Office Timesheets

AI Timesheet Assistant

User's Guide

For everyone who records time in Office Timesheets, and for the managers who review it.

Version 9.2 | September 2026

Contents

Introduction

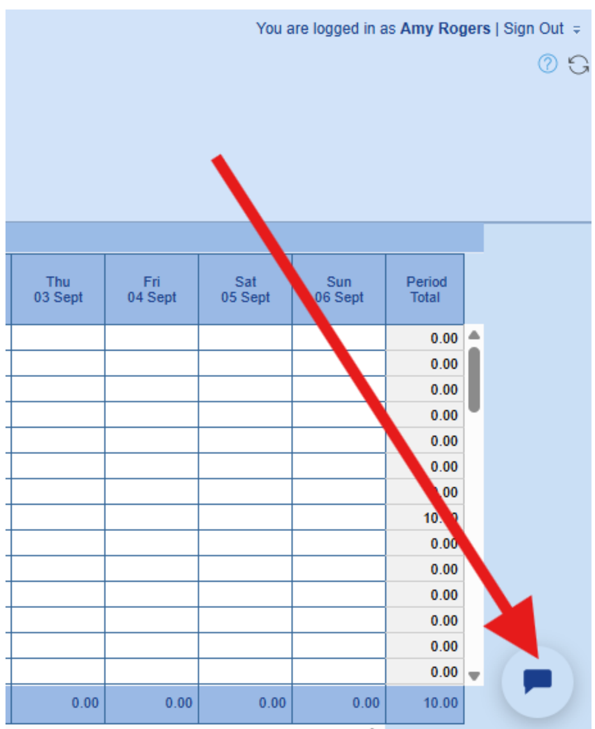
The AI Timesheet Assistant is a conversational helper built into Office Timesheets. It lets you record your time, check your leave balances, request time off, and submit your timesheet by tapping a few buttons or typing a plain sentence. If you manage a team, it also shows you where every team member stands and lets you approve their timesheets - all from the same small panel.

The assistant is designed around three promises:

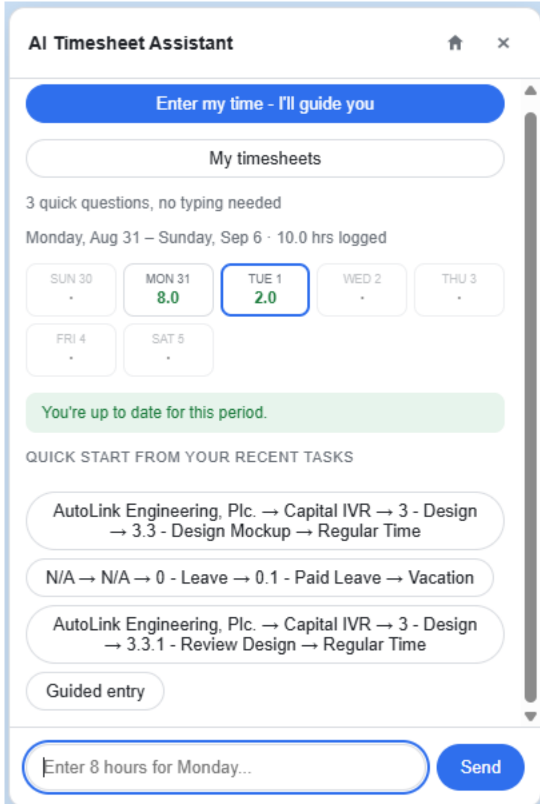
- **Nothing is saved without your confirmation.** Every entry, request, and approval is shown to you as a card first. You tap a confirm button; only then does anything change in Office Timesheets.
- **You see what your role allows.** The buttons and views that appear depend on your profile permissions and on how your company has configured Office Timesheets. If a feature described here is missing for you, it is not enabled for your account.
- **Typing is optional.** Everything can be done with the buttons the assistant offers. Typing is a shortcut, never a requirement.

Opening the assistant

Look for the assistant launcher in the corner of your Office Timesheets window (or the assistant panel, if your company embeds it directly on a page). Tap it to open. The home screen greets you with your current reporting period and a set of quick-start buttons.



The header has two controls: **Home** returns you to the home screen at any time (when nothing is in progress), and **Close** hides the panel. Your conversation is kept; reopening the panel picks up where you left off.



How this guide is organized

Part 1 - Personal Assistant covers everything about your own timesheet: entering time, filling missing days, balances, time off, and submitting your periods.

Part 2 - Manager Assistant covers the team features that appear when you have manager permission: the team view, period navigation, team history, and approvals.

Each part ends with a table of things you can type, and a short list of tips.

