



# Mobile



5.1

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# Table of Contents

OpenAir Mobile Overview .....	1
OpenAir Mobile Security .....	2
OpenAir Mobile In-App Tips .....	3
Installing OpenAir Mobile .....	4
Configuring OpenAir Mobile .....	5
OpenAir Mobile Account Settings .....	6
Connecting OpenAir Mobile to Your OpenAir Account .....	7
Connecting OpenAir Mobile to Your OpenAir Account Using IdP-initiated Single Sign-On .....	9
Disconnecting OpenAir Mobile from your OpenAir Account .....	12
Time Entry .....	12
Theme .....	13
Rate OpenAir Mobile .....	14
Regional Settings .....	14
Synchronizing OpenAir Mobile with OpenAir .....	16
Navigating OpenAir Mobile .....	19
Working with the OpenAir Mobile Dashboard .....	19
Widget gallery .....	21
Pinned Timesheets, Expense Reports or Receipts .....	23
Working with the OpenAir Mobile Navigation Drawer .....	24
Quick Actions from Home Screen .....	26
Working with Drafts in OpenAir Mobile .....	28
Working with Timesheets in OpenAir Mobile .....	33
Timesheets Lists in OpenAir Mobile .....	33
Timesheets in OpenAir Mobile .....	38
Creating a Timesheet .....	47
Editing Timesheet Properties .....	52
Deleting Timesheets .....	53
Adding a Time Card to a Timesheet .....	54
Editing Time Card Properties .....	57
Deleting a Time Card .....	58
Adding or Editing Time Entries .....	58
Deleting Time Entries .....	67
Submitting Timesheets .....	68
Approving or Rejecting Timesheets .....	71
Working with Expenses in OpenAir Mobile .....	74
Expenses Lists in OpenAir Mobile .....	74
Expense Reports in OpenAir Mobile .....	78
Receipts in OpenAir Mobile .....	82
Expense Attachments in OpenAir Mobile .....	84
Creating an Expense Report .....	88
Editing Expense Report Properties .....	91
Deleting Expense Reports .....	91
Adding or Editing Receipts .....	92
Deleting Receipts .....	94
Working with Image Attachments on Expense Reports Receipts and Receipt drafts .....	95
Submitting Expense Reports .....	100
Approving or Rejecting Expense Reports .....	102
OpenAir Mobile References .....	107
OpenAir Mobile Icons .....	107
OpenAir Mobile Administration .....	113
OpenAir Mobile FAQ .....	117
OpenAir Mobile Troubleshooting .....	118

# OpenAir Mobile Overview

OpenAir Mobile lets you create, submit and keep track of your timesheets and expenses from your mobile device.

The app supports the following features:

- Timesheets:

- Create, copy and submit timesheets for a given period, edit or delete timesheets.
- Add time cards to your timesheets, edit or delete time cards.



**Note:** Time cards are subdivision of timesheets associated to a specific project or task. See [Timesheets in OpenAir Mobile](#) and [Time Cards](#).

- Add time entries to your time cards, edit or delete time entries.
- Approve timesheets or reject either entire timesheets or selected time entries.

See [Working with Timesheets in OpenAir Mobile](#).

- Expenses:

- Create, copy and submit expense reports for a given period, edit or delete expense reports.
- Review the expense policy associated to a project.
- Add receipts to your expense reports, edit or delete receipts.
- Add or delete image attachments to your expense reports and receipts. OpenAir Mobile compresses all image attachments to a 40% quality JPG with a maximum width/height of 2000 px to reduce the size of the file stored in OpenAir.
- Touch up image attachments to your expense reports and receipts.
- Approve expense reports or reject either entire expense reports or selected receipts.

See [Working with Expenses in OpenAir Mobile](#).

OpenAir Mobile utilizes standard touchscreen navigation on iPhone and Android devices. See [Navigating OpenAir Mobile](#).

The app is available as a free download in the following versions:


- OpenAir Mobile for **Android** — [Download from Google Play](#) — Requires a device running Android 7.0 or later.
- OpenAir Mobile for **iPhone** — [Download from the App Store](#) — Requires iPhone 6S/6S Plus/SE or later running iOS 14 or later.

Before you can use OpenAir Mobile, you must:


- Obtain access. Account administrators control who can exchange information between the OpenAir Mobile app and your company's OpenAir account. See [OpenAir Mobile Administration](#).
- Install the app on your mobile device and authorize the app to access your company's OpenAir data by entering your OpenAir sign-in details. See [Installing OpenAir Mobile](#) and [Configuring OpenAir Mobile](#).
- Let the app download the necessary data from your company's OpenAir account and store it locally on your device. See [Synchronizing OpenAir Mobile with OpenAir](#).

After OpenAir Mobile is installed and configured, your timesheets and expenses data is updated automatically in real-time when you are using the app online. For example, you can create a new timesheet in OpenAir Mobile when on the move, then complete and submit it later using the web application on your computer when back in the office. Your timesheet then follows the normal approval

process in OpenAir. Approvers can review your timesheets using either the mobile app or the web application, and you can track the status of your submitted timesheets on the app dashboard at any time.

 **Note:** Real-time data synchronization requires an active internet connection on your device (WiFi or cellular data).

- You can use OpenAir Mobile for **iPhone** offline when working with Timesheets. The synchronization runs automatically in the background every hour when your iPhone is connected to the internet. If your iPhone is offline when the next automatic synchronization is due, the synchronization will start when you are connected to the internet again. You can also trigger the synchronization manually when you are connected at any time to the internet.
- OpenAir Mobile for **Android** does not support offline use when working with expenses.
- OpenAir Mobile for **iPhone** does not support offline use when working with Expenses.

 **Important:** To use OpenAir Mobile to work with timesheets and expense reports, OpenAir Mobile services must be enabled for your account and you must have the relevant access privileges. For more information, contact your account administrator.

## OpenAir Mobile Security

Only authorized employees can access OpenAir data using OpenAir Mobile.

- Mobile services must be enabled for your company's OpenAir account.
- Account administrators control who can access OpenAir data using the app.

Account administrators control what data you can access and what you can do using OpenAir Mobile:

- Account administrators control whether you can access the Timesheets module, the Expenses module, or both modules using OpenAir Mobile.
- Account administrators control whether you can use the app to approve or reject timesheets and expense reports awaiting their approval.
- The same role permissions, form permissions and rules apply in both OpenAir and OpenAir Mobile.

OpenAir Mobile uses the industry standard OAuth 2.0 authorization framework to access your company's OpenAir data. Employees authorize OpenAir Mobile to access OpenAir data by entering their OpenAir sign-in details or Single Sign-on credentials.

- Employees can revoke the authorization for the "OpenAir Mobile OAuth2 global application" at any time. See
- Account administrators can use web services reports to audit and revoke authorizations. See

 [Security](#)

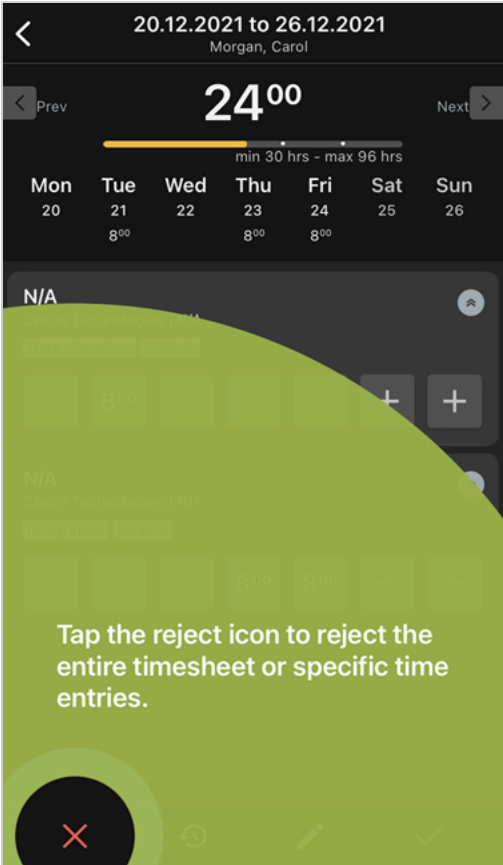
The IP Restriction feature in OpenAir may be used to ensure that OpenAir Mobile can only connect or stay connected with your company's OpenAir account if the your device is connected to your company's Wi-Fi network or VPN, for example.

OpenAir uses the industry standard Transport Layer Security (TLS) protocol to encrypt communication between the OpenAir server and the OpenAir Mobile app on your device, and to ensure the security of the data transferred.

OpenAir Mobile stores data locally on your device. Only the data relevant to the authenticated employees timesheets and expenses is stored. The app always encrypts your data with industry standard encryption.

## OpenAir Mobile In-App Tips

OpenAir Mobile uses in-app tips to highlight feature changes after you update the OpenAir Mobile app. For example, OpenAir Mobile 4.3 simplifies the way you reject selected time entries or the whole timesheets with both options available when you tap the reject icon. The app points out this feature change the first time you go to a timesheet to approve after updating to version 4.3.



# Installing OpenAir Mobile

OpenAir Mobile is primarily designed for use on iPhone and Android smartphones. Only the latest version of OpenAir Mobile available from the [App Store \(iPhone\)](#) or [Google Play Store \(Android\)](#) are supported. Please ensure you have the latest version of the app installed on your device.


To install or remove OpenAir Mobile, follow the usual procedure to install and manage other apps on your device. OpenAir Mobile 4 requires mobile browsers to have access to OpenAir.

## To install OpenAir Mobile:


1. Find the latest version of OpenAir Mobile in the [App Store \(iPhone\)](#) or [Google Play Store \(Android\)](#).
2. Tap **Get (iPhone)** or **Install (Android)**.
3. Tap the OpenAir Mobile icon on the home screen to launch the app.



**Note:** You can also sign in to the OpenAir web application and use one of the following options to find OpenAir Mobile on the App Store or Google Play Store.

- Click **Download Android app** or **Download iOS app** in the User Center menu. See  [User Guide](#).
- Go to Administration > Global Settings > Account > Integration: Add-on services and find the link to **Download with iTunes (iPhone)** or **Download with Google Play (Android)**.
- If your company's OpenAir account is configured to use IdP-initiated Single Sign-On as the sign-in method, you will be prompted to select which application you want to use after signing in to OpenAir. Select **OpenAir Mobile app**. You will be redirected to the app page in the App Store or Google Play Store. See [Connecting OpenAir Mobile to Your OpenAir Account Using IdP-initiated Single Sign-On](#).

## To remove OpenAir Mobile from an iPhone:

1. Touch and hold the OpenAir icon on the home screen. If your iPhone uses iOS 13 or later, a context menu appears. Tap **Edit Home Screen**. The app icons begin to jiggle.
2. Tap  on the OpenAir Mobile app icon.
3. Tap **Delete** when prompted to confirm whether you want to remove the app.

## To remove OpenAir Mobile from an Android device:

1. Go to Settings and tap **Application manager**. A list of installed apps appears.
2. Tap the OpenAir Mobile app icon, then tap **Uninstall**.
3. Tap **OK** when prompted to confirm whether you want to remove the app.




# Configuring OpenAir Mobile



The first time you launch the app, you must enter your OpenAir account and sign-in details to connect OpenAir Mobile to your company's OpenAir account. See [Connecting OpenAir Mobile to Your OpenAir Account](#).



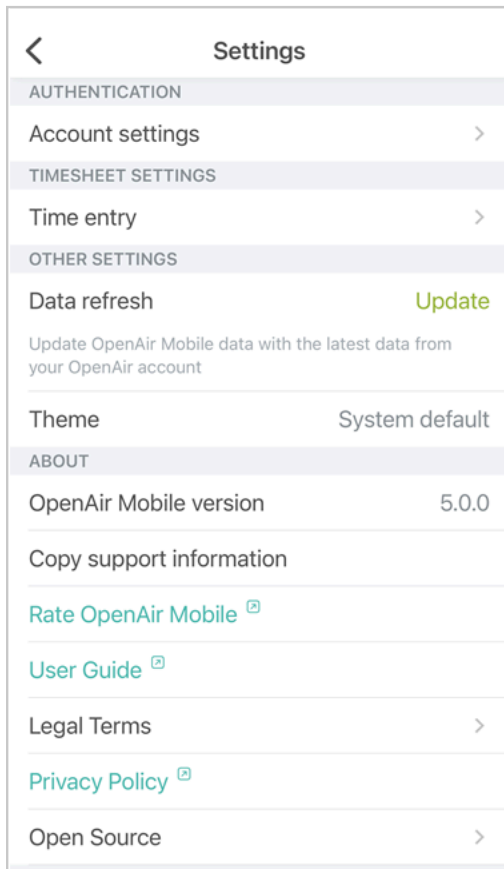
**Important:** To use OpenAir Mobile to work with timesheets and expense reports, OpenAir Mobile services must be enabled for your account and you must have the relevant access privileges. For more information, contact your account administrator. An internet connection is required to access data from your company's OpenAir account during initial setup or when changing configuration settings.

You can change the configuration settings at any time after the initial setup. To display the Settings screen, tap the menu icon  in the dashboard toolbar, then tap Settings in the navigation drawer. See [Navigating OpenAir Mobile](#).

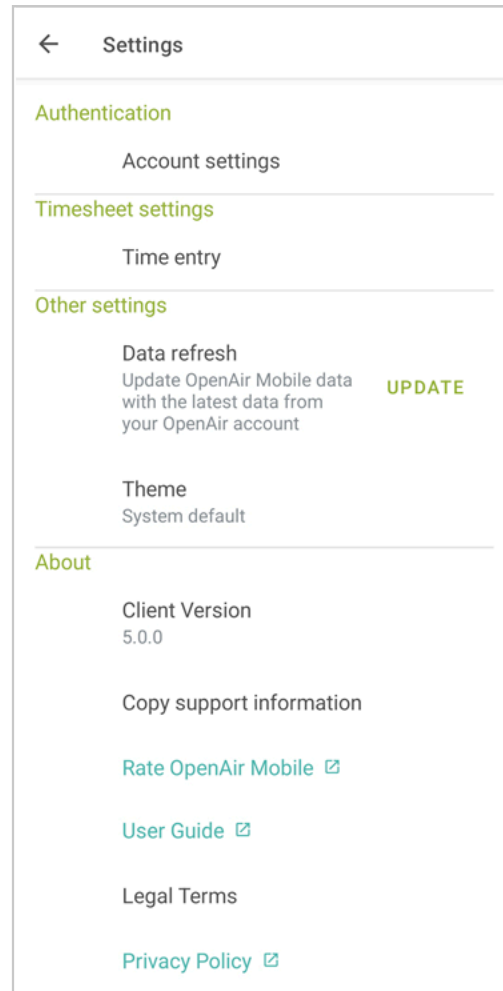
You can access the following configuration options and information resources from the Settings screen:

- Tap **Account settings** to change your sign-in details or switch the type of OpenAir account you are connecting to. See [Connecting OpenAir Mobile to Your OpenAir Account](#).
- Tap **Time Entry** to change your time entry preferences. See [Time Entry](#).
- **Data refresh** — Tap **Update** to repeat the initial synchronization. The synchronization erases the data stored on your device and download all the relevant data from your company's OpenAir account again. The dashboard appears after the synchronization is completed. See [Synchronizing OpenAir Mobile with OpenAir](#).
- Tap **Theme** to change between a light display theme or a dark display theme. See [Theme](#).
- **Client version (Android)** or **OpenAir Mobile version (iPhone)**— indicates which version of OpenAir Mobile is installed on your device.
- Tap **Copy support information** to copy the information you need to supply when you contact OpenAir Customer Support to report a problem with OpenAir Mobile. You can paste the information into a TXT file, and attach the document to your Support Case. See [Contacting OpenAir Customer Support](#).
- Tap **Rate OpenAir Mobile** to go to the App store or Google Play store and rate the latest version of OpenAir Mobile. See [Rate OpenAir Mobile](#).
- Tap **User guide** to view and download the documentation for OpenAir Mobile as a PDF book.
- Tap **Legal terms** to view the end user license agreement (EULA). Tap the back arrow icon  to return to the Settings screen after you have read it.
- Tap **Privacy policy** to view the Privacy legal notice on oracle.com website. The web page will open in your default mobile browser. Go back to OpenAir Mobile to continue working with OpenAir Mobile.
- Tap **Open Source** to view third-party software and licenses information. Tap the back arrow icon  to return to the Settings screen after you have read it.

OpenAir respects the regional settings set for the device. See [Regional Settings](#).



iPhone



Android


## OpenAir Mobile Account Settings

The Connection Settings configuration depends on the method you are using to access your company's OpenAir account:

- See [Connecting OpenAir Mobile to Your OpenAir Account](#) if you normally access OpenAir using the OpenAir sign-in page, even if you are then redirected to a single sign-on page.
- See [Connecting OpenAir Mobile to Your OpenAir Account Using IdP-initiated Single Sign-On](#) if you normally go to a single sign-on page first, then launch OpenAir from the single sign-on portal without needing to enter any credential details on the OpenAir sign-in page.

Refer to your internal documentation or contact your account administrator for specific instructions about the sign-in method and other account settings.

## Connecting OpenAir Mobile to Your OpenAir Account

 **Note:** Use the following procedure if you normally access OpenAir using the OpenAir sign-in page.


Otherwise, if you normally go to a single sign-on page first, then launch OpenAir from the single sign-on portal without needing to enter any credential details on the OpenAir sign-in page, see [Connecting OpenAir Mobile to Your OpenAir Account Using IdP-initiated Single Sign-On](#).

You can use the following steps to connect to your company's OpenAir account:

- If you launch OpenAir Mobile for the first time.
- If you want to connect OpenAir Mobile to a different OpenAir account or to switch user.

You need to sign in to OpenAir using your usual sign-in method and credentials to authorize OpenAir Mobile to connect and exchange information with OpenAir. You will only need to sign in again if:

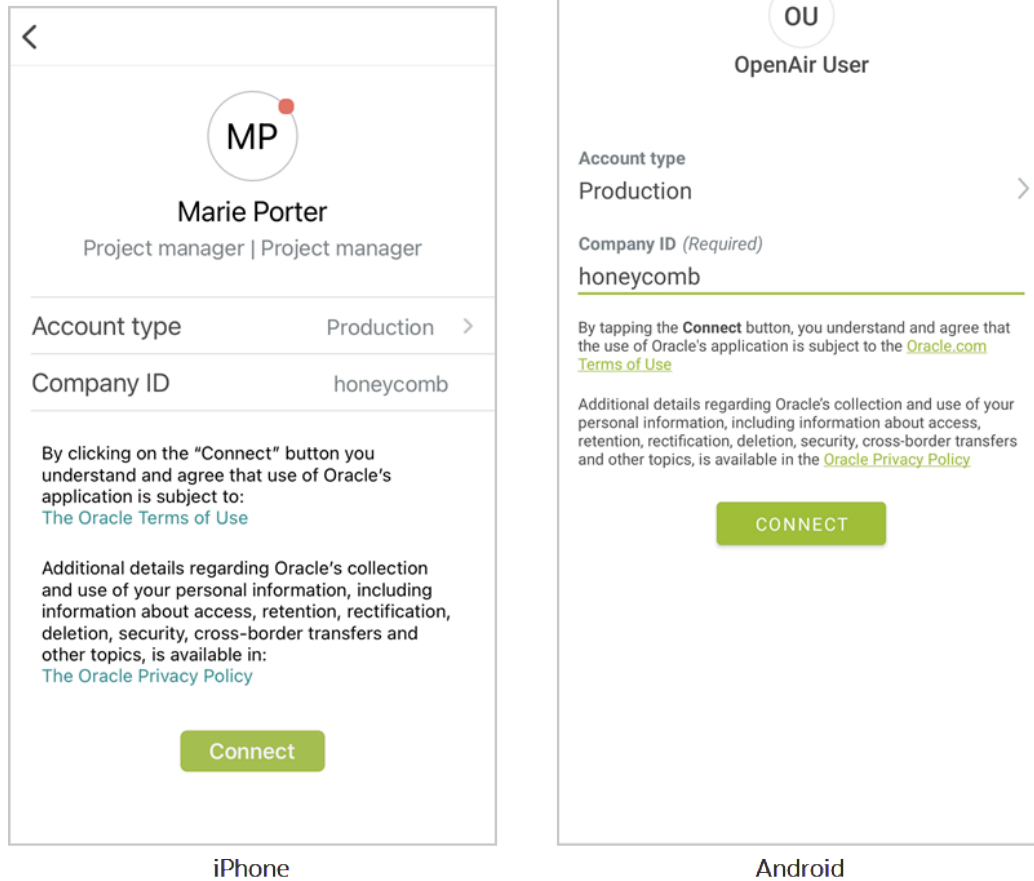
- You have not used OpenAir Mobile for a long time.
- After you disconnect OpenAir Mobile from OpenAir manually.
- After you or an account administrator revoke the authorization in OpenAir.
- If the IP Restriction feature is enabled in OpenAir, the IP address of your device is not authorized to access your company's OpenAir account. Your company may require that your device is connected to your company's physical network or VPN, for example.

 **Important:** On Android devices, set one of the following browsers as your default browser before you connect OpenAir Mobile to your OpenAir account. Note the additional requirements for each browser, where applicable.

- Samsung Internet Browser
- Google Chrome (normal browsing mode only — Incognito browsing is not supported).
- Firefox (make sure Firefox is not [set to open links in native apps](#))
- Edge ( normal browsing mode only - InPrivate browsing mode is not supported).

### To connect OpenAir Mobile to your company's OpenAir account:

1. Tap the OpenAir Mobile icon to launch the app.
  - If you are launching the app for the first time, the Legal Terms screen appears. Read the legal terms and then tap **Confirm**. The Account Settings screen appears.
  - Otherwise, the dashboard appears. To connect to a different OpenAir account or as a different user, disconnect OpenAir Mobile from OpenAir first. See [Disconnecting OpenAir Mobile from your OpenAir Account](#).



2. Select an account type and enter your company ID.
3. Tap **Connect**. A dialog appears.

**Note:** By tapping **Connect**, you understand and agree that the use of Oracle's application is subject to the [Oracle.com Terms of Use](#). Additional details regarding Oracle's collection and use of your personal information, including information about access, retention, rectification, deletion, security, cross-border transfers and other topics, is available in the [Oracle Privacy Policy](#).

