COVID Safeguard Add-In
(User manual)

By

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1. Welcome to COVID Safeguard Enterprise add-in

We are glad that you decided to try COVID Safeguard Enterprise add-in by Ignatiuz. Ignatiuz is a leading IT solutions provider providing custom SharePoint development solutions.

This add-in is a package of everything that you would need to manage your employee timesheets. With a quick setup process and friendly user interface, the add-in offers an easy learning curve for the users.

The COVID Safeguard Enterprise add-in runs with Office 365 and SharePoint on-premise. It is a user-friendly add-in allowing employees to submit their weekly timesheets and managers to approve the submitted timesheets. The convenient reporting feature allows managers and administrators to generate reports of work done throughout the week.

Few of the salient features of the COVID Safeguard Enterprise add-in are:
● Quick and easy tracking of work hours.
● Role-based access.
● Cloud-based solution.
● Manager’s approval with comments.
● Detailed reporting.
● Completely secure with all your data lying in your own environment.

We hope that your employees will love using COVID Safeguard Enterprise add-in, resulting in increased returns on your technology investments.

2. Technical Specification

● SharePoint on-premises.
● Office 365.
● Admin rights required to install the app.
● Users should have the edit/contribute permission to use the app.

3. User permissions to access the add-ins

All the users accessing COVID Safeguard should have “Edit” and “Contribute” permissions.

To give permissions to users and group please follow below steps:-
✓ Click on the gear icon and select “Site Settings”.
✓ In Site Settings, select “Site permissions”.
✓ Click on “Check Permissions”.

![Check permissions screenshot](image)
✓ Enter Username / Group in the text box.
✓ Click on “Check Now”.
✓ It will show the current permissions granted to the user or group.
✓ The user or group should always have either “edit” or “Contribute” permission.

✓ As shown in the above screenshot “Administrator” have contribute permission in the “Timesheet Users” group, so it can access the Timesheet app smoothly.
4. **Workflow**

✓ Below is the workflow for Timesheet add-in:

![Workflow Diagram]

5. **Logging On**

Once the user is logged in to the Office 365 environment and if the add-in is already installed, it can be opened as shown below:
✓ Go on site contents
✓ On clicking on site contents, it will show all the installed add-ins.
✓ Start the add-ins by clicking on it.
✓ Depending on the logged-in user, the add-in will open Manager, Employee or Guest portal.
✓ Logging in for the first time to the add-ins will always open the Administrator portal.

5.1. System Menu

The system menu appears on the left and it is different for Manager and Employee. See below for the difference and uses:

1. Administrator
2. Manager Portal
3. Manager’s -Manager Portal
4. Employee portal
5. Guest User portal
5.1.1. **Administrator**

The administrator portal can be used for coordinating all the features that a timesheet Manager, the employee needs to work upon. The administrator has the main right to create a user role in the system that will help the organization to run smoothly.

Mentioned below shows how to use the Administrator Portal:

There are 5 major features that are provided to this user, such as:-

- **Administration** – Can add new user roles, user, project, tasks and view reports.
  - **User Roles** – Can assign roles to created users.
  - **Users** – Can create new users.
  - **Reports** – Can view Advance, Daily, Weekly, and Employee project reports on the worked projects and tasks by all employees.
  - **Grant permission** - Giving permission to users to login as different users.

5.1.2. **Manager’s - Manager Portal**

Manager’s - Manager portal can be used for viewing all the submitted Timesheet by the subordinates with their current status. Mentioned below shows how to use the Manager’s - Manager Portal:

✓ There are 4 major features that are provided to this user, such as:
  - **My Timesheet** - Can check the status of his own timesheet.
  - **Draft** - Will show timesheet pending for submission or in the creation process.
  - **Pending Approval** - Will show pending timesheet which are pending for approval.
  - **Approved** - Will show all the approved timesheet.
  - **Reject** – Will show all the rejected timesheet.
Timesheet - To check the timesheet status of the employee.
  ● Pending Approval- Will show pending timesheet which are pending for approval.
  ● Reject – Will show all the rejected timesheet.
  ● Approved- Will show all the approved timesheet.

