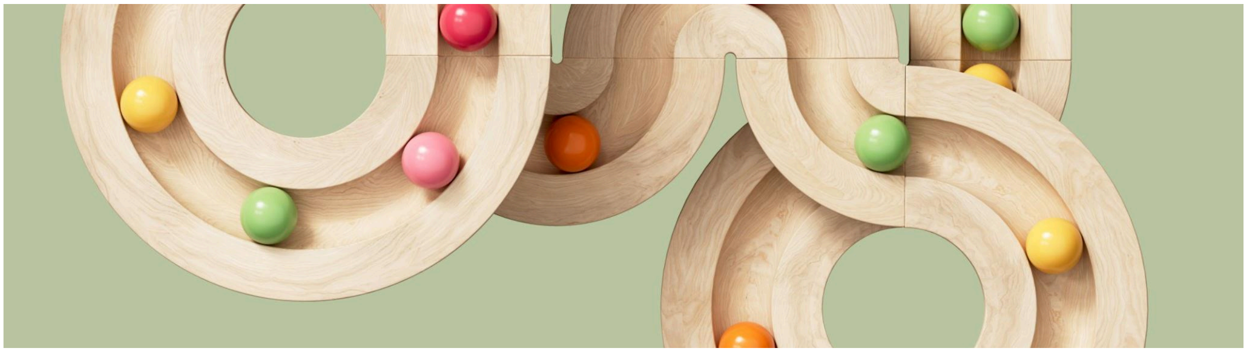


Simple Timesheet Installation Guide

Contacts:

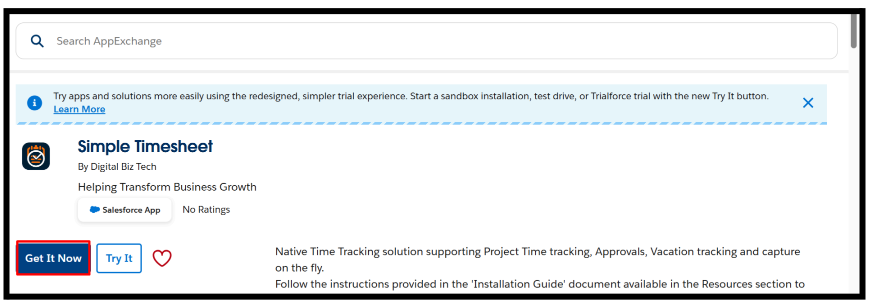
Usage Instruction

To understand how to use this Timesheet app please refer this file:
05-Usage Instructions

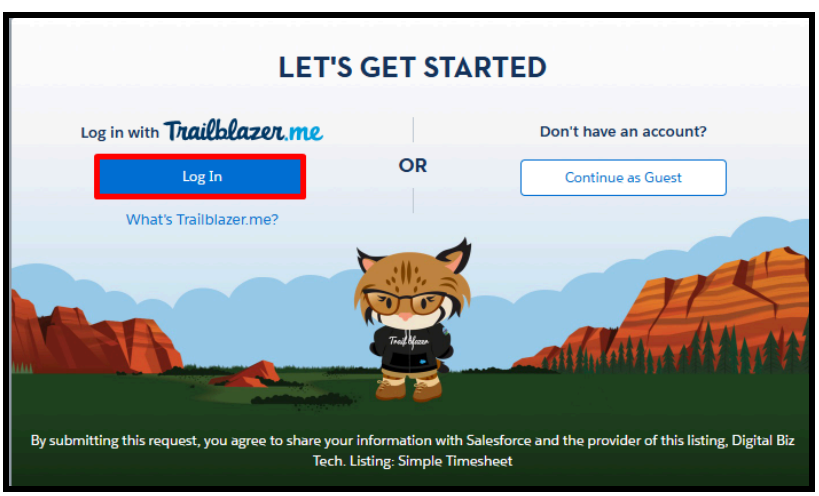
Install the App from the AppExchange

[Simple Timesheet App]

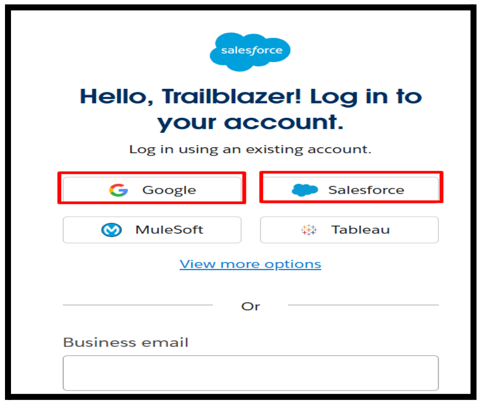
1. After clicking the above link click **Get It Now** if you want to install the app in your Production org.



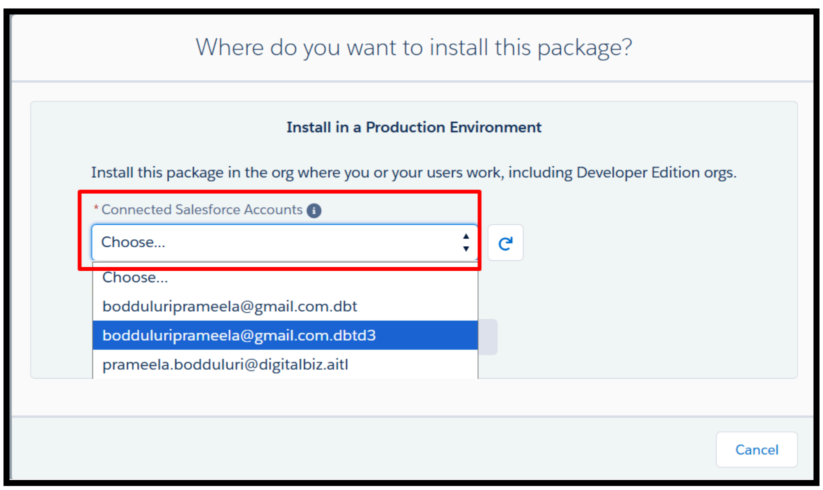
- On the next screen, click the **Log In** button.



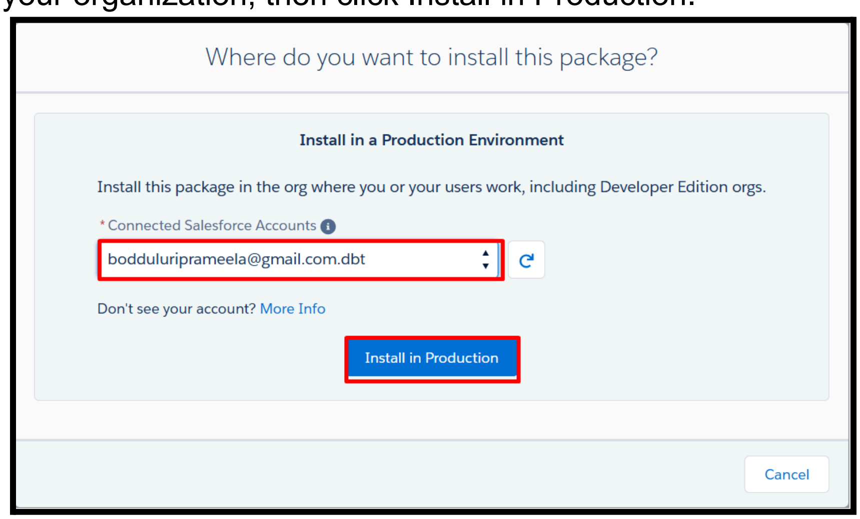
- You'll then see options to log in with **Google** or **Salesforce**.



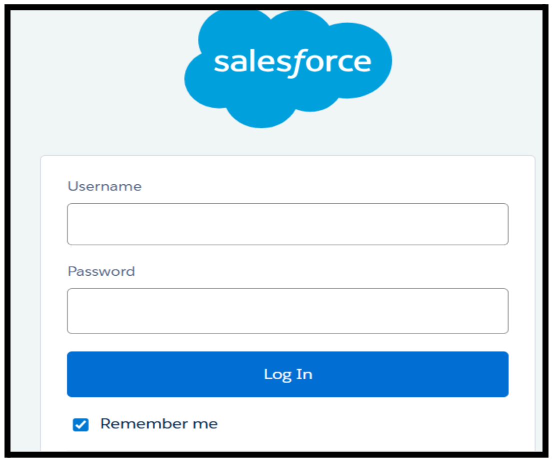
- If you choose **Google**, select the org where you want to install the app.



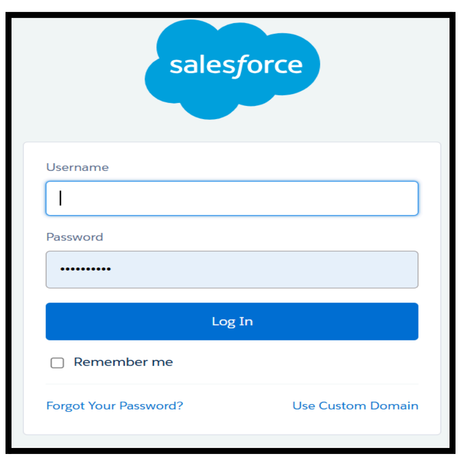
- Select your organization, then click Install in Production.



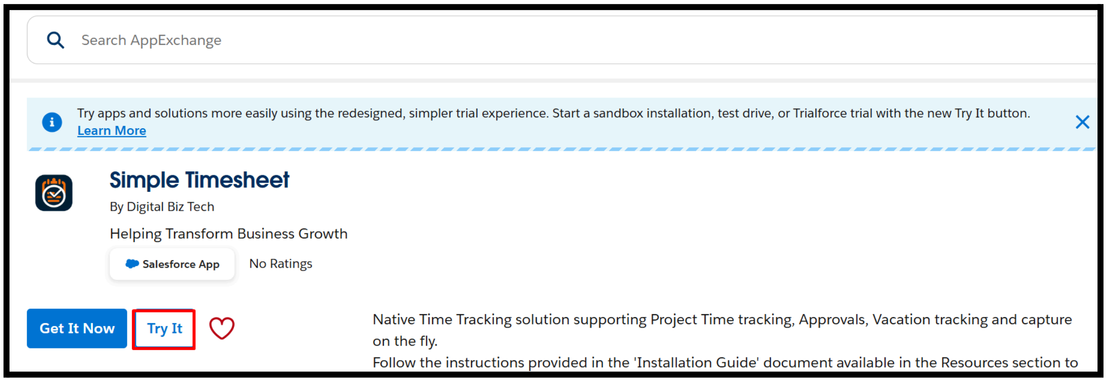
- If you choose **Salesforce**, it will open the Salesforce login page where you can log in with your credentials.



- Next, click the Confirm and Install button.