Part 1 - Personal Assistant

This part applies to everyone who records time. Managers see these features too, alongside the team features in Part 2.

1.1 The home screen

The home screen shows your current reporting period as a strip of days. Each day shows the hours already logged; days with no hours on a scheduled workday are highlighted as missing. Below the strip you will find quick-start buttons:

- **Enter my time - I'll guide you** starts guided entry: three quick questions, no typing needed.
- **Log {day}** or **Fill missing days** appears when the period has days with no hours yet.
- **Check my leave balances** and **Take time off** appear when time off is set up for your account.
- **My timesheets** appears when your profile allows you to submit your own periods.
- A row of your **recent tasks** lets you start an entry for something you worked on recently with one tap.

> **Tip** The strip is tappable. Tap any day to start an entry for that day directly - the assistant skips straight to asking how many hours.

1.2 Entering time

There are three ways to record time, and you can mix them freely.

Guided entry

Tap **Enter my time - I'll guide you**. The assistant asks three questions, each with tappable answers:

1. **Which day?** Tap Today, Yesterday, Tomorrow, a day from the strip, or pick any date.
2. **How many hours?** Tap a common value or type one, like 7.5 or 7:30.
3. **What did you work on?** Tap one of your recent tasks or Browse all tasks to search the full list of tasks assigned to you.

Typing a sentence

Type what you did in plain words, for example **"Enter 8 hours for Monday on the ERP upgrade"** or **"6 hours yesterday, code review"**. The assistant reads the day, the hours, and the task from your sentence and asks only for whatever is missing. You can also describe several entries in one message - "3 hours standup and 5 hours testing yesterday" - and the assistant proposes them together.

When a task description could match more than one of your tasks, the assistant shows the candidates and asks which one you meant. If nothing matches, it offers the task browser.

Starting from a day or a task

Tap a day on the home strip, or a recent-task button, and the assistant starts an entry with that part already filled in.

1.3 Reviewing and confirming

Once the assistant has a day, hours, and a task, it shows a **confirmation card** summarizing the entry (or entries). Nothing is saved yet. From the card you can:

- **Yes, create it** - saves the entry. The assistant confirms with the day's new total, and a short "Saved" notice appears.
- **Edit** - lets you change the day, the hours, the task, the note, or the start time before saving.
- **Cancel** - discards the proposal. Nothing is saved.

Notes and start times

Before saving, the assistant asks once whether you would like to add a note. Tap **No, save it** to skip. If your company requires notes for the task or profile, the assistant will ask for one before the entry can be saved - just type it and confirm again. The same applies to start times: if your company records start and stop times, the assistant asks for a start time like 9:00 when it is needed.

> **Good to know** A proposal that is left waiting for a long time is set aside rather than saved late. If you come back to an old card, the assistant shows it again and asks you to re-confirm.

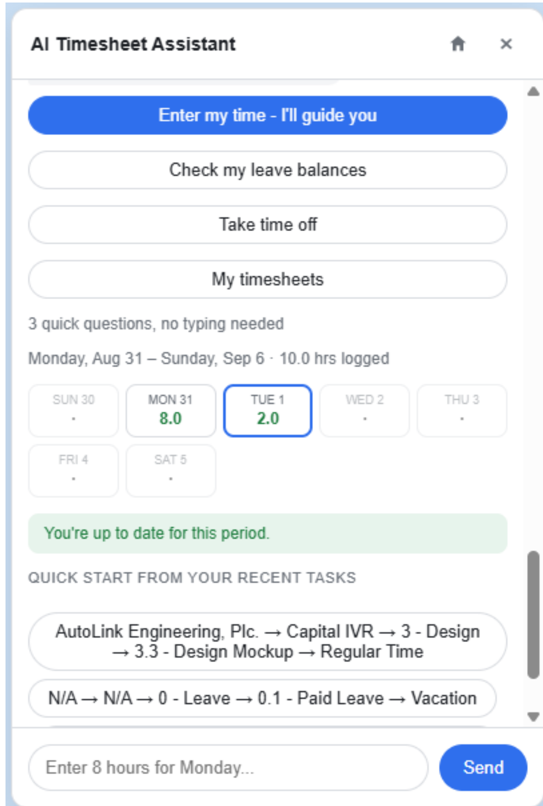
1.4 Filling missing days

When the current period has scheduled workdays with no hours, the home screen offers **Log {day}** for a single missing day or **Fill missing days** when there are several. Fill missing days walks through the days in order: after each entry is saved, the assistant moves on to the next missing day automatically ("Next up: Tuesday"). Tap Cancel at any point to stop.

