

2025



Project Cloud: Timesheets App Configuration and Workflow Guide

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This document provides a comprehensive guide to the **Timesheets App** in CloudOffix, covering the Configuration menu, menu items, critical fields, reporting capabilities.

For user access rights refer to the Access Rights Management for Project Cloud Applications: [[Access Rights Management for Project Cloud Applications](#)]

For more information about configuring Project Cloud please refer to the Project Cloud General Settings Configuration Guide: [[Project Cloud General Settings Configuration Guide](#)]

Configuration Menu Overview

The **Configuration menu** in the Timesheets App, accessible under **Timesheets App > Configuration**, is available to users with **Timesheets / Manager** access rights. Below are the primary menu items and their functions.

Configuration Menu

1. Settings

- *Purpose:* Central hub for enabling/disabling features and setting global preferences.
- *Key Options:*
 - *Time Billing:* Enables selling services and invoicing based on time spent, as tracked in timesheets (timesheet-based), on fixed price (ordered quantities), milestones.
 - *Leaves:* Activates integration with the Leaves app. Validated leaves create timesheets automatically in a project's task that is chosen in the general settings.

2. Timesheet Reminder

- Create and schedule automated reminders to prompt users to complete their timesheets.

Menu Items

- *Timesheet:*
 - *My Timesheets:*
 - *Purpose:* The logged-in user can only see their own timesheets (on the timesheet record, the employee field should have their name).
 - *Functionality:* View, log, and edit timesheet entries only for themselves.
 - *All Timesheets:*
 - *Purpose:* Manager-only view of every timesheet entry in the system.
 - *Functionality:* Search, filter, and edit all timesheet entries.
 - *Timesheet Journals:*
 - *Purpose:* Manager-only view of every timesheet journal in the system.
 - *Functionality:* Managers can view timesheet journals and create new ones from here to send to the project's customer for approval.
 - **Important:** Timesheet journals can only be sent if the customer is set on the project and the user who is sending the journal should have Project / Manager access rights.
- *Reporting:* The reports open as a pivot view with an option to switch the list view.
 - *By Employee:*
 - Shows total hours logged per employee.
 - *By Project:*
 - Displays time consumption per project.
 - *By Task:*
 - Granular view of time spent on individual tasks.
 - *By Billing Rate:*
 - Breaks down recorded hours by applicable billing rate (employee timesheet cost)
 - *Costs and Revenues:*

- Combines timesheet data with employee timesheet cost rates and customer billing rates.

