Portal Manual

portal.pfitech.com/manual

Manual Revision Record

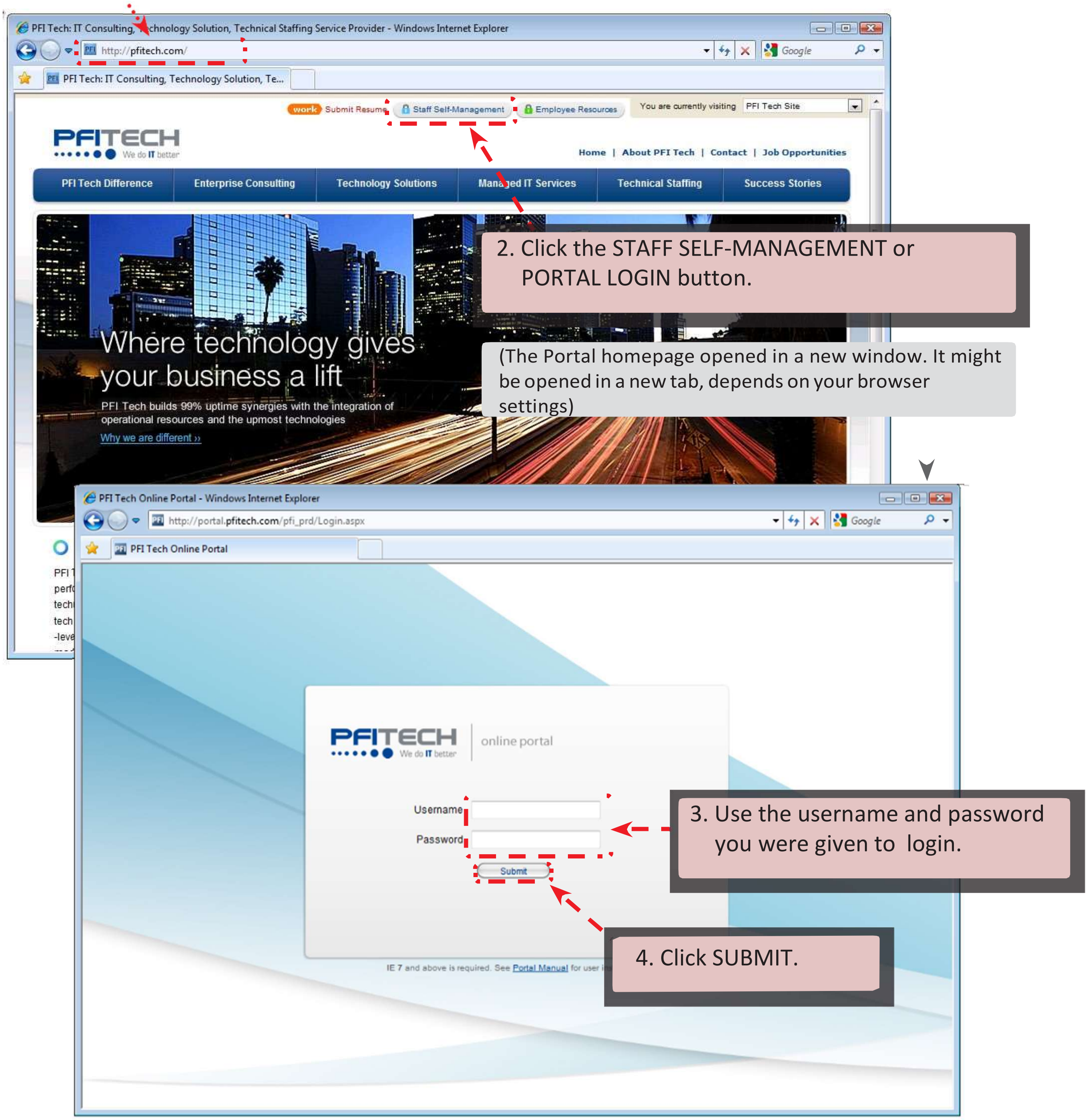
Revisions of this manual are made periodically to include additional functions or features. This record helps users quickly locate the latest changes.

REVISION NO.	DATE	PAGES UPDATED	SUMMARY OF CHANGE
07	10/27/2009	page 11	Notes added to ADD TIME-OFF: "A position and task must be saved prior..."
08	11/13/2009	page 04, 05	- Notes on new Vacation and Sick hours' view. - Additional step added for TIME ENTRY—user now must click ADD TASK to start entering hours.
09	01/26/2010	page 17-21	Added Rejected Submission section that includes Rejected Timesheets and Rejected Expenses.
10	05/12/2010	various	System function updates and additional notes.
11	06/24/2010	page 14-15	Added instruction on Add Tasks to Past Timesheets.
12	07/29/2016	Page 19-20	Modified rejected expenses

A

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.

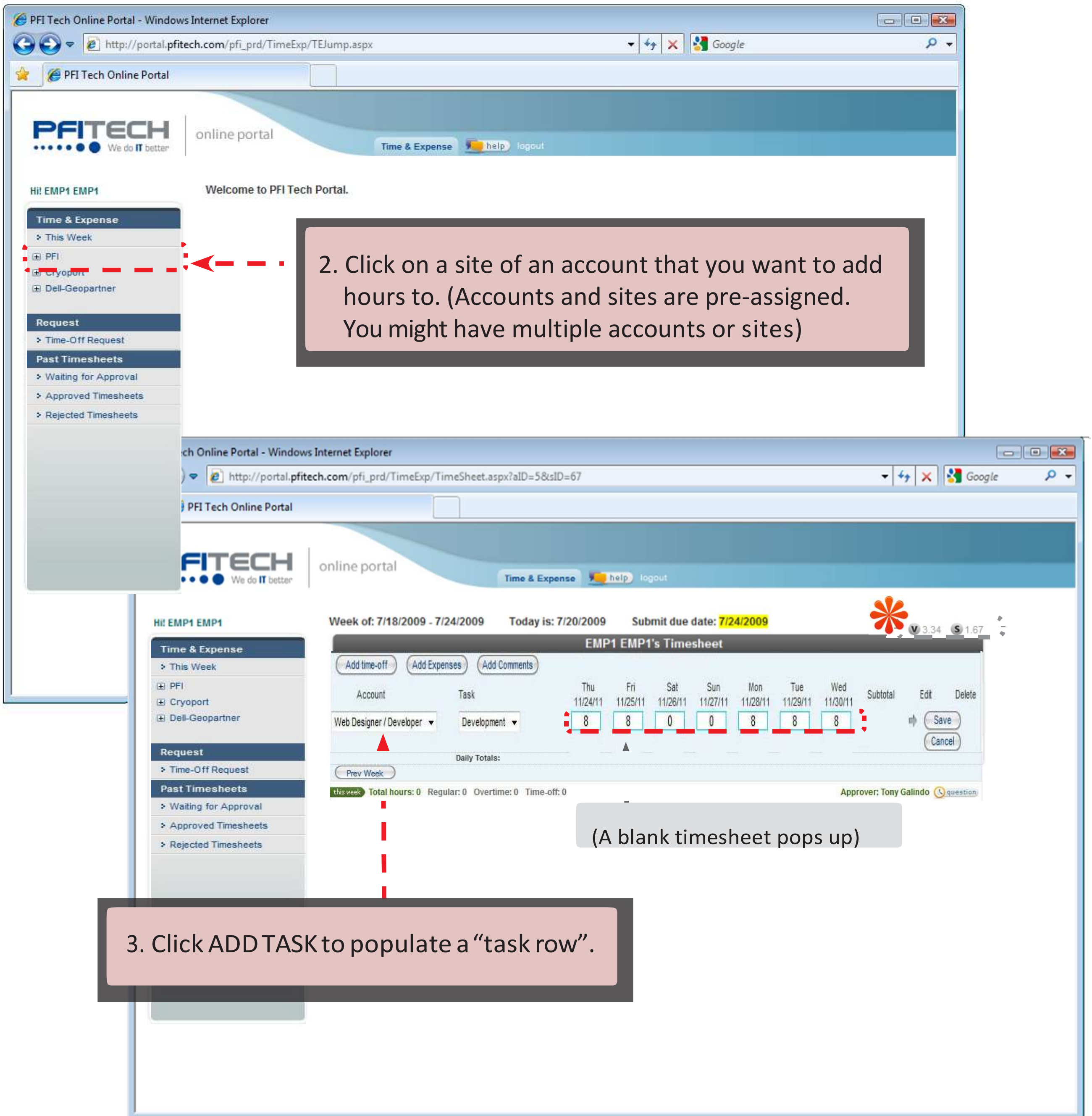
➡ **IE 6** and above is required to access the Portal

