

User Manual for CV TMS



Table of Contents

User Manual for CV TMS	1
1. Introduction	4
2. User Roles	5
2.1 Admin	5
2.2 Project Coordinator	6
2.3 Manager	6
2.4 Normal User (Employee).....	6
3. Navigation for Non-Admin	7
4. Dashboard for Non-Admin.....	7
4.1 Dashboard Filter	7
4.2 Summary Cards	8
4.3 Work Hours Chart	8
4.4 Active Projects	8
5. Timesheet Management.....	9
5.1 Timesheet Filters.....	9
5.2 Adding a Timesheet	10
6. Admin Navigation	12
7. Dashboard (Admin).....	13
8. Timesheet (Admin).....	14
9. Project Management (Admin Only).....	15
9.1 Creating a Project.....	16
9.2 Project Status Options.....	17
9.3 Project Members.....	17
10. Task Categories (Admin Only)	18
11. Holidays (Admin Only).....	19
12. Settings (Admin Only)	20
12.1 Users	20
12.2 Notifications	21



12.3 Email Templates.....	22
12.4 General Settings.....	23
13. System Limitations – Free Version.....	25



1. Introduction

CV TMS is a **SharePoint-based Timesheet Management System** that helps organizations track employee work hours across different projects.

The system allows employees to log their daily work activities while enabling managers and administrators to monitor project progress and time utilization.

CV TMS provides a centralized platform where teams can manage projects, track logged hours, and generate reports efficiently.



2. User Roles

The system supports four user roles.

- Admin (Full control) (Manage Systems controls)
- Project coordinator (Can access all employee logs)
- Manager (Track/manage assigned employee logs)
- Normal User (Maintain own logs)

Timesheet Visibility by Role

Different roles can view different sets of timesheet records.

Role	Visibility
Admin	Can view timesheets of all users
Project Coordinator	Can view timesheets of all employees
Manager	Can view timesheets of assigned employees
Normal User	Can view only their own timesheets

2.1 Admin

Admin users have full control over the system and can manage all modules and configurations.

Admin users can:

- Manage projects
- Manage task categories
- Manage holidays
- View all employee timesheets
- Configure system settings
- Export system data



2.2 Project Coordinator

Project Coordinators are responsible for monitoring employee work logs across projects.

They can:

- View dashboard data
- View all employee timesheets
- Add and manage their own timesheets
- Export timesheet data

2.3 Manager

Managers can monitor the work logs of employees assigned to their projects.

Managers can:

- View dashboard data
- View timesheets of assigned employees
- Add and manage their own timesheets
- Export timesheet data

2.4 Normal User (Employee)

Normal users primarily use the system to record their daily work hours.

They can:

- Access the dashboard
- Add timesheets
- Edit their own timesheets
- Delete their own timesheets
- Export their timesheet data

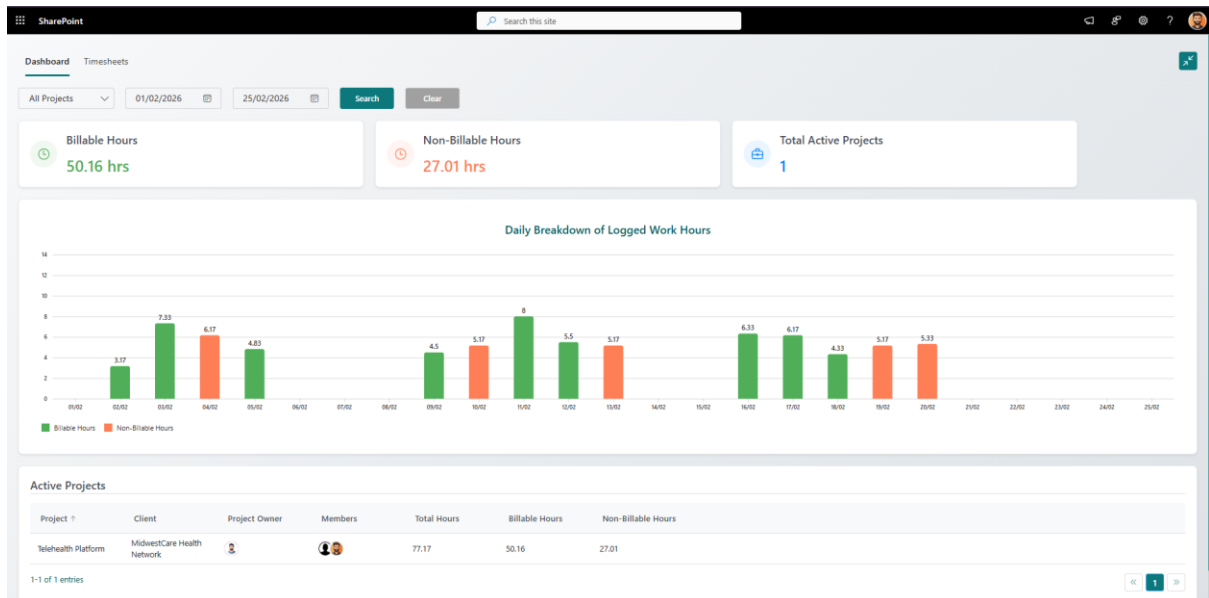


3. Navigation for Non-Admin

The navigation menu for Project Coordinators, Managers, and Normal Users contains the following modules:

- Dashboard
- Timesheet

4. Dashboard for Non-Admin



The Dashboard provides a quick overview of timesheet records and allows users to search and filter their work logs.

