

OFFICE TIMESHEETS

AI Enabled Data Telemetry

User's Guide

Lookout Software, LLC.

Contents

Overview	3
Activate the Data Telemetry Dashboard	3
Opting into AI Integration with the Data Telemetry Dashboard	4
Ways to launch the Data Telemetry Dashboard	5
The page at a glance	7
Tracking levels	7
Date range	8
Preset ranges	8
Custom range	8
Setting a default range	8
Filtering	9
Entity filters	9
Status filters	10
Applying or canceling	10
Templates and saved views	10
Loading a template	10
Save view	11
Ask Your Data	11
KPI tiles	12
Charts and visualizations	12
Quick Templates	13
URL state, bookmarking, and sharing	13
Tips and shortcuts	13

Overview

The OTS AI Enabled Data Telemetry Dashboard is your interactive view into the time and labor data captured by Office Timesheets. It surfaces hours, headcount metrics, distribution patterns, and approval status across whichever slice of your organization you care about — clients, projects, phases, tasks, pay codes, employees, or any combination — and lets you reshape that view in seconds. This guide walks through every section of the page and every control available to you, in roughly the order you'll encounter them from the top of the screen down.

The dashboard is designed so that nothing is hidden behind menus you have to memorize. Most of what you can do is visible as a button or chip on the page itself; the rest lives in pop-out panels you open by clicking those buttons. Every meaningful change you make is reflected in the page's URL, which means any view you build can be bookmarked, shared, or saved as a reusable template.

Activate the Data Telemetry Dashboard

To activate the Data Telemetry Dashboard, open each Security Policy you wish to give access to and navigate to the Interface area; and check the Dashboard AI Data Telemetry checkbox.

The screenshot shows the 'Security Policies' dialog box with the 'Interface' area selected. The 'Administrator' policy is active. The 'Interface' area contains two columns of settings: 'System Configuration' and 'Reports'. Both columns have a 'Yes' checkbox and a 'Start-up View' radio button. The 'Dashboard AI Data Telemetry' checkbox is checked, and a red arrow points to it.

System Configuration	Yes	Start-up View
Options	☒	☐
Time Entry Options	☒	☐
Company Info	☒	☐
E-mail Account	☒	☐
Auditing	☒	☐
Miscellaneous	☒	☐
Time Off Setup	☒	☐
Time Off Shifts	☒	☐
User Management	☒	☐
User Accounts	☒	☐
Change Password	☒	☐
Security Policies	☒	☐
Password Options	☒	☐
Welcome Email	☒	☐

Reports	Yes	Start-up View
Print	☒	☐
Report Options	☒	☐
Recalculate	☒	☐
View Criteria	☒	☐
Summary Report	☒	☐
New	☒	☐
Save The Current Template	☒	☐
Display Templates	☒	☐
Detail Report	☒	☐
Add Defaults	☒	☐
Detail Report Jobs	☒	☐
My Transaction Detail Reports	☒	☐
Dashboard AI Data Telemetry	☒	☐

Optionally, if you wish to launch the Data Telemetry Dashboard from the Office Timesheets Mobile app, navigate to the Mobile Menus Option, and check the Dashboard AI Data Telemetry checkbox.

The screenshot shows the 'Security Policies' configuration window. The 'Interface' tab is active. The 'Name' field is set to 'Administrator'. The 'Interface' section has several options checked: Templates, Payments, Adjustments, History, Statements, Contacts, Configuration, and Configuration. The 'Mobile Menu Options' section has several options checked: Add Time Entry by Task, Clock In, Timesheet View, Expense View, Employee Approval, Manager Approval, Request Time Off, My Accruals, My Time Off Req., View Emp. Accruals, Manage Time Off Req., Manage Time Off, Time Off Calculator, and Dashboard AI Data Telemetry. A red arrow points to the 'Dashboard AI Data Telemetry' checkbox, which is checked.

Click Save & Close to save your settings. All users effected by the security policy change will need to log out, and log back into Office Timesheets if currently logged in.