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

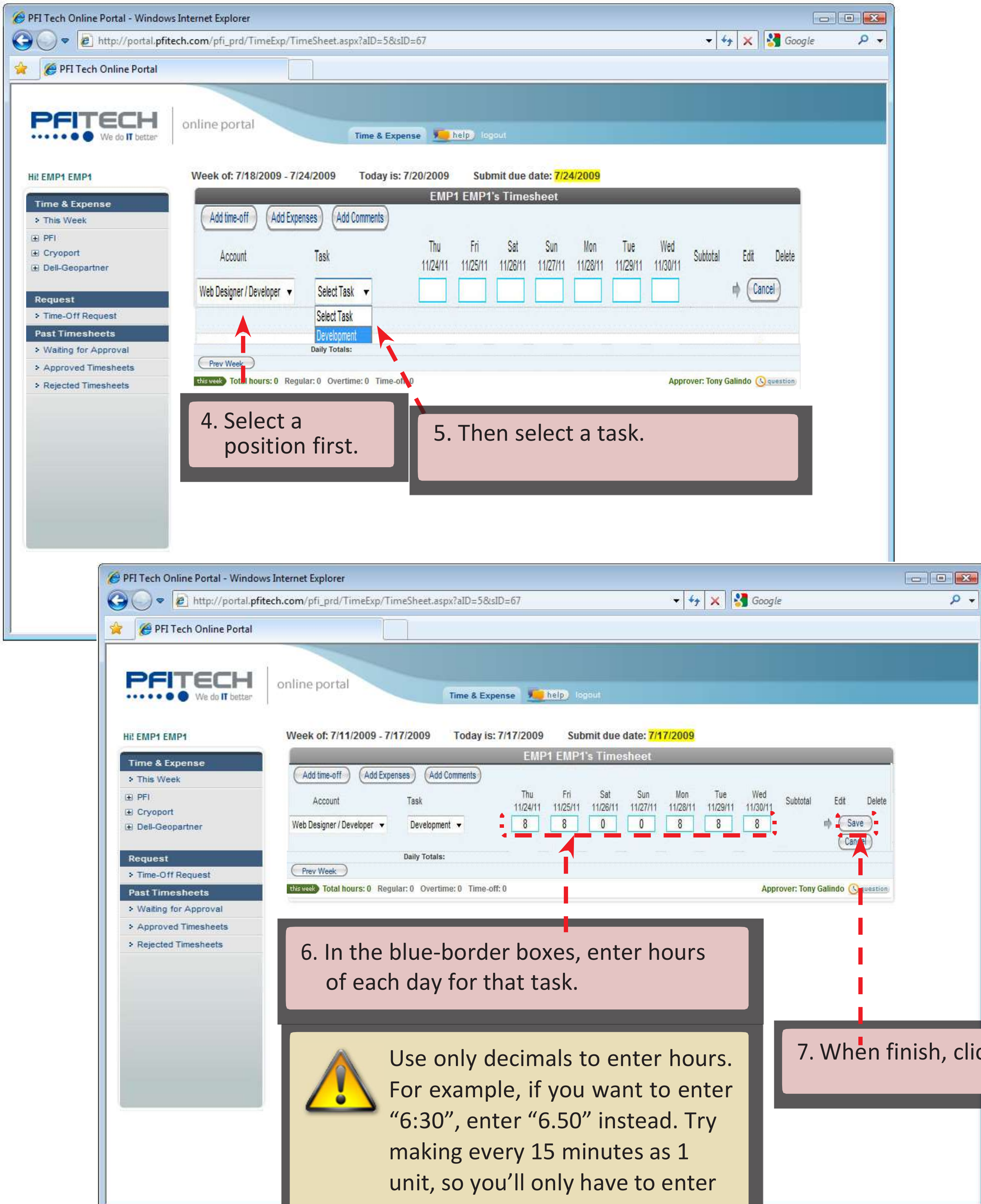
Time and Expense Entry

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.



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.

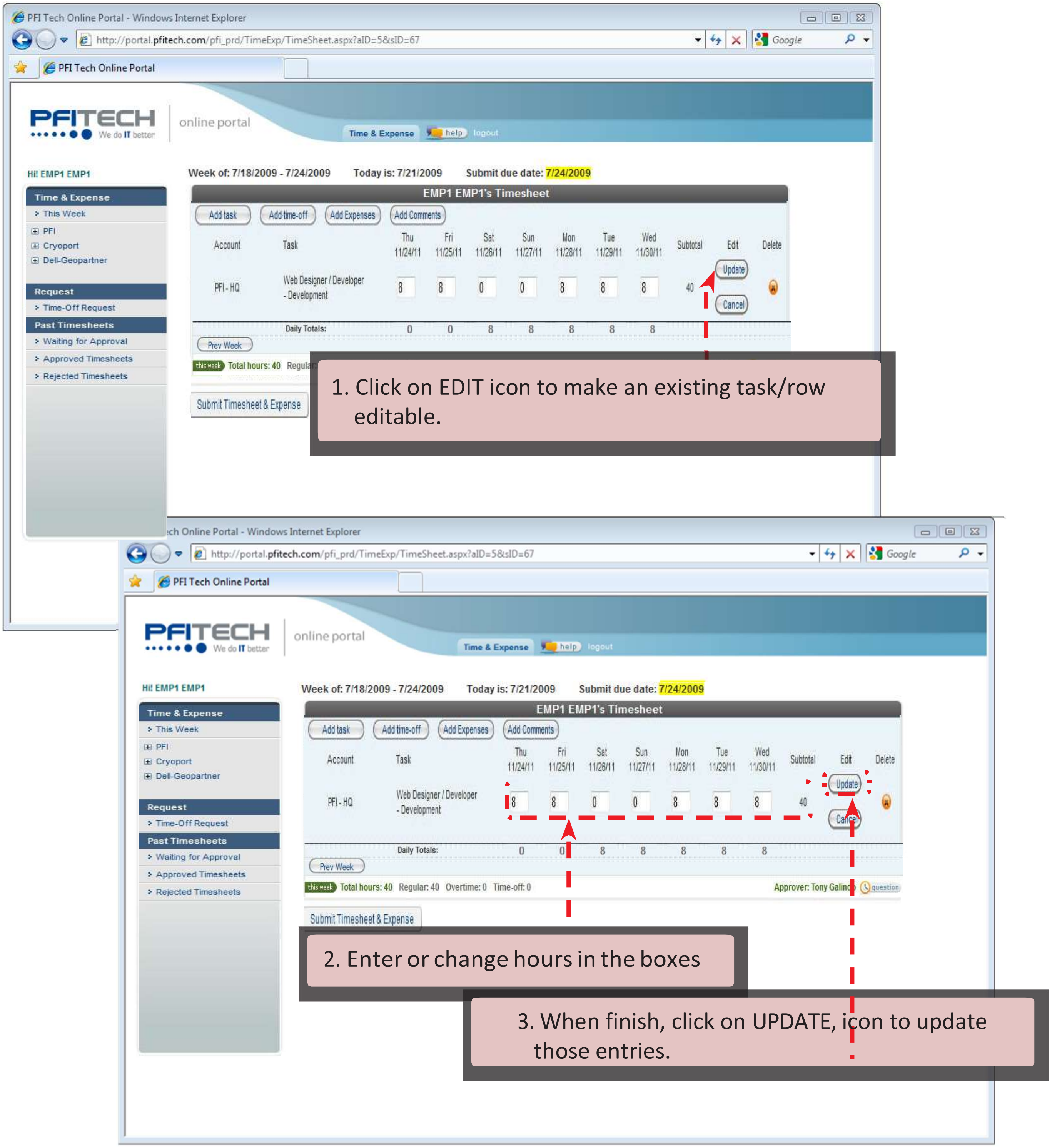
7. When finish, click SAVE.

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.

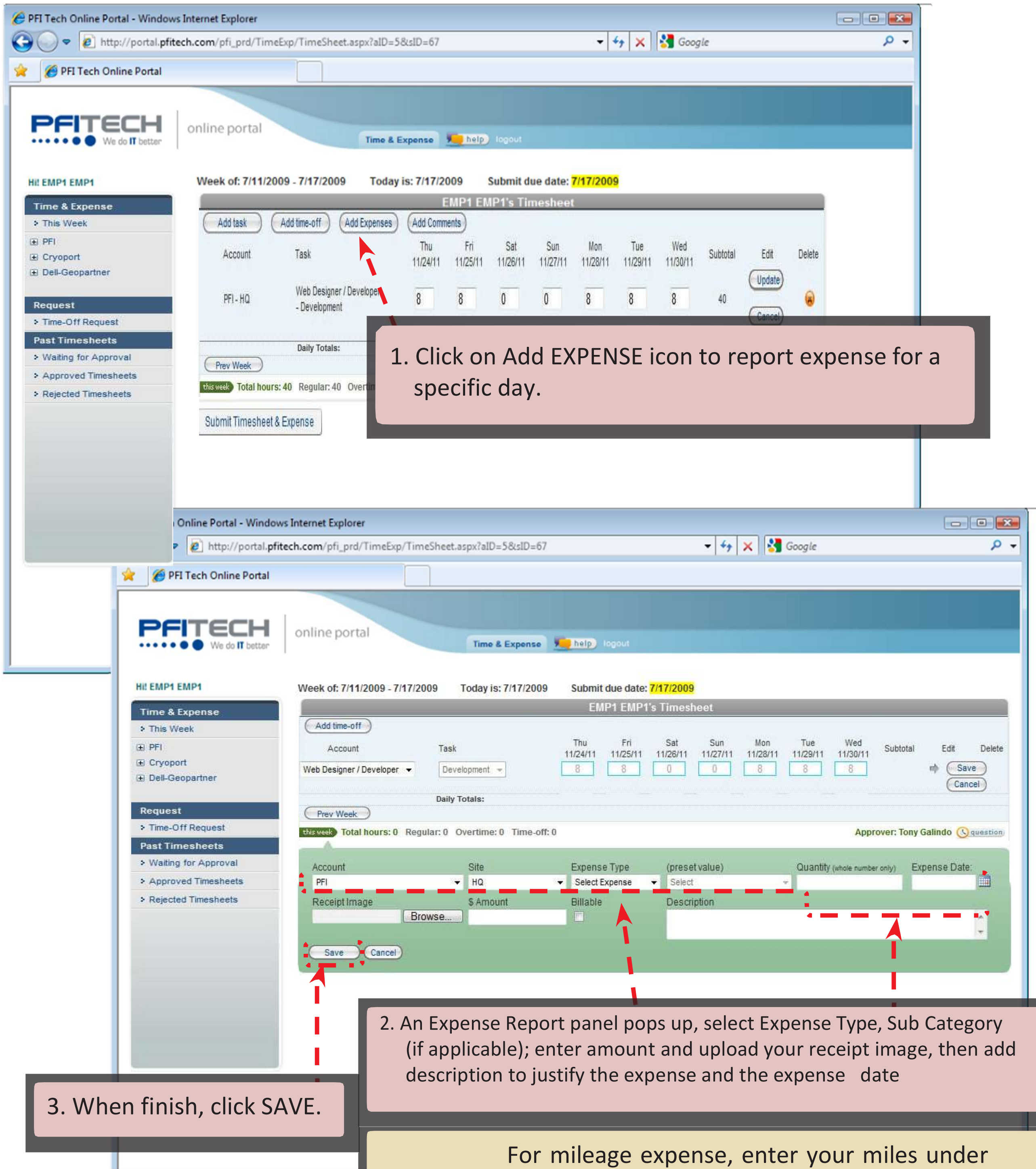
Edit Existing Entries

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).



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.

