



# LTAPPS Timesheet

## Configuration Guide

Version 1.0

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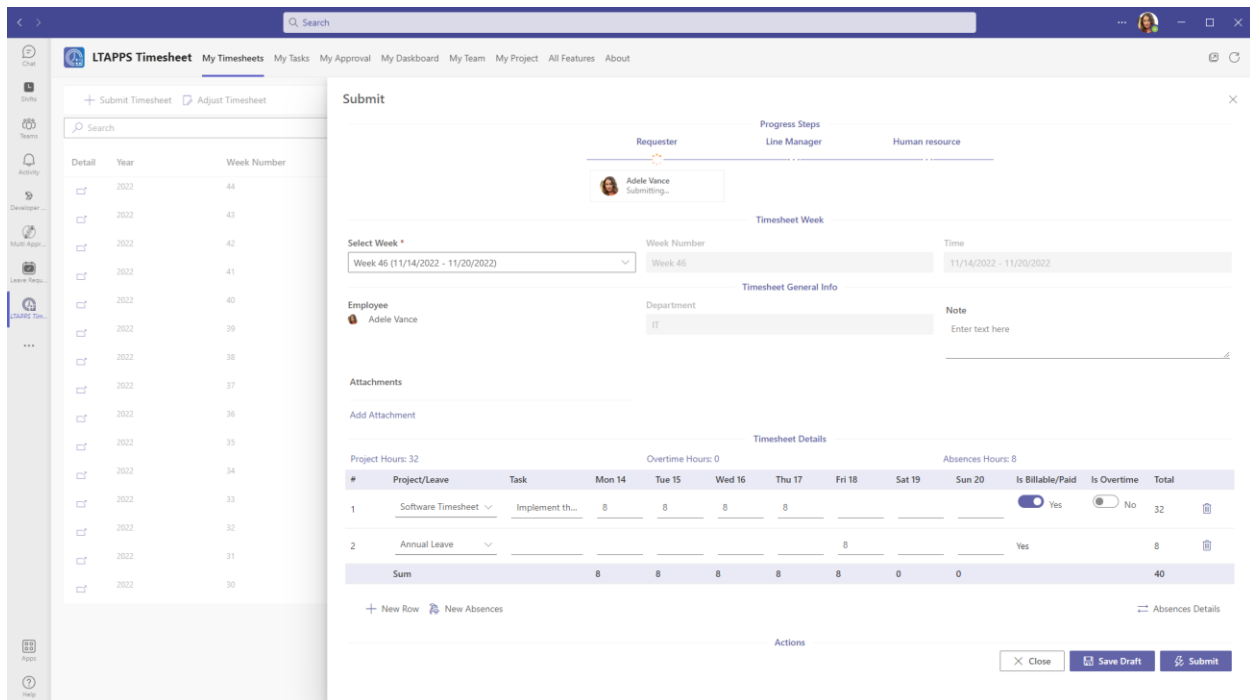
# LTAPPS Timesheet

LTAPPS Timesheet is a time tracking app that works with SharePoint & Microsoft Teams

## Overview

LTAPPS Timesheet is a time-tracking app that works with SharePoint & Microsoft Teams(Including mobile). The app offers a solution to allow you to track your work time. The app helps you track & manage how much time you/your employee spend on projects. The employee/manager is able to easily track the regular work hours, overtime, or absences

The app allows the export of employee's timesheets to an excel file with exactly the day/hour employees spend



**Submit**

Requester: Adele Vance (Submitting...)

Line Manager: [Empty]

Human resource: [Empty]

Timesheet Week: Week 46 (11/14/2022 - 11/20/2022)

Employee: Adele Vance

Department: IT

Note: Enter text here

#	Project/Leave	Task	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Is Billable/Paid	Is Overtime	Total
1	Software Timesheet	Implement th...	8	8	8	8				Yes	No	32
2	Annual Leave						8			Yes		8
<b>Sum</b>			<b>8</b>	<b>8</b>	<b>8</b>	<b>8</b>	<b>8</b>	<b>0</b>	<b>0</b>			<b>40</b>

Project Hours: 32 | Overtime Hours: 0 | Absences Hours: 8

Actions: Close, Save Draft, Submit

## Fields Setting

The feature supports customizing the timesheet form. With this feature, you can add/edit or show/hide the field

There are 2 lists


- Timesheet general: The list contains fields such as the year, week, department, note, or attachments, ...
- Timesheet details: The list contains fields such as the project, leave type, task, or days, ...