1.5 Checking leave balances

Tap **Check my leave balances** (or type "how much vacation do I have left?"). The assistant shows a card with your leave types and the figures your company displays - typically the totals accrued, used, pending, and available. Tap a leave type to see its full detail. The card uses exactly the values and formats shown on your Time Off pages, so the numbers always match.

This feature appears only when time off accruals are configured for your account.



1.6 Requesting time off

Tap **Take time off** (or type "I need next Thursday off"). The assistant collects the request step by step, offering tappable options at each step:

1. **Leave type** - tap one of your leave types, or type its name.
2. **Task** - if your company records time entries for approved leave, choose the task the entries should go to. This step is skipped when it does not apply.
3. **Title** - a short title for the request, like "Family trip".
4. **Start day** - tap a day or pick a date.
5. **Duration** - tap 1, 2, 3, or 5 days, or type a duration like "3 days", "24 hours", or "half day". If you type a bare number, the assistant asks whether you mean hours or days.
6. **Start time** - asked only when your company's settings require it.
7. **Note** - optional, unless a note is required for the request.

A **Confirm time off request** card then summarizes everything. Tap **Yes, submit request** to send it, **Edit** to change a step, or **Cancel**. On success the assistant reports the request and its status - for example "Request submitted - 3 days Vacation starting Mon, Aug 10. Status: Pending." - so you know whether it still needs approval.

Blackout dates

If your request touches a blackout date, the assistant shows a warning with **Continue** and **Cancel**. Continue submits the request anyway (your company may still review it); Cancel drops it. Nothing is sent until you choose.

1.7 Submitting your timesheet

When your profile allows it, a **My timesheets** button appears on the home screen. Tap it (or type "submit my timesheet") to see your reporting periods - the recent past, the current period, and the upcoming ones - one card per period showing:

- The **period dates** and your **logged hours**.
- The **status**, shown as a colored dot with the step name your company uses (for example Submitted, Approved, or your organization's own step names). System statuses such as Due, Not Due, and Overdue appear the same way.
- The **latest note** on the period, with the name of who wrote it - so if your manager moved a period back with a comment, you see the comment right here.
- A **button for each action** you can take on that period, such as Submit. Periods with nothing to do show no buttons.

Tap an action button, review the confirmation card, and tap **Yes, Submit** (the button carries your company's action name). The assistant reports the step your period landed on. If your company requires a note for that step, the assistant asks for it before saving.

Signatures

Some steps require your signature. If you have a signature stored in Office Timesheets, the assistant shows your company's signature notice with **Continue** and **Cancel**; Continue applies your signature and saves. If you do not have a stored signature, those steps are not offered in the assistant - use the Approval page, where you can sign.

> **Tip** Ask "did my manager approve my week yet?" to open the same view. The status dot and the latest note answer the question, and the Submit button is right there if the period was sent back for changes.

1.8 Things you can say

The assistant understands plain sentences for the tasks below. Buttons always work too; typing is simply faster once you know the phrases.

To do this	Try saying
Log time	"Enter 8 hours for Monday on the ERP upgrade" - "6 hours yesterday, code review" - "3 hours standup and 5 hours testing yesterday"

To do this	Try saying
Request time off	"I need to take next Thursday off" - "Request 3 days of vacation starting Monday" - "I want to book PTO for next week"
Check balances	"How much vacation time do I have left?" - "Check my PTO balance" - "How many sick days have I used this year?"
Submit or check your timesheet	"Submit my timesheet for last week" - "Send my hours in for approval" - "Did my manager approve my timesheet yet?"
Answer a card	"submit" or "yes" confirms the card showing; "cancel" abandons it

A few phrases deliberately go elsewhere: hours you already worked - even against a vacation task - are logged as time entries, not requests; and the assistant cannot cancel an existing time off request, so it will say so rather than guess.

1.9 Tips and troubleshooting

- **"Let's finish the current item first."** You typed a new request while an entry or card was in progress. Finish it, or type "cancel", and then ask again.
- **"I didn't quite catch that."** Rephrase with a day, hours, and what you worked on - or just use the buttons.
- **"Your session has ended."** Sign in to Office Timesheets again; your unsent message is kept in the box.
- **A button is missing.** Buttons appear only for features enabled for your account - time off, balances, and My timesheets each depend on your company's configuration and your permissions.
- **Wrong entry saved?** The assistant only creates entries; edit or delete them on your timesheet as usual.

