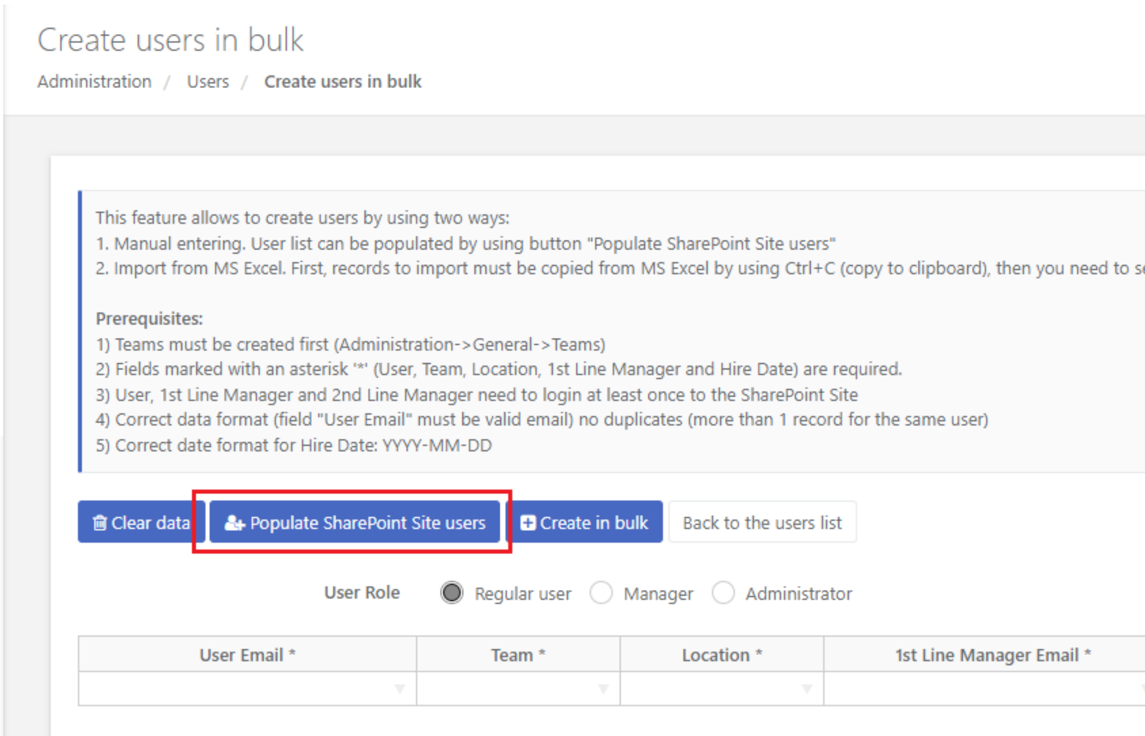
Step 4) Add User Profiles

You can add user profiles under Administration → General → Users, with associated settings, including user role, manager, team, location, and hire date.

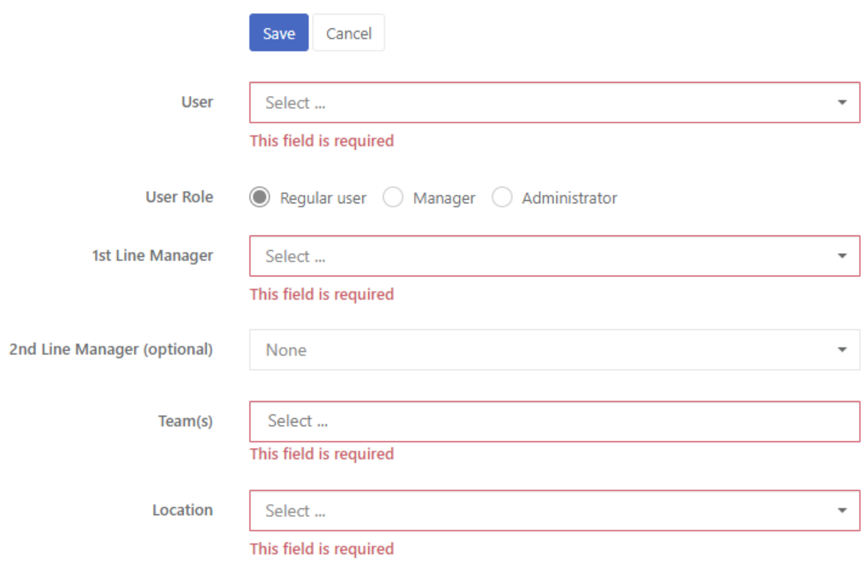
You can create a user profile in one of two modes:

- Create one - by using the standard creation form
- Create in bulk - creating records in an MS Excel-like spreadsheet mode, which supports copy-paste from MS Excel and automatic population of users from SharePoint (button “Populate SharePoint Site) Users”.

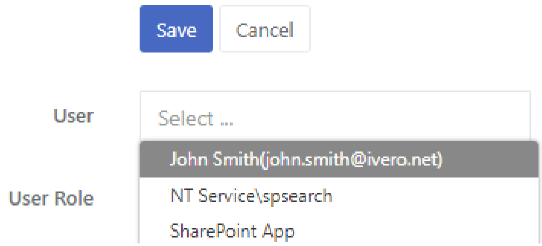




The following fields are required to create a user profile: User, User Role, 1st Line Manager, Team, and Location



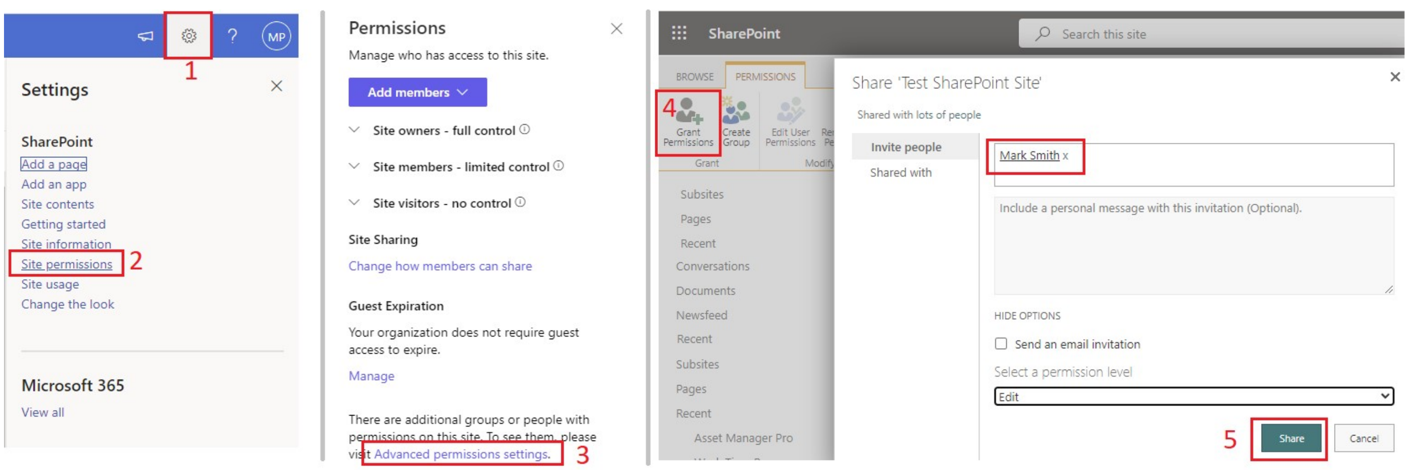
Users in the field “User” are automatically pulled from our SharePoint Site Collection by using a built-in SharePoint feature called “SharePoint User Information List”.



The policy of the User Information List is that the user is added automatically after the first login to the SharePoint Site Collection or when you grant specific permissions for this user (e.g. edit for “John Smith”)

If some new employee is not visible in the drop-down list yet, you can use one of 3 methods to add a new user to the SharePoint Site Collection and make it visible in the app:

1) The User should log in at least once to the SharePoint Site Collection where the app is installed (and no further action is required since the user is added automatically)
2) Adding SharePoint permission, the below illustration explains this process step by step (you can add more than 1 user in this operation, there is no limit)



3) Grant user permission to the Site by using a PowerShell script, here is an example: https://docs.microsoft.com/en-us/answers/questions/416536/user-not-included-in-user-information-list.html

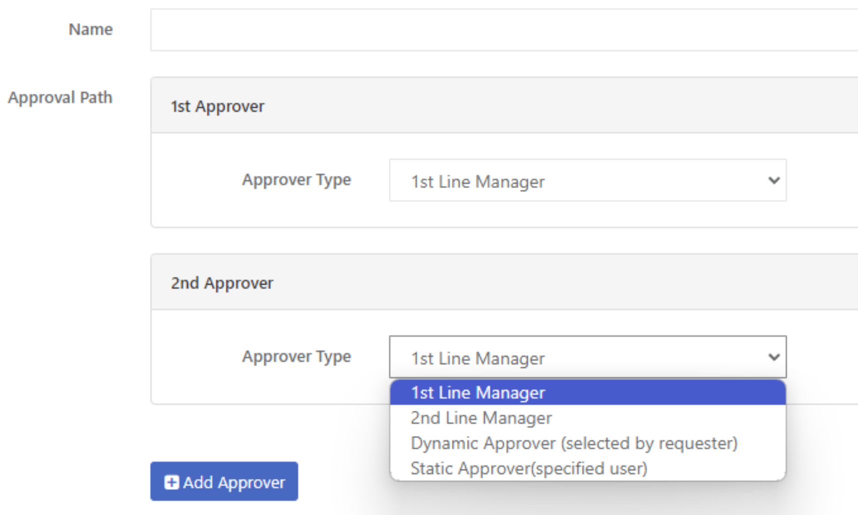
Step 5) Configure Approval Paths

You can configure approval paths under Administration ➔ General ➔ Approval Paths.

Approval paths allow the creation of specific approval paths for time-off requests and timesheets, for example:

- 3-level approval path for timesheets
- 2-level approval path for time-off type “Vacation”

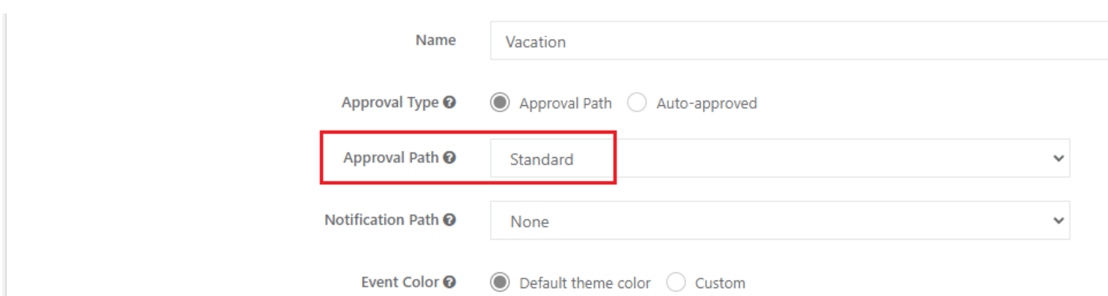
- 1-level approval path for time-off type "Sick Leave"



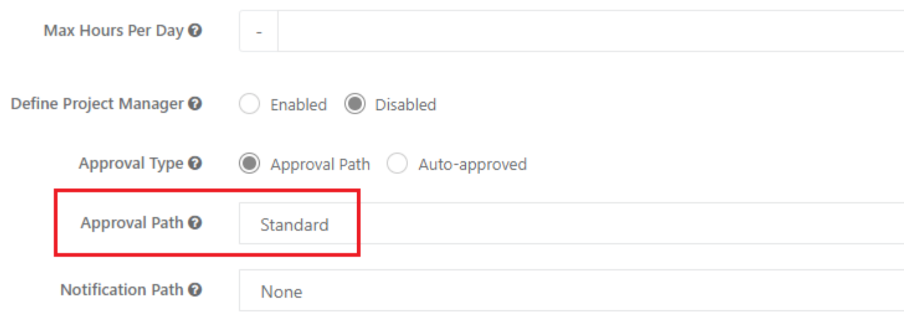
You can define an unlimited number of approvers by clicking on the button "Add Approver":
There are 4 types of approvers:

- **1st Line Manager** (approver taken automatically from user profile: Administration➙ General➙ Users➙ field "1st Line Manager")
- **2nd Line Manager** (approver taken automatically from user profile: Administration➙ General➙ Users➙ field "2nd Line Manager")
- **Dynamic** - approver selected by the requester during request creation
- **Static** - approver selected by app administrator under approval path settings

You can assign approval paths for specific time-off types under Administration ➙ Time-Off ➙ Time-Off Types ➙ Edit



You can assign approval path timesheets under Administration → Timesheets → Settings



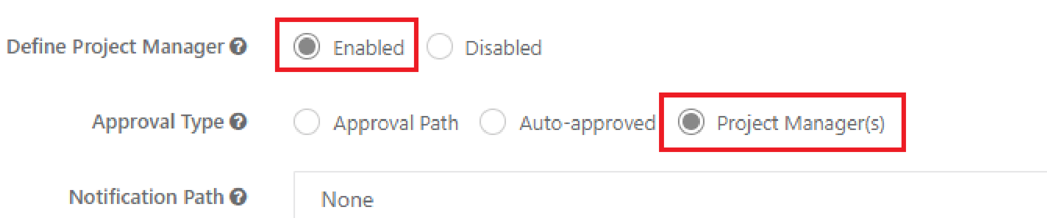
If you don't require to approve time-off or timesheets you can set up **automatic approval** (the approval process is disabled).
You can disable approval for specific time-off requests by setting up the "Approval Type" to the value "Auto-approved" under Administration → Time-Off→ Time-Off Types.
You can disable approval for timesheets by setting up the "Approval Type" to the value "Auto-approved" under Administration → Timesheets → Settings

The timesheet module supports one additional approval mode. Instead of the approval path defined by the app administrator, you can set "Approval Type" to the value "Project Manager(s"), then the approval path is generated dynamically based on projects included by the user on the timesheet form.

Three steps are required to complete this configuration variant:

1. Setup "Define Project Manager" under Administration → Timesheets → Settings to the value "Enabled"
2. Setup "Approval Type" under Administration → Timesheets → Settings to the value "Project Manager(s")
3. Edit project under Administration → Timesheets → Project and define Project Manager.

and Project Manager-defined by app administrator under Administration→ Timesheets→ Projects.



The concept of approval workflow in Work Time Pro

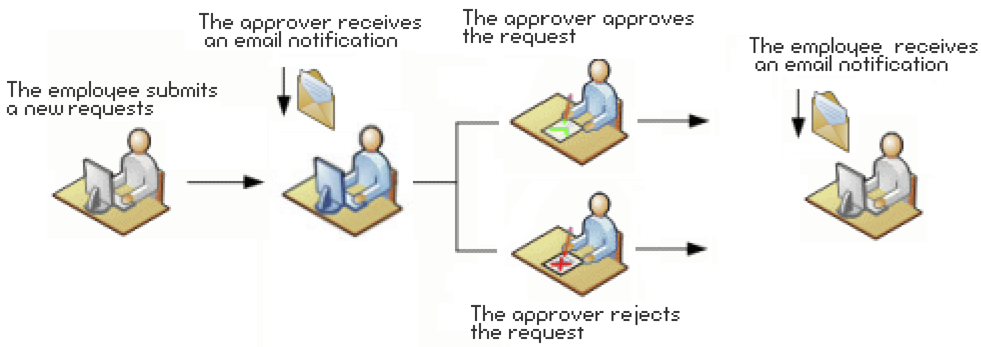
Approval workflows route timesheet or time-off requests to one or more approvers. The request can be approved or rejected by the approver.

Timesheet workflow has the following states: Draft → Pending Approval → Approved or Rejected.

Time-off workflow has the following states: Pending Approval → Approved or Rejected (with an optional "Canceled" state).

