

+ Portal Manual

portal.pfitech.com/manual



Portal Access

1. Go to www.pfitech.com or your employer's website.

2. Click the STAFF SELF-MANAGEMENT or PORTAL LOGIN button.

(The Portal homepage opened in a new window. It might be opened in a new tab, depends on your browser settings)

3. Use the username and password you were given to login.

4. Click SUBMIT.



➔ **IE 6** and above is required to access the Portal

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

Time and Expense Entry

Time Entry

1. Log into the Portal through www.pfitech.com or your employer's website (see previous section). After log in, a welcome page prompts up. **NOTE:** When entering time to multiple accounts, you must enter time, comment and expense(s) to each account prior to adding second account task line.

2. Click on a site of an account that you want to add hours to. (Accounts and sites are pre-assigned. You might have multiple accounts or sites)

3. Click ADD TASK to populate a "task row".

(A blank timesheet pops up)

Account	Task	Thu 11/24/11	Fri 11/25/11	Sat 11/26/11	Sun 11/27/11	Mon 11/28/11	Tue 11/29/11	Wed 11/30/11	Subtotal	Edit	Delete
Web Designer / Developer	Development	8	8	0	0	8	8	8		Save	Cancel

Daily Totals: _____

Prev Week

Total hours: 0 Regular: 0 Overtime: 0 Time-off: 0

Approver: Tony Galindo




Two numbers appeared on the upper right corner indicate your available vacation and sick hours. These two numbers are only updated/changed when your submitted timesheet is approved.

4. Select a position first.

5. Then select a task.

6. In the blue-border boxes, enter hours of each day for that task.

7. When finish, click SAVE.

 Use only decimals to enter hours. For example, if you want to enter "6:30", enter "6.50" instead. Try making every 15 minutes as 1 unit, so you'll only have to enter ".00", ".25", ".50", or ".75".

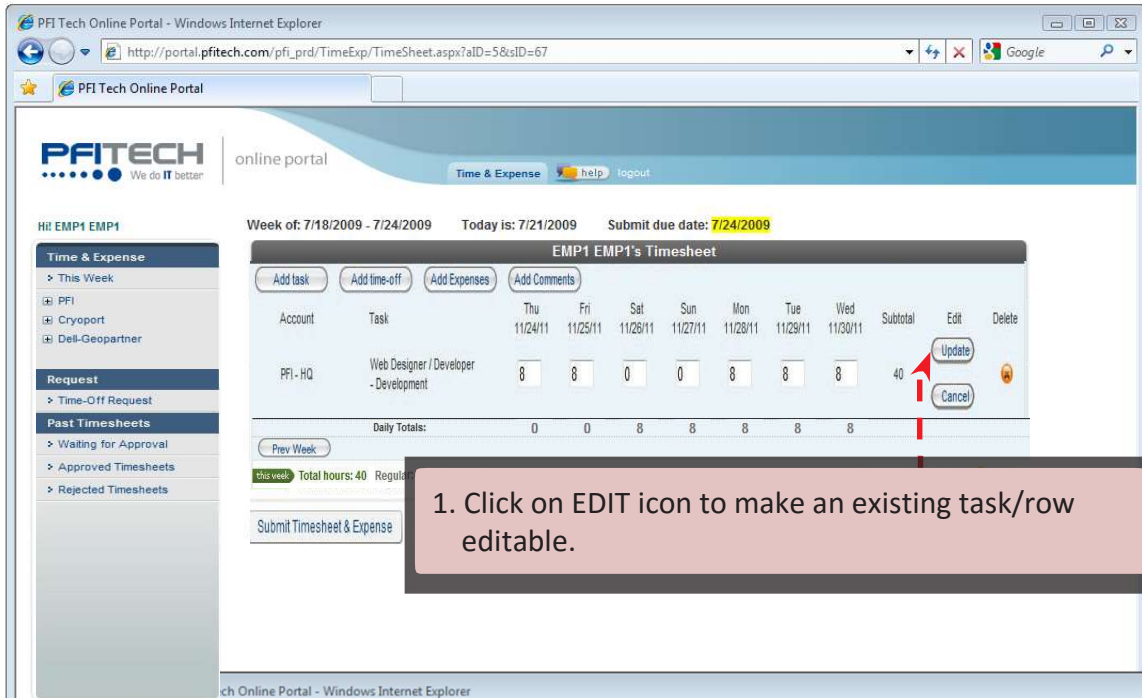


Click CANCEL button at any time to cancel out the action.

