OpenAir

Mobile for iPhone User Guide

Version 2.5

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Introduction

Overview

OpenAir provides OpenAir Mobile for iPhone as an app for exchanging information between your OpenAir account and your iPhone. It allows you to keep your Timesheets and Expense reports up-to-date anywhere and anytime.

Once downloaded to your iPhone, tap the OpenAir icon to load the app, tap on the Timesheets or Expenses items from the dashboard to enter information, press the Home button to perform another task, and then tap the OpenAir icon to reload the app and continue working. When online the information you've been working on is automatically uploaded to your OpenAir account, see Synchronization. Once submitted and uploaded to OpenAir, Timesheets and Expense reports follow the normal approval process in OpenAir. If you have the approvals feature enabled in your account you can also approve Timesheets and Expenses directly from your iPhone.

When your iPhone syncs with your OpenAir account, it downloads current customer, project, and task information as well as your open Timesheets and Expense reports. Standard timesheet functionality is available such as the copy function and expenses functionality is available for creating new Expense reports and receipts. Custom fields are supported in the app and display in the iPhone screens, so you can enter information just as you do in your OpenAir account. See the following:

- Flow of Information
- Getting Started
- Synchronization
- Common Features
- Updating Expenses and Timesheets
- Working with Approvals

Flow of Information

Note the flow of information between your OpenAir account and iPhone:

- **From iPhone to OpenAir** - You create Timesheets and Expense reports on your iPhone locally and your changes are sent to OpenAir during Synchronization. When you submit an Expense report or Timesheet, it is sent to OpenAir and follows the normal approval process in OpenAir. See also Working with Approvals.

- **From OpenAir to iPhone** - Open and rejected Timesheets and Expense reports created in OpenAir are downloaded to your iPhone during Synchronization. Customization information is also sent from OpenAir to your iPhone.

> (i) **Note:** The appearance of your app may differ to this guide. Terminology and fields can be customized in OpenAir and your company settings will be used in the app.

Getting Started

OpenAir Mobile for iPhone employs intuitive procedures familiar to iPhone users.
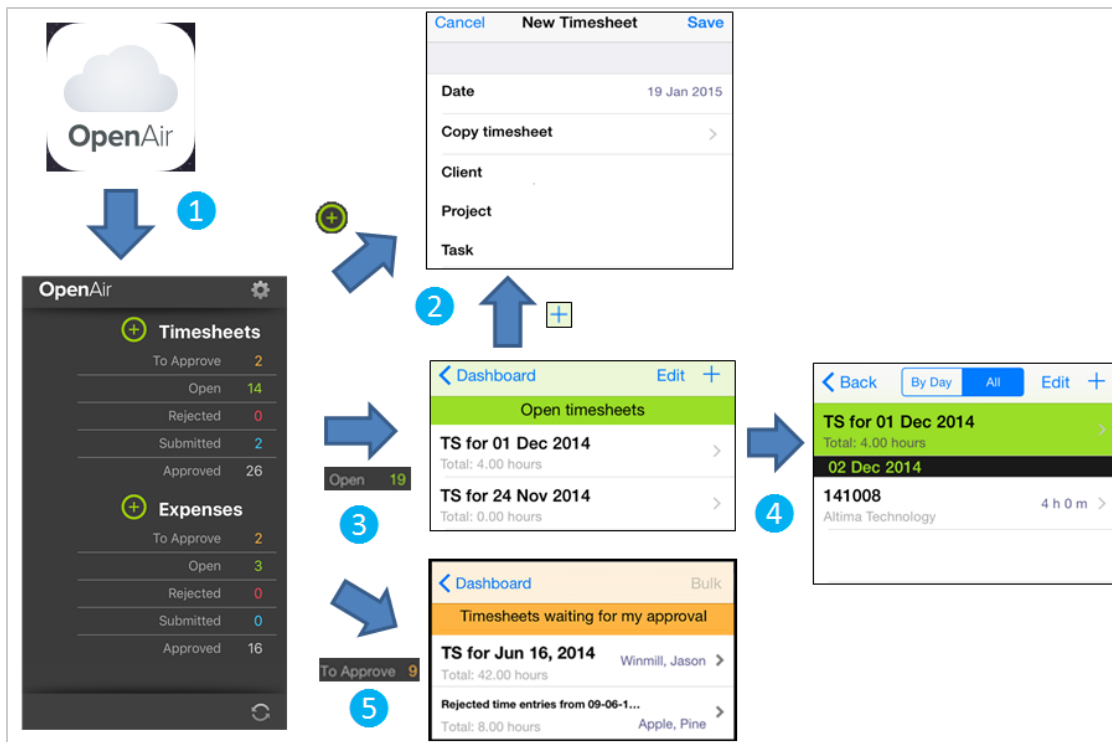
OpenAir

All you have to do is:

1. Tap the OpenAir icon to launch the app. See Installing and Uninstalling.

2. Tap ⊕ to add a new item. See Dashboard.

3. Tap the respective line to view the list of Timesheets or Expenses by status. See Working with Timesheets and Working with Expenses.