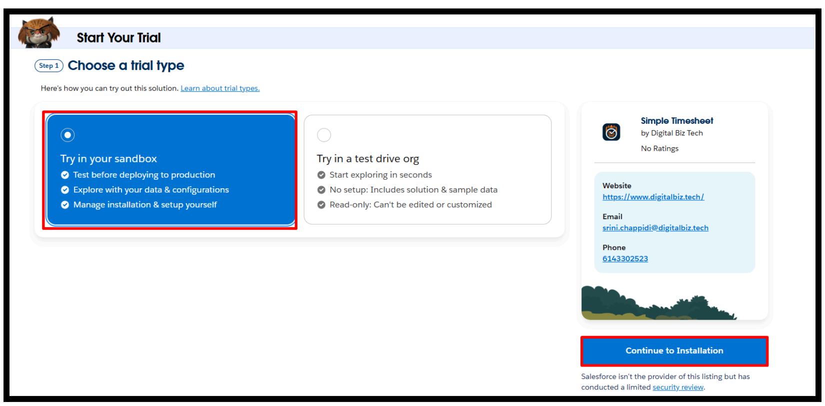


2. If you want to install the app in your Sandbox org. Click the **Try It button**.

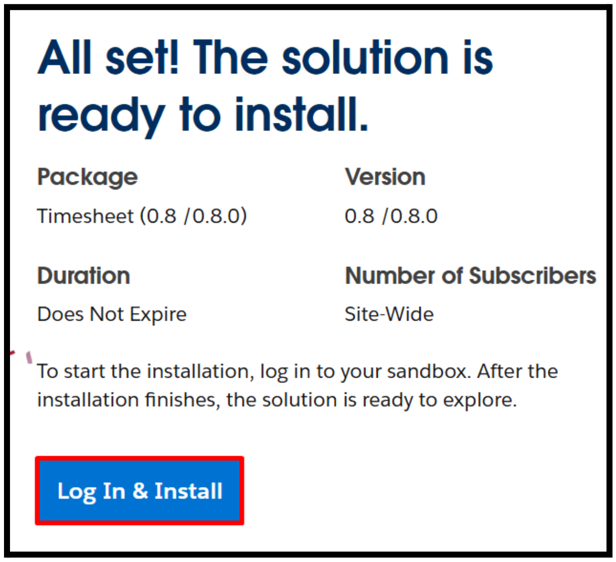


- After clicking Try It, you'll see two options:
  Try in your Sandbox
  Try in a Test Org

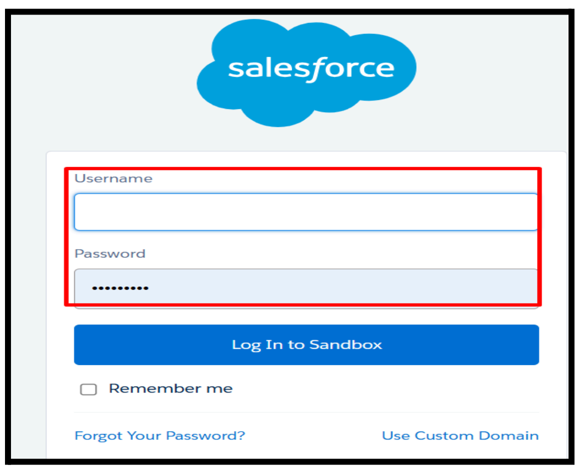
- Select Try in your Sandbox and then click Continue to Installation.



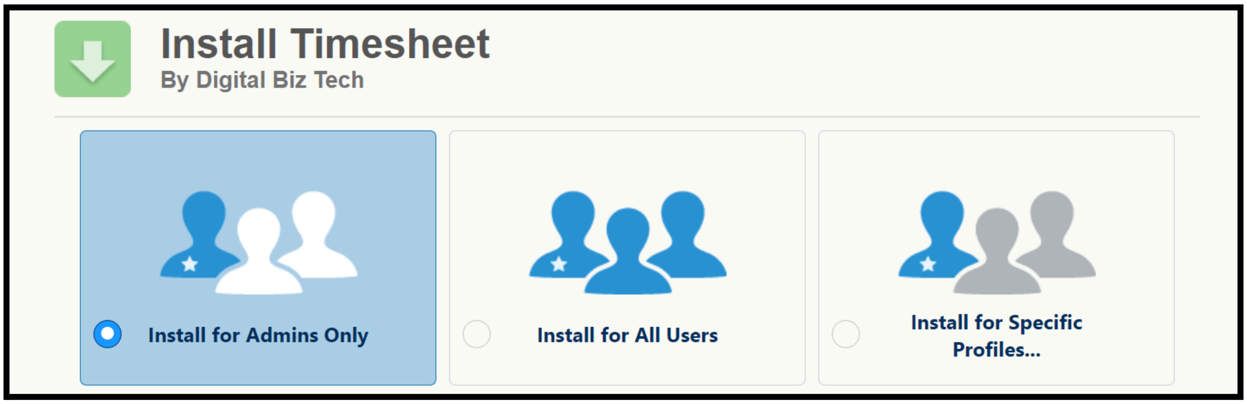
- Then, click Log In & Install.

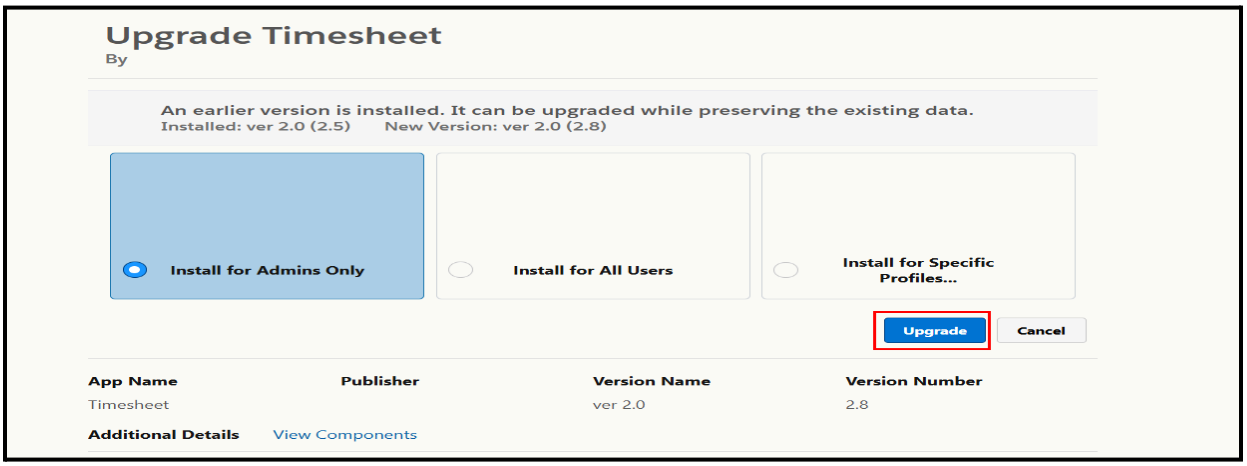


- Enter your sandbox credentials, then click Log In to Sandbox.



3. Install for Admins only.



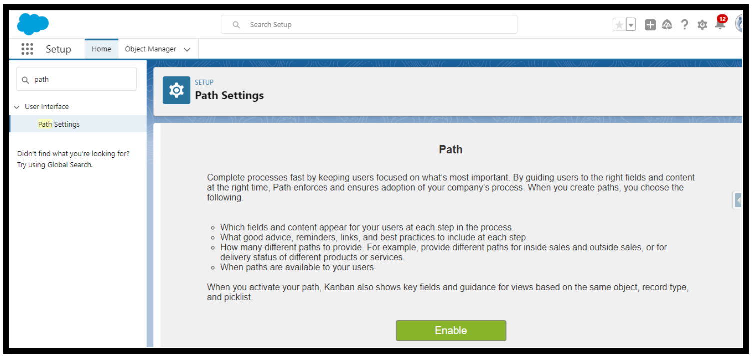


Set Up

Perform the following setup instructions after successfully installing the app.

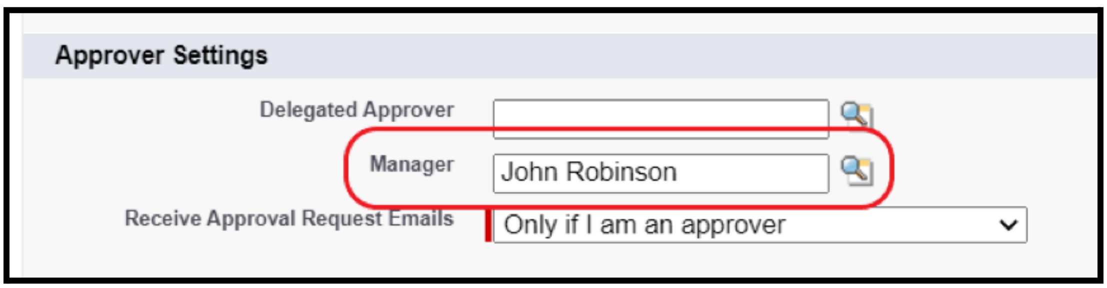
Enable Path Settings

- If not enabled already, Enable **Path Settings** in setup.

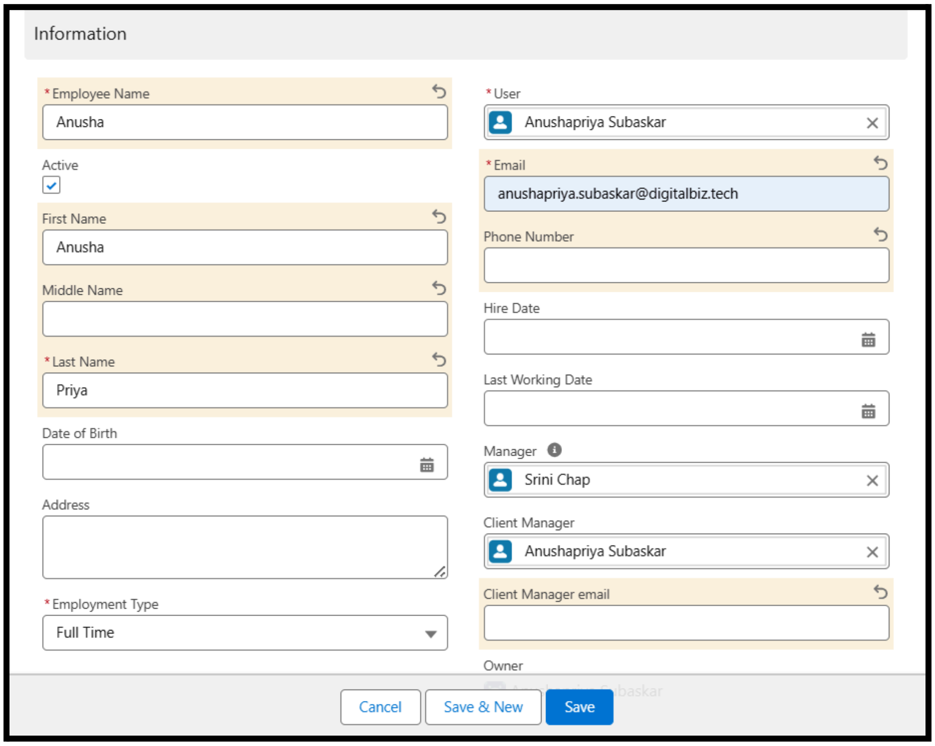


User Assignment

- Define the manager in the user record.



(**NOTE** :Validation rule will prevent the creation of Employee record If the manager is not assigned to the User.)