Management - Can see his own Timesheet and create new timesheets.
  ● Manager portal.
  ● Employee portal.
  ● New Timesheet.

Administration – Can add new user, project, tasks and view reports.
  ● Users – Can create new users.
  ● Project and task settings – Can create new projects, tasks and assign tasks to projects.
  ● Advance reports – Can view Advance, Daily, Weekly, and Employee project reports on the worked projects and tasks by all employees.
  ● Document library - Can view the documents uploaded by the admin.
  ● Help– Will show the Guide of the site.

5.1.3. Manager Portal
The manager portal can be used to view all the submitted Timesheet with their current status. Mentioned below shows how to use the Manager Portal:

There are 3 major features that are provided to this user, such as:

Timesheet– To check the timesheet status of the employee.
  ● Pending Approval– Will show pending timesheet which are pending for approval.
  ● Reject – Will show all the rejected timesheet.
  ● Approved– Will show all the approved timesheet.

Management– Can see his own Timesheet.
  ● Manager portal.

Administration – Can add new user, project, tasks and view reports.
  ● Users – Can create new users
  ● Project and task settings – Can create new projects, tasks and assign tasks to projects.
  ● Reports – Can view Advance, Daily, Weekly, and Employee project reports on the worked projects and tasks by all employees.
5.1.4. **Employee Portal**

The employee portal can be used for adding the employee working details and can also check all the submitted Timesheet with their current status of its own. Mentioned below shows how to use the employee Portal:

✓ There are 3 major features that are provided to this user, such as:
  - **Timesheet** - To check the timesheet status of the employee.
    - Pending Approval - Will show timesheet which are pending for approval.
    - Reject – Will show all the rejected timesheet.
    - Approved – Will show all the approved timesheet.
  - **Management** – Can see his own Timesheet and create new timesheets.
    - Employee portal
    - New Timesheet
  - **Administration** – Can add new tasks and view reports.
    - Project Tasks – Can add a new task and assign it to the project.
    - Reports – Can view Advance, Daily, Weekly, and Employee project reports on the worked projects and tasks by all employees.
    - Document library - Can view the documents uploaded by the admin.
    - Help – Will show the Guide of the site.

5.1.5. **Guest Portal**

The guest portal can be used only for viewing the user guide. Below shows how to use the guest portal:
6. How to use the add-in

6.1. User Roles

The administrator can add new user roles.
✓ On the dashboard under Administration, “User Roles” option is present.
✓ Clicking on “User Roles” create new user roles form gets open.

✓ Select the Role
✓ Enter the user name field click on “Save”.
✓ The associated email id of the user will be auto fetched in the “User Email” table when saved.
✓ On user role page if there is only one Administrator then that Admin cannot be deleted until authority is not assigned to another administrator.
✓ Also if the manager is associated with any Employee then that Manager will not get deleted.
✓ The admin can also import the bulk user roles by click on “Import bulk administrator/manager” in the given excel file format.
   ▪ First, see the file format by place the cursor on the information icon and create a file for import in the same format.

   ● Select the file and then click on the “Upload” button to import all the users of the file in a single click.

6.2. Users

Administrator, Manager and Manager’s -Manager can add new users.
● At the dashboard under Administration “Users” option is present.
● Clicking on “Users” create new user form gets open.

   ● Administrator/Manager/ Manager’s -Manager can create a new user by:-
     ○ Enter employee name in the Employee field.
○ The associated email id of the employee will be auto fetched in the “Employee Email” text box.
○ Select manager “Name” from the dropdown.
○ The associated email id of the manager will be auto fetched in the “Manager Email” text box.
○ Click on the “Save” button to create a new Employee user.
○ If there is a single timesheet of the employee present in the application then the employee will not get deleted.
○ They can also import the bulk users by click on “Import employee” in the given excel file format. First, see the file format by place the cursor on the information icon and create a file for import in the same format.

○ Select the file and then click on the “Upload” button to import all the users of the file in a single click. The added record will appear on the same page in a tabular format under employee form

● Here the employee is approving the timesheet sent to the manager for approval.

● In the below image we can see the timesheet is getting approved from employee login as manager and all the activity which an employee has performed in the manager account is logged on the log page.