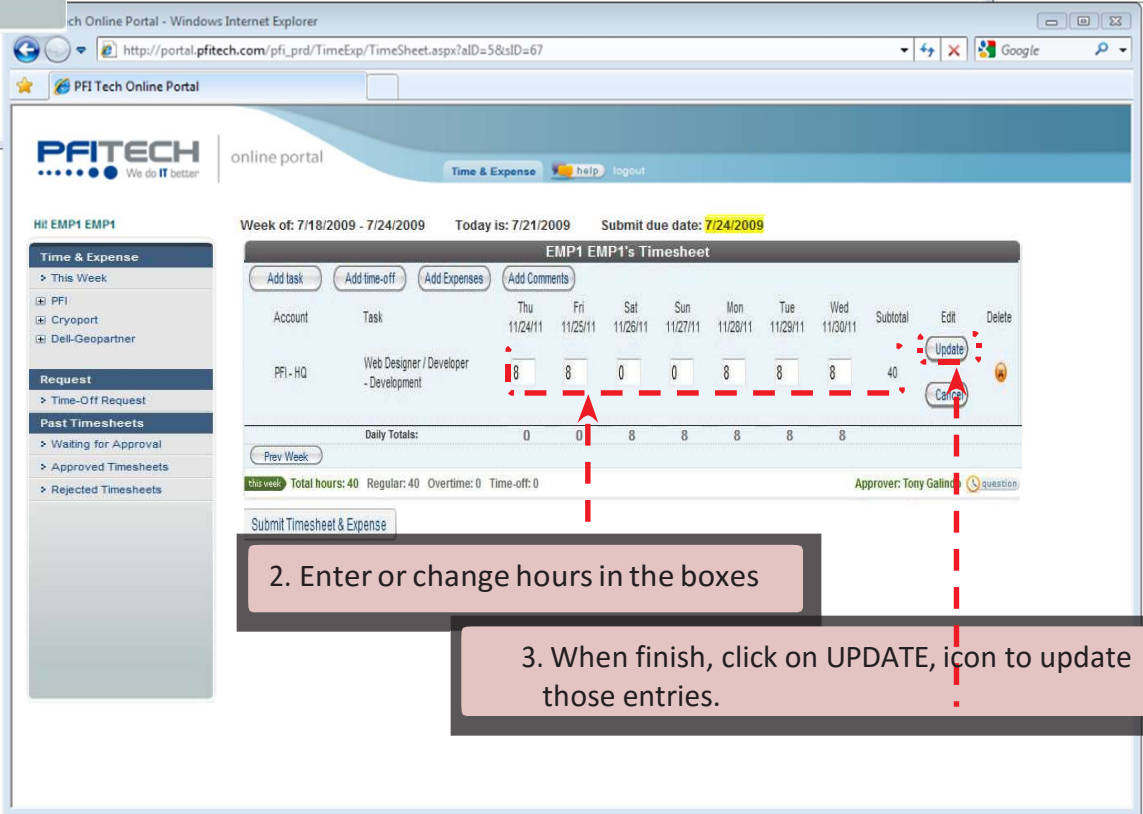
Time and Expense Entry

Edit Existing Entries

To update, erase, or change any existing hours, expenses, or comments, use the EDIT function (note that you can only add or delete Comments, not to edit).



1. Click on EDIT icon to make an existing task/row editable.

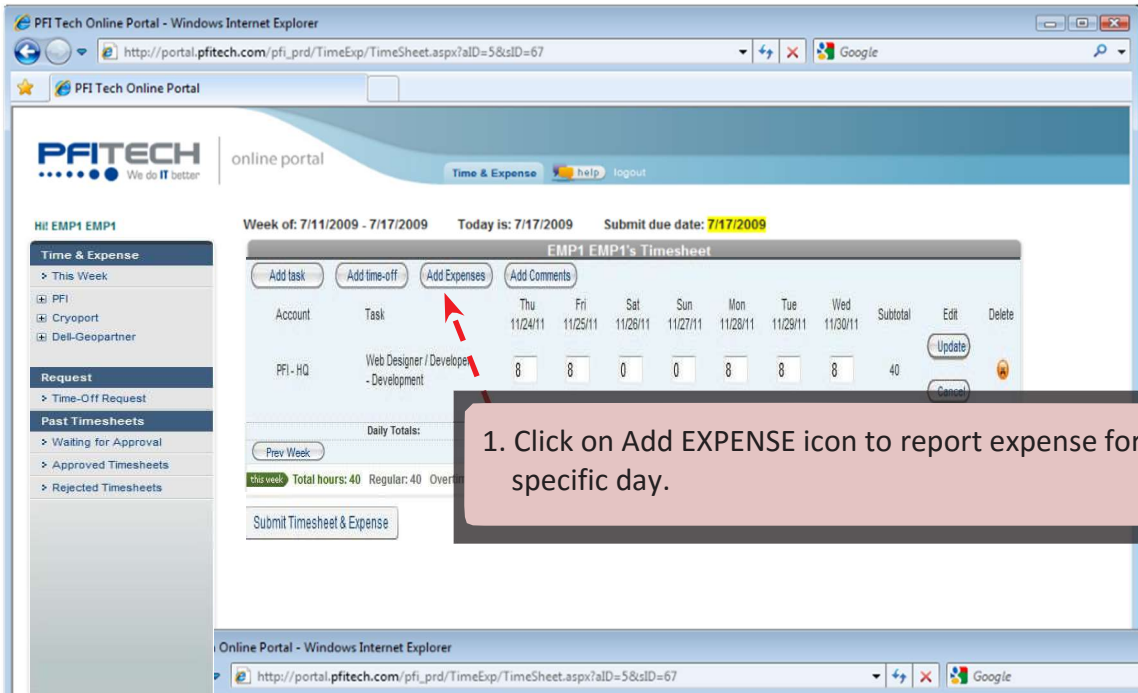


2. Enter or change hours in the boxes

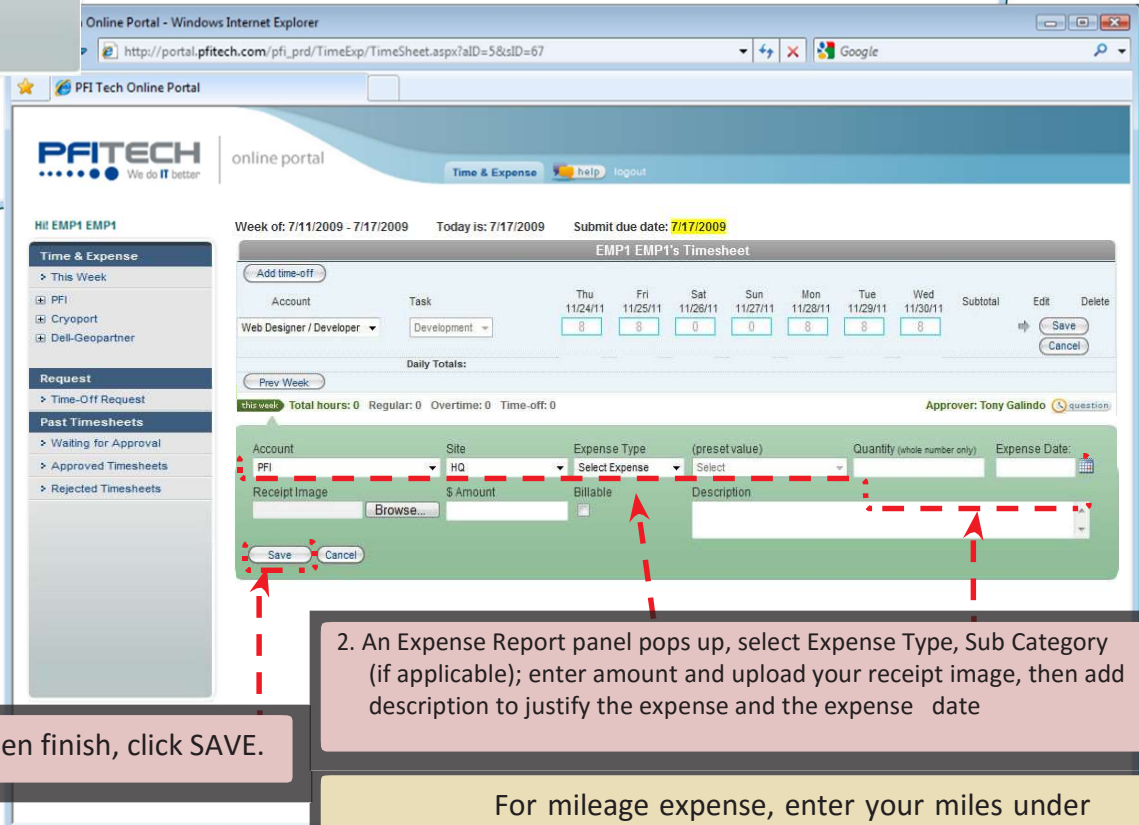
3. When finish, click on UPDATE, icon to update those entries.