Information
* Employee Name
Anusha
Active
First Name
Anusha
Middle Name
* Last Name
Priya
Date of Birth
Address
* Employment Type
Full Time
* User
Anushapriya Subaskar
* Email
anushapriya.subaskar@digitalbiz.tech
Phone Number
Hire Date
Last Working Date
Manager
Srini Chap
Client Manager
Anushapriya Subaskar
Client Manager email
Owner
Cancel
Save & New
Save

Permission set Assignment

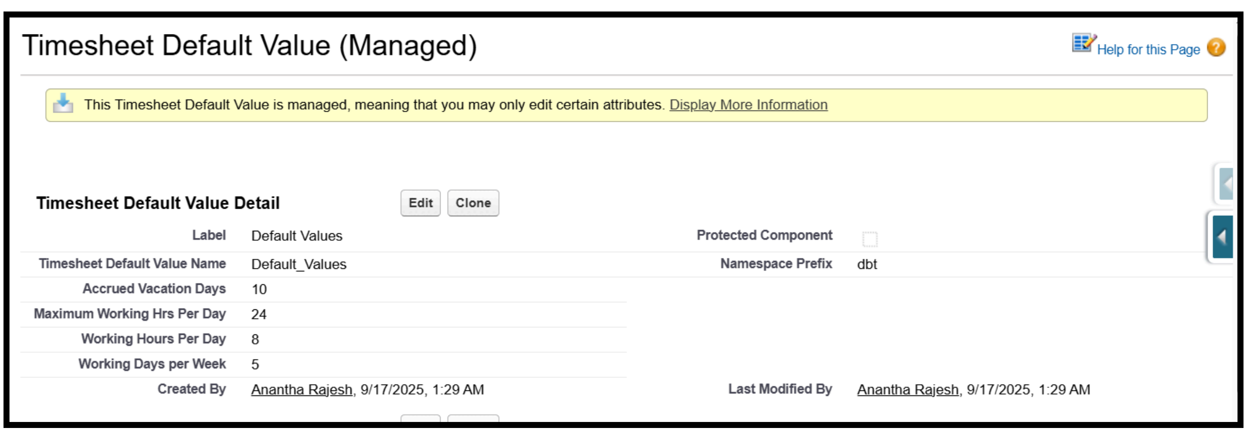
Admin has to assign the following permission sets to the respective users.

- **Timesheet User** - This will give the end user access to their Timesheet and Timesheet Line Items.
- **Timesheet Manager** - This will give the Manager access to Approve users submitted Timesheets.
- **Timesheet HR Admin** - This will give access to every component of this Application.

Change default values using Custom Metadata Type

The default values are set for Custom Metadata Types. Admin can change these values for **Working hours per day, Working Days per week,**, **Accrued Vacation days** OR **Maximum Hrs Per day** from Setup.

Custom Metadata Types >**TimeSheet Default Value > Manage Timesheet Default Values** .



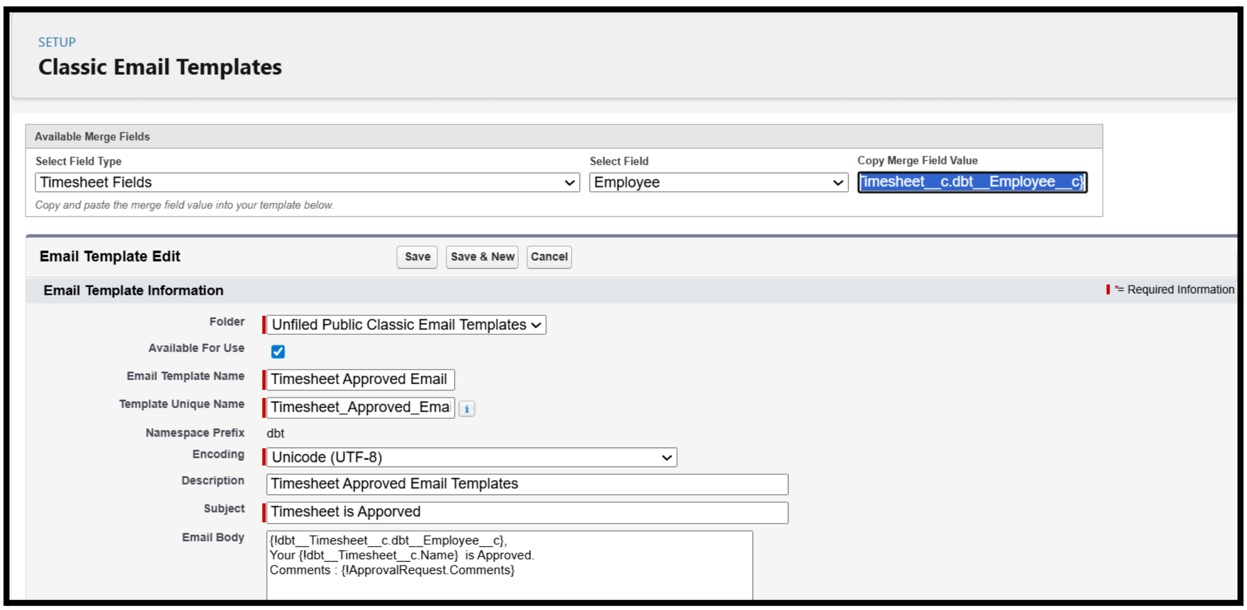
Create Email Template for Approval Process

1. In Setup, search for '**Email Templates**' and select '**Classic Email Templates**'.
2. Click on the '**new email template**' button.
3.Select the '**Unified Public Classic Email Templates**' folder, and check the '**Available for Use**' checkbox.

4. Give the approved email an appropriate name.

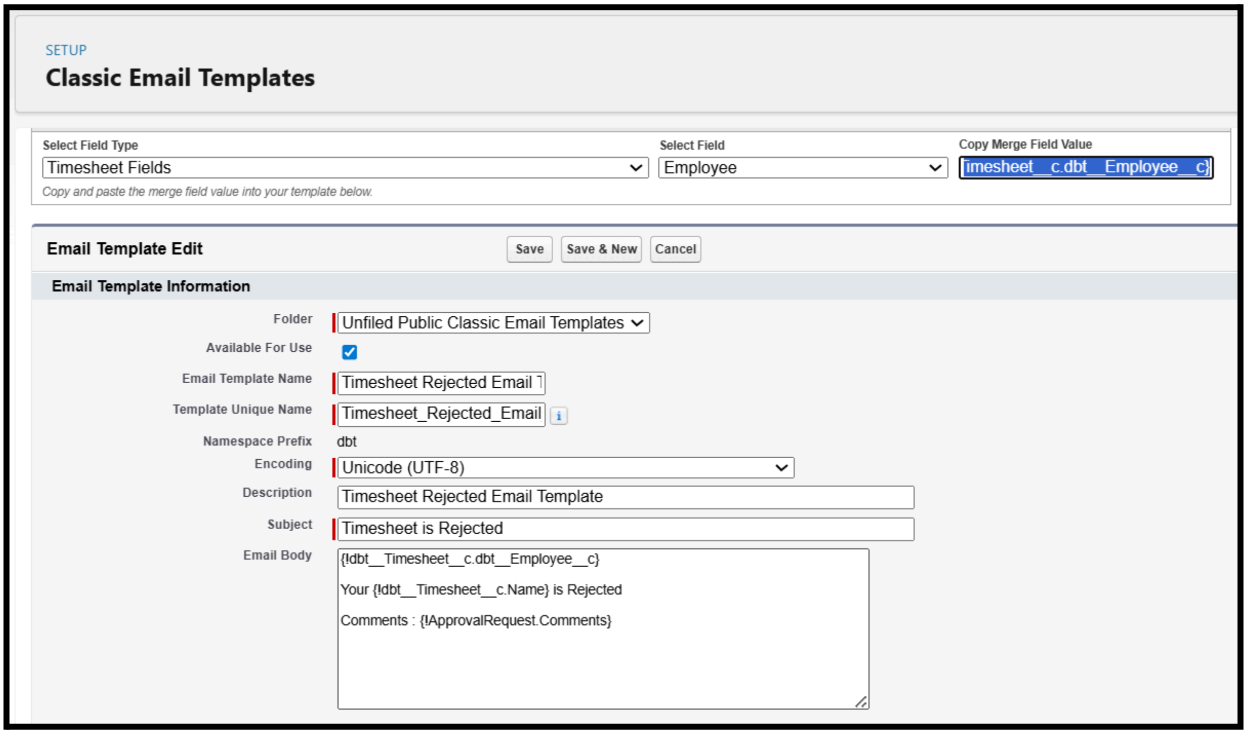
- In the email body section, enter the desired content.
- To insert timesheet-related merge fields, select ‘Timesheet Fields’ from the merge field dropdown.
- Use the search bar to find the specific field, as shown in the image below.

Email Template Name : Timesheet Approved Email Templates
Description : Timesheet Approved Email Templates
Subject : Timesheet is Approved
Body : {!dbt__Timesheet__c.dbt__Employee__c},
Your {!dbt__Timesheet__c.Name} is Approved.
Comments : {!ApprovalRequest.Comments}



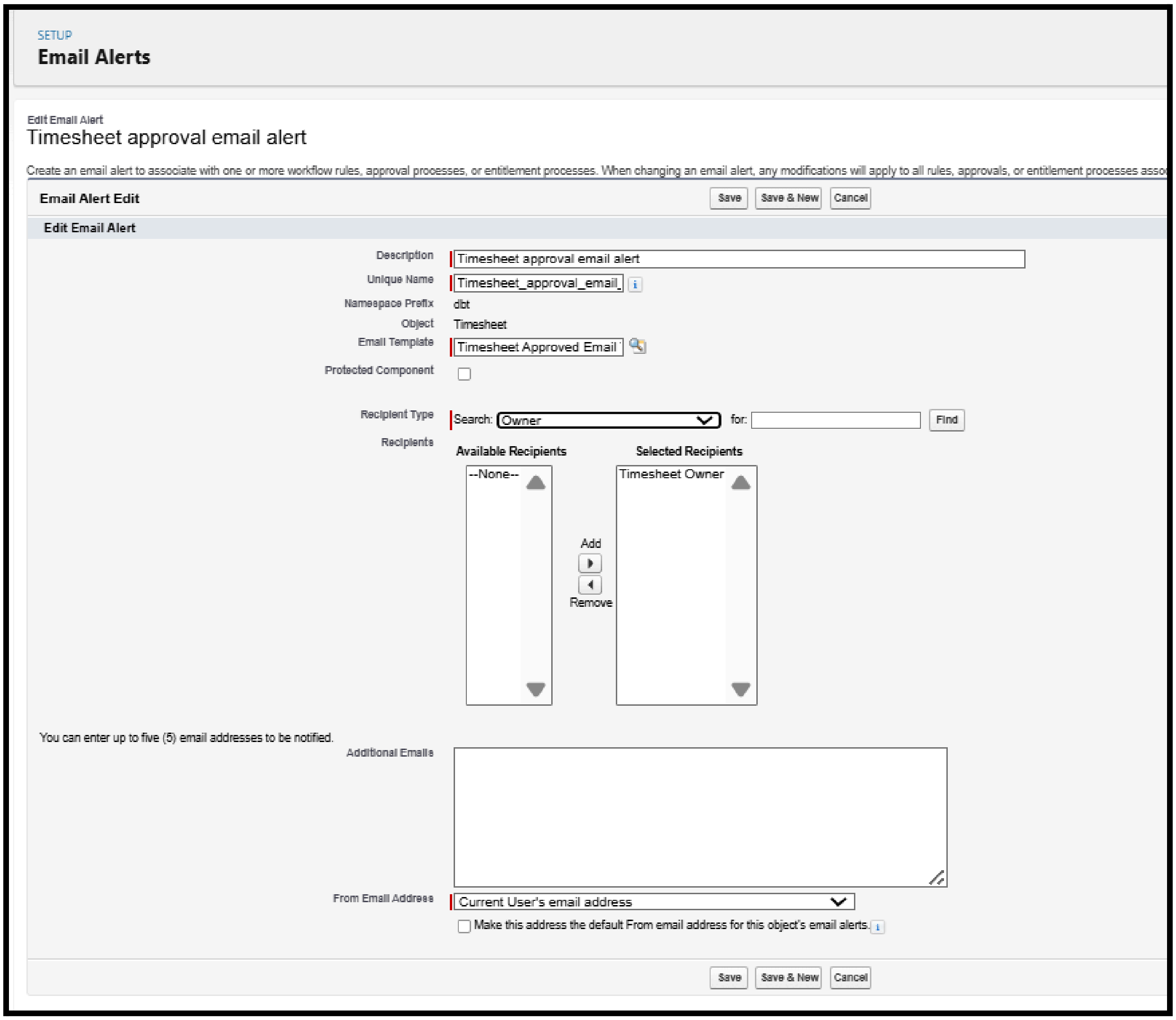
5. Similarly follow the same steps and create another email template for rejected action.

