

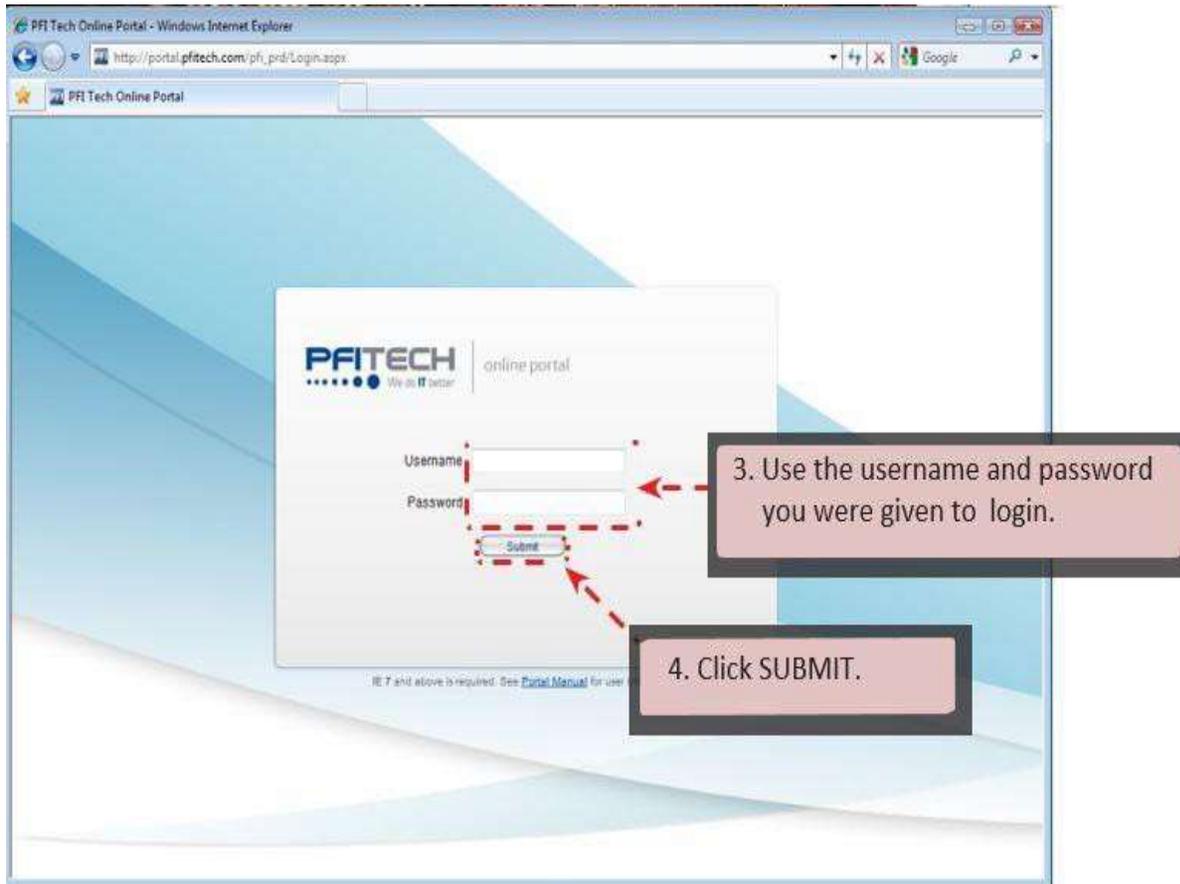
+ Quick Reference Guide

Time and Expense



Portal Access

1. Go to [Portal.pfitech.com](http://portal.pfitech.com) or your employer's website.



PFI Recommends using Google Chrome for best performance, IE9 and above is also supported.

- If you have login issue, send an email to: support@pfitech.com

Time Entry

- Each week you will be required to submit a timesheet for worked hours prior to weekly deadline **(Sunday 11:59 PM PST)**. After log in, the homepage will display. Homepage displays announcements and important information.

The screenshot shows the PFITECH online portal homepage. At the top left is the PFITECH logo with the tagline "We do IT better". To its right is the text "online portal". Below this is a dark blue navigation bar with the following menu items: Home, Organization (with a dropdown arrow), Accounting (with a dropdown arrow), HR, Employee (with a dropdown arrow), Payroll (with a dropdown arrow), Supervisor (with a dropdown arrow), Recruiting, Assets, Benefits, and Help Desk (with a dropdown arrow). Below the navigation bar, the user is greeted with "Hi! Orianna Pacchioni". To the left of the main content area is a "Department Contacts" sidebar with a "View Department Contacts" link. The main content area features a "Timesheet Notice" section with two bullet points: "- Use the links to the left to enter time and expense." and "- Access employee forms and instructions under RESOURCES tab." Below this is an "Announcements" section, which is currently empty. Further down, there is a red heading "ACCESS PFI EMAIL" followed by a bullet point with the URL "https://mail.pfitech.com". At the bottom, there is another red heading "PFI EMAIL AND PORTAL MAINTENANCE" followed by the text: "PFI email and portal have a maintenance window every weekend from Saturday 8pm PST through Sunday 2am PST. During this time I unavailable."

TimeEntry – cont.