Time and Expense Entry

Expense Entry



1. Click on Add EXPENSE icon to report expense for a specific day.




2. An Expense Report panel pops up, select Expense Type, Sub Category (if applicable); enter amount and upload your receipt image, then add description to justify the expense and the expense date

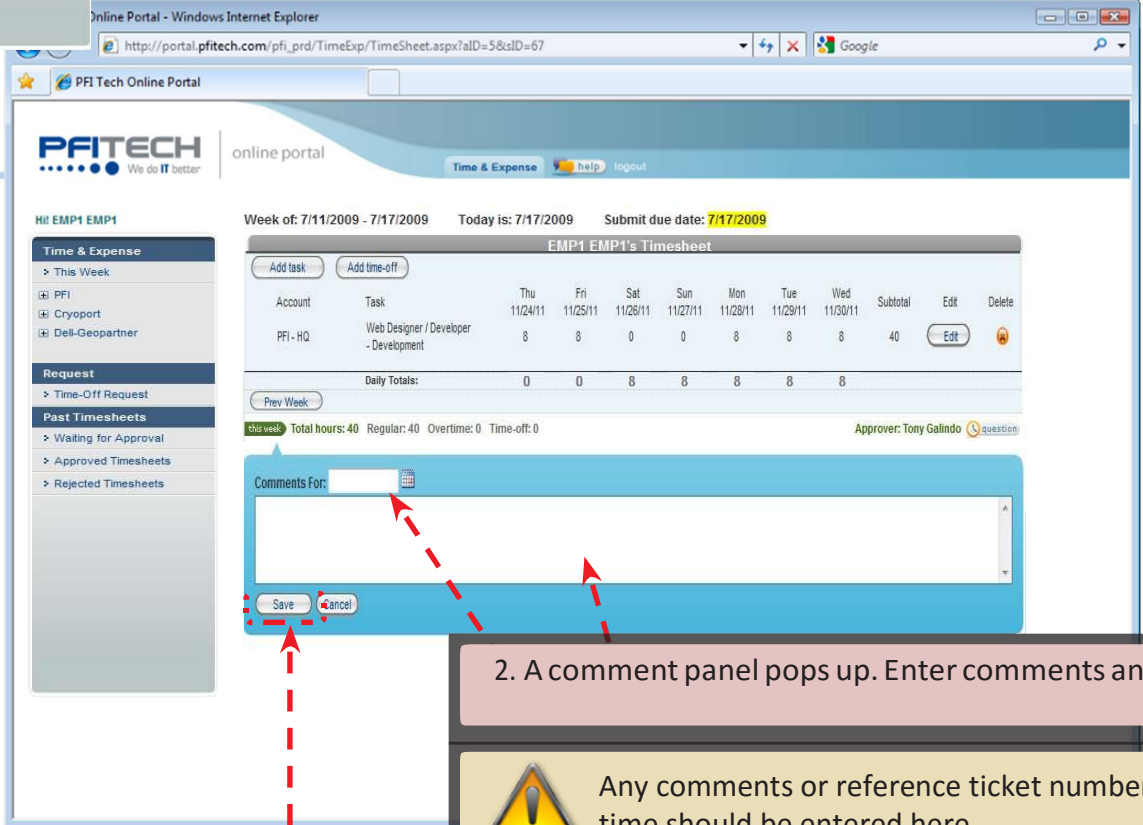
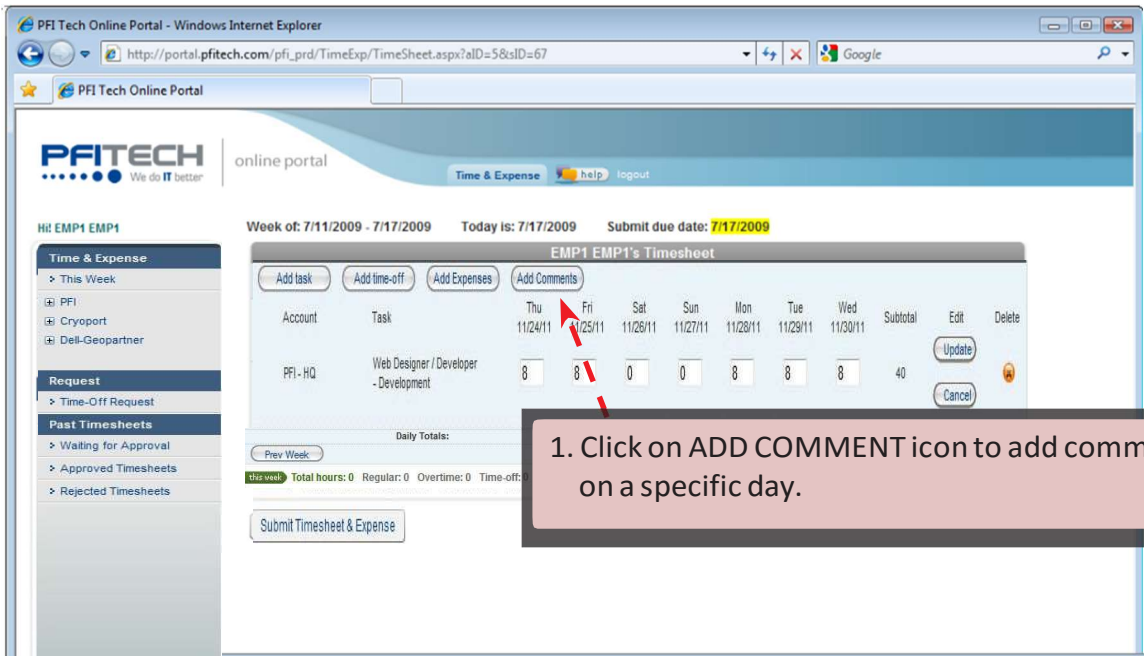
3. When finish, click SAVE.

For mileage expense, enter your miles under "Quantity" and the system will auto-calculate "\$ Amount" once you SAVE it.

The acceptable file formats of receipt images are: pdf, bmp, tif, jpg, gif, xls, xlsx, and doc.