4. Tap **Continue**. A version of the OpenAir sign-in page adapted for mobile appears.
5. Do one of the following:

- To sign in using your OpenAir password tap the **Password** tab, and enter your OpenAir **Company ID**, **User ID** and **Password** and tap **Log in**.

**Note:** Your company may restrict access to your OpenAir account depending on the IP address of your device. Your company may require that your device is connected to your company's Wi-Fi network or VPN, for example, for OpenAir Mobile to connect or stay connected with your OpenAir account.

- To sign in using service provider, initiated single sign-on tap the **Single Sign-On** tab, enter your **Company ID** and tap **Log in**. Your single sign-on page appears. Enter your SSO credentials.

**Note:** Tap the **Remember me** toggle to save the Company ID and the User ID on your device and fill them automatically the next time you want to sign in. You can use Touch ID and Face ID (**iPhone**) or Fingerprint and Face Authentication (**Android**) to sign in if enabled on your device, and supported by your mobile browser.

If this is the first time you launch OpenAir Mobile, the initial data synchronization starts automatically. Let the synchronization complete. See [Synchronizing OpenAir Mobile with OpenAir](#).

If you are connecting to a different OpenAir account or as a different user, a confirmation dialog appears. Tap **OK** to continue. OpenAir Mobile will erase the data stored on your device and download all the relevant data from your company's OpenAir account again.

If you made any changes since the last synchronization, another confirmation dialog appears. Tap **Yes** to discard changes and connect OpenAir Mobile using different connection settings. These changes will be lost. See [Synchronizing OpenAir Mobile with OpenAir](#).

## Connecting OpenAir Mobile to Your OpenAir Account Using IdP-initiated Single Sign-On

**Note:** Use the following procedure only if you normally go to a single sign-on page first, then launch OpenAir from the single sign-on portal without needing to enter any credential details on the OpenAir sign-in page.

Otherwise, if you normally access OpenAir using the OpenAir sign-in page, see [Connecting OpenAir Mobile to Your OpenAir Account](#).

You can use the following steps to connect to OpenAir Mobile if you launch OpenAir Mobile for the first time and if you want to connect OpenAir Mobile to a different OpenAir account or to switch user. You will only need to repeat these steps if you have not used OpenAir Mobile for a long time, or after you disconnect OpenAir Mobile from OpenAir manually, or after you or an account administrator revoke the authorization in OpenAir.

On Android devices, set one of the following browsers as your default browser before you connect OpenAir Mobile to your OpenAir account. Note the additional requirements for each browser, where applicable.

- Samsung Internet Browser
- Google Chrome (normal browsing mode only — Incognito browsing is not supported).
- Firefox (make sure Firefox is not [set to open links in native apps](#))
- Edge ( normal browsing mode only - InPrivate browsing mode is not supported).

### To connect OpenAir Mobile to your company's OpenAir account using IdP-initiated single sign-on:

1. Sign in and launch OpenAir Mobile from the OpenAir web application. See [Signing in to OpenAir Mobile with IdP-Initiated Single Sign-On](#).
2. Wait for OpenAir Mobile to launch.
3.
  - If this is the first time you launch OpenAir Mobile, the synchronization starts automatically after OpenAir Mobile launches. Let the synchronization complete. See [Synchronizing OpenAir Mobile with OpenAir](#).
  - If you are connecting to a different OpenAir account or as a different user, a confirmation dialog appears. Tap **OK** to continue. OpenAir Mobile will erase the data stored on your device and download all the relevant data from your company's OpenAir account again.

- If you made any changes since the last synchronization, another confirmation dialog appears. Tap Yes to discard changes and connect OpenAir Mobile using different connection settings. These changes will be lost. See [Synchronizing OpenAir Mobile with OpenAir](#).
- Otherwise, the dashboard appears. To connect to a different OpenAir account or as a different user, disconnect OpenAir Mobile from OpenAir first. See [Disconnecting OpenAir Mobile from your OpenAir Account](#).

**Note:** If OpenAir Mobile is not installed, or if the installed version does not support IdP-initiated single sign-on, follow the on-screen instructions to install the app from the App Store (**iPhone**) or Google Play Store (**Android**).

1. Tap **Go to Store and install OpenAir Mobile**. Then, tap **Open** to confirm you want to open OpenAir Mobile page in the App Store (**iPhone only**).
2. Follow the standard procedure to install and launch the app from the App Store (**iPhone**) or Google Play Store (**Android**). See [Installing OpenAir Mobile](#).
3. If the single sign-on session token expires before the installation finishes or before you open OpenAir Mobile, the synchronization will fail and the Connection Settings page will display. Go back to the OpenAir web application in your mobile browser — sign in again if necessary. Tap **Open OpenAir Mobile App** from the Tips Menu, then tap **OpenAir Mobile App**

**iPhone only** — If OpenAir Mobile 3.0 or later version is installed and the **Go to Store and install OpenAir Mobile** screen appears, OpenAir Mobile failed to launch. See [OpenAir Mobile Troubleshooting](#).

## Signing in to OpenAir Mobile with IdP-Initiated Single Sign-On

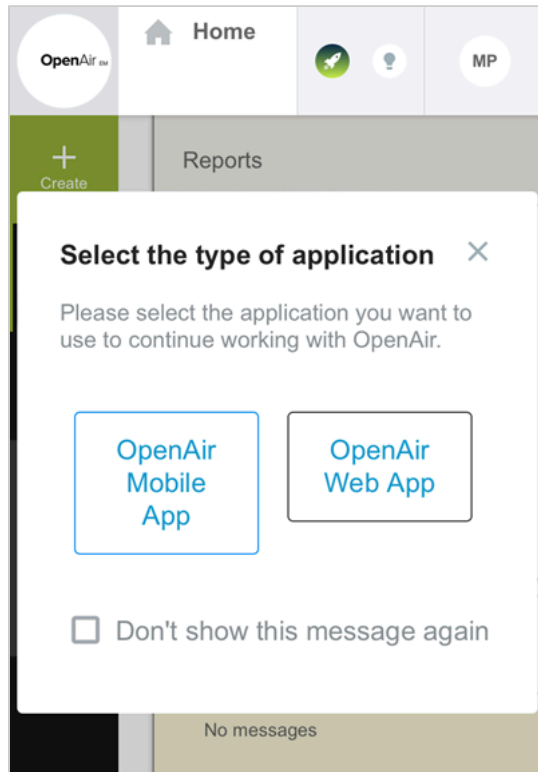
### To sign in to OpenAir Mobile with IdP-initiated single sign-on:

1. In your mobile browser, go to the identity provider single sign-on web page used in your company.
2. Sign in using your single sign-on credentials.
3. Tap the link for the OpenAir web application on the identity provider web page. The OpenAir web application opens in your mobile browser.

**Note:** Steps 1–3 are general guidelines. The exact procedure depends on the single sign-on solution implemented in your company environment. Refer to your internal documentation or contact your account administrator for more information.

4. The next step depends on your preference settings:
  - If it is the first time you access the OpenAir web application in your mobile browser, or if you have not set your preferred application, the following dialog appears. Tap **OpenAir Mobile App** to launch OpenAir Mobile.

✓ **Tip:** Check the **Don't show this message again** box before you tap **OpenAir Mobile App** to save OpenAir Mobile as your preferred application. OpenAir will remember your preference and redirect you automatically to OpenAir Mobile every time you start an OpenAir session using IdP-initiated single sign-on. You can change this preference at any time. See [Setting Your Preferred Application](#).



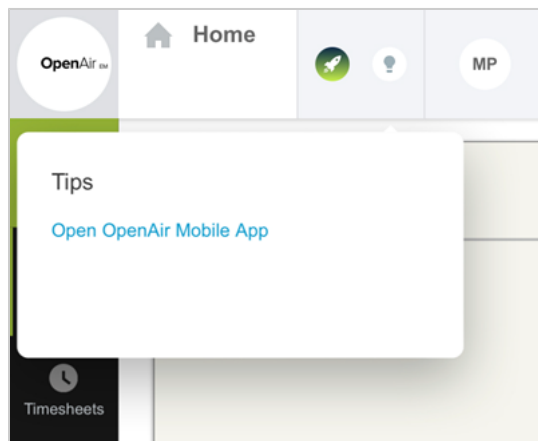
- If OpenAir Mobile is your preferred application, OpenAir Mobile launches automatically.
- If the OpenAir web application is your preferred application, tap **Open OpenAir Mobile App** from the tips menu in OpenAir to reset your preference and launch OpenAir Mobile. See [Setting Your Preferred Application](#).

## Setting Your Preferred Application

### To set your preferred application:

1. Sign in and launch OpenAir from your Identity Provider web page. See [Signing in to OpenAir Mobile with IdP-Initiated Single Sign-On](#).
2. If OpenAir Mobile is your preferred application, OpenAir Mobile launches automatically. Return to the OpenAir web application tab in your mobile browser. Otherwise, continue to step 3.
3. Tap the Tips Menu icon, then tap **Open OpenAir Mobile App**.

**Note:** This action resets your preference. If you sign out now, the dialog will appear the next time you sign in to OpenAir.




The application selection dialog appears.

4. Check the **Don't show me this message again** box to set a preferred application.
5. Tap **OpenAir Mobile App** or **OpenAir Web App**. If the **Don't show me this message again** box is checked, OpenAir remembers your preference. This preference determines whether OpenAir Mobile will be launched every time you start an OpenAir session using IdP-initiated single sign-on on your mobile device.

## Disconnecting OpenAir Mobile from your OpenAir Account

If you want to connect to a different OpenAir account or as a different user, you must disconnect OpenAir Mobile from your OpenAir account first.


### To disconnect OpenAir Mobile from your OpenAir Account:

1. Tap the menu icon  in the dashboard toolbar, then tap Settings in the navigation drawer and then tap Account Settings.
2. Tap **Disconnect**.

## Time Entry

OpenAir lets you set preferences for time entry, including the time entry method preference and, when using the start and end time method, the default start time and duration.

### To Set Time Entry Preferences in OpenAir:

1. Tap the menu icon  in the dashboard toolbar, then tap Settings in the navigation drawer.
2. Tap **Time Entry**.
3. Tap **Method** to select one of the following options:




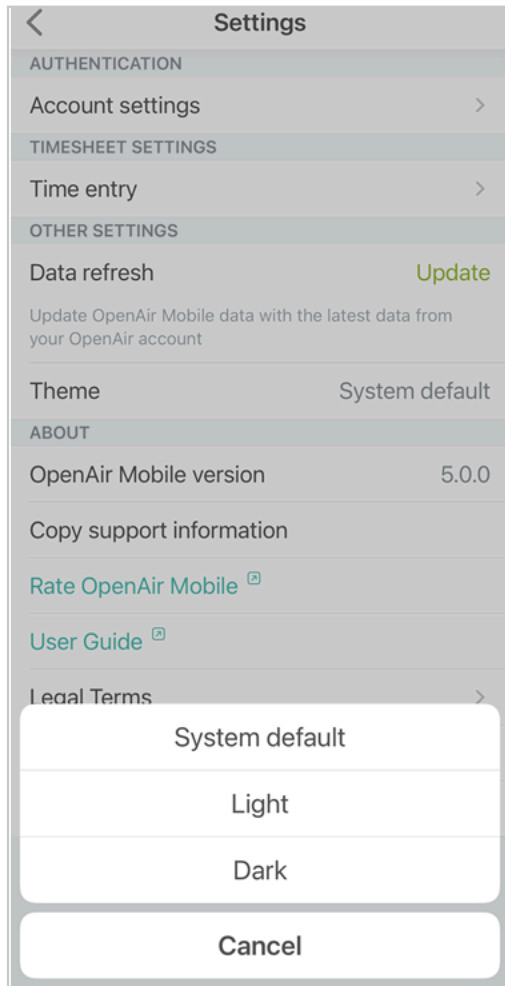
- **Always choose**— Choose the time entry method every time you add or edit a time entry.
  - **Remember last choice**—Choose a time entry method when you add a new time entry, and remember the choice when you edit the same time entry.
  - **Duration** — Enter a duration every time you add or edit a time entry. See [Using the Time Entry Form and Time Picker](#).
  - **Start time and End time** — Select a start time and end time every time you add or edit a time entry.
4. Tap **Default start time** and select the default start time when adding a time entry using the start time and end time method:
    - **Current time** — The start time is set to the current time by default.
    - **After latest time entry** — The start time is set to the end time of the latest time entry for that day, or to 7 a.m. if this is the first time entry for that day.
  5. Tap **Default duration** and set the default duration to be used when adding a new time entry using the start time and end time method. To do so, scroll to select the number of hours and scroll to select the number of minutes.

## Theme

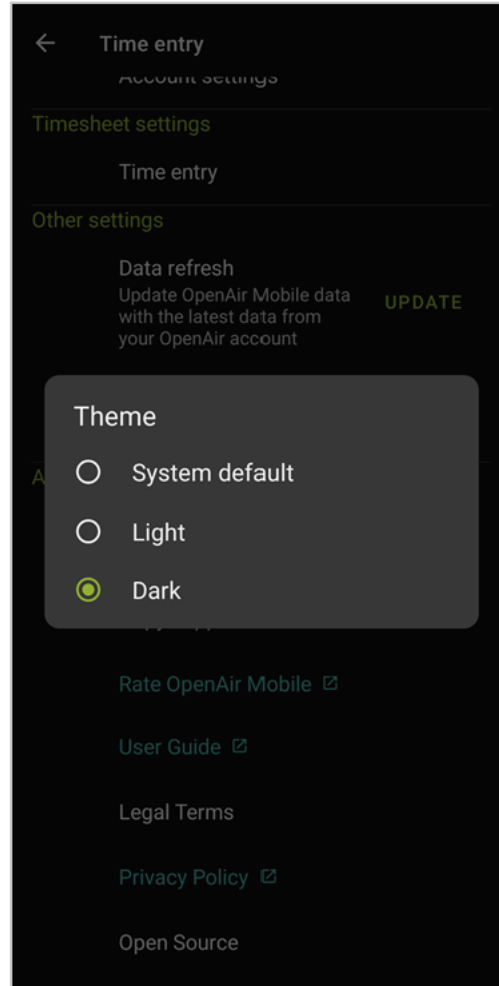
OpenAir lets you choose between the display theme selected in your device settings, a light display theme or a dark display theme. You can activate the dark theme to reduce eye strain and avoid disturbing others when working with timesheets and expenses in low-light settings.

### To Change the Theme in OpenAir:

1. Tap the menu icon  in the dashboard toolbar, then tap Settings in the navigation drawer.
2. Tap **Theme**.
3. Tap **System Default** to use the default theme of your device.
4. Tap **Light** to use the light theme.
5. Tap **Dark** to use the dark theme.



iPhone



Android

## Rate OpenAir Mobile

We value your feedback and use the information you provide to improve OpenAir Mobile. OpenAir Mobile will ask you to rate the app and give us your feedback. The OpenAir Mobile in-app rating form will appear after you have used the app for some time and only a limited number of times.

To go to the App store or Google Play store, and rate the latest version of OpenAir Mobile at any time, go to the Settings screen and tap **Rate OpenAir Mobile**.

On **iPhone**, you can enable or disable in-app rating forms on your device. To do so, open the Settings app, tap **iTunes & App Store** and tap the **In-App Rating & Reviews** toggle.

## Regional Settings

OpenAir Mobile respects the regional settings set for your device for date, time and number formats. You should use the same regional settings on your mobile device as in OpenAir.

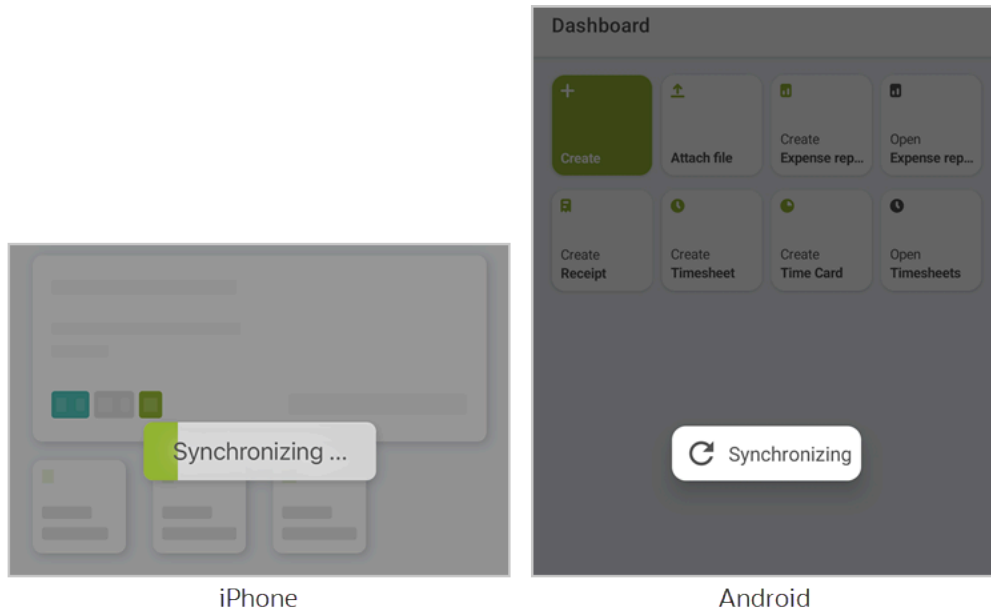
To change the regional settings:

- On iPhone, go to Settings > General > Language & region.
- On Android, go to Settings > General, management > Date & Time.
- In OpenAir, click Personal Settings from the user menu, and scroll down to Regional Settings.

# Synchronizing OpenAir Mobile with OpenAir

OpenAir Mobile downloads the relevant data from your company's OpenAir account and stores it securely on your device during the initial synchronization when you set up OpenAir Mobile or change the connection settings.

The initial synchronization downloads all the information relevant to your timesheets and expenses, including customers, projects and tasks data. When the initial synchronization is running, OpenAir Mobile shows a loading progress wheel in the center of the screen. The synchronization progress status appears.



**Note:** The initial synchronization can take a few minutes, depending on the amount of data to download — make sure you let the synchronization complete.

After OpenAir Mobile is installed and configured, your data is updated automatically if you are using the app online. You can work on your open timesheets and expense reports and follow the approval status of your submitted items in OpenAir Mobile or in the OpenAir web application. Any changes you make using the mobile app are sent to the OpenAir server and conversely any changes on the OpenAir server are sent to your mobile device.

Your OpenAir Mobile data is updated automatically with the latest information from the OpenAir server when you switch back to OpenAir Mobile after working with another app for more than 5 minutes, or when you connect the OpenAir Mobile app with your company's OpenAir account and enter your OpenAir sign-in details again.

If you are using OpenAir Mobile on an **Android device** or working with expenses using OpenAir Mobile on an **iPhone**:

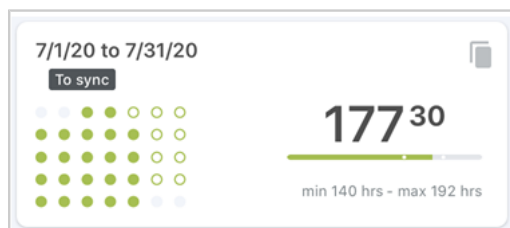
- The synchronization happens in real time when you make changes in OpenAir Mobile. When you save changes in OpenAir Mobile, the information is updated automatically on the OpenAir server.
- You can trigger the synchronization manually to get the latest data from the OpenAir server at any time — see [Triggering the Synchronization Manually](#).

**Note:** Your company may restrict access to your company's OpenAir account depending on the IP address of your device. Your company may require that your device is connected to your company's Wi-Fi network or VPN, for example, for OpenAir Mobile to connect or stay connected with your company's OpenAir account.

On both **iPhone** and **Android** devices:

- OpenAir Mobile is updated with the latest information from the OpenAir server when you launch the app.
- If the app was inactive or the phone offline the synchronization runs automatically when your phone is connected to the internet again, and you bring the app to the foreground.
- When you save changes in OpenAir Mobile, OpenAir Mobile is updated with the latest expenses or timesheets information from the OpenAir server, depending on the type of record you edited.
- You can continue working with timesheets using OpenAir Mobile when your device is offline. OpenAir Mobile stores the changes you make to timesheets on your device, and runs the synchronization when you are back online.

On the lists, timesheets changed in OpenAir Mobile since the last synchronization show a "To sync" label.



**Note:** If you update the same fields on the same record in both OpenAir Mobile, when offline, and the OpenAir web application, the information entered in OpenAir Mobile (and stored on your device) will overwrite the information entered in the OpenAir web application (and stored on the OpenAir server) the next time the synchronization runs.


- You can make changes to expense reports and receipts using OpenAir Mobile only if your device is connected to the internet.

## Data refresh

You can use the Refresh data option to repeat the initial synchronization. You should use this option to include any changes from your company's OpenAir account, items such as customers, projects, and tasks are missing from lists.

### To Refresh data:



1. Go to the Settings screen. See [Configuring OpenAir Mobile](#).
2. Tap **Update**.  
A confirmation dialog appears.
3. Tap **Update**.
4. The synchronization begins automatically.


 **Note:** The **Update** link appears in gray color when the synchronization is running or when the app is offline. It appears in green color again after the synchronization completes.

## Triggering the Synchronization Manually

You can launch the synchronization at any time to update OpenAir Mobile with the latest data from timesheets, expenses, customers, projects, tasks and other items from the OpenAir server and send any timesheets or expense reports you modified using OpenAir Mobile to the OpenAir server.


### To trigger the synchronization manually

1. In OpenAir Mobile, tap the menu icon  in the toolbar.  
The navigation drawer appears.
2. Tap the Synchronize icon  at the top of the navigation drawer.  
The synchronization progress status appears.