Part 2 - Manager Assistant

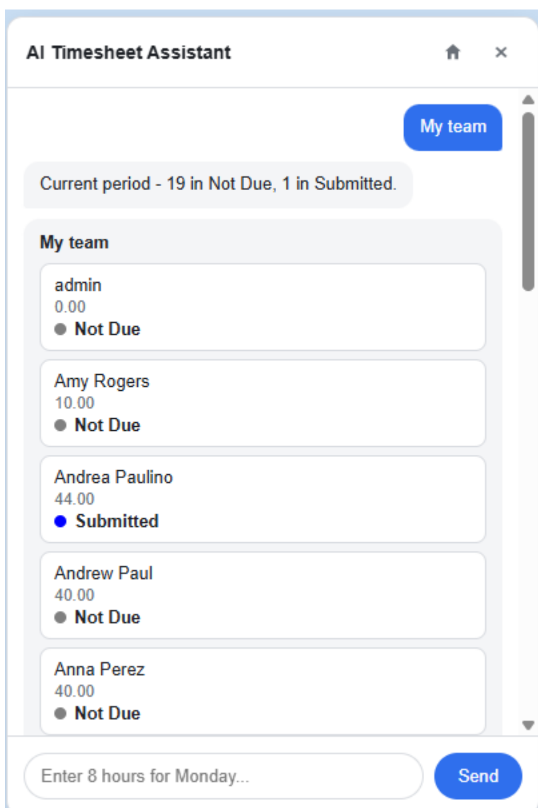
This part applies when your profile includes manager permissions. A **My team** button appears on your home screen, and the assistant understands questions about your team. Everything in Part 1 still applies to your own timesheet.

2.1 The team view

Tap **My team** (or type "show me my team"). The assistant replies with a one-line summary of the current period - for example "Current period - 2 in Supervisor review, 1 in Overdue, 1 with no sheet" - followed by a card with one row per team member:

- The employee's **name**, their **logged hours** for their own reporting period, and the **latest note** on that period.
- The **status** as a colored dot with the step name. Step names and colors are exactly those configured in your Office Timesheets approval process; system statuses (Due, Not Due, Overdue) appear in their standard colors.
- **"No reporting period"** for an active employee who has no timesheet for the period.

The team you see is the team Office Timesheets already lets you manage - by group or by element - and nobody else.



Tip Every row is a button. Tap an employee's row to open their details.

2.2 Employee details

Tapping a row opens that employee's period: the dates, logged hours, days with no hours (when available), and the status with its latest note. Below the details you will find:

- **Action buttons** for each approval move your company allows you to make on this timesheet (see 2.5).
- **Back to team** to return to the list.

2.3 Navigating periods

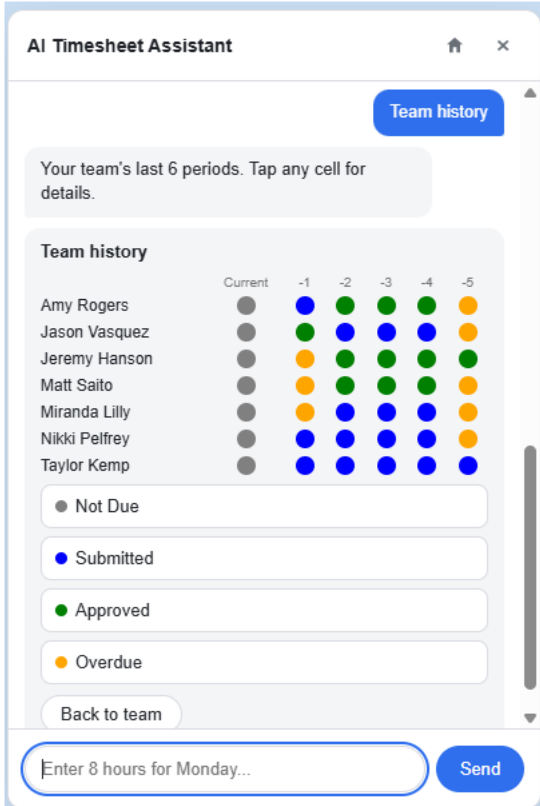
The team card offers **Previous period** and **Next period** buttons, plus **Current period** to jump back. Because each employee can be on their own reporting cycle, "previous period" means each person's own previous period - the assistant shows every member's own dates rather than one shared week. You can look ahead as well as back: future periods show whatever timesheets already exist.

Employees drop off the list for periods before their approval start date, so historical views show only the people who were accountable at the time.

2.4 Team history

Tap **Team history** for a grid of the last six periods: one row per employee, one column per period (Current, -1, -2, and so on). Each cell is a colored dot in the step's configured color. A hollow dashed dot marks a period with no timesheet; a blank cell means the employee was not accountable for that period. Hover or long-press a dot to see the period dates, hours, and step; tap a dot to open that employee's period.