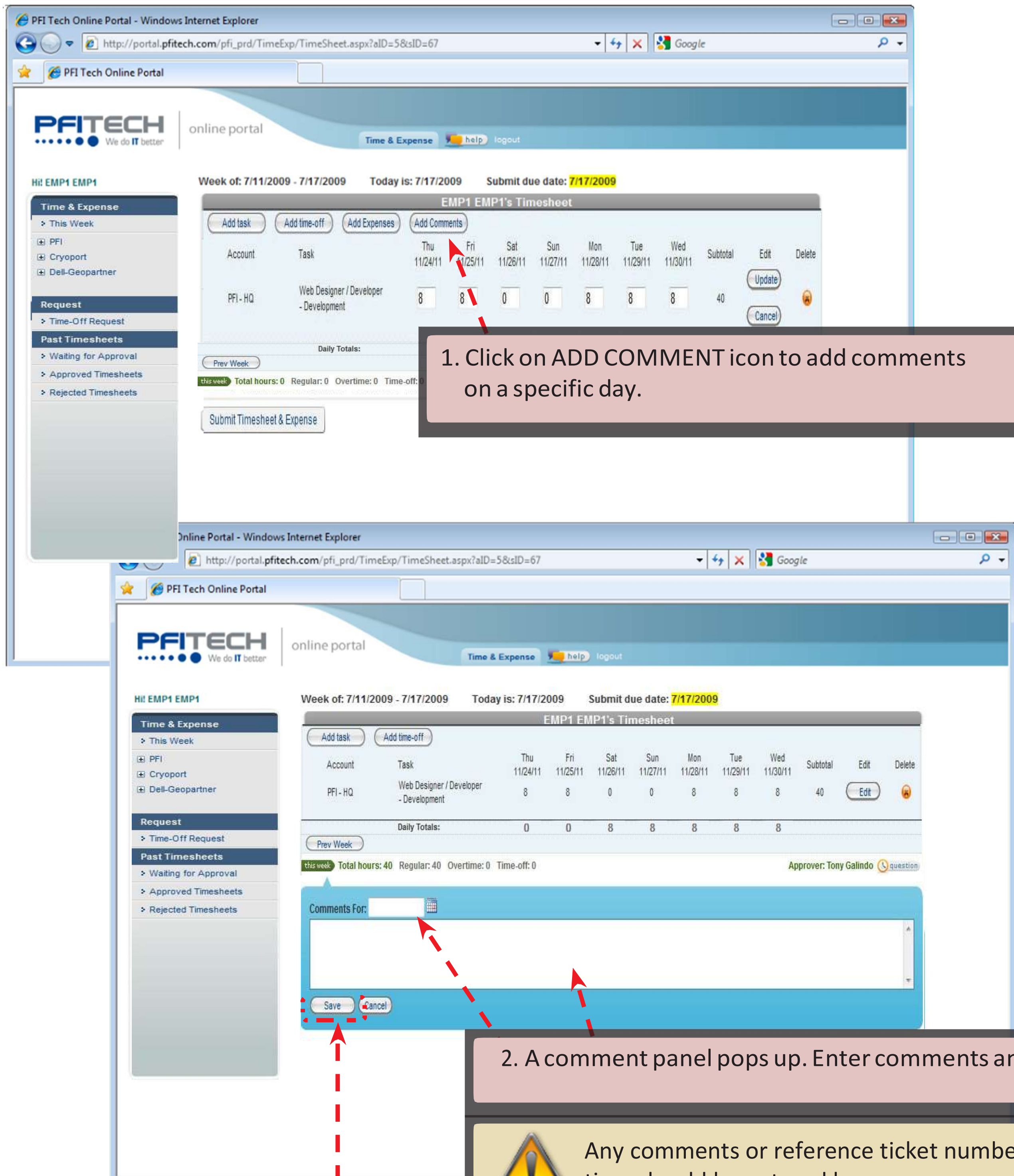
For mileage expense, enter your miles under "Quantity" and the system will auto-calculate "$ Amount" once you SAVE it.

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

B-4

Time and Expense Entry

Comment Entry



1. Click on ADD COMMENT icon to add comments on a specific day.

2. A comment panel pops up. Enter comments and date here.

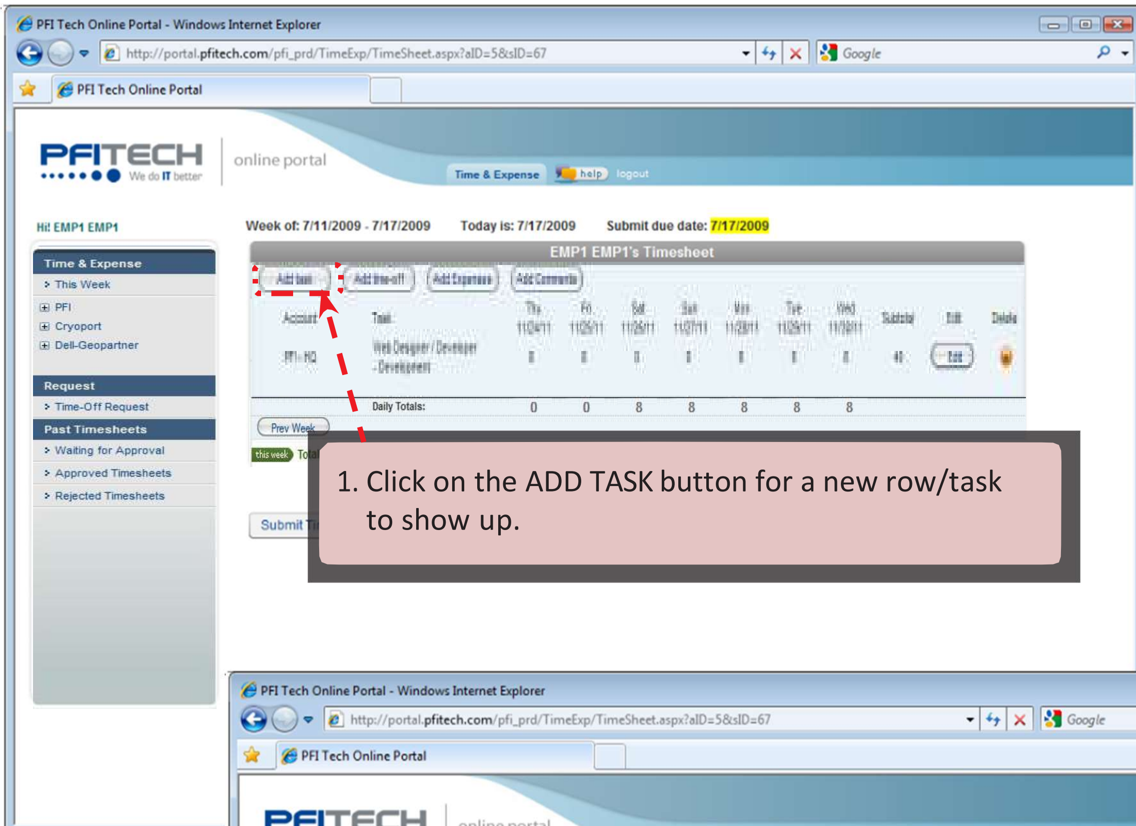
Any comments or reference ticket number for over time should be entered here.