Approvals are processed one by one, for example, 2nd approver can approve or reject when 1st approver approves the request.

Approvers and requesters receive email notifications throughout the approval process.
The approver(s) receives an email notification when a request is submitted.
The requester receives an email notification when a request is approved or rejected.

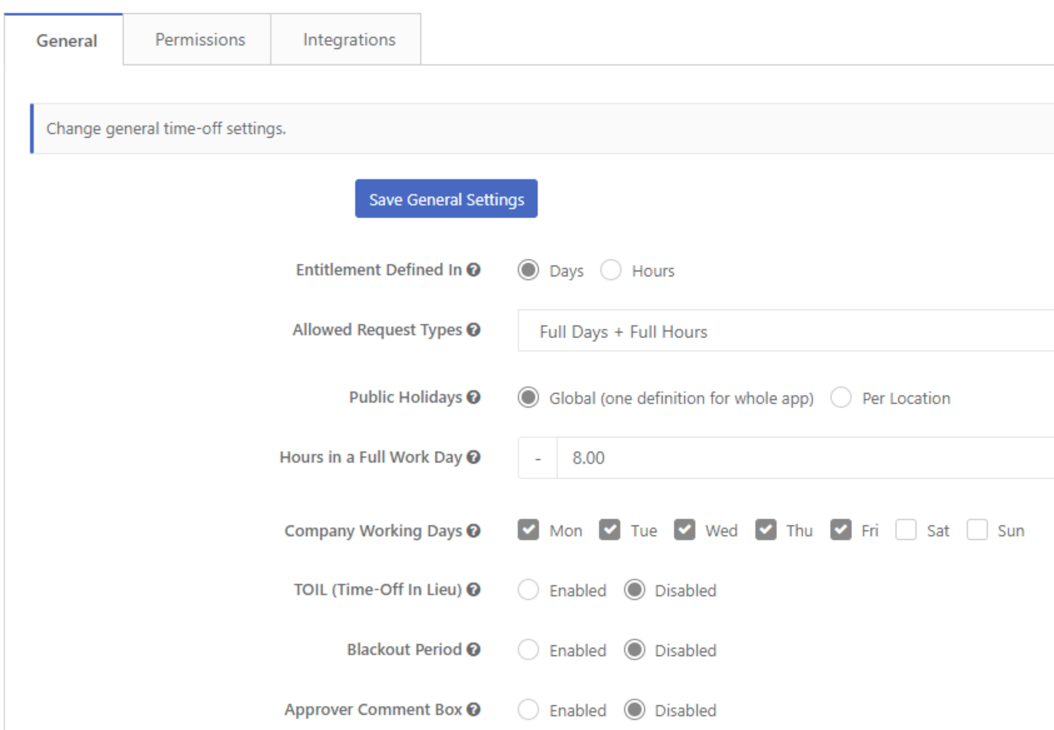


Time-off module configuration

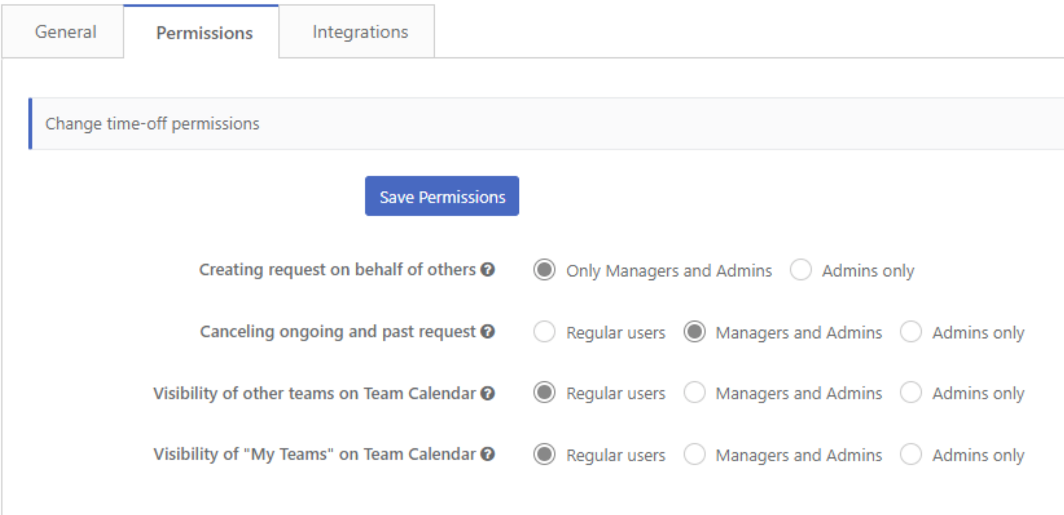
Step 1) Configure general time-off settings

You can configure general system settings under Administration → Time-Off → Settings

- Tab **"General"** - allows setting up global time-off settings(e.g. entitlement units, allowed request types)

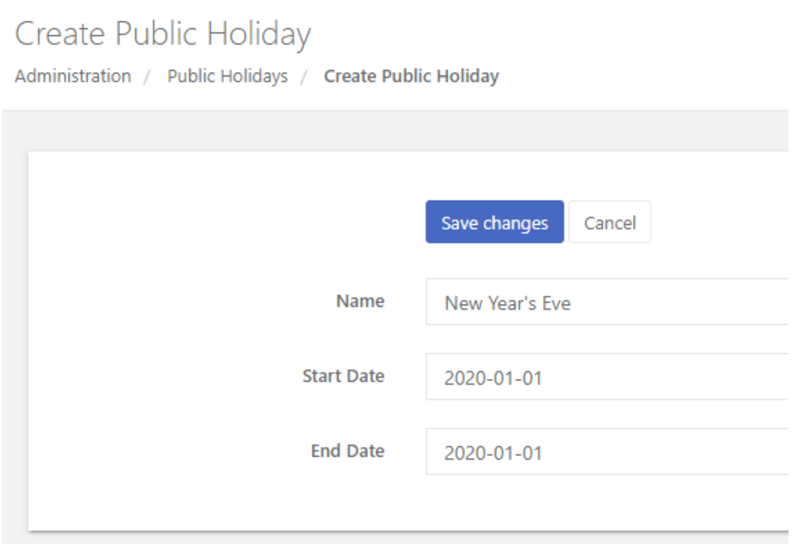


- Tab **"Permissions"** - allows setting permissions related to time-off requests like the visibility of “Team Calendar”

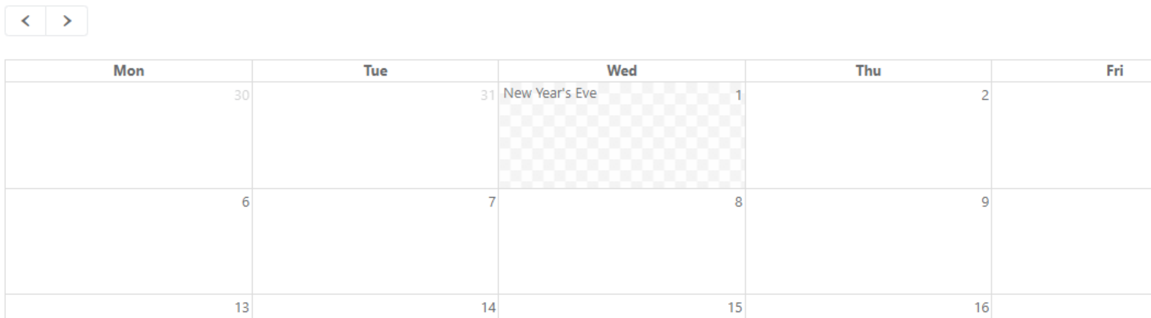


Step 2) Create public holidays

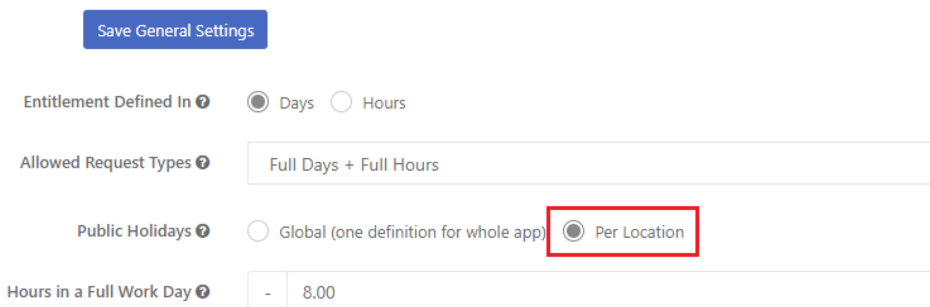
You can create public holidays under Administration → Time-Off → Public Holidays.



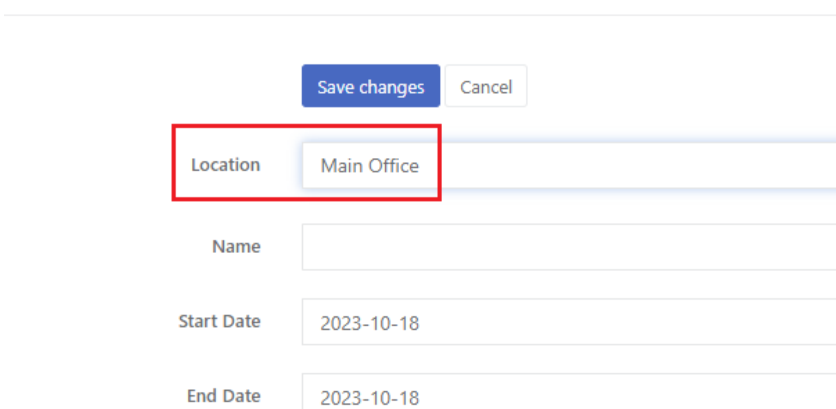
Public Holidays (also known as National Holidays) are days designated as non-working days in a specific country. If the time-off request includes public holidays, the public holidays are not deducted from your balance. For example, if the user submits a leave request for 1st and 2nd January and 1st January is defined as a “Public Holiday”, then the number of deducted working days is 1 instead of 2.
Public Holidays are visible on the team calendar and on the timesheet form (if you use the time-off module)



By default, there is one, common public holiday bank, but for organizations spanning multiple regions, where the public holiday will vary from country to country there is an ability to set up public holidays per location. To achieve it, please open view Administration→ Time-Off → Settings, switch the option “Public Holidays” to the value “Per Location” and confirm by clicking on the button “Save General Settings”.



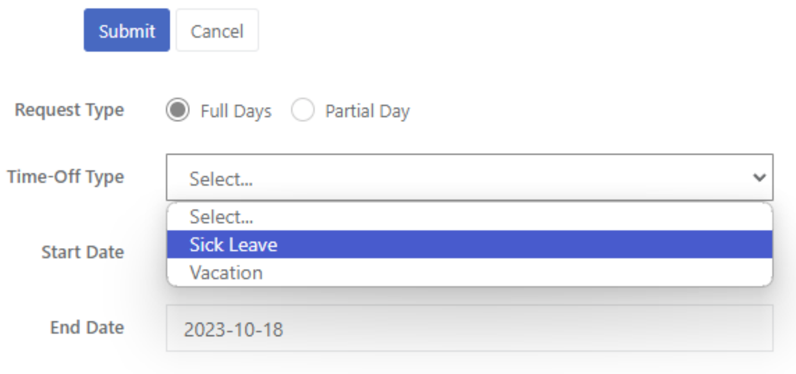
Then you will have the ability to define public holidays per location under Administration → Time-Off → Public Holidays.



Step 3) Create time-off types

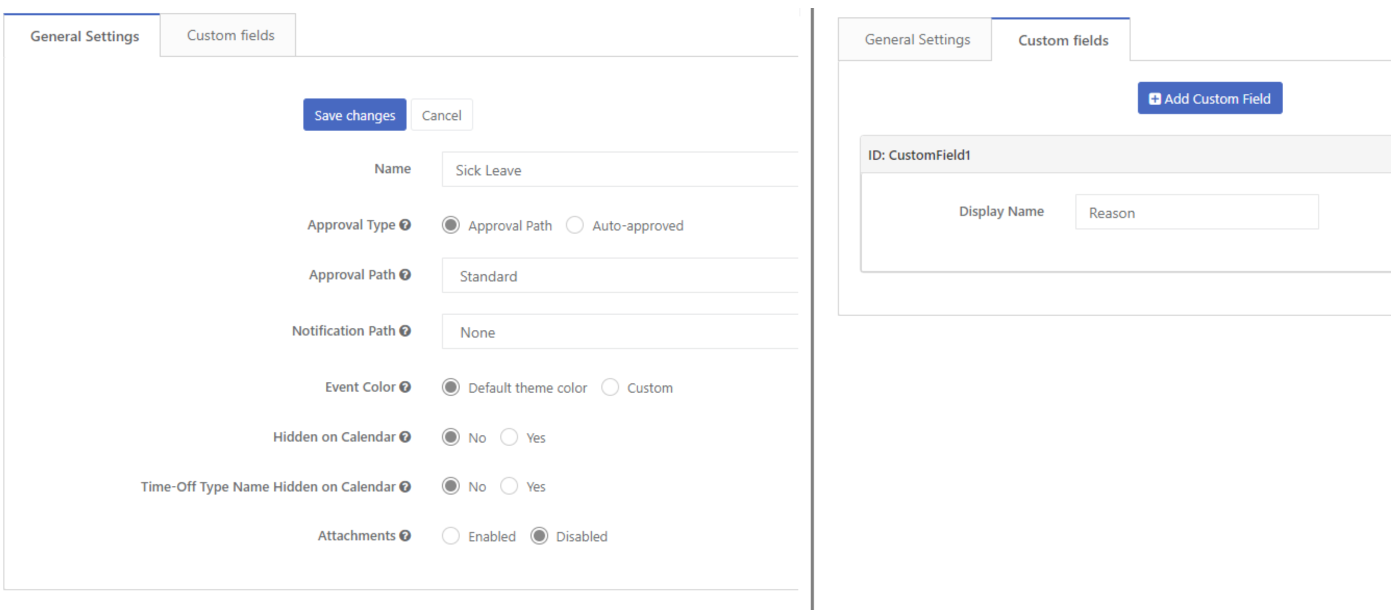
You can create public holidays under Administration → Time-Off → Time-Off Types.

Time off type is a category of time off (e.g. Vacation, Sick Leave, Training, etc) which are visible on the request creation form.



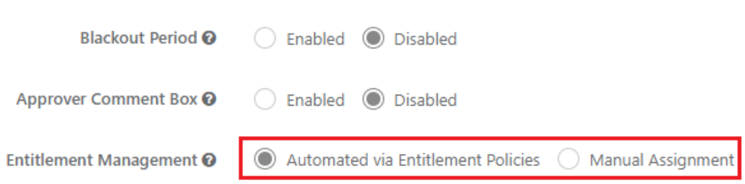
Each time-off type has a separate entitlement assigned under Administration→ Time-Off→ Entitlements and on the request creation form app displays only time-off types allowed for specific users. That allows the implementation of specific configuration variants, for example, the “Maternity leave” type may only be available to selected users instead of all users.

You can create as many types as your organization requires, each type can have different settings like approval path, color on the calendar, or specific custom fields.



Step 4) Create entitlement policies and assign entitlements

There are two variants of managing entitlements, configurable under Administration → Time-Off → Settings → option “Entitlement Management”.



Variant 1) Automated via Entitlement Policies (default option) - entitlement rules are configurable under Administration → Time-Off → Entitlement Policies. In this configuration variant there is one, continuous entitlement entry per user and time-off type (e.g. Vacation for John Smith), and once created, automatically resets and accrues every year depending on the policy without the need of admin work.