**Note:** After creating the field, you cannot delete the field. If you don't want to display the field in the form, please inactive the field

## Timesheet General Fields

[Timesheet info fields](#) [Timesheet details fields](#)

[+ New Field](#) [Update Configuration](#)

Display Name	Static Name	Type	Order	Active
sysNote	TSF_Note	Note	1	<input checked="" type="checkbox"/>
Attachments	Attachments	Attachments	2	<input checked="" type="checkbox"/>
 FieldTest	FieldTest	Text	3	<input checked="" type="checkbox"/>

Follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Fields Setting
  - Create a new field
    - Click on the New Field button
- [+ New Field](#) [Update Configuration](#)
- In the panel appearing,

## Field

### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, €, £)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Image
- Task Outcome
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data
- Rich media data for publishing
- Managed Metadata

### Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

- Existing group:
- New group:

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes  No

Date and Time Format:

- Date Only  Date & Time

Display Format:

- Standard  Friendly

Default value:

- (None)  
 Today's Date

Enter date in M/D/YYYY format.

Calculated Value:

Column Formatting:

Change the display of this column by adding JSON below.

Remove the text from the box to clear the custom formatting.

[Learn more about formatting columns with JSON](#)

### Update List and Site Content Types

Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?  
 Yes  No

[Column Validation](#)

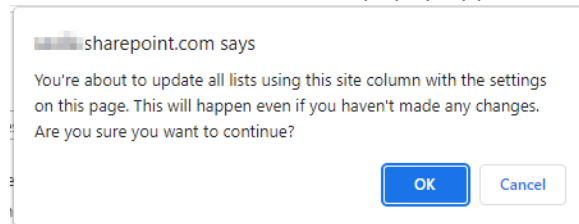
- Column Name: The field name, recommend you should use a simple name with only the alphabet & numbers, don't use any special characters. You can change the name in the edit form
- Type: The app supported the types
  - Single line of text
  - Multi line of text
  - Choice
  - Number
  - Currency
  - Date & Time
  - Lookup
  - Yes/No
  - Person or Group
- Group: Select LTAPPS Site Column
- Update all content types inheriting from this type: Yes
- Click on the Ok button
- The panel redirects to another page, ignore this page by closing the panel

• Edit the field



- Click on the edit icon of the field you want to edit



- In the panel appearing, edit the field
- Click on the Ok button, and a popup appears to confirm. Click on the Ok button





• Order the field

Display Name	Static Name	Type	Order	Active
sysNote	TSF_Note	Note	1	<input checked="" type="checkbox"/>
Attachments	Attachments	Attachments	2	<input checked="" type="checkbox"/>
 FieldTest	FieldTest	Text	3	<input checked="" type="checkbox"/>
 Date	Date1	DateTime	4	<input checked="" type="checkbox"/>

- Use the Order dropdown to order the field where the field displays in the form

• Show/hide the field

Display Name	Static Name	Type	Order	Active
sysNote	TSF_Note	Note	1	<input checked="" type="checkbox"/>
Attachments	Attachments	Attachments	2	<input checked="" type="checkbox"/>
 FieldTest	FieldTest	Text	3	<input checked="" type="checkbox"/>
 Date	Date1	DateTime	4	<input type="checkbox"/>

- Use the Active toggle to show or hide the field in the form
- Click on the Update Configuration to save any changes. Please refresh the page for changes to take effect

[+ New Field](#) [Update Configuration](#)

## Timesheet details fields

[Timesheet info fields](#) [Timesheet details fields](#)

[+ New Field](#) [Update Configuration](#)