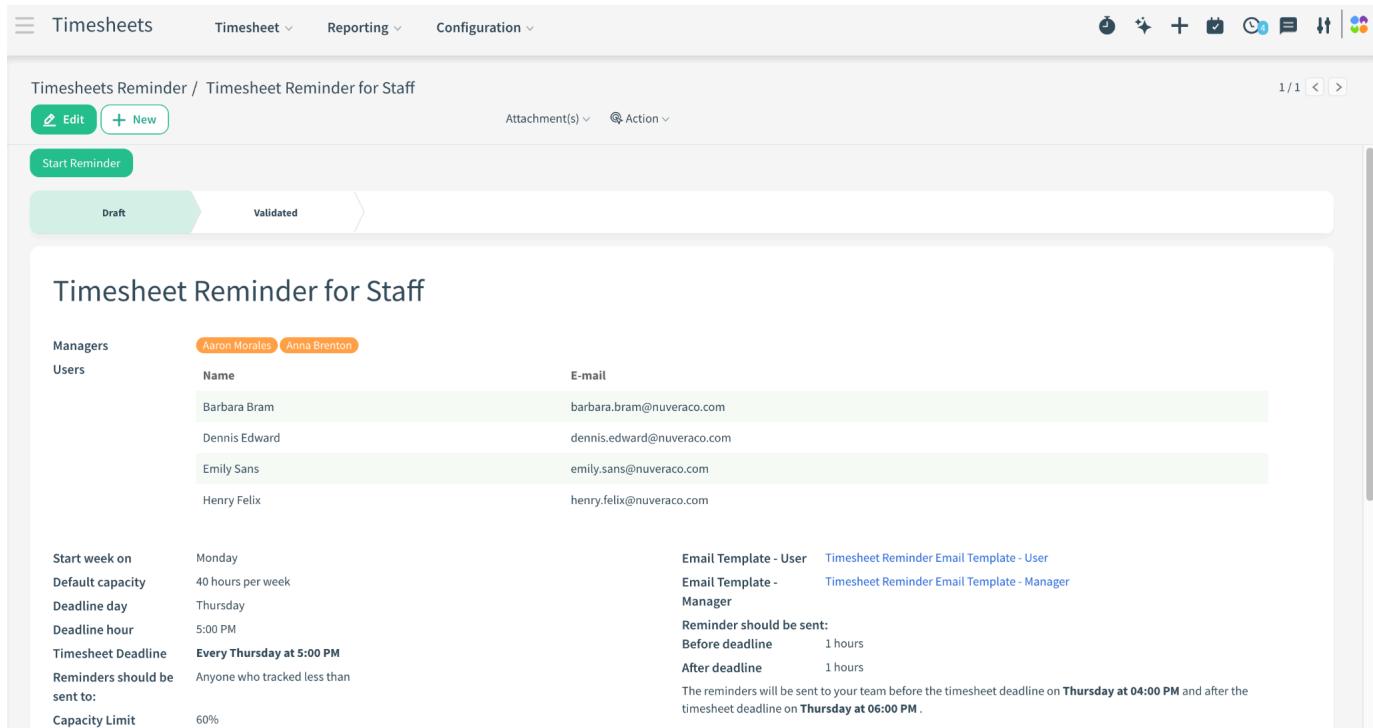
Critical Fields

The following fields are critical.

Critical Fields - Timesheets Reminder

- **Managers:** Users who will receive the 'manager version' of the reminder.
- **Users:** Employees who must fill their timesheets and will receive the 'user reminder'.
- **Email Template - User:** Email template sent to employees who haven't completed their timesheets.
- **Email Template - Manager:** Email template sent to the selected managers.
- **Start week on:** Defines the first day of the work week (e.g., Monday). Used for correct weekly calculations.
- **Default capacity:** Expected weekly hours (e.g., 40 hours per week). Used to calculate % capacity in reminders.
- **Deadline day:** Day of the week by which timesheets must be completed (e.g., Thursday).
- **Deadline hour:** Exact time on the deadline day (e.g., 5:00 PM).
- **Reminders should be sent to:** Condition trigger.
 - Anyone who tracked less than X % of their capacity (e.g., less than 60 %).
 - Anyone who has not submitted their timesheet for approval (employees with unsubmitted timesheets get reminded regardless of hours logged)
- **Reminder should be sent:**
 - *Before deadline:* How many hours before the deadline the first reminder is sent (e.g., 1 hour before → Thursday 4:00 PM).

- *After deadline*: How many hours after the deadline a follow-up reminder is sent (e.g., 1 hour after → Thursday 6:00 PM).



Timesheets Reminder / Timesheet Reminder for Staff

Attachment(s) Action

Start Reminder

Draft Validated

Timesheet Reminder for Staff

Managers	Aaron Morales	Anna Brenton
Users	Name	E-mail
	Barbara Bram	barbara.bram@nuveraco.com
	Dennis Edward	dennis.edward@nuveraco.com
	Emily Sans	emily.sans@nuveraco.com
	Henry Felix	henry.felix@nuveraco.com

Start week on: Monday Email Template - User: Timesheet Reminder Email Template - User

Default capacity: 40 hours per week Email Template - Manager: Timesheet Reminder Email Template - Manager

Deadline day: Thursday Manager

Deadline hour: 5:00 PM Reminder should be sent:

Timesheet Deadline: Every Thursday at 5:00 PM Before deadline: 1 hours

Reminders should be sent to: Anyone who tracked less than 60% After deadline: 1 hours

Capacity Limit: 60% The reminders will be sent to your team before the timesheet deadline on **Thursday at 04:00 PM** and after the timesheet deadline on **Thursday at 06:00 PM**.

→ **Result in the example above:** Every Thursday at 4:00 PM and again at 6:00 PM, any staff member who has logged less than 60 % of their 40-hour week will automatically receive a gentle reminder email, and their managers (Aaron Morales & Anna Brenton) will be notified as well.

Critical Fields - Timesheets Journals

- **Partner:** Customer/Contact that the journal will be sent to.
- **Auto Approve After X Days:** If no action is taken, the journal is automatically approved X days after it is sent (e.g., 3 days).
- **Report:** Type of report generated from the journal.
- **Template:** Email template used when sending the journal to the client for approval.

Timesheets Journals / New

Save Discard

Send Now

Draft Sent Approved Rejected Invoiced

Name	AlpVision AG Timesheet Journal	Partner	AlpVision AG				
Report	Timesheet Entries	Template	Timesheet Journal Email				
Timesheets	Date	Employee	Description	Project	Task	Time (Hours)	Billable
	07/29/2025	Dennis Edward	Review and feedback	SO001 - IT Consultancy - Digital Strategy & Systems Optimization	[T0022] Review & Feedback Session	03:00	Billable
	07/25/2025	Barbara Bram	Strategy and draft optimization	SO001 - IT Consultancy - Digital Strategy & Systems Optimization	[T0021] Strategy Draft & Optimization Plan	20:00	Billable
	07/11/2025	Anna Brenton	Market and technology research	SO001 - IT Consultancy - Digital Strategy & Systems Optimization	[T0020] Market & Technology Research	10:00	Billable
	07/04/2025	Addison Anderson	Current system audit	SO001 - IT Consultancy - Digital Strategy & Systems Optimization	[T0019] Current System Audit	08:00	Billable
	Add an item					41:00	

Auto Approve After Days 3

→ To see an end-to-end project management in action, please refer to the following video:

[Synthesia video link]