Email Template Name : Timesheet Rejected Email Templates
Description : Timesheet Rejected Email Templates
Subject : Timesheet is Rejected
Body : {!dbt__Timesheet__c.dbt__Employee__c}
Your {!dbt__Timesheet__c.Name} is Rejected
Comments : {!ApprovalRequest.Comments}

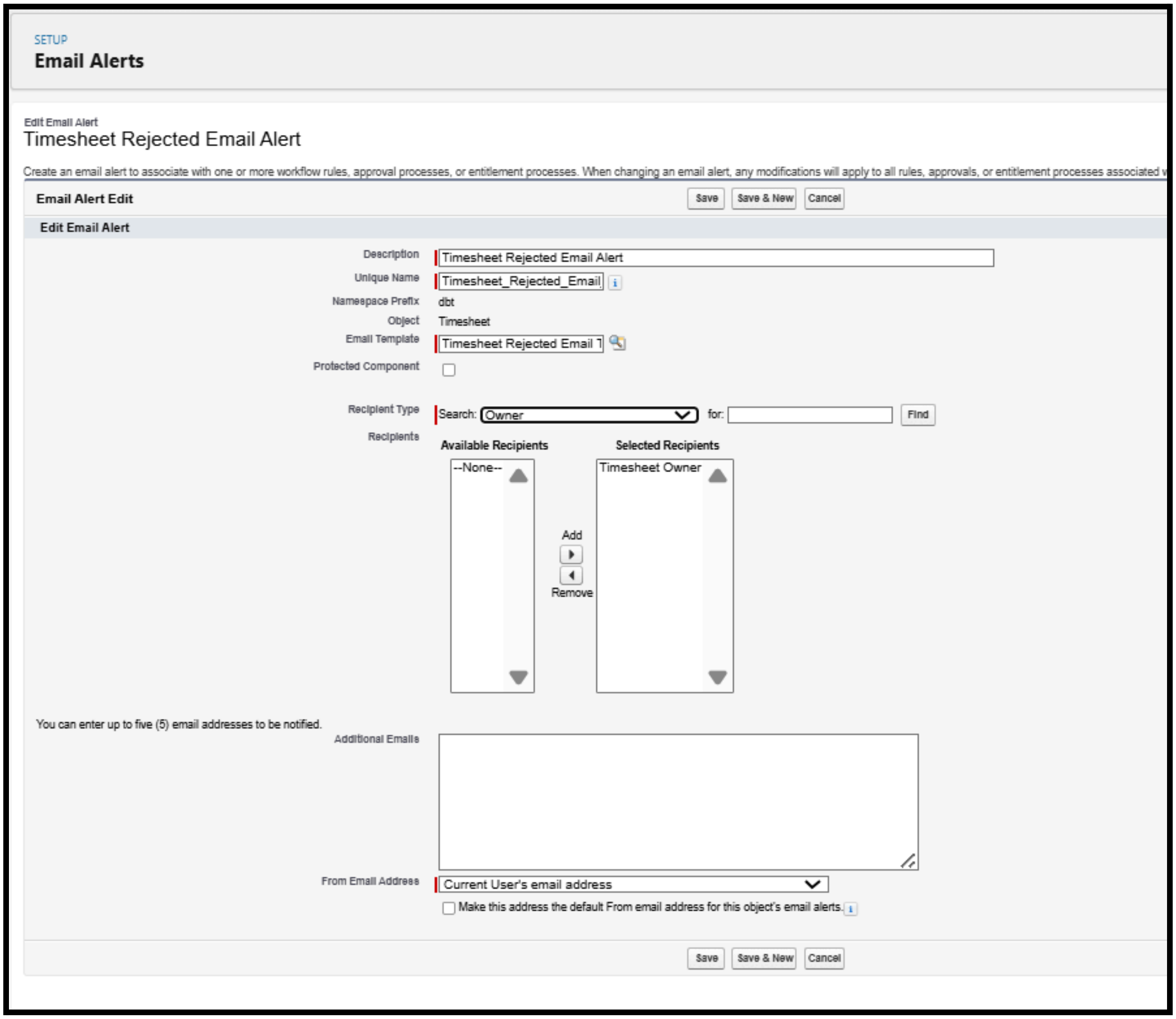


Creating Email Alerts

1. Go to the Email Alerts section from setup and click on the New Email Alert button.
2. Enter the '**Timesheet approval email alert** ' in the Description field.
3. Enter 'Timesheet_Approved_Email_Alert' in Name fields.
4. In Recipient type Search for owner and add '**Timesheet Owner**' to Selected recipients.
5. Select '**Current User's Email Address**' in From Email Address.

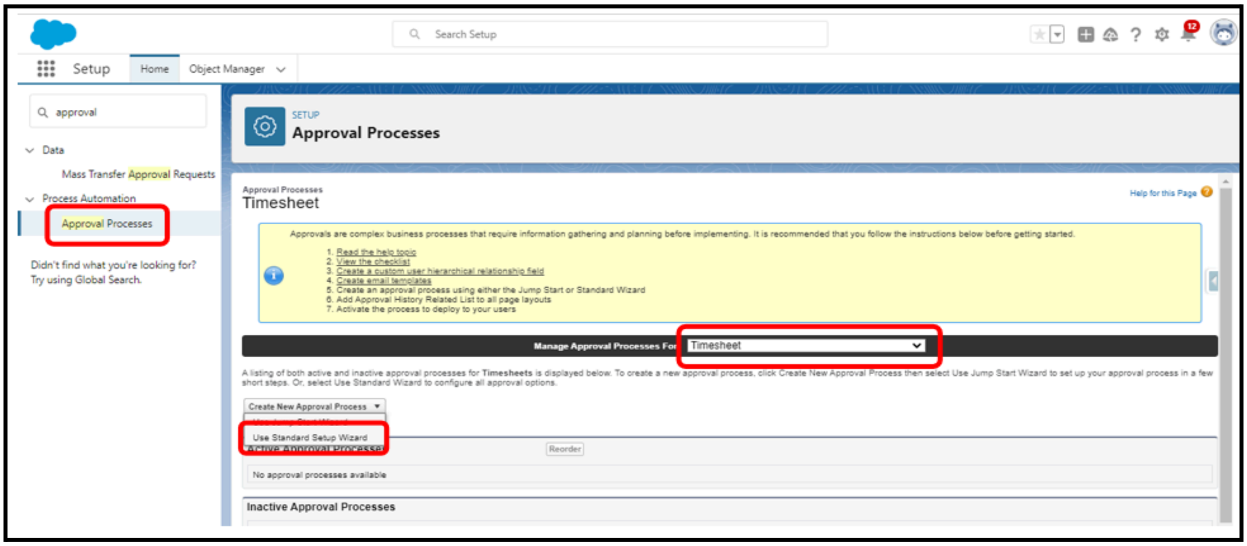


6. Follow the above steps and create another Email alert for rejection action

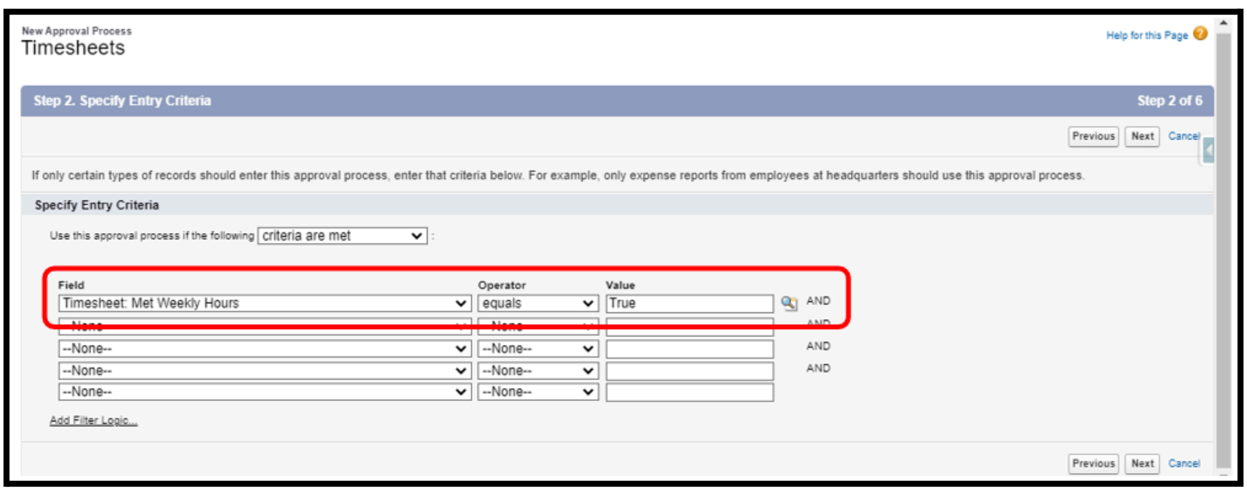


Approval Process

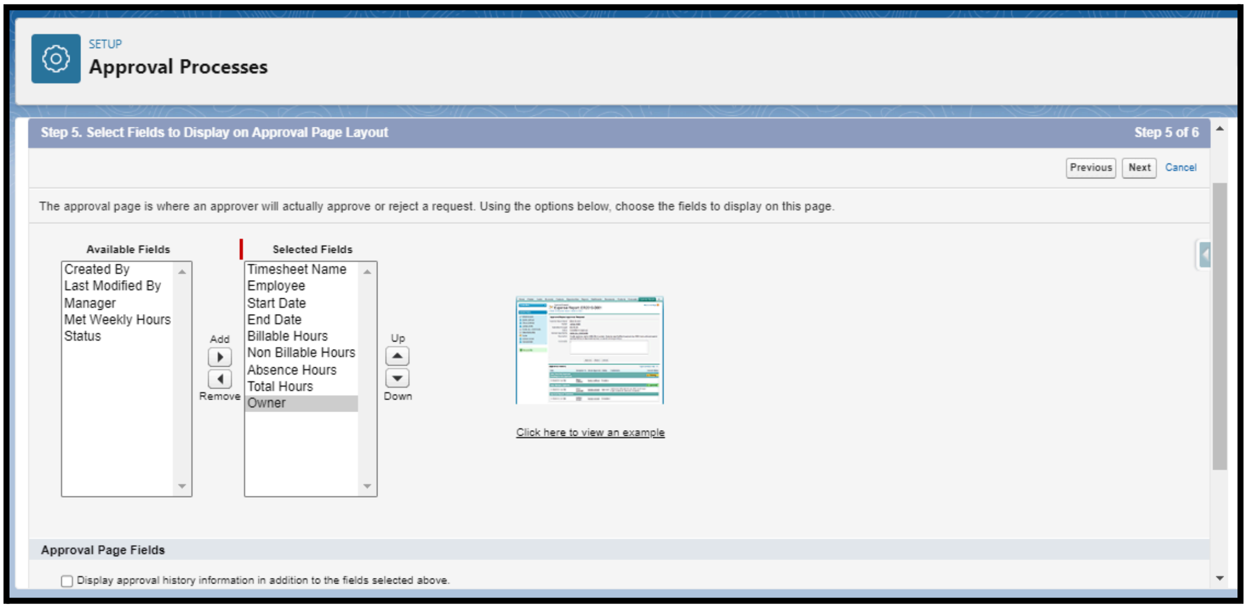
1. Click **Gear Icon**, In that Select **Setup**
2. In Quick find box, search and select “**Approval Process**”
3. Choose **Timesheet** from “Manage Approval Processes for” dropdown
4. Select “**Use Standard Setup Wizard**” from “ Create New Approval Process” dropdown