Opting into AI Integration with the Data Telemetry Dashboard

To connect your Office Timesheets On Demand Account's or On Premise installation's Office Timesheets AI Telemetry Dashboard to a large language model (LLM); an opt-in step is required.

To opt into using Office Timesheets' provided Ollama Cloud service using Gemma 4 LLM, navigate to System Configuration -> Options -> Miscellaneous and check the box "Use LLM supplied by Lookout Software"; and click the Save button in the LLM Agent (Ollama) area; and then click the Save button at the bottom-right corner of the Miscellaneous form.

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View Sheets Import / Export Reports Process Management Billing/Invoicing **System Configuration** Account Administration

Options User Accounts Change Password Accounts/Policies Welcome Email

Options User Management

Miscellaneous

Miscellaneous Setup

Time entry rate default
 Task rate default
 Default Holiday Group
 Address Level
 Company Level
 Default Employee Reporting Period
 TE for task require notes default
 Exclude task from exp sheet default
 Default Maximum Daily Hour Value for tasks: 0.00

Disable auto-redirect to mobile site
 Welcome Email checked by default
 Project Level (PAD)
 Activity Level (PAD)

Rounding options

☐ None
☐ Down
☒ Up
☐ Mathematically

Round to the nearest 15 minutes

Rounding expense options

☒ None ☐ Down ☐ Up

Cut or Copy and Paste Entries Rules

☒ Transfer Entry Statuses
☒ Transfer Approval Status
☒ Transfer Entry Rate

Inclusion/Exclusion employees by default

☒ Include All Employees in Element Level 1 by default
☒ Include All Employees in Element Level 2 by default
☒ Include All Employees in Element Level 3 by default
☒ Include All Employees in Element Level 4 by default
☒ Include All Employees in Element Level 5 by default
☒ Include All Employees in Element Level 6 by default
☒ Include All Employees in Element Level 7 by default
☒ Include All Employees in Element Level 8 by default
☒ Include All Employees in Element Level 9 by default
☒ Include All Employees in Element Level 10 by default

Search Options for Employee, Element Items and Expenses

☒ Active Search
☐ Executed Search

Web Api

☒ Enable Web Api
 Web Api Access Token lifetime 15 minutes (range: 5 - 1440)
 Web Api Refresh Token lifetime 7 days (range: 1 - 30)
 Web Api Key 8ecb0f5a91e24b42b46541bf4183e1d4 [Change](#)

LLM Agent (Ollama)

☒ Use LLM supplied by Lookout Software

[Save](#) [Say Hello](#)

Hello: I am ready to analyze your timesheet data. Please provide your data or let me know what specific metrics you need.

[Save](#)

Optionally, On Demand account admins can connect the AI Data Telemetry Dashboard to their own Ollama account and cloud LLM model by entering an API Key generated from their Ollama account in the Key field along with the cloud model they wish to connect in the Model field.

LLM Agent (Ollama)