4. Tap a line from the list to drill down to the details. See Working with Timesheets and Working with Expenses.

5. Approve or reject items from the To Approve lists. See Working with Approvals.

Dashboard

The dashboard is a central location to manage your Timesheets & Expenses, to change settings, and to force synchronization.
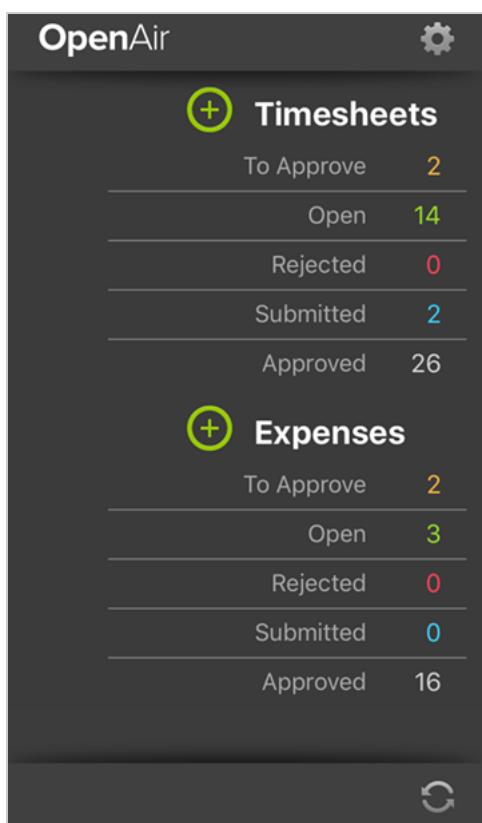
- Tap ⚙ to access the application settings. See Changing Settings.
- Tap ⊕ to add a new Timesheet or Expense, and tap the lines under Timesheet or Expense to view the respective list of items. See Working with Timesheets and Working with Expenses.
- Tap ⟳ to synchronize the OpenAir iPhone app with your OpenAir account. See Synchronization.
- Tap the respective line Open 5 to view the list of Timesheets or Expenses by status.
    - **To Approve** — Timesheets / Expenses submitted for approval to you as an approver (or group of approvers) waiting for your approval/rejection.
    - **Open** — your open Timesheets / Expenses.
    - **Submitted** — your submitted Timesheets / Expenses waiting for approval.
    - **Rejected** — your submitted Timesheets / Expenses rejected by the approver.
    - **Approved** — your Timesheets / Expenses approved by a manager.

    Item counts and headers (Open, Approved, etc.) are color coded so you know where you are as you move through the app.

> ℹ **Note:** You will only see the **To Approve** lines if you have the approval switches enabled in your account, see Working with Approvals.

Synchronization

When online your OpenAir iPhone app will automatically synchronize with your OpenAir account. You will need to manually synchronize your app after installation and when your app has been offline. Refer to the following procedures:

- Connect to OpenAir
- Refresh List View
- Refresh all data

Connect to OpenAir

The first time you use OpenAir Mobile for iPhone, perform the initial setup to synchronize the OpenAir iPhone app with your OpenAir account. This downloads OpenAir customer, project and task information as well as any open Timesheets and Expense reports. Keep in mind that initial synchronization takes longer than it will in future use.

The OpenAir account information you enter for initial synchronization can be changed at a future time if your OpenAir login information changes. See Changing Settings.

To connect your OpenAir Mobile for iPhone app to your OpenAir account:

1. Click the OpenAir icon to launch the application.

   The Connection Settings screen appears.

Cancel	**Connection Settings**	Sync
	Please enter your login credentials:	
Company		
User ID		
Login method	SSO	Password
Password		
Remember Me	Yes	No
Server	https://www.openair.com	

⚠ **Important:** If you enable the Remember Me option, your Oracle Service password and/or session id will be stored on your Device and encrypted using industry standard security measures. Anyone with access to your unlocked device will be able to access your Oracle Service account using your Device; a person having access will be able to view, add, and edit information in your Oracle Service account. As a precaution, you should always utilize a passcode lock on your Device and change your password regularly. If your Device is lost or stolen, you must immediately report the incident to your Oracle account administrator and change your Oracle Service password. By enabling the Remember Me option, you accept full responsibility for any losses and/or damages, and you agree not to hold Oracle or its affiliates liable for any losses and/or damages resulting from saving your password and/or session information.

2. Enter Company, User ID, and Server.

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> ⚠️ **Important:** It is recommended to use a secure (https) connection. A secure connection will be defaulted unless you explicitly specify an unsecure (http) connection. You will see a warning if you enter an unsecure connection. The Remember Me option is only available for secure connections.

3. Select the Login method. See To enable single-sign on: for more details.

4. Enter your password as required.

5. Tap Sync to perform the update with OpenAir.

    Syncing progress messages display.

    The initial synchronization may take a while since the app downloads all data. Subsequent updates process much faster.

> ℹ️ **Note:** If you are using an older version of the iPhone device or are not using an upgraded operating system that supports background processing, you may receive the following message during the update: Sync requires uninterrupted time to complete. Please wait until successfully finished.

Synchronize with the latest server data

To sync with the latest server data:

1. Click on the ⟳ at the bottom of the Dashboard to update the iPhone with the latest server data. This action will sync timesheets, expenses, clients, projects, tasks and other items from the server.

2. Notice the sync messages that display.

> ℹ️ **Note:** You can continue working with timesheets and expenses as the synchronization continues in the background.

Refresh List View

List data is automatically synchronized as you move between screens. The ⟳ indicator shows that the synchronization is in progress.

If you stay on the same screen for a long time the data may become out of date. Refer to the following procedure to force a list to refresh.

To refresh a list view:

1. Swipe down on the dashboard or any other list view to refresh the data displayed in the list view .

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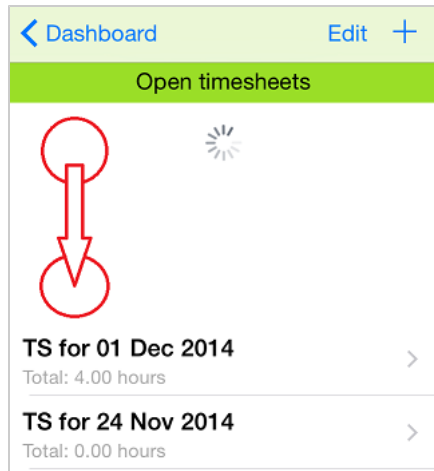
If a complete refresh is running then the list view refresh waits until the complete refresh is finished.

Synchronization states

There are various sync states when syncing in real-time or when the app is offline:

- **Pending** - ⇑ indicates that an action that has yet to be applied because your iPhone is offline.
- **Sync failed** - ❗ indicates that the process of exchanging data with the server was interrupted, for example, because your iPhone connection dropped.
- **Sync conflict** - ⚠ indicates that Conflict resolution has been automatically applied.

Common Features

Title Bar Buttons

Screens have title bars with additional buttons for key functions. The title bars are color coded by status for ease of identification.
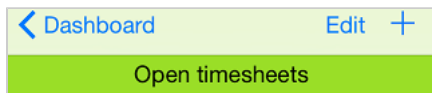
- **Dashboard** - Tap to return to the Dashboard.
- **Back** - Tap to return to the previous screen.
- **Edit** - Tap to enter the edit mode where you can select items to delete.
- **Done** - Tap to return from edit mode.
- **+** - Tap to add a new item.
- **Save** - Tap to save your changes. If you are working offline your changes will be sent to your OpenAir account the next time you synchronize. See Updating Expenses and Timesheets.
- **Cancel** - Tap to ignore the changes made on the screen.