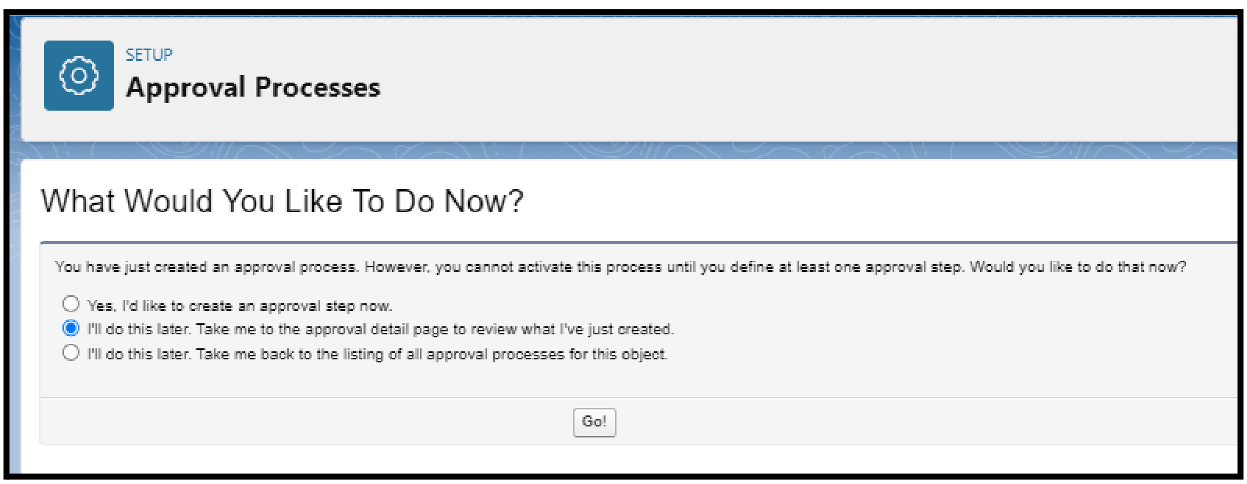
5. Name the Approval Process as “**Timesheet Approval Process**” and API Name will Auto Generate. (You are free to choose any name you prefer.)
6. Click **Next**
7. In Criteria Add “**Timesheet:Met Weekly Hours**”, Operator as “**Equal**” Value as “**True**”



8. Click Next
9. Click Next
10. Click Next
11. In step 5 add Timesheet fields in the Order as shown in below image.



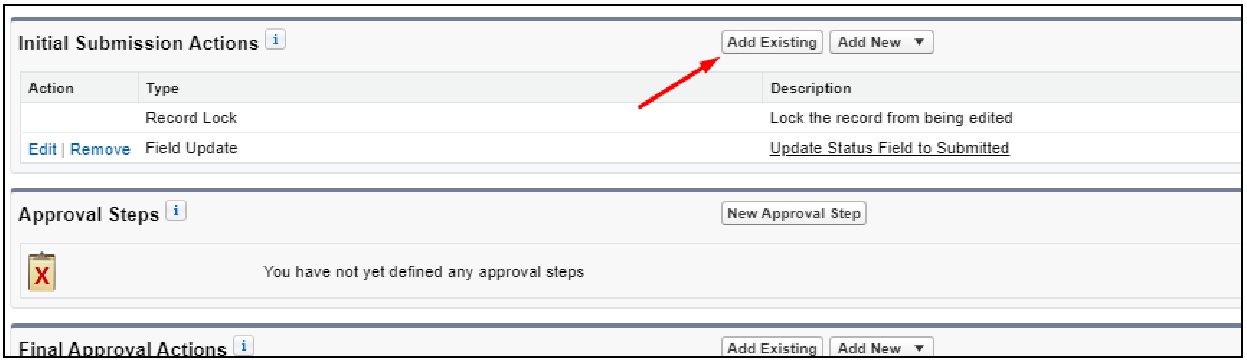
12. Click Next
13. Click Save
14. Select **"I'll do this later. Take me to the approval detail page to review what I've just created."** option Click **Go**



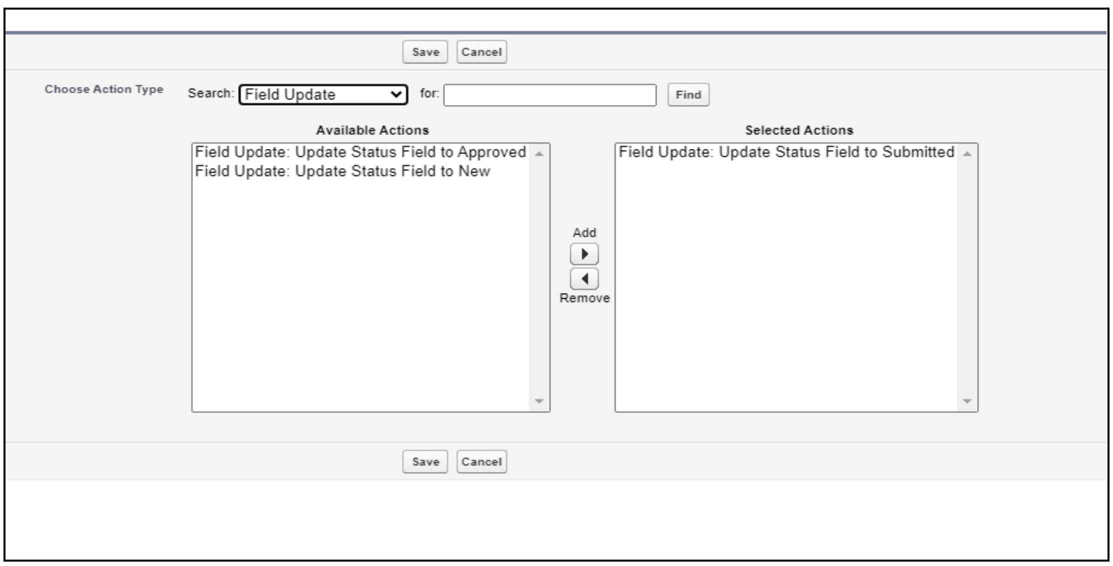
Scroll down to the "**Initial Submission Actions**" section

Add Initial Submission Actions

1. Click "**Add Existing**".



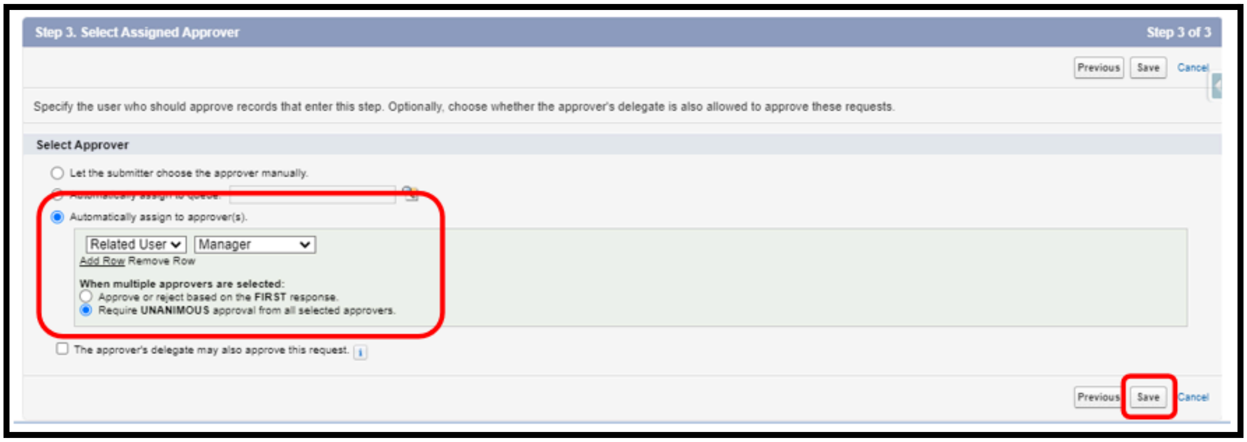
2. Select “ **Field update**” from “Choose Action Type ” Dropdown
3. Choose “**Update Status Field to Submitted**” from the available actions and add to “**Selected Actions**”
4. Click **Save.**



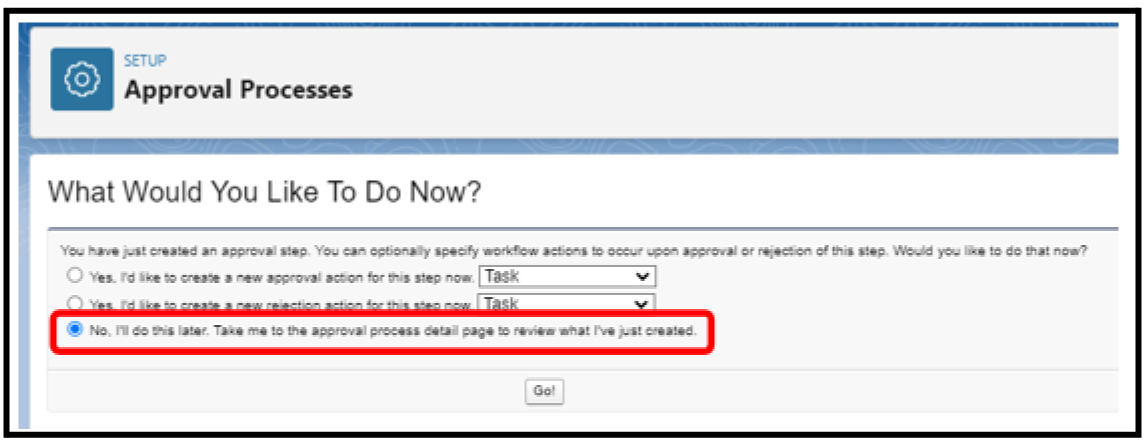
Approval Steps

1. Select “**New Approval Step**” button
2. Enter Name as “**Manager Approval**” (Unique name will auto generated based on the name)
3. Click **Next**.
4. In **Step 2** Select “**All records should enter this step**”
5. Click **Next**
6. Select “**Automatically assign to approver(s).**”
7. Select “**Related user**” and Add “**Manager**”.