☐ Use LLM supplied by Lookout Software

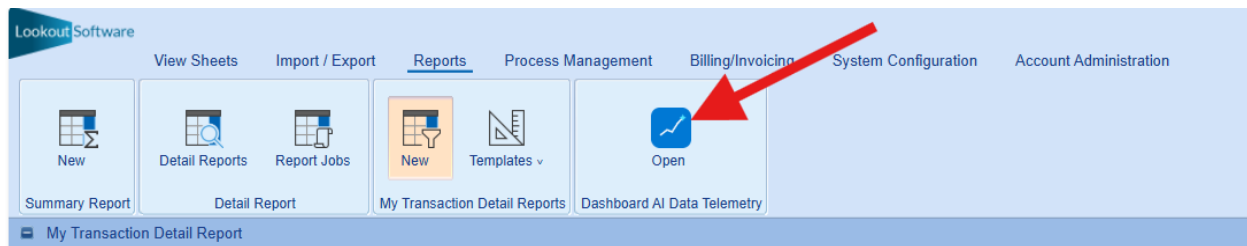
Key

Model

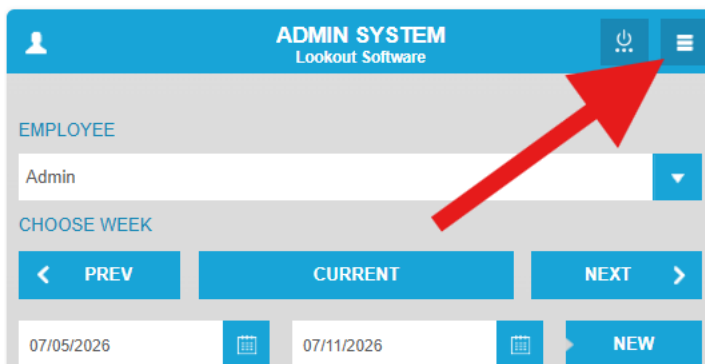
[Save](#) [Say Hello](#)

Ways to launch the Data Telemetry Dashboard

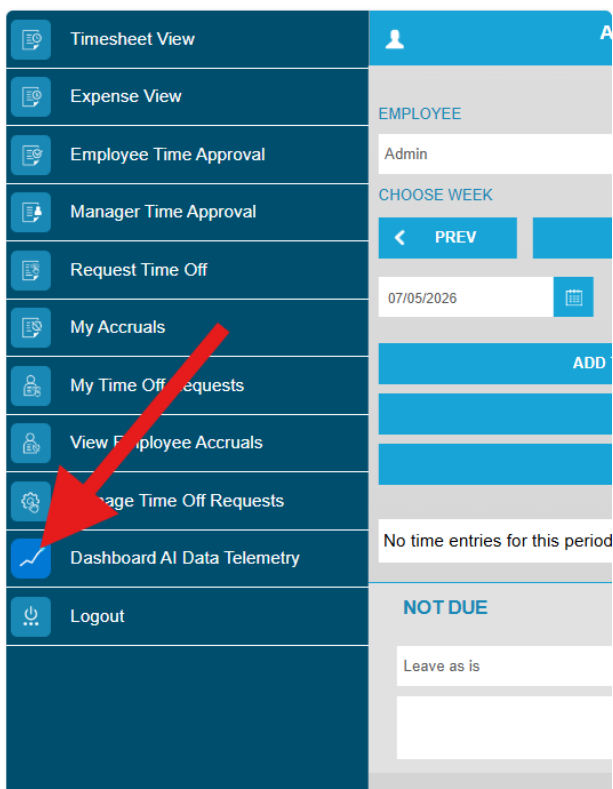
To launch the Data Telemetry Dashboard from inside of the main Office Timesheets application, navigate to the Reports tab; and click on the Open icon located in the Dashboard AI Data Telemetry area.



To launch the Data Telemetry Dashboard from inside of the Office Timesheets Mobile application, tap the menu icon...



And then tap the Dashboard AI Data Telemetry menu option...



The page at a glance

The dashboard is organized as a stack of horizontal strips followed by the main visualization area. At the very top sits the application header with the Office Timesheets branding and primary navigation. Beneath that is the controls area, which contains two strips: a tracking-levels strip showing your current data hierarchy, and a tools strip with the date range, filter, templates, and save buttons. Below the controls area is the Quick templates panel. Below the Quick template panel is the main content, beginning with a row of summary KPI tiles, followed by the larger visualizations: hours distribution, trend chart, and supporting breakdowns. Also displayed below the main content area the auto-generated AI data narrative panel "***Where effort is gong***" along with the **Ask Your Data** input panel.

The whole page is responsive. On wide screens you'll see the controls laid out in a single row with charts side-by-side. On narrower screens or smaller windows, the controls wrap to additional lines and the charts stack vertically, but every feature remains accessible — nothing is hidden or removed at smaller sizes.