Time and Expense Entry Comment Entry



Any comments or reference ticket number for over time should be entered here.

3. When finish, click SAVE.

Time and Expense Entry

Add Time to Another Task

Hours of different tasks should be entered respectively. If you worked on more than one task, use the ADD TASK function to report the hours.

Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

EMP1 EMP1's Timesheet

Account Task Thu Fri Sat Sun Mon Tue Wed Subtotal Edit Delete

PFI-HQ	Web Designer / Developer - Development	8	8	8	8	8	8	8	40	Edit	Delete
Daily Totals:		0	0	8	8	8	8	8			

1. Click on the ADD TASK button for a new row/task to show up.

Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

EMP1 EMP1's Timesheet

Account Task Thu Fri Sat Sun Mon Tue Wed Subtotal Edit Delete

PFI-HQ	Web Designer / Developer - Development	8	8	0	0	8	8	8	40	Edit	Delete
Daily Totals:		8	8	0	0	8	8	8			

Select Position: [Web Designer / Developer] Select Task: [Development]

2. Two drop-down menus pop up for you to choose which position and task to add. First, select position.

PFITECH online portal
 Time & Expense help logout

Hi! EMP1 EMP1
 Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

EMP1 EMP1's Timesheet

Account: PFI - HQ Task: Web Designer / Developer - Development

Account	Task	Thu 11/24/11	Fri 11/25/11	Sat 11/26/11	Sun 11/27/11	Mon 11/28/11	Tue 11/29/11	Wed 11/30/11	Subtotal	Edit	Delete
PFI - HQ	Web Designer / Developer - Development	8	8	0	0	8	8	8	40	Edit	Delete
Web Designer / Developer		Select Task		Select Task		Select Task		Select Task		Cancel	
Web Designer / Developer		8	8	0	0	8	8	8			
this week Total hours: 120 Regular: 40 Overtime: 80 Time-off: 0										Approver: Tony Galindo	

Submit Timesheet & Expense

3. Then select task.

PFITECH online portal
 Time & Expense help logout

Hi! EMP1 EMP1
 Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

EMP1 EMP1's Timesheet

Account: PFI - HQ Task: Web Designer / Developer - Development

Account	Task	Thu 11/24/11	Fri 11/25/11	Sat 11/26/11	Sun 11/27/11	Mon 11/28/11	Tue 11/29/11	Wed 11/30/11	Subtotal	Edit	Delete
PFI - HQ	Web Designer / Developer - Development	8	8	0	0	8	8	8	40	Edit	Delete
Web Designer / Developer		Development		0		8		8		Save	
Web Designer / Developer		Development		0		8		8		Cancel	
Daily Totals:		0	0	8	8	8	8	8			
this week Total hours: 40 Regular: 40 Overtime: 0 Time-off: 0										Approver: Tony Galindo	

Submit Timesheet & Expense


4. Enter hours of this new task.

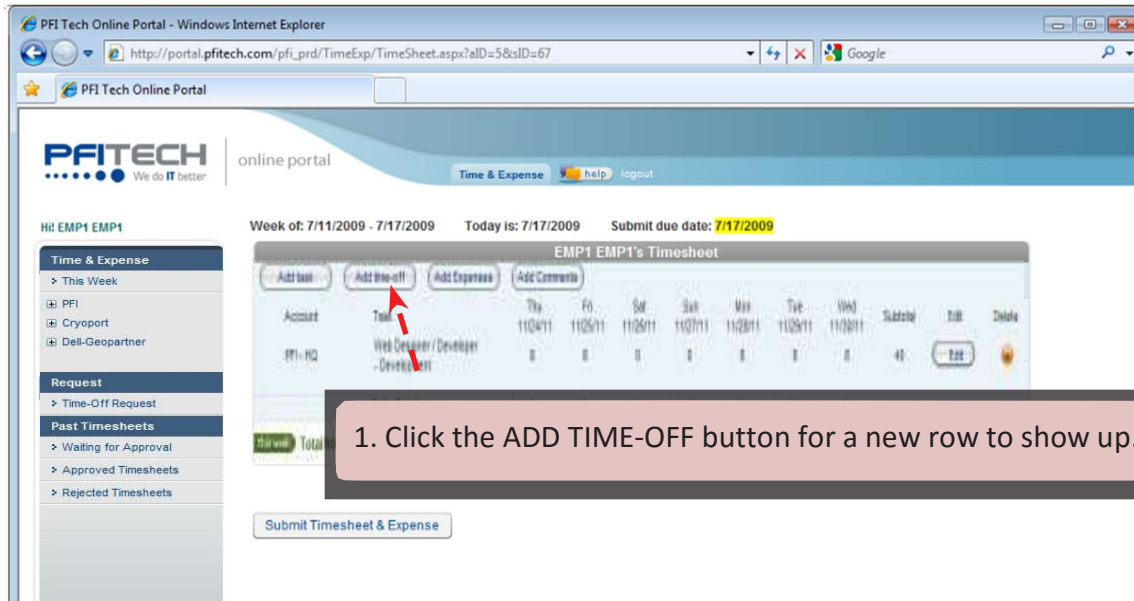
5. When finish, click SAVE.

Time and Expense Entry

Add Time-Off

You can add off hours on specific days by using the TIME OFF function. Time-off hours will be calculated into DAILY TOTALS, SUBTOTAL, and TOTAL HOURS THIS WEEK.

 A position and task must be saved prior to adding a time-off task, even if all the hours worked are 0.



Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

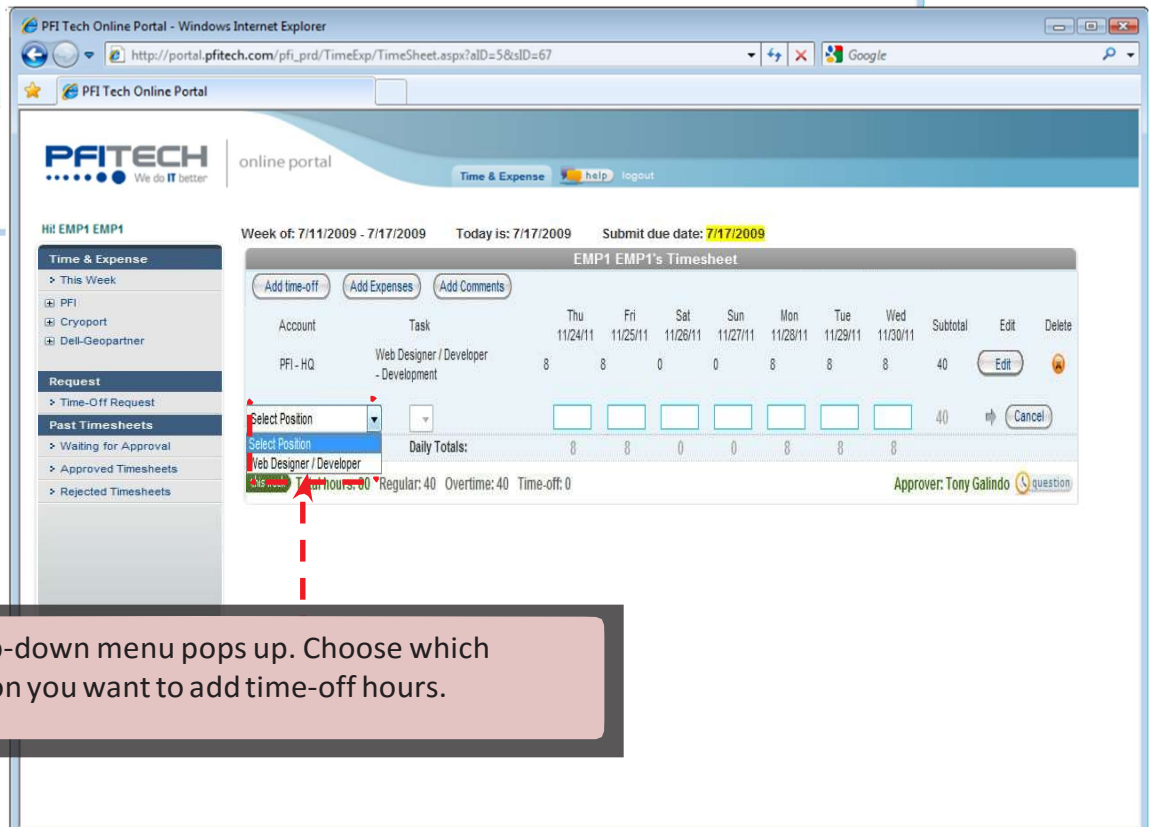
EMP1 EMP1's Timesheet

Buttons: Add Task, Add Time-off, Add Expenses, Add Comments

Account	Task	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Subtotal	Edit	Delete
PFI-HQ	Web Designer / Developer - Development	8	8	0	0	8	8	8	40	Edit	Delete

Submit Timesheet & Expense

1. Click the ADD TIME-OFF button for a new row to show up.



Week of: 7/11/2009 - 7/17/2009 Today is: 7/17/2009 Submit due date: 7/17/2009

EMP1 EMP1's Timesheet

Buttons: Add time-off, Add Expenses, Add Comments

Account	Task	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Subtotal	Edit	Delete
PFI-HQ	Web Designer / Developer - Development	8	8	0	0	8	8	8	40	Edit	Delete

Drop-down menu: Select Position, Web Designer / Developer

Daily Totals: Regular: 40 Overtime: 40 Time-off: 0

Approver: Tony Galindo

2. A drop-down menu pops up. Choose which position you want to add time-off hours.

Time and Expense Entry

Delete Entire Task

You can delete a task/row at any time to erase all hours, expenses, and comments that are bound to that task.

The screenshot shows the PFITECH online portal interface. The main content area displays 'EMP1 EMP1's Timesheet' for the week of 7/11/2009 - 7/17/2009. A table lists tasks with columns for days of the week and a 'Delete' column. An orange 'X' button is visible in the 'Delete' column for the task 'Web Designer / Developer - Development'. A red dashed arrow points from this button to a callout box.

Click the orange X button to delete the entire task/row.

Once clicked and deleted the task/row, hours, expenses, and comments bound to it are permanently deleted.

Time and Expense Entry

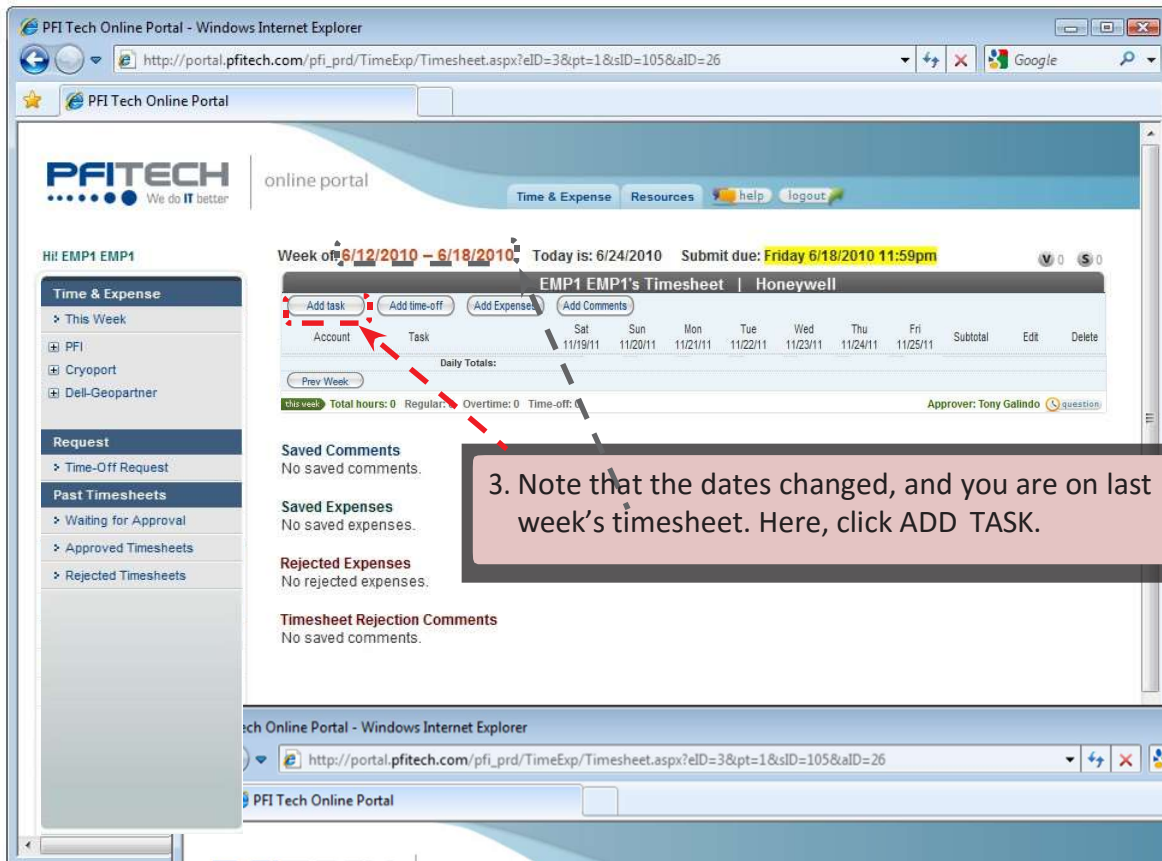
Add Tasks to Past Timesheets

If you had to add a task to a certain timesheet for Last Week, Two Weeks Ago, or Three Weeks Ago, etc., first, click on the job site that you want to add task to, then click that past week. (A timesheet can't be edited if it's been approved)