8. Select “**Require UNANIMOUS approval from all selected approvers.**”
9. Click **Save**

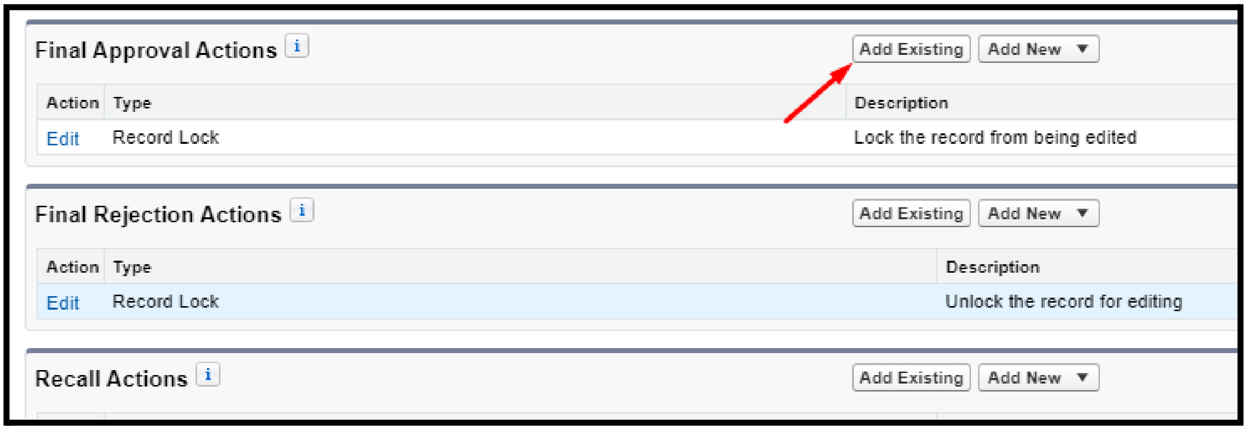


10. Select “**No I’ll do this later. take me to approval process page to review what I” ve just created** ”
11. Click “**Go**”

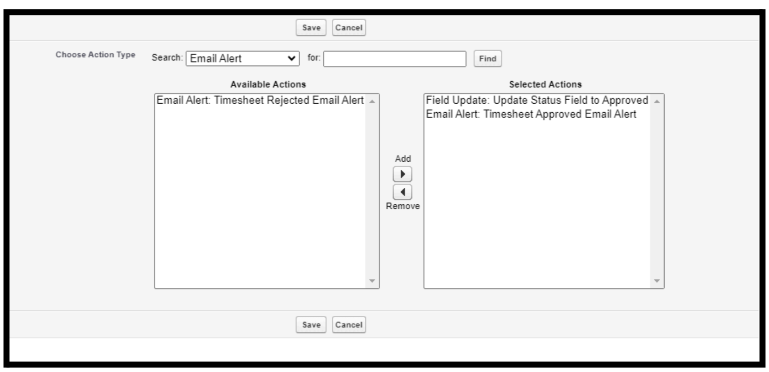


Add Final Approval Actions

1. Click “**Add Existing**”.



2. Select " **Field update**" from "Choose Action Type " Dropdown
3. Choose "**Update Status Field to Approved**" from the available actions and add to "**Selected Actions**"
4. Select " **Email Alert**" from "Choose Action Type " Dropdown
5. Choose "**Timesheet Approved Email Alert**" from the available actions and add to "**Selected Actions**"
6. Click **Save.**



Add Final Rejection Actions

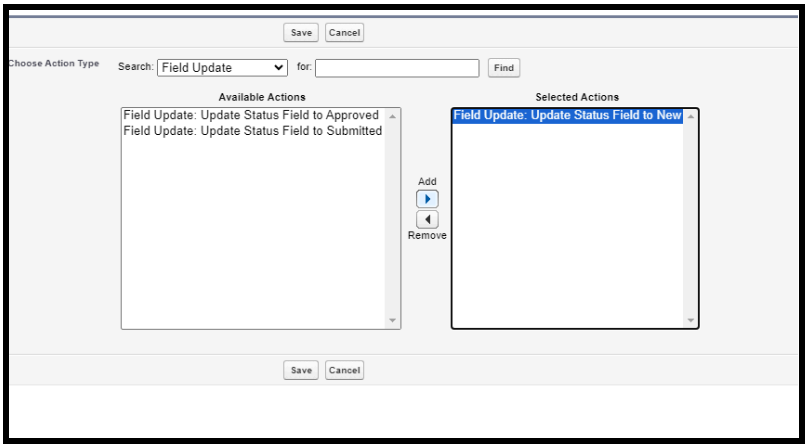
1. Click "**Add Existing**".

2. Select “ **Field update**” from “Choose Action Type ” Dropdown
3. Choose “**Update Status Field to New**” from the available actions and add to “**Selected Actions**”
4. Select “ **Email Alert**” from “Choose Action Type ” Dropdown
5. Choose “**Timesheet Rejected Email Alert**” from the available actions and add to “**Selected Actions**”
6. Click **Save.**

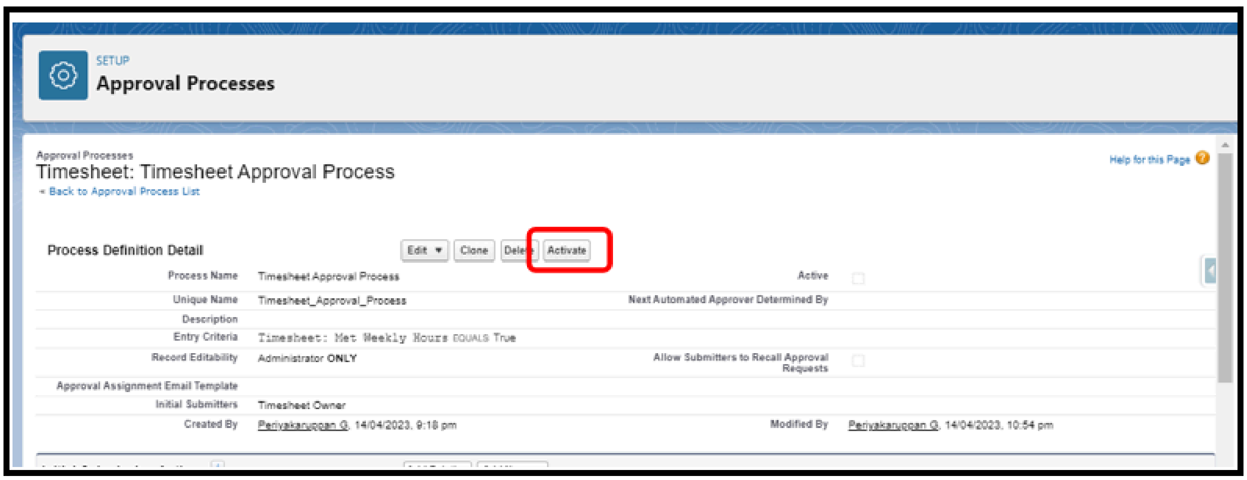
Add Recall Actions

1. Click “**Add Existing**”.

2. Select “ **Field update**” from “Choose Action Type ” Dropdown
3. Choose “**Update Status Field to New**” from the available actions and add to “**Selected Actions**”
4. Click **Save.**



5. **Activate** the Approval Process



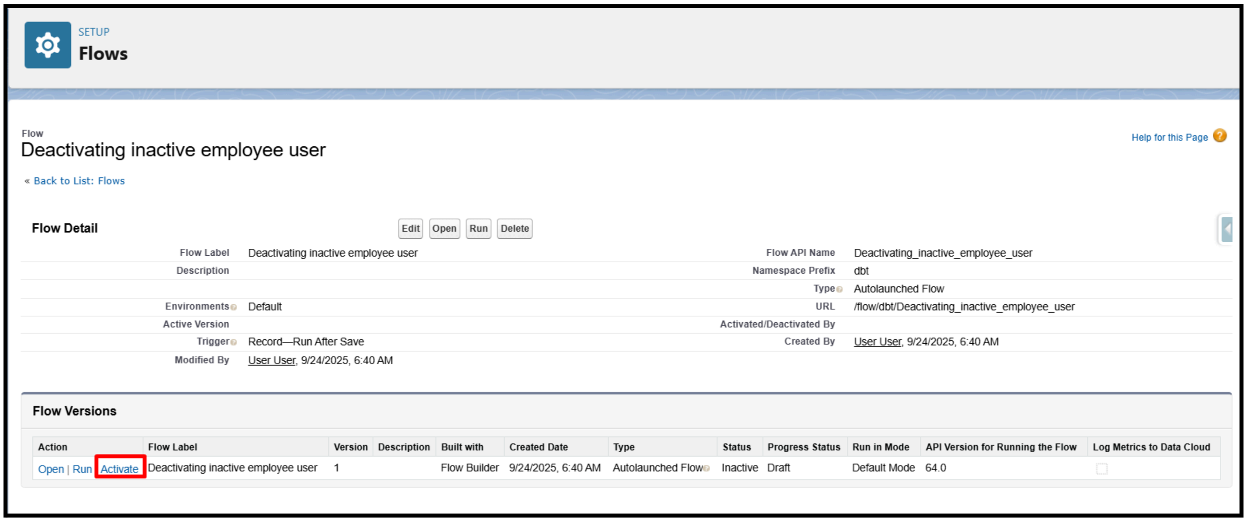
Deactivating inactive employee user Flow

When an employee is deactivated, this flow can automatically inactivate their associated user. However, if the user is part of a group or has certain settings, the flow may fail, causing errors and potentially sending multiple flow error emails to the org's default email address.

By **default**, the Deactivating inactive employee user Flow is **inactive** as we don't want to modify any Standard record data without consent.

If you want to **enable** this functionality, you can activate the flow by navigating to:
Setup → Flows → [Deactivating inactive employee user Flow] → Edit → Activate

Additionally, assign the Admin Email permission set to specific users who should receive notifications about which users need to be manually deactivated.

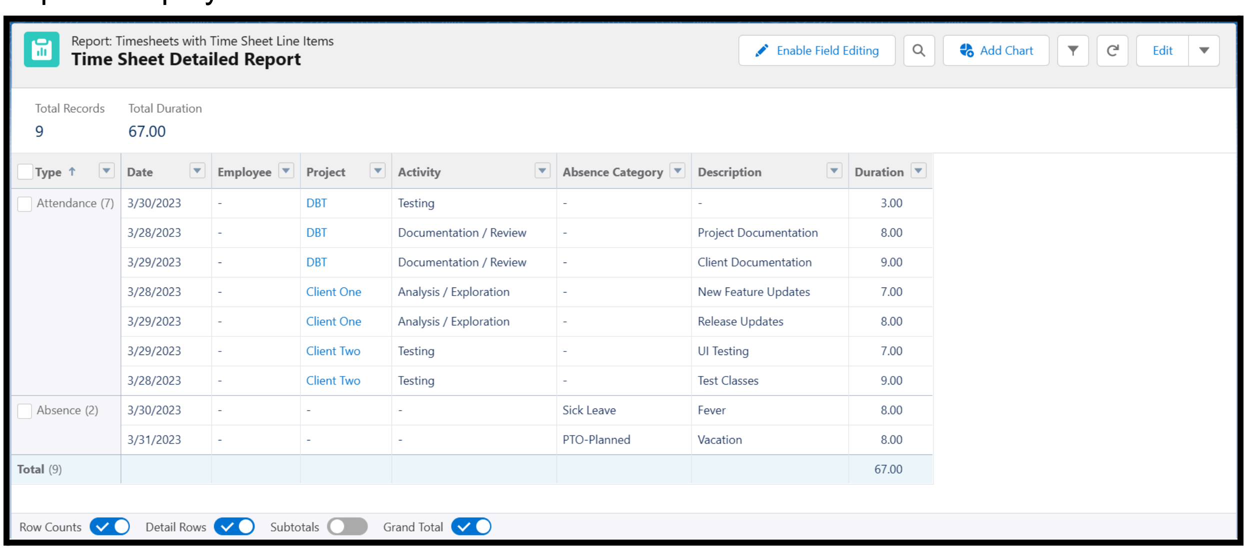


Managerial Reporting

Reports

Reports give detailed information on the employees working hours and the number of hours an employee has spent on a specific project based on the filter criteria used in the reports.