Variant 2) Manual Assignment - with this option, there's no requirement to establish entitlement policies. Instead, the app administrator takes charge of manually creating or duplicating entitlements for each calendar year (option "Clone" allows cloning entitlements into the next year). This variant features a distinct entitlement for each year (e.g., Vacation 2023, Vacation 2024), providing visibility into the available balance for each calendar year. The deduction from the proper entitlement is based on the leave request date (e.g., a request submitted for January 2024 deducts from the 2024 entitlement).

Variant 1) Automated via Entitlement Policies

You can create entitlement policies under Administration ➔ Time-Off ➔ Entitlement Policies.

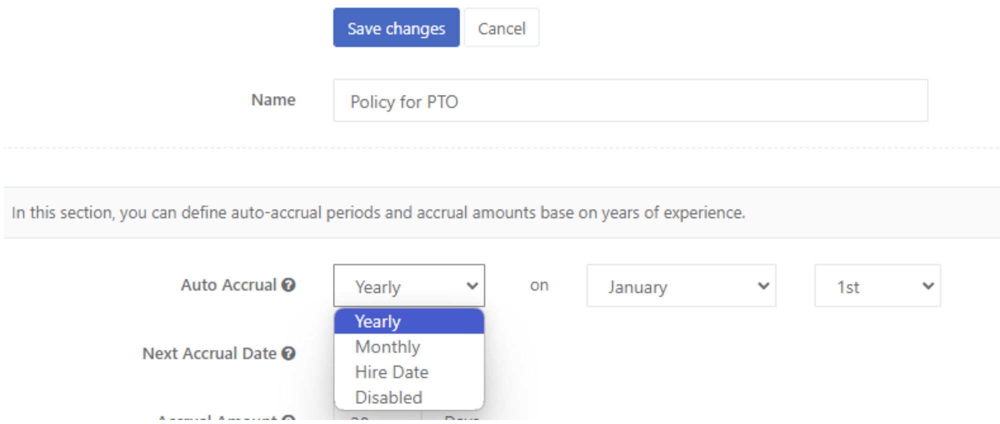
After populating the system with the time-off types, such as Vacation or Sick leave, you'll be required to establish entitlement policies that determine the various accrual options. Subsequently, you can use these entitlement policies to assign entitlements to specific users under Administration ➔ Time-Off ➔ Entitlements (which will be explained later in this chapter).

Auto-accrual is a feature that automatically calculates and updates the accrued leave entitlements based on predefined rules and criteria, which brings a lot of benefits:

- Efficiency and Accuracy: Auto-accrual eliminates the need for manual calculations, reducing the chances of errors in leave balance calculations.
- Consistency: Auto-accrual ensures that leave entitlements are consistently and fairly calculated for all users, following the same rules and policies.
- Reduced Administrative Burden: HR and administrative staff benefit from reduced manual data entry and calculations. This frees them up to focus on more strategic tasks and reduces the risk of human error.

Setting "Auto-accrual" allows you to set up accrual mode or disable auto-accrual, there are 4 options available:

- **Yearly** - entitlement is automatically accrued once a year (e.g. 1st January)
- **Monthly** - entitlement is automatically accrued once a month (e.g. 1st day of each month)
- **Hire Date** - entitlement is automatically accrued once a year at the employee hire date (defined under Administration➔ General ➔ Users ➔ Edit ➔ field "Hire Date")
- **Disabled** - auto-accrual disabled, balance can be manually controlled by app admin

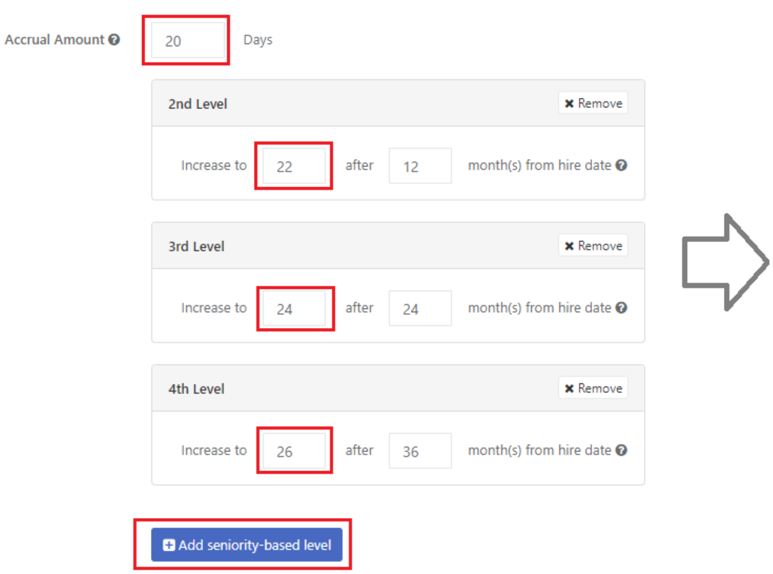


You can create different entitlement policies and assign them to different entitlements, for example:-

- entitlement policy for PTO with auto-accrual once a year
- entitlement policy for Sick Leave with auto-accrual disabled (that allows managing user entitlements in a manual way)

The default accrual amount can be defined in the field "Accrual Amount". By clicking on the button "Add seniority-based level" you can optionally set up different accrual amounts to a different group of users based on their work experience (calculated at the moment of accrual from the field "Hire Date" in the user profile: Administration→ General→ Users).

The below illustration presents the sample entitlement policy.

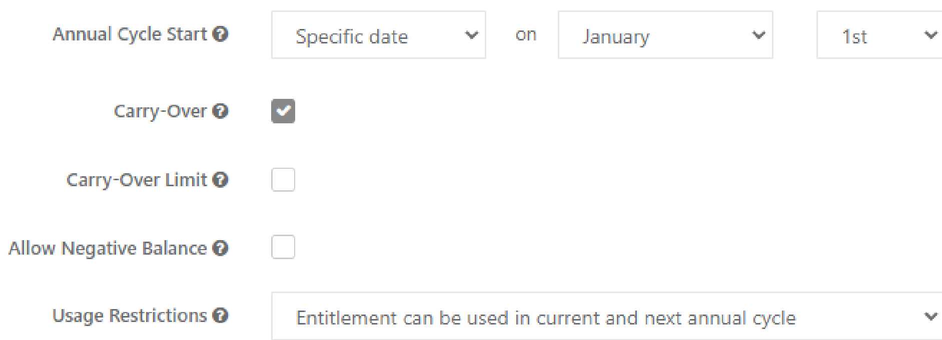


Entitlement policy

Level	Seniority	Entitlement
1st	Less than 12 months (1 year)	20
2nd	Between 12 and 24 (1-2 years)	22
3rd	Between 24 and 36 (2-3 years)	24
4th	Above 36 (3 years)	26

In the field "Annual Cycle Start", you can select a start date for the annual (12 months) cycle: calendar year (starting 1st January), custom fiscal year, or based on the hire date of individual employees. When the new cycle starts, fields "Accrued This Year" "Used This Year" and optionally "TOIL" are reset (zeroed), field "Carried

Over From Previous Year" is filled out automatically based on carry-over rules. If an accrual and reset date occur on the same day, the reset occurs first, and then the accrual.



You can also set whether the unused leave is carried over into the next annual cycle by selecting the checkbox “Carry-Over”, with an optional carry-over limit (checkbox “Carry-over limit”).
Option “Allow Negative Balance” allows users to submit more requests than allowed in the entitlement.

Option “Usage Restrictions” allows to select whether the user can use entitlement in the next annual cycle.

The below table presents how auto-accrual and reset work in sample configuration:

- Both auto-accrual and annual cycle start setup on 1st January
- “Accrual Amount” set to 24
- Carry-over option enabled

Before 1st January		After 1st January	
Accrued This Year	24	Accrued This Year	24
Carried Over	5	Carried Over	9
Used This Year	20	Used This Year	0
Available	9	**Available**	33

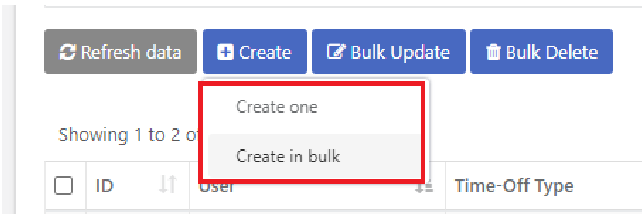
In the above example, the unused amount from the previous year (9) goes into the “Carried-Over” field, which increases the balance available in the next year to 33 (24+9). The field “Used This Year” is zeroed (set to value 0) and starts increasing when the user submits a new request for a given year.

Assign entitlements to users

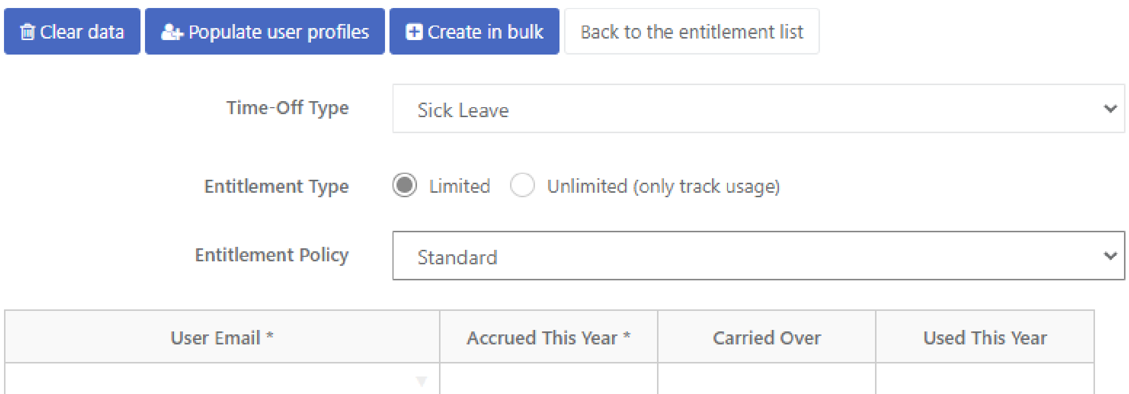
When time-off type and entitlements policies are created, you can assign entitlement to users under Administration → Time-Off → Entitlements.

You can create entitlement by using two modes:

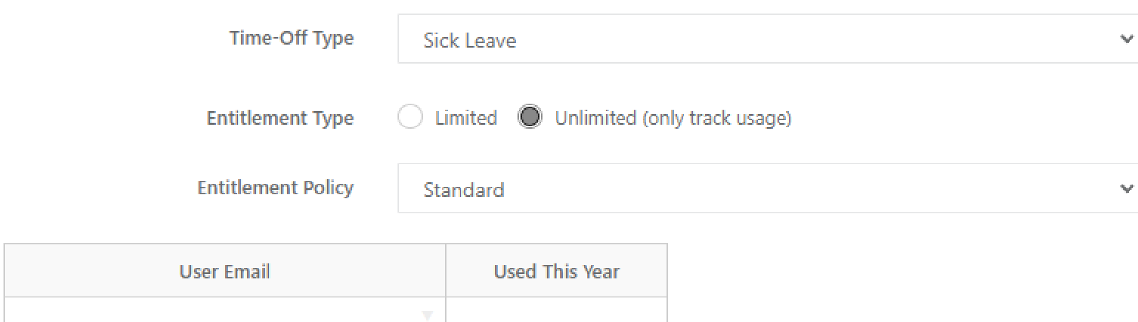
- “Create one” - creating records in standard form
- “Create in bulk” - creating records in an MS Excel-like spreadsheet, which supports copy-paste from MS Excel by using Ctlr+C and Ctlr+V



To create an entitlement entry, you need to fill out the following fields: Time-Off Type, Entitlement Type, Entitlement Policy, User, Accrued This Year, Carried Over, and Used This Year.

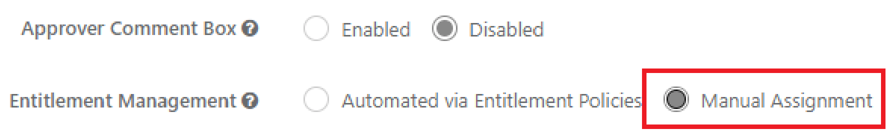


Option “Entitlement Type” allows creating “unlimited” entitlements (without specific balance), which can be used for selected time-off types like Sick Leave. Unlimited entitlements don’t have fields “Accrued This Year” and “Used This Year” (only field “Used This Year”).

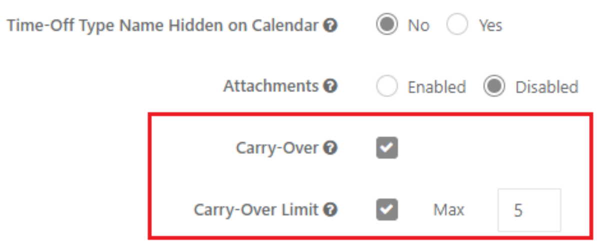


Variant 2) Manual Assignment

To switch to this variant please open view Administration → Time-Off → Settings, set the option “Entitlement Management” to the value “Manual Assignment” and confirm changes by clicking on the button “Save General Settings”.



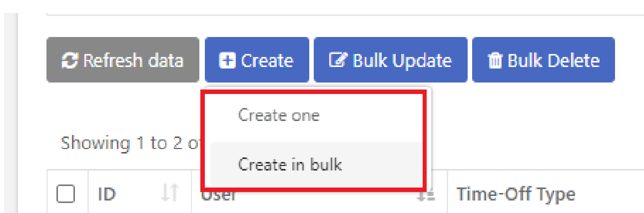
The next step is to review carry-over options under time-off type settings (Administration → Time-Off → Time-Off Types → edit). Checkbox “Carry-over” enables the transfer of unused balance from the previous year into the current year. Optionally you can enable a carry-over limit, for example, carry-over max. 5 days.



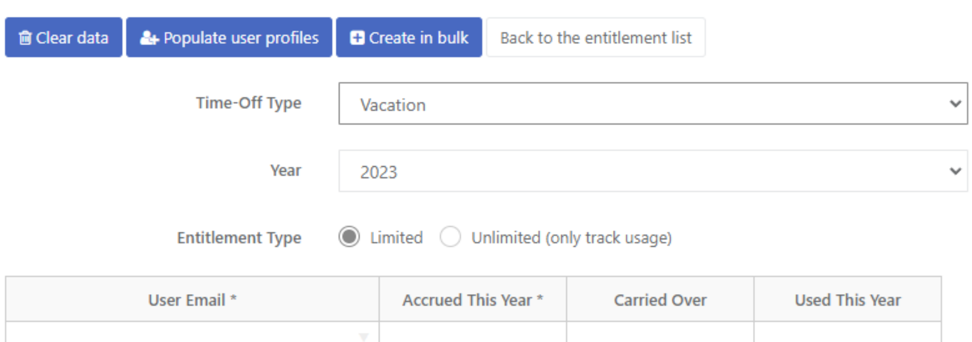
Creating entitlements (initial setup)

You can create entitlement by using two modes:

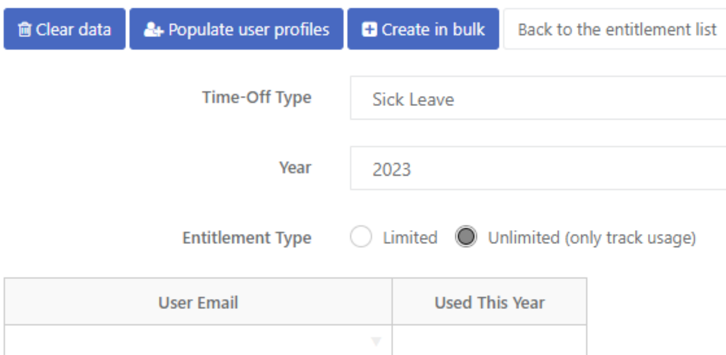
- “Create one” - creating records in standard form
- “Create in bulk” - creating records in an MS Excel-like spreadsheet, which supports copy-paste from MS Excel by using Ctlr+C and Ctlr+V



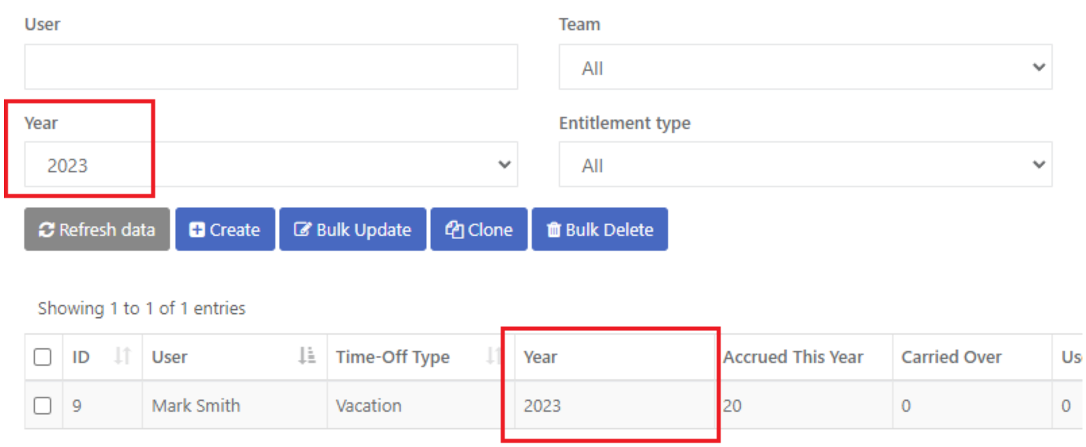
To create an entitlement entry, you must fill out the following fields: Time-Off Type, Entitlement Type, Year, User, Accrued This Year, Carried Over, and Used This Year.