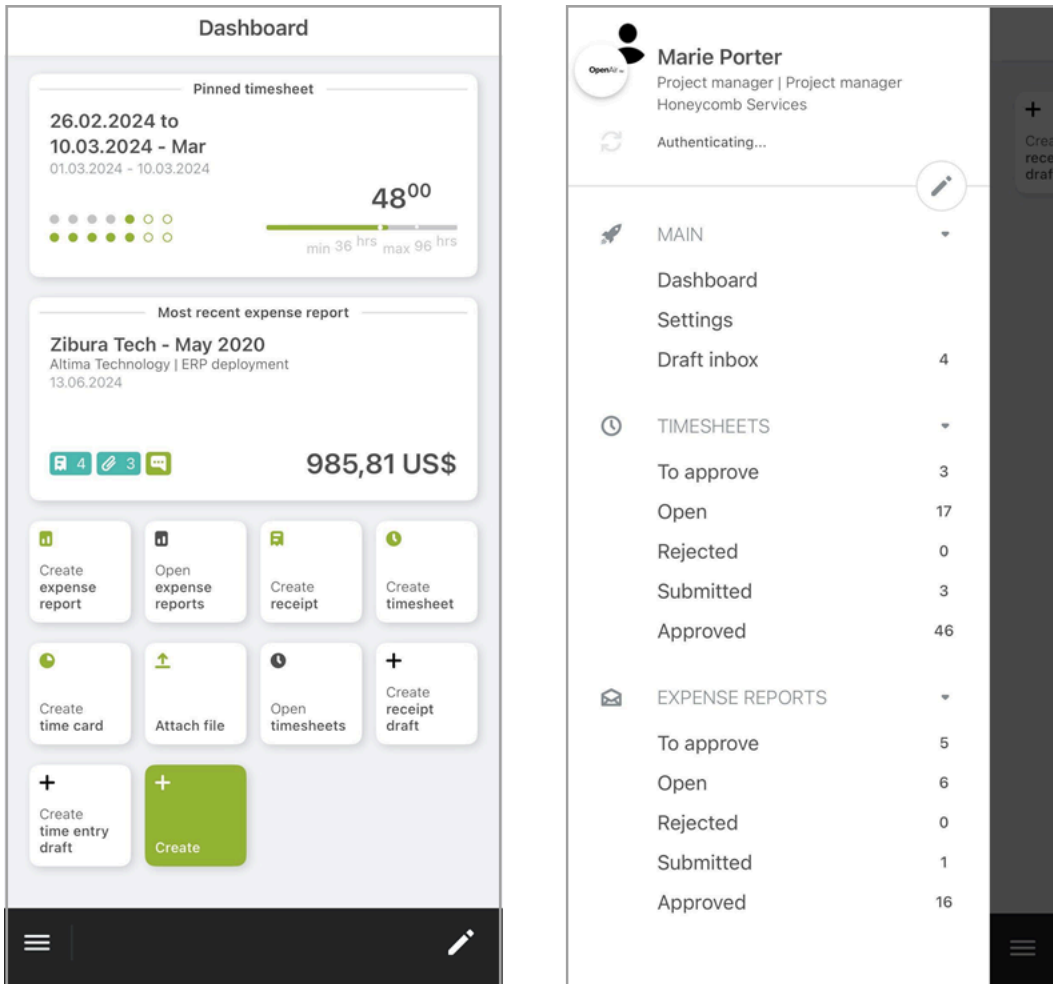
 **Note:** The synchronization runs in the background. You can continue working with timesheets and expenses while the synchronization is running.

# Navigating OpenAir Mobile

If OpenAir Mobile is installed and connected to your OpenAir account, the first screen you see when you launch the application is the dashboard. You can create your own dashboard with handpicked widgets from the widget gallery. Widgets include shortcuts to lists, summaries of pinned and most recent timesheets or expense reports, create and file upload actions. See [Working with the OpenAir Mobile Dashboard](#).

You can tap the menu icon  to view the navigation drawer at any time when using OpenAir Mobile. You can use the navigation drawer to go to your dashboard, access the draft inbox, the app Settings screen or any lists you have access to, and to get a quick overview of the number of timesheets and expense reports by status. See [Working with the OpenAir Mobile Navigation Drawer](#).

You can also access some actions from the home screen on your device. See [Quick Actions from Home Screen](#).



## Working with the OpenAir Mobile Dashboard

By default the dashboard shows the following widgets:

- Most recent timesheet
- Most recent expense report
- Create receipt
- Create expense report
- Create timesheet

You can personalize your dashboard with handpicked widgets from the widget gallery. Widgets include shortcuts to lists, summaries of most recent timesheets or expense reports, create and file upload actions.





For a full list of available widgets, see [Widget gallery](#).

You can also pin open or rejected timesheets, expense reports and receipts to your dashboard. See [Pinned Timesheets](#), [Expense Reports](#) or [Receipts](#).

## Personalizing your Dashboard

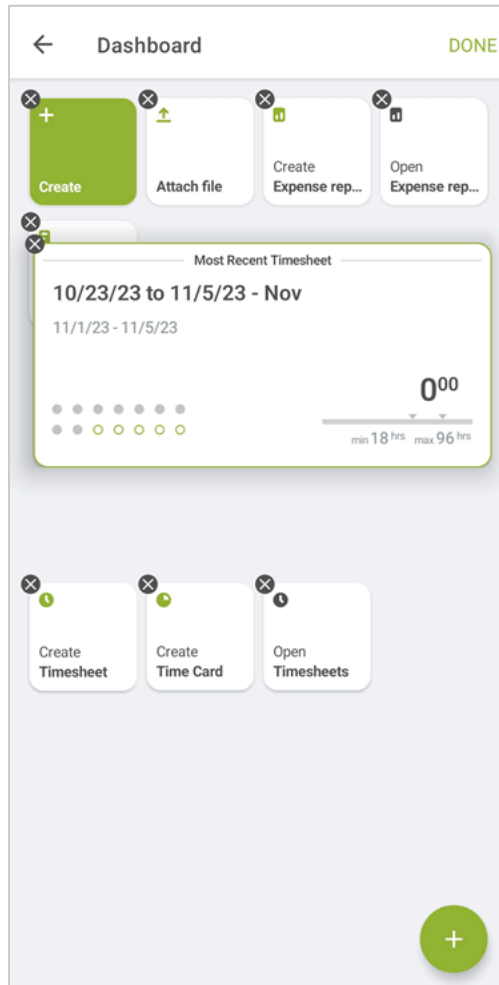
You can personalize your dashboard by adding widgets available from the widget gallery, or by moving or removing widgets or pinned items.

### To add widgets to the OpenAir Mobile dashboard:

1. On the dashboard, tap the edit icon  in the toolbar.
2. To add widgets to your dashboard:
  - a. Tap the  (**Android**) or  (**iPhone**) to go to the widget gallery screen.  
The widget gallery appears.
  - b. Tap each widget you want to add.  
The added widgets disappear from the gallery.
  - c. Tap **Done**.  
The dashboard shows the widgets you added.
3. To remove a widget, tap the cross mark icon  next to each widget you want to remove.
4. To move a widget:
  - a. Hold and drag the widget to a new position.  
The dashboard shows a preview of the new position as you drag.
  - b. Release the widget when the preview shows the correct new position.
  - c. Click **Done**.



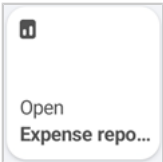
**Note:** The changes you make are validated automatically if you stop interacting with the app for a few seconds.

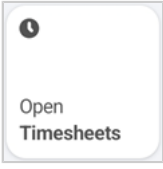
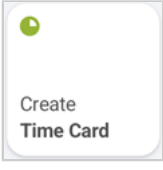
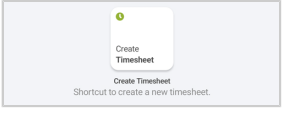

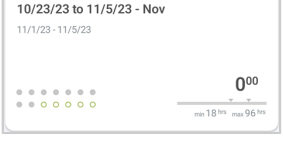

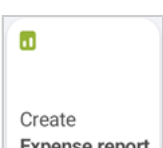
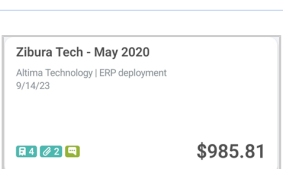





## Widget gallery

The following table describes the widgets available from the widget gallery.

You can also pin open or rejected timesheets, expense reports and receipts to your dashboard. See [Pinned Timesheets](#), [Expense Reports](#) or [Receipts](#).

 <p>Open Expense repo...</p>	<p><b>Open Expense reports</b> widget — This widget adds a shortcut to the Open expense reports list on your dashboard. See <a href="#">Expenses Lists in OpenAir Mobile</a>.</p>
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 <p>Open Timesheets</p>	<p><b>Open Timesheets</b> widget — This widget adds a shortcut to the Open Timesheets on your dashboard. See <a href="#">Timesheets Lists in OpenAir Mobile</a>.</p>
 <p>Create Time Card</p>	<p><b>Create Time Card</b> widget — This widget lets you add a new time card to an existing timesheet from your dashboard. See <a href="#">Adding a New Time Card</a>.</p>
 <p>Create Timesheet Shortcut to create a new timesheet.</p>	<p><b>Create Timesheet</b> widget — This widget adds a shortcut to the New timesheet form and lets you add a new timesheet from your dashboard. See <a href="#">Creating a New Timesheet From Blank</a>.</p>
 <p>Create time entry draft Shortcut to create a new time entry draft.</p>	<p><b>Create time entry draft</b> widget — This widget lets you add a new time entry draft for a timesheet from your dashboard. See <a href="#">Working with Drafts in OpenAir Mobile</a>.</p>
 <p>10/23/23 to 11/5/23 - Nov 11/1/23 - 11/5/23 0<sup>00</sup> min 18<sup>00</sup> max 96<sup>00</sup></p>	<p><b>Most Recent Timesheet</b> widget — This widget shows a summary of the last open timesheet you created on your dashboard. Tap the summary to go to this timesheet. See <a href="#">Timesheets in OpenAir Mobile</a>.</p>
 <p>Create Receipt</p>	<p><b>Create Receipt</b> widget — This widget lets you add a new receipt form to an existing expense report from your dashboard. See <a href="#">Adding or Editing Receipts</a>.</p>
 <p>Create Expense report</p>	<p><b>Create Expense Report</b> widget — This widget adds a shortcut to New expense report form and lets you add a new expense report from your dashboard. See <a href="#">Creating an Expense Report From Blank</a>.</p>
 <p>Zibura Tech - May 2020 Altima Technology   ERP deployment 9/14/23 \$985.81</p>	<p><b>Most Recent Expense Report</b> widget — This widget shows a summary of the last open expense report you created on your dashboard. Tap the summary to go to this expense report. See <a href="#">Expense Reports in OpenAir Mobile</a>.</p>
 <p>Create receipt draft Shortcut to create a new receipt draft.</p>	<p><b>Create receipt draft</b> widget — This widget lets you add a new receipt draft for an expense report from your dashboard. See <a href="#">Working with Drafts in OpenAir Mobile</a>.</p>

	<p><b>Attach file</b> widget — This widget lets you take a photo, select photos or select files and attach them to a new or existing receipt, draft receipt or expense report from your dashboard. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>.</p>
	<p><b>Create</b> widget — This widget lets you add a new timesheet, time card, expense report or receipt from your dashboard.</p> <p>Tap <b>Create</b> then,</p> <ul style="list-style-type: none"> <li>■ Tap <b>Timesheet</b>. The new timesheet form appears. See <a href="#">Creating a New Timesheet From Blank</a>.</li> <li>■ Tap <b>Time Card</b>, then select the timesheet you want to add the new time card to. The new time card form appears. See <a href="#">Adding a New Time Card</a>.</li> <li>■ Tap <b>Time entry draft</b>. The new time entry draft form appears. See <a href="#">Working with Drafts in OpenAir Mobile</a>.</li> <li>■ Tap <b>Expense report</b>. The new expense report form appears. See <a href="#">Creating an Expense Report From Blank</a>.</li> <li>■ Tap <b>Receipt</b>, then select the expense report you want to add the new receipt to. See <a href="#">Adding or Editing Receipts</a>.</li> <li>■ Tap <b>Receipt draft</b>. The new receipt draft form appears. See <a href="#">Working with Drafts in OpenAir Mobile</a>.</li> </ul>

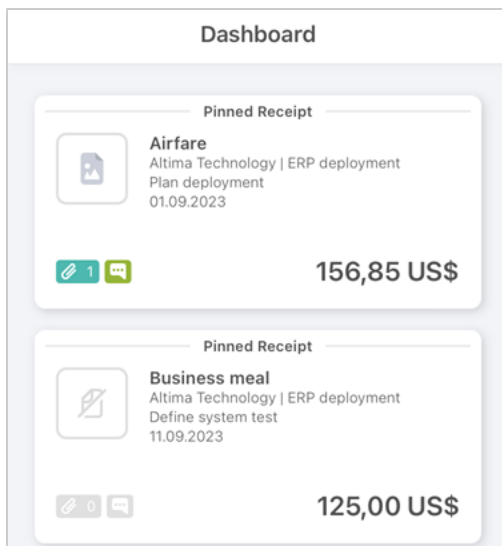
## Pinned Timesheets, Expense Reports or Receipts

You can pin or unpin open or rejected timesheets, expense reports or receipts to your dashboard from the respective lists, or expense report.

You can add several pinned items to your dashboard. See [Pinning an Item to your Dashboard](#).

A pinned item shows a summary of the item. Click the pinned item to go to that item from your dashboard.


Pinned items are removed automatically from the dashboard when you submit the timesheet or expense report. You can also unpin the item manually. [Unpinning an Item from your Dashboard](#).



## Pinning an Item to your Dashboard

You can pin open or rejected items to your dashboard from the list or from the expense report.

### To pin an item to your dashboard:

1. Go to one of the following screens:
  - Draft inbox.
  - Open or rejected timesheet list.
  - Open or rejected expense report list.
  - Open or rejected expense report.
2. Locate the timesheet, expense report, receipt or draft receipt and time entry draft you want to pin to the dashboard, tap the more options icon .
 

A context menu appears.
3. Tap **Pin to dashboard**

A toast message confirms that the item was pinned to your dashboard.



## Unpinning an Item from your Dashboard

You can unpin items from your dashboard. To do so, do one of the following:

- Follow the steps you used to pin the item to the dashboard. If the item is already pinned to the dashboard, the context menu shows an **Unpin from dashboard** option instead of **Pin to dashboard**. See [Pinning an Item to your Dashboard](#).
- Follow the steps to personalize your dashboard and remove the pinned item. See [Personalizing your Dashboard](#).

## Working with the OpenAir Mobile Navigation Drawer


You can use the navigation drawer to view the list of timesheets or expense reports by status, access the app configuration settings, draft inbox or run the synchronization manually.

<b>1</b>	<p><b>Header</b> — The header in the navigation drawer shows:</p> <ul style="list-style-type: none"> <li>■ The name of the person signed in to OpenAir Mobile, their role and avatar. Tap the <b>Name</b>, to go to the account settings page and change your sign-in details or switch the type of account you are connecting to. See <a href="#">Connecting OpenAir Mobile to Your OpenAir Account</a></li> <li>■ The last synchronization date and time. Tap the synchronization icon  to trigger the synchronization manually and to get the latest data from the OpenAir server at any time. See <a href="#">Triggering the Synchronization Manually</a>.</li> </ul>
<b>2</b>	<p><b>Favorites</b> — The favorites in the navigation drawer show a list of your favorite list items to access faster. Tap the edit icon  to add favorite list items. See <a href="#">Adding Favorites to the Navigation Drawer</a>.</p>
<b>3</b>	<p><b>Main</b>— The main in the navigation drawer shows:</p>

	<ul style="list-style-type: none"> <li>■ The <b>Dashboard</b> . See <a href="#">Working with the OpenAir Mobile Dashboard</a>.</li> <li>■ The <b>Settings</b>. See <a href="#">OpenAir Mobile Account Settings</a>.</li> <li>■ The <b>Draft inbox</b>. See <a href="#">Working with Drafts in OpenAir Mobile</a>.</li> </ul>
4	<b>Timesheets</b> — The timesheets in the navigation drawer shows the timesheet list item corresponding to the item status.
5	<b>Expense reports</b> — The expense reports in the navigation drawer shows the expense report list item corresponding to the item status.


In the navigation drawer to view the list item, tap the row corresponding to the item status:

- Tap the **To Approve** line to view a list of timesheets or expense reports submitted by others and awaiting your approval.

 **Note:** To see the **To Approve** line, go to your personal settings in the OpenAir web application and check the **Enable Approvals on Mobile apps for Timesheets** and **Enable Approvals on Mobile apps for Expenses** boxes.

You must have the relevant user privileges to be able to approve timesheets and expense reports submitted by other employees.

- Tap the **Open** line to view a list of your open timesheets or expense reports.
- Tap the **Submitted** line to view a list of your submitted timesheets or expense reports.
- Tap the **Rejected** line to view a list of your submitted timesheets or expense reports which have been rejected by the approver(s).
- Tap the **Approved** line to view a list of your submitted timesheets or expense reports which have been approved by the approver(s).
- To work with your existing timesheets or expense reports, go to the relevant lists. From there you can perform all the actions available according to your role permissions and to the item status — see [Working with Timesheets in OpenAir Mobile](#) and [Working with Expenses in OpenAir Mobile](#).





 **Note:** The synchronization runs automatically in the background every 4 hours and updates your data. You can run the synchronization manually to update your timesheets and expense reports data in between automatic synchronization runs.

Progress status information appears in the bottom left corner when information is exchanged with the OpenAir server, during authentication and synchronization.

## Adding Favorites to the Navigation Drawer

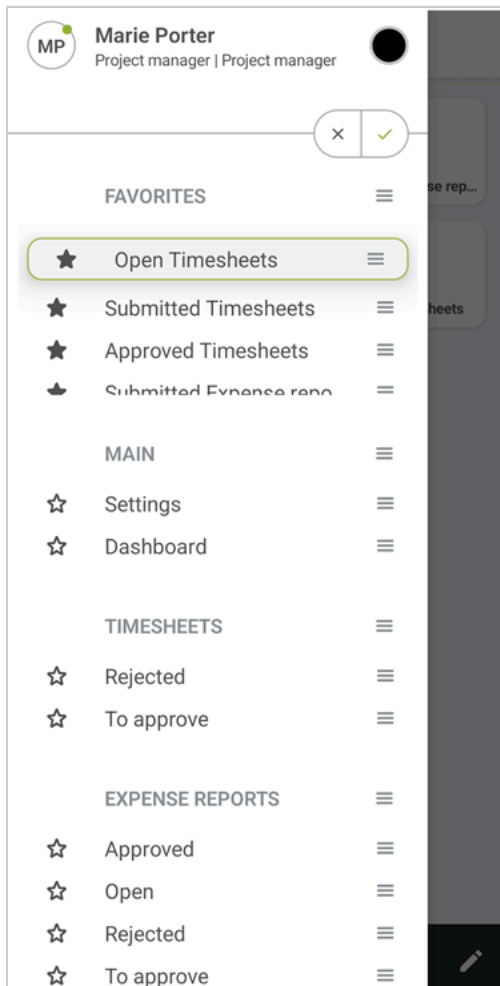
You can access faster lists in your navigation drawer menu by adding favorite list items.

### To add favorites to the navigation drawer:

1. To view the navigation drawer, tap the menu icon  from any lists or from the dashboard.
2. In the navigation drawer, tap the edit icon .
3. To add a menu item to your favorites, tap the outline star  next to the menu item.
4. To remove a menu item from your favorites, tap the solid star  next to the menu item.
5. To move a menu item within a section:
  - a. Hold and drag the menu item to a new position.

The navigation drawer shows a preview of the new position as you drag.

- b. Release the menu item when the preview shows the correct new position.
6. Tap the check mark icon ✓ to save the changes or the cross mark icon ✕ to discard the changes.



## Quick Actions from Home Screen

You can access the Create new timesheet or Create new expense report actions from the home screen of your **iPhone** and **Android** device:

### To create a new timesheet or a new expense report from the home screen of your device:

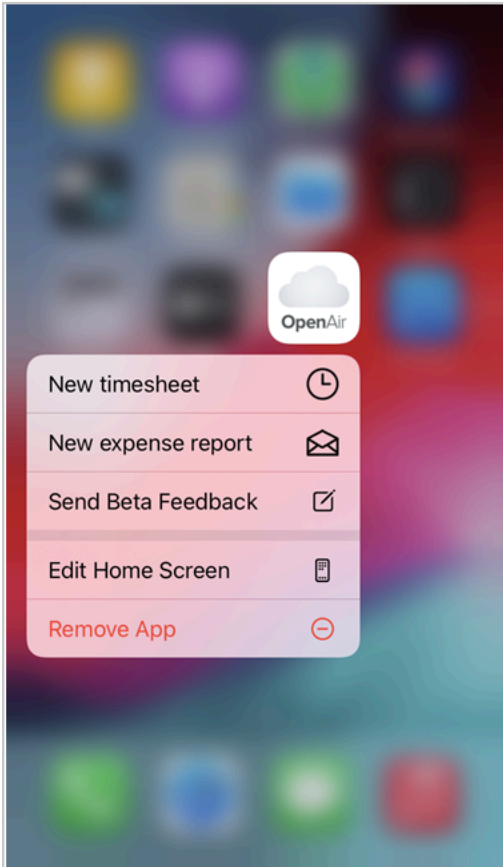
1. Hold the icon for the OpenAir Mobile app on your device.

A context menu appears.

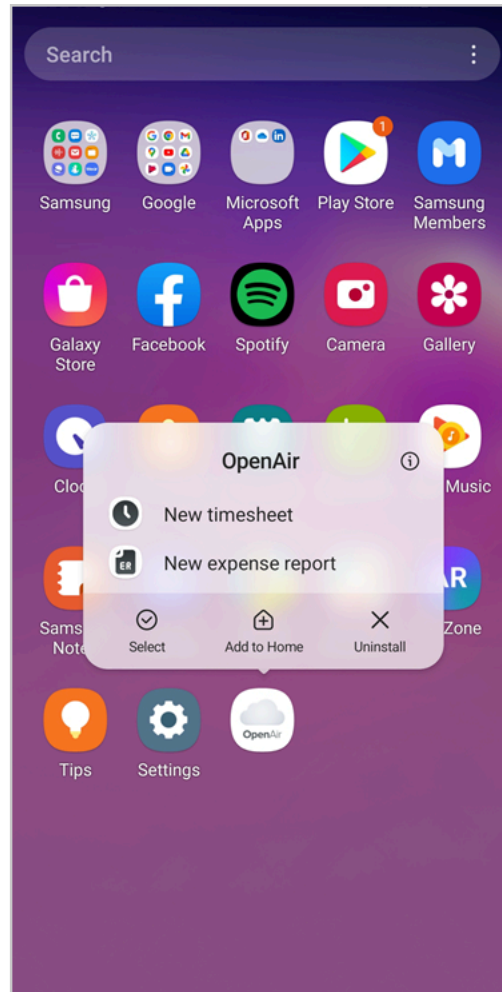
2. Tap **New timesheet** or **New expense report**.

