AI Timesheet Assistant

User's Guide

Enter time, check leave balances, and request time off — by tapping or by typing.

Contents

1. Meet the assistant

The AI Timesheet Assistant is a conversational way to work with Office Timesheets. Instead of navigating entry forms, you have a short exchange: the assistant asks what it needs, you answer by tapping a button or typing, and nothing is ever saved until you've reviewed it and confirmed. It can:

- Enter your time — guided step by step, or from one typed sentence like “8 hours on Acme yesterday”.
- Fill in the days you've missed, one after another.
- Show your leave balances — the same numbers as the My Accruals page.
- Submit a time off request, from leave type to confirmation.

Everything the assistant saves goes through the same rules as the regular entry forms — your permissions, locked periods, required notes, and approvals all apply exactly as they always have. The assistant never approves anything and never writes without your explicit confirmation.

Opening and closing

On the web, look for the assistant's round launcher button in the bottom-right corner of Office Timesheets — click it to open the panel, click the × to close. The assistant remembers whether it was open as you move between pages. On mobile, the assistant has its own full-screen page. The house icon in the header takes you back to the home view whenever you're not in the middle of something.

2. The home view

When you open the assistant, you land on home — a snapshot of your current reporting period and your quick starts.

The period strip

Each cell is one day of your reporting period: the date, and the hours you've logged, with days that have no hours yet marked with a dash. Today is outlined. Every cell is tappable — tap any day, past or future, to start an entry for it. Need a date outside the visible period? The date picker row lets you choose any date.

The reminder

When days in your period have no hours, the assistant tells you — “4 days have no hours yet” — and offers two shortcuts: log the first missing day, or Fill missing days, which walks you through every gap in order, one entry at a time, each with its own confirmation.

Quick starts

- **Enter my time — I’ll guide you** — the step-by-step way: the assistant asks for the day, the hours, and the task, one question at a time.
- **Check my leave balances** — your accrual balances by leave type (section 5).
- **Take time off** — submit a time off request (section 6).
- **Recent tasks** — chips for the tasks you've used lately; tap one to start an entry with the task already chosen.

Some quick starts appear only when the matching feature is enabled for your account — if you don't see Take time off or the balances option, your company's configuration doesn't include it or you don't have access.

3. Entering time

An entry needs three things: a day, the hours, and the task the time belongs to. You can supply them in any order, and at every step you can either tap an option or type your answer — buttons are shortcuts, never the only way.

Just type it

On installations with AI parsing enabled, the fastest way is one sentence. The assistant reads it, fills in whatever you said, and asks only for what's missing:

> *“8 hours on Acme yesterday”*
>
> *“7.5 on the Baxter migration”*
>
> *“6 hours on Acme ERP and 2 hours in our weekly meetings”*
>
> *“half a day on site at Acme last friday”*
>
> *“45 minutes on standup and 3 and a half hours on code review”*

Typos are fine — the assistant matches what you meant. Days can be words: today, yesterday, weekday names, “last tuesday”. Durations can be minutes, decimals, or day fractions — “half a day” and “a full day” convert automatically using your assigned shift length, so a half day for you is half of your shift. If your sentence names several pieces of work, the assistant handles them together (see Multiple entries below).

If typing a sentence just gets you a guided question instead, AI parsing isn't enabled on your installation — everything in this guide still works through the buttons.

Finding the task

Type a few words of the task's name — a client, a project, an activity — and the assistant finds it among your assigned tasks. If one clearly matches, it's chosen for you. If a couple could match, you'll get the top two to pick from. If nothing matches, the assistant says so and offers your recent tasks plus a Browse all option that lists everything you're assigned to. The assistant learns from your choices: pick “Acme Corporation → ERP Upgrade → Implementation” for the word “acme” once, and next time “acme” goes straight there.

The confirmation card

Before anything is saved you'll see a card: the task, the day, the hours, and any note or start time. Three choices:

- **Yes, create it** — saves the entry. You'll see a green confirmation float at the top for a few seconds, and the period strip updates.
- **Edit** — asks which detail to change (day, hours, task, note, start time), changes just that one, and shows the card again.
- **Cancel** — abandons the entry. Nothing is saved, ever, on Cancel.

Multiple entries at once

Say two or three pieces of work in one sentence — “6 hours on Acme and 2 in meetings” — and the assistant resolves each one (asking its questions per item where needed: “For ‘meetings’: how many hours?”), then shows one card listing all of them. One tap — “Yes, create both” — saves them together. Different days work too: “4 hours on Acme monday and 4 on Baxter tuesday” shows each entry with its own day. Editing lets you pick which entry to change; Cancel abandons all of them.