Delete Icons

The Timesheets and Expenses screens can be switched into an edit mode to allow the deletion of Timesheets and Expense reports. See Delete a Timesheet or Delete an Expense Report for details.
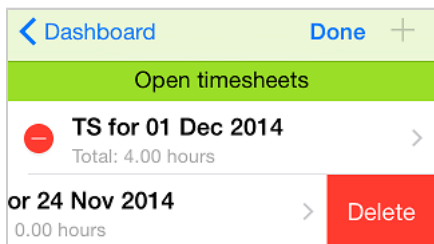
Tap the Done button when finished to return back to the list mode.

Screen Fields

The following conventions are used:

- **Gray text** - Identifies display only fields.
- ***** - An asterisk identifies fields that must have a value before you can save the screen.
- **>** - Indicates a further screen to enter the field value.

Updating Expenses and Timesheets

Timesheets and Expense reports are automatically synchronized when your iPhone is connected to OpenAir. If they are open, you can work on them in either application, save your changes, and the additional or modified information is exchanged. If they are submitted, you can transfer them from iPhone to OpenAir and they follow the normal approval process in OpenAir.

If your iPhone is offline then tap the ⟳ button at the bottom of the Dashboard and your iPhone communicates with your OpenAir account and exchanges information in both directions. You can use Update at any time.

Default Form Values from Web Application Respected in Mobile Application

OpenAir Mobile for iPhone respects default values set for envelope submission forms, timesheet submission forms, receipts, and timesheets in the OpenAir Web application. Form defaults do not apply to time entry forms or envelope forms.

OpenAir

Installing and Uninstalling

It is easy to install and uninstall OpenAir Mobile for iPhone. Refer to the procedures that follow.

Installing OpenAir Mobile for iPhone

To install OpenAir Mobile for iPhone, access and download the app through the iTunes App Store or using the links provided in your OpenAir account for add-on services.

To download the free app:

▪ Open the iTunes App Store on your iPhone or in iTunes and search for OpenAir Mobile. Install the application.

 OR

▪ In OpenAir, navigate to Administration > Global Settings > Integration: Add-on services. Click the link under OpenAir for iPhone to Download with iTunes.

> (i) **Note:** To use OpenAir Mobile for iPhone, ensure your OpenAir user account is configured for exchange access to OpenAir Mobile (iPhone). See Administration.

Uninstalling OpenAir Mobile for iPhone

To uninstall OpenAir Mobile for iPhone:

1. Tap and hold the OpenAir icon.

 An X appears on the OpenAir icon.
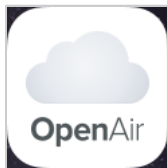
2. Tap ⊗ to continue to uninstall.

 A prompt appears.

3. Tap Delete to confirm deletion.

 The app is deleted from your iPhone.

OpenAir

Changing Settings

Use the Settings screen to change your login credentials, set your preferences, and force a refresh of the data held on your iPhone. You can also see the version of the app and view the end user license agreement from this screen.

> ℹ **Note:** You will need to change your iPhone settings to match any login credentials and server information changes made to your OpenAir account.

Refer to the following procedures:

- Access Settings
- Change Login settings
- Time entry units
- Refresh all data
- Conflict resolution
- About

Access Settings

The Settings screen is accessible from the Settings icon on the Expenses and Timesheets menus.

To access Settings:

1. Tap ⚙ at the top of the Dashboard and the iPhone Settings screen appears.
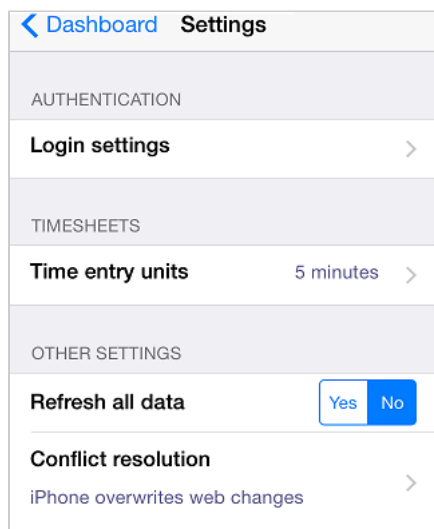
2. After you have made your changes, tap the Update button and perform a Synchronization. The app performs a full sync and overwrites all information if required.

> ℹ **Note:** After syncing the Refresh all data option is automatically set to 'No'.

Change Login settings

To change your Login setting:

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1. Navigate to the Settings screen. See Access Settings.
2. Tap Login settings and your current information appears.
3. Tap on the setting you would like to change and the keyboard will be displayed. Type in the new value. See Synchronization.
4. When done, tap the Sync button and the changes will be saved.

Time entry units

Time entry units set the step interval used by the time picker control. See Edit a Time Entry.

To change time units used in Timesheets:

1. Navigate to the Settings screen. See Access Settings.
2. Tap Time entry units and tap the required time interval from the screen.
3. When done, tap the Save button and the changes will be saved.

Refresh all data

Checking the Refresh all data option causes the app to repeat the initial Synchronization. Once the synchronization has been performed the option is automatically unchecked. Use this option if items such as customers, projects, and tasks are missing from your list view.

To set Refresh all data:

1. Navigate to the Settings screen. See Access Settings.
2. To refresh all list data, tap 'Yes'.
3. Exit the screen and the app performs a full sync with your OpenAir account.

> ⓘ **Note:** The Refresh all data switch automatically resets itself to 'No' after this synchronization.

Conflict resolution

The iPhone app uses the conflict resolution setting when your iPhone app and your OpenAir account contain different records or different versions of the same record. This can occur when you modify a record in both your iPhone app and in your OpenAir account prior to Updating and Syncing them. It also occurs when you delete a record in one location, and modify the same in the other location

1. Navigate to the Settings screen. See Access Settings.
2. Tap Conflict resolution and tap the required setting from the screen.

> ⓘ **Note:** In conflict resolution settings, Web refers to your OpenAir account. When you select Web overwrites iPhone changes, you designate it as the primary account. In the event there is a discrepancy between an iPhone record and an OpenAir record, this setting allows the iPhone app to make both records identical using your OpenAir account as the basis. If you select iPhone overwrites web changes, the same action occurs except that the record is copied from your iPhone account to your OpenAir account.