The app opens and takes you straight to the new timesheet and the new expense report form. See [Creating a New Timesheet From Blank](#) and [Creating an Expense Report From Blank](#).

**Note:** If the app is no longer connected to OpenAir, you will need to sign in before the New timesheet or New expense report form appears.



iPhone



Android

# Working with Drafts in OpenAir Mobile

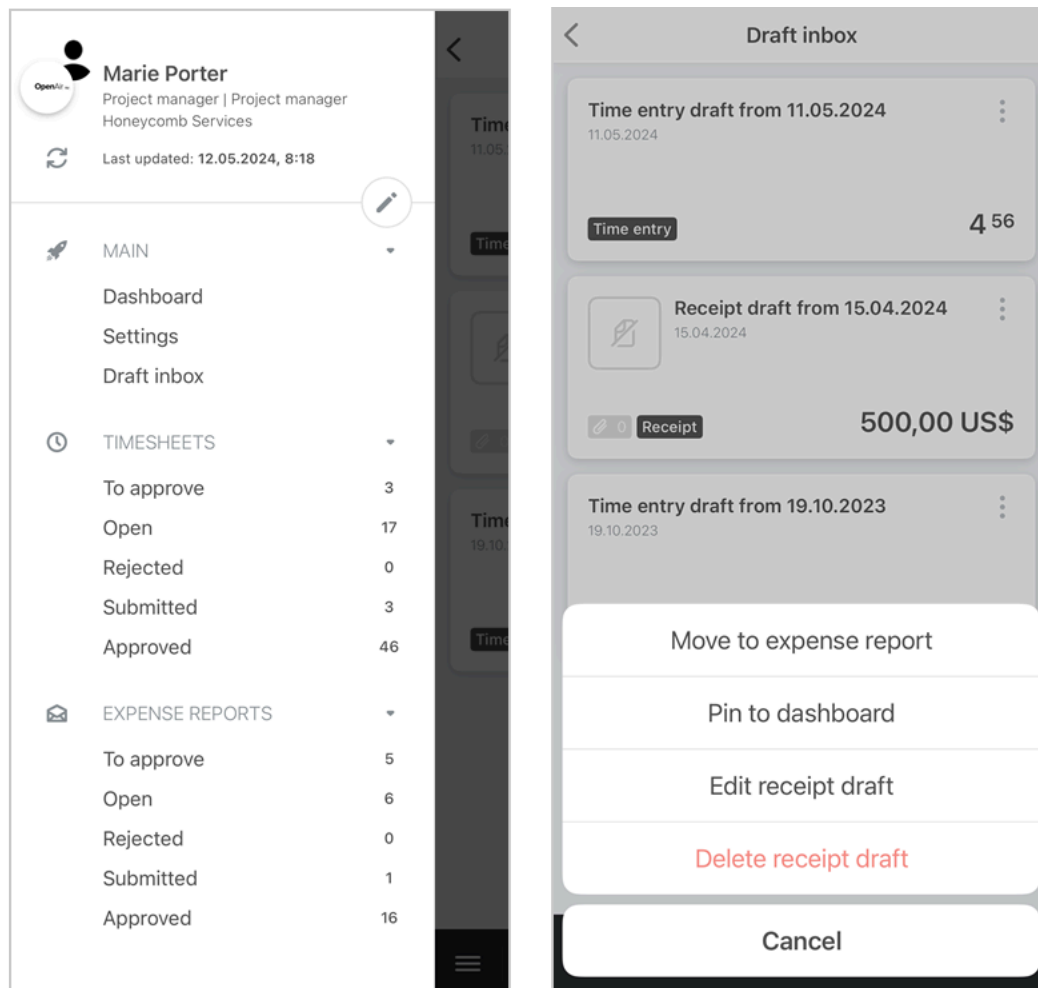
You can create draft time entries and receipts and pull these drafts when you're ready to complete your timesheet or expense report in OpenAir Mobile. Draft receipts and time entries are available even when your mobile is not connected to the internet.

You can edit or delete draft time entries and receipts at any time and pin them to your dashboard or use widgets to add a draft or attach a file to a draft receipt. See [Widget gallery](#).

## Draft Inbox

You can use the draft inbox from the navigation drawer to create draft time entries or receipts.

**Note:** Drafts are stored locally on your mobile device. The information in draft time entries and receipts is sent to OpenAir only after you add it to a timesheet or expense report and the data synchronization runs.



From the draft inbox, tap the more icon  next to a receipt draft or time entry draft, then:

- To move the receipt or time entry draft to an expense report or a timesheet, tap **Move to expense report** or **Move to timesheet**.



- To edit the receipt draft or time entry draft, tap **Edit receipt draft** or **Edit time entry draft**.
- To pin the receipt or time entry draft to the dashboard, tap **Pin to dashboard**. See [Pinned Timesheets, Expense Reports or Receipts](#).  
If the item is already pinned to the dashboard, the context menu shows an **Unpin from dashboard** option instead.
- To delete the receipt or time entry draft, tap **Delete receipt draft** or **Delete time entry draft**.

## Draft Time Entry

The time entry draft adds a quick information entry. The time entry draft form includes only the most important standard fields and ignores the usual standard and custom business rules for time entries in your company's OpenAir account.

**Note:** Time entry drafts may contain errors if your company requires specific information about time entries.

The screenshot shows a mobile application interface for editing a time entry draft. At the top, there is a title bar with a close icon (X), the text 'Edit time entry draft', and a 'DONE' button. Below the title bar, the form content is as follows:

- Title:** Time entry draft from 2/15/24
- Date:** 2/15/24
- Category:** Time entry (with a speech bubble icon)
- Duration:** 9:00
- Main Section:** A section header 'Main' is followed by several fields:
  - Name:** Time entry draft from 2/15/24
  - Date (Required):** Thu 2/15/24 (with a right-pointing chevron icon)
  - Time:** 9:00
  - Notes:** Time entry draft

To add or edit any information about the form:

- **Name** — The time entry draft name is generated automatically and includes the exact same date you created the time entry draft. To edit the name of the receipt draft, tap the line and use the on-screen keyboard to enter a name, tap the clear icon to clear the selected date.

- **Date** — The time entry draft date is required information with the mention **Required**. To edit the date, tap the line and pick a date from the calendar, tap the clear icon to clear the selected date.
- **Time** — Depending on your time entry preferences, you may need to choose a time entry method. To change your time entry preferences, tap **Change time entry preferences**. You can change these preferences at any time, see [Time Entry](#)
  1. **Time Picker - Duration** — The time picker lets you enter the number of hours and minutes you worked.
  2. **Time Picker - Start time and end time** The time picker lets you select a start time and end time using sliders.

For more information about the **Time picker** options, see [Using the Time Entry Form and Time Picker](#).
- **Notes** — You can add some additional notes before saving the receipt.

## Draft Receipt

The receipt draft adds a quick information entry. The receipt draft form includes only the most important standard fields and ignores the usual standard and custom business rules for time entries in your company's OpenAir account.

The screenshot displays the 'Edit receipt draft' screen in a mobile application. At the top, there is a title bar with a close icon (X), the text 'Edit receipt draft', and a 'DONE' button. Below the title bar, the main content area shows the following information:

- Receipt draft from 4/17/24** (with a sub-date of 4/17/24)
- A status bar with a pencil icon, a speech bubble icon, and the word 'Receipt'.
- The amount **\$125.00**.
- A section header **Main**.
- Name**: Receipt draft from 4/17/24
- Date (Required)**: Wed 4/17/24 (with a right-pointing chevron)
- Price**: 125
- Currency**: USD (with a right-pointing chevron)
- Notes**: Receipt
- An attachment icon (camera and document) with the text 'There are no attachments.'




To add or edit any information about the form:

- **Name** — The receipt draft name is generated automatically and includes the exact same date you create the receipt draft. To edit the name of the receipt draft, tap the line and use the on-screen keyboard to enter a name, tap the clear icon to clear the selected date.
- **Date** — The receipt draft date is required information with the mention **Required**. To edit the date, tap the line and pick a date from the calendar, tap the clear icon to clear the selected date.
- **Price** — To enter the price of the foreign receipt and receipt currency.
- **Currency** — To create a receipt you use if you incurred the expenses in a currency other than your base currency:
  - Tap the **Currency** tab.
  - Select a currency from the list of currencies shown.
- **Notes** — You can add some additional notes before saving the receipt.
- **Attachments** — You can add or delete attachments directly from the form. For more information, see [Working with Image Attachments on Expense Reports Receipts and Receipt drafts](#).

## Creating a Draft

You can create a receipt or time entry draft at any time from the draft inbox or from the widgets on your dashboard. For more information, see [Working with the OpenAir Mobile Dashboard](#).


### To create a receipt or time entry draft from the draft inbox:

1. Do one of the following:
  - On the dashboard, tap the **Create draft time entry** or **Create receipt draft** widget or the **Create** widget and then tap the Receipt draft or Time entry draft. See [Widget gallery](#).
  - Tap the menu icon  from any list or from the dashboard to go to the **Draft inbox**.
2. In the navigation drawer, tap the **Draft inbox** option.
3. Tap the add icon  (iPhone) or the add button  (Android) in the toolbar.
4. From the menu choose the **Receipt draft** or **Time entry draft** option.
5. Add or edit the information on the draft receipt or time entry form.
6. When you are ready to complete your timesheet or expense report, you can:
  - Move draft time entries or receipts to a timesheet or expense report from your draft inbox. See [Moving a Time Entry Draft to a Timesheet](#) or [Moving a Receipt Draft to an Expense Report](#).
  - Pull draft receipts into your expense report. See [Moving a Receipt Draft to an Expense Report](#).
  - Drag draft time entries to a time card on your timesheet. See [Moving a Time Entry Draft to a Timesheet](#).

## Moving a Time Entry Draft to a Timesheet

You can move a time entry draft to a timesheet from the draft inbox.

### To move time entry drafts to a timesheet from the draft inbox:


1. On the draft inbox screen, tap the more options icon  next to a time entry draft.
2. Tap the **Move to timesheet** option.

3. Select a timesheet to move the time entry draft to.
4. Add or edit the details of the time entry draft form. See also, [Adding Time Entries from the Draft Inbox](#).

## Moving a Receipt Draft to an Expense Report

You can move a receipt draft to an expense report from the draft inbox.


### To move receipt drafts from the draft inbox:

1. On the draft inbox screen, tap the more options icon  next to a receipt draft.
2. Tap the **Move to an expense report** option.
3. Select an expense report to move the receipt draft to.
4. Add or edit the details of the receipt draft form. See also [Adding receipts using the Draft Inbox](#).

## Deleting a Draft

You can delete a receipt or time entry draft at any time from the draft inbox.

### To delete a receipt or time entry draft from the draft inbox:

1. On the draft inbox screen, tap the more options icon  next to a receipt or time entry draft.
2. Tap the **Delete receipt draft** or **Delete time entry** option.  
A confirmation dialog appears.
3. Tap **Delete** to delete the draft from the draft inbox.

# Working with Timesheets in OpenAir Mobile

To access the list of Timesheets To Approve, Open Timesheets, Submitted Timesheets, Rejected Timesheets or Approved Timesheets, tap the corresponding status row in the navigation drawer. See [Navigating OpenAir Mobile](#).

You can create, edit, submit, approve or reject timesheets using OpenAir Mobile. Your timesheet data is updated automatically in real-time when your device is connected to the internet.

If you are using OpenAir Mobile on an **iPhone**, you can continue to work with timesheets when offline. When you are connected to the internet again, the synchronization will run automatically in the background every 4 hours, or you can trigger it manually to update OpenAir — see [Synchronizing OpenAir Mobile with OpenAir](#).

The following help topics introduce the different screen and features in the OpenAir Mobile Timesheets module:

- [Timesheets Lists in OpenAir Mobile](#) — Timesheets lists give you a quick overview of your timesheets by status. You can search for timesheets by name and perform certain actions on one or multiple timesheets at the same time.
  - [Bulk Actions in Timesheets Lists](#)
  - [Timesheet Summary in Lists](#)
- [Timesheets in OpenAir Mobile](#) — You can use timesheets in OpenAir Mobile to record your time and submit it for approval. OpenAir Mobile 3 introduced the following features:
  - [Time Cards](#) — Time cards are subdivision of timesheets. You can use time cards to keep your time entries organized by project or task.
  - [Time Entry Form and Time Picker](#) — The time entry form and time picker lets you enter and edit all the time entry information quickly and easily.
  - [Time Entry Bulk Edit](#) — The time entry bulk-edit mode lets you add or edit multiple time entry cells with the same information.
  - [Timesheet History and Timesheet Errors](#) — The history shows the submission and approval history of each timesheet and any timesheets warnings or errors.

The following help topics describe the most common processes you may use when working with timesheets.

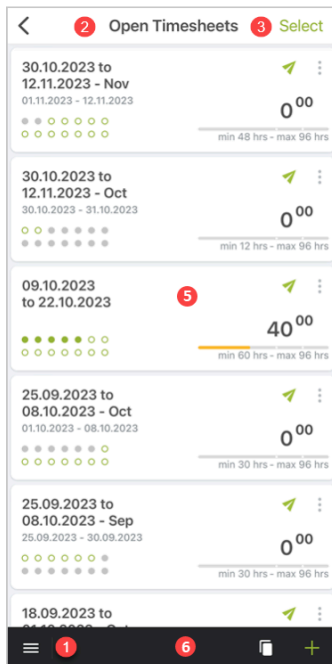
- [Creating a Timesheet](#)
- [Editing Timesheet Properties](#)
- [Deleting a Timesheet](#)
- [Adding a Time Card to a Timesheet](#)
- [Editing Time Card Properties](#)
- [Deleting a Time Card](#)
- [Adding or Editing Time Entries](#)
- [Deleting Time Entries](#)
- [Submitting Timesheets](#)
- [Approving or Rejecting Timesheets](#)

## Timesheets Lists in OpenAir Mobile

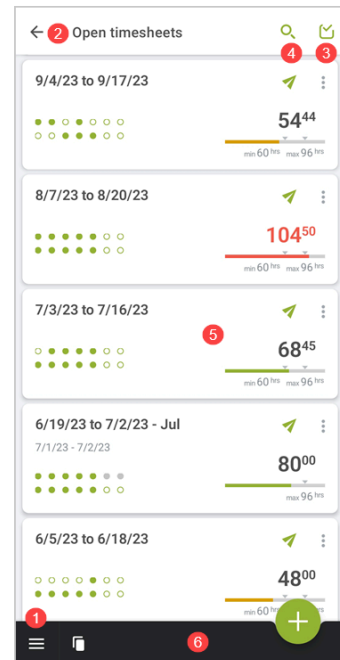
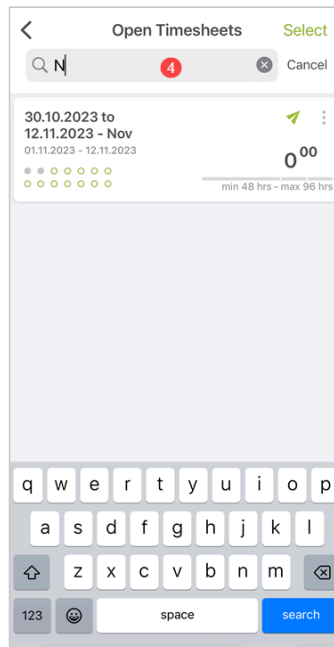
Timesheets lists give you a quick overview of your timesheets by status. You can search for timesheets by name and perform certain actions on one or multiple timesheets at the same time.

To access the list of Timesheets To Approve, Open Timesheets, Submitted Timesheets, Rejected Timesheets or Approved Timesheets, tap the corresponding status row on the in the navigation drawer. See [Navigating OpenAir Mobile](#).




- The list shows timesheets on the navigation drawer in descending date order — the most recent first. See [Working with the OpenAir Mobile Navigation Drawer](#).
- The list shows only timesheets for periods within the last two years. The navigation drawer indicates the total number of timesheets per status in OpenAir but you can only view timesheets for the last two years using OpenAir Mobile.
- The Approved timesheets list shows up to a maximum of 10 timesheets. The navigation drawer indicates the total number of approved timesheets in OpenAir but you can only view the 10 most recent approved timesheets using OpenAir Mobile.







iPhone



Android




1	<b>Menu</b> — To view the navigation drawer, tap the menu icon  from any lists or from the dashboard. See <a href="#">Navigating OpenAir Mobile</a> .
2	<b>Title</b> of the current list.
3	<b>Bulk actions</b> — OpenAir Mobile lets you perform actions on multiple timesheets at one time. When the option is available, the app shows a <b>Select</b> link ( <b>iPhone</b> ) or a select icon  ( <b>Android</b> ) in the top right corner of the screen. See <a href="#">Bulk Actions in Timesheets Lists</a> .
4	<b>Search</b> — To find a timesheet, swipe down to see the search bar ( <b>iPhone</b> ) or tap the search icon  ( <b>Android</b> ) and type a few characters. The timesheets are filtered as you type and the list shows only timesheets with information matching your search string.
5	<b>Timesheet summary</b> — The timesheet summary gives a quick overview of your timesheet. See <a href="#">Timesheet Summary in Lists</a> .  To navigate to a timesheet, tap the corresponding timesheet summary. From the timesheet, you will be able to perform all the actions permitted according to your role permissions and to the timesheet status.  The timesheet summary is highlighted with a red color outline if there any submission or synchronization errors ( <b>iPhone</b> ) for this timesheet. See <a href="#">Timesheet History and Timesheet Errors</a> .


## 6 Actions toolbar — The actions toolbar includes all the actions available in the list.




- From the open timesheets list:
  - To copy an existing timesheet, tap the clone icon .
  - To create a new timesheet from blank, tap the add icon  (**iPhone**) or the add button  (**Android**).
  - To view the navigation drawer, tap the menu icon  to return to the dashboard tap outside of the navigation drawer. From the dashboard or the navigation drawer, you can navigate to other lists in OpenAir Mobile, review the app configuration settings, or synchronize your data. See [Navigating OpenAir Mobile](#)

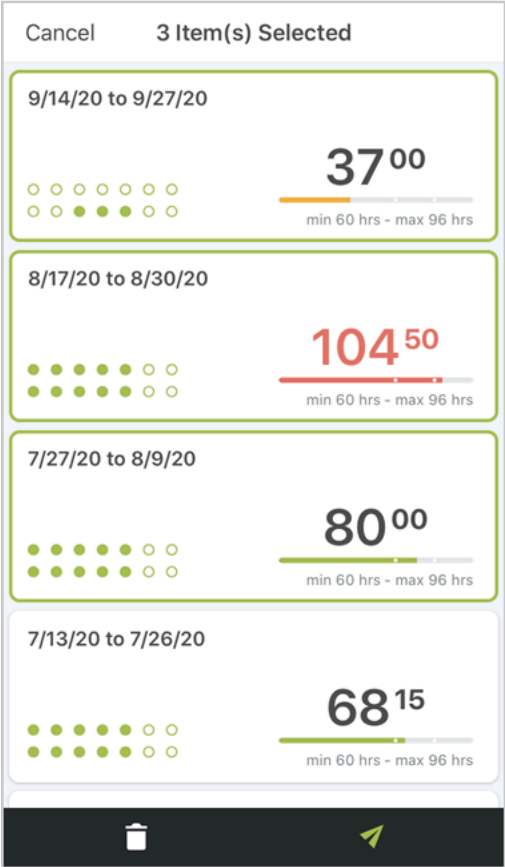
## Bulk Actions in Timesheets Lists

To select multiple timesheets in the Timesheets To Approve, Open Timesheets and Rejected Timesheets lists, tap **Select (iPhone)** or the select icon  (**Android**) then tap the timesheets you want to select.

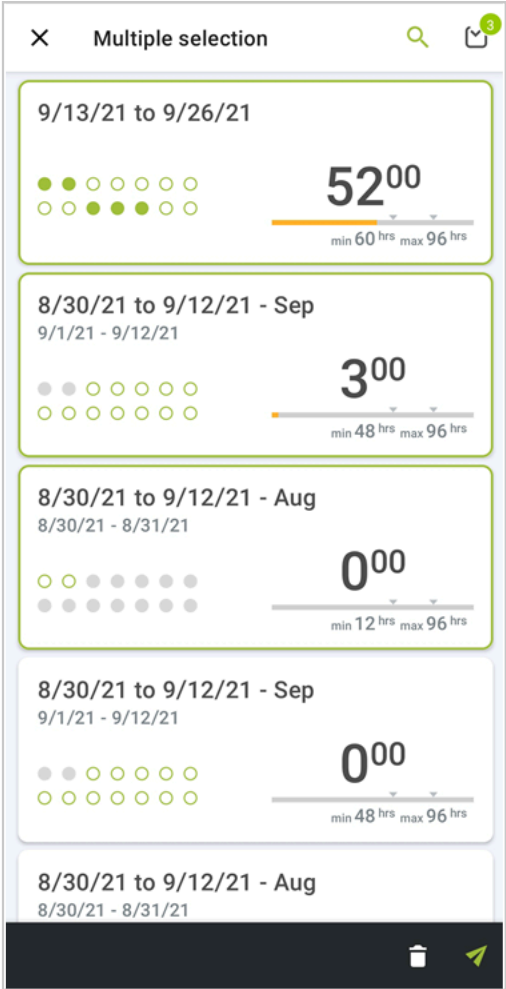
- The number of items selected shows at the top (**iPhone**), in place of the list title or on the select icon  (**Android**).
- The items selected are highlighted with a green outline.
- The actions you can perform depend on the list:
  - For open or rejected timesheets:
    - To submit the selected timesheets, tap the submit icon .
    - To delete the selected timesheets, tap the delete icon .

 **Note:** These actions may not be available if your device is not connected to the internet and if one of the selected timesheet summaries shows a “To sync” tag. The “To sync” tag indicates that there is already an action pending for this timesheet. You may be able to perform the action after the device is connected to the internet again and the synchronization completes.