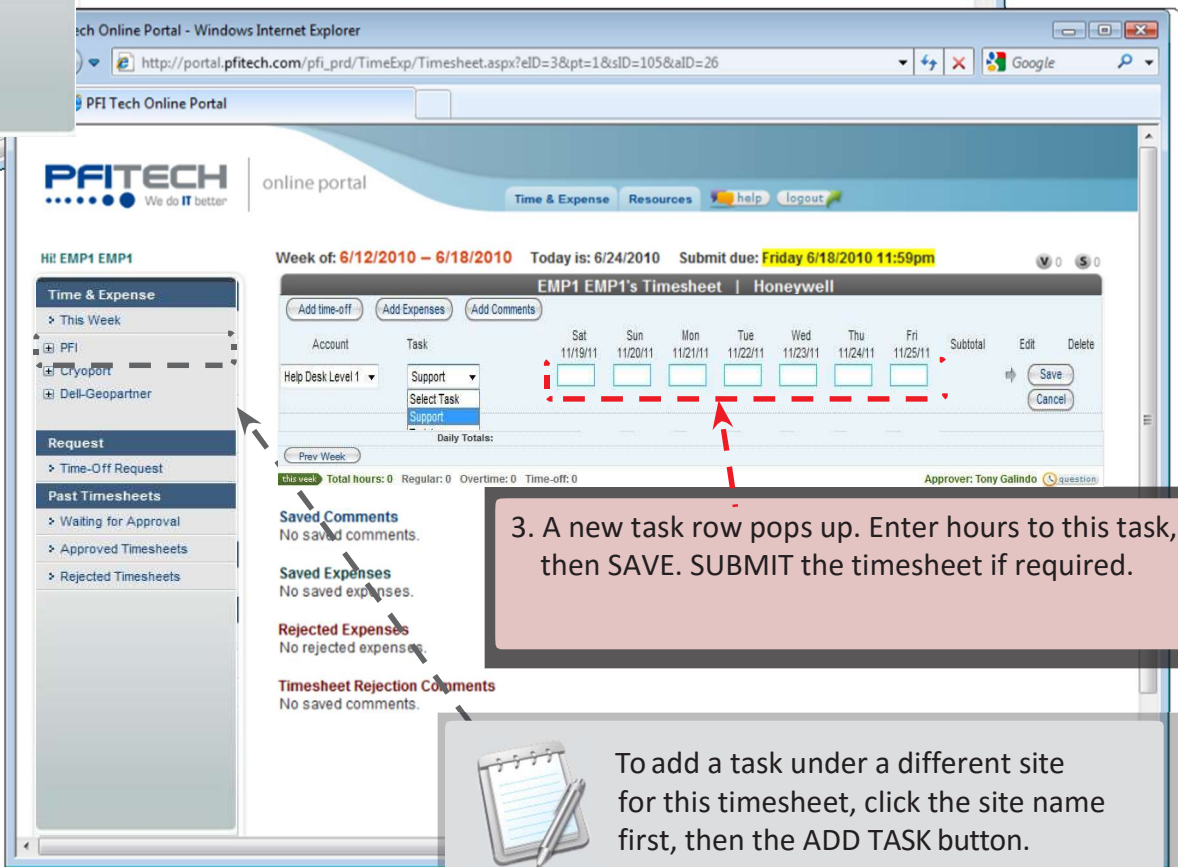
The first screenshot shows the 'Time & Expense' section of the portal. A red dashed arrow points from a text box to the 'PFI' link in the left-hand navigation menu. The text box contains the instruction: '1. Under Time & Expense section, click on the site name you want to add task(s) to.'

The second screenshot shows the 'EMP1 EMP1's Timesheet | Honeywell' page. A red dashed arrow points from a text box to the 'Prev Week' button. The text box contains the instruction: '2. You come to the current week's timesheet. Click on Prev. Week.'

The second screenshot also displays a table for the week of 6/19/2010 - 6/25/2010. The table has columns for Account, Task, and days of the week (Sat, Sun, Mon, Tue, Wed, Thu, Fri). Below the table, it shows 'Daily Totals' and 'Total Time: 0 Regular: 0 Overtime: 0 Time-off: 0'. The approver is listed as Tony Galindo.



3. Note that the dates changed, and you are on last week's timesheet. Here, click ADD TASK.



3. A new task row pops up. Enter hours to this task, then SAVE. SUBMIT the timesheet if required.

To add a task under a different site for this timesheet, click the site name first, then the ADD TASK button.

Time and Expense Entry Submission

The screenshot shows the PFI Tech Online Portal interface. The main content area displays the 'EMP1 EMP1's Timesheet' for the week of 7/11/2009 - 7/17/2009. The interface includes a navigation menu on the left, a main content area with a table of daily entries, and a 'Submit Timesheet & Expense' button at the bottom. A red dashed box highlights the button, and a red arrow points to it from an explanatory text box.

Account	Task	Th	Fr	Sa	Su	Mo	Tu	We	Subtotal	Rate	Delete
PFI-HQ	Web Designer/Developer - Development	8	8	8	8	8	8	8	48		+
Daily Totals:		0	0	8	8	8	8	8			

Submit Timesheet & Expense

At any time, you can click **SUBMIT TIMESHEET & EXPENSE** button to submit all your hours and expenses for that week.

You must submit **TIMESHEET & EXPENSE** before your employer's predetermined deadline. If not submitted, both your supervisor and you will receive a Timesheet-Overdue email. Your wages and expenses will roll over to the next pay period, and you will not receive any check or deposit for that period.