- Select “Add Task”

Home Organization Accounting HR Employee Payroll Supervisor Recruiting Assets Benefits Help Desk Orianna Pacchioni Logout

Time Sheet

Week of 3/13/2017 to 3/19/2017 Today is 3/13/2017 Submit due: Sunday 3/19/2017 11:59pm

Add Task Add Time-Off Add Expenses Add Comments

Account	Site	Project	Position	Task	Mon 3/13/17	Tue 3/14/17	Wed 3/15/17	Thu 3/16/17	Fri 3/17/17	Sat 3/18/17	Sun 3/19/17	Subtotal
				Daily Totals:	0	0	0	0	0	0	0	0

Previous Week

Total Hours 0 Regular 0 Overtime 0 Double Time 0 Time-Off 0 Total Expenses 0

Approver: Tony Galindo

Submit Time & Expense

Home Organization Accounting HR Employee Payroll Supervisor Recruiting Assets Benefits Help Desk Orianna Pacchioni Logout

Task for week of Mon 3/13/17 to Sun 3/19/17

Account: Select Account

Account Project: Select Account Project

Site: Select Site

Position: Select Position

Task: [Empty dropdown]

NOTE: All fields must be entered prior to selecting "Save or Save & Add Another"

Mon 3/13/17 Tue 3/14/17 Wed 3/15/17 Thu 3/16/17 Fri 3/17/17 Sat 3/18/17 Sun 3/19/17

Save Save and Add Another Cancel

- Saved View

Home Organization Accounting HR Employee Payroll Supervisor Recruiting Assets Benefits Help Desk Orianna Pacchioni Logout

Time Sheet

Week of **3/13/2017** to **3/19/2017** Today is 3/13/2017 Submit due: **Sunday 3/19/2017 11:59pm**

[Add Task](#)
[Add Time-Off](#)
[Add Expenses](#)
[Add Comments](#)

	Account	Site	Project	Position	Task	Mon 3/13/17	Tue 3/14/17	Wed 3/15/17	Thu 3/16/17	Fri 3/17/17	Sat 3/18/17	Sun 3/19/17	Subtotal
	PFI	HQ	Administration	Administrator	Admin	8	8	8	8	8	0	0	40
					Daily Totals:	8	8	8	8	8	0	0	40

[Previous Week](#)

Total Hours 40 **Regular** 40 **Overtime** 0 **Double Time** 0 **Time-Off** 0 **Total Expenses** 0
 [Approver: Tony Galindo](#)

[Submit Time & Expense](#)

- **NOTES:**

- ❖ Hours can be revised any time prior to submittal.
- ❖ All overtime must be pre-approved. Comments are required for overtime justification (Reason for OT plus Name of Approver).
- ❖ Timesheet must be "saved" prior to changing account/site.
- ❖ When entering multiple accounts/sites, a new timesheet will be generated. Weekly totals will compute on the backend.
- ❖ If adding time on multiple accounts/sites, enter "Time-Off" hours under primary account.
- ❖ Once a timesheet is submitted, an email confirmation will be sent to both employee and supervisor.

Expense Entry

- After selecting “Add Expense” (see previous screenshot) complete all dropdown options.

Expense

Add/Edit Expense

Account: PFI

Account Project: Administration

Site: HQ

Description: Ticket# 213 - El Segundo CA O.D.O: 20,213/20,220

Expense Type: Mileage

Subexpense: .535

Expense Date: 03/13/2017

Amount: [Empty]

Quantity: 10

Billable:

Receipt Image: 27.00.docx (Choose File)

Save Cancel

NOTE: All fields must be entered prior to selecting "Save"
All expenses must have an attachment & proper description

- **NOTES:**

- ❖ All expenses must have a valid receipt except for mileage.
- ❖ Include detailed descriptions on all expense.
- ❖ The following attachment types are accepted. Keep in mind there a 10MB upload limit per-attachment.
 - DOCX or XLSX (Microsoft Word & Excel 2007 and up)
 - PDF (Adobe Acrobat)
 - TXT or CSV (Standard Text file)
 - JPG or GIF (Standard Photo formats)



Click CANCEL button at any time to cancel out the action.

Final Time & Expense Review

Time Sheet

Week of 3/13/2017 to 3/19/2017 Today is 3/13/2017 Submit due: Sunday 3/19/2017 11:59pm

Add Task Add Time-Off Add Expenses Add Comments

	Account	Site	Project	Position	Task	Mon 3/13/17	Tue 3/14/17	Wed 3/15/17	Thu 3/16/17	Fri 3/17/17	Sat 3/18/17	Sun 3/19/17	Subtotal
	PFI	HQ	Administration	Administrator	Admin	8	8	8	8	8	0	0	40
					Daily Totals:	8	8	8	8	8	0	0	40

Previous Week

Total Hours 40 Regular 40 Overtime 0 Double Time 0 Time-Off 0 Total Expenses \$5.35

Approver: Tony Galindo

Submit Time & Expense

Expenses

Show 50 entries

Search:

	Account	Site	Date	Expense Type	Quantity	Amount	Billable	Description	Approved
	PFI Administration	HQ	03/13/2017	Mileage	10	\$5.35	No	Ticket# 213 - El Segundo CA O.D.O: 20,213/20,220	No
					Total:	\$5.35			

Showing 1 to 1 of 1 entries

Previous 1 Next

NOTES:

- ❖ Review entire timesheet prior to submitting.
- ❖ If you have any questions, click on blue "Approver: Name" box to email your supervisor.
- ❖ Selecting "Save & Submit" will submit all time entry's and expense entered. This should be the last step after ensuring accuracy.

- Company Contact Information

Resources > Department Contact

Phone Numbers and Emails	
Computer/Phone/PFI Email account problems	it@pfitech.com
Portal/Timesheet System Errors	support@pfitech.com
Human Resources questions	hr@pfitech.com
Payroll/Accounting questions	accounting@pfitech.com
Sales question	sales@pfitech.com
Available/Referral jobs	jobs@pfitech.com
Headquarter phone number	310-824-1800
Headquarter fax number	310-824-1809