- For timesheets to approve:
  - To approve the selected timesheets, tap the check mark icon .
  - To reject the selected timesheets, tap the reject icon .
- To exit the bulk-action mode and return to the list, tap **Cancel (iPhone)** or the close icon  (**Android**).



iPhone

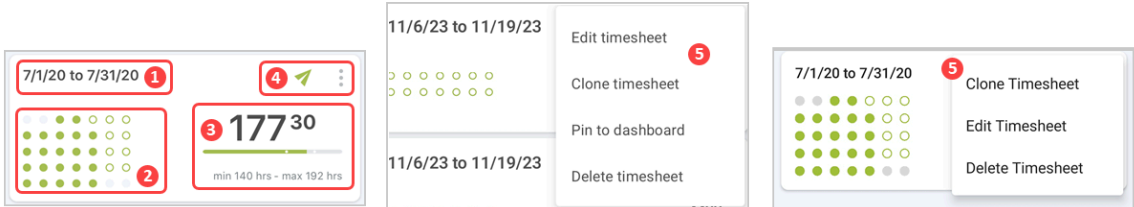


Android

### Timesheet Summary in Lists

The timesheet summary gives a quick overview of your timesheet, and lets you perform certain actions, depending on your role permissions and on the timesheet status.

The timesheet summary is highlighted with a red color outline if there any submission or synchronization errors for this timesheet. See [Timesheet History](#) and [Timesheet Errors](#).














iPhone

Android

- 1 Timesheet name & dates** — The summary shows the name of the timesheet in bold and the period it covers (start date — end date) underneath it. In the Timesheets to approve list, the summary also shows the name of the employee who submitted the timesheet.



	<p> <b>Note:</b> The summary does not show the dates if the timesheet name is generated automatically and includes the exact same date.</p>
	<p>A “To sync” tag appears under the timesheet name and dates if you made changes to the timesheet using OpenAir Mobile but the updated data has not been sent to the OpenAir server data. This may happen if your device is not connected to the internet or briefly if OpenAir Mobile is preparing or running data synchronization with the OpenAir server. See <a href="#">Synchronizing OpenAir Mobile with OpenAir</a>.</p>
2	<p><b>Days with time entries</b> — The grid of dots shows at a glance the days with time entries (solid green) ● and the days for which you can (green outline) ○ or cannot (solid gray) ■ record time entries. The days with a solid gray dot are not in the timesheet period.</p> <p> <b>Note:</b> The length of a timesheet period is set by your company's OpenAir account administrator. The example pictured above shows a period of calendar month. The time entry grid only displays the weeks covered by the timesheet period.</p>
3	<p><b>Time total</b> — The timesheet summary shows the total time recorded in the timesheet.</p> <p>If there are timesheet rules set on your company's OpenAir account defining a minimum or maximum total number of hours for each timesheet, a progress bar shows underneath the time total. The bar gives a visual representation of the time entered on the timesheet and shows the minimum and maximum number of hours.</p> <ul style="list-style-type: none"> <li>■ If the number of hours entered is between the minimum number of hours required and maximum number of hours allowed, the progress bar shows in green color.</li> <li>■ If the number of hours entered is below the minimum required or above the maximum allowed, the progress bar shows either in orange or red color. The orange color indicates that you may submit the timesheet but a warning will appear when you submit the timesheet. The red color indicates that you will not be able to submit the timesheet.</li> </ul>
4	<p><b>Actions</b> — You can perform some actions straight from the timesheet summary in the list. The actions you can perform depend on the timesheet status:</p> <ul style="list-style-type: none"> <li>■ For open timesheets: <ul style="list-style-type: none"> <li>□ To submit the timesheet, tap the submit icon .</li> <li>□ To show a context menu with more options, tap the more icon .</li> </ul> </li> <li>■ For timesheets to approve: <ul style="list-style-type: none"> <li>□ To approve the timesheet, tap the check mark icon .</li> <li>□ To reject the timesheet, tap the reject icon .</li> </ul> </li> <li>■ For submitted and approved timesheets: <ul style="list-style-type: none"> <li>□ To copy the timesheet, tap the clone icon .</li> </ul> </li> <li>■ For rejected timesheets <ul style="list-style-type: none"> <li>□ To re-submit the timesheet, tap the submit icon .</li> <li>□ To copy the timesheet, tap the clone icon .</li> </ul> </li> </ul> <p> <b>Note:</b> Some of these actions may not be available if your device is not connected to the internet and there is a Submit or Delete action pending for the timesheet. You may be able to perform the action after the device is connected to the internet again and the synchronization completes.</p>
5	<p><b>More actions</b> — For open and rejected timesheets, tap the more icon  then:</p> <ul style="list-style-type: none"> <li>■ To copy the timesheet, tap <b>Clone Timesheet</b>.</li> <li>■ To edit the timesheet properties, tap <b>Edit Timesheet</b>.</li> <li>■ To delete the timesheet, tap <b>Delete Timesheet</b>.</li> </ul>

- To pin the timesheet to the dashboard, tap **Pin to dashboard**. See [Pinned Timesheets](#), [Expense Reports](#) or [Receipts](#).

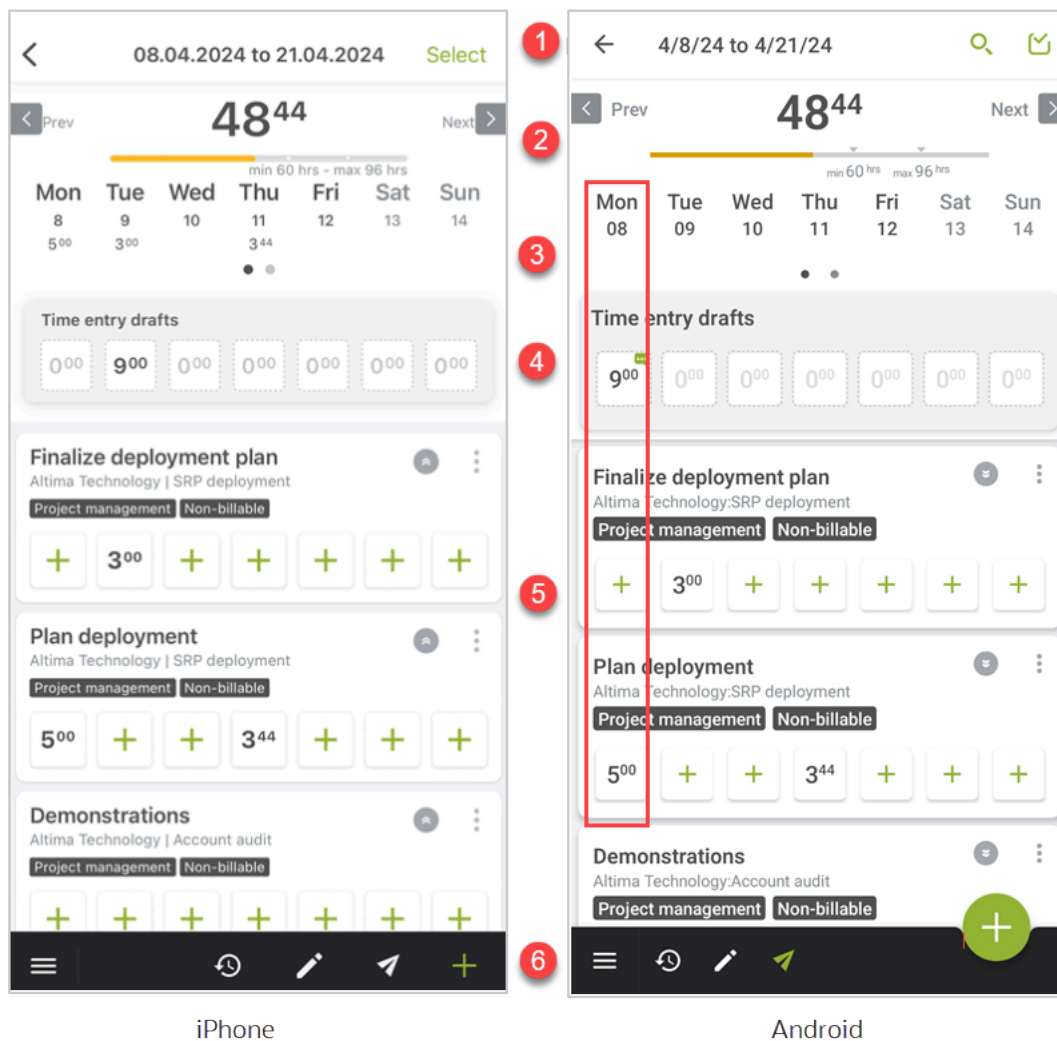
If the item is already pinned to the dashboard, the context menu shows an **Unpin from dashboard** option instead.

**Note:** The more actions icon is not available if your device is not connected to the internet and there is a Submit or Delete action pending for the timesheet.

## Timesheets in OpenAir Mobile



You can use timesheets in OpenAir Mobile to record your time and submit it for approval. Your timesheets in OpenAir Mobile are synchronized automatically with your timesheets in OpenAir.

In a timesheet list, tap a timesheet summary to see your time entries in a week view.




iPhone


Android

- Timesheet header** — The timesheet header shows the name and dates of the timesheet you are viewing in the center, a back arrow and a **Select** link (**iPhone**) or a back arrow ←, a select icon  and a search icon  (**Android**). If you are viewing a timesheet awaiting your approval, the header also includes the name of the employee who submitted the timesheet.

**Note:** The header does not show the dates if the timesheet name is generated automatically and includes the exact same date.

- To return to the list, tap the back arrow < (**iPhone**) and back icon ← (**Android**). From the list, you navigate to other timesheets, navigate back to the dashboard, or perform actions on single and multiple timesheets. See [Timesheets Lists in OpenAir Mobile](#).
- Tap the Timesheet header to view and edit the Timesheet properties.
- **Bulk edit** — OpenAir Mobile lets you edit multiple time entries at one time. Tap **Select** (**iPhone**) or the select icon  (**Android**) to enter the bulk-edit mode. See [Time Entry Bulk Edit](#).

**Note:** The bulk-edit mode may not always be available depending on your company's OpenAir account configuration. For example, if your time cards are associated to a project but not to a specific task, and if you can select different tasks for each time entry, you will not be able to edit multiple time entries in one go. If this is the case, the timesheet screen does not show the **Select** link (**iPhone**) or the select icon (**Android**).

- **Search** — To find a time card, swipe down to see the search bar (**iPhone**) or tap the search icon  (**Android**) and type a few characters. The time cards are filtered as you type and the timesheet shows only time cards with information matching your search string.

## 2 Time total and Timesheet navigation — The total time recorded in the timesheet is indicated in bold.

To navigate to the previous timesheet or the next timesheet, tap **Prev** or **Next**. If the link and arrow icon appear in light gray color, you have reached the first or last available timesheet.

If there are timesheet rules set on your company's OpenAir account defining a minimum or maximum total number of hours for each timesheet, a progress bar shows underneath the time total. The bar gives a visual representation of the time entered on the timesheet and shows the minimum and maximum number of hours.

- If the number of hours entered is between the minimum number of hours required and maximum number of hours allowed, the progress bar shows in green color.
- If the number of hours entered is below the minimum required or above the maximum allowed, the progress bar shows either in orange or red color. The orange color indicates that you may submit the timesheet but a warning will appear when you submit the timesheet. The red color indicates that you will not be able to submit the timesheet.

## 3 Week view and week navigation — The week view shows the time entered for the selected week. Each day is a column in the timesheet grid with time entries aligned under each day of the week. The calendar shows the total time entered for each day.

The day, date and total time entered for the day show in one of the following colors:

- Green color if the day is today.
- Dark gray color if the day is a week day and there is at least one time card in the timesheet with an enabled time entry cell for that day.
- Medium gray color if the day is a weekend day and there is at least one time card in the timesheet with an enabled time entry cell for that day.
- Light gray color if there are no time cards in the timesheet with an enabled time entry cell for that day.

If your timesheet period covers more than one week, swipe the calendar or any time card row right or left to view the next or previous week. Dots under the calendar indicate the number of weeks covered by the timesheet and the week you are currently viewing — e.g. . . . . . indicates the third week of five weeks covered (fully or partially) by the timesheet period.










**Note:** If the timesheet status is open or rejected and there is at least one time card in the timesheet, the timesheet week view scrolls automatically to the first week with time entry cells that you can edit. This would happen in the following example scenarios, depending on your account configuration:

- You open a timesheet covering the later part of a split two-week period including a month change in the second week. The timesheet includes both weeks but you can only edit time entries from the 1st day of the month in the second week — the week view scrolls automatically to show the second week.
- You open a timesheet covering a full calendar month with one time card and the time card is associated to a task starting part through the month. The time sheet includes all weeks in the calendar month but you can only edit time entries for the dates associated with the task — the week view scrolls automatically to show the week including the task start date.

**4 Time entry drafts** — The time entry drafts are available on all editable timesheets. The time entry drafts shows all drafts created in the draft inbox, which are associated with the specific timesheet. Drag draft time entries to a time card on your timesheet. See [Moving a Time Entry Draft to a Timesheet](#).

**5 Time cards** — Time cards are subdivision of timesheets associated to a specific project and/or task. All time entries are added to a time card. See [Time Cards](#).

**6 Actions toolbar** — The actions toolbar includes all the actions available for the timesheet you are viewing:

- To view the history of your timesheet and any errors associated with your timesheet, tap the history icon . On **iPhone**, the history icon shows a red dot  if there are any errors associated with the timesheet. See [Timesheet History and Timesheet Errors](#).
- To edit or view the timesheet properties, tap the edit properties icon .
- To submit the timesheet, tap the submit icon .
- To add a new time card from blank, tap the add icon  (**iPhone**) or the add button  (**Android**).
- To approve the timesheet, tap the check mark icon .
- To reject the entire timesheet or selected time entries, tap the reject icon .
- To view the navigation drawer, tap the menu icon .

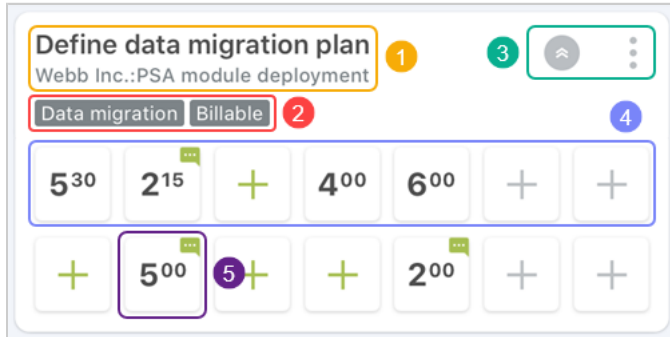
**Note:** On **iPhone**, some of these actions may not be available if your device is not connected to the internet and there is a Submit or Delete action pending for the timesheet. You may be able to perform the action after the device is connected to the internet again and the synchronization completes.

## Time Cards

Time cards are subdivision of timesheets. You can use time cards to keep your time entries organized. Each time card is associated to a specific project or task. It shows all your time entries and other useful information such as service and job code tags. All time entries are added to a time card.

**Note:** There cannot be two time cards with exactly the same header information (main information) and tags (additional settings) on the same timesheet.

Time cards must contain time entries to be saved. Any empty time cards will disappear if you close the timesheet and open it again.






**1 Time card header** — The time card header can include the following information: Task name, Customer name and Project name.

**Note:** Depending on your company's OpenAir account configuration, your recorded time may be associated to a customer, project and task at the time card, or the time entry level. If the customer, project and task association is at the time entry level, the time card header shows the text "Multiple values"

**2 Time card tags** — Time card tags can include additional information associated with the task or the time card: Service Type (e.g. Data migration), Job Code (e.g. "PM"), Payroll Type.

**3 Actions** — The following actions are available:

- To hide the time card tags, tap the collapse icon  or to show the time card tags, tap the expand icon .
- To show a context menu with time card actions, tap the more icon  then:
  - To add a new row to the time card, tap **Add row (iPhone)** or **Add new time card row (Android)**.
  - To create a copy of the time card with the same values as the current time card, tap **Clone time card**.
  - To edit the time card properties, tap **Edit time card**.
  - To delete the time card, tap **Delete time card**.


**4 Time card row** — Single row of time entries. It contains one time entry cell for each day of the week (each day corresponds to a column in the timesheet week view grid). This is roughly equivalent to the timesheet row in the OpenAir web application.



You can add multiple rows to the time card if you want to add multiple time entries for the same day in the same time card. If you enter time entries on multiple rows, a time entry cell will automatically move to the row above if the time entry cell immediately above is empty.

**5 Time entry cell** — Time entry cells are displayed in a grid with a column for each day of the week and a row for each time card row. Time entry cells show:

- The time entry value in hours and minutes when a value is present — For example, **7<sup>45</sup>** shows 7 hours and 45 minutes.

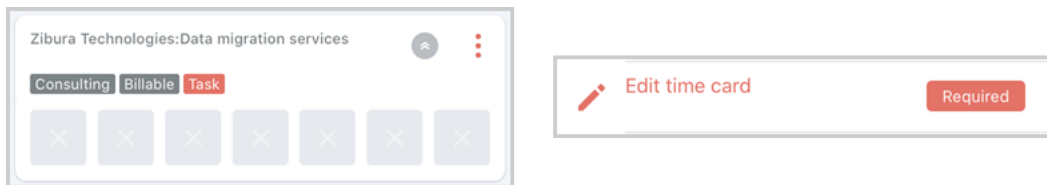
**Note:** The possible values for the number of minutes are determined by your company's OpenAir account configuration.

- The add icon  (in green color for working week days or in gray color for weekend days) when the time entry cell is empty (no value).

- A notes icon  in the top right corner of the cell when there are some notes for the time entry.
- A gray background color with a disabled cell icon  when you cannot add a time entry — for example, if the day is out of the timesheet period or if time entries are not permitted for that day.

Tap a cell to add or edit a time entry. The time entry form appears at the bottom of the screen. The time entry cell you are currently editing is highlighted with a solid green background if there are no errors or with a solid red background if there are errors in the time entry. See [Time Entry Form and Time Picker](#).

If there is an error in the time card properties, the more icon shows in red color and all the time entry cells are disabled. This may happen after synchronization if some required information was missing in the data downloaded from the OpenAir server. In the example pictured below, the **Task** is a required field but it is missing from the time card properties. The time card tags include a red tag indicating the missing required information. If you tap the more icon to open the context menu, the **Edit Time card** menu option shows in red color and with a “Required” tag.

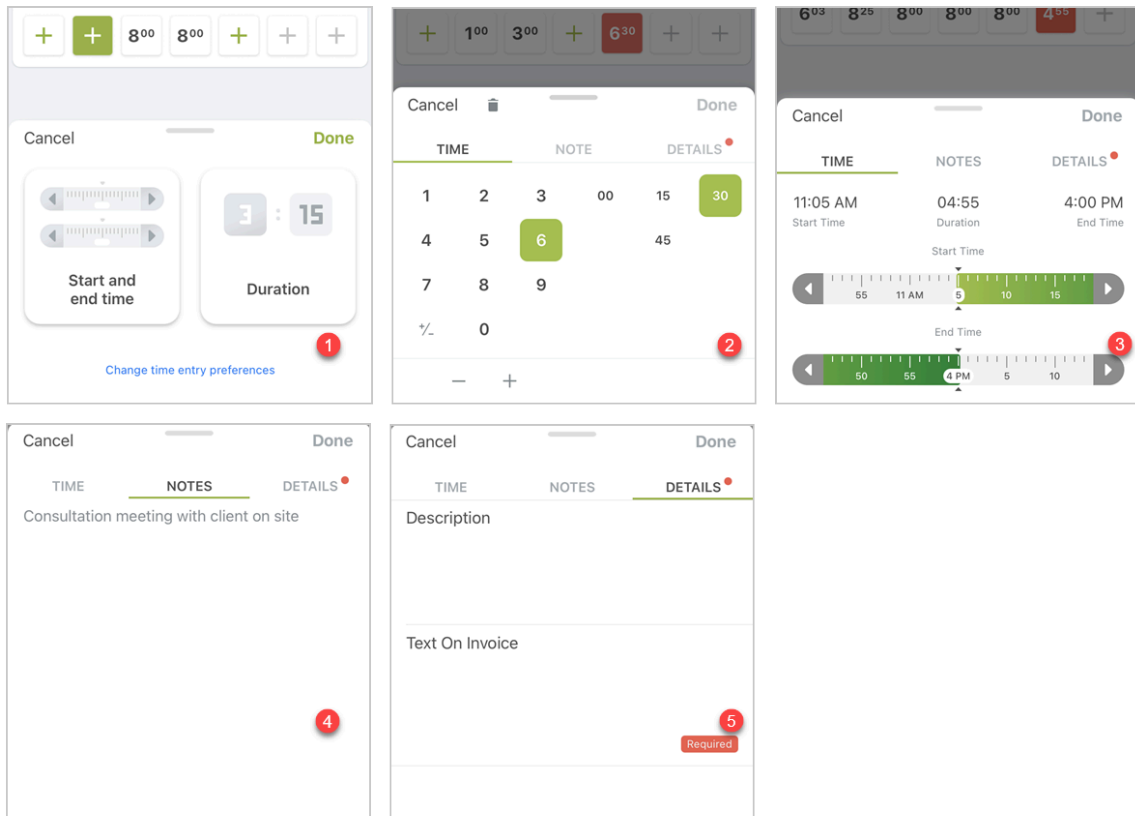


## Time Entry Form and Time Picker

The time entry form and time picker let you enter and edit all time entry information. See also [Using the Time Entry Form and Time Picker](#).

Tap a cell to add or edit a time entry. The time picker screen appear in the bottom part of the screen.

**Note:** The time entry cell you are currently editing is highlighted with a solid green color background if there are no errors



**1 Time Entry Method** — Depending on your time entry preferences, you may need to choose a time entry method. To change your time entry preferences, tap **Change time entry preferences**. You can change these preferences at any time, see [Time Entry](#).

**2 Time Picker - Duration** — The time picker lets you enter the number of hours and minutes you worked.

- Tap a digit from 0–9 on the left to set the number of hours.
- Tap an option on the right to set the number of minutes.