4.1 Dashboard Filter

User can search and filter timesheet records directly from the dashboard using different filters options based on projects and date wise.



4.2 Summary Cards

The dashboard displays key information through summary cards:

- **Billable Hours** – Total hours logged for billable work.
- **Non-Billable Hours** – Total hours logged for internal or non-billable tasks.
- **Total Active Projects** – Number of active projects in the system.

4.3 Work Hours Chart

A Daily Breakdown of Logged Work Hours chart displays employee logged hours as categorized by billable and non-billable per day. This helps Admin to quickly understand work trends and project activity.

4.4 Active Projects

The **Active Projects** table provides a quick summary of projects, including project name, client, members, total hours, billable hours, and non-billable hours.



5. Timesheet Management

The screenshot shows a SharePoint 'Timesheets' dashboard. At the top, there are filters for 'All Projects', 'All Log Types', and a user selection 'Angela Cor...'. A date range is set from '01/02/2026' to '25/03/2026'. Summary statistics show: Total Hours: 77.17, Billable Hours: 50.16, Non-billable Hours: 27.01, and Total Projects: 1. A table below lists 14 entries, with the first 10 visible. Each entry includes a date, user name (Angela Cornish), description, project (Telehealth Platform), log type (Billable or Non-billable), task category, total hour, and actions (edit/delete).

Date	User Name	Description	Project	Log Type	Task Category	Total Hour	Actions
20/02/2026	Angela Cornish	Wrote backend unit tests for authentication and appointment modules.	Telehealth Platform	Non-billable	Testing	5:20	[Edit] [Delete]
19/02/2026	Angela Cornish	Implemented Redux state management for authentication and patient data handling.	Telehealth Platform	Non-billable	Testing	5:10	[Edit] [Delete]
18/02/2026	Angela Cornish	Integrated secure video consultation interface with session validation.	Telehealth Platform	Billable	Development	4:20	[Edit] [Delete]
17/02/2026	Angela Cornish	Built patient and doctor dashboards with appointment overview and medical record access.	Telehealth Platform	Billable	Development	6:10	[Edit] [Delete]
16/02/2026	Angela Cornish	Developed responsive login, registration, and MFA verification screens using React & Tailwind.	Telehealth Platform	Billable	Development	6:20	[Edit] [Delete]
13/02/2026	Angela Cornish	Implemented password hashing, token expiration policies, and audit logging middlewares.	Telehealth Platform	Non-billable	Design	5:10	[Edit] [Delete]
12/02/2026	Angela Cornish	Configured PostgreSQL database and implemented indexing for optimized queries.	Telehealth Platform	Billable	Development	5:30	[Edit] [Delete]
11/02/2026	Angela Cornish	Integrated Twilio API for secure telehealth video consultations.	Telehealth Platform	Billable	Development	8:00	[Edit] [Delete]
10/02/2026	Angela Cornish	Implemented patient record management APIs with secure validation and access restrictions.	Telehealth Platform	Non-billable	Design	5:10	[Edit] [Delete]
09/02/2026	Angela Cornish	Developed authentication APIs with JWT and multi-factor authentication logic.	Telehealth Platform	Billable	Development	4:30	[Edit] [Delete]

The Timesheet module allows users to record their daily work activities. Each timesheet entry represents the time spent on a specific project task.

Users can create, edit, or delete their own timesheet entries.

5.1 Timesheet Filters

The Timesheet page provides filtering options that allow users to quickly locate specific records. Users can filter timesheets based on Client, Project, Log Type, User Name, and Date Range.

The behaviour of the **User Name** filter depends on the role as below:

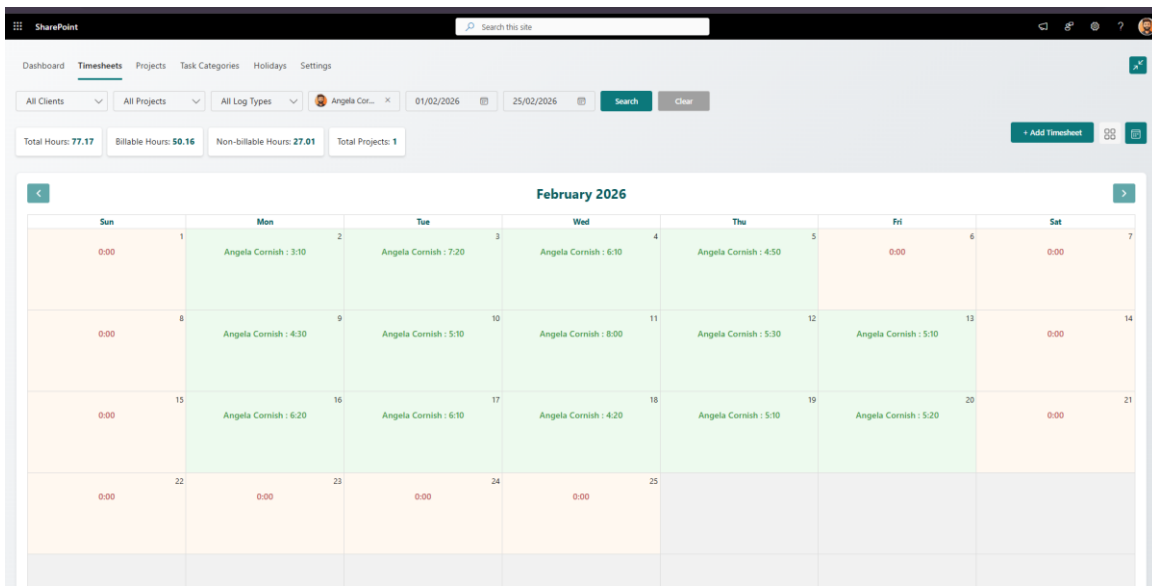
- **Admin** can search timesheets for any user.
- **Project Coordinators** can view logs of all employees.
- **Managers** can view logs of employees assigned to them through projects.
- **Normal Users** can view only their own timesheet records.