Above the grid the assistant points out the most notable pattern, such as "Dana Kim has no sheet for 4 of them." A legend below the grid shows the step colors.



2.5 Approving timesheets

Open an employee's details. The action buttons are the moves your company's approval process allows you to make right now - for example Approve, or Return to employee - using your organization's own action names. Where a step is approved per element, you will see one button per element ("Approve (Consulting)").

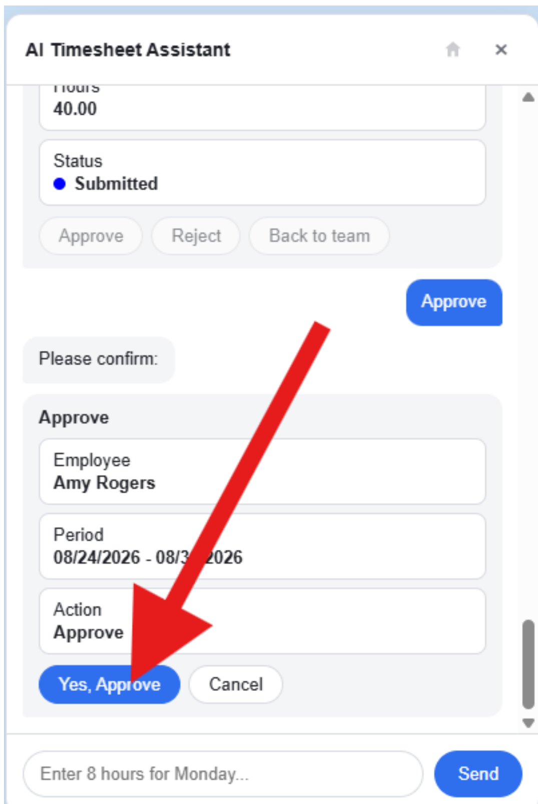
1. Tap the action. The assistant shows a confirmation card with the employee, the period, and the action.
2. The assistant offers to add a note. Tap **Add a note** to type one, or **No, save it** to continue. If your company requires a note for this step, the assistant asks for it.
3. Tap **Yes, {action}** to confirm. The assistant reports the result: "Done - Approve for Priya Shah (Jul 13 - Jul 19). Now in Payroll hold."

Approvals made here go through exactly the same process as approvals made on the Approval page - the same validation, notes, notifications, and history - so nothing behaves differently because it came from the assistant.

When a move is not possible

- **"This step isn't allowed for this timesheet anymore."** The timesheet moved since you opened it (for instance, someone approved it from the full page). Open the employee again to see the current state.
- **Required hours.** If the step requires a minimum number of hours, the assistant relays your company's message and leaves the card so you can cancel or retry.
- **A note is required.** The assistant asks for it and then confirms again.

> **Good to know** Typing "approve Miguel's timesheet" opens the team view - it never approves anything by itself. Approvals always end with you tapping a confirm button.



2.6 Your own timesheet as a manager

Managers see both **My timesheets** and **My team** on the home screen. Submitting your own period works exactly as described in 1.7, including the note and signature rules.

2.7 Things you can say

To do this	Try saying
See your team	"Show me my team" - "Who on my team hasn't submitted their timesheet?" - "Which of my employees are overdue?"

To do this	Try saying
Find pending approvals	"Any timesheets waiting for my approval?" - "Show me pending approvals"
Act on a timesheet	"Approve Miguel's timesheet" opens the team view; tap his row, then the action
Your own timesheet	"Submit my timesheet" - "Did my manager approve my week?"

2.8 Good to know

- **Reminders are automatic.** Office Timesheets sends timesheet reminders through its daily background task; the assistant does not send reminders itself.
- **Resubmitted periods.** When an employee corrects a period you returned, the latest note on their row tells the story - look for their comment beside the status dot.
- **Signatures.** A manager moving someone else's timesheet is never asked to sign; signature rules apply only when an employee submits their own period.
- **Permissions decide the view.** The team features appear only with manager permissions; the own-timesheet features only with employee approval permissions. Both can be present on one profile.

Appendix - Privacy and security at a glance

The assistant keeps your data inside Office Timesheets. When you type a sentence, only that sentence (never your timesheet data) is interpreted by the language model; every answer you see is composed from your own Office Timesheets data by Office Timesheets itself. Buttons never involve the model at all.

- Nothing is saved, submitted, or approved without your explicit confirmation on a card.
- You can only see and act on what your Office Timesheets permissions already allow.
- Conversations are stored in your company's Office Timesheets database, alongside your other timesheet data.
- Your company can disable the language-model features entirely; the buttons continue to work.

For the full description, see the AI Timesheet Assistant Security and Compliance guide.