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.

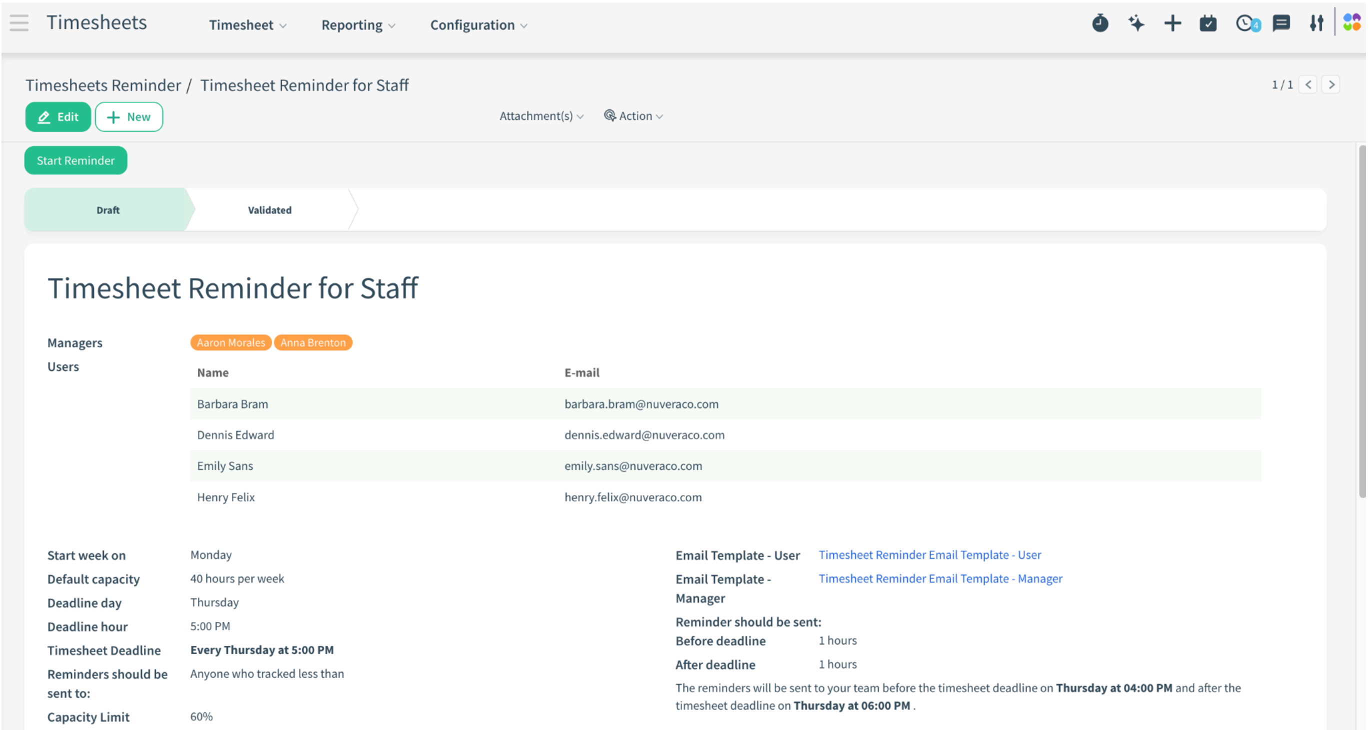
Critical Fields

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).

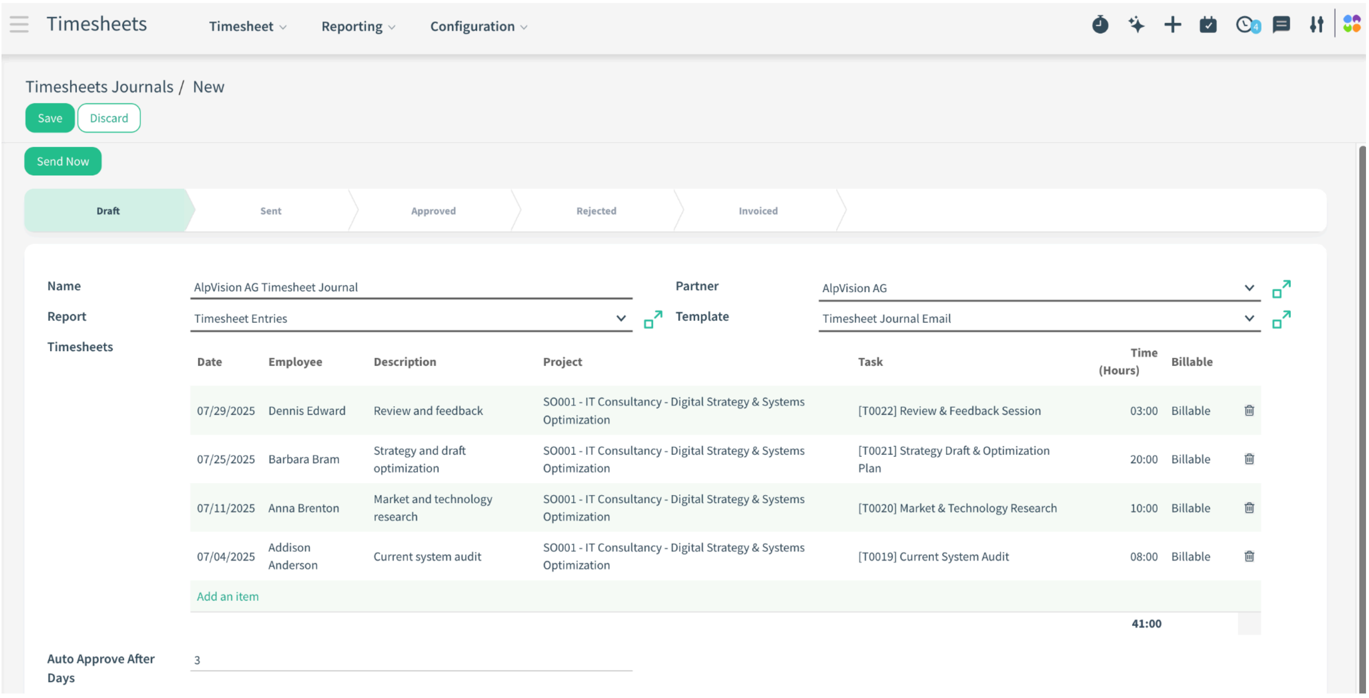
- *After deadline*: How many hours after the deadline a follow-up reminder is sent (e.g., 1 hour after → Thursday 6:00 PM).



➔ **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.



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

[Synthesia video linki]