Display Name	Static Name	Type	Order	Active
sysProject	TSF_Project	Lookup	1	<input checked="" type="checkbox"/>
sysLeaveType	TSF_LeaveType	Lookup	2	<input checked="" type="checkbox"/>
sysTask	TSF_Task	Note	3	<input checked="" type="checkbox"/>
sysDay1	TSF_Day1	Number	4	<input checked="" type="checkbox"/>
sysDay2	TSF_Day2	Number	5	<input checked="" type="checkbox"/>
sysDay3	TSF_Day3	Number	6	<input checked="" type="checkbox"/>
sysDay4	TSF_Day4	Number	7	<input checked="" type="checkbox"/>
sysDay5	TSF_Day5	Number	8	<input checked="" type="checkbox"/>
sysDay6	TSF_Day6	Number	9	<input checked="" type="checkbox"/>
sysDay7	TSF_Day7	Number	10	<input checked="" type="checkbox"/>
sysIsBillable	TSF_IsBillable	Boolean	11	<input checked="" type="checkbox"/>
sysNote	TSF_Note	Note	12	<input type="checkbox"/>
sysRatingMode	TSF_RatingMode	Text	13	<input checked="" type="checkbox"/>
sysRate	TSF_Rate	Number	14	<input checked="" type="checkbox"/>
sysIsOvertime	TSF_IsOvertime	Boolean	15	<input checked="" type="checkbox"/>

Please refer to the guideline of “Timesheet General” above

# Views Settings

Settings > Views Setting

[My Requests](#)
[My Tasks](#)
[My Approvals](#)
[Searching](#)
[Employee Report - Timesheet Detail](#)
[Manager Report - Timesheet Detail](#)

[Update Configuration](#)

#	Display Name	Static Name	Type	Order	Show/Hide
1	sysYear	TSF_Year	Number	1	<input checked="" type="checkbox"/>
2	sysWeekNumber	TSF_WeekNumber	Number	2	<input checked="" type="checkbox"/>
3	sysStartDate	TSF_StartDate	DateTime	3	<input checked="" type="checkbox"/>
4	sysToDate	TSF_ToDate	DateTime	4	<input checked="" type="checkbox"/>
5	sysStageLookup	TSF_StageLookup	Lookup	5	<input checked="" type="checkbox"/>
6	sysStatus	TSF_Status	Number	6	<input checked="" type="checkbox"/>
7	sysTotalHours	TSF_TotalHours	Number	7	<input checked="" type="checkbox"/>
8	sysNote	TSF_Note	Note	8	<input checked="" type="checkbox"/>
9	sysRequestMode	TSF_RequestMode	Number	9	<input checked="" type="checkbox"/>
10	sysEmployee	TSF_Employee	User	10	<input type="checkbox"/>
11	sys_Department	TSF_Department	Lookup	10	<input type="checkbox"/>
12	sysProjectHours	TSF_ProjectHours	Number	17	<input type="checkbox"/>
13	sysOvertimeHours	TSF_OvertimeHours	Number	17	<input type="checkbox"/>
14	sysAbsenceHours	TSF_AbsenceHours	Number	17	<input type="checkbox"/>
15	sysBillingHours	TSF_BillingHours	Number	17	<input type="checkbox"/>
16	sysNonBillingHours	TSF_NonBillingHours	Number	17	<input type="checkbox"/>

The feature support customizing the view or report. With this feature, you can show/hide or order the field in the view

There are 6 views or reports you can custom

- My timesheet
- My Task
- My approval
- Search
- Timesheet details: For employee
- Timesheet details: For the manager

Follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Views Setting
- Show/hide the field: use the show/hide toggle



- Order: use the Order dropdown



Order

1	▼
2	▼












- Click on the Update Configuration to save any changes. Please refresh the page for changes to take effect

[+ New Field](#) [📄 Update Configuration](#)

## Workflows

Settings > Workflows

[+ New](#) ✓ Active ○ Inactive

	Title	Assign To	Select User	Next Step	Email Templates	Order
	Requester			Line Manager		1
	Line Manager		✓	Human resource	  	2
	Human resource		✓	Finished	  	3
	Finished					

The feature support set up the approval process for the timesheet. With this feature, you can customize the approval process by adding/deleting the step. And you can also fork the process by conditions

Follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Workflows
- Add a new step, click on the New button

### Workflow ✕

**Title**

Title

**Approver**

Is requester  No

Is line manager

Is Human Resource

The user selects the next approver when submitting/approving  Yes

Choose users from SharePoint Group

**Need all apppvers approve**

Need all apppvers approve  Yes

**Next Step**

Condition 1  Show

Field Name	Operator	Value
<input type="text" value="sys Department"/>	<input type="text" value="Equal"/>	<input type="text" value="Accounting"/> <input type="text" value="None"/>