3. When finish, click SAVE.

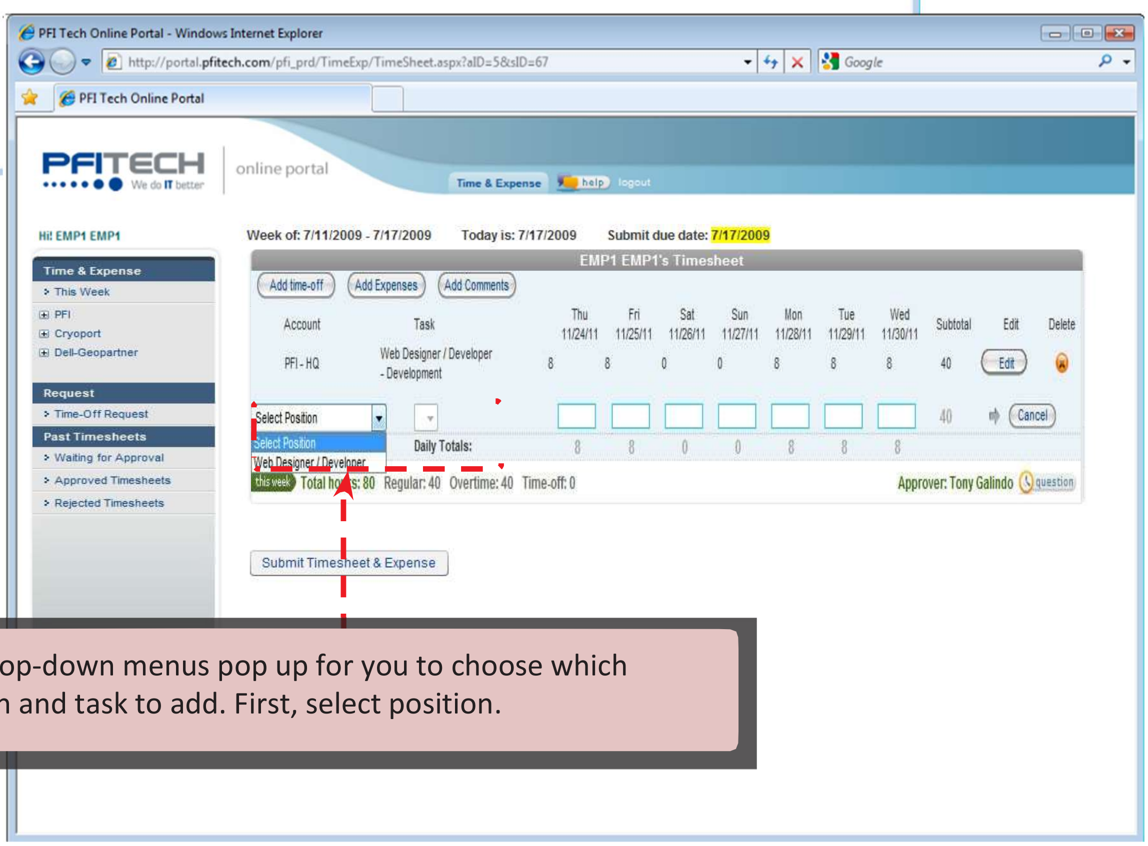
Time and Expense Entry

Add Time to Another Task

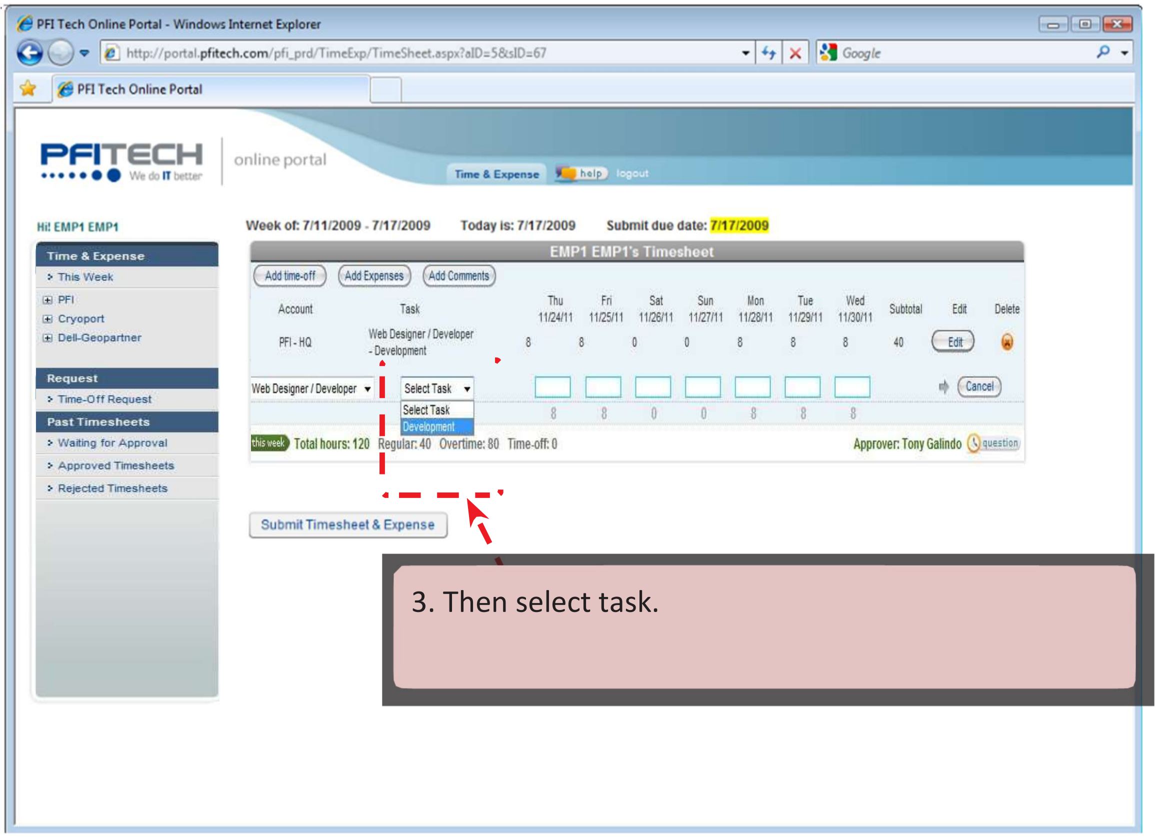
Hours of different tasks should be entered respectively. If you worked on more than one task, use the ADD TASK function to report the hours.

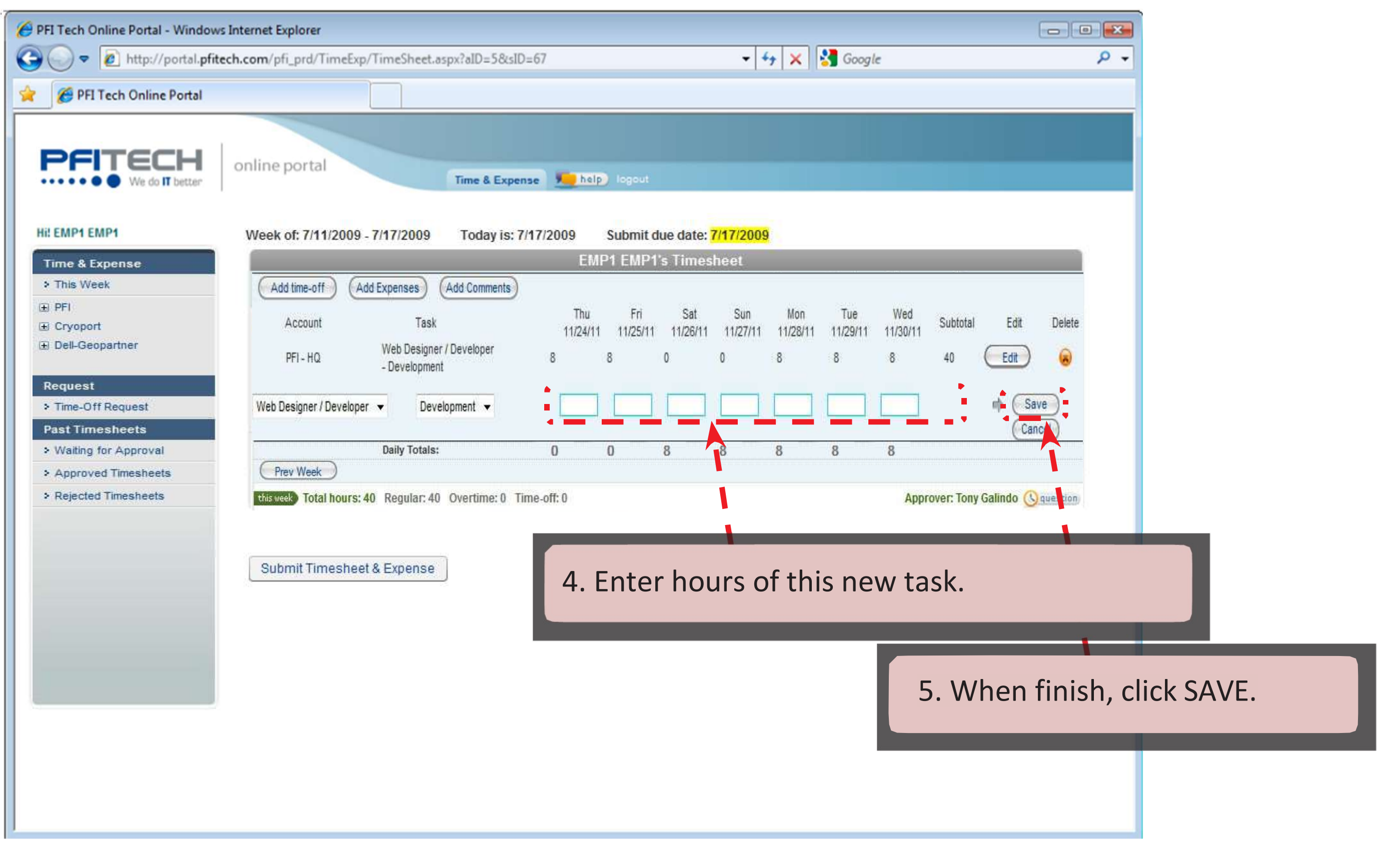


1. Click on the ADD TASK button for a new row/task to show up.



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


PFI Tech Online Portal - Windows Internet Explorer
http://portal.pfitech.com/pfi_prd/TimeExp/TimeSheet.aspx?aID=5&sID=67
PFI Tech Online Portal
PFITECH We do IT better
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
Add time-off
Add Expenses
Add Comments
Time & Expense
This Week
PFI
Cryoport
Dell-Geopartner
Request
Time-Off Request
Past Timesheets
Waiting for Approval
Approved Timesheets
Rejected Timesheets
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
Web Designer / Developer
Select Task
Development
Cancel
Total hours: 120 Regular: 40 Overtime: 80 Time-off: 0
Approver: Tony Galindo
Submit Timesheet & Expense
3. Then select task.

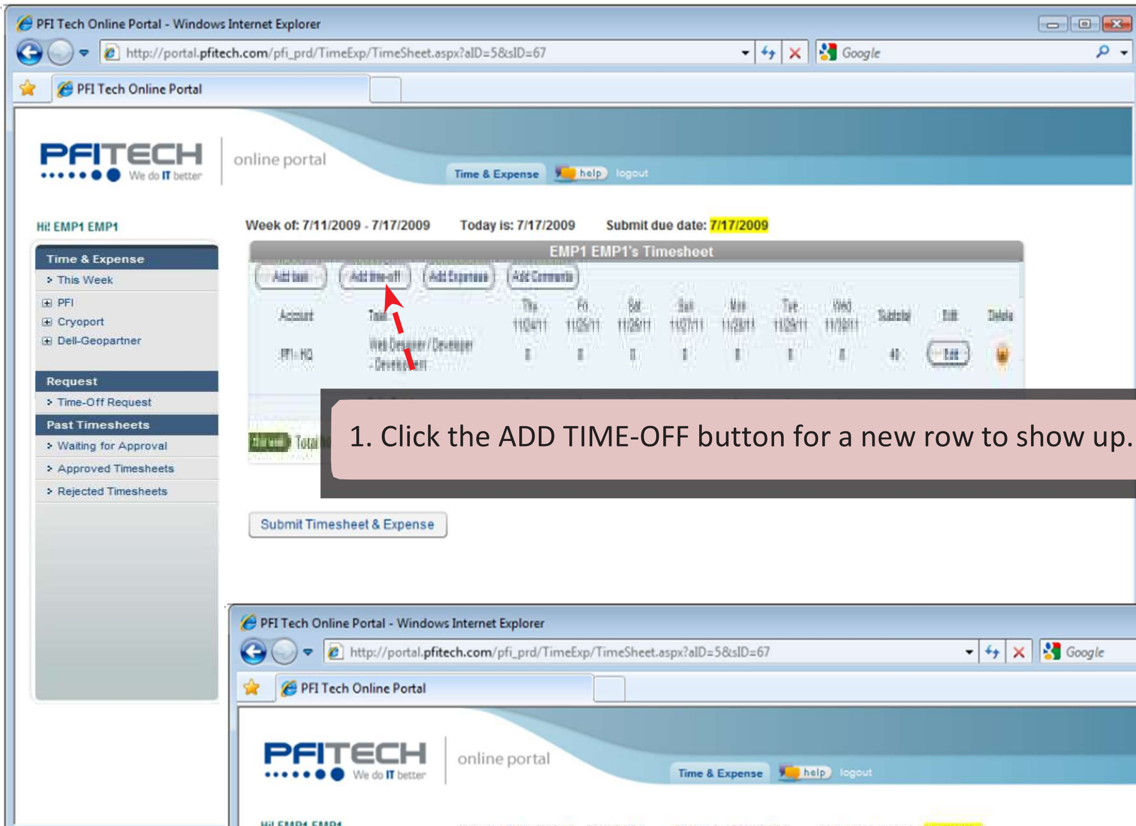

PFI Tech Online Portal - Windows Internet Explorer
http://portal.pfitech.com/pfi_prd/TimeExp/TimeSheet.aspx?aID=5&sID=67
PFI Tech Online Portal
PFITECH We do IT better
online portal
Time & Expense
help
logout
Hi! EMP1 EMP1
Week of: 7/11/2009 - 7/17/2009
Today is: 7/17/2009
Submit due date: 7/17/2009
EMP1 EMP1's Timesheet
Add time-off
Add Expenses
Add Comments
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
Web Designer / Developer
Development
Save
Daily Totals:
Prev 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