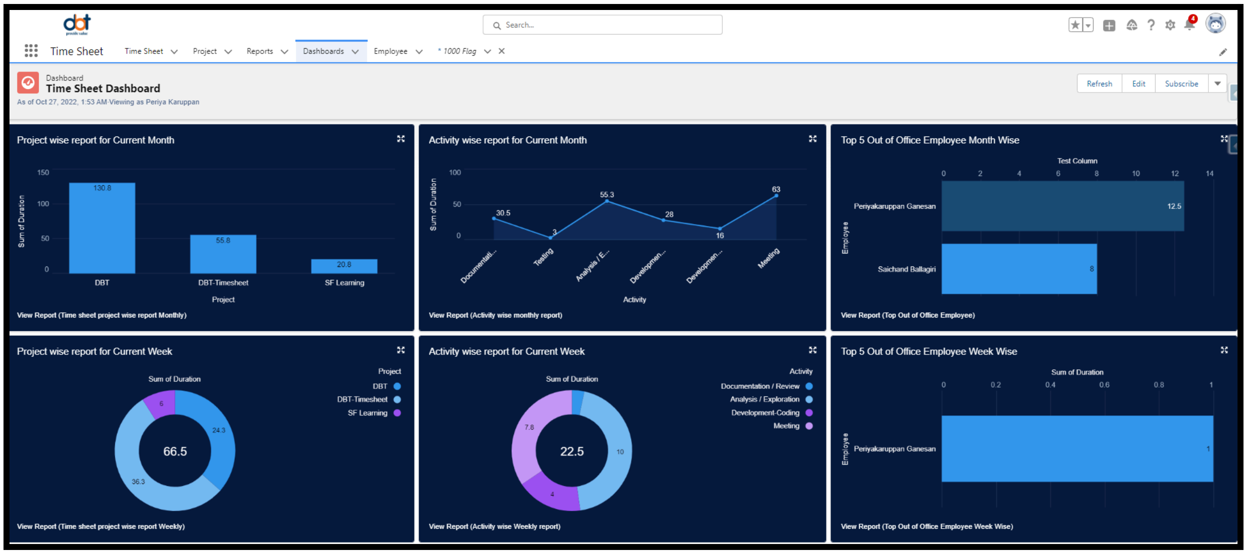
Reports display data in tabular format.



Type	Date	Employee	Project	Activity	Absence Category	Description	Duration
Attendance (7)	3/30/2023	-	DBT	Testing	-	-	3.00
	3/28/2023	-	DBT	Documentation / Review	-	Project Documentation	8.00
	3/29/2023	-	DBT	Documentation / Review	-	Client Documentation	9.00
	3/28/2023	-	Client One	Analysis / Exploration	-	New Feature Updates	7.00
	3/29/2023	-	Client One	Analysis / Exploration	-	Release Updates	8.00
	3/29/2023	-	Client Two	Testing	-	UI Testing	7.00
	3/28/2023	-	Client Two	Testing	-	Test Classes	9.00
Absence (2)	3/30/2023	-	-	-	Sick Leave	Fever	8.00
	3/31/2023	-	-	-	PTO-Planned	Vacation	8.00
Total (9)							67.00

DashBoard

Using the data from reports, Dashboards can display the data graphically.



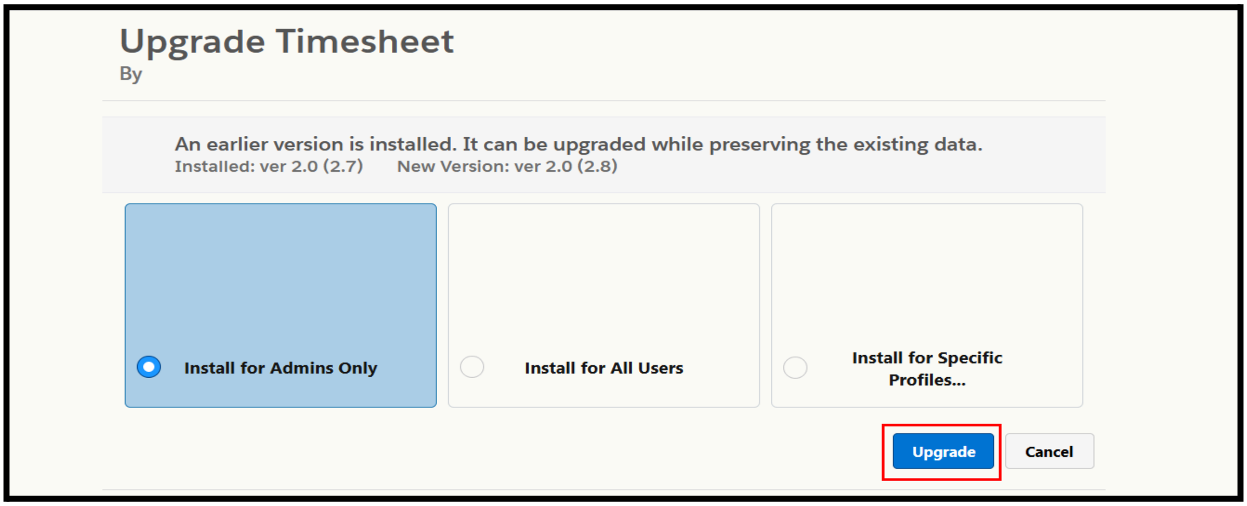
NOTE:-

This Application is designed on the basis of role hierarchy, It will work flawlessly if your organization is already using roles. If not create at least 3 roles, Employee, Manager and HR Admin.

Steps to Upgrade the Timesheet App

Upgrading the Timesheet App

- Follow the same procedures as **Step 1** and **Step 2** of the initial installation.
- In **Step 3**, Salesforce will recognize the existing installation. Click the **Upgrade** button to continue.



On Upgrade

If you've upgraded the Timesheet app from AppExchange, there's more manual steps required.

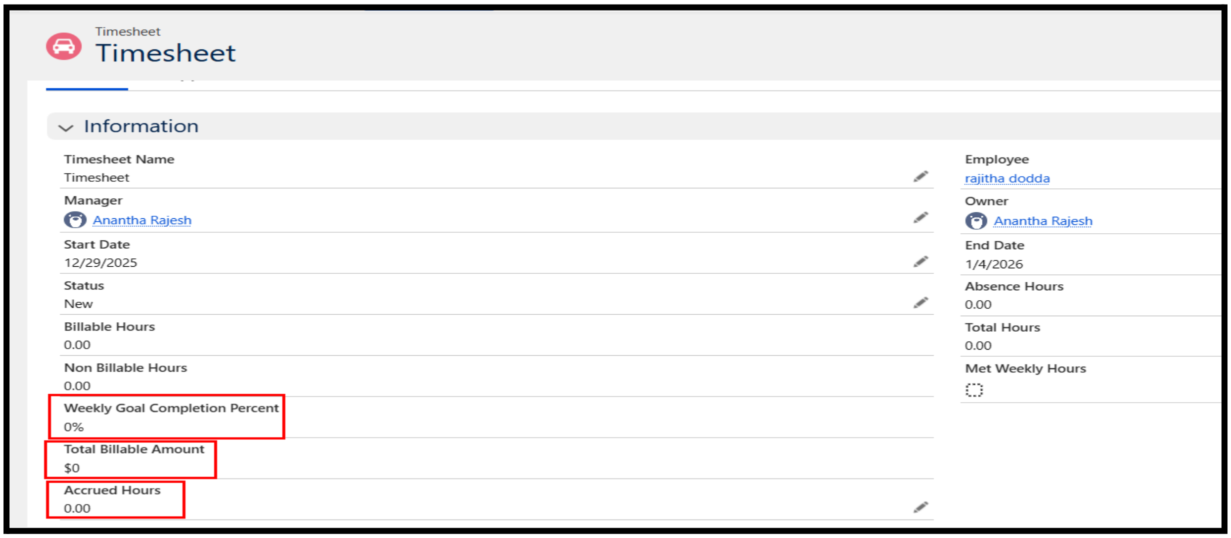
Manual Layout Updates

Upgrades do not automatically add new fields to existing page layouts. If the following fields are missing, they must be added manually.

Timesheet Layout

Add Missing Fields: Weekly Goal Completion Percent, Total Billable Amount, and Accrued Hours.

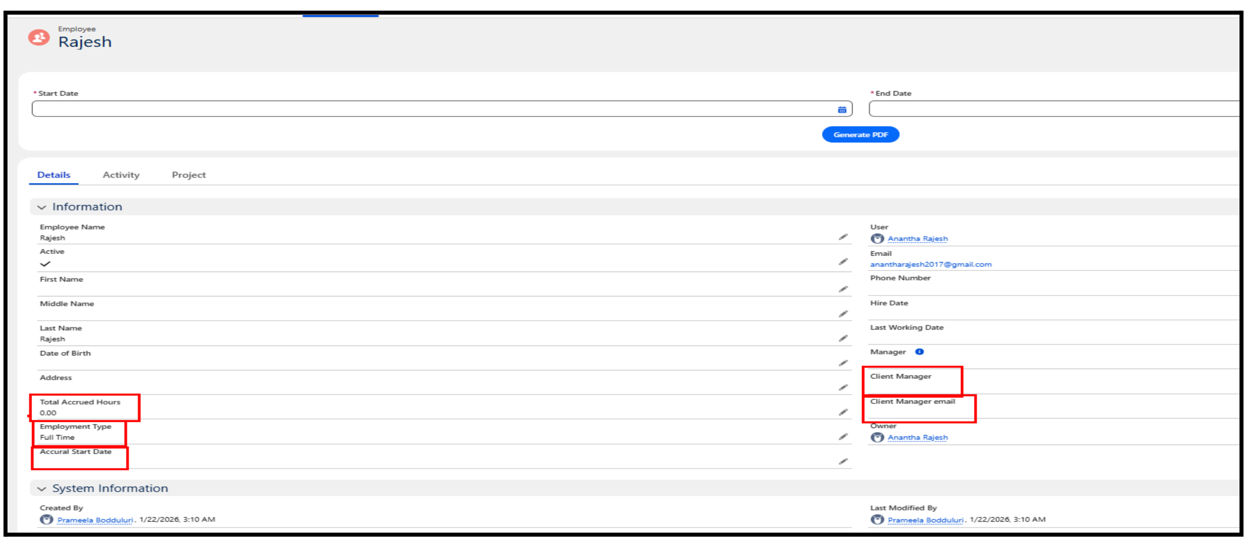
Field Requirements: Manually set Employee, Manager, Start Date, and End Date as Required fields.



Employee Layout

Add Missing Fields: Employment Type, Client Manager, and Client Manager Email.

Note: Employee Name is now formatted as First Name + Last Name



For Old Employee Records:

- After adding those fields to the page layouts, the Employment Type field shows no value.

- We can manually set the desired value (e.g., Full-time, Part-time, or Internship).
- Only after setting the Manager field, the Client Manager and Client Manager Email fields will be updated automatically.

For new employee records: The Employment Type field is set to Full-time by default.

