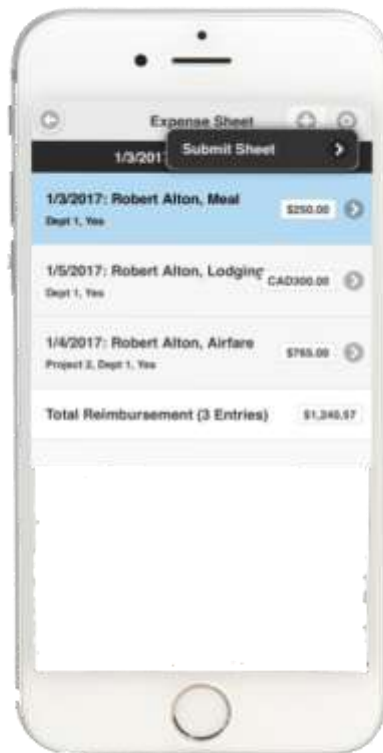


Pacific Timesheet Mobile Primer: A Beginner's Guide to Mobile Time & Expense Sheets

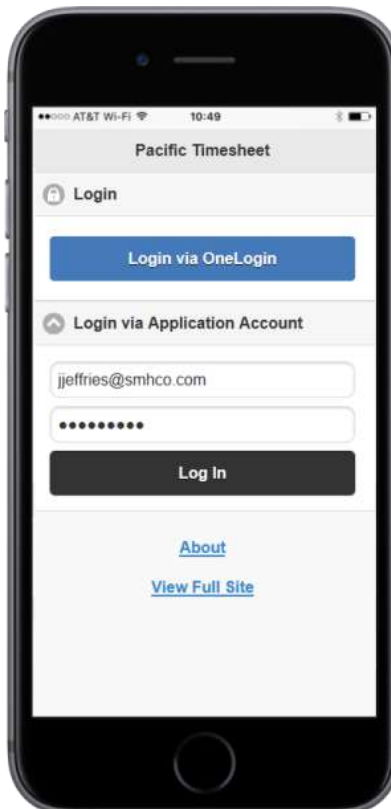


Pacific Timesheet has been used by hundreds of thousands of users for years on the laptops and desktops. But Pacific Timesheet Mobile is becoming more important every day. According to Mobile Business Insights in 2016:

1. 80% of email users are forecasted to check email by their mobile devices in 2018 (emailmonday).
2. Average users check their mobile devices 46 times a day (App Annie).
3. Half of all people pick up their smartphones when they wake up (ExpressPigeon).

Our customer research tells us that their users, particularly those in the field or traveling, are using Pacific Timesheet Mobile a majority of the time.

We thought it was high time for a definitive primer on Pacific Timesheet Mobile features:



Mobile Timesheets

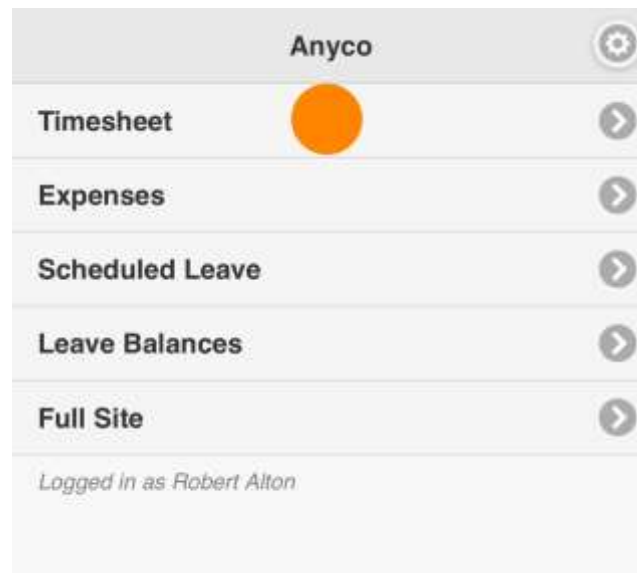
Mobile applications have required a complete re-thinking of interface design. This means flatter, simpler design, faster load times, fewer and more intuitive sets of interface options. Where there use to be three buttons, there is now one.