Next step

Condition 2  Hide

Condition 3  Hide

**Default**

Next step

**Reject: back to step**

Reject: back to step

**Allow Edit Fields**

Allow Edit Fields  No

**Active**

Active  Yes

**Order**

Order

- Title: The step name
- In the Approver section, it has 4 options
  - Is Requester: if select is Yes, the approver is the Requester who submitted the timesheet
  - Is Line Manager:
    - No: The app doesn't automatically get the manager. The end-user will choose the next approver
    - From User Info List: The app automatics get the manager who has been configured on the Employees List
    - From Manager of Department: The app automatics get the manager who has been configured in the Departments list
  - Is Human Resources:
    - No: The app doesn't automatically get the human resource. The end-user will choose the next approver
    - From User Info List: The app automatics get the human resource who has been configured on the Employees List
    - From Manager of Department: The app automatics get the human resource who has been configured in the Departments list
  - The user selects the next approver when submitting/approving
    - Yes: The end-user will select the approver when submitting/ Approving the timesheet
    - No: The app will get the approver. There are 2 options
      - The approver is a SharePoint group. Any member of this group can approve the timesheet
      - The approver is/are the specific person
- Need all approvers to approve: The timesheet was sent to 2 approvers.
  - Yes: Need 2 approvers to approve before the timesheet sends to the approver of the next step
  - No: Need only an approver to approve before the timesheet sends to the approver of the next step

- In the Next Step section, it has 4 options: 3 conditions & 1 default. The priority order: Condition 1 > Condition 2 > Condition 3 > Default. It means if the request hits condition 1, the next step of the process is the next step configured in condition 1. The same with conditions 2 & 3. If the request doesn't hit 3 conditions, it will jump to the default next step
  - 3 conditions: The field name only displays fields that have the type: Number, Dropdown, Lookup, or Yes/No
  - 3 conditions: The next step only displays steps if the next step has:
    - Is requester
    - Is manager
    - Is human resource
    - The user selects the next approver when submitting/approving: No
- In the Reject: back to the step section, this is the step if the approver clicks the reject button
- In the Can Edit section, if Yes the approver can edit fields when approving the request. In the Can edit fields section, choose fields that the approver can edit. If empty, the approver can edit all fields that setup in the Field tab
- Active section: Don't use the step
- Click on the Save button

## Notification Email Template

### Email Template

CC Steps

CC Steps

CC Users

CC Users \*

CC Users in the field

Fields

CC Current User

CC Current User  Yes

Subject

Timesheet - [%TSF\_Employee%] ([%TSF\_Year%] - [%TSF\_WeekNumber%]) - Approval

Body

Hello there,

You've received a new Timesheet. Approve it by accessing the link [%Here%].

The timesheet's info

- Employee Name: [%TSF\_Employee%]
- Department: [%TSF\_Department%]
- Year: [%TSF\_Year%]
- Week: [%TSF\_WeekNumber%]
- From: [%TSF\_StartDate%]
- To: [%TSF\_ToDate%]
- Mode: [%TSF\_RequestMode%]

> Fields list support

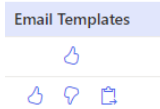
The feature support editing the notification email template when submitting/approving/delegating the timesheet

There are 3 types

- Submit/Approve:
- Reject
- Delegate

Follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Workflows
- In the Email Templates column, click on the icon of the email template you want to edit



- In the form appearing
  - CC Steps: CC the person who is the approver of the step
  - CC Users
  - CC Fields: CC the users in the field (People field)
  - CC Current User:
    - Yes: CC the current user who submitting the timesheet
    - No: Don't add the current user to CC
  - Subject: Refer to the field list support to add the value of the field to the email
  - Body: Refer to the field list support to add the value of the field to the email

- Fields list support

#	Static Name	Title
1	[%Here%]	Here
2	[%TSF_Employee%]	Employee
3	[%TSF_Department%]	Department
4	[%TSF_Year%]	Year
5	[%TSF_WeekNumber%]	Week Number
6	[%TSF_StartDate%]	From Date
7	[%TSF_ToDate%]	To Date
8	[%TSF_ProjectHours%]	Project Hours
9	[%TSF_OvertimeHours%]	Overtime Hours
10	[%TSF_AbsenceHours%]	Absences Hours
11	[%TSF_BillingHours%]	Billing Hours
12	[%TSF_NonBillingHours%]	Non Billing Hours
13	[%TSF_TotalHours%]	Total Hours
14	[%TSF_RequestMode%]	Request Mode (New or Adjust)
15	[%TSF_Comment%]	Comment when approving the request
16	[%TSF_Note%]	sysNote