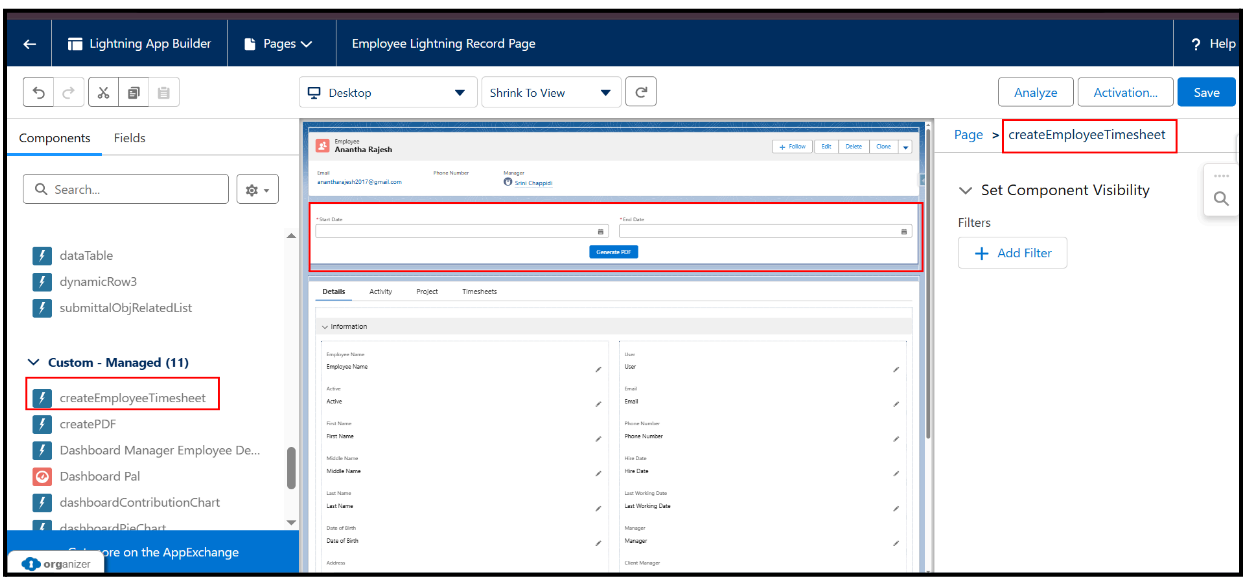
Employee Record page Layout :

1. Open any **Employee record** in Salesforce.

2. Click the **gear icon (top right)** → choose **Edit Page**.

3. In the Lightning App Builder, select **createEmployeeTimesheet** in the components section**.**

4.Drag & drop **createEmployeeTimesheet** under the employee name .

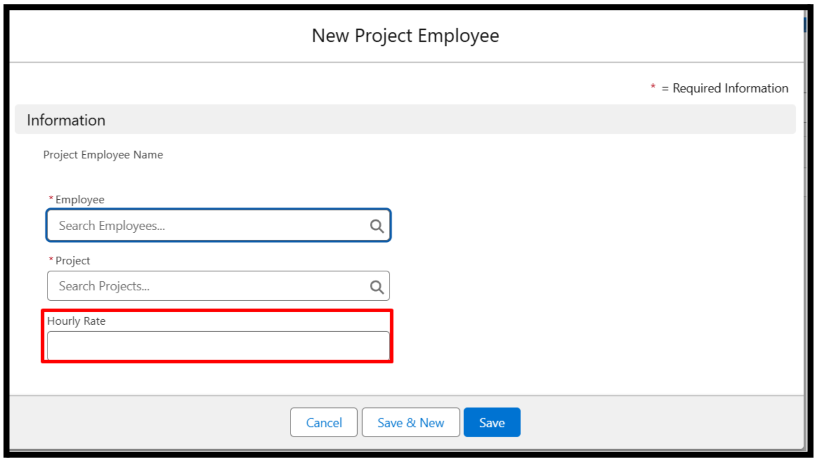


5.Click **Save** & **Activation** → set as Org Default.

6.Go back to the record and confirm the **Generated PDF** is showing.

Project Employee Layout :

After upgrading to the new version in your org, if the '**Hourly Rate**' field is not visible, you'll need to manually add it to the page layouts.

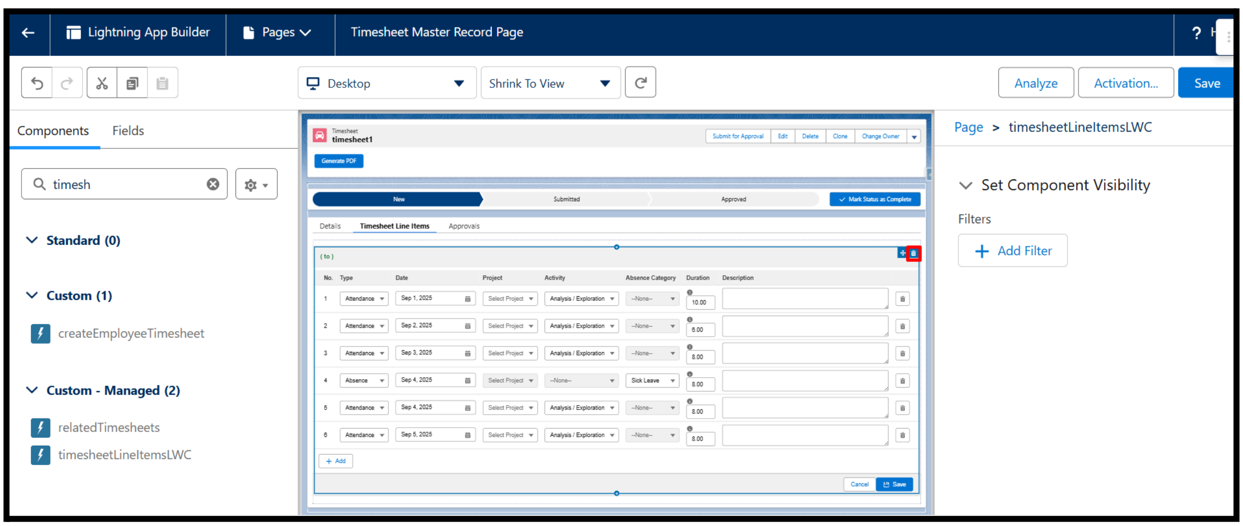


Timesheet Record Page Layout :

1. Open any **Timesheet Master record** in Salesforce.

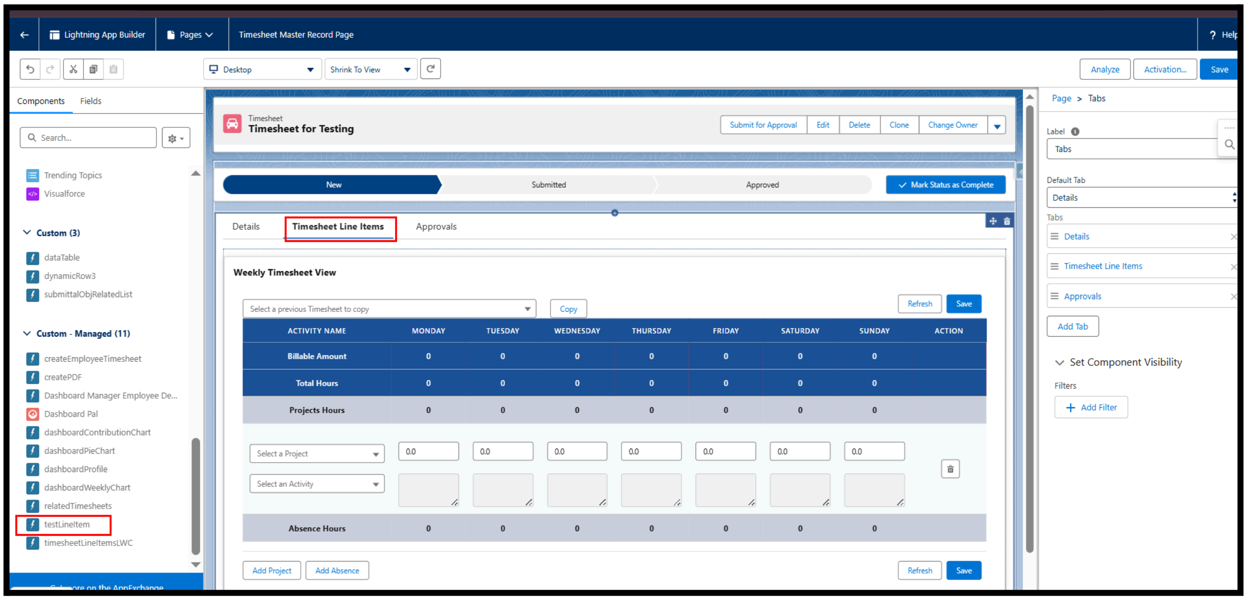
2. Click the **gear icon (top right)** → choose **Edit Page**.

3. In the Lightning App Builder, select and delete **timesheetLineItemLWC.**

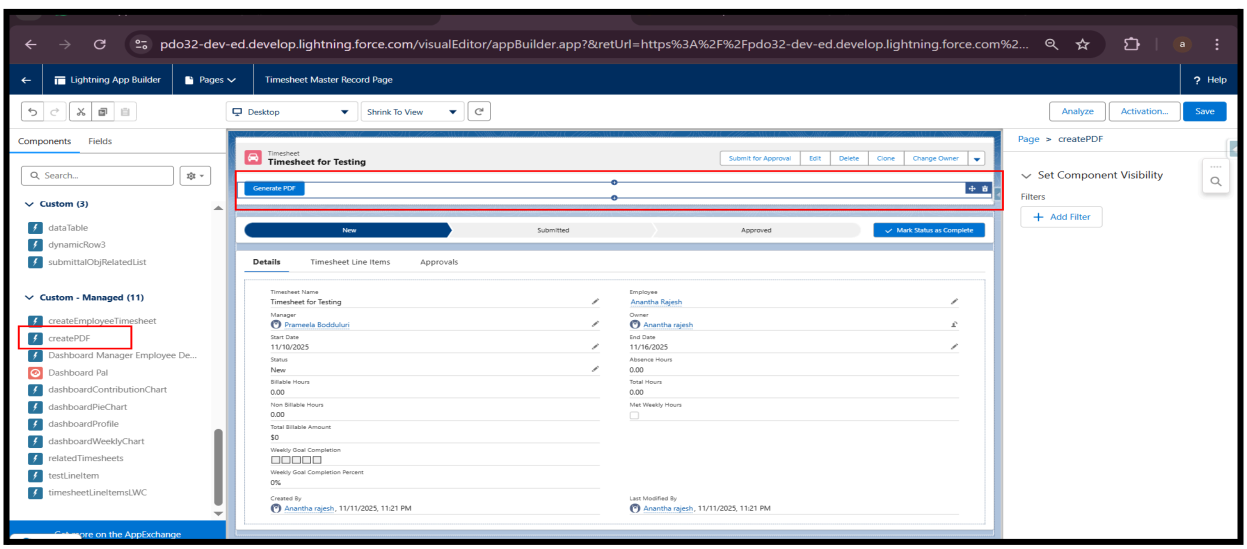


4. On the left, search for **testLineItem** under Custom components.

5. Drag & drop **testLineItem** into the same place (Timesheet Line Items tab).



6. Drag & drop **CreatePDF** under the Timesheet name.



7.Click **Save** & **Activation** → set as Org Default.

8.Go back to the record and confirm the **new testLineItem** and **Generate PDF** is showing.

Recalculation of Accrual Hours for old Timesheet data

For the employees , you want to calculate the Accrual Hours. Put the Accrual Start date (From this date the total Accrual hours will get calculated) and Accrual Divisor.
Total Accrual Hours on Employee = SUM (Timesheets Billable Hours / Accrual Divisor) .

After the fields are updated, You can run this script from Setup -> Developer Console -> Asynchronous Execute and paste the below lines and run.

```
dbt.TimesheetAccrualBatch batch = new dbt.TimesheetAccrualBatch();

Database.executeBatch(batch, 200);
```

Uninstall Instructions

- Before uninstalling Admin has to deactivate Flows which are active for this Application.
- We need to remove the permission sets related to this app that were assigned to users.
- The Admin has to make sure that no timesheets are in the Approval Process. Deactivate the Approval Process and then delete it.
- After the Approval Process is deactivated and deleted, the Timesheet app can be uninstalled like any other app exchange app.

Contacts:

If faced any issue please contact

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