**Note:** The possible values for the number of minutes are determined by your company's OpenAir account configuration.

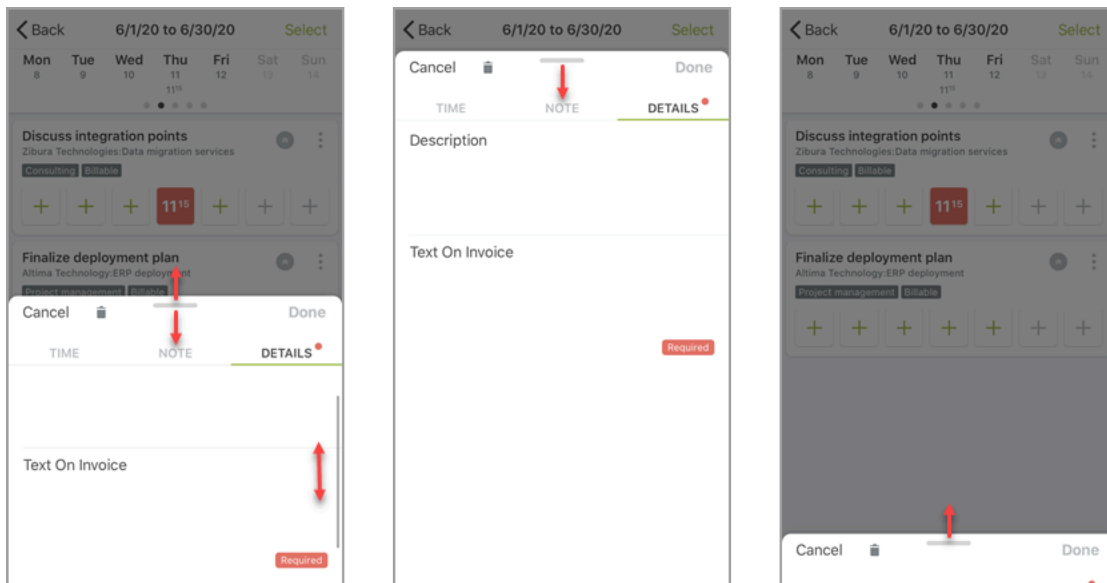
- Tap +/- to change the time entry to a negative or positive value.
- Tap + or — to increase or decrease the number of hours by one hour. You can use this to set time entries of 10 hours and over.

After you have entered a value:

- The time entry cell you are currently editing may be highlighted with a solid red color background if there are any errors. In the example pictured above, some additional information is required in the **Details** tab. Time entry errors are indicated by a red color dot ● next to the tab title. You will not be able to save and close the time entry form until all errors are resolved.
- To save and close the time entry form, tap **Done** or tap another time entry cell. The **Done** link appears in green color when there are no errors on the time entry form and in gray color when there are errors on the form and saving the form is disabled.

	<ul style="list-style-type: none"> <li>To discard the changes made and return to the timesheet, tap <b>Cancel (iPhone)</b> or the close icon <b>✕ (Android)</b> then tap <b>Discard</b> in the confirmation dialog.</li> <li>To delete the time entry and return to the timesheet, tap the delete icon <b>🗑</b> then tap <b>Delete</b> in the confirmation dialog.</li> </ul>
<b>3</b>	<p><b>Time Picker - Start time and end time</b> The time picker lets you select a start time and end time using sliders.</p> <p>The time picker shows the start time, duration, and end time at the top. When adding a new time entry, the time picker shows default values based on the default start time and duration set in your preferences. For more information about setting your time entry preferences, see <a href="#">Time Entry</a>.</p> <ul style="list-style-type: none"> <li>Flick the start time slider and scroll to the left or right to set the start time. If you did not change the end time before changing the start time, note that the end time changes with the start time to match the default duration.</li> <li>Flick the end time slider and scroll to the left or right to set the end time. The end time is highlighted with a gray color while you scroll the slider.</li> </ul> <p>You can tap the left and right arrows on the start and end time slider for more precision. Each tap changes the value by one minute.</p>
<b>4</b>	<p><b>Notes</b> — Enter any time entry notes in the <b>Notes</b> tab, if required.</p>
<b>5</b>	<p><b>Details</b> — Depending on your company's OpenAir account configuration, additional details may be required when adding a time entry. You need to enter all the required details to save and close the time entry form. Required fields show a red "Required" tag.</p>

The size of the time entry form is optimized to fit the time picker and to let you view the time entry you are editing. You can swipe to scroll the time entry form to view all fields in the Details tab. You can also drag the bar  at the top of the form (**iPhone**) or anywhere on the form (**Android**) to maximize or minimize the time entry form.




## Time Entry Bulk Edit



The time entry bulk-edit mode lets you add or edit multiple time entry cells with the same information.

To select multiple time entry cells in the timesheet you are currently viewing, tap **Select (iPhone)** or the select icon **☑ (Android)** then tap to select or unselect time entry cells across one or multiple time cards.



Use the time picker to set the same value for selected time entry cells, or add the same notes and details to all selected time entries.

 **Note:** The bulk-edit mode may not always be available depending on your timesheets configuration. For example, if your time cards are associated to a project but not to a specific task, and if you can select different tasks for each time entry, you will not be able to edit multiple time entries in one go. If this is the case, the timesheet screen does not show the **Select** link (**iPhone**) or the select icon (**Android**).

- You can select multiple time entry cells across multiple rows, multiple time cards and multiple weeks in the same timesheet.
- You can select and unselect time entry cells at any time when in bulk-edit mode. This allows to add or edit different sets of time entries and to make the same changes to as many or as few time entry cells as required.
- The number of time entry cells selected shows at the top, in place of the timesheet title.
- The time entry form appears if you select one or more time entry cells. The time entry form shows any values (hours, minutes, note and details fields) which are the same for all selected time entry cells. It shows the text “Multiple values” for **Note** and **Details** fields if the field values are different across the selected time entry cells.
- The selected time entry cells are highlighted with a green color outline if there are no errors for these time entries.
- The selected time entry cells are highlighted with a red color outline if there are errors for these time entries. If a time entry is highlighted with a red color outline, some required information is missing — a time value or a required field in the **Details** tab. A red color dot • next to the tab title indicates there is an error in the tab for any of the selected time entries.
- Modified time entry cells which are not currently selected show a red color dot • in the top right corner if there are errors for these time entries.
- To clear the selected time entry cells, tap the delete icon . All time entry information in the selected cells will be cleared immediately.
- To save all changes made, exit the bulk-edit mode and return to the timesheet, tap **Done** in the top right corner of the timesheet screen.
- To discard all changes made, exit the bulk-edit mode and return to the timesheet, tap **Cancel (iPhone)** or the cancel icon  (**Android**) in the top left corner of the timesheet screen then tap **Discard** in the confirmation dialog.

Cancel    4 Item(s) Selected    Done

Mon	Tue	Wed	Thu	Fri	Sat	Sun
20	21	22	23	24	25	26
9 <sup>45</sup>	9 <sup>00</sup>	9 <sup>00</sup>	9 <sup>00</sup>	9 <sup>00</sup>		

Discuss integration points  
Webb Inc.:HRMS integration



Consulting    Billable


145	100	100	100	100	+	+
8 <sup>00</sup>	8 <sup>00</sup>	8 <sup>00</sup>	8 <sup>00</sup>	8 <sup>00</sup>		+

TIME	NOTE	DETAILS
1	2	3
		00
		15
		30
4	5	6
		45
7	8	9
+/-	0	

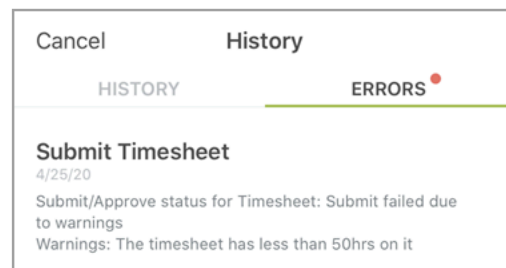
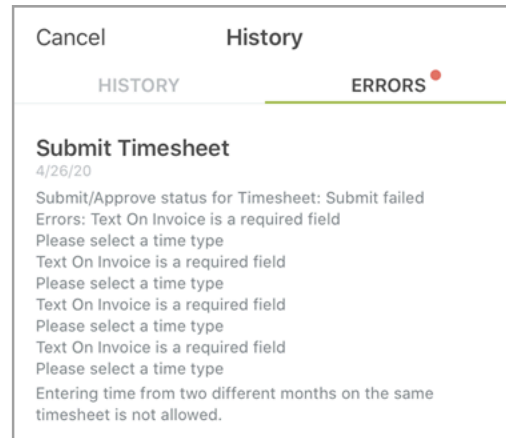
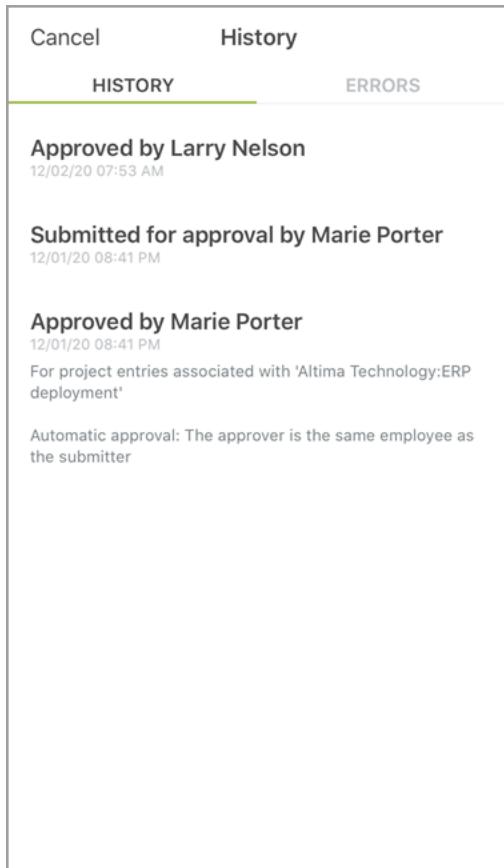
-    +

## Timesheet History and Timesheet Errors

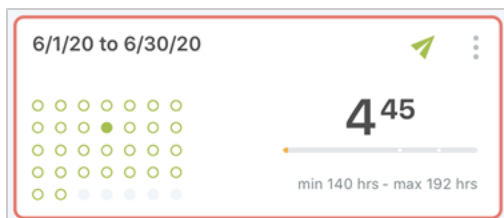
To view the history of a timesheet or any errors associated with a timesheet, go to that timesheet screen and tap the history icon  in the timesheet toolbar. On **iPhone**, the history icon shows a red dot  if there are any errors.

The history screen shows the submission and approval history of your timesheet. On **iPhone**, the history screen shows the History and Errors tabs. The Errors tabs lists warnings or errors, if any, preventing your timesheet from being submitted or preventing your OpenAir Mobile timesheet data from being synchronized with the OpenAir server data. To close the history screen and return to the timesheet, tap **Cancel (iPhone)** or the back arrow icon .

**(Android).**



On **iPhone**, the timesheet summary is highlighted with a red color outline on the list if there are any warnings or errors associated with a timesheet.



## Creating a Timesheet

You can use OpenAir Mobile to:



- Create a new timesheet from blank — See [Creating a New Timesheet From Blank](#).
- Create a new timesheet from an existing timesheet — See [Copying an Existing Timesheet](#).

**Note:** Depending on your company's OpenAir account configuration, OpenAir may split the new timesheet automatically into two linked timesheets if the timesheet period includes a month end. See [Linked Split-Week Timesheets](#).

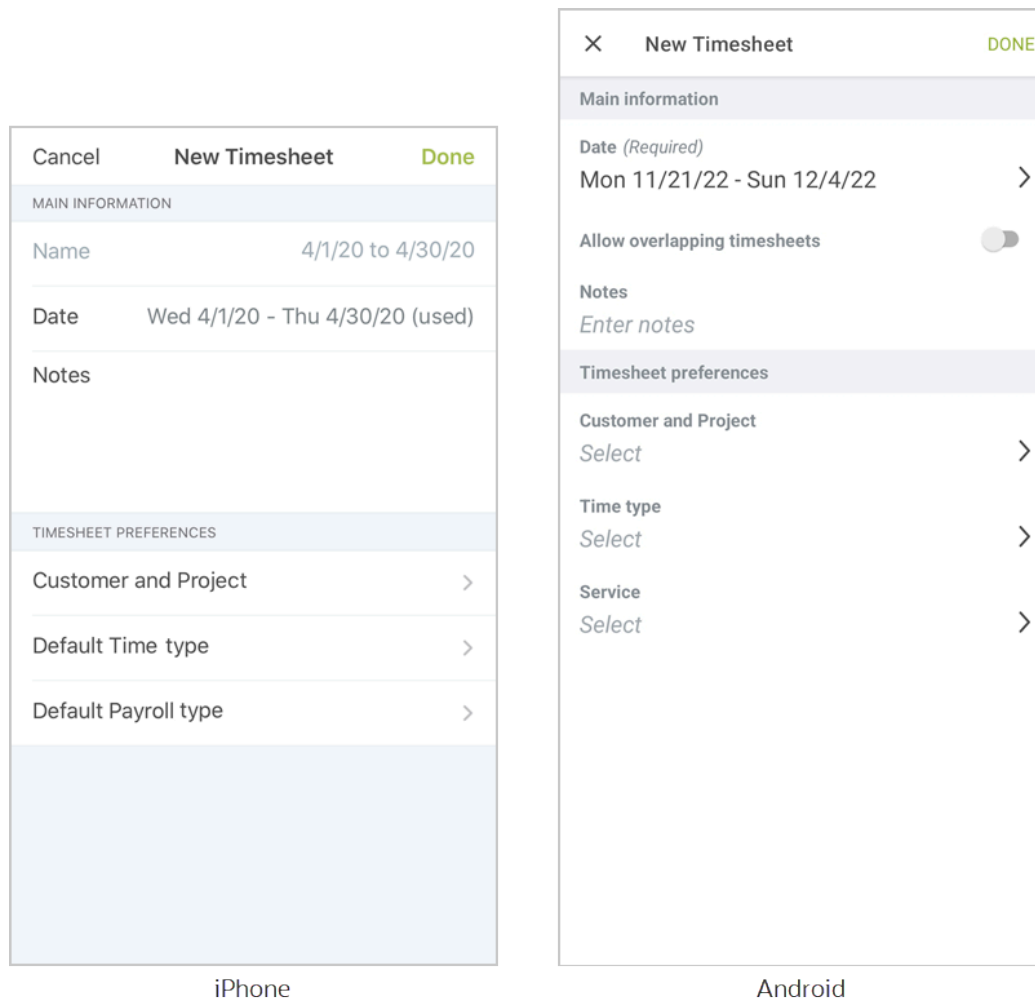
After the timesheet is created you can change the timesheet information and add or modify time entries at any time before you submit the timesheet for approval.

## Creating a New Timesheet From Blank

### To create a new timesheet from blank:

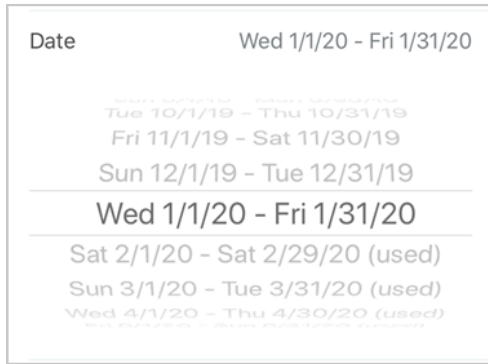
- Do one of the following:
  - Tap and hold the icon for the OpenAir Mobile app on the home screen of your device, then tap the shortcut **New timesheet**. See [Quick Actions from Home Screen](#).
  - On the OpenAir Mobile dashboard, tap the **Create Timesheet** widget or the **Create** widget and then Timesheet. See [Navigating OpenAir Mobile](#).
  - On the Open Timesheets list, tap the add icon  in the toolbar (**iPhone**) or the add button  (**Android**). See [Timesheets Lists in OpenAir Mobile](#).

The New Timesheet form appears.

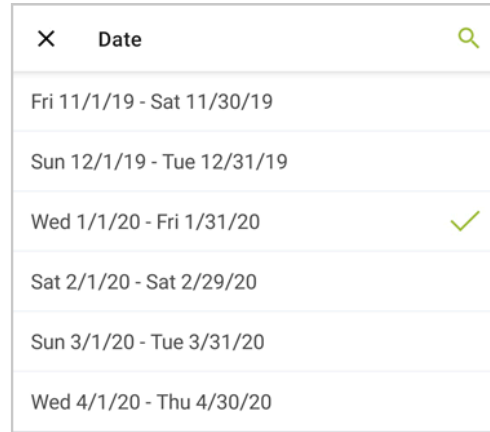


The image displays two side-by-side screenshots of the 'New Timesheet' form. The left screenshot is for an iPhone, showing a scrollable form with a 'Cancel' button on the left and a 'Done' button on the right. The form is divided into two main sections: 'MAIN INFORMATION' and 'TIMESHEET PREFERENCES'. Under 'MAIN INFORMATION', there are fields for 'Name' (with the value '4/1/20 to 4/30/20'), 'Date' (with the value 'Wed 4/1/20 - Thu 4/30/20 (used)'), and 'Notes'. Under 'TIMESHEET PREFERENCES', there are three rows: 'Customer and Project', 'Default Time type', and 'Default Payroll type', each with a right-pointing chevron. The right screenshot is for an Android device, showing a similar form but with a 'DONE' button in the top right corner. It also has a close button (X) in the top left. The 'Main information' section includes 'Date (Required)' (with the value 'Mon 11/21/22 - Sun 12/4/22'), 'Allow overlapping timesheets' (with a toggle switch), and 'Notes' (with the text 'Enter notes'). The 'Timesheet preferences' section includes 'Customer and Project', 'Time type', and 'Service', each with a 'Select' label and a right-pointing chevron.


- Tap **Date** then do one of the following:
  - On **iPhone**, scroll the options and select the timesheet period. The current selection shows in the middle of the scroller. Tap **Date** again to validate your selection and close the scroller.
  - On **Android**, the Date screen appears. Tap the period corresponding to the timesheet you want to create and return to the timesheet.

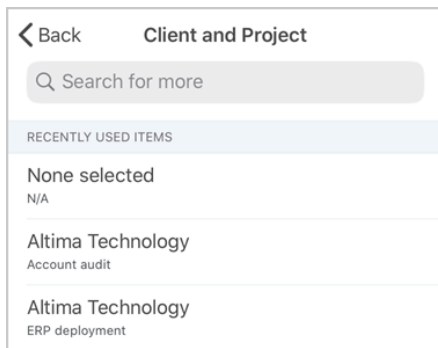


iPhone

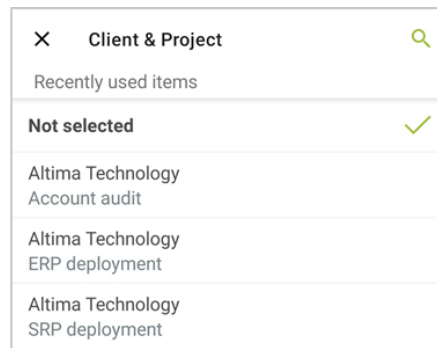


Android

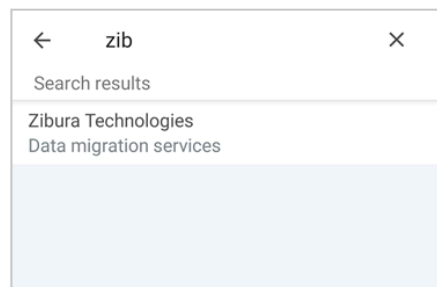
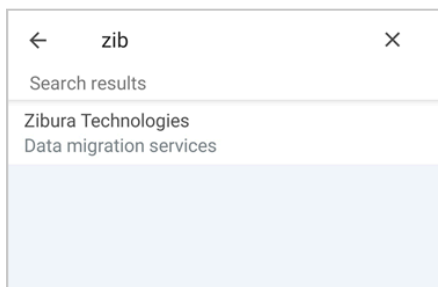
3. Tap **Notes** and enter any notes if required.
4. Properties under Timesheet Preferences depend on your company's OpenAir account configuration and let you set default values to use when adding new time cards or time entries.
  - For example, tap **Customer and Project**. The Customer:Project selection screen appears. Tap an option in the recently used items list to select it and return to the New Timesheet form. Alternatively, you can type a few characters in the search bar to show matching customer and project entries and tap an option in the search results to select it and return to the New Timesheet form. On **Android**, tap the search icon  to show the search bar.



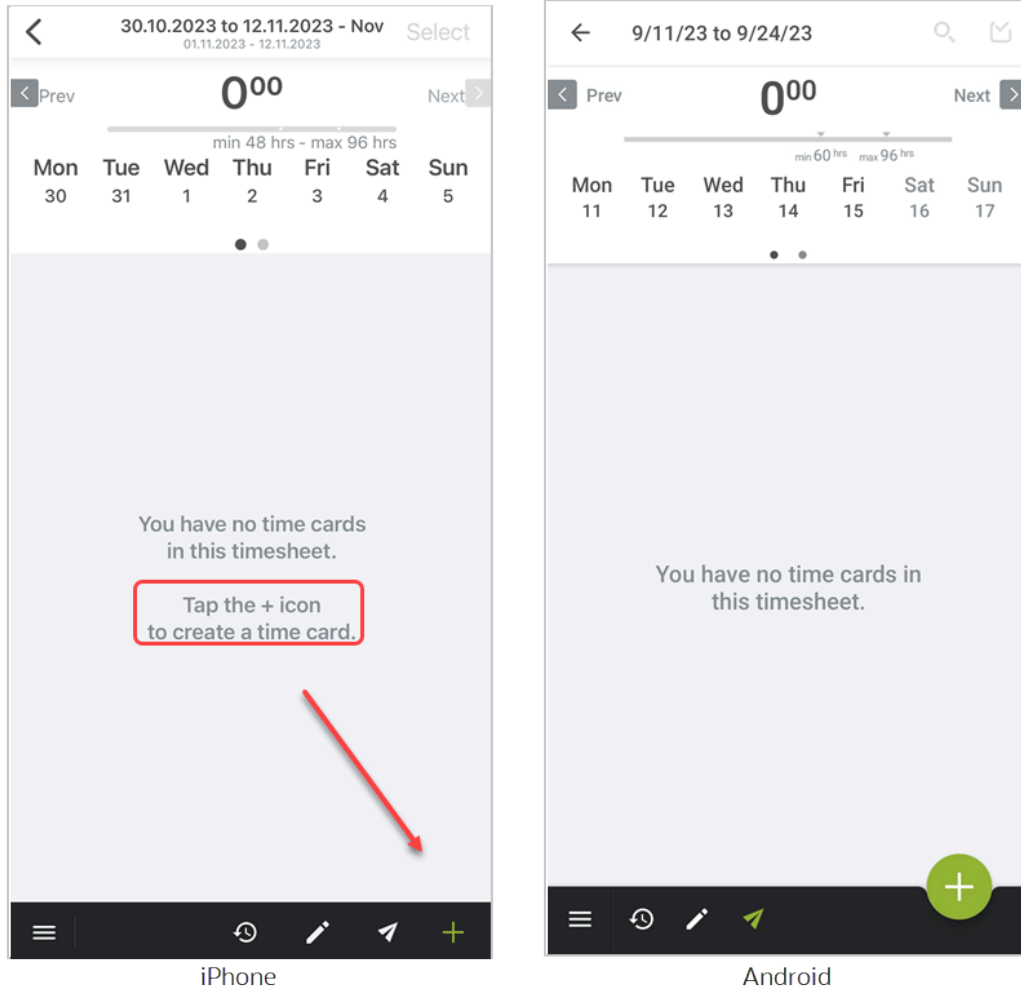
iPhone



Android



5. Tap **Done** to save the timesheet properties and open the new timesheet. You can now add time cards to the timesheet, following the on-screen instructions, before you add time entries. See [Adding a Time Card to a Timesheet](#).