Option “Entitlement Type” allows creating “unlimited” entitlements (without specific balance), which can be used for selected time-off types like Sick Leave. Unlimited entitlements don’t have fields “Accrued This Year” and “Used This Year” (only field “Used This Year”).



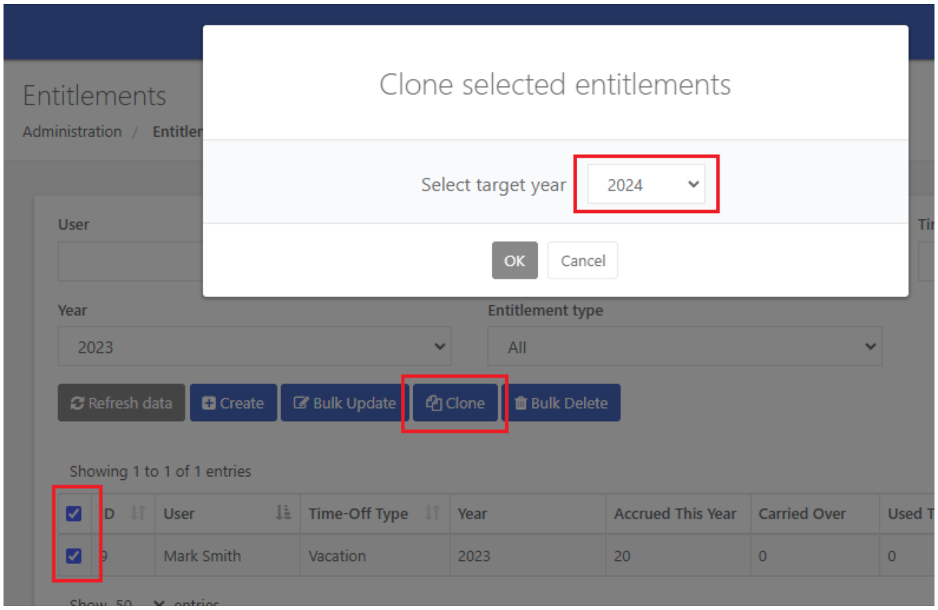
In comparison to variant 1 (Automated via Entitlement Policies) in this configuration variant, there is an additional filter “Year” on the entitlement list and an additional column “Year” in the entitlement entry (each entitlement is assigned for the specific calendar year).



Cloning entitlements

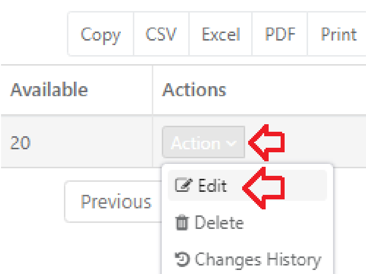
After creating the first entitlements, the fastest way of creating the next entitlements for the next calendar year is by using the button “Clone” under Administration → Time-Off → Entitlements.

To duplicate entitlements, begin by selecting the desired entitlements using the checkboxes (or one checkbox “select all” in the header). Afterward, click the "Clone" button. A popup window will appear, prompting you to specify the target year. Click "OK" to proceed.

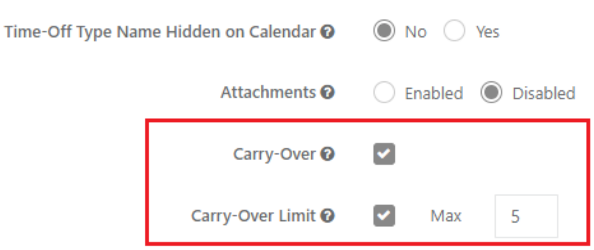


The "Clone" function generates an entitlement for the upcoming year based on the "Accrued This Year" value from the chosen entitlement. For instance, if user John Smith has accrued 20 days for 2023 and you clone this entry into 2024, John Smith will also receive 20 days for 2024.

The "Clone" function operates in bulk mode, allowing you to create entitlements simultaneously for multiple users, such as 40 users at once. In cases where specific users have varied entitlements for the next year due to factors like seniority levels, you have the flexibility to manually edit entitlements. Click the button “Actions” in the data table, select the option “Edit” and simply adjust the "Accrued This Year" field to reflect the appropriate entitlement for each user.



The "Clone" function performs balance carry-over according to time-off type settings (Administration → Time-Off → Time-Off Types → edit



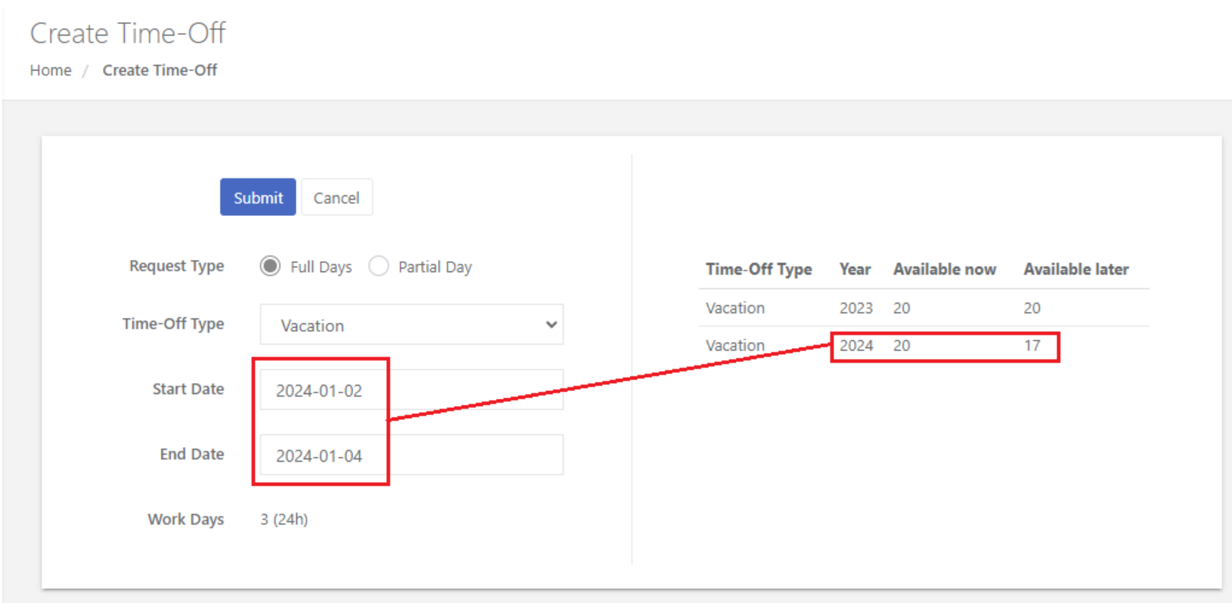
If the "Carry-over" option is turned off, any remaining balance (indicated in the "Available" field) will be lost.

When the "Carry-over" option is enabled, two scenarios arise:

1) If you duplicate the entitlement for the next year before its commencement, for example, cloning the entitlement for 2024 in December 2023, the unused balance from 2023 will automatically carry over after January 1, 2024.
2) If you duplicate the entitlement after its commencement, let's say cloning the entitlement for 2024 in January 2024, then the unused balance from 2023 will be carried over during the process of cloning the balance.

Rules for submitting leave requests and deducting balances

When users initiate a leave request, they have visibility into the available balance for both the current and upcoming years, provided such entitlement exists. For instance, if the request is made in December 2023, the user will see entitlement entries for both 2023 and 2024. The deduction from the appropriate entitlement aligns with the leave request date; for instance, a request submitted for January 2024 deducts from the 2024 entitlement.

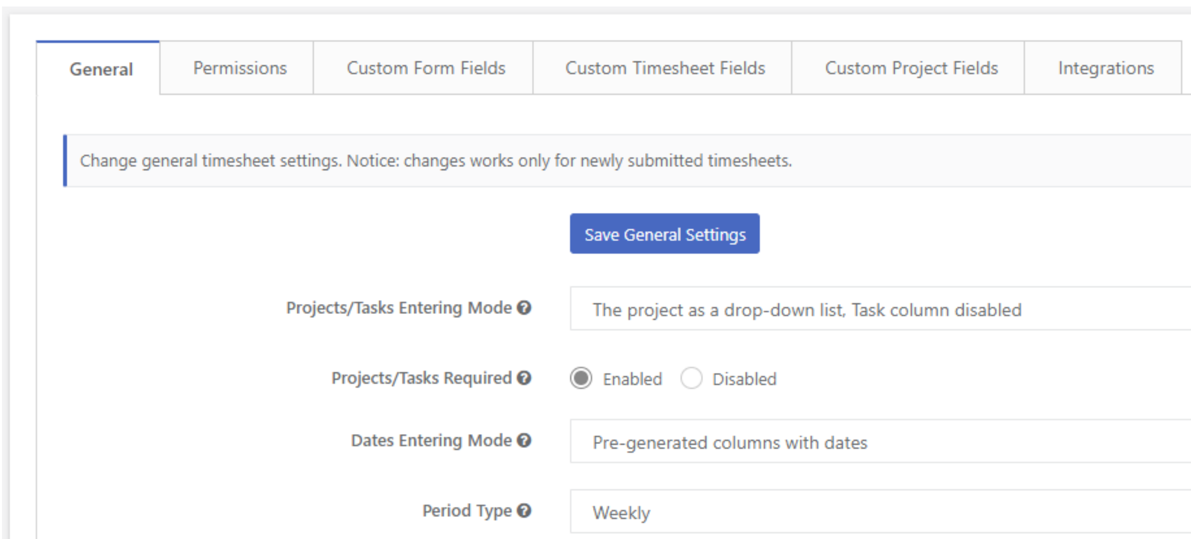


Timesheet module configuration

Step 1) Configure timesheet settings

You can create timesheet settings under Administration → Timesheets → Settings.

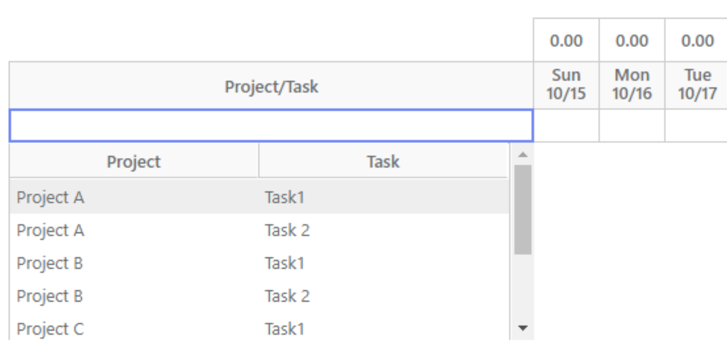
- Tab **“General”** - allows you to configure global settings related to timesheets (e.g. projects/task-entering mode, period type, custom fields etc)

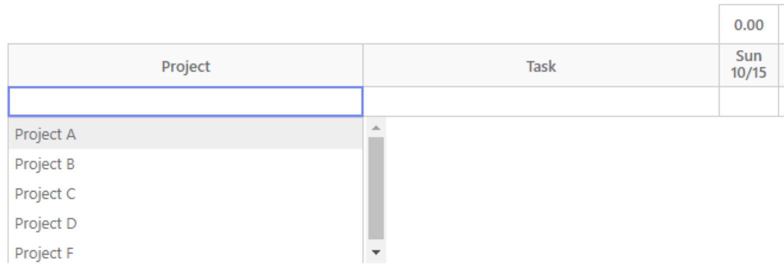
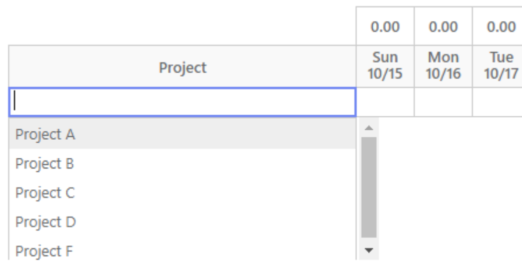
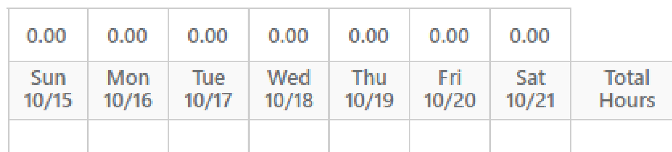


Three key timesheet settings are responsible for shaping the timesheet form:

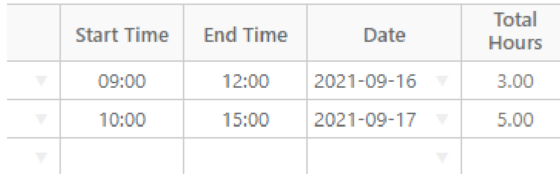
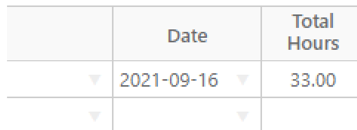
- “Project/Task Entering Mode” - allows you to define a way of entering tasks and projects.
- “Dates Entering Mode” - ” allows you to define a way of entering hours on the timesheet.
- “Period Type” - allows you to define timesheet period (Weekly,Bi-Weekly,Semi-Monthly,Monthly)

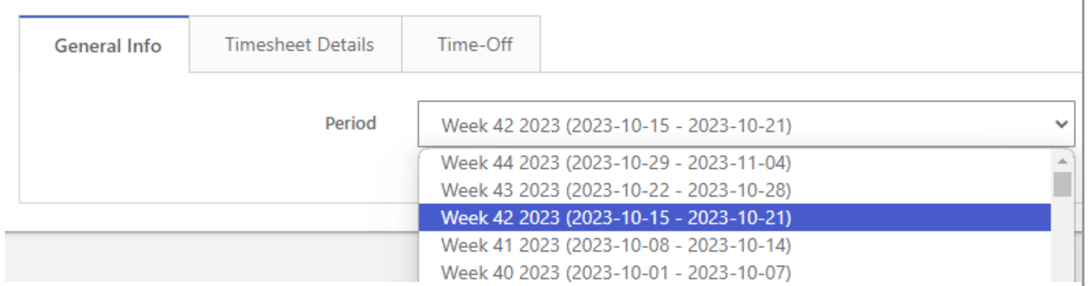
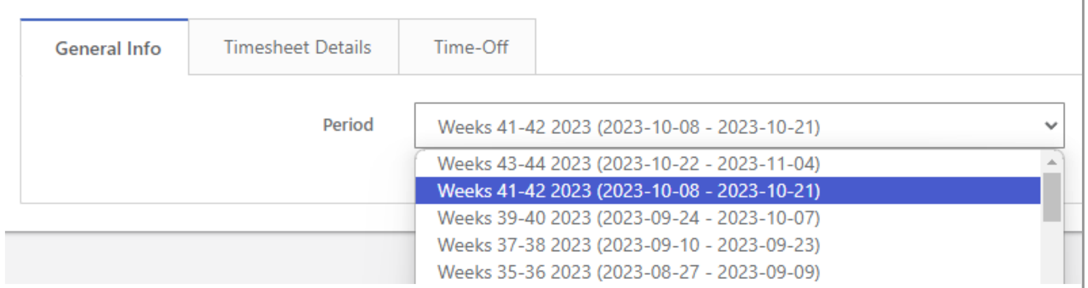
The below tables present how the above settings affect the timesheet visibility.