Tracking levels

Across the top of the controls area you'll find the tracking-levels strip, marked with a stacked-layers icon and the label "Tracking levels." This strip displays a series of chips representing the current hierarchy your data is organized by, typically something like Client → Project → Phase → Task → Pay Code. The chips appear in order from broadest to most specific, separated by small arrow connectors.

Clicking a chip drills the view into that level: if you click the Project chip, for example, the dashboard re-aggregates so projects become the primary breakdown axis rather than clients. The chip you've drilled into is highlighted to indicate the current focus. To zoom back out, click a chip earlier in the hierarchy. Clicking the first chip returns you to the broadest view.

To the right of the chips, you'll see an "Edit order" button. Clicking this lets you reorder the hierarchy itself — for instance, if your reporting prefers Project as the top level rather than Client, you can drag the chips into the order that fits your workflow. You can also remove a defined level from view in the dashboard by clicking/pressing the visibility (eye) icon on the far-right side of each level row. The new order and element view settings persist for your account.

The chips wrap to additional lines automatically when more than will fit on one row, which is common after you've drilled into several levels. The line spacing is set so wrapped chips remain clearly separated and readable.

Date range

The date range button is the leftmost control in the tools strip. It always displays the currently active range — "Last 90 days" by default, or whatever range you've chosen most recently. Clicking the button opens the range picker.

Preset ranges

The picker shows ten preset options stacked vertically: Today, Yesterday, This week, Last week, This month, Last month, Last 90 days, Year to date, Last year, and Custom. The presets that span a current period (This week, This month, Year to date) include data from the start of that period up to today. The "last" presets (Last week, Last month, Last 90 days, Last year) refer to the most recent complete period ending today. "This week" treats Monday as the first day of the week, matching the standard Office Timesheets calendar.

To apply a preset, click its name. The picker closes and the dashboard immediately reloads with the new range. The button label updates to reflect your choice.

Custom range

To pick a specific start and end date, click Custom. A two-month calendar panel opens beneath the presets. Click any day to set the start date; click a second day to set the end. The selected range is highlighted across both calendars, and a date summary at the bottom shows what you've picked. Click Apply to confirm or Cancel to dismiss without changes.

The custom range supports up to two years of history, and future dates are allowed if you need to project forward or compare with planned periods. On wider screens both months show side-by-side; on narrower screens or smaller windows they stack vertically so the picker always fits.

Setting a default range

A new column labeled "Default" runs down the right edge of the preset list, with one radio button per preset. The radio for your currently saved default range is filled; the others are empty. To make a preset your default, click its radio button. The dashboard remembers this choice for your user account, and any future fresh visit to the dashboard will open with that range pre-applied.

The Custom radio behaves a bit differently: it's only enabled when you currently have a custom range active. If you'd like to set a specific custom date range as your default, pick the dates first using the Custom preset, then click the Custom radio.

Your saved default is applied on fresh dashboard loads but does not override two situations: when you've loaded the dashboard from a saved template (the template's range wins), and when the URL you opened explicitly carried a date range (a bookmark you'd saved, for instance). This precedence keeps bookmarks and templates predictable.

Filtering

The Filter button sits to the right of the date range button, marked with a funnel icon. Its label shows the number of currently active filters; when no filters are set it reads simply "Filter." Clicking the button opens the filter pop-out, which is the most feature-dense panel in the dashboard. It's organized into sections, each addressing a different dimension of your data.

Entity filters

The first set of sections lets you restrict the view to specific people or projects:

The **Employees** section lists every employee in the system with a checkbox. Type into the search box at the top to narrow the list. Check any number of employees to limit the dashboard to entries by those people. The count beside each name shows their hours in the currently active date range, giving you quick context for who's been busy.

The **Employee groups** section works the same way for groups defined in Office Timesheets — departments, teams, regions, or whatever taxonomy your installation uses. Checking a group includes all its members.

The **Elements** section is more nuanced because Office Timesheets supports multiple tracking levels (Client, Project, Phase, Task, and any custom ones). The section is split into sub-tabs for each level, letting you pick specific clients, projects, phases, etc. The selections you make here combine with the tracking-levels strip at the top of the page: drilling into Phase at the top, then filtering to two specific phases here, narrows the view to just those phases' data.