Export Feature:

- All users can export timesheet records using the **Export to Excel** option.
- The exported file contains the data currently displayed based on the selected filters.
- This allows users to generate reports for a specific date range, project, or client.

There are 2 views of Timesheet that are Grid View and Calander View



5.2 Adding a Timesheet

Date	User Name	Description	Project	Log Type	Task Category	Total Hour	Actions
20/02/2026	Angela Cornish	Wrote backend unit tests for authentication and appointment modules.	Telehealth Platform	Non-billable	Testing	5:20	[Edit] [Delete]
18/02/2026	Angela Cornish	Implemented Redux state management for authentication and patient data handling.	Telehealth Platform	Non-billable	Testing	5:10	[Edit] [Delete]
18/02/2026	Angela Cornish	Integrated secure video consultation interface with session validation.	Telehealth Platform	Billable	Development	4:20	[Edit] [Delete]
17/02/2026	Angela Cornish	Built patient and doctor dashboards with appointment overview and medical record access.	Telehealth Platform	Billable	Development	6:10	[Edit] [Delete]
16/02/2026	Angela Cornish	Developed responsive login, registration, and MFA verification screens using React & Tailwind.	Telehealth Platform	Billable	Development	6:20	[Edit] [Delete]
13/02/2026	Angela Cornish	Implemented password hashing, token expiration policies, and audit logging middleware.	Telehealth Platform	Non-Billable	Design	5:10	[Edit] [Delete]
12/02/2026	Angela Cornish	Configured PostgreSQL database and implemented indexing for optimized queries.	Telehealth Platform	Billable	Development	5:30	[Edit] [Delete]
11/02/2026	Angela Cornish	Integrated Twilio API for secure telehealth video consultations.	Telehealth Platform	Billable	Development	8:00	[Edit] [Delete]
10/02/2026	Angela Cornish	Implemented patient record management APIs with secure validation and access restrictions.	Telehealth Platform	Non-billable	Design	5:10	[Edit] [Delete]
08/02/2026	Angela Cornish	Developed authentication APIs with JWT and multi-factor authentication logic.	Telehealth Platform	Billable	Development	4:30	[Edit] [Delete]

Add TimeSheet

Date: 6/3/2026 | User Name: Angela Cornish

Project: Select Project | Log Type: Non-Billable

Task Category: Select Task Category | Hour: Select Hour

Minute: Select Minute

Description: Enter Description

Submit Cancel



Users can create a new timesheet by clicking the “+ Add Timesheet” button, which opens a form panel to enter the required work details. The system ensures that users can only log time for projects where they are assigned as a Project Member.

Once submitted, the timesheet appears in the Timesheet table, where users can view all their entries. Each record can be Updated by Edit action or removed by Delete action

Note: A user must be assigned to a manager in Microsoft 365 Admin Center. If a manager is not assigned to the user, the system will not allow the user to add a timesheet entry.

Refer below steps to check manager is assigned or not to user in Microsoft 365 Admin Center.

- Go to: <https://admin.microsoft.com>
- Go to Users → Active users
- Select the user
- Check Manager is provided or not under Account section



6. Admin Navigation

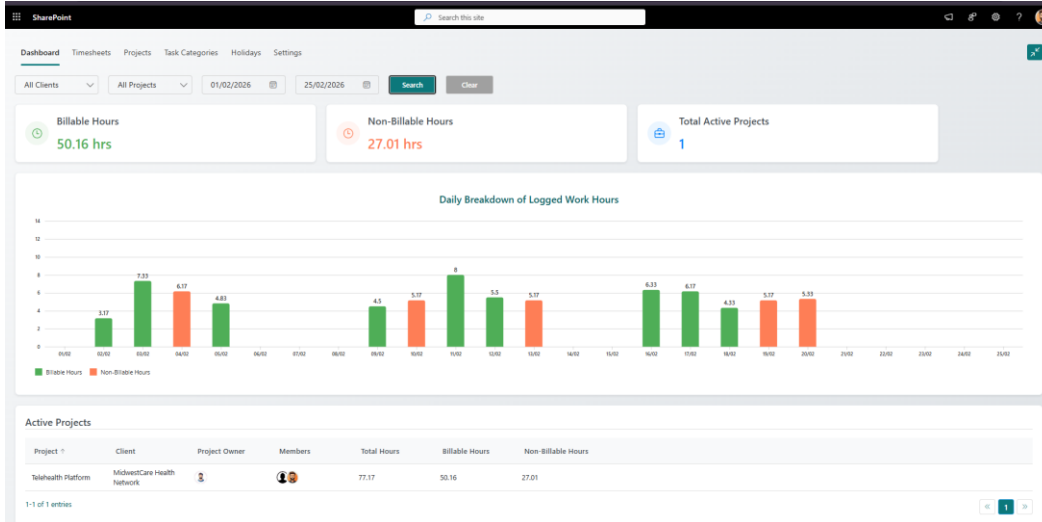
Admin users have full access to the system and can manage all available modules.