3. When done, tap the Save button and the changes will be saved

About

The About section of the Settings screen shows the OpenAir version and provides access to the End user license agreement (EULA).

To view the End user license agreement:

1. Navigate to the Settings screen. See Access Settings.
2. Scroll down to the About section.
3. Tap End user license agreement.

OpenAir

Working with Expenses

Tap the respective line to view the list of Expenses by status from the Dashboard. As in your OpenAir account, there are a number of tasks you can perform using OpenAir Mobile for iPhone. Exchange new and modified Expense reports between iPhone and OpenAir. Submit Expense reports for approval. You can also add an image attachment to Expense reports and receipts. Refer to the following procedures.

- Create an Expense Report and Add Receipts
- Add an Image Attachment to Expense report and Receipts
- Submit an Expense Report
- Edit an Expense Report
- Edit a Receipt
- Delete a Receipt from an Expense Report
- Delete an Expense Report

Create an Expense Report and Add Receipts

Use OpenAir Mobile for iPhone to keep your expenses current. You can create an Expense report and add receipts to it. If circumstances change, you can easily modify those receipts before you submit the Expense report for approval.

To create an Expense report and add and modify receipts:

1. Tap ⊕ from the Dashboard or **+** from the **Open expenses** lists.

   A New Expense report screen appears.

   > **ℹ️ Note:** If the **One project per expense report** switch is enabled for your account, you will also see Client and Project lines.

2. Tap each entry line and enter information in the New Expense report. Tap Save.

3. Tap **+** at the top of the New Expense report screen and the Edit Receipt screen appears.

   This includes the same information as the receipt form in your OpenAir account. If custom fields are used there, they are also used in the app.

> **Note:** The Client and Project lines are display only and taken from the Expense report if the **One project per expense report** switch is enabled for your account.

4. Tap each entry line and enter information.

> **Note:** The fields available in your iPhone app (for example, the "payment type" field) are set by your Administrator and correspond to the fields available in the web version of OpenAir.

5. Tap 📎 to add an image to the receipt. See Add an Image Attachment to Expense report and Receipts.

6. Tap **Save and create another** to add another receipt and repeat the process until done. Tap Save.

   The Expense report with all of the receipts appears.

7. To modify any of the receipts, tap on it. The Edit Receipt screen appears. Tap on the line you would like to change and details display. Make the desired changes and tap Save.

8. Once you have created an Expense report and added receipts, you can:
   - Send an Expense Report to OpenAir. See Updating Expenses and Timesheets.
   - Add an Image Attachment to Expense report and Receipts
   - Submit an Expense Report
   - Edit an Expense Report
   - Edit a Receipt
   - Delete a Receipt from an Expense Report
   - Delete an Expense Report

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To set exchange rates to use with a receipt

If you are using multi-currency receipts, you will have the option to select which exchange rate the app will use.

1. Navigate to the Edit Receipt screen.
2. Select "Yes" for Foreign currency.
3. On the Currency line, tap the > icon and scroll to select your desired currency.
4. Select whether you want to override the server exchange rate.
   - If Exchange rate override is set to "No", the app will use the server exchange rate for the date of the receipt.
   - If Exchange rate override is set to "Yes", the app will use the exchange rate which you enter in the Exchange rate field.

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Cancel	Edit Receipt	Save

Notes   >

CURRENCY INFORMATION

Foreign currency   Yes   No

Currency   AED   >

Exchange rate override   Yes   No

Exchange rate   0.2723

Refresh   Server will update rate automatically

ADDITIONAL FIELDS

receipt_custom_issue   >

Save and create another   📎

Additional information on Payment Type and Payment Status

If your OpenAir account allows you to select a Payment type in receipts, the default payment type and payment type settings in the app are the same as used in the server. Available payment statuses (i.e. reimbursable or non-reimbursable) and the default payment status are also based on the server settings.

OpenAir

Add an Image Attachment to Expense report and Receipts

Use OpenAir Mobile for iPhone to add an image attachment from your iPhone's camera or photo library to Expense reports and receipts.

> ⚠️ **Important:** Do not attach receipt pictures with unmasked credit card or other private data.

To add an image attachment from either the Expense report or receipt screen:

1. Tap 🔗 to display the list of attachments associated with the item.
2. If you are not automatically prompted to select an image, tap the camera 📷 button. Choose whether to attach an image from your device's library or take a new picture.
3. Once you have chosen an image to attach or taken your picture, it appears in the collection of image attachments for the Expense report or receipt.

   > ℹ️ **Note:** Pictures you take with the iPhone camera are automatically saved to your photo library. The size of the file attached via the iPhone is usually 0.5 - 1 MB. It is a compressed JPG image, stored in iPhone's camera default resolution of 1600 x 1200.

4. To delete an image, tap the Edit button and touch the close box ❌ over any image you wish to delete.
5. To change the name of an attachment you added from the iPhone's camera or photo library, tap anywhere on the image and enter a name using the on-screen keyboard.

   > ℹ️ **Note:** The name of an attachment added via the Web application cannot be edited using the iPhone.

6. Tap Done.

   Keyboard no longer appears.

7. To download image attachments that were uploaded online to your device, go to the attachments collection for an item and tap the item that you wish to download.

   > ℹ️ **Note:** You can only download image attachments. Other file types, such as PDF and DOC, do not display.

Submit an Expense Report

Once you have created an Expense report and added one or more receipts, use OpenAir Mobile for iPhone to submit the Expense report. When in OpenAir, it follows the normal approval process.

To submit an Expense report:

1. Tap on the Expense report you would like to submit from the Dashboard list.
2. Tap Submit. It appears on the bottom left.

   The Submit screen appears allowing you to add additional information.

3. If desired, enter information for Additional emails and Notes to approver. Select whether Submit on warning is On or Off. As with OpenAir, Expense reports can be submitted with a warning.

4. Tap Done.

   The Add Receipt screen appears with a list of receipts in the Expense report.

5. To continue, tap Expenses.

   The Expense report is in queue for submission and is marked as Submitted.

6. Once you have submitted an Expense report, you can transfer the submitted Expense report to your OpenAir account. See Updating Expenses and Timesheets

Edit an Expense Report

Use OpenAir Mobile for iPhone to edit Expense report information.