The **Element groups** section gives you the same multi-level structure for groups of elements (for instance, a group called "Strategic projects" containing several individual projects).

Selections within a section combine with OR (any of these); selections across sections combine with AND (matches all of these criteria).

Status filters

Beneath the entity filters are four additional sections covering the various status dimensions a task and/or time entry can have:

Task statuses — For each task-level status defined in your installation (Complete, Billable, PTO, and any other custom ones), you'll see a dropdown with three choices: Ignore (don't filter on this), Checked (tasks where this status is checked), and Unchecked (tasks where it's not). Setting a status to Ignore means it has no effect; it's the default.

Entry statuses — Similar dropdowns for entry-level statuses such as Billable, Taxable, etc..

Entry list statuses — For each entry list defined in your installation, a dropdown shows all available options for that list. For example, an entry list called "Region" might offer Ignore, {No selection}, North, South, East, and West. Selecting a specific option restricts the view to entries flagged with that list value.

Approval status — A single dropdown for the time entry approval workflow: Ignore, No time sheet status, Submitted, Approved, Rejected, or Resubmitted.

These status filters are sent to the server as part of every refresh and let you ask questions like "what fraction of last month's PTO hours are still unapproved?" or "show only the billable entries assigned to the East region."

Applying or canceling

At the bottom of the filter pop-out sit Apply and Cancel buttons. Changes inside the pop-out are not committed until you click Apply — you can experiment freely and back out if you change your mind. The Clear all link resets every section to its empty/Ignore default.

When you Apply, the page refreshes with your new criteria, and the filter button's label updates to reflect the number of active filters. Active entity filters also appear as colored tags directly on the dashboard near the controls strip, so you can see at a glance what's narrowing your view.

Templates and saved views

The Templates button, beside the Filter button, opens a panel listing every saved view available to you. Each template is shown as a card with its name, a description, and a small preview of what the template captures.

Loading a template

Click any card to load that view. The dashboard navigates to a URL that encodes the template's state, and every part of the page — tracking levels, drill positions, date range, entity filters, status filters, even the chart-axis preferences — updates to match. The template's date range overrides your saved default range; the template's filters replace whatever filters you had set; your tracking-levels drill position resets to what the template captured.

Save view

To the right of the Templates button is the Save view button, which captures your current dashboard state as a new template. Clicking/tapping it opens the Save view dialog.

The dialog asks for a name and a description, then shows a "What this captures" preview listing exactly what the saved template will include. You'll see entries for Page, Top view, Lower view, People view, Filter, Status filters, Date range, and a shareable URL. Each entry shows the current value as colored tags so you can verify the template captures what you intended. Entity filters appear as one tag per active filter; status filters appear as amber tags showing each non-default selection (for example, "PTO: Checked" or "Approval: Approved"). Anything not actively set shows as "None" rather than being omitted, so you can confirm at a glance.

Click Save to persist the template. It appears in the Templates panel and in the Quick Templates panel (if your installation displays one), available immediately for you and any colleagues with permission to see it.

Ask Your Data

If your installation has the Ask Your Data feature enabled, you'll see a search-style input near the top of the main content area, labeled "Ask your data" or similar. This is a natural-language interface to the same data the rest of the dashboard shows.

You can type questions in plain English: "How many billable hours did Sarah Johnson log last month?" or "Which client used the most consulting hours this quarter?" or "Show me PTO trends for the engineering team over the past year." The system parses your question, identifies the entities you mentioned (employee names, project names, status types), figures out what kind of answer makes sense (a single number, a ranking, a trend, a comparison, a composition breakdown), and returns a formatted result inline.

Below the input you may see a few starter suggestions — example questions that work well — to give you a sense of what's possible. Clicking a suggestion runs it immediately.