Notes and start times

Just before saving an entry without a note, the assistant asks once whether you'd like to add one — tap “No, save it” to continue, or add the note and re-confirm. If your company's rules require a note or a start time for the entry you're saving, the assistant will tell you and ask for it — type the note in your own words, or the time as 9:00 — then show the updated card to confirm.

Locked and special days

You can log any date — past, present, or future. If a date falls in a locked period or breaks one of your company's rules, the entry won't save; the assistant shows the reason in a highlighted red notice, keeps your entry exactly as it was, and you can adjust it or cancel.

4. Talking to the assistant

The assistant understands short natural replies at any point — you don't have to use the buttons:

You type…	What happens
yes / looks good	Confirms the card that's showing
cancel / never mind	Abandons what you were doing; nothing is saved
change the hours to 6	Edits the pending entry
7:30 (at the hours question)	Understood as seven and a half hours
a task name (at the task question)	Searches your tasks for it
anything (at the note question)	Becomes the note, word for word

Colors carry meaning in the assistant's replies: green means saved, red means something blocked a save (the message says what), and amber means a decision is needed from you. Every question includes a Cancel option — you're never trapped mid-conversation. If you close the panel or refresh the page mid-task, reopening brings the conversation back exactly where you stopped, with the last question still active.

5. Checking your leave balances

Tap Check my leave balances on home. You'll see your leave program's summary for the current accrual year — the same values, in the same format, as the My Accruals page. Which rows appear (yearly total, accrued, used, reserved, pending, available now, available to use, and so on) follows your company's display settings.

Below the summary, one button per leave type — Vacation, Sick, and whatever else your program contains — opens that type's full breakdown. All balances brings you back to the summary. If the Time Off module isn't licensed, or you don't have access, or no leave program is assigned to you, the assistant tells you exactly that instead.

6. Requesting time off

Tap Take time off on home. The assistant walks you through the request one question at a time — and as everywhere, each answer can be a tap or typed text:

- **Leave type** — tap one of your leave types, or type its name to search.

- **Task** — only if your company creates time entries from requests and allows choosing their task; otherwise this question is skipped entirely. Tap or type to search, same as leave types.
- **Title** — a short name for the request, like “Family trip”. Typed in your own words.
- **Start day** — tap a day on the strip, use the date picker, or the Today / Tomorrow shortcuts.
- **How long** — tap a preset (1, 2, 3, or 5 days) or type it: “3 days”, “24 hours”, “1.5d”. Type just a number and the assistant asks “hours or days?”. The end date is calculated for you.
- **Start time** — asked only when your company creates time entries from requests; answer 9:00-style or tap a preset.
- **Note** — offered before submitting; skip it or add one. If your company requires a note, the assistant will ask for it.

Then the confirmation card: leave type and duration, start day and time, title, task, and note. Edit changes any single answer (changing the leave type also re-asks the task, since tasks belong to leave types); Yes, submit request sends it; Cancel abandons it.

After you submit

The confirmation tells you the request's status — Pending when it awaits approval, or Approved when your company approves automatically. The request then follows your company's normal time off process; the assistant creates requests but never approves them. If your company creates time entries from approved requests, those appear through that process as usual.

Blackout dates

If your requested dates touch a blackout period, the request doesn't submit immediately. The assistant shows the warning in an amber notice with two choices: Continue submits the request anyway (the override is recorded), and Cancel abandons it — nothing is saved.

7. When something doesn't work

What you see	What it means and what to do
A red notice after confirming	Something blocked the save — the message says what (a locked period, a rule, insufficient balance). Your entry or request is kept as-is: Edit it, try again, or Cancel.
An amber notice with choices	The assistant needs a decision from you — read it and pick. Nothing happens until you choose.
“Session expired” banner	Your sign-in lapsed. Tap Try Again — anything you had typed is kept.
A brief connection error	Tap the retry link; the assistant re-sends exactly what you sent.
Typed sentences aren’t understood	AI parsing may not be enabled on your installation, or it may be momentarily unavailable — the buttons always work, and typing still works at every individual question.
An old confirmation card won’t respond	Answered questions become inactive — only the newest card is live. If you left a proposal overnight, the assistant re-shows it fresh rather than saving something stale.
No Take time off / balances buttons	The Time Off module isn’t part of your installation, or your account doesn’t have access.

8. Good to know

- Nothing saves without you. Every entry and every request ends in a card you explicitly confirm. Cancel always means nothing happened.
- Same rules as the forms. The assistant is another door into Office Timesheets, not a way around it — permissions, locks, validations, rounding, and approvals are identical.
- It learns your vocabulary. The task names you type and the picks you make teach the assistant your shorthand, so matching gets faster with use.
- Buttons and typing are equals. Anything a button does, words can do — and the other way round. Use whichever is faster for the moment you're in.
- Your conversation is yours. Each person's assistant conversation is private to their sign-in; entries it creates are marked as assistant-created for your administrators' audit trail.