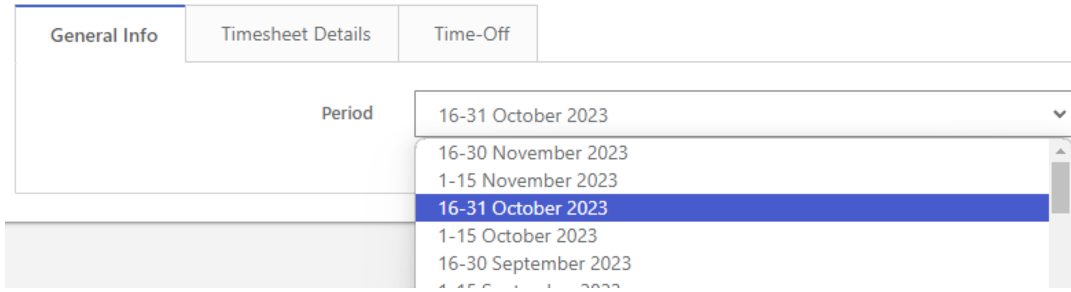
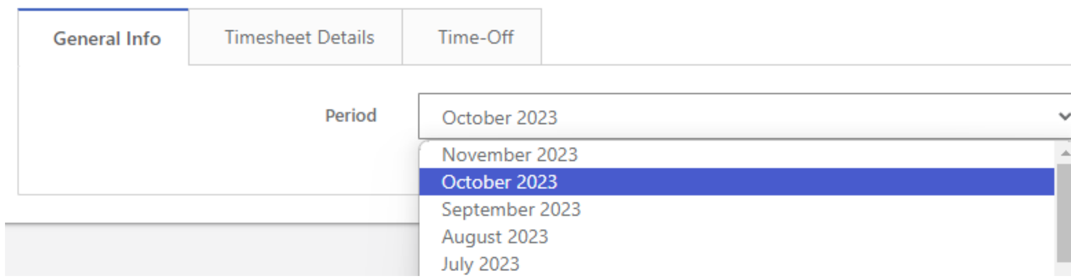
Setting “Project/Task Entering Mode”	**How the timesheet looks like**
Project/Task as drop-down list - both project and task list defined under Administration➔ Timesheets➔ Projects. The user selects a project and task from the table.	

<table>
<tr>
<td>Project as drop-down list, tasks as text box - project list defined under Administration➡ Timesheets➡ Projects, tasks created manually by the user on timesheet form (free text field).</td>
<td>
</td>
</tr>
<tr>
<td>Project as drop-down list, Task column disabled - project list defined under Administration➡ Timesheets➡ Projects, no field 'Task' on timesheet form</td>
<td>
</td>
</tr>
<tr>
<td>Project and Task columns disabled - no fields 'Project' and 'Task' on timesheet form. Usually, this configuration variant is used when custom timesheet fields are enabled (Instead of built-in project and task fields, you can also create custom timesheet fields, which will be explained in the next chapters)</td>
<td>
</td>
</tr>
</table>

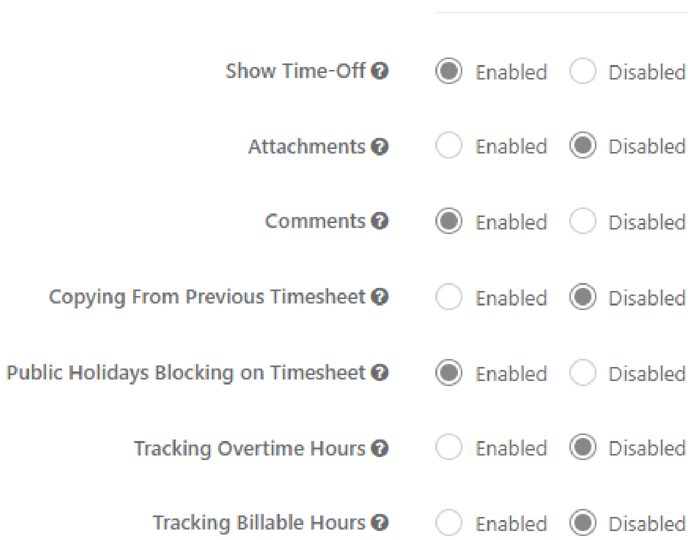
<table>
<tr>
<th>Setting “Dates Entering Mode”</th>
<th>How the timesheet looks like</th>
</tr>
<tr>
<td>Pre-generated columns with dates - all date columns for a given period are created automatically. The user enters no. of hours in date columns (e.g. Mon, Tue etc)</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>Start Time + End Time + Date column - only 3 columns are created for entering hours: Start Time (time picker), End Time (time picker) and Date (date picker). Total hours are calculated automatically based on start/end time difference.</td>
<td></td>
</tr>
<tr>
<td>Date column only - only one column is created for entering hours: Date (date picker), The user enters hours in the field “Total Hours”</td>
<td></td>
</tr>
</table>

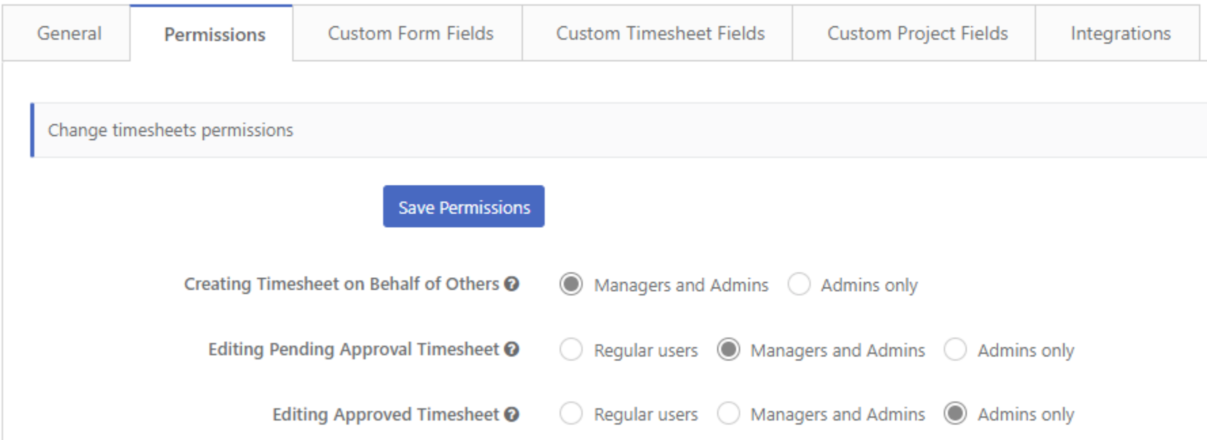
<table>
<tr>
<td>Setting “Period Type”</td>
<td>How the timesheet looks like</td>
</tr>
<tr>
<td>Weekly</td>
<td></td>
</tr>
<tr>
<td>Bi-Weekly</td>
<td></td>
</tr>
</table>

Semi-Monthly	
Monthly	

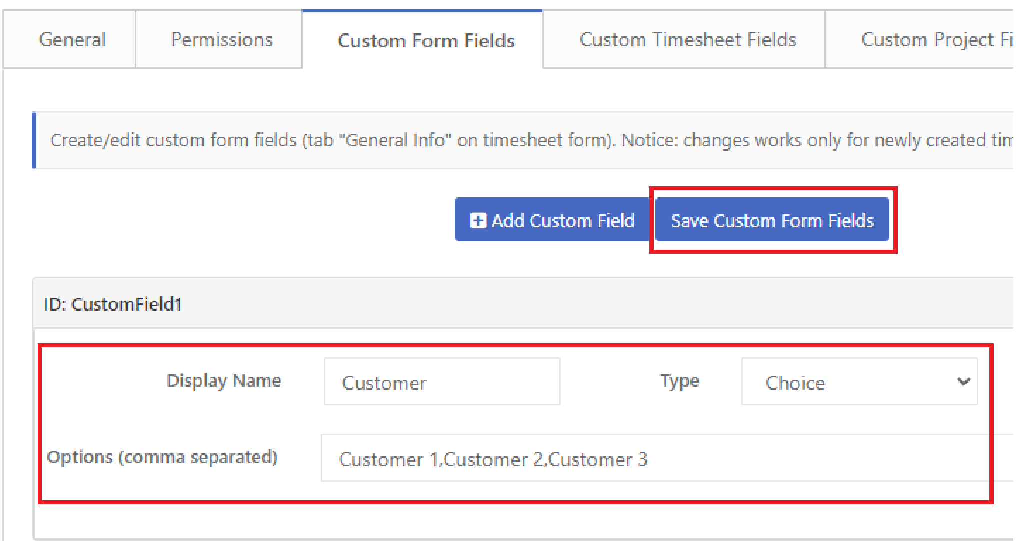
Additionally, there is a lot of different settings that allow enable or disable specific option on the timesheet like the ability to add attachments, ability to add comments and track overtime hours or billable hours.

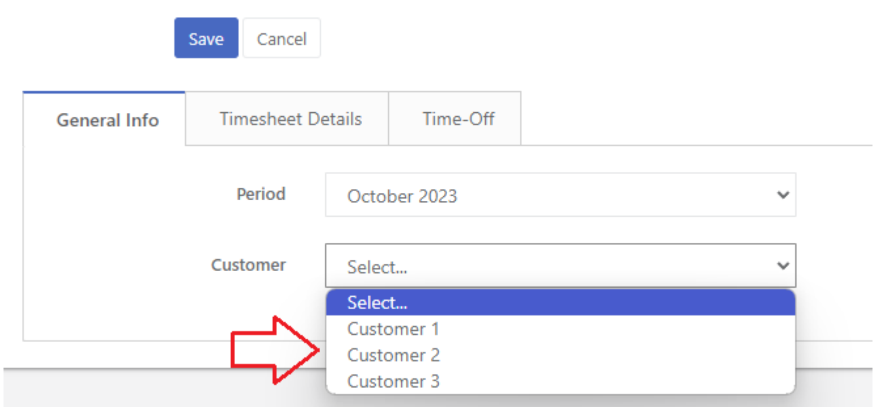


- Tab **“Permissions”** - allows you to set various permissions related to timesheets

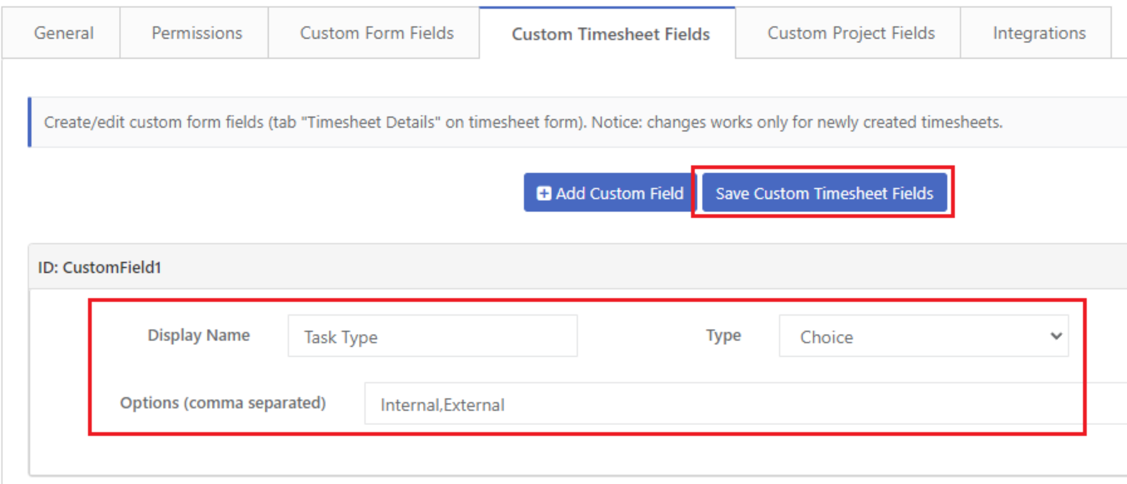


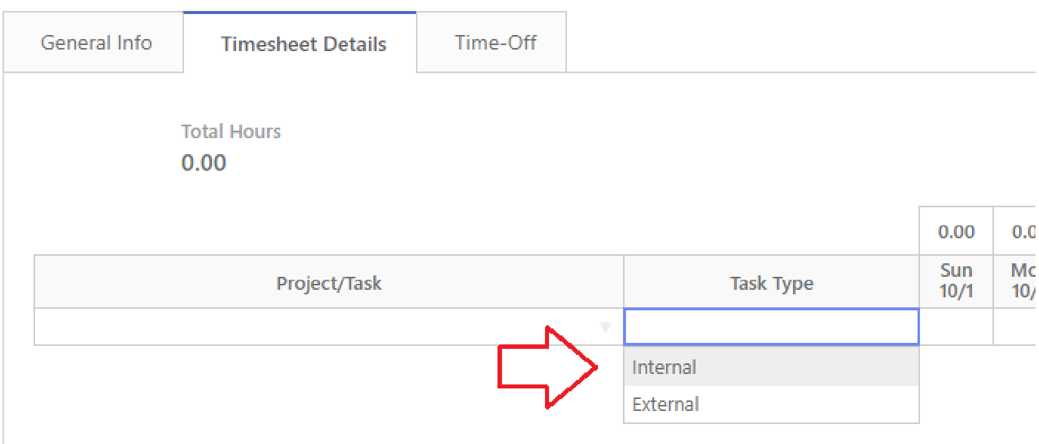
- Tab **"Custom Form Fields" -** allows you to create custom fields under tab "General" on the timesheet form. The below illustration explains how the custom form field works based on the sample custom field called "Customer".