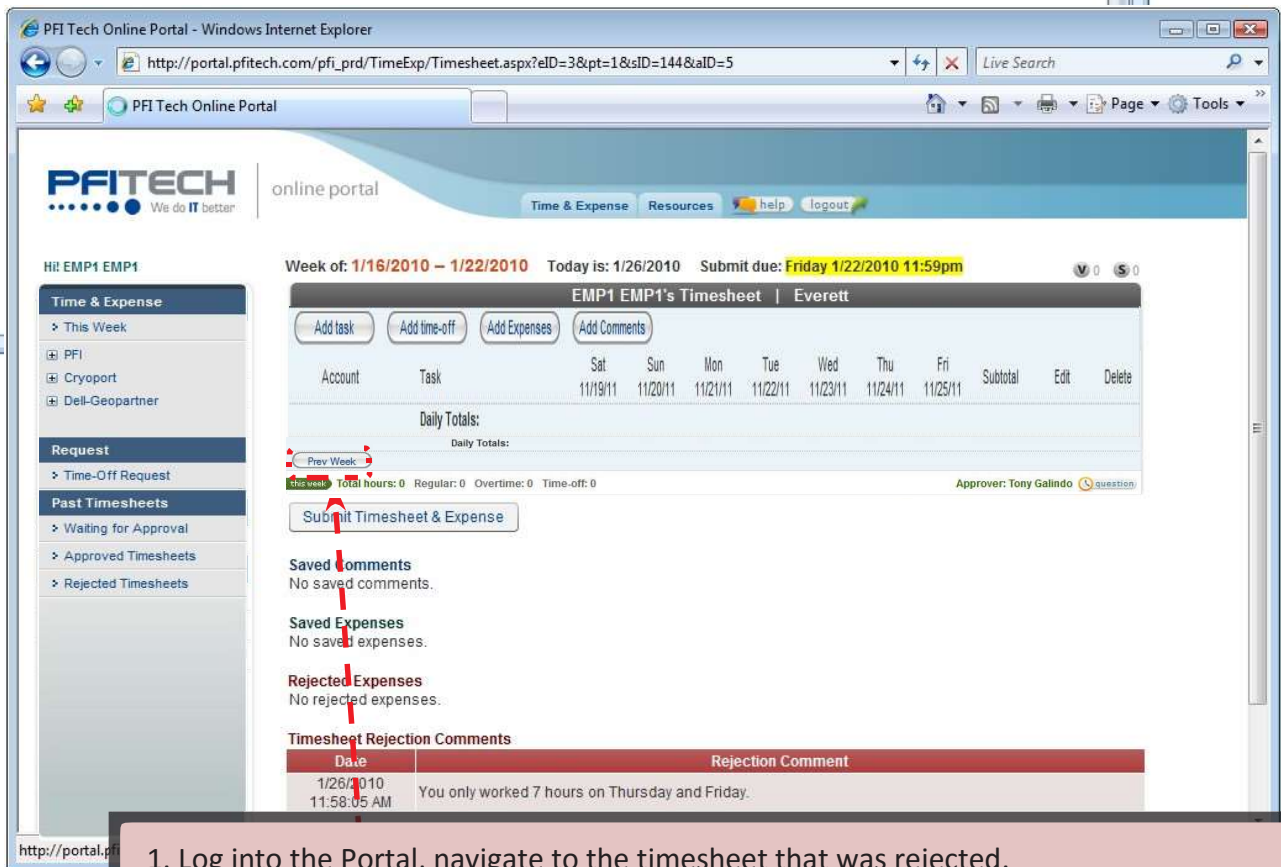
Rejected Submissions

Rejected Timesheets

When a timesheet is rejected, an email is automatically sent to you with the supervisor's rejection comment. You must login to the Portal and navigate to that timesheet and correct it, then resubmit it in order to be paid on time.



You receive an email notifying you that the timesheet has been rejected. It includes the rejection comment given by your supervisor.



1. Log into the Portal, navigate to the timesheet that was rejected.

Week of: 1/16/2010 – 1/22/2010 Today is: 1/26/2010 Submit due: Friday 1/22/2010 11:59pm

EMP1 EMP1's Timesheet | Everett

Account	Task	Sat 11/19/11	Sun 11/20/11	Mon 11/21/11	Tue 11/22/11	Wed 11/23/11	Thu 11/24/11	Fri 11/25/11	Subtotal	Edit	Delete
Cryoport - Lake Forest	Help Desk Level 1 - Support	0	0	9	9	9	9	9	45	Update	
Daily Totals:		0	0	8	8	8	8	8			

Total hours: 40 Regular: 40 Overtime: 0 Time-off: 0
 Approver: Tony Galindo

Saved Comments
 No saved comments.

Saved Expenses
 No saved expenses.

Rejected Expenses
 No rejected expenses.

Timesheet Rejection Comments

Date	Rejection Comment
1/26/2010 11:58:05 AM	You only worked 7 hours on Thursday and Friday.

2. Correct and UPDATE the timesheet.

Week of: 1/16/2010 – 1/22/2010 Today is: 1/26/2010 Submit due: Friday 1/22/2010 11:59pm

EMP1 EMP1's Timesheet | Everett

Account	Task	Thu 11/24/11	Fri 11/25/11	Sat 11/26/11	Sun 11/27/11	Mon 11/28/11	Tue 11/29/11	Wed 11/30/11	Subtotal	Edit	Delete
PFI - HQ	Web Designer / Developer - Development	8	8	0	0	0	0	0	16	Update	
Daily Totals:		0	0	8	8	8	8	8			

Total hours: 40 Regular: 40 Overtime: 0 Time-off: 0
 Approver: Tony Galindo

Saved Comments
 No saved comments.

Saved Expenses
 No saved expenses.

Rejected Expenses
 No rejected expenses.