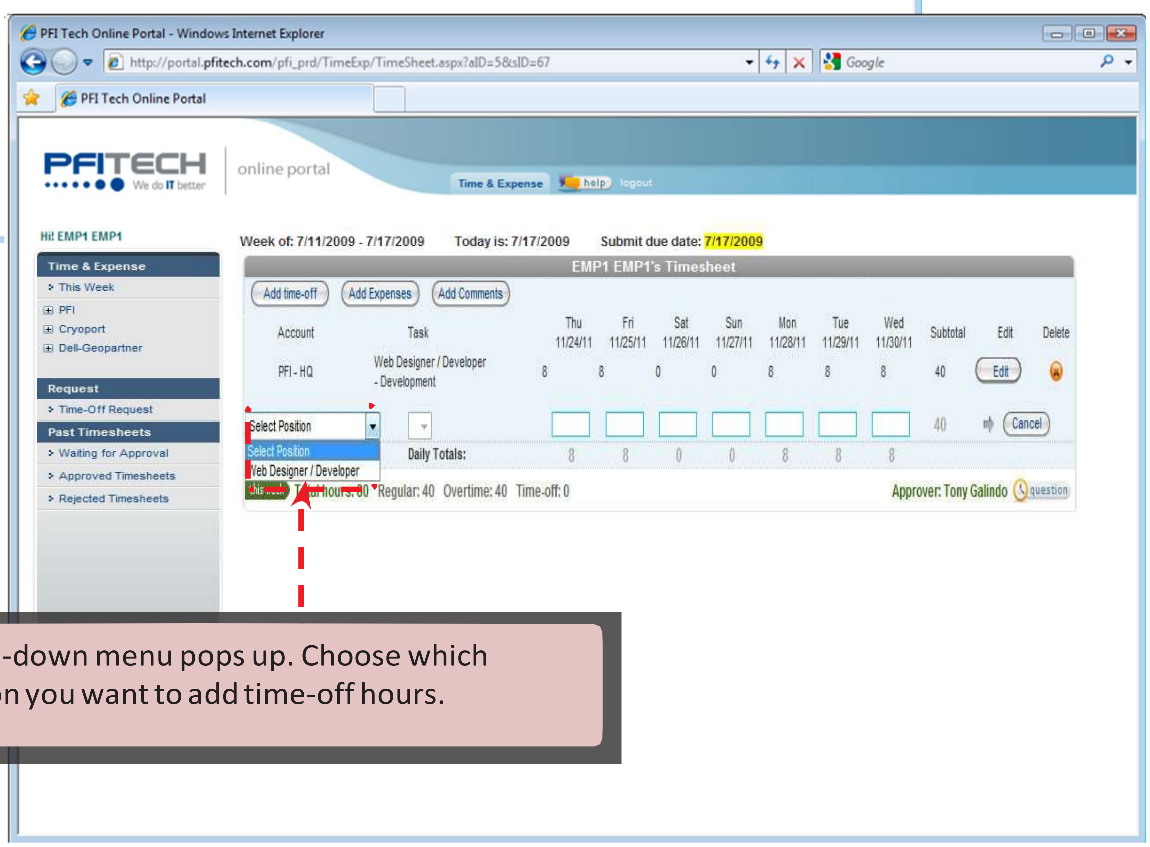
Add Time-Off

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.

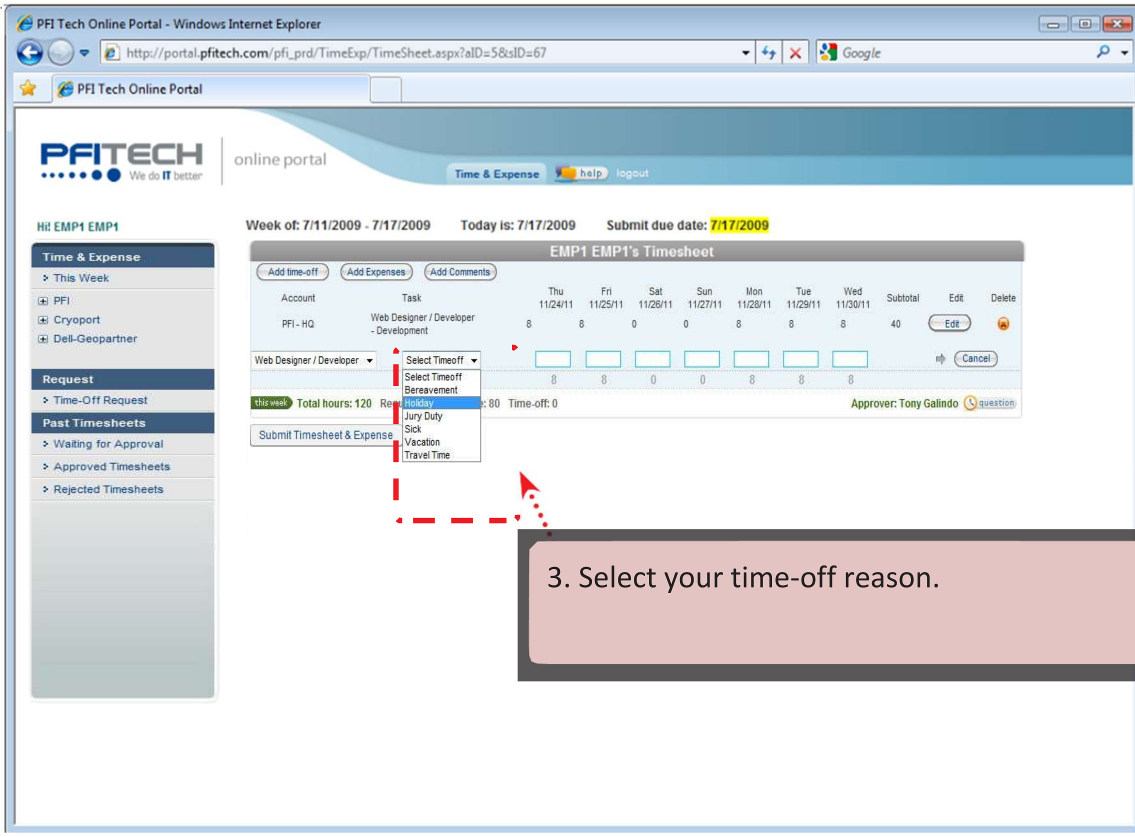
A position and task must be saved prior to adding a time-off task, even if all the hours worked are 0.



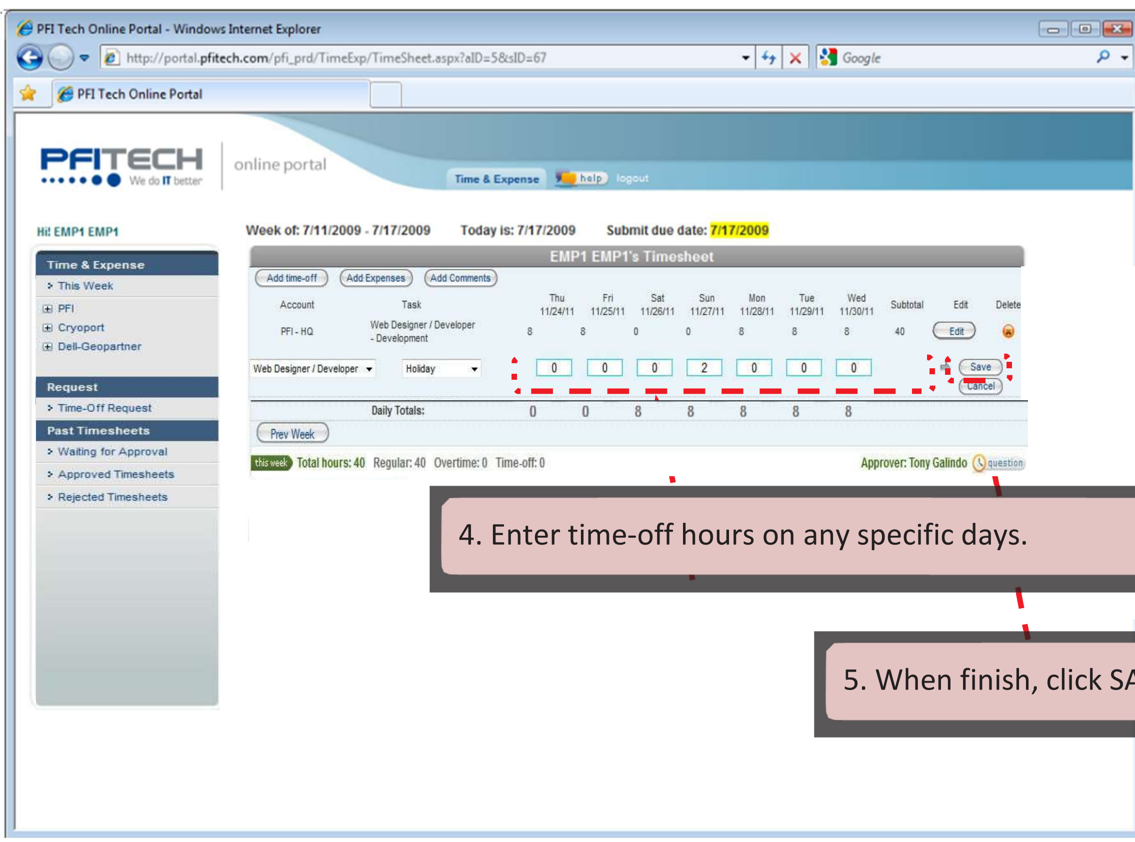
1. Click the ADD TIME-OFF button for a new row to show up.



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



3. Select your time-off reason.



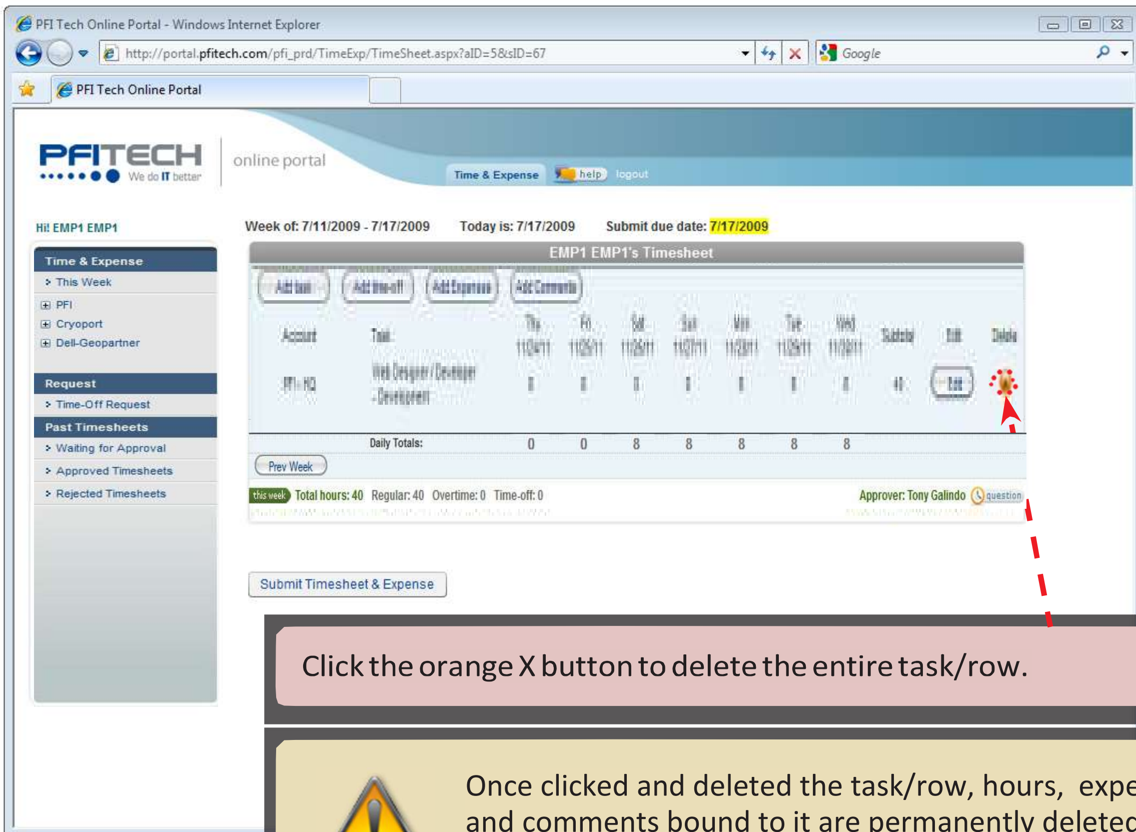
4. Enter time-off hours on any specific days.