The system is forgiving about how you phrase names. "Mike" will match "Michael Anderson"; "the Acme project" will match "Acme Corporation - Q4 Migration" if there's only one project that fits. When a name is genuinely ambiguous — you say "Acme" and there are three projects matching — the system asks you to choose between candidates rather than guessing.

If a question references something the system can't find at all, or if it's outside what the data can answer, you'll get a polite explanation rather than a wrong answer. For example, asking about a future quarter outside your date range returns a note explaining the range mismatch and suggesting how to adjust.

The Ask feature inherits the entity filters and date range you've set on the dashboard. If you've already filtered to one client, "show top employees" returns top employees within that client. This means you can use the dashboard's controls to set context, then use Ask Your Data to dig into specifics without restating the context every time.

KPI tiles

The first content block beneath the controls is a row of summary KPI tiles. These give you a fast snapshot of the most important metrics for whatever slice you've configured: total hours, largest hours concentration, number of active employees, and average hours per employee.

The tiles refresh whenever you change any control, so they always reflect the currently filtered, ranged, and drilled view. They're the easiest place to spot a directional change — if total hours dropped 20% from the previous period while headcount stayed flat, that's visible on the tiles before you investigate further.

Charts and visualizations

Below the KPIs sits the main charting area. The exact charts vary slightly depending on your tracking-level configuration and the active drill position, but several are universal:

The **Hours distribution** chart shows a horizontal bar breakdown of hours by whatever the current "View by" dimension is. A small "View by" dropdown above the chart lets you switch between alternatives — for example, hours by Client, hours by Project, hours by Phase. Switching the View by doesn't change the underlying filters; it changes only how the visible bar chart groups its data.

The **Trend chart** plots hours over the date range you've selected, with a granularity that adapts to the range (daily for short ranges like This week, weekly for medium ranges like Last 90 days,

monthly for longer ranges like Year to date). For very wide ranges, the granularity may default to weekly to keep the chart legible.

Hovering over any chart element typically reveals a tooltip with the precise number, the category name, and a percentage value where relevant.

Quick Templates

Quick Templates panel appears near the main content area, separate from the full Templates panel. Quick Templates are a curated handful of common views — set up by your administrator — that load with a single click. Quick Templates are read-only for most users: you can use them as starting points and save your own variations through the Save view dialog, but the originals stay as your team's canonical reference views.

URL state, bookmarking, and sharing

Every meaningful change you make on the dashboard updates the page's URL. The URL encodes your active tracking-level drill, your date range, your entity filters, your status filters, and your view orientation. This has three practical consequences:

You can **bookmark any view** with your browser's bookmark feature, and the bookmark will restore that exact view next time you click it.

You can **share a view by URL**. Copy the address bar and send it to a colleague; when they open it, their dashboard shows the same view you set up — assuming they have permission to see the underlying data. Date ranges encoded as presets (today, this week, etc.) are dynamic by definition, so a bookmark of "This week" will always show the current week; a bookmark of a Custom range stays pinned to specific dates.

You can **refresh the page** without losing your work. The URL is the source of truth, so a refresh restores whatever you had set.

Templates use the same URL state under the hood: saving a template captures the URL, and loading a template navigates to the captured URL. There's no separate save path for "template-only" state — what's in the URL is what gets saved and loaded.

Tips and shortcuts

A few useful patterns that aren't immediately obvious:

To **reset to a clean default view**, navigate to the dashboard URL with no query parameters (e.g., the plain [/Dashboard](#) path). The dashboard will apply your saved default range and clear any filters or drill positions.

To **compare two views side-by-side**, open the second view in a separate browser tab or window before changing the first. Each tab has its own URL state and won't interfere with the other.

To **see all hours regardless of status**, leave every status filter section at Ignore. This is the default and matches the broadest possible query.

To **find a specific employee or project quickly** when there are many, use the search box at the top of each filter section rather than scrolling. The search matches partial names and is case-insensitive.

To **switch templates without losing your current filters**, you can't — loading a template replaces your current state entirely. If you want to overlay filters on top of a template's base view, load the template first, then apply your additional filters.