To edit an Expense report:

1. Tap on the Expense report you would like to edit from the Dashboard list.

   The Edit Expense report screen appears. This includes the same information as the Expense report form in your OpenAir account. If custom fields are used there, they are also used in the app.
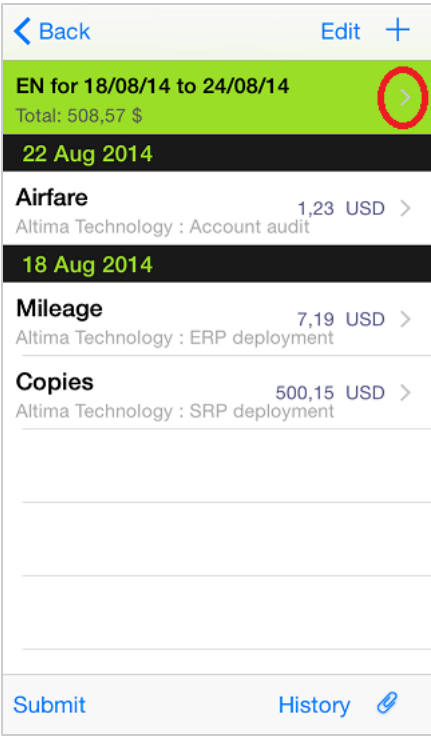
2. Tap on the Expense report header.

    The Edit Expense report screen appears.

> ⓘ **Note:** If the **One project per expense report** switch has been enabled for your account, you will also see Client and Project lines.

3. Tap the line you would like to change. When done, tap Save.

> **Note:** You can edit a submitted expense report if you have a role which allows you to do so. Otherwise, you cannot edit an expense report which has been submitted. However, if your approver rejects the expense report, it will be returned to the **Rejected** category of the iPhone app and you can then edit it. If your approver only rejects some (and not all) of the receipts in your submitted expense report, the rejected receipts are returned to you in a new expense report in the **Open** category of the app, and can be edited and resubmitted from there.

Edit a Receipt

Use OpenAir Mobile for iPhone to edit receipts that are in an Expense report.

To edit a receipt:

1. Tap the Expense report with a receipt you would like to edit from the Dashboard list.
2. Tap the receipt you would like to edit.

   The Edit Receipt screen appears.

Cancel	Edit Receipt	Save
Expense item *		>
Date *	03 Mar 2015	>
Tracking # *	1	>
Quantity *	1	>
Cost *	0,00	>
Client *		
Project *		>
Status	Reimbursable	>
Billable receipt	Yes No	
Save and create another	🔗	

> **Note:** The Client and Project lines are display only and taken from the Expense report if the **One project per expense report** switch is enabled for your account.

3. Tap the line you would like to change. When done, tap Save.
4. Tap 🔗 to add an image to the receipt. See Add an Image Attachment to Expense report and Receipts.

Delete a Receipt from an Expense Report

Use OpenAir Mobile for iPhone to delete a receipt from an Expense report that has not been submitted.

To delete a receipt from an Expense report:

1. Tap the Expense report with a receipt you would like to delete from the Dashboard list.
2. Tap Edit and tap ⊖ next to the receipt OR swipe your finger right to left.

   Delete appears to the right of the receipt.

   > ⓘ **Note:** To remove the Delete, tap the line but NOT the delete button.

3. Tap Delete and the receipt is deleted. The receipt no longer appears in the Expense report.

Delete an Expense Report

Use OpenAir Mobile for iPhone to delete an Expense report that has not been submitted.

To delete an Expense report:

1. Tap to show the list of open expense reports from the Dashboard.
2. Tap Edit and tap ⊖ next to the expense report name OR swipe your finger right to left.

   Delete appears to the right of the expense report name.

3. Tap Delete and the expense report is removed from the Expense report list. The name no longer appears.

   > ⓘ **Note:** To remove the Delete, tap the line but NOT the delete button.

OpenAir

Working with Timesheets

Tap the respective line to view the list of Timesheets by status from the Dashboard. As in your OpenAir account, there are a number of tasks you can perform using OpenAir Mobile for iPhone. Create Timesheets and exchange new and modified Timesheets between iPhone and OpenAir using Update. Submit Timesheets for approval. Refer to the following procedures.

- Create a Timesheet and Add Time Entries
- Copy a Timesheet
- Submit a Timesheet
- Edit a Timesheet
- Edit a Time Entry
- Delete a Time Entry from a Timesheet
- Delete a Timesheet

Create a Timesheet and Add Time Entries

Use OpenAir Mobile for iPhone to keep your Timesheets current. You can create a Timesheet and add time entries to it. If circumstances change, you can easily modify the time entered before you submit the Timesheet for approval.

To create a Timesheet and add or modify time entries:

1. Tap ⊕ from the Dashboard or **+** from the **Open timesheets** lists.

   A New Timesheet screen appears.

2. Tap each entry line to enter information in the New Timesheet. Tap Save.

3. Tap the Customer, Project, and Task line to display the Edit screen and add customer, project, and task information.

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Tap Customer, Project, and Task on the top part of the screen to highlight it and scroll down to the desired value on the bottom. Tap it and tap Save.

4. When complete, tap Save. You can then add time entries to the Timesheet.

A calendar displays the Timesheet interval.

> **Note:** You can choose the timesheet display: By Day displays an entry for a specific date and All displays a list of all time entries.

5. To add time, tap **+** at the top of the screen.

The "New time entry" screen appears.

OpenAir

6. Tap "Blank time entry" to create a new time entry with no information pre-populated. If you want to pre-populate the timesheet with project, task, client, or other fields copied from previous timesheets or unique time entries entered in the timesheet, tap one of the clients and projects in the "Pre-populate data from" column. The "New Time Entry" screen will then allow you to enter details for the time entry.

7. Tap the Time line to display the Edit Time screen. Scroll to the number of hours and minutes and tap Save.

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> **Note:** The values displayed in the Time line are the same as the values in your OpenAir web account. For example, if your company rounds time to 15 minutes, this will limit the times which you can select to ones with 15–minute intervals. You can further set which time intervals are used on your mobile device by navigating to Settings and setting the Time entry units. You can only set time entry units which are higher multiples of the interval allowed by the server. For example, if your company rounds time to 15 minutes, you can use 15 minutes, 30 minutes, or 60 minutes on your mobile device.