Accessing Pacific Timesheet Mobile is easy, with no need to download or update an app. Just open a browser on your mobile device (e.g. iPhone or Android) enter your system URL, and save it to your favorites for next time.

On the login page, enter your login name and password, and you're in. If you have single sign on, and you're already on your company network, just enter the URL and you'll end up on the main mobile dashboard shown below.

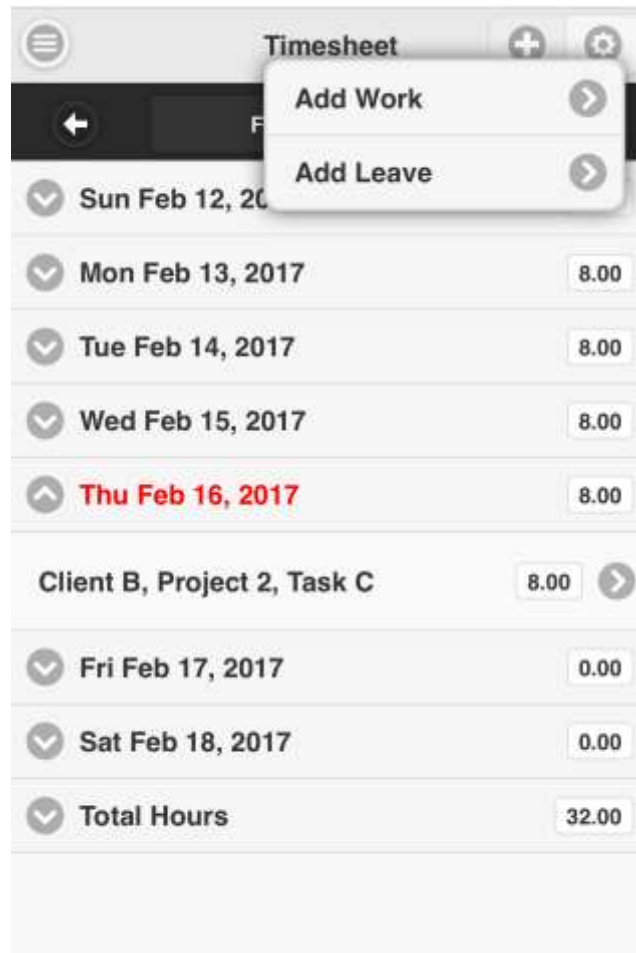
From here, you can reach anything you need with one or two taps.

Tap Timesheet to show your main timesheet page:



Note that the application opens with today's Day/Date in red.

Tap the plus (+) button on the upper right to add a work or leave time entry.



For example, when you add a Work Entry you will be taken to a work entry details screen that looks like this:

The screenshot shows a mobile application interface for entering work time. At the top, there is a header bar with a 'Cancel' button on the left, the title 'Work Entry' in the center, a green circular indicator, and an 'OK' button on the right. Below the header, there are several form fields: 'Date:' with a dropdown menu showing 'Thu Feb 16, 2017'; 'Hours:' with a text input field containing '8.00'; 'Client:' with a dropdown menu; 'Project:' with a dropdown menu that is currently open, displaying a list with 'Project 2' highlighted in blue, 'Project 1', and a 'Search...' option; 'Task:' with a dropdown menu; and 'Notes:' with a text area. The 'Search...' option in the Project dropdown is highlighted, indicating it is the active selection.