The Admin navigation menu includes the following modules:

- Dashboard
- Timesheet
- Projects
- Task Categories
- Holidays
- Settings



7. Dashboard (Admin)



Admin Dashboard provides administrators with a comprehensive overview of timesheet and project activities across the organization. Key features include:

- **Quick Overview of Work Hours and Active project**– View total Billable and Non-Billable hours logged by employees. View Total Active Projects Count
- **Filters for Data Analysis** – Admins can filter dashboard data by Client, Project, From Date, and To Date. The Search button applies the filters, while Clear resets them to show all data.
- **Daily Work Hours Chart** – Visualize work trends with a chart showing billable and non-billable hours per day, helping track productivity and project activity.
- **Active Projects Table** – Provides a concise summary of all active projects, including project name, client, assigned members, total hours, billable hours, and non-billable hours, making it easy to track performance briefly.

This layout allows admins to quickly monitor organizational productivity, project activity, and employee time utilization from a single view.



8. Timesheet (Admin)

SharePoint Search this site

Dashboard **Timesheets** Projects Task Categories Holidays Settings

All Clients All Projects All Log Types Angela Cor... 01/02/2026 25/02/2026 Search Clear

Total Hours: 77.17 Billable Hours: 50.16 Non-billable Hours: 27.01 Total Projects: 1 + Add Timesheet

Export To Excel

Date	User Name	Description	Project	Log Type	Task Category	Total Hour	Actions
20/02/2026	Angela Cornish	Write backend unit tests for authentication and appointment modules.	Telehealth Platform	Non-Billable	Testing	5:20	
19/02/2026	Angela Cornish	Implemented Redux state management for authentication and patient data handling.	Telehealth Platform	Non-Billable	Testing	5:10	
18/02/2026	Angela Cornish	Integrated secure video consultation interface with session validation.	Telehealth Platform	Billable	Development	4:20	
17/02/2026	Angela Cornish	Built patient and doctor dashboards with appointment overview and medical record access.	Telehealth Platform	Billable	Development	6:10	
16/02/2026	Angela Cornish	Developed responsive login, registration, and MFA verification screens using React & Tailwind.	Telehealth Platform	Billable	Development	6:20	
13/02/2026	Angela Cornish	Implemented password hashing, token expiration policies, and audit logging middleware.	Telehealth Platform	Non-billable	Design	5:10	
12/02/2026	Angela Cornish	Configured PostgreSQL database and implemented indexing for optimized queries.	Telehealth Platform	Billable	Development	5:30	
11/02/2026	Angela Cornish	Integrated Twilio API for secure telehealth video consultations.	Telehealth Platform	Billable	Development	8:00	
10/02/2026	Angela Cornish	Implemented patient record management APIs with secure validation and access restrictions.	Telehealth Platform	Non-billable	Design	5:10	
09/02/2026	Angela Cornish	Developed authentication APIs with JWT and multi-factor authentication logic.	Telehealth Platform	Billable	Development	4:30	

1-10 of 14 entries

Timesheet module allows Admin to view and manage all timesheet entries in the system.

Admins can:

- View timesheets for all users
- Add new timesheet entries
- Edit or delete existing entries
- Export timesheet data



9. Project Management (Admin Only)

The screenshot displays the SharePoint Project Management interface. At the top, there is a navigation bar with 'Dashboard', 'Timesheets', 'Projects', 'Task Categories', 'Holidays', and 'Settings'. Below this is a search bar for projects and filters for 'All Clients' and 'All Status'. The dashboard features three summary cards: 'Total Projects' (1), 'Active Projects' (1), and 'Total Estimation Hours' (420 hrs). Below these are cards for 'Total Hours: 77.17', 'Billable Hours: 50.16', and 'Non-billable Hours: 27.01'. An 'Add Project' button is located on the right. The main area contains a table with the following data:

Title	Client	Project Owners	Project Members	Estimation	Project Description	Technologies	Status	Actions
Telehealth Platform	MidwestCare Health Network	[User Icon]	[User Icon]	420	MidwestCare Patient Portal System is a secure, HIPAA-compliant healthcare web application developed for MidwestCare Health Network to enhance patient engagement and streamline clinical workflows. The platform allows patients to schedule appointments, access medical records, download lab reports, request prescription refills, and attend virtual telehealth consultations. Doctors and administrative staff can manage patient histories, billing, and appointment calendars through a role-based	Frontend: React.js, TypeScript, Tailwind CSS Backend: Node.js, Express.js Database: PostgreSQL Authentication: JWT + Multi-Factor Authentication Video Integrations: Twilio API Cloud Hosting: AWS (EC2, RDS, S3) DevOps: Docker, GitHub Actions	In Progress	[Action Icons]

Project Management module allows administrators to create and manage projects within the system.