The New Time Entry screen appears and the hours and minutes are added.

8. Tap any of the items on the New Time Entry screen to add or change information. Tap Save.

9. Once you have created a Timesheet and added time entries, you can:

   - Send a Timesheet to OpenAir. See Updating Expenses and Timesheets.
   - Submit a Timesheet
   - Edit a Timesheet
   - Edit a Time Entry
   - Delete a Time Entry from a Timesheet
   - Delete a Timesheet

Creating Linked Timesheets

By default, you must manually create two timesheets for periods which include parts of two months. For example, if half of the week occurs in the end of January, and the second half of the week occurs in the beginning of February, you must create timesheets for the portion of the week which occurs in January and the portion which occurs in February.

As of OpenAir Mobile for iPhone version 2.5.0, it is possible to create linked timesheets automatically by creating one timesheet for the period, irregardless of whether the period is split between two months. To enable this feature, please contact OpenAir Support and request the **Auto-Create Linked Timesheets for OpenAir Mobile for iPhone** feature.

When this feature is enabled, OpenAir Mobile for iPhone creates timesheets for each period. The timesheet name indicates which month the partial timesheet belongs to.

OpenAir

> **ⓘ** **Note:** When the **Auto-Create Linked Timesheets for OpenAir Mobile for iPhone** feature is enabled, using the calendar navigation automatically displays the timesheet for the correct time period (for example, the January portion or February portion of the timesheets above).

Copy a Timesheet

Use OpenAir Mobile for iPhone to copy a Timesheet you created previously and add time entries to the new Timesheet. If circumstances change, you can easily modify the time entered before you submit the Timesheet for approval.

To copy a Timesheet and add or modify time entries:

1. Tap ⊕ from the Dashboard or **+** from the **Open timesheets** lists.

   A New Timesheet screen appears.

2. Tap the **Copy timesheet** line.

   The Copy Timesheet screen appears.

3. Tap Copy Timesheet. Scroll to the Timesheet you want to copy and tap it.
4. Tap Copy hours. Scroll to the required option and tap it.

5. Tap Save and New Timesheet appears.

6. Add or change any information and tap Save.

   A calendar displays the timesheet interval. Timesheet information also appears based on the options you selected.

> **⚠ Note:** You can choose the timesheet display: By Day   displays an entry for a specific date and All displays a list of all time entries.

7. To change time entry information, tap the entry you would like to change.

   The Edit Time Entry screen appears.

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8. Tap the Time line to display the Edit Time screen. Scroll to the hours and minutes and tap Save.

   The New Time Entry screen appears and the hours and minutes are added.

9. Tap any of the items on the New Time Entry screen to add or change information. Tap Save.

10. Once you have created a new Timesheet and added time entries, you can:

   ■ Send a Timesheet to OpenAir. See Updating Expenses and Timesheets.

   ■ Submit a Timesheet

   ■ Edit a Timesheet

   ■ Edit a Time Entry

   ■ Delete a Time Entry from a Timesheet

   ■ Delete a Timesheet

Submit a Timesheet

Once you have created a Timesheet, you have the option to submit it to your OpenAir account for approval. When in OpenAir, it follows the normal approval process.

To submit a Timesheet:

1. Tap on the Open or Rejected Timesheet you would like to submit from the Dashboard list.

2. Tap Submit. It appears on the bottom left of the screen.

   The Submit screen appears allowing you to add additional information.

3. If desired, enter information for Additional emails and Notes to approver. Select whether Submit on warning is On or Off. As with OpenAir, Timesheets can be submitted with a warning.
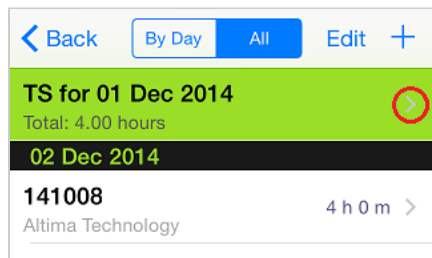
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4. Tap Done.

> ⓘ **Note:** Timesheets which you have submitted through the iPhone app cannot be edited once submitted. However, they can be edited if first rejected by your approver.

Edit a Timesheet

Use OpenAir Mobile for iPhone to edit Timesheet information.

To edit a Timesheet:

1. Tap on the Timesheet you would like to edit from the Dashboard list.

    The Edit Timesheet screen appears.

2. Tap on the Timesheet header.

    The Edit Timesheet screen appears.

3. Tap a line you would like to change. When done, tap Save.

Edit a Time Entry

Use OpenAir Mobile for iPhone to edit time entries in a Timesheet.

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To edit a time entry:

1. Tap on the Timesheet with the time entry you would like to edit from the Dashboard list.
2. Tap the Timesheet with a time entry you would like to edit.

    The Edit Time Entry screen appears.

3. Tap the line you would like to change. When done, tap Done.

Delete a Time Entry from a Timesheet

Use OpenAir Mobile for iPhone to delete a time entry from a Timesheet that has not been submitted.

To delete a time entry from a Timesheet:

1. Tap the Timesheet with a time entry you would like to delete from the Dashboard list.

    The screen displays either all time entries in the Timesheet or if By day is selected, the time entry for the date selected.

2. Tap Edit and tap ⊖ next to the time entry name OR swipe your finger right to left.

    Delete appears to the right of the time entry.

> ⓘ   **Note:**   To remove the Delete, tap the line but NOT the delete button.

3. Tap Delete and the time entry is deleted. The time entry no longer appears.

Delete a Timesheet

Use OpenAir Mobile for iPhone to delete a Timesheet that has not been submitted.

To delete a Timesheet:

1. Tap to show the list of open timesheets from the Dashboard.

2. Tap Edit and tap ⛔ next to the timesheet name OR swipe your finger right to left.

   Delete appears to the right of the timesheet name.

3. Tap Delete and the timesheet is removed from the Timesheets list. The name no longer appears.

   > ⓘ **Note:** To remove the Delete, tap the line but NOT the delete button.

Deleting Linked Timesheets

By default, you must manually create two timesheets for periods which include parts of two months. For example, if half of the week occurs in the end of January, and the second half of the week occurs in the beginning of February, you must create timesheets for the portion of the week which occurs in January and the portion which occurs in February.