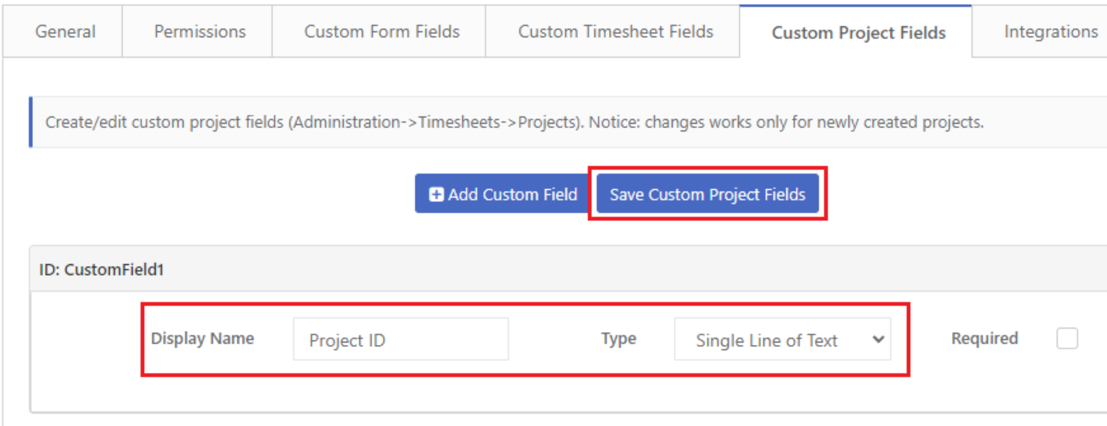


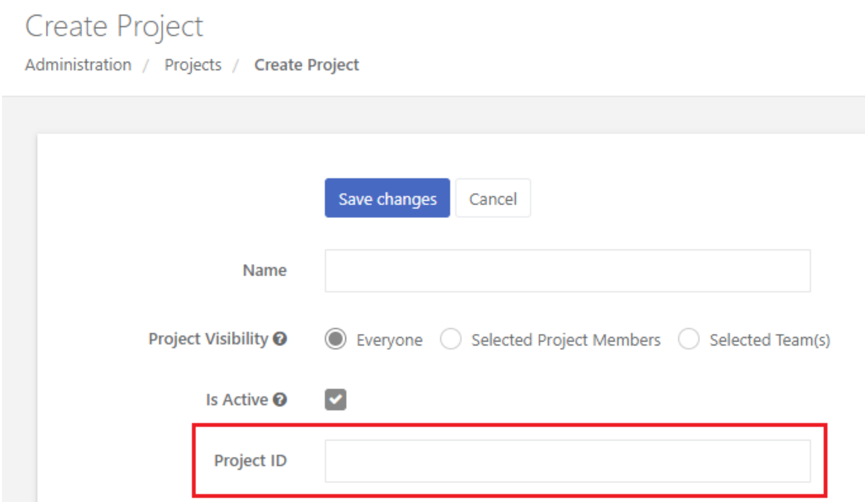
- Tab **"Custom Timesheet Fields" -** allows you to create custom fields under the tab "Timesheet Details" on the timesheet form. The below illustration explains how the custom form field works based on the sample custom field called "Task Type".





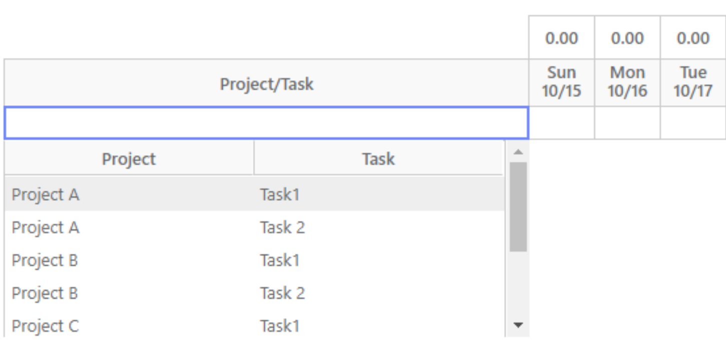
- Tab **"Custom Project Fields" -** allows you to create custom project fields. Custom projects fields are not visible to end-users on the timesheet, can be used to store additional metadata related to projects for internal purposes (e.g. custom Project ID), and are exported to MS Excel (Administration➜ Timesheets➜ Timesheet Report➜ button "Export Details to MS Excel")





Step 2) Create projects

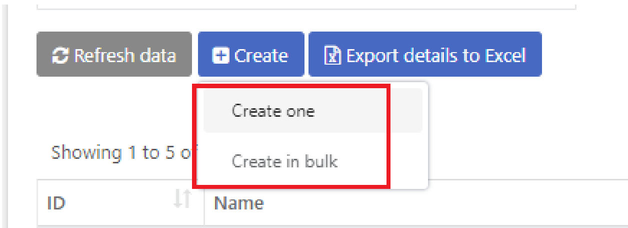
You can create timesheet settings under Administration → Timesheets → Project. Projects are how you organize tasks related to a specific goal. The project is selected by the user on the timesheet form.



You can create a project by using two modes:

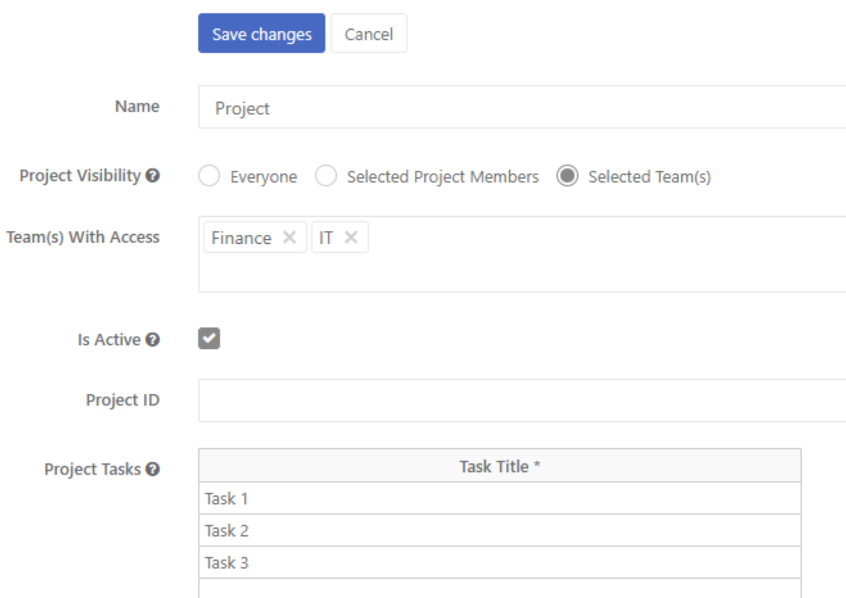
- “Create one” - creating records in standard form

- "Create in bulk" - creating records in an MS Excel-like spreadsheet, which supports copy-paste from MS Excel by using Ctlr+C and Ctlr+V. In this mode, you can enter only basic metadata (project name and optionally custom project fields).



The project consists of the following fields:

- **Name** - unique name of the project
- **Project Visibility** - allows restricts project visibility on timesheets only for selected users or teams (field **"Team(s) with Access"**
- **Is Active** - allows disabling project visibility on timesheet (e.g. in case of older projects)
- **Project Tasks** - allows to define a list of project tasks (this option is available only if setting "Project/Task Entering Mode" under Administration → Timesheets → Settings is set to the value "*Project/Task as drop-down list*")



If you have a huge list of tasks to enter, you can use Ctrl+C and Ctlr+V to copy and paste tasks from an MS Excel spreadsheet.

ADDITIONAL FEATURES

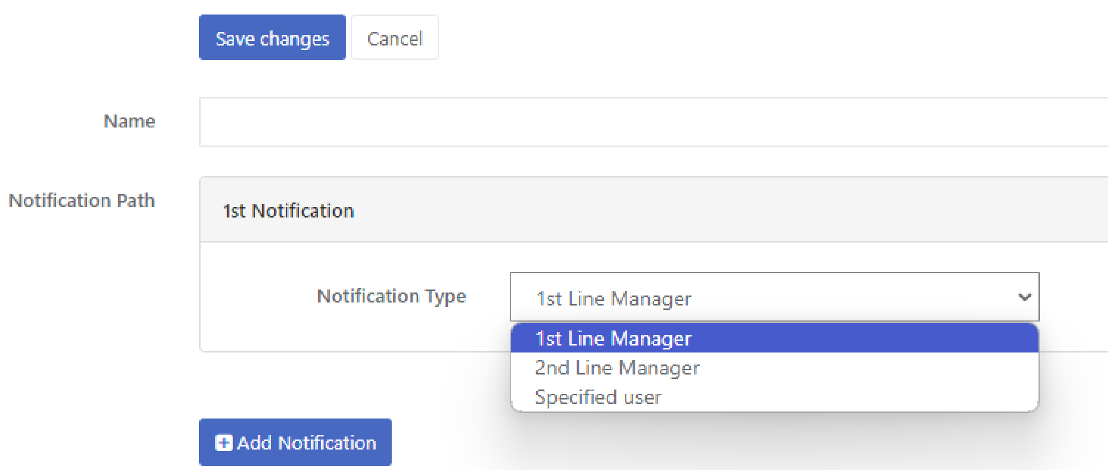
Notification Paths

You can configure Notification Paths under Administration → General → Notification Paths. Feature "Notificaiton Path" allows email notification of **extra** users who are **not** on the approval path, for example, notify the HR Payroll team that the timesheet is approved. Users who are defined on the approval path automatically receive email notifications so **there is no need to define a separate notification path for approvers**.

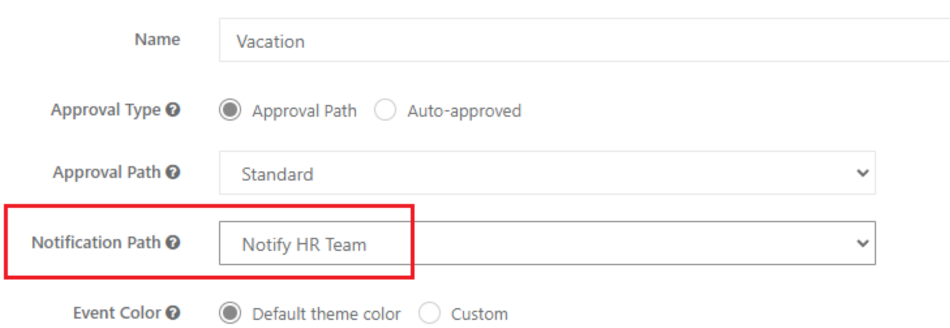
You add users by clicking on the button "Add Notification":

There are 3 supported types of extra email notification:

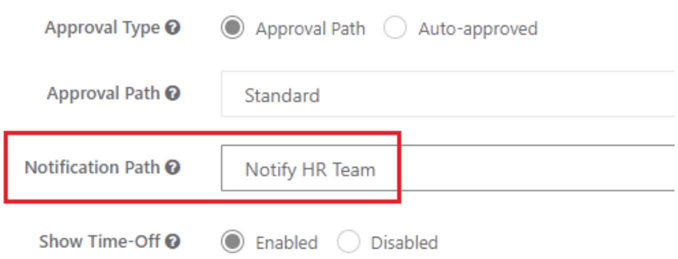
- **1st Line Manager** (approver taken automatically from user profile: Administration→ General→ Users→ field "1st Line Manager")
- **2nd Line Manager** (approver taken automatically from user profile: Administration→ General→ Users→ field "2nd Line Manager")
- **Specified user** - approver selected by app administrator under approval path settings



You can assign notification paths for specific time-off types under Administration → Time-Off → Time-Off Types

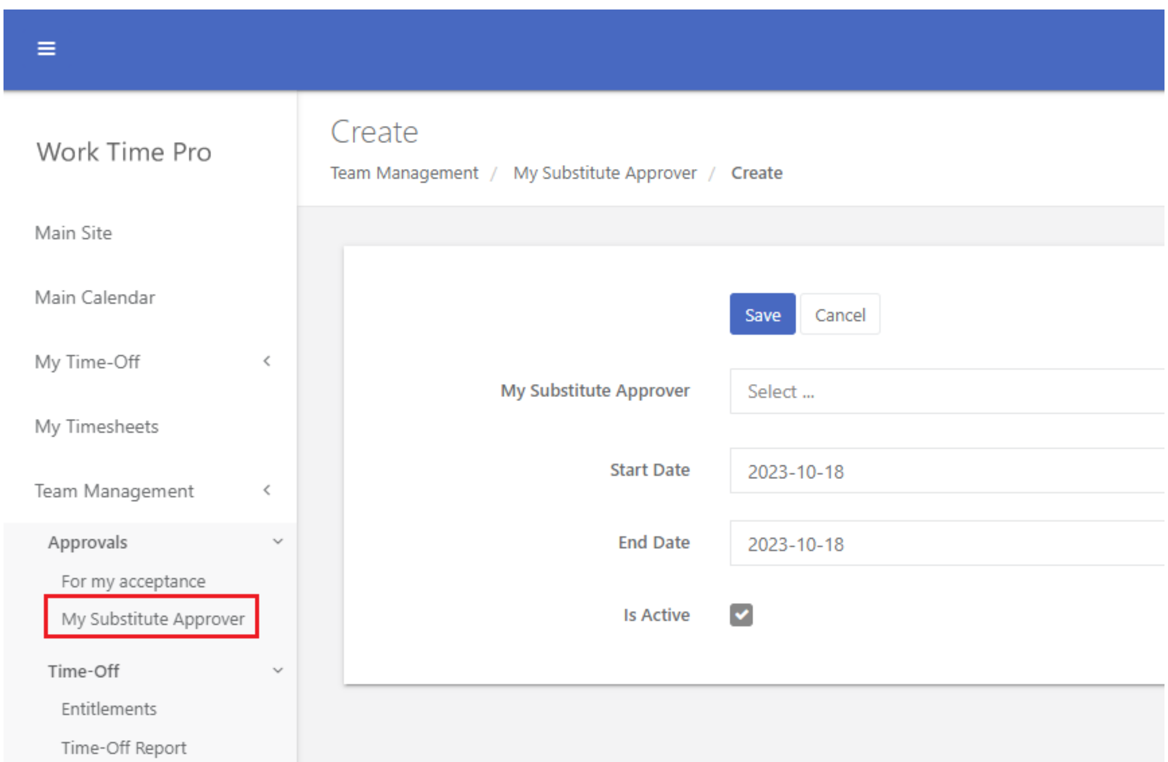


You can assign notification path timesheets under Administration → Timesheets → Settings



Substitute Approvers

Feature “Substitute Approver” can be used to redirect approvals to substitute approver in case of manager’s absence. Manage can create a substitute approver for yourself under Team Management→ My Substitute approver.



App administrator can define or change substitute approvers for everyone under Administration → General → Substitute Approvers.

Email templates for time-off requests

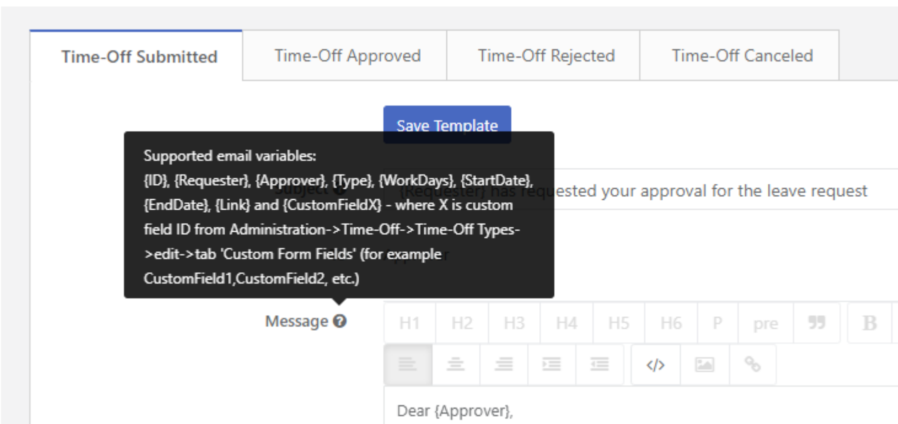
You can configure email templates for time-off requests under Administration → Time-Off → Email Templates.

Email templates allow you to customize the subject and body for email notifications (time off submitted/approved/rejected/canceled).

There are 4 email templates, which reflect different email notifications:

- Time-Off Submitted - email sent to the approver where there is a need to approve the request
- Time-Off Approved - email sent to the requester after final request approval
- Time-Off Rejected - email sent to the requester after request rejection
- Time-Off Canceled- email sent to the user manager(s) (defined in the User Profile in the app) when the request is canceled

You can hover the mouse over the help icon to see the list of supported email variables in the field “Subject” or “Message”.