5. When finish, click SAVE.

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.



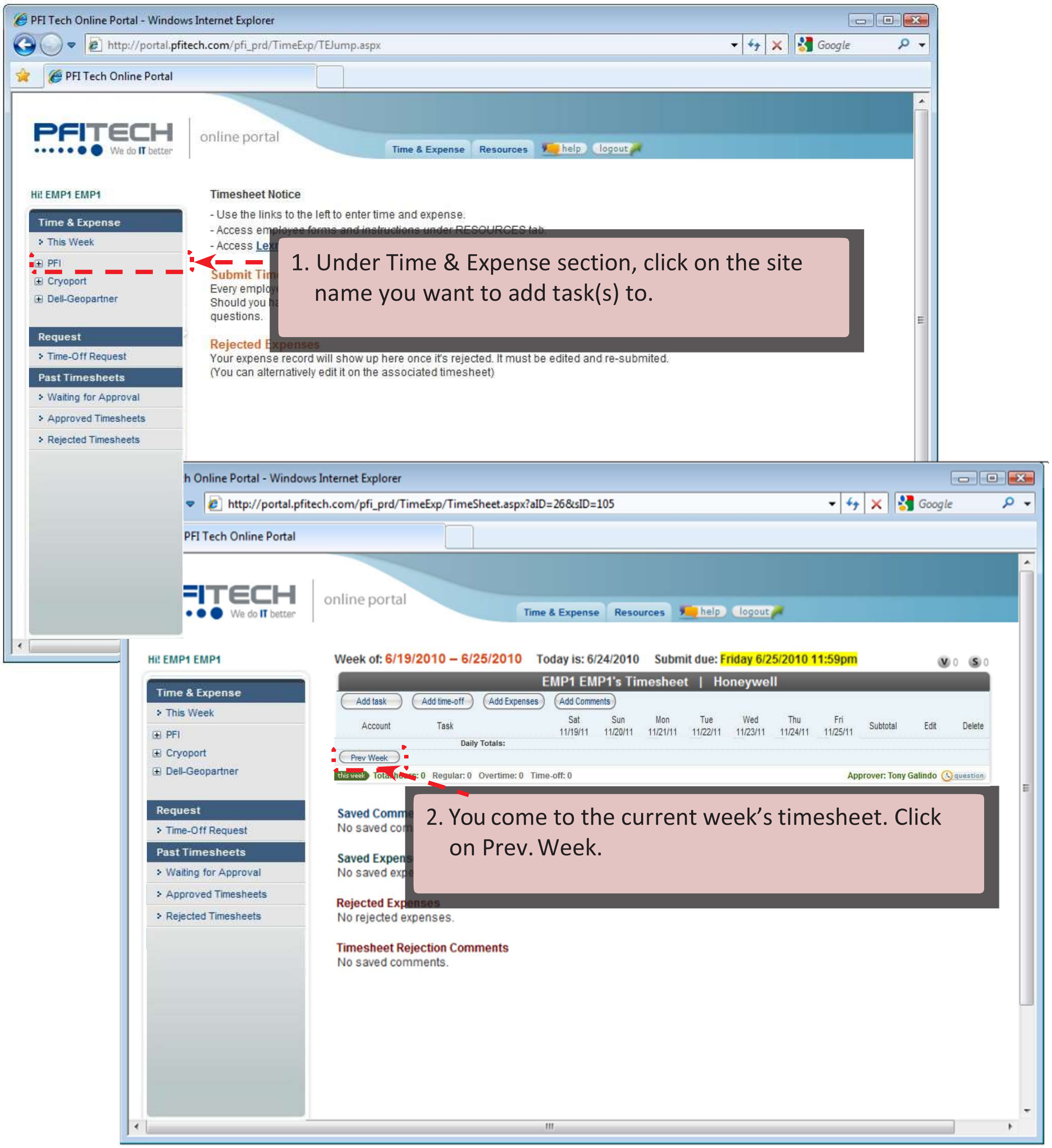
Click the orange X button to delete the entire task/row.

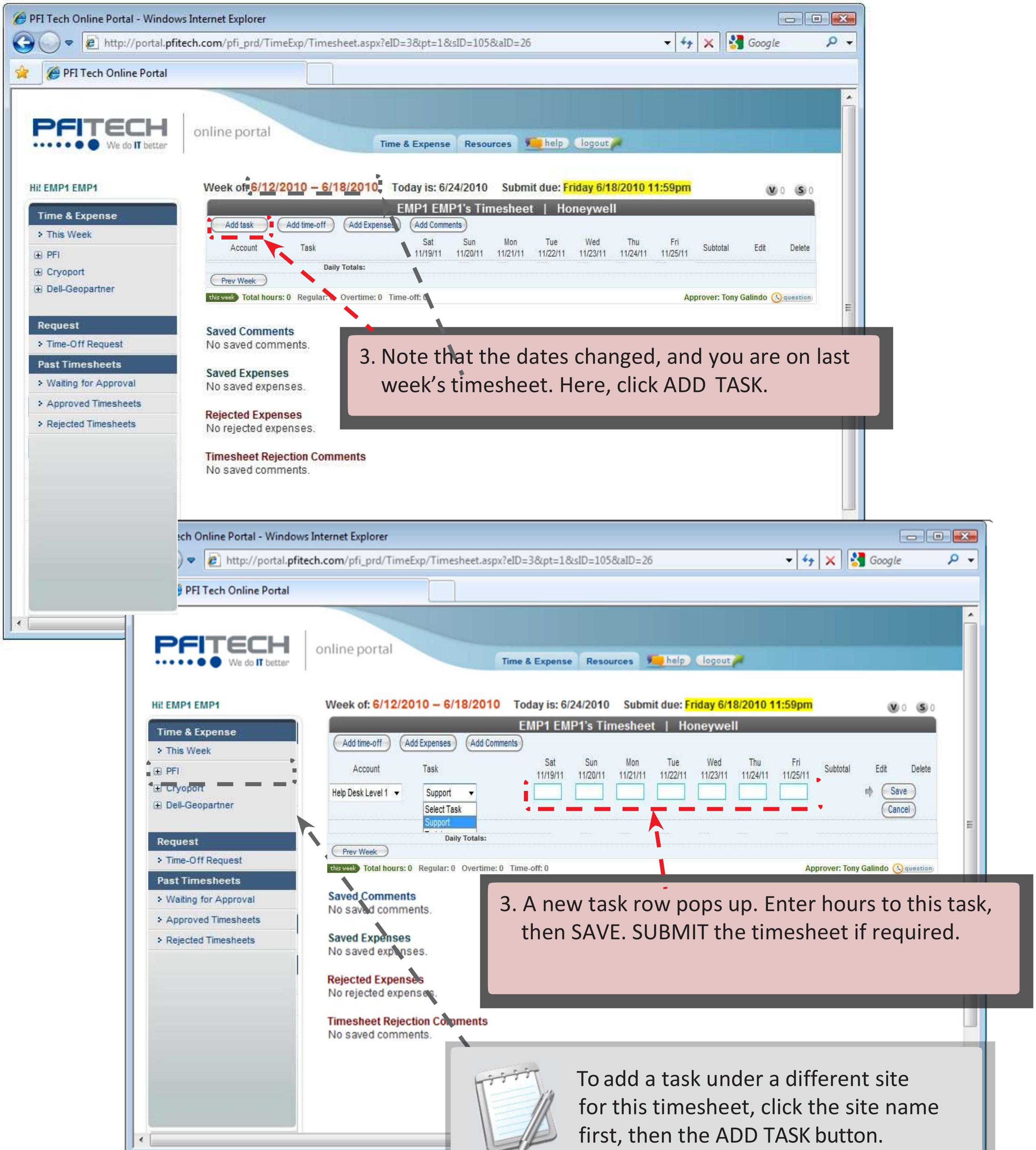
Once clicked and deleted the task/row, hours, expenses, and comments bound to it are permanently deleted.