For timesheets which include parts of two months (for example, part of the week is in the end of January, and part is in the beginning of February), you can delete either or both of the two timesheets created for the period. Using the above example, to completely delete the timesheets for the week starting at the end of January and finishing at the beginning of February, you would need to delete both timesheets for this period.

> ⓘ **Note:** If you delete a timesheet for one part of a linked period, and then use the calendar navigation to go to the time period which was covered by that timesheet, you will receive the following message:
>
> "Associated timesheet is no longer available. Would you want to create new one?"
>
> Tap **Yes** to create a timesheet for the missing period which uses the same time codes as the part of the period which still exists. Tap **No** to not create a new timesheet for the missing period.

Working with Approvals

You can use OpenAir Mobile for iPhone to approve or reject whole Timesheet or Expense reports or selectively approve/reject individual items.

⚠️ **Important:** The Approval feature is not available when the app is offline.

ℹ️ **Note:** You will only see the **To Approve** lines if you have the approval switches enabled in your account, see To provide users with permission to approve Timesheets / Expenses:.

To bulk approve Timesheets and Expense reports:

1. Tap the Timesheets or Expenses **To Approve** line from the Dashboard.
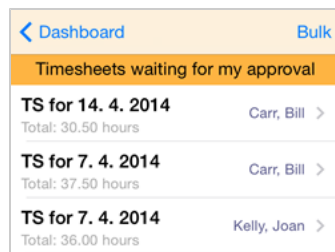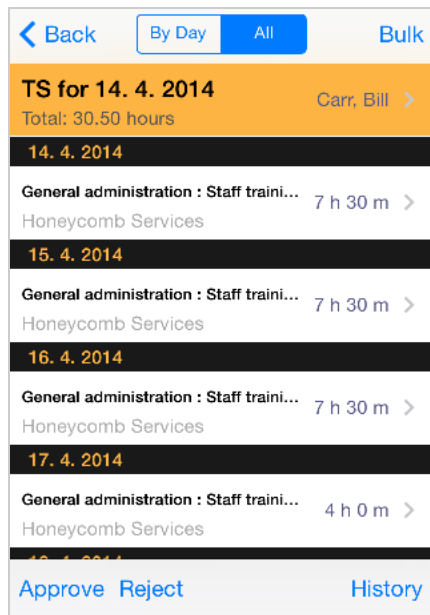

2. Tap Bulk at the top of the Timesheets or Expenses screen.

3. Multi select the required Timesheets and tap Approve or Reject at the bottom of the screen.
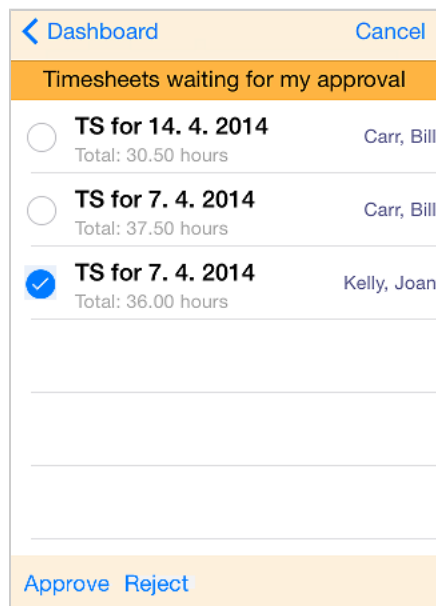

To approve/reject part of a Timesheet/Expense report

1. Tap the Timesheets or Expenses **To Approve** line from the Dashboard.

2. Tap the required Timesheet / Expense report from the list screen.

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> **Note:** You can approve or Reject the whole Timesheet / Expense report by tapping the respective button at the bottom of the screen.

3. Tap Bulk at the top of the screen.

4. Multi select the items to reject and then tap the Reject button at the bottom of the screen.
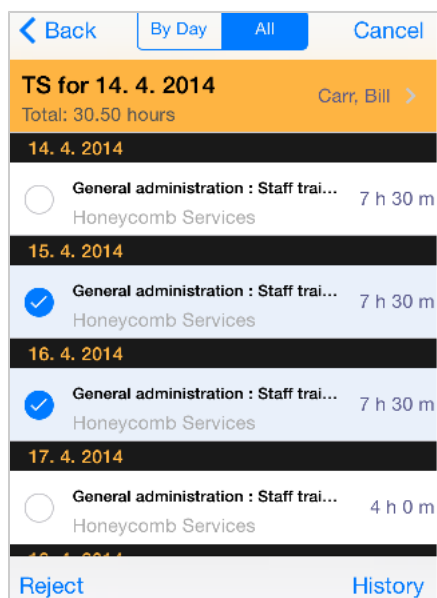
5. Wait for the screen to synchronize and then tap Approve at the bottom of the screen to approve the remaining items.

References

References contain Administration, Troubleshooting, and Frequently Asked Questions.

Administration

Administrators provide users with permission to exchange information between the OpenAir Mobile for iPhone app and an OpenAir account. Once you enable Exchange Access to OpenAir Mobile for iPhone for a user and that user downloads the app, the user can communicate with OpenAir Timesheets and Expenses through the iPhone app.

Form permissions and rules defined in a user's OpenAir account are downloaded and enforced on their iPhone.

> **ⓘ Note:** There are several limitations regarding the enforcement of permission rules in this version of iPhone. See the OpenAir Admin Guide for more details on form permissions.

- Only permission rules for the main entity form are supported.
- Form default values are not supported.