Email templates for timesheet requests

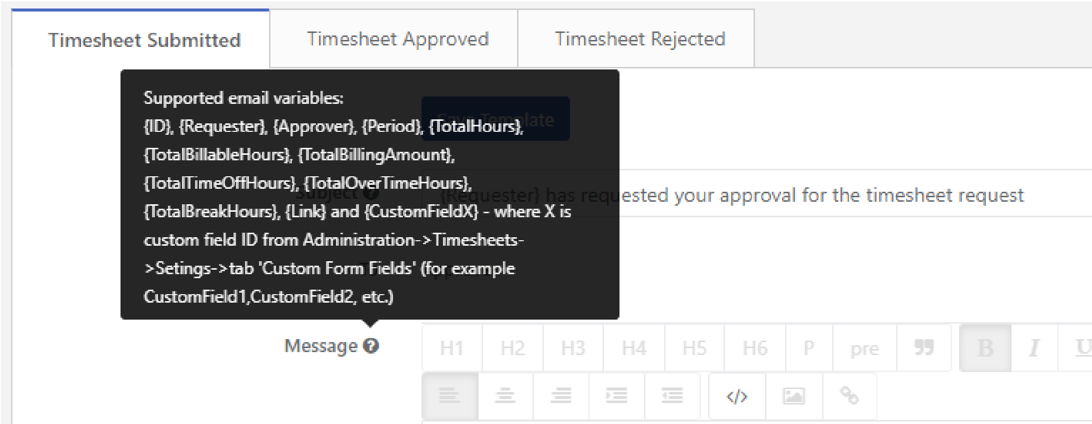
You can configure email templates for timesheets under Administration → Timesheets → Email Templates.

Email templates allow you to customize the subject and body for email notifications (timesheets submitted/approved/rejected).

There are 3 email templates, which reflect different email notifications:

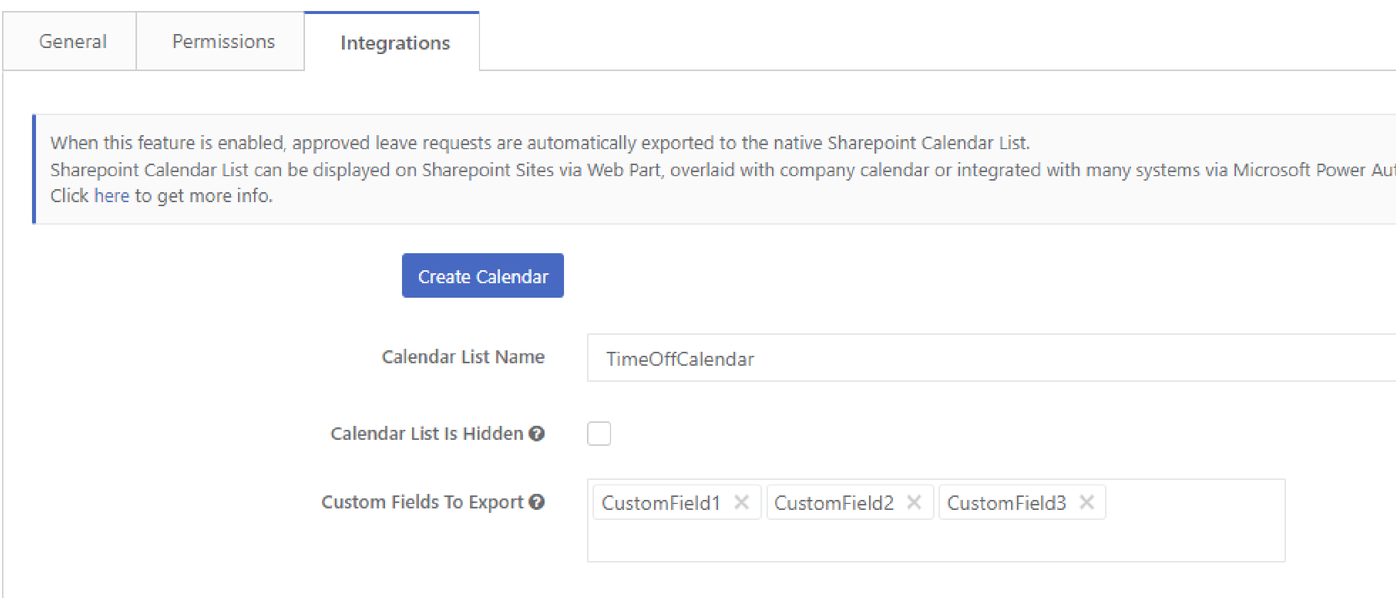
- Timesheet Submitted - email sent to the approver where there is a need to approve the timesheet
- Timesheet Approved - email sent to the requester after final request approval
- Timesheet Rejected - email sent to the requester after request rejection

You can hover the mouse over the help icon to see the list of supported email variables in the field “Subject” or “Message”.



Integration lists for time-off

When this feature is enabled, **approved** leave requests are automatically exported to the native Sharepoint Calendar List. Sharepoint Calendar List can be displayed on Sharepoint Sites via Web Part, overlaid with company calendar, or integrated with many systems via Microsoft Power Automate (i.e. Teams, O365 Outlook, Yammer, Slack, etc). Here is more info about this functionality with sample integrations: https://ivero.net/sharepoint-calendar-integrations.html

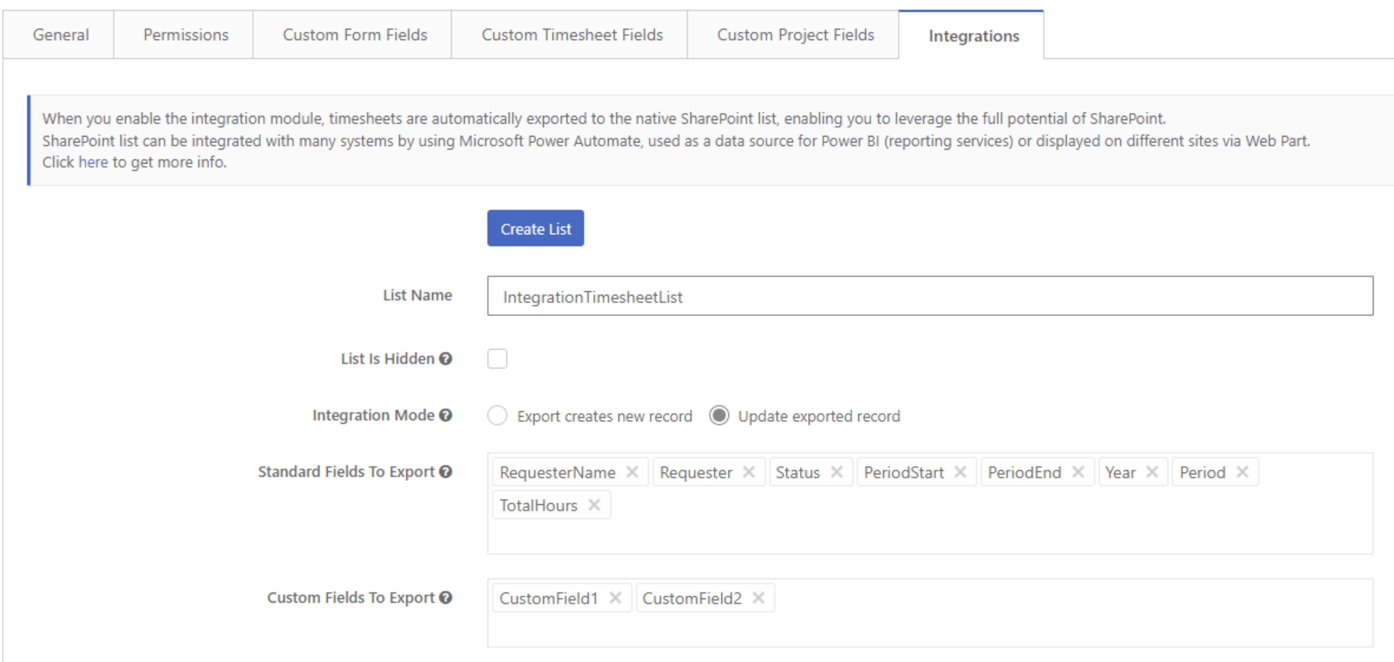


Integration lists for timesheets

When you enable the integration module, timesheets are automatically exported to the native SharePoint list, enabling you to leverage the full potential of SharePoint. SharePoint list can be integrated with many systems by using Microsoft Power Automate, used as a data source for Power BI (reporting services) or displayed on different sites via Web Part. Here is more info about this functionality with sample integrations: https://ivero.net/sharepoint-list-integrations.html

You can select which fields will be exported and select one of two integration modes:

- **Export creates new record** - timesheet is exported under the condition selected in the field Export Triggers, for example, if you select 'Approved' and 'Pending Approval' as triggers, 2 records will be exported
- **Update exported record -** timesheet is exported during creation and then the record is updated (1 timesheet = 1 record on integration list), which variant is useful for reporting purposes

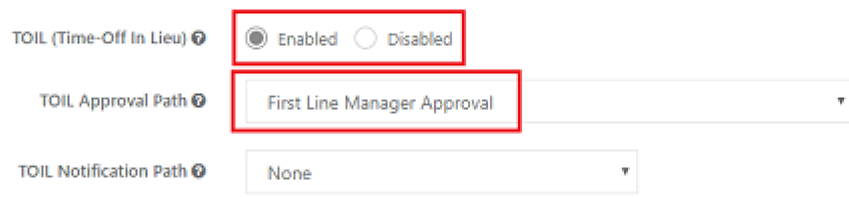


TOIL (time off in lieu)

This feature is designed for the time-off module only. TOIL (Time-Off in Lieu) or Compensatory Time is paid time off given to an employee instead of overtime pay. Below are steps to use this feature:

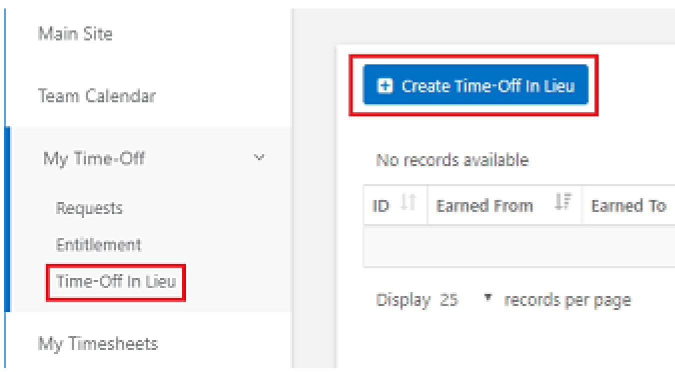
Step 1) As app administrator, go to the Administration → Time-Off → Settings, set up "TOIL" to "Enabled" and click the “Save” button to confirm changes.

TOIL requires selecting the approval path (which might be configured under Administration → General → Approval Paths)

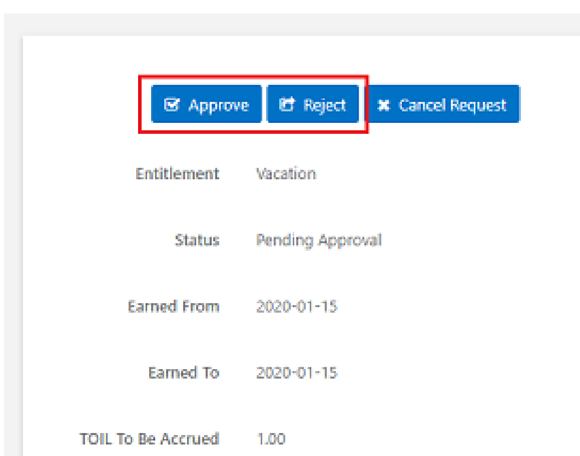


Optionally, the administrator can adjust email templates under Administration → Time-Off → TOIL Email Templates.

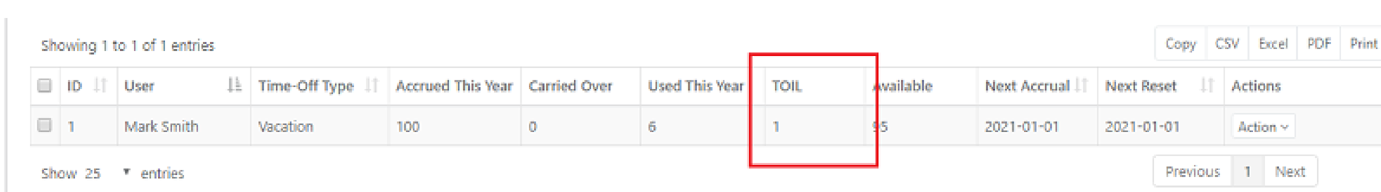
Step 2) A regular user can submit a TOIL request under My Time-Off → Time-Off In Lieu



Step 3) Approver(s) defined in the TOIL approval path receives an email notification, the request can be approved or rejected



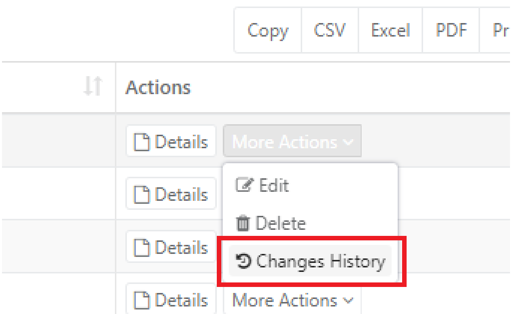
Step 4) After approval, the requested TOIL amount increases the available balance (field “Available”), the total TOIL amount is stored in a separate column.



ID	User	Time-Off Type	Accrued This Year	Carried Over	Used This Year	TOIL	Available	Next Accrual	Next Reset	Actions
1	Mark Smith	Vacation	100	0	6	1	95	2021-01-01	2021-01-01	Action

Tracking object changes (who created or modified the object)

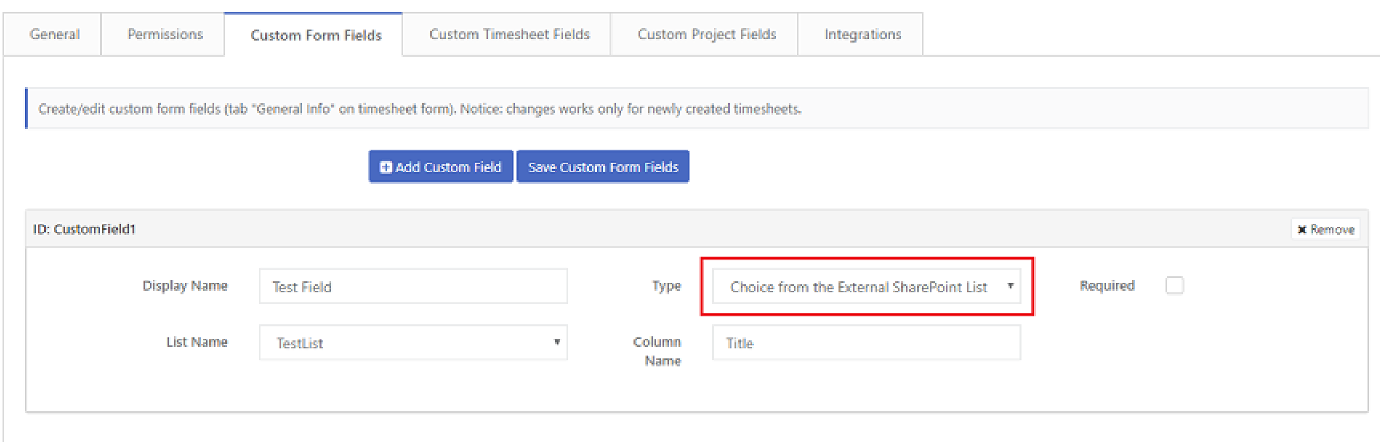
For each object created in the app (e.g. timesheet, time-off request, project, user etc) you can track changes history by clicking on the button “Changes History” in the data table (column “Actions” on the right side of table).