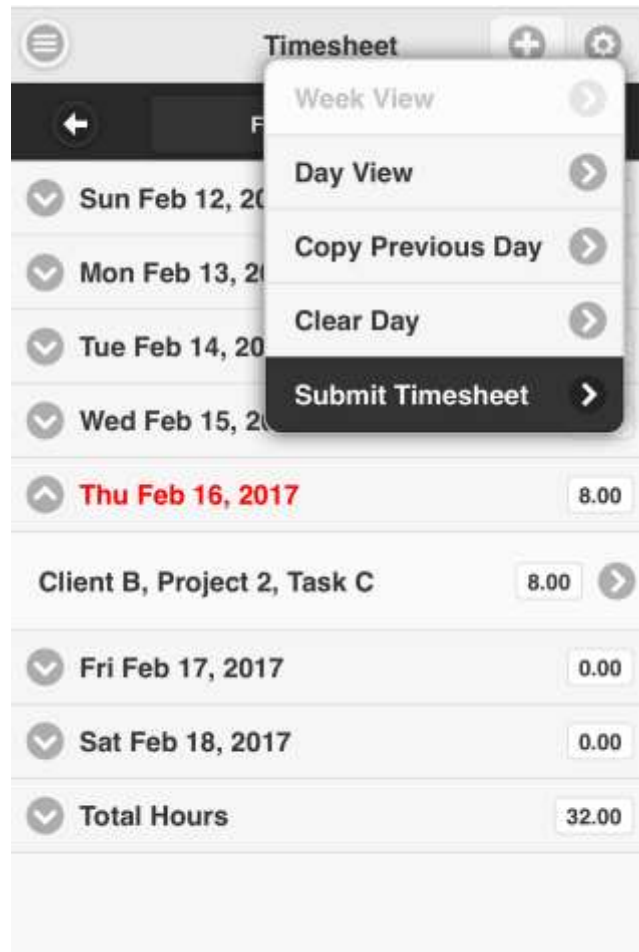
Edit the time entry's details like total hours, select work items like projects and tasks, and add detailed notes. If you have an Attendance Timesheet, tap the green button to start a time entry timer.

You can search for projects, tasks or other work items by tapping on search and typing into the search box. A filtered list of work items will be returned as you type. To select, tap its name, and you will be returned to the time entry details page.

The screenshot shows a mobile application interface for searching projects. At the top, there is a header bar with a 'Back' button on the left and the title 'Projects' in the center. Below the header, there is a search bar with a magnifying glass icon on the left, the text 'Project 2' in the center, and a close button (an 'X' in a circle) on the right. Below the search bar, there is a list of search results. The first result is 'Project 2', which is highlighted in a light gray background.

When your time entry is complete, tap "Okay" and you'll be returned to the Timesheet page.








Tap the gear icon in the upper right to move back and forth between the "Week View" and "Day View." As with the laptop/desktop application, the system remembers your last view of your timesheet. You can also Copy Previous Day entries or delete the current day's entries using Clear Day.








When your Timesheet is complete, just tap Submit Timesheet and tell your manager it's ready for approval.

Checking Mobile Leave Balances

From the main page, tap Leave Balances to check what leave you have today.

Anyco		
Timesheet		
Expenses		
Scheduled Leave		
Leave Balances		
Full Site		
<i>Logged in as Robert Alton</i>		



	Balances	
Comp Time	0.00 Days (0.00 Hrs)	
Sick	0.00 Days (0.00 Hrs)	
Vacation	13.50 Days (108.00 Hrs)	 
<i>Balances As Of 2/16/2017</i>		



Vacation History	
Date	1/31/2017
Change (Hrs)	12.0000
Balance (Hrs)	108.00
Balance (Days)	13.50
Comment	Monthly accrual as per policy "01 - Exempt Policy". Accrual is 12.0000 hours (employed 8.085 years).
Date	12/31/2016
Change (Hrs)	96.0000
Balance (Hrs)	96.00
Balance (Days)	12.00

Mobile Leave Requests

Tap "Schedule Leave" to request leave . You're leave request form will look like this:

The image shows a mobile application interface for creating a new request. At the top, there is a header bar with a 'Cancel' button on the left, the title 'New Request' in the center, and an 'OK' button on the right. Below the header, the form is organized into sections separated by horizontal lines. The first section is labeled 'Type:' and contains a dropdown menu. The dropdown menu is currently open, showing two options: 'Comp Time' (highlighted with a blue background) and 'Vacation'. Below the 'Type:' section is a 'From:' field with a date picker set to 'Feb 16, 2017'. The next section is labeled 'To:' and also has a date picker set to 'Feb 16, 2017'. Below that is a 'Partial Day:' section with a toggle switch and the text 'No'. The 'Total Time:' section shows a text field containing '1.00 Days (8.00 Hours)'. Finally, there is a 'Description:' section with an empty text input field.