- Note: if copy the field, please copy the field to the notepad first. After that copy it from the notepad to the Subject or body. This step to remove all the HTML tags in the field

## General Configurations

[Save](#)

Enable Rating Feature  
 No

Enable Overtime Feature  
 Yes

Enable Delegate Feature  
 Yes

Week number type  
 Iso week number

Fiscal Year of Absences  
Jan 1st - Dec 31st

Date format  
MM/DD/YYYY

Min/Max hours when submitting the timesheet  
Min 1 Max 80

Weekend  
Saturday, Sunday

[Edit the reminder email template](#)

Max Items  
5000

All users option (Restrict the users displays of the employees field in the search, report pages)  
All Users in SharePoint site

System Admins  
Lee Gu, Adele Vance

Administrators  
Adele Vance

Who can submit on behalf the timesheet for the employee  
[Empty dropdown]

The home page URL of the app  
<https://szc8k.sharepoint.com/sites/Timesheet1/SitePages/Timesheet.aspx>

SharePoint site URL  
<https://szc8k.sharepoint.com/sites/Timesheet1>

[Click this link to update the URL](#)

### Follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > General Configuration
- Configurations
  - Enable Rating Feature: If yes, the rating field will display when submitting the timesheet

- Enable Overtime Feature: If yes, the Is Overtime field will display when submitting the timesheet
- Enable Delegate Feature: If yes, the delegate button will display when the approver approves the timesheet
- Week Number Type: Iso Week number mode or Simple mode
- Fiscal Year of Absences
- Date Format
- Min/Max hours when submitting the timesheet: The validation min/max hours
- Weekend
- Edit the reminder email template
- Max items: the setting to improve the performance.
- All user options: Restrict the user's displays of the employee's field in the search/report pages
- System Admin: By default, if the user has full control permission in the SharePoint where the app is installed => the user is a System, Admin. This setting allows adding more
- Administrator: the user who is the administrator
- Who can submit on behalf the timesheet for the employee: Manager/ Human Resource
- The Home page URL of the app: The SharePoint page URL where the home web part is added. This setting is required if the app used on the MS Teams
- SharePoint site URL: This setting only displays on MS Teams, it allows to change the SharePoint site where the app on MS Team is linked
- Click on the Update Configuration to save any changes. Please refresh the page for changes to take effect

## Translations

Settings > Translation

[Save](#)

#	Key	English	Translation
2	Home	Home	Home
3	AllFeatures	All Features	All Features
4	HomeTabMyTimesheet	My Timesheets	My Timesheets
5	HomeTabMyTasks	My Tasks	My Tasks
6	HomeTabMyApproval	My Approval	My Approval
7	HomeTabMyDashboard	My Daskboard	My Daskboard
8	HomeTabMyTeam	My Team	My Team
9	HomeTabMyProject	My Project	My Project
10	FormView	View	View
11	FormNew	Submit	Submit
12	FormEdit	Edit	Edit

The feature support translating English to another language

Follow the steps below



- Open the app, and click on the All Features button. Then click on the Settings section > Translation
- Translate the text
- Click on the Save button to save any changes. Please refresh the page for changes to take effect

## Advance Permissions

Settings > Advanced permissions for the App Lists

#	Title	Description	Permissions	Advanced Settings
1	The employees list	The employees list	Permissions	Advanced Settings
2	The departments list	The departments list	Permissions	Advanced Settings
3	The projects list	The projects list	Permissions	Advanced Settings
4	The leave types list	The leave types list	Permissions	Advanced Settings
5	The workflows list	The workflows list	Permissions	Advanced Settings
6	The email templates for the workflow	The email templates for the workflow	Permissions	Advanced Settings
7	The email templates for the workflow	The email templates for the workflow	Permissions	Advanced Settings
8	The balances list for the employees	The balances list for the employees	Permissions	Advanced Settings
9	The timesheet info list for the process	The timesheet info list for the process workflow	Permissions	Advanced Settings
10	The timesheet info final	The timesheet info list after completed the process workflow	Permissions	Advanced Settings
11	The tasks list for the process workflow	The tasks list for the process workflow	Permissions	Advanced Settings
12	The configurations list	The configurations list	Permissions	Advanced Settings