Projects help organize timesheet entries and assign work to employees.

Only **Admin users** can access this module.



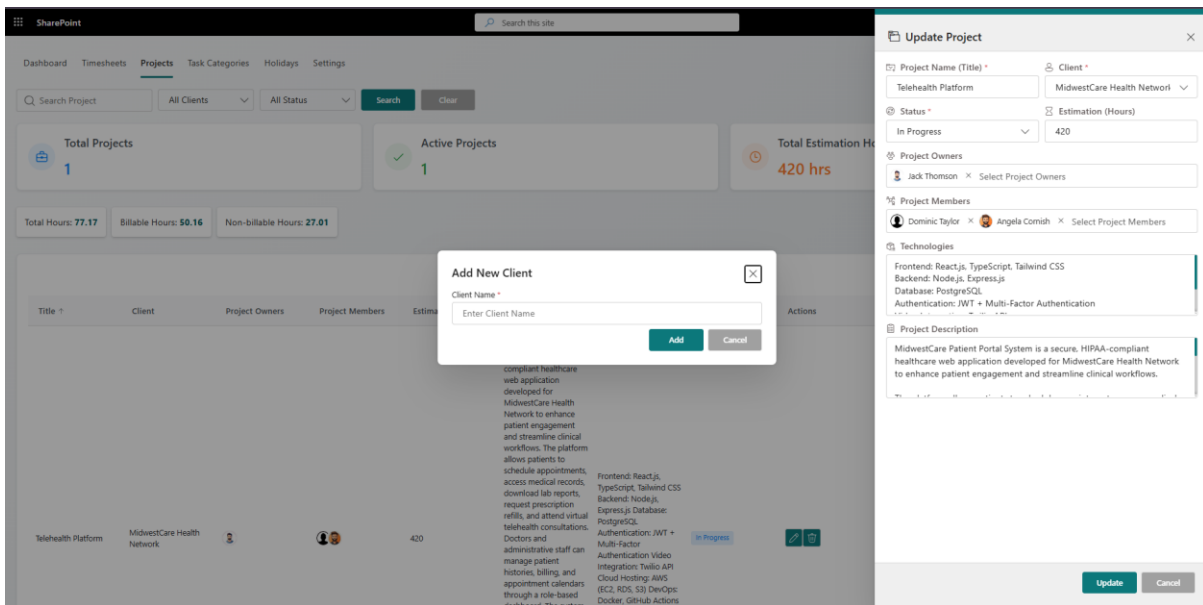
9.1 Creating a Project

The screenshot displays the SharePoint 'Projects' page. At the top, there are navigation tabs for 'Dashboard', 'Timesheets', 'Projects', 'Task Categories', 'Holidays', and 'Settings'. Below this is a search bar and filters for 'All Clients' and 'All Status'. Summary cards show 'Total Projects: 1', 'Active Projects: 1', and 'Total Estimation Hrs: 420 hrs'. A table below lists project details, including 'Title', 'Client', 'Project Owners', 'Project Members', 'Estimation', 'Project Description', 'Technologies', 'Status', and 'Actions'. An 'Update Project' modal is open on the right, containing fields for 'Project Name (Title)', 'Client', 'Status', 'Project Owners', 'Project Members', 'Technologies', and 'Project Description'. The 'Technologies' field lists: Frontend: React.js, TypeScript, Tailwind CSS; Backend: Node.js, Express.js; Database: PostgreSQL; Authentication: JWT + Multi-Factor Authentication.

To create a project, admins first click on the “Add Project” button to open the project form. They must provide key details including the Project Name, Client, Status, Estimated Hours, Project Owners, Project Members, Technologies used, and a Project Description.

Projects define which employees can log time, and only those assigned as Project Members will be able to select the project in their timesheets.

Admins can also add a new client from the Project form, allowing them to manage clients seamlessly while setting up or updating projects.



9.2 Project Status Options

Each project can be assigned a status.

Available project statuses include:

- In Progress
- Completed
- On Hold
- Cancelled

These statuses help track the current progress of the project.

9.3 Project Members

Projects allow assigning multiple users.

The following fields support multiple user selection:

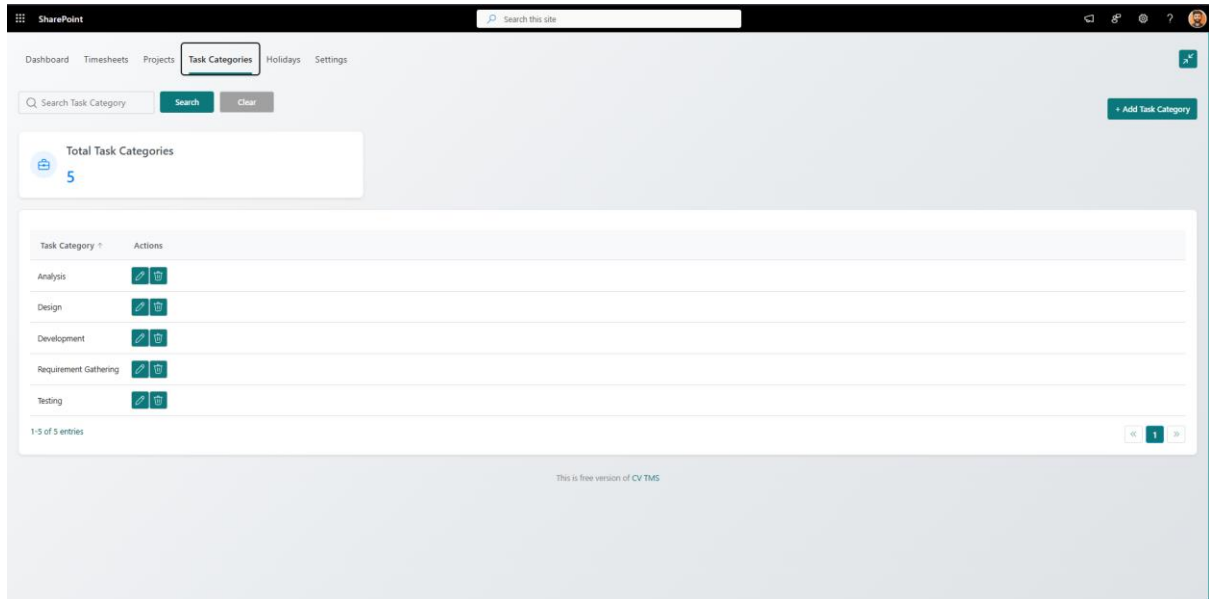
- Project Owners
- Project Members

Users listed as **Project Members** will be able to select the project when adding timesheets.



Managers assigned through projects will be able to monitor the logs of those employees.

10. Task Categories (Admin Only)



Task Categories are used to classify the type of work performed in timesheets. When logging time, users must select the appropriate task category to ensure their work is accurately recorded and categorized.

Task categories are created and managed by Admin users, allowing the organization to define standard work types such as Development, Testing, Documentation, Meetings, or Code Review. Using the correct category helps maintain consistency across timesheets and makes reporting and project analysis easier.



11. Holidays (Admin Only)

Festival Name	Date	Description	Actions
New Year	01/01/2026	On Account Of New Year	[Edit] [Delete]
Uttarayan	14/01/2026	Uttarayan Festival	[Edit] [Delete]
Holi	04/03/2026	Holi Festival	[Edit] [Delete]
Eid	20/03/2026	Eid Festival	[Edit] [Delete]
Christmas	25/12/2026	Christmas Festival	[Edit] [Delete]

Holidays module allows to maintain a list of company holidays.

This helps keep a record of important dates within the organization.

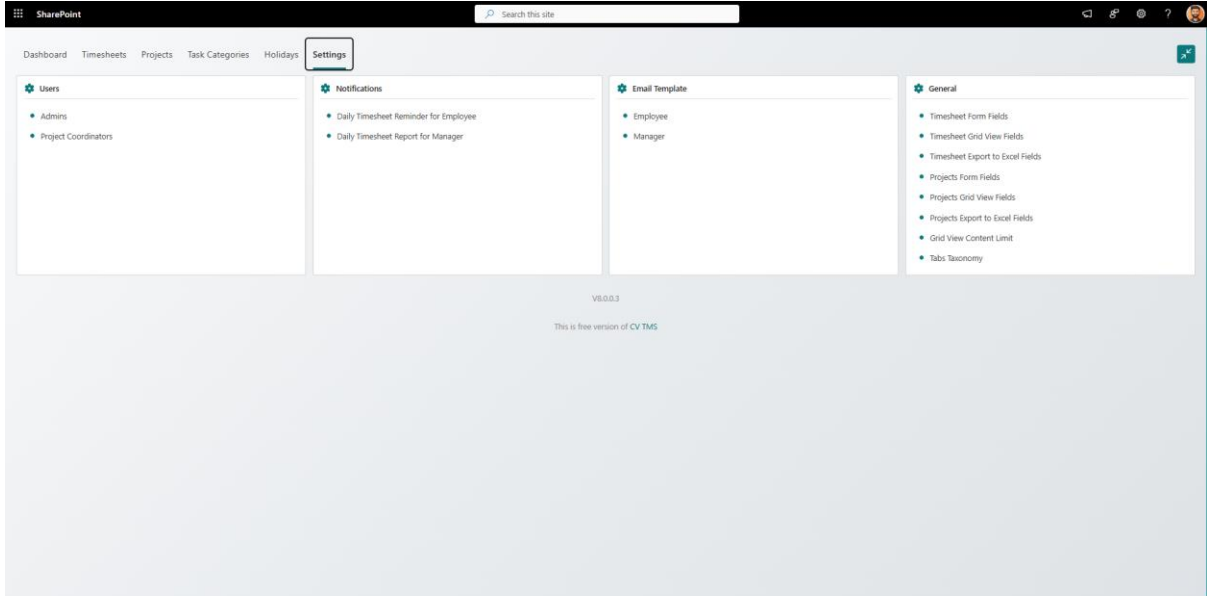
Each holiday record includes key details such as the **Festival Name**, the **Date of the holiday**, and a **Description** providing brief information about the occasion

Admin users can:

- Add Holiday
- Edit Holiday
- Delete Holiday



12. Settings (Admin Only)



Settings module allows Admin users to configure system behaviour.