To provide users with exchange access:

1. Navigate to Administration > Users and select a User ID.
2. Click Access control > Exchange Access.
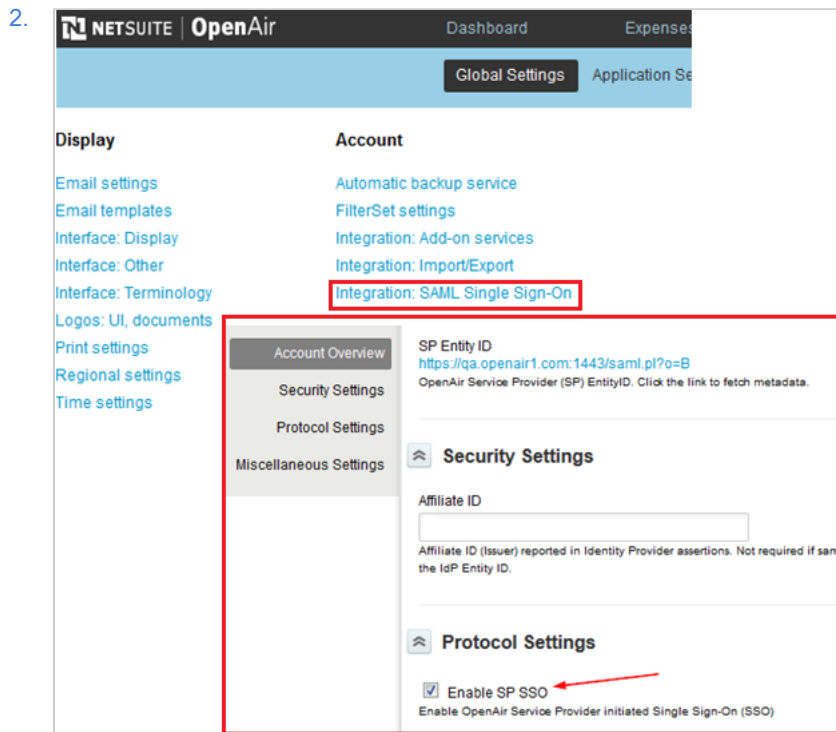
   The Exchange Access form appears.

3. Select OpenAir Mobile (iPhone), click Add selected items and Save.

To enable single-sign on:

1. Navigate to Administration > Integration: SAML Single Sign-On

> ⓘ **Note:** To enable this feature, please contact OpenAir Support and request the *Enable SAML integration* switch.

2.

You need to check the **Enable SP SSO** option to use single sign-on from your iPhone.

To provide users with permission to approve Timesheets / Expenses:

Separate switches need to be enabled for users to see the **To Approve** line on their Dashboard and access the approval functionality, see Working with Approvals.

1. To enable the user to approve Timesheets:

   Navigate to Administration > Global Settings > Users > [User] > Demographic > Timesheet Options.

   Check **Enable Approval on mobile for Timesheets** and Save.
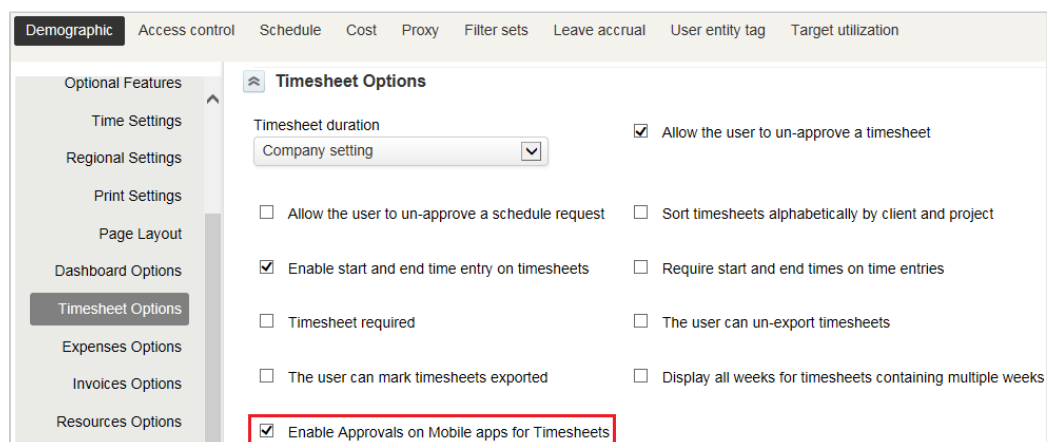
2. To enable the user to approve Expenses:

   Navigate to Administration > Global Settings > Users > [User] > Demographic > Expenses Options.

   Check **Enable Approval on mobile for Expenses** and Save.

Troubleshooting

If you are having trouble exchanging data using OpenAir Mobile for iPhone, ensure your administrator has enabled OpenAir Mobile (iPhone) access for your account. If problems persist or you would like additional information, please create a support case and submit it through your OpenAir account.

To create a support case:

1. Log in to your OpenAir account and select **Support** from the User Center menu.
2. Click on the **Go to SuiteAnswers** button.
3. From the **SuiteAnswers** site home page, click **Contact Support Online**.
4. Enter your question keywords and click **Search**.

   > ⓘ **Note:** If you do not have a question, i.e. you need a switch enabled, just click **Search**.

5. Very often the answer to your question will be displayed. If you still want to create a support case click **Continue to Create Case**.
6. Fill out the **Create Case** form and then click the **Submit**. You will receive an email confirmation with **Your OpenAir Customer Care #**.

   > ⓘ **Note:** An asterisk * appears after required fields.

Our Support staff and engineers will work with you to find a solution to your problem.

Frequently Asked Questions (FAQs)

How does my iPhone communicate with my OpenAir Account?

When your iPhone is online it communicates with your OpenAir account and exchanges information in both directions. You can also manually force the Synchronization.

- If you create or modify Expense reports and Timesheets in iPhone and Sync the accounts, open and submitted records are sent from iPhone to OpenAir and display in your OpenAir account.

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- If you create or modify Expense reports and Timesheets in OpenAir and Sync the accounts, open records download to your iPhone app.

- If you add receipts to an Expense report in OpenAir and save it, once you Sync the accounts, it appears in your iPhone app. When you add more receipts to the same Expense report on your iPhone and Sync the accounts, those receipts transfer to the same Expense report in your OpenAir account. All receipts are saved in both accounts.

- If you add time to a Timesheet in OpenAir and save it, once you Sync the accounts, it appears in your iPhone app. When you add time to the same Timesheet on your iPhone and Sync the accounts, the new time transfers to the same record in your OpenAir account. All time entries are saved in both accounts.

I got a conflict resolution warning. What does it mean?

There is a conflict between your OpenAir account and your iPhone account. Your conflict resolution setting guides the iPhone app in handling the discrepancy. See Conflict resolution and scroll down to the steps that address Conflict Resolution.

I had to change my password in my OpenAir account. Do I need to change it in OpenAir Mobile for iPhone?

Yes, the login credentials for the OpenAir app need to be the same as your OpenAir account. Access the Connection settings screen to make the required changes. See Change Login settings.

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