Timesheet Rejection Comments

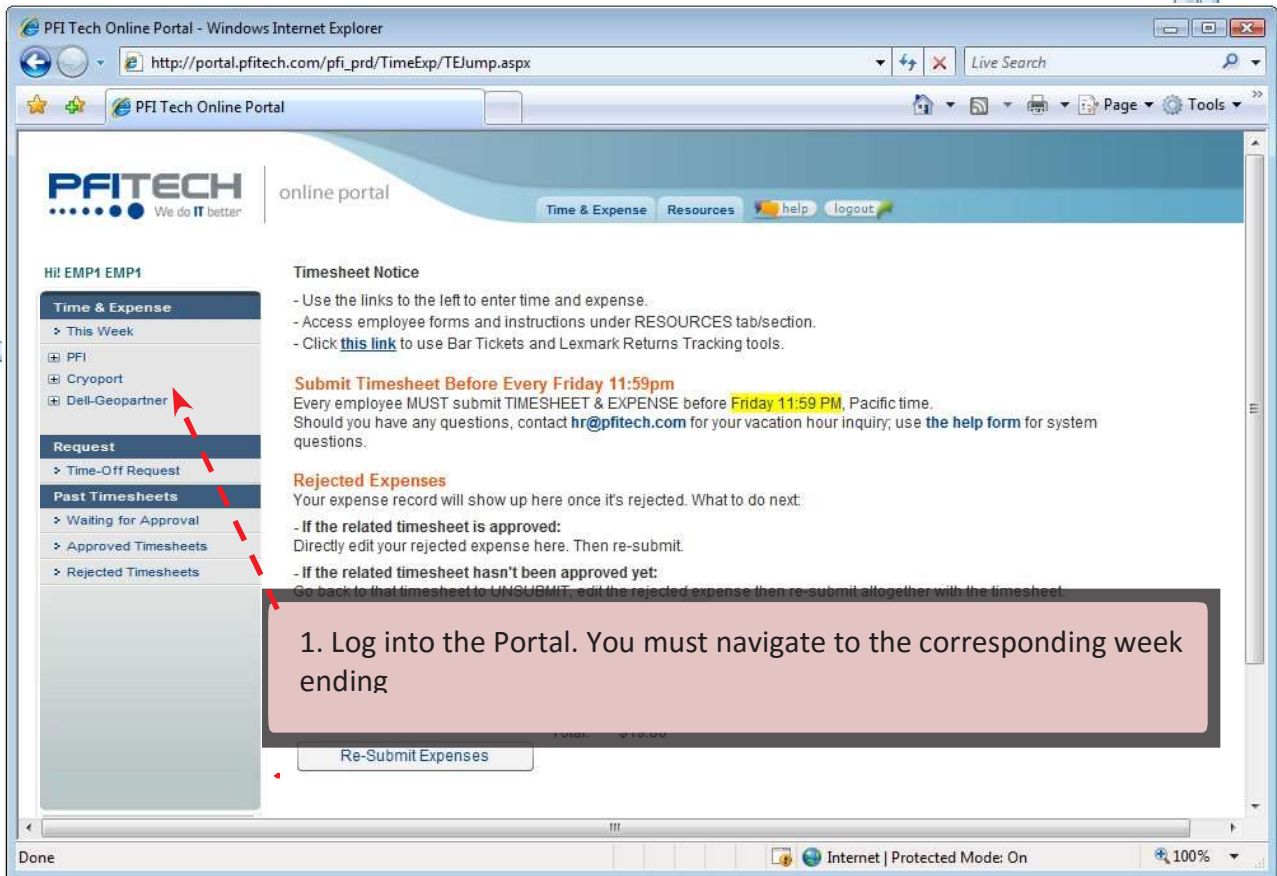
Date	Rejection Comment
1/26/2010 11:58:05 AM	You only worked 7 hours on Thursday and Friday.

3. Click the SUBMIT button to submit the timesheet again.

Rejected Submissions

Rejected Expenses

When an expense is rejected, an email is automatically sent to you with the supervisor's rejection comment. This rejected-expense would then appear on your Portal landing page waiting for you to edit and re-submit, or delete.





Hi! Test user

Time & Expense

- > This Week
- PFI
 - Xerox
 - Xerox Boeing Salt Lake City
 - Xerox ATT Alpharetta
 - Xerox NG ApopkaOrlando 2787 S

Request

- > Time-Off Request

Past Timesheets

- > Waiting for Approval
- > Approved Timesheets
- > Rejected Timesheets

Week of: 7/18/2016 – 7/24/2016 Today is: 7/29/2016 Submit due: **Sunday 7/24/2016 11:59pm**

Test user's Timesheet		Xerox Boeing Salt Lake City							
Account	Task	Mon 07/18/16	Tue 07/19/16	Wed 07/20/16	Thu 07/21/16	Fri 07/22/16	Sat 07/23/16	Sun 07/24/16	Subtotal
Xerox - Xerox Boeing Salt Lake City	Material Handler2 - Support	8							8
Xerox Boeing Labor									
Daily Totals:		8							

Total hours: 8 Regular: 8 Overtime: 0 DoubleTime: 0 Time-off: 0 Approver: Orianna Pacchioni

Saved Comments
No saved comments.

Saved Expenses
No saved expenses.

Rejected Expenses

Account	Date	Expense Type	Sub Category	Qty	\$ Amount	Receipt	Expense Description / Re-submit Comment	Rejection Comment	Edit	Delete
Xerox	07/19/16	Airfare		1	\$60.00		bill	Incorrect week ending	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
					Total:	\$60.00				

Timesheet Rejection Comments

No saved comments.

2. Click on Edit

Date	Expense Type	Sub Category	Qty	\$ Amount	Receipt	Expense Description / Re-submit Comment	Rejection Comment	Edit	Delete
01/18/10	Airfare		1	\$92.00	<input type="button" value="Browse..."/>	Sales meeting with the client. SF city government. From LAX to SFO.	Specify who the client is and attach a receipt.	<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="button" value="Delete"/>
				Total:	Zero				

3. Modify the details to meet your supervisor's requirements, then click UPDATE.

4. Click RE-SUBMIT EXPENSES.



Alternatively, you can edit and re-submit the rejected-expense(s) on the associated timesheet.



If you deleted an expense and you are unable to UNSUBMIT the timesheet to add the expense back, you will have to report that expense on your first working day the following week, with additional notes in the description box.

Request Time Off Feature

Click on Time Off Request

Choose the Time Off Type and Select the Start Date and End Date

Click on Submit

Time-Off History

Employee	Time Off Type	Start Date	End Date	Submit Date	Comments	Appr Date	Total Hrs Off	Vac Hrs Aviable	Sick Hrs Aviable	Current Vac Hrs	Current Sick Hrs	Appr Comments
Nidhi Shetty	Vacation	07/16/2012	07/16/2012	06/13/2012	Vegas Trip	06/15/2012	0	98.95	24	100.49	24.00	
Nidhi Shetty	Sick	02/14/2012	02/15/2012	02/14/2012	Suffering from high fever and cold	02/14/2012	0	71.12	40	100.49	24.00	
Nidhi Shetty	Vacation	01/17/2012	01/17/2012	01/07/2012	Mom's Death Anniversary (family offerings)	01/13/2012	0	71.425	40	100.49	24.00	
Nidhi Shetty	Vacation	05/25/2011	05/30/2011	05/18/2011	Need couple days off.	05/24/2011	0	44.638	40	100.49	24.00	