The module contains the following sections:

- Users
- Notifications
- Email Templates
- General Settings

12.1 Users

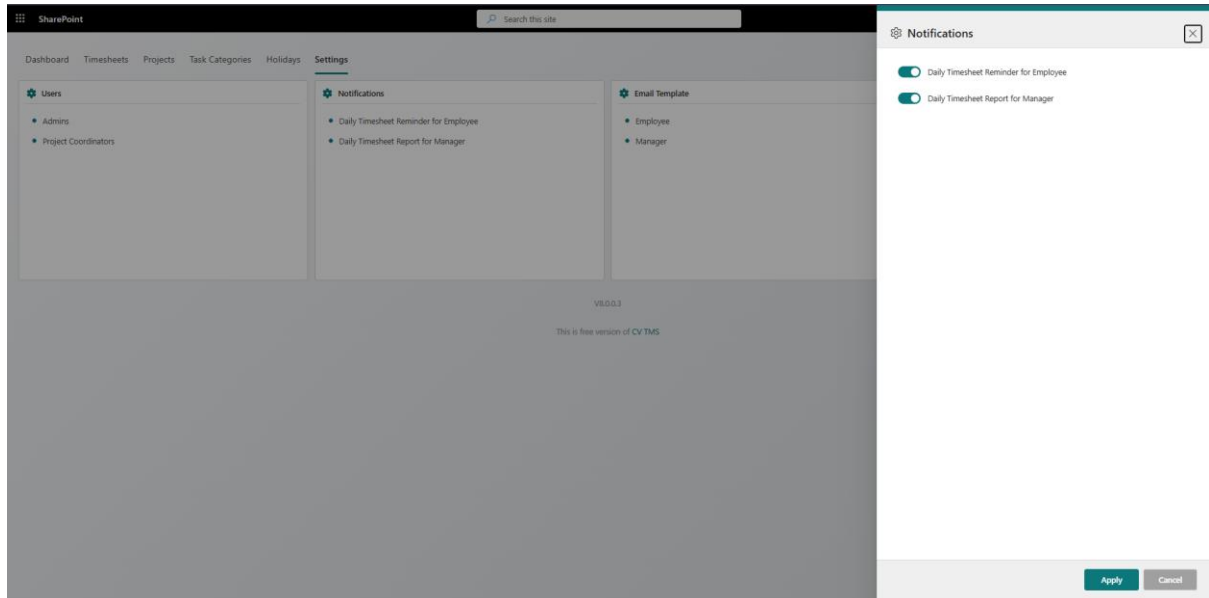
Admins can manage user access groups:

- Admins
- Project Coordinators

Users can be added to these groups to assign permissions.



12.2 Notifications



Notification settings allow Admins to configure reminder emails.

Available notifications include:

- Daily timesheet reminder for employees
- Daily timesheet reminder for managers

Note: The Notifications feature is enabled through a Microsoft Power Automate solution separately from app source or contact us for more info.



12.3 Email Templates

The screenshot displays the SharePoint 'Email Template' configuration interface. The left sidebar shows navigation options: Dashboard, Timesheets, Projects, Task Categories, Holidays, and Settings. The main content area is divided into three sections: 'Users' (listing Admins and Project Coordinators), 'Notifications' (listing Daily Timesheet Reminder for Employee and Daily Timesheet Report for Manager), and 'Email Template' (listing Employee and Manager). The 'Email Template' section is expanded, showing a 'Placeholders' section with 'User Name', 'Date', 'Day', and 'Table' options. Below this, there are radio buttons for 'Employee' and 'Manager'. The 'Email Subject' is 'Timesheet Reminder'. The 'Email Body' contains a message: 'Dear [User Name], I hope this email finds you well. This is a friendly reminder to kindly submit your timesheet for [Day] as it is currently pending in our system. Timely submission of timesheets is crucial for accurate payroll processing and project tracking. Please take a moment to log in to the timesheet system and input your hours for [Date]. If you have any issues or concerns regarding the submission, feel free to reach out to hr department. Your cooperation in this matter is greatly appreciated. Thank you for your prompt attention to this task. [Click here to open Timesheet](#) ** Please ignore this email, if you were on leave that day ** Best regards,'. There is also a 'CC' field with the placeholder 'Enter CC Users'. At the bottom right, there are 'Apply' and 'Cancel' buttons.

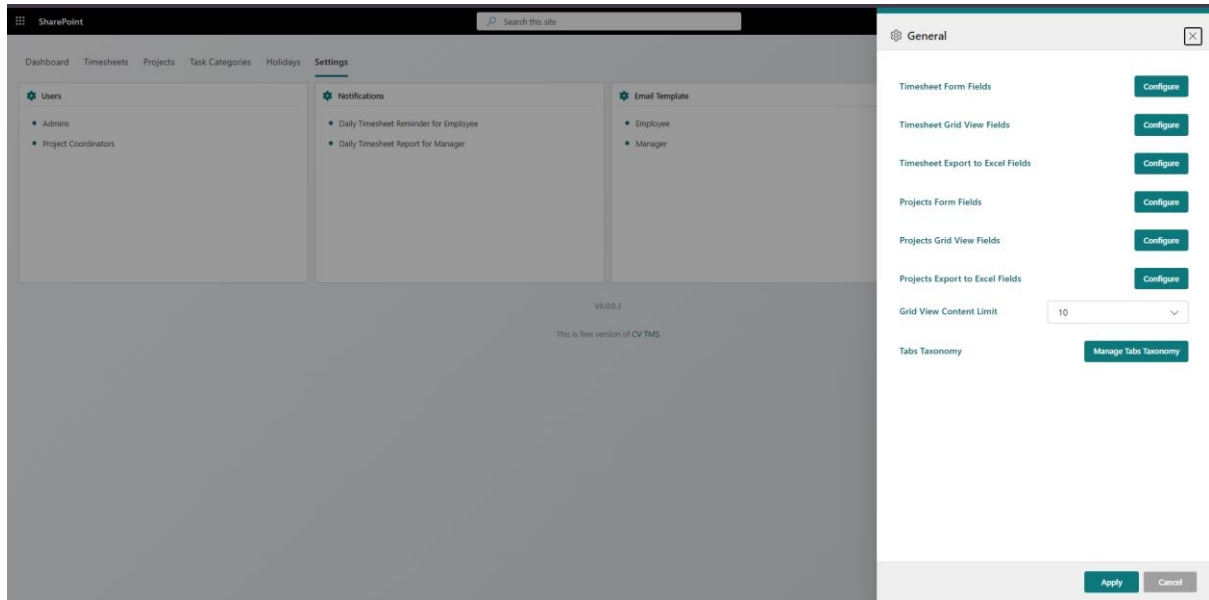
Admins can configure email templates used for timesheet reminders.