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)

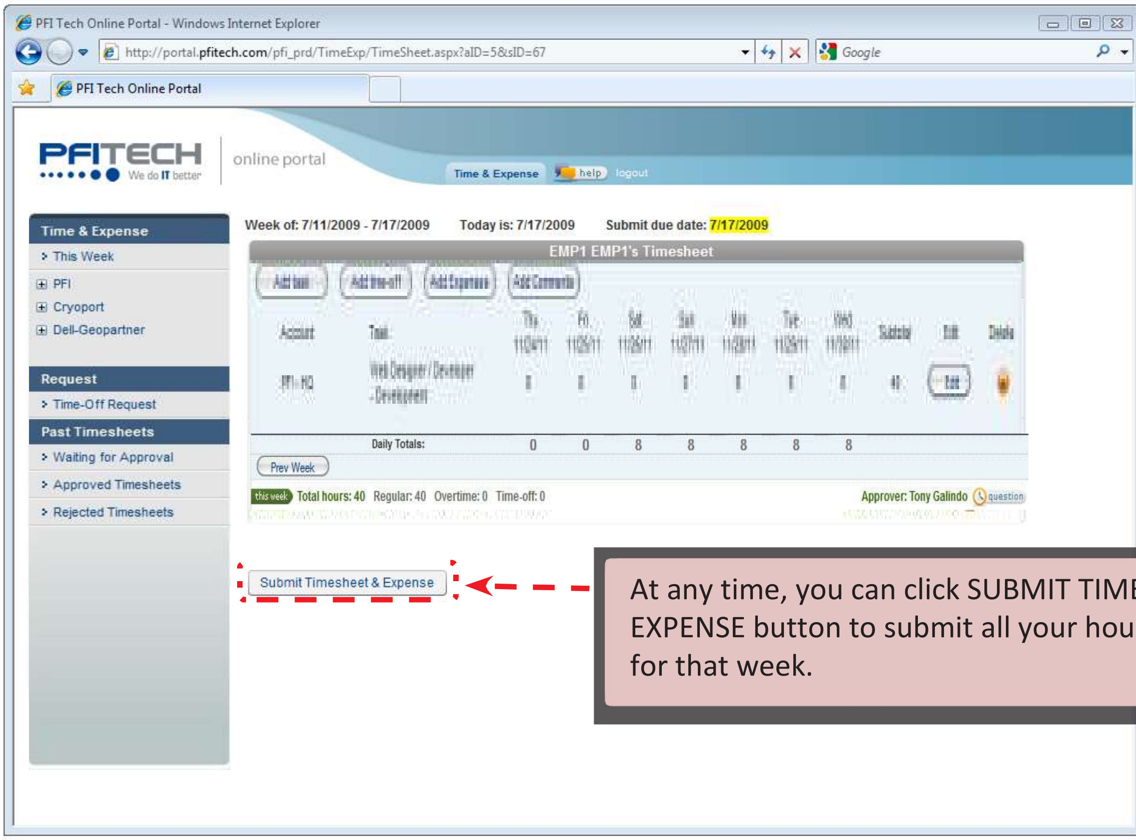




To add a task under a different site for this timesheet, click the site name first, then the ADD TASK button.

Time and Expense Entry

Submission



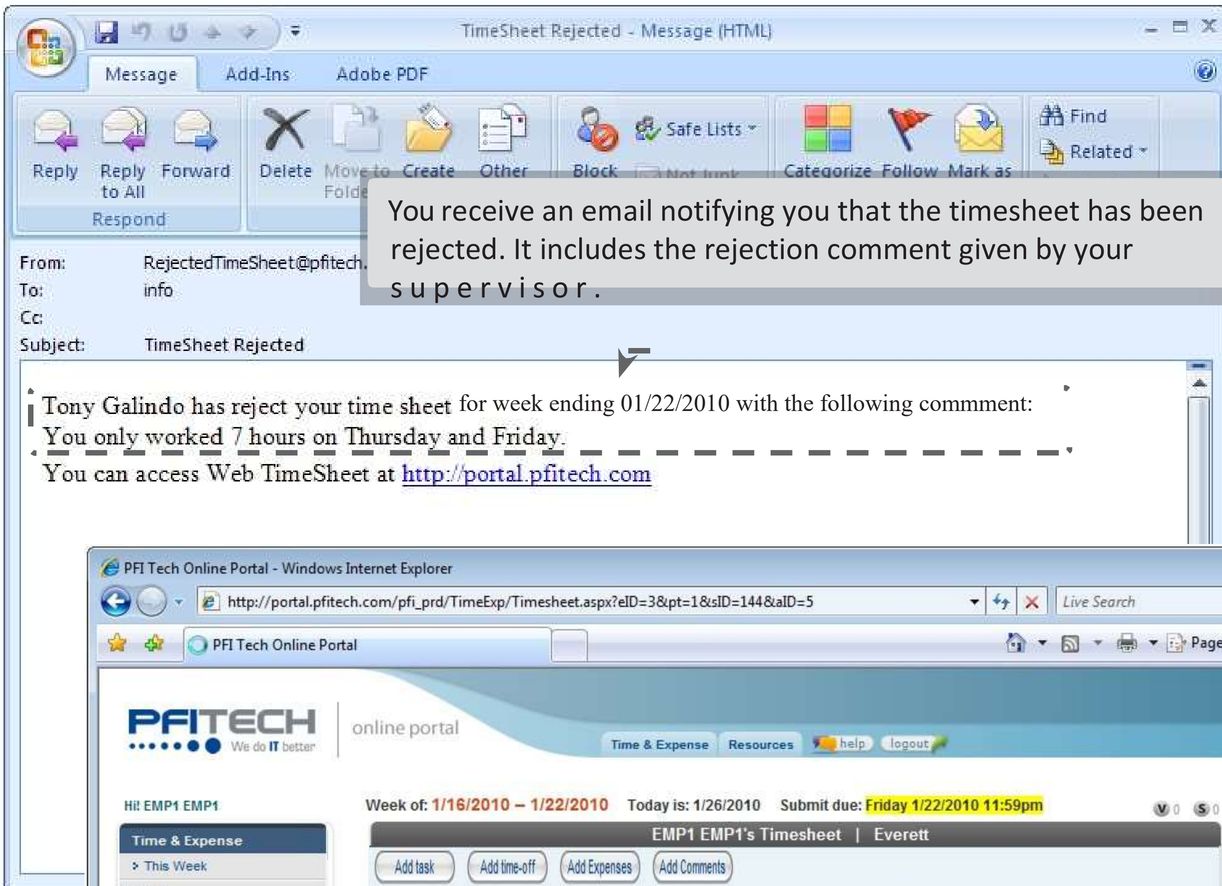
At any time, you can click SUBMIT TIMESHEET & EXPENSE button to submit all your hours and expenses for that week.

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.