Tap the picklist to select the leave type you want to use for your request. Then pick the start and finish dates of your request. When you submit your request, the system will check your available future leave. If you don't have enough, you'll get an error message:

Request	
<p>✘ Insufficient balance! The ending balance for this request is below the minimum of 0.00 hours.</p>	
Type:	Vacation
From:	Mon Apr 3, 2017
To:	Tue Apr 25, 2017
Total Time:	17.00 Days (136.00 Hours)
Status:	Pending approval since 3/6/2017 10:12PM
Vacation Balance	
Starting Bal:	16.50 Days (132.00 Hours)
Ending Bal:	-0.50 Days (-4.00 Hours)
Current Bal:	15.00 Days (120.00 Hours)

In this case, the form shows a forecast of your total future balance on start date of the leave request. The system automatically calculates everything for you using this formula:

your current balance

PLUS

your future accruals

LESS

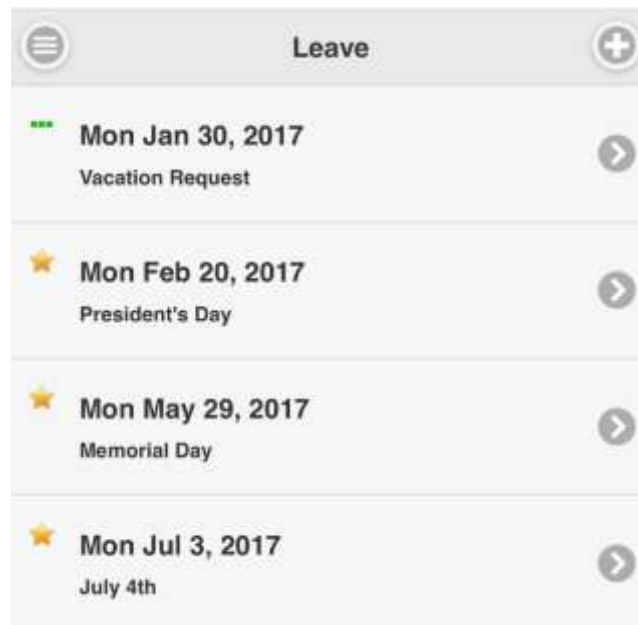
your future approved leave

EQUALS

your future starting balance

Leave Approvals & Rejections

When your manager approves your leave request, you will receive an email notice that might include an approval message from your manager. You can also tap Scheduled Leave to view your upcoming leave, including approved leave.



The green dots shows that a vacation request is still pending. Once approved, the dots will become a green check mark. A rejected request will show up with a red X.

Expense Reports and Mobile Expense Sheets

To create an Expense Sheet or report, tap Expenses and the (+) Plus button, which take you to an expense sheet page. For a new Expense Sheet, complete all the key fields, including the expense sheet Description, start and finish dates. The system will also generate a unique Expense Sheet ID.

Cancel **New Expense Sh...** OK

Description:
Chicago Client A trip

Date:
Feb 21, 2017

To
Feb 23, 2017

Notes:

ID:
0000002301

After you create expense sheets, your Exense Sheets page will start to list your expense reports.

Expense Sheets	
1/3/2017 NY Client B Trip	\$1,240.57 >
9/12/2016 - 9/16/2016 Trip to New York for customer a	\$530.87 >

From the main page for your new Expense Sheet, tap the (+) Plus button to create each expense entries. You can set the expense date, select the

expense type, type a description and select the expense currency. You can also select and code any expense by Client or Project.



Expense Entry

Cancel OK

Date: Jan 5, 201

Expense: Lodging Meal

Description: Search...

Amount (CAD): 300.00

Currency: CAD

Receipt Image:

Scroll down the page to attach a receipt image.



The image shows a mobile application interface for an "Expense Entry" form. At the top, there are three buttons: "Cancel" on the left, "Expense Entry" in the center, and "OK" on the right. Below the title bar, there are four main sections:

- Description:** A text input field.
- Amount (USD):** A text input field containing the value "250.00".
- Currency:** A dropdown menu currently set to "USD".
- Receipt Image:** A section with a "Choose File" button and the text "no file selected".