## Copying an Existing Timesheet

You can create a new timesheet from any of your existing timesheets which you can view using OpenAir Mobile.

**Note:** The Approved timesheets list only lists up to 10 most recent approved timesheets covering periods within the last two years to date.

You may be able to populate time entries automatically in the new timesheet, depending on the timesheet period setting for your company's OpenAir account. This can speed up time entry when you have similar work patterns from one timesheet period to the other. To populate time entry cells automatically in the new timesheet, use the appropriate **Time entries settings** when copying the timesheet.




- If you copy an existing timesheet and the timesheet period is daily, weekly or bi-weekly you can select one of the following **Time entries settings** options:
  - Copy all time entries — The time entries will be exactly the same as in the existing timesheet.
  - Copy all and set time to 1 hour — The recorded time will be changed to 1 hour for all copied time entries.

- Copy all and set time to 8 hours — The recorded time will be changed to 8 hours for all copied time entries.
- Clear all time entries — All time entry cells will be empty.

**Note:** Depending on your company's OpenAir account configuration, you may not be able to populate time entry cells automatically in the timesheet copy if the period covered by the timesheet copy includes part of two different calendar months. See [Linked Split-Week Timesheets](#).

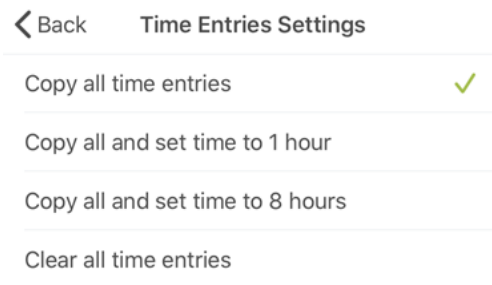
- “Clear all time entries” is currently the only supported **Time entries settings** option if the timesheet period is semi-monthly or monthly.

### To create a new timesheet from an existing timesheet:


1. Do one of the following:
  - On the Open Timesheets list, tap the clone icon  in the toolbar then tap the timesheet you want to copy from the Clone Timesheet selection screen. See [Timesheets Lists in OpenAir Mobile](#).
  - On any timesheets list containing the timesheet you want to copy, tap the clone icon  in the timesheet summary, or tap the more icon  then tap **Clone timesheet** in the context menu. See [Timesheet Summary in Lists](#).

The Clone Timesheet properties screen appears.

2. The Clone Timesheet screen is similar to the New Timesheet screen with the added Copy Settings section. See [Creating a New Timesheet From Blank](#).
  - a. Tap **Time entries settings** then tap one of the available options.



**Note:** OpenAir Mobile currently supports **Time entries settings** option when cloning daily, weekly or bi-weekly timesheets. If your company's OpenAir account is configured to use monthly or semi-monthly timesheet periods, “Clear all time entries” is the only available option.

- b. (Optional) To change any Main Information or Timesheet Preference settings, tap the setting and select an option. Note the current setting value is indicated with a green check mark  in the option selection screen.
3. Tap **Done** to create and open the new timesheet. You can add or edit time cards and time entries. See [Adding a Time Card to a Timesheet](#), [Editing Time Card Properties](#) and [Adding or Editing Time Entries](#).

## Linked Split-Week Timesheets

Depending on your company's OpenAir account configuration, OpenAir may split the new timesheet automatically into two linked timesheets if the timesheet covers a split one-week or two-week period. The term "split week" refers to a week split across two months — part of the week includes days up to the month end and the other part week includes the first days of the following month. For example, a timesheet created for the split week Monday March 30 to Sunday April 5 would result in two linked timesheets for Monday March 30 to Tuesday March 31 and Wednesday April 1 to Sunday April 5.

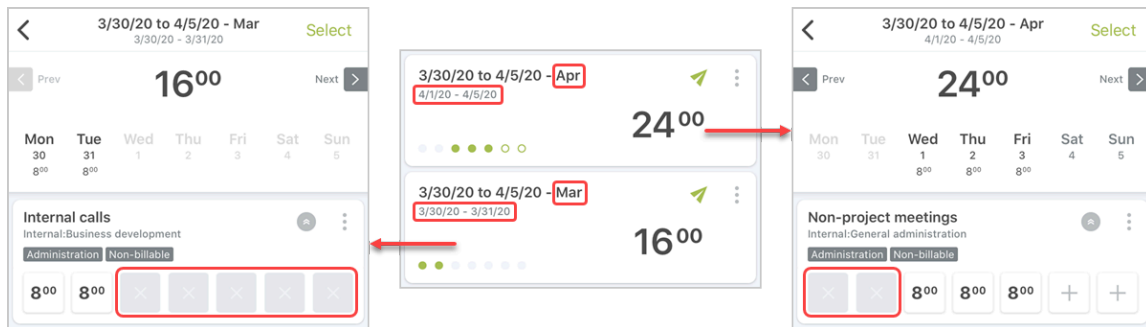
OpenAir creates two linked timesheets automatically when all the following conditions are met:

- The timesheet period for your company's OpenAir account is set to weekly or bi-weekly.
- Your company's OpenAir account is configured to split timesheets automatically into two linked timesheets at month end.
- You create a timesheet for a split one-week or two-week period (a period including a month change).

**Note:** If your company's OpenAir account is not configured to split timesheets automatically at month end, you can create two overlapping timesheets to create two separate timesheets for periods either side of month end.

If your company's OpenAir account is configured to split timesheets automatically at month end, you cannot currently use the Clone timesheet functionality to populate time entries automatically if the period of the new timesheet includes a month end. See [Copying an Existing Timesheet](#).

When creating linked split-week timesheets, OpenAir appends the month to the timesheet name. For example, "03/30/2020 to 04/05/2020 — Mar" for the part-week in March and " 03/30/2020 to 04/05/2020 — Apr" for the part-week in April. The timesheet summary and the timesheet headers show the start and end date of the part-period covered by each timesheet. Note that the time entry cells for the days falling in the other calendar month are disabled.




## Editing Timesheet Properties

You can edit the properties of an open or rejected timesheet at any time before you submit it for approval.


### To edit the properties of a timesheet:

1. Do one of the following:
  - On the Open or Rejected Timesheets list, tap the more icon in the timesheet summary then tap **Edit Timesheet** in the context menu. See [Timesheet Summary in Lists](#).




- On the timesheet screen, tap the edit icon  in the toolbar or timesheet header. See [Timesheets in OpenAir Mobile](#).

The Edit Timesheet screen appears. It is similar to the New Timesheet screen — see [Creating a New Timesheet From Blank](#).

**Note:** You can only edit the properties of open or rejected timesheets. Tapping the edit icon  for any other timesheets shows the timesheet properties but does not let you edit the properties.

On **iPhone**, you cannot edit the properties if your device is offline and the timesheet summary shows a “To sync” tag because there is a Submit or Delete action pending for the timesheet.

In both cases, only the clone timesheet action is available from the timesheet summary in the list.

2. To change any Main Information or Timesheet Preference settings, tap the setting and select an option. Note the current setting value is indicated with a green check mark  in the option selection screen.
3. Tap **Done** to save the changes and return to the list or timesheet.

## Deleting Timesheets

You can delete open or rejected timesheets at any time before you submit them for approval.

- You can delete timesheets one at a time. See [Deleting a Timesheet](#).
- You can delete multiple timesheets at the same time using the bulk-action mode. See [Deleting Multiple Timesheets at the Same Time](#).

You cannot delete a timesheet if your device is offline and the timesheet summary shows a “To sync” tag because there is already a Submit or Delete action pending for this timesheet.

**Note:** Depending on your company's OpenAir account configuration, OpenAir may split the new timesheet automatically into two linked timesheets if the timesheet period includes a month end. See [Linked Split-Week Timesheets](#).

You can delete only one of the linked split-week timesheets or delete both one after the other.

You can also delete time cards and time entries if it is more appropriate. See [Deleting a Time Card](#) and [Deleting Time Entries](#).

## Deleting a Timesheet

You can delete timesheets one at a time.

### To delete a timesheet:

1. On the Open or Rejected Timesheets list, tap the more icon  in the timesheet summary then tap **Delete Timesheet** in the context menu. See [Timesheet Summary in Lists](#).

A confirmation dialog appears.

**Note:** You cannot delete a timesheet if your device is offline and the timesheet summary shows a “To sync” tag because there is already a Submit or Delete action pending for this timesheet. If this is the case, only the clone timesheet action is available from the timesheet summary.



2. Tap **Delete** to delete the timesheet and return to the list.

**Important:** If you delete a timesheet, all time cards and time entries in the timesheet will be deleted.

## Deleting Multiple Timesheets at the Same Time

You can delete multiple timesheets at the same time using the bulk-action mode.

### To delete multiple timesheets at the same time:

1. On the Open or Rejected Timesheets list, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Bulk Actions in Timesheets Lists](#).
2. To select the timesheets you want to delete, tap each timesheet summary one after the other. You can tap any selected timesheets again to unselect them.
3. Tap the delete icon  in the list toolbar. A confirmation dialog appears.

**Note:** You cannot delete the timesheets if your device is offline and one of the selected timesheet summaries shows a “To sync” tag because there is already a Submit or Delete action pending for this timesheet. If this is the case, the delete action is disabled.

4. Tap **Delete** to delete the selected timesheets and return to the list.

**Important:** If you delete a timesheet, all time cards and time entries in the timesheet will be deleted.

## Adding a Time Card to a Timesheet

You must add a time card to a timesheet before you can add time entries. Time cards are subdivision of timesheets. You can use time cards to keep your time entries organized. Each time card is associated to a specific project or task. See [Time Cards](#).

You can either add a completely new time card or add a copy of an existing time card:

- Add a new times card from blank — See [Adding a New Time Card](#).
- Add a new time card from an existing time card in the timesheet — See [Copying an Existing Time Card](#).

After the time card is created you can change the time card information and add or modify time entries at any time before you submit the timesheet for approval.

You cannot add a time card to a timesheet if your device is offline and there is a Submit or Delete action pending for this timesheet.

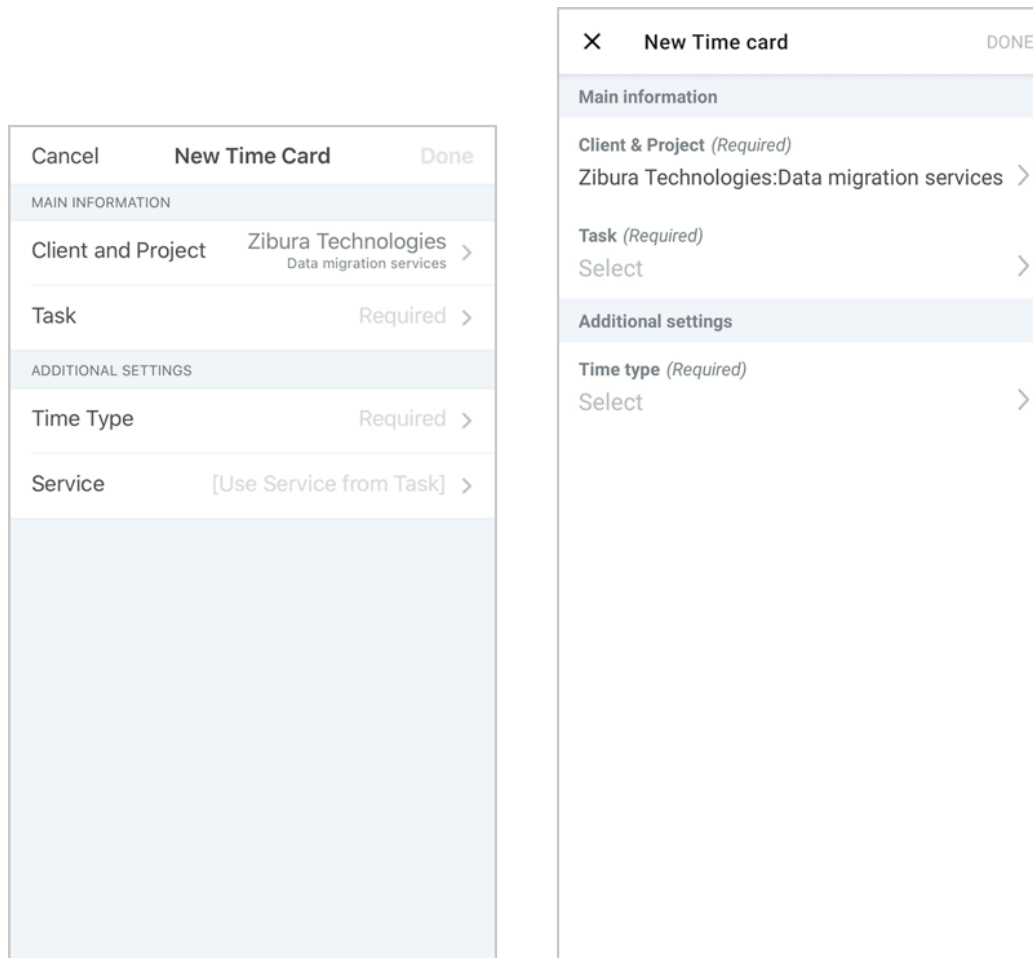
## Adding a New Time Card

You must add a time card to a timesheet before you can add time entries.

### To add a new time card:

1. On the timesheet screen, tap the add icon  in the toolbar (**iPhone**) or the add button  (**Android**). See [Timesheets in OpenAir Mobile](#).

The New Time Card form appears.



iPhone

Android

2. Tap a property in the New Time Card form to view the available options, then tap an option to select it and return to the New Time Card form. Repeat for all required time card properties.
  - Properties listed on the form depend on your company's OpenAir account configuration.
  - Required properties are indicated on the form. Whether a property is optional or required depends on your company's OpenAir account configuration. On **iPhone**, the dynamic value shows in light gray if a property is set to be populated automatically. For example, your

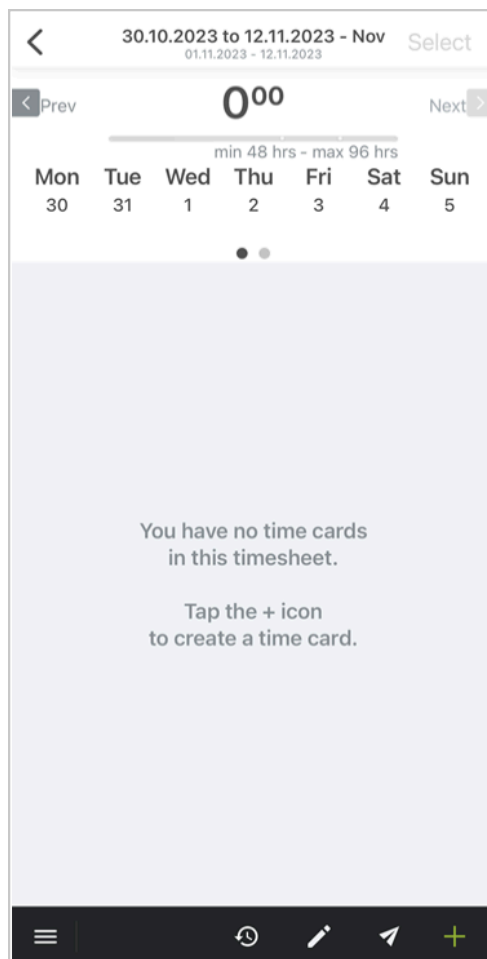
company's OpenAir account may be set to use the service (or category) associated with the selected task.

- If you defined some default values under Timesheet Preferences in the timesheet properties, the corresponding time card properties are pre-filled.

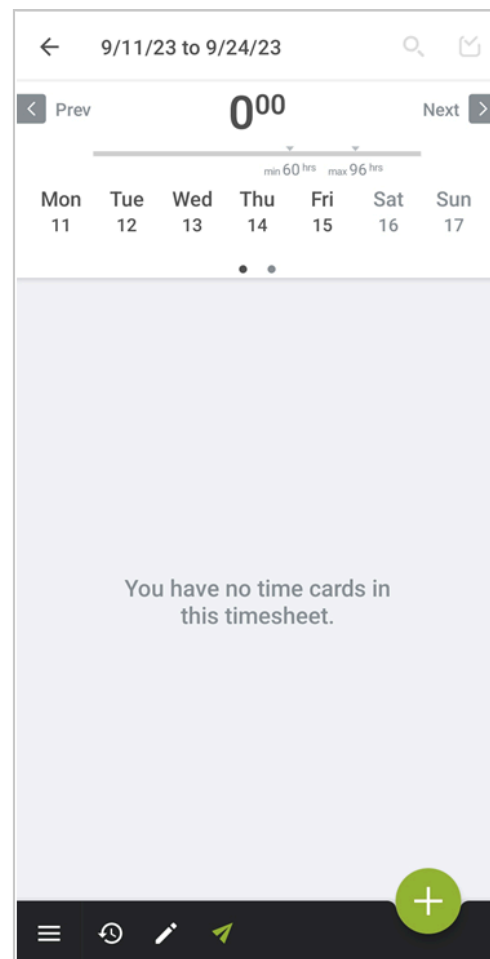
There are two categories of properties:

- Main information — includes **Customer and Project** and **Task**.
  - Additional settings — can include **Time type**, **Service** (or Category), **Payroll type**.
3. Tap **Done** to save the time card properties and return to the timesheet. You can now add time entries to the time card. See [Adding or Editing Time Entries](#).

**Note:** There cannot be two time cards with exactly the same properties (main information and additional settings) on the same timesheet. If the properties are the same as an existing time card, the new time card will not be added. When you tap **Done**, the timesheet will show the existing time card with the same properties.



iPhone




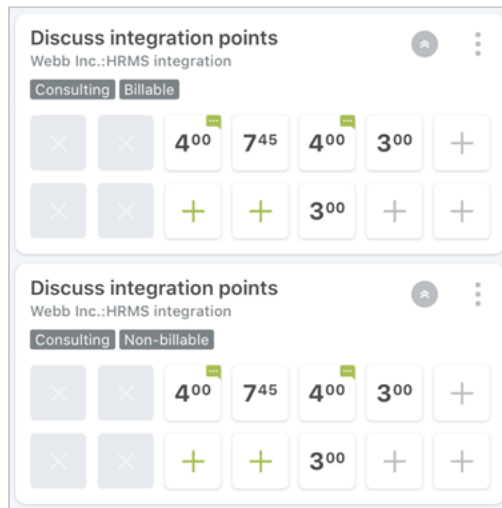
Android


## Copying an Existing Time Card

You can copy an existing time card if you want to add a time card with similar information details or time entries. All the time entries from the existing time card will be copied across to the new time card.

## To create a new time card from an existing time card on the timesheet:

1. On the timesheet screen, tap the more icon  on the time card you want to copy then tap **Clone time card** in the context menu. See [Time Cards](#).  
The Edit Time Card screen appears.
2. The Edit Time Card screen is similar to the New Time Card screen. Change any of the main information details or additional settings. See [Editing Time Card Properties](#) and [Adding a New Time Card](#).
3. Tap **Done** to save the properties, create the new time card and return to the timesheet. The new time card shows exactly the same time entries as the time card you copied. You can now edit the time entries. See [Adding or Editing Time Entries](#).





- Note:** There cannot be two time cards with the same properties (main information and additional settings) on the same timesheet.
- If the properties are the same as those of the time card you copied, the new time card will not be added. When you tap **Done**, the timesheet will show the existing time card unchanged.
  - If the properties are the same as those of another existing time card and you tap **Done**, a message appears. Tap **Merge** to merge the two time cards — all time entries on the time card you are creating will be transferred onto the existing time card. Tap **Cancel** (iPhone) or the cancel icon  (Android) to return to Edit Time Card screen.



## Editing Time Card Properties

You can edit the properties of a time card in a timesheet at any time before you submit the timesheet for approval.

You cannot edit the properties of a time card if your device is offline and there is a Submit or Delete action pending for the timesheet.

## To edit the properties of a time card:

1. On the timesheet screen, tap the more icon  on the time card you want to edit, then tap **Edit time card** in the context menu. See [Time Cards](#).  
The Edit Time Card screen appears. It is similar to the New Time Card screen — see [Adding a New Time Card](#).
2. To change any Main Information or Additional Settings, tap the setting and select an option. Note the current setting value is indicated with a green check mark  in the option selection screen.
3. Tap **Done** to save the changes and return to timesheet.

 **Note:** There cannot be two time cards with the same properties (main information and additional settings) on the same timesheet. If the properties are the same as those of an existing time card and you tap **Done** a message appears. Tap **Merge** to merge the two time cards — all time entries on the time card you are creating will be transferred onto the existing time card. Tap **Cancel (iPhone)** or the cancel icon  (**Android**) to return to Edit Time Card screen.


## Deleting a Time Card


You can delete a time card from a timesheet at any time before you submit the timesheet for approval.

You can also delete time entries or entire timesheets if it is more appropriate. See [Deleting Time Entries](#) and [Deleting Timesheets](#).

You cannot delete a time card if your device is offline and there is a Submit or Delete action pending for the timesheet.

### To delete a time card:

1. On the timesheet screen, tap the more icon  on the time card you want to delete then tap **Delete time card** in the context menu. See [Time Cards](#).  
A confirmation dialog appears.
2. Tap **Delete** to delete the time card and return to the timesheet.

 **Important:** If you delete a time card, all time entries in the time card will be deleted.

## Adding or Editing Time Entries

After you have created a timesheet and added at least one time card, you can add time entries or modify existing time entries at any time before you submit the timesheet for approval.