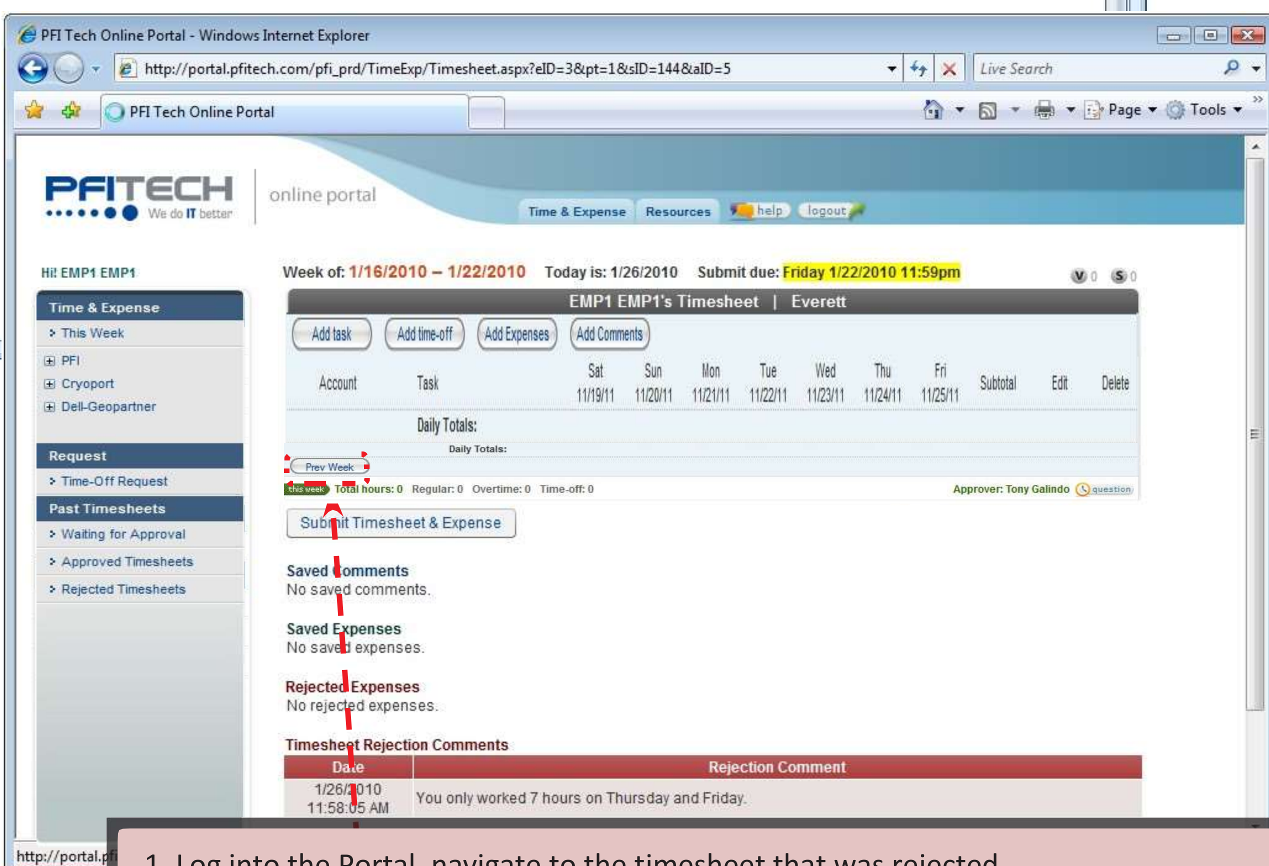
Rejected Submissions

Rejected Timesheets

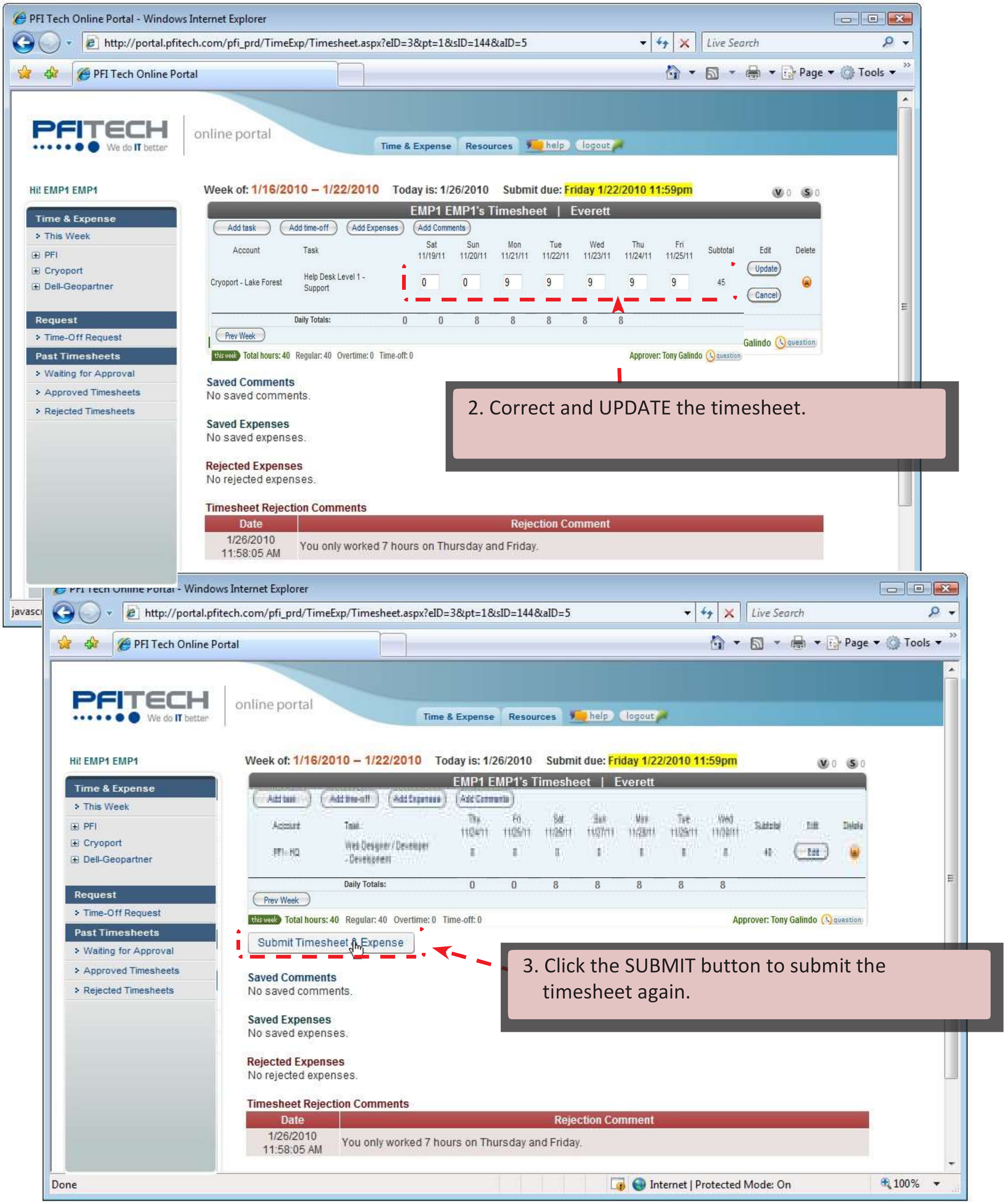
When a timesheet is rejected, an email is automatically sent to you with the supervisor's rejection comment. You must login to the Portal and navigate to that timesheet and correct it, then resubmit it in order to be paid on time.



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

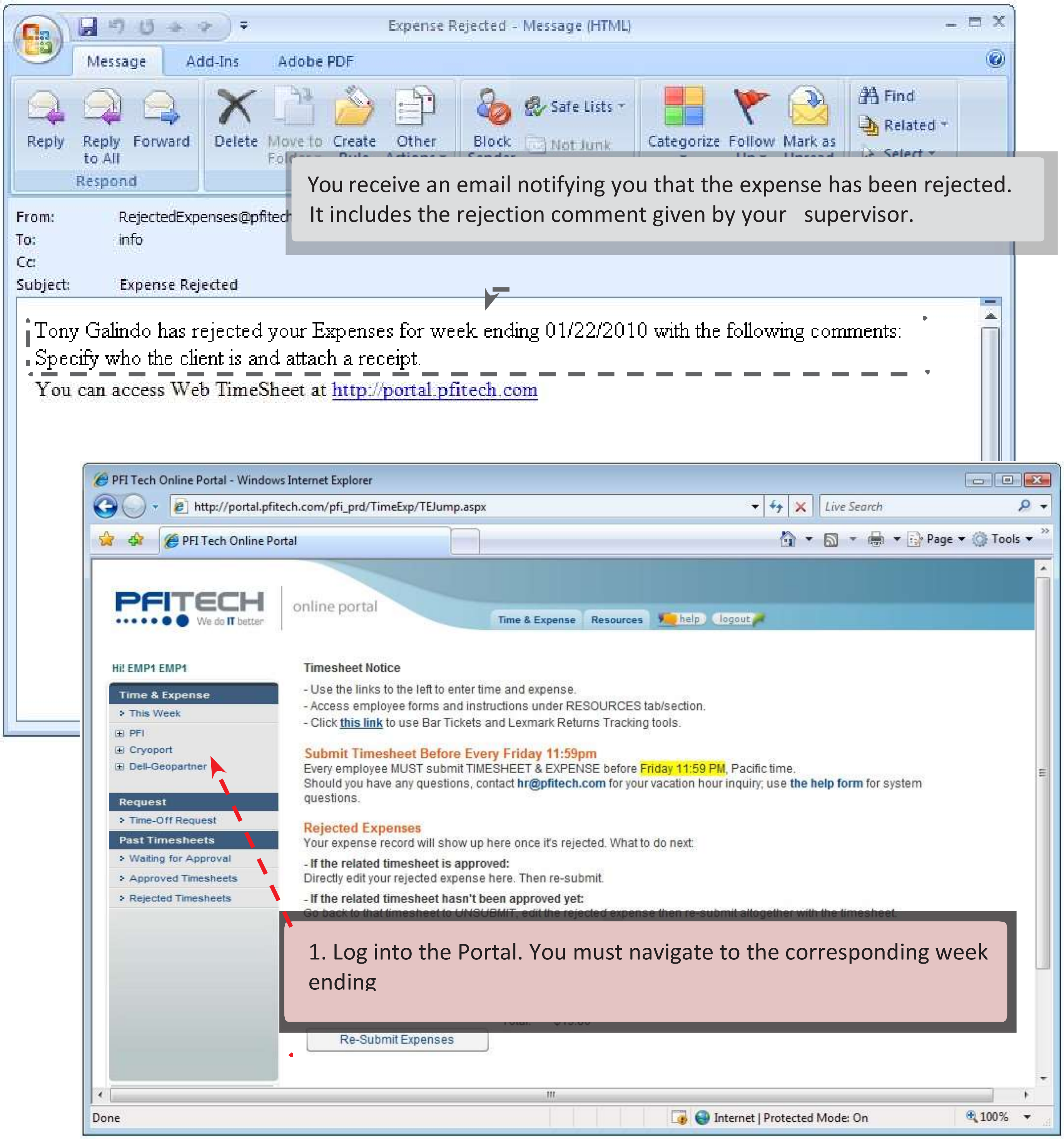


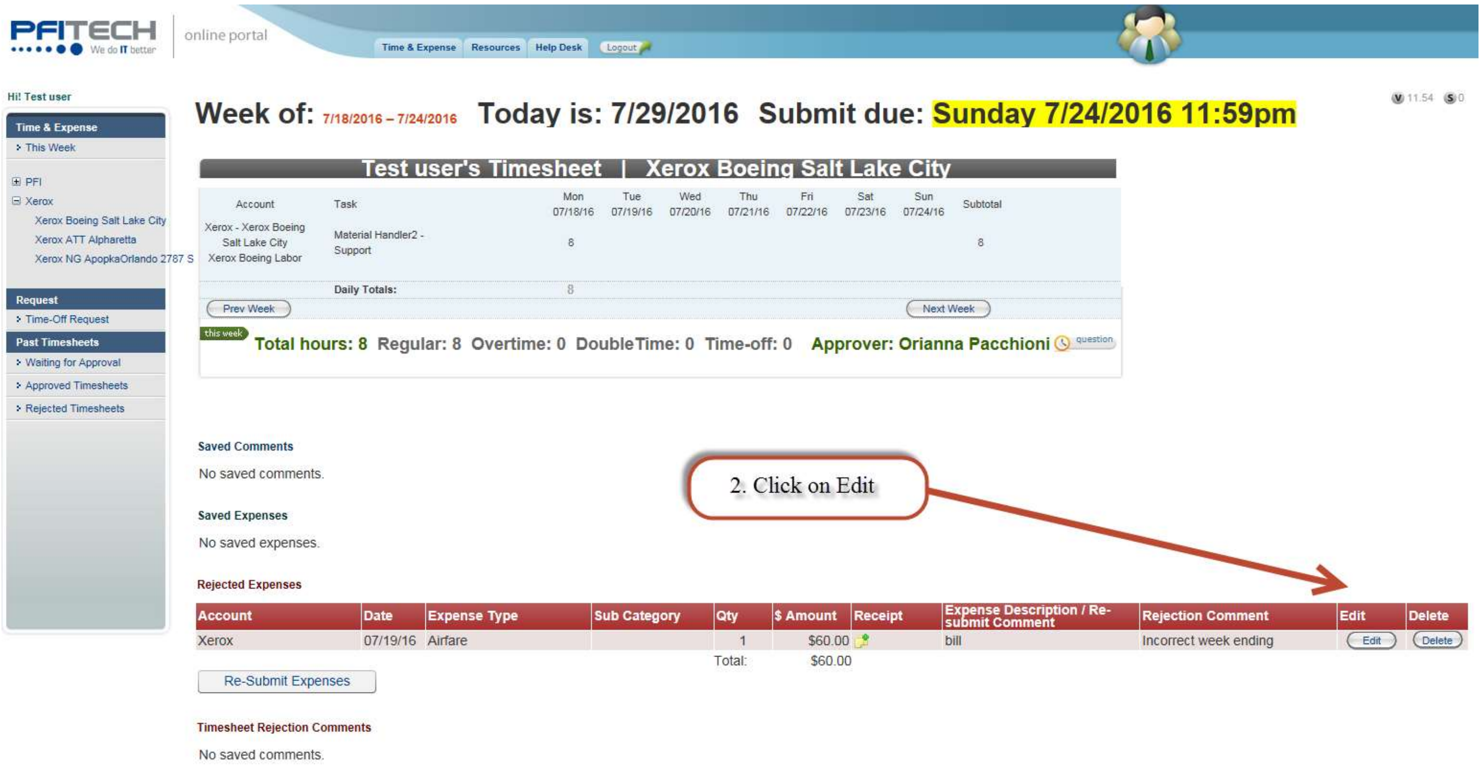
1. Log into the Portal, navigate to the timesheet that was rejected.


PFI Tech Online Portal - Windows Internet Explorer
http://portal.pfitech.com/pfi_prd/TimeExp/Timesheet.aspx?eID=3&pt=1&sID=144&aID=5
online portal
Time & Expense
Resources
help
logout
Hi! EMP1 EMP1
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
Add task
Add time-off
Add Expenses
Add Comments
Cryoport - Lake Forest
Help Desk Level 1 - Support
Update
Cancel
Daily Totals:
Prev Week
Total hours: 40 Regular: 40 Overtime: 0 Time-off: 0
Approver: Tony Galindo
Time & Expense
This Week
PFI
Cryoport
Dell-Geopartner
Request
Time-Off Request
Past Timesheets
Waiting for Approval
Approved Timesheets
Rejected Timesheets
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.
Submit Timesheet & Expense
3. Click the SUBMIT button to submit the timesheet again.
Done
Internet | Protected Mode: On
100%

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.





2. Click on Edit

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