### Advance Permission

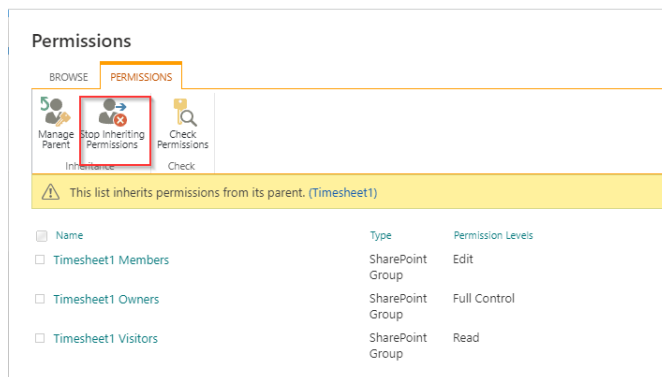
By default, the user only needs contributor permission on the SharePoint site where the app is installed => the user can use the app

If you want to the app be more secure, you can reset the permission for each SharePoint list where the app stores the data. You should set

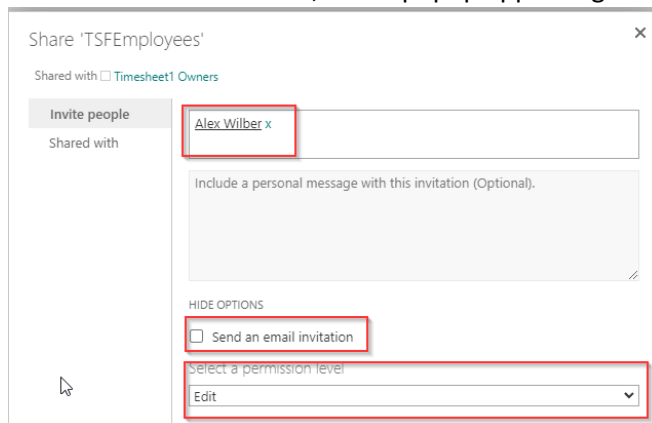
#	List	Normal user	Manager	Human Resource	Project Manager	Administrator	System Admin
1	The Employee List	Read	Read	Read	Read	Contribute	Full Control
2	The department list	Read	Read	Read	Read	Contribute	Full Control
3	The projects list	Read	Read	Read	Contribute	Contribute	Full Control
4	The leave types list	Read	Read	Read	Read	Contribute	Full Control
5	The workflows list	Read	Read	Read	Read	Read	Full Control
6	The email templates for the workflow	Read	Read	Read	Read	Read	Full Control
7	The email templates for the others	Read	Read	Read	Read	Read	Full Control
8	The balances list for the employees	Read	Read	Read	Read	Contribute	Full Control
9	The timesheet info list for the process	Contribute	Contribute	Contribute	Contribute	Contribute	Full Control
10	The timesheet info final	Read	Contribute	Contribute	Contribute	Contribute	Full Control
11	The tasks list for the process workflow	Contribute	Contribute	Contribute	Contribute	Contribute	Full Control
12	The configurations list	Read	Read	Read	Read	Read	Full Control

To reset the permission for each SharePoint list, follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Advanced permissions for the app lists
- Click on the key icon of the Permission
- In the panel appearing, click on the Stop Inheriting Permissions in the ribbon



- Select all permissions & click on the Remove User Permissions in the ribbon
- Click on Grant Permission, in the popup appearing

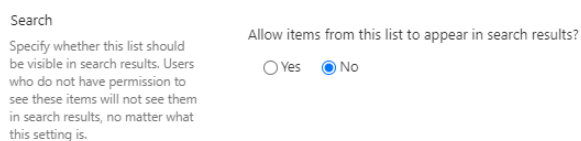


- Add permissions as in the table above. Then click on the Share button

## Turn off the recent activity

Something the Recent Activity web part shows the timesheet items. To turn off this, follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Advanced permissions for the app lists
- Click on the setting icon of the Advanced Settings
- In the panel appearing, choose “Allow items from this list to appear in search results?” is No in the Search section





- Click on the Ok button