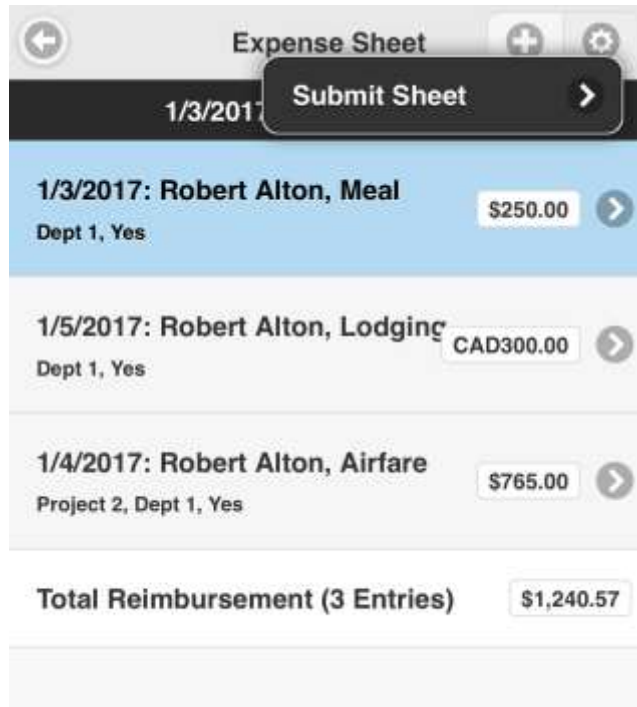
Below these sections is a white overlay menu with three options:

- Take Photo or Video** with a camera icon.
- Photo Library** with a photo gallery icon.
- More** with a three-dot menu icon.

At the bottom of the overlay is a large white button with the text "Cancel" in blue.

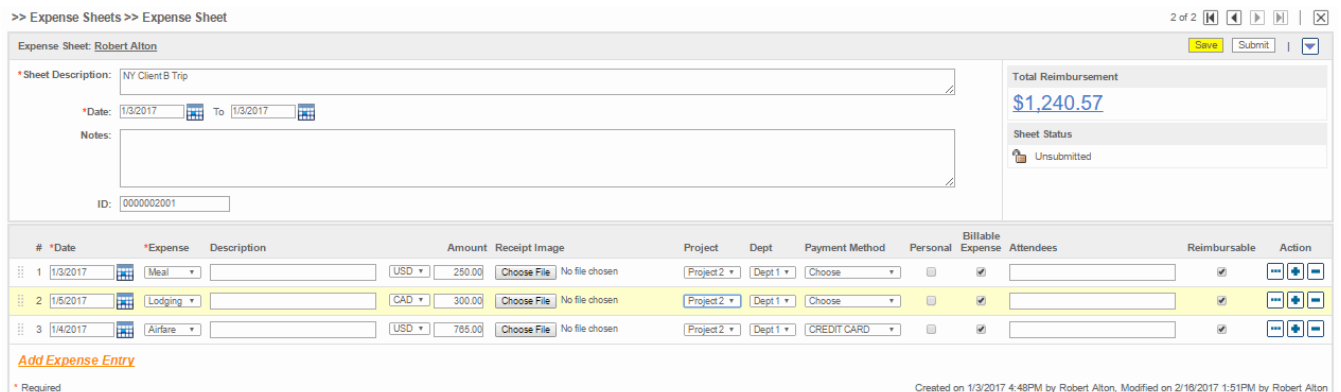
After completing the Expense Sheet, you can view each entry and their details. Note that expense entries will display in the expense currency, and your reimbursement amount will be shown in your reimbursement currency. When you're done, submit your Expense Sheet for approval.





After submitting your Expense Sheet, your approver receives an automated email notice. When your approver rejects or approves your Expense Sheet, you will receive an email notice.

You can enter your expenses using your mobile device or on your laptop or desktop computers.



Pacific Timesheet Mobile is becoming more popular with users, and over time Pacific Timesheet will continue to add mobile features. Let us know what more you'd like to see in the comments section below or contact your customer relationship manager or [Pacific Timesheet Support](#).