Populate the custom Choice Field options from the external SharePoint list

The app allows for creating custom fields for timesheets and time-off requests. One of the custom field types is **"Choice from External SharePoint List**" which allows to dynamically populate the Choice Field options from the external SharePoint list on the parent SharePoint Site.

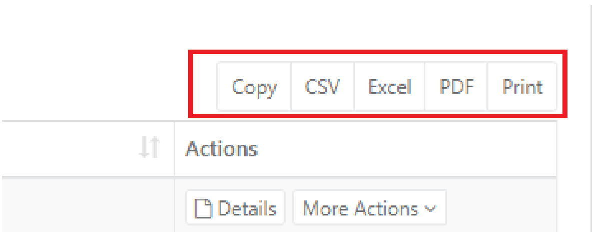
To configure this type of field, you need to change the "Type" field to the value "Choice from External SharePoint List", afterward select the list name from the drop-down, and enter the column name from which the app will get data (usually it’s field called *Title*, which exists on each SharePoint list)



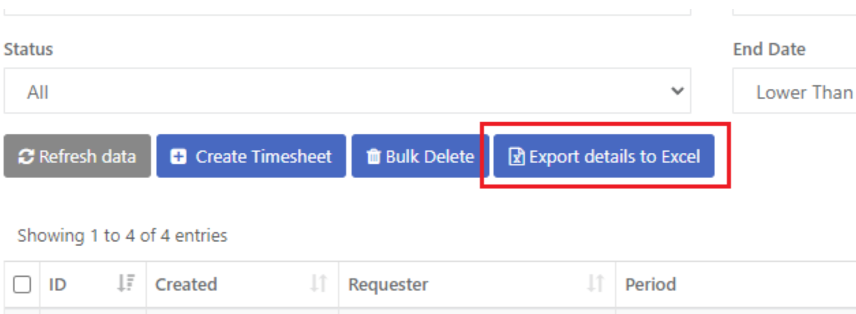
Data export

The app supports data export to MS Excel spreadsheet. There are two export options available:

1) Each data table contains small export buttons located above the data table, this export mode is a simple “snapshot” of the table (export includes only the column disabled in the data table)



2) For complex objects that might contain custom fields like time-off request, timesheets or project, there is a separate button available called “Export details to MS Excel” which export all metadata including custom fields.

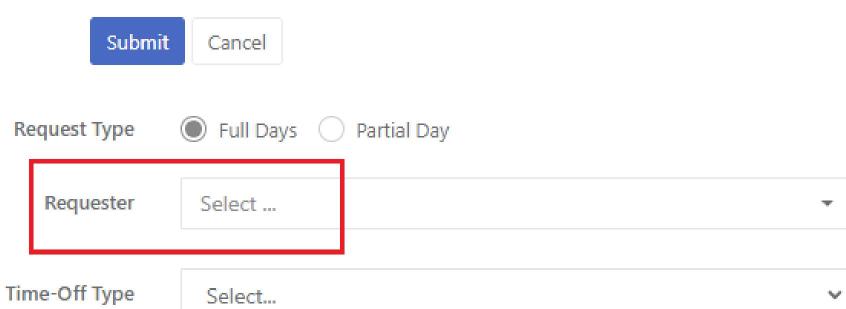


Creating time-off requests on behalf of the user

Creating time-off requests on behalf of others is available for managers (only for subordinates) and app administrators.
Managers can create requests on behalf of subordinates by clicking on the button “Create Time-Off” under Team Management → Time-Off → Time-Off Report.

Administrators can create requests on behalf of any user by clicking on the button “Create Time-Off” under Administration → Time-Off → Time-Off Report.

An additional field “Requester” allows the selection of the user on whose behalf the application is created.

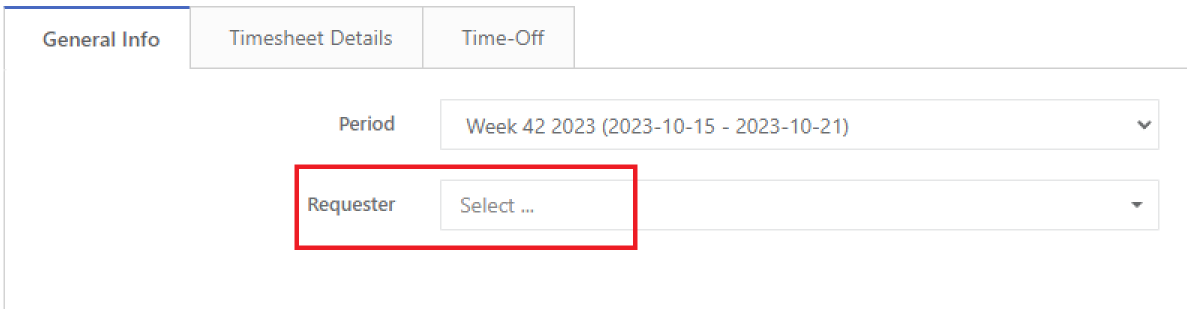


Creating timesheets on behalf of the user

Creating timesheets on behalf of others is available for managers (only for subordinates) and app administrators.
Managers can create timesheets on behalf of subordinates by clicking on the button “Create Timesheet” under Team Management → Timesheets→ Timesheet Report.

Administrators can create timesheets on behalf of any user by clicking on the button “Create Timesheet” under Administration ➔ Timesheets➔ Timesheet Report

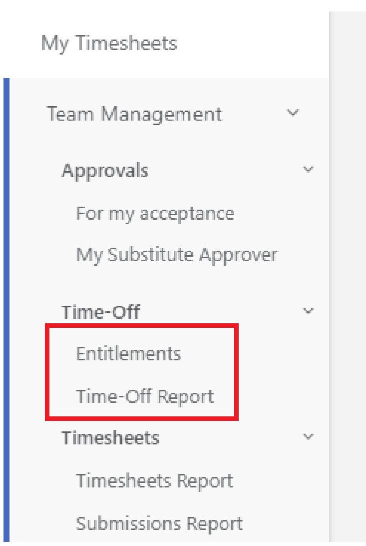
An additional field “Requester” allows the selection of the user on whose behalf the application is created.



REPORTS

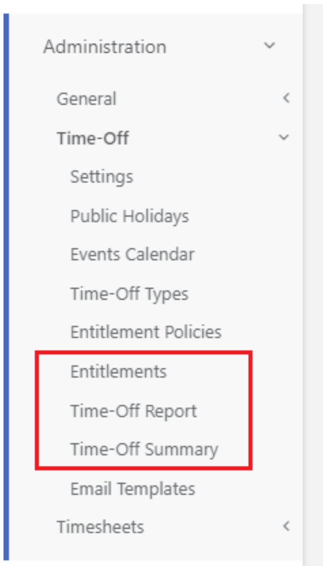
Time-Off Reports available for Managers

Reports available for managers are located under the section Team Management ➔ Time-Off in the left menu. Manager-specific reports exclusively present data from the manager's subordinates.

Location in the left menu	Report	Description
	Entitlements	Displays a list of time-off entitlements assigned to the manager’s subordinates. Allows data filtering and export to MS Excel. This report works in the read-only mode - the manager cannot delete or edit the user’s entitlements.
	Timesheet Report	Display time-off requests from the manager’s subordinates. Allows data filtering, export to MS Excel, or creating requests on behalf of the user. This report works in the read-only mode - the manager cannot delete time-off requests.

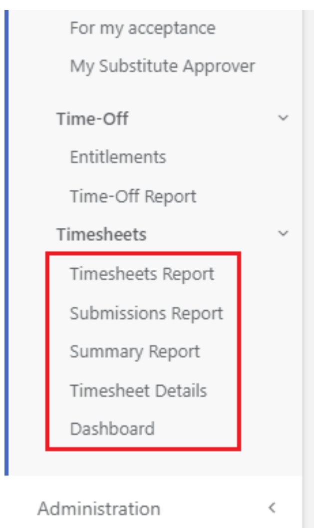
Time-Off Reports available for Administrators

Reports available for administrators are located under the section Administration>Time-Off in the left menu.

<table>
<tr><th>Location in the left menu</th><th>Report</th><th>Description</th></tr>
<tr><td rowspan="3">
</td><td>Entitlements</td><td>Display time-off entitlements for all app users.
Allows data filtering and export to MS Excel.
This report allows admins deletion and editing of entitlement entries.</td></tr>
<tr><td>Time-Off Report</td><td>Display time-off requests for all app users. Allows data filtering, export to MS Excel, or creating requests on behalf of the user.
This report allows admins to delete time-off requests, also in bulk mode (to “clear” test data).</td></tr>
<tr><td>Time-Off Summary</td><td>Enables the accurate calculation of the total leave requests submitted by the user within a specified timeframe, such as a particular month or the entire year. Results are given in 4 different categories
● "Approved Working Days"
● "Pending Approval Working Days"
● "Canceled Working Days"
● "Rejected Working Days"</td></tr>
</table>

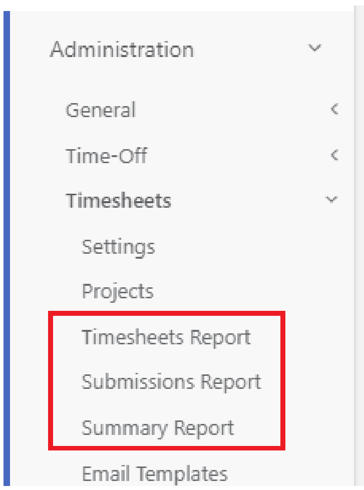
Timesheet Reports available for Managers

Reports available for managers are located under the section Team Management ➔ Timesheets in the left menu. Manager-specific reports exclusively present data from the manager's subordinates.

<table>
<tr><th>Location in the left menu</th><th>Report</th><th>Description</th></tr>
<tr><td rowspan="5">
</td><td>Timesheet Report</td><td>Display general information about timesheets from the manager’s subordinate (period, status etc). Allows data filtering, export to MS Excel, or creating timesheets on behalf of the user.</td></tr>
<tr><td>Submission Report</td><td>Displays the consolidated timesheet submission status for a specific period (by default the current period) from the manager's team members (e.g. users who have not created or not submitted the timesheets yet)</td></tr>
<tr><td>Summary Report</td><td>Allows calculation of total timesheet hours from managers' subordinates, aggregated by different criteria (e.g. user, project, status, etc). For example, the manager can check how many hours have been reported for a specific project in a specific period.</td></tr>
<tr><td>Timesheet Details</td><td>Provides a consolidated view of all timesheet details, including information about projects, tasks, and hours from all of the manager's subordinates. This eliminates the need to switch between different timesheets and allows the manager to conveniently assess work progress in a single glance.</td></tr>
<tr><td>Dashboard</td><td>Visual analytics dashboard which displays aggregated metrics from timesheets created by managers' subordinates (e.g. total draft timesheets, total hours per project, etc.)</td></tr>
</table>

Timesheet Reports available for Administrators

Reports available for administrators are located under the section Administration ➔ Timesheets in the left menu.

<table>
<tr><th>Location</th><th>Report</th><th>Description</th></tr>
<tr><td rowspan="3">
</td><td>Timesheet Report</td><td>Display general information about timesheets from all users (period, status, etc). Allows data filtering, export to MS Excel, creating timesheets on behalf of the user, and bulk-deletion of timesheets (e.g to “clear” test data)</td></tr>
<tr><td>Submission Report</td><td>Displays the consolidated timesheet submission status for a specific period (by default the current period) from all users (e.g. users who have not created or not submitted the timesheets yet)</td></tr>
<tr><td>Summary Report</td><td>Allows calculation of total timesheet hours from all users, aggregated by different criteria (e.g. user, project, status, etc). For example, the administrator can check how many hours have been reported for a specific project in a specific period.</td></tr>
</table>

LICENSING

Plans and Pricing

The app is sold in two billing models:

Option 1) Yearly subscription (paid once a year), the pricing works per group of users (not per user).

For example, if you have 15 users in your organization, you may choose plan "20 users."

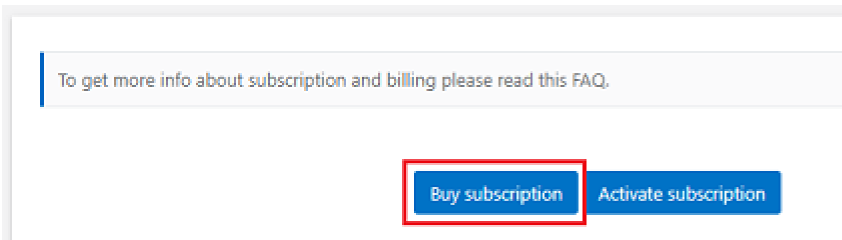
Option 2) Lifetime license for unlimited users, which is a one-time payment (not per user and not per year).

Detailed pricing is included on the product site in the section “Plans and Pricing”: https://ivero.net/solutions/WorkTimePro/index.html

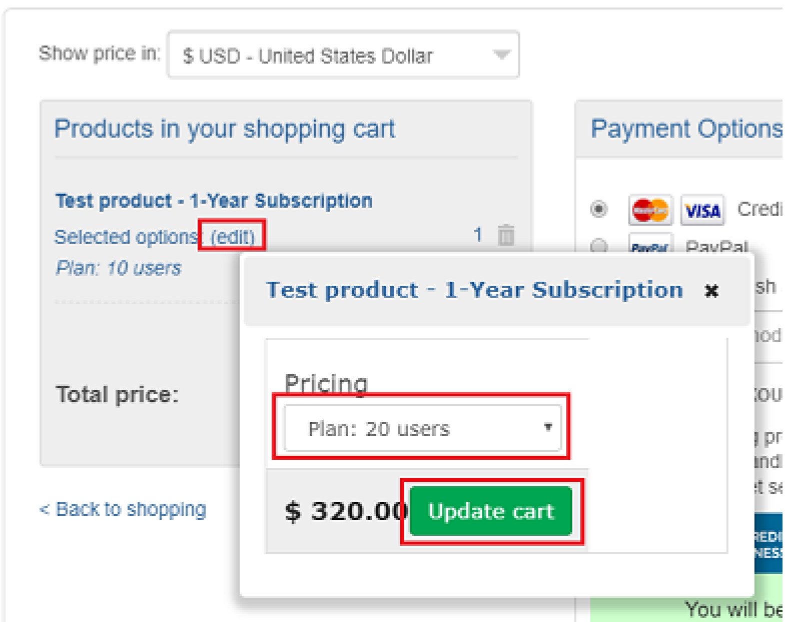
Trial version activation

Steps to purchase a license (transform the trial into a full version)

Step 1) Open the "Subscription" page under the "Administration" section and click "Buy subscription"



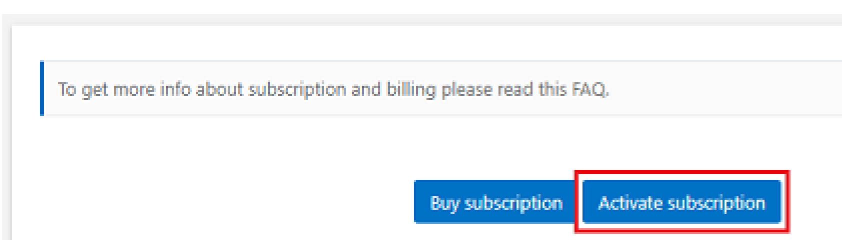
Step 2) Select the proper subscription plan (e.g. up to 20 users) or lifetime license



Step 3) Proceed with the payment

Step 4) After successful payment, you will receive a confirmation to the email address provided on the order form.

Please click on "Activate subscription" and enter the email address provided on the order form.



Subscription management

Information about license renewal (in case of annual subscriptions), changing license type, and other license-related topics are described in the billing FAQ: https://ivero.net/faq-billing.html