Templates are available for:

- Employee notifications
- Manager notifications



12.4 General Settings



General settings allow administrators to configure system fields and layout.

When admins click on "Configure," they can show or hide fields and mark them as required or optional with this Fields.

- Timesheet Form Fields
- Timesheet Grid Fields
- Timesheet Export Fields
- Project Form Fields
- Project Grid Fields
- Project Export Fields



SharePoint

Dashboard Timesheets Projects Task Categories

Users

- Admins
- Project Coordinators

Timesheet Form Fields

Column Title	Is Visible	Is Required		
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
User Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Hour	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Minute	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Log Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Billable Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Billable Minutes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×
Task Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⊙	×

Save Cancel

Additional configuration options include:

- Grid View Content Limit (10, 25, 50 records per page)
- Tabs Taxonomy for renaming navigation tabs

SharePoint

Dashboard Timesheets Projects Task Categories

Users

- Admins
- Project Coordinators

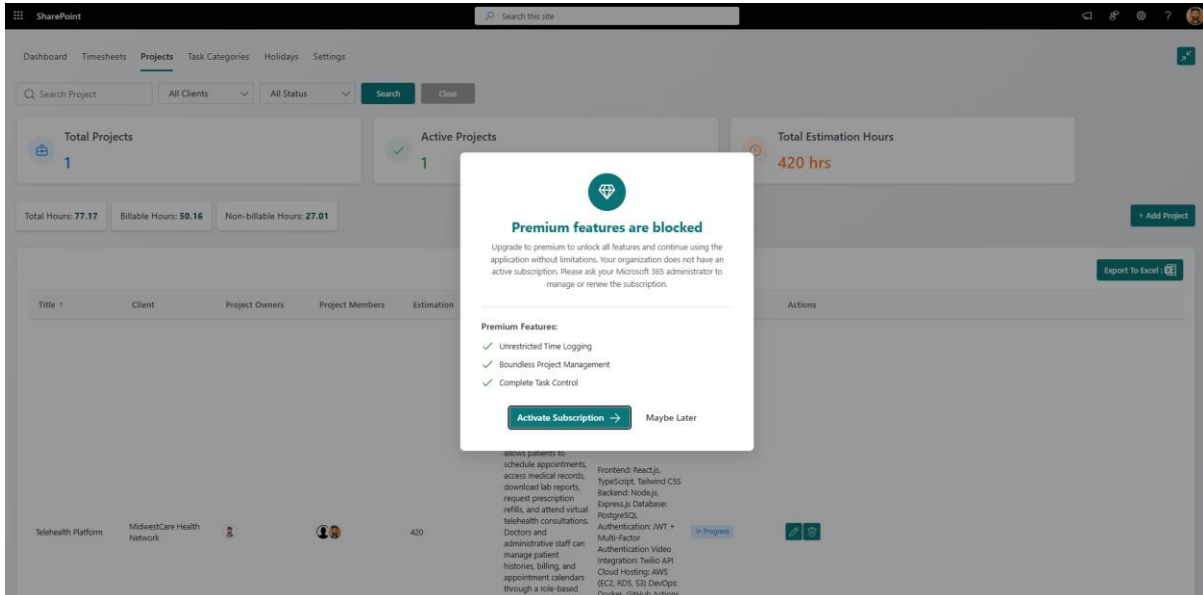
Manage Tabs Taxonomy

Original Label	New Label *		
Dashboard	Dashboard	⊙	×
Timesheets	Timesheets	⊙	×
Projects	Projects	⊙	×
Task Categories	Task Categories	⊙	×
Holidays	Holidays	⊙	×
Settings	Settings	⊙	×

Save Cancel



13. System Limitations – Free Version



The **Free Version of CV TMS** includes limited functionality.

The following restrictions apply:

- Maximum **200 timesheet entries**
- Maximum **1 project**
- Maximum **5 task categories**

If a user attempts to exceed these limits, the system will display a **Premium Upgrade popup**.

The free version provides limited functionality. To use the full feature of this solution, you need to activate or purchase subscription. Please Purchase Subscription [click here](#) to learn more about plans options or to purchase a license.