- You can add or modify time entries one at a time using the normal edit mode. See [Adding or Modifying a Single Time Entry](#).
- You can add or modify multiple time entries at the same time using the bulk-edit mode. See [Adding or Modifying Multiple Time Entries at the Same Time](#).
- You can split the time entered in the same time card and for the same day over multiple time entry cells by adding time card rows. See [Adding a Time Card Row](#).


You cannot add or edit time entries if your device is offline and there is a Submit or Delete action pending for the timesheet.

## Adding or Modifying a Single Time Entry

You can add or modify time entries one at a time using the normal edit mode.


### To add or modify a single time entry:

1. On the timesheet screen, tap the time entry cell for the time entry you want to add or edit. See [Timesheets in OpenAir Mobile](#).
2. The time entry form appears in the bottom part of the screen. The time entry cell you are editing is highlighted with a solid green color background in the timesheet.

 **Note:** If your timesheet period covers more than one week, swipe the calendar right or left to view the relevant week.

3. Use the time entry form to record your time or to change the recorded time and to add or to change any notes or other details. See [Using the Time Entry Form and Time Picker](#).
4. To save the time entry and return to the timesheet, tap **Done** or tap another time entry cell.

You must resolve any errors on the time entry form before you can save and close the time entry form:

- The **Done** link is disabled and appears in gray color if there are any errors on the form.
- The time entry cell you are editing is highlighted with a red color background if additional information is required in the **Details** tab.
- The tabs containing errors are indicated by a red color dot  next to the tab title.


## Using the Time Entry Form and Time Picker

The time entry form lets you add or change time values using an intuitive time picker and lets you add notes and other details to your time entries. You can clear time entries or discard all changes made at any time when using the time entry form.

You can choose between two time entry methods: Selecting a start time and end time or entering a duration time entry method. For more information, see [Time Entry Form and Time Picker](#).

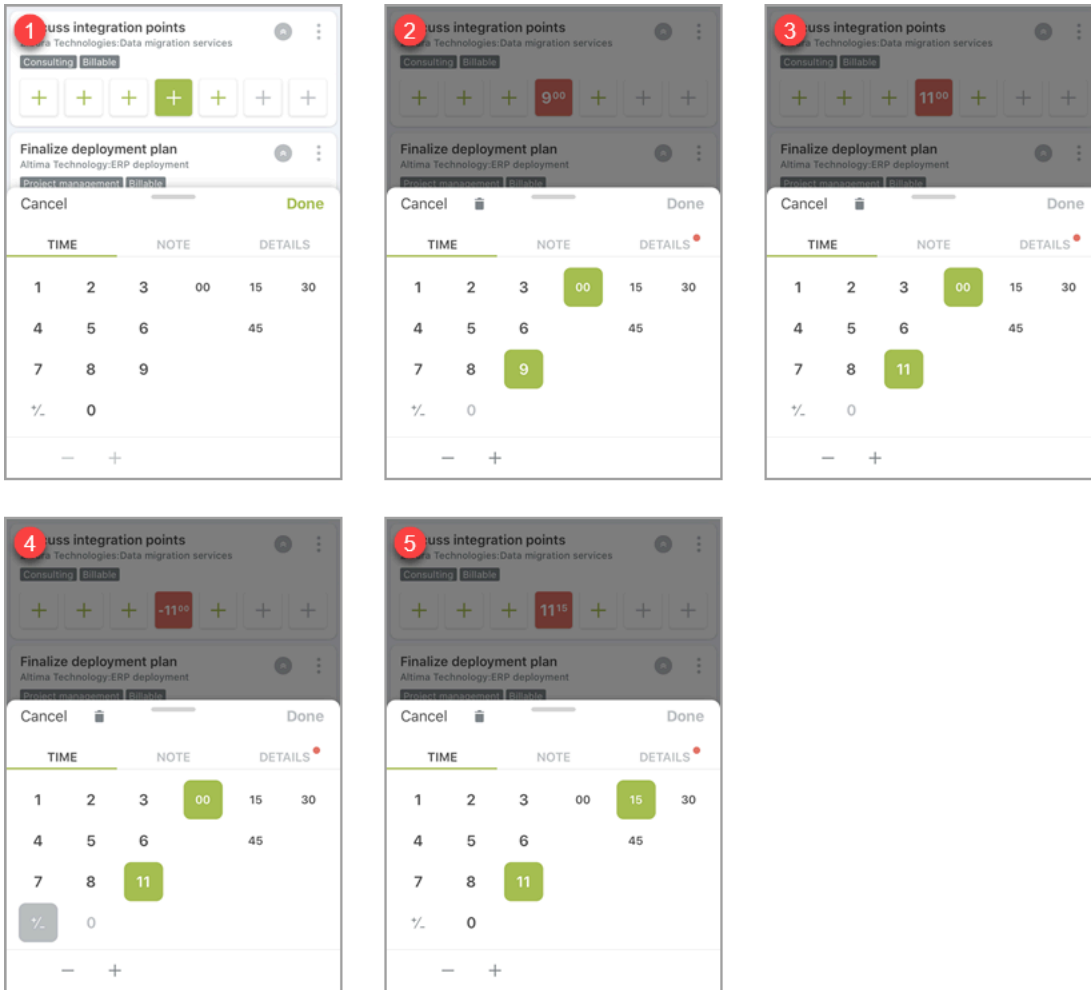
### To add or modify a duration value:

1. Depending on your time entry preferences, choose Duration or change your preferred time entry method. See [Time Entry](#).

 **Note:** The time entry form shows the time picker by default when it appears after you tap a time entry cell.

2. In the time entry form, tap **Time** to view the time picker.
3. Tap the number of hours on the left side. The available options let you pick numbers between 0 and 9 in a single tap.

4. If you need to set a time value of 10 hours or over, tap the add icon + to increase the number of hours by one hour, and tap again until you reach the number required.  
If you need to decrease the number of hours, tap the subtract icon — until you reach the number required.
5. To enter a negative value, tap the positive/negative icon +/-.
6. Tap the number of minutes from the options available on the right side. The possible values for the number of minutes are determined by your company's OpenAir account configuration.



**To add or modify a start time and end time:**

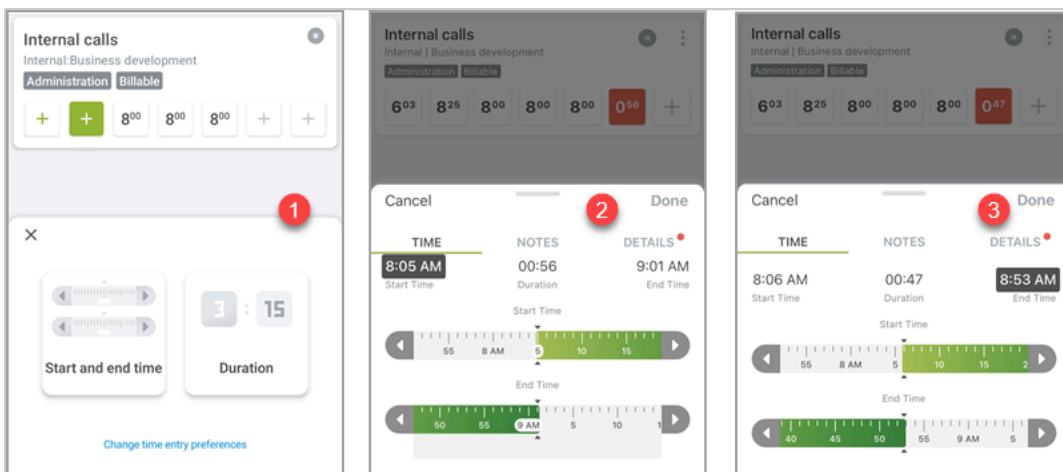
1. Depending on your time entry preferences, choose Duration or change your preferred time entry method. See [Time Entry](#).
2. In the time entry form, tap **Time** to view the time picker.

**Note:** The time entry form shows the time picker by default when it appears after you tap a time entry cell.

3. Flick the **Start Time** slider left or right and set the start time. Use the left and right arrow for better precision, if necessary. If you did not change the end time before changing the start time, the end time changes with the start time to match the default duration. Otherwise the duration changes with the start time.



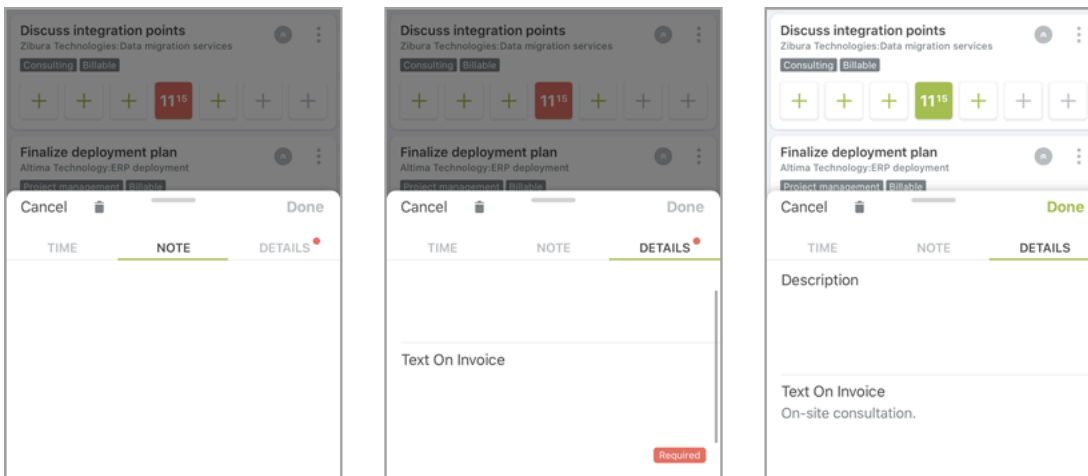
4. Flick the **End Time** slider left or right and set the end time. Use the left and right arrow for better precision, if necessary. The duration changes as you change the end time.




### To add or modify time entry notes and other details:

1. In the time entry form, tap **Notes** to view the Notes tab.
2. Tap the space under Note to show the touchscreen keyboard and enter any notes related to the selected time entry or time entries.
3. In the time entry form, tap **Details** to view the Details tab.
4. On **iPhone**, swipe up to scroll the form or drag the bar — up to expand the time entry form. On **Android**, drag anywhere on time entry form up to expand it. All required fields on the form show a red color "Required" tag (**iPhone**) or show the text "(Required)" in the field label. See [Time Entry Bulk Edit](#).
5. Tap the space under a field label to show the touchscreen keyboard and enter the information.



**Note:** Additional details may be required when adding time entries, depending on your company's OpenAir account configuration. You need to enter all the required details to save the changes and return to the timesheet. After you have added all the required details, the time entry cells are highlighted in a green color instead of red.



### To clear all time entry information:

1. In the time entry form, tap the delete icon .
2. Depending on whether you are using the time entry form in normal or bulk-edit mode:
  - If you are adding or editing a single time entry cell in normal mode, a confirmation dialog appears. Tap **Delete** to clear the selected time entry cell and return to the timesheet.
  - If you are adding or editing time entries in bulk-edit mode, all time entry information in the selected cells is cleared but the time entry form remains open. You can continue editing the selected time entry cells.


### To discard the changes made:

1. Depending on whether you are using the time entry form in normal or bulk-edit mode:
  - If you are adding or editing a single time entry cell in normal mode, tap **Cancel (iPhone)** or the cancel icon  (**Android**) in the time entry form.
  - If you are adding or editing time entries in bulk-edit mode, tap **Cancel (iPhone)** or the cancel icon  (**Android**) in the top left corner of the timesheet screen.
2. Tap **Discard** in the confirmation dialog to exit the time entry form or the bulk-edit mode and return to the timesheet.


## Adding or Modifying Multiple Time Entries at the Same Time


You can add or modify multiple time entries across multiple time card rows, multiple time cards and multiple weeks at the same time using the bulk-edit mode. See also [Time Entry Bulk Edit](#).

### To add or modify multiple time entries at the same time:

1. On the timesheet screen, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Timesheets in OpenAir Mobile](#).
2. To select the time entries you want to add or change, tap each empty time entry cell one after the other. You can tap any selected time entry cells again to unselect them.

The time entry form appears in the bottom part of the screen as soon as you select the first time entry cell. Selected time entry cells are highlighted with a green color outline in the time sheet.

 **Note:** Remember you can select time entry cells across multiple time card rows, multiple time cards, and if your timesheet period covers more than one week, multiple weeks. Swipe the calendar right or left to view the previous or next week

 **Tip:** You can select or unselect time entry cells at any time when adding or editing multiple time entries. This gives you the flexibility to add different information to different set of cells. For example, if you worked on the same project or task over a whole week with two full days and three half days, but all other information is the same for all time entries.

3. Use the time entry form to record your time or to change the recorded time and to add or to change any notes or other details. See [Using the Time Entry Form and Time Picker](#).

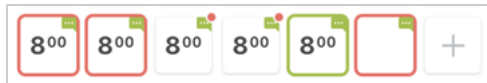
4. To save all the changes made, exit the bulk-edit mode and return to the timesheet, tap **Done** in the top right corner of the timesheet screen.

You must resolve any time entry errors before you can save your changes and return to the timesheet:

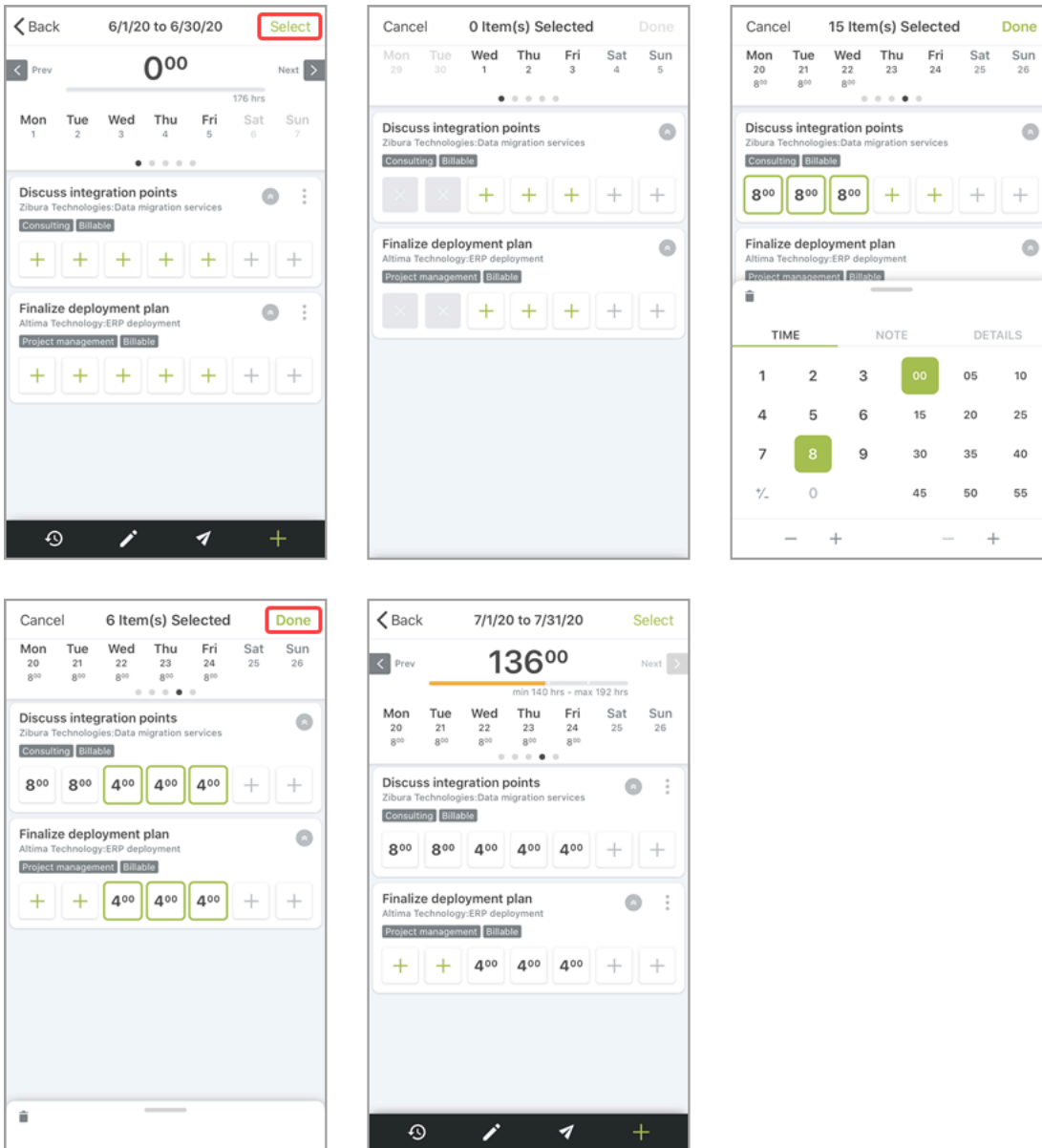
- The **Done** link is disabled and appears in gray color if there are any time entries with errors.
- Selected time entry cells with errors are highlighted with a solid red color outline.
- In the time entry form, the tabs containing errors for any of the selected time entry cells are indicated by a red color dot • next to the tab title.



- Modified time entry cells containing errors show a red color dot • in the top right corner of the cell, if they are not currently selected.



For example, imagine you added two time cards to the timesheet and want to enter time entries for the first three weeks of June with full 8 hours working days spent on one project. You select all 15 time entry cells, enter all details and set the time value to 8:00. Before saving the time entries, you realize the last three days were split between the two projects with 4 hours spent on each projects. You unselect the 12 time entry cells you do not want to edit and select the additional 3 time entry cells on the other time card, enter all details and set the time value to 4:00. In effect, you are editing three time entries and adding three time entries at the same time. Finally, tap **Done** to save all the changes made.



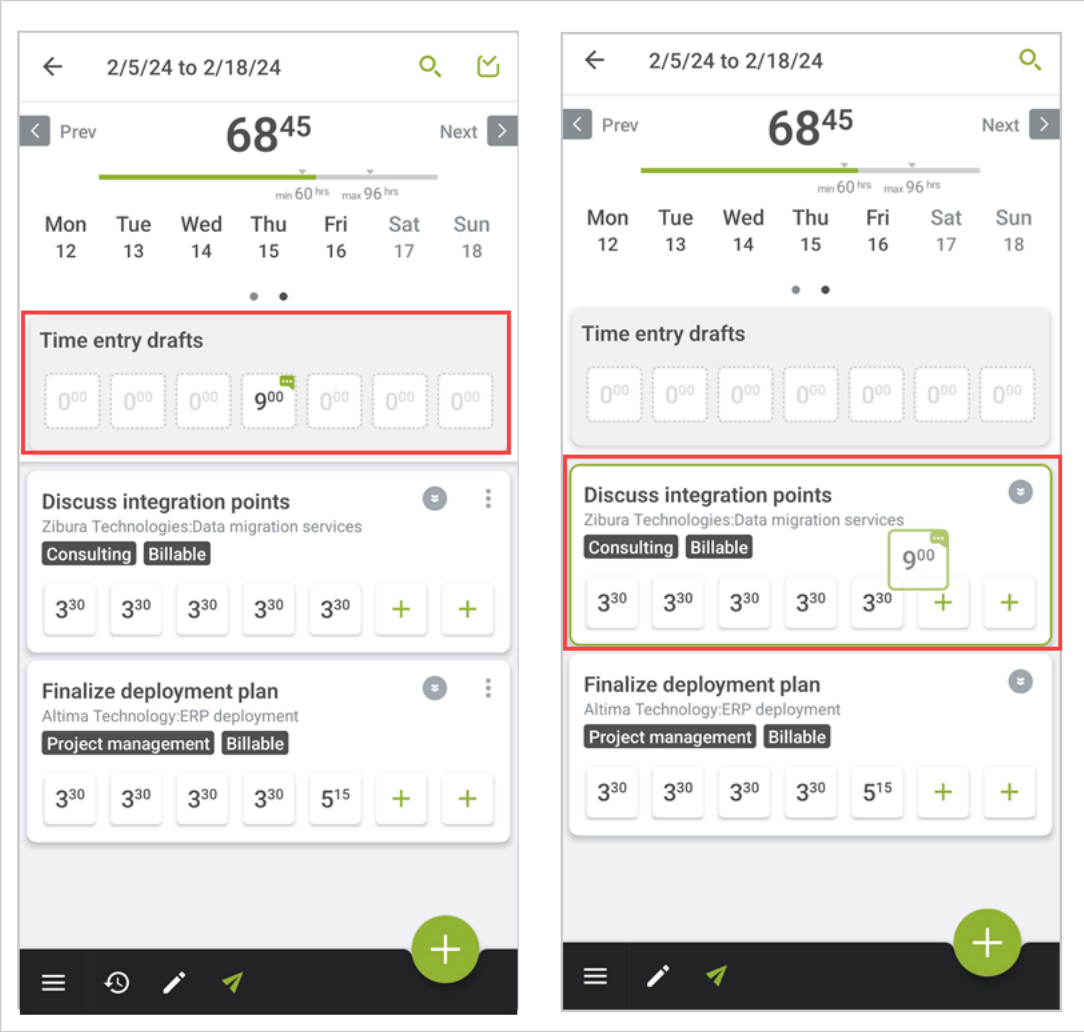
## Adding Time Entries from the Draft Inbox

You can move time entry drafts from your draft inbox to any time card in the an open or to approve timesheet. For more information, see [Working with Drafts in OpenAir Mobile](#).

### To add time entries from the draft inbox:

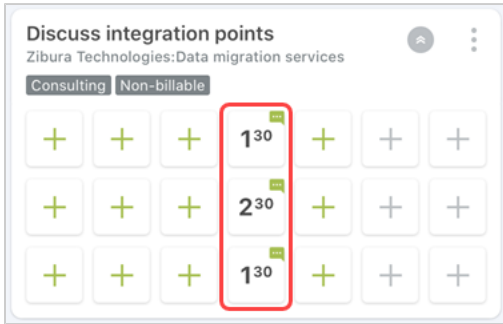
1. Select the open or rejected timesheet you want to add a time entry draft.
2. On the timesheet summary, tap the time entry draft.
3. Drag a draft time entry to a timecard.
4. Edit the time entry and resolve any time entry errors if necessary. For more information see, [Adding or Editing Time Entries](#).

**Note:** The time entry draft form is designed for quick information entry – it includes only the most important standard fields and ignores the usual standard and custom business rules for time entries in your company's OpenAir account. Time entry drafts may contain errors if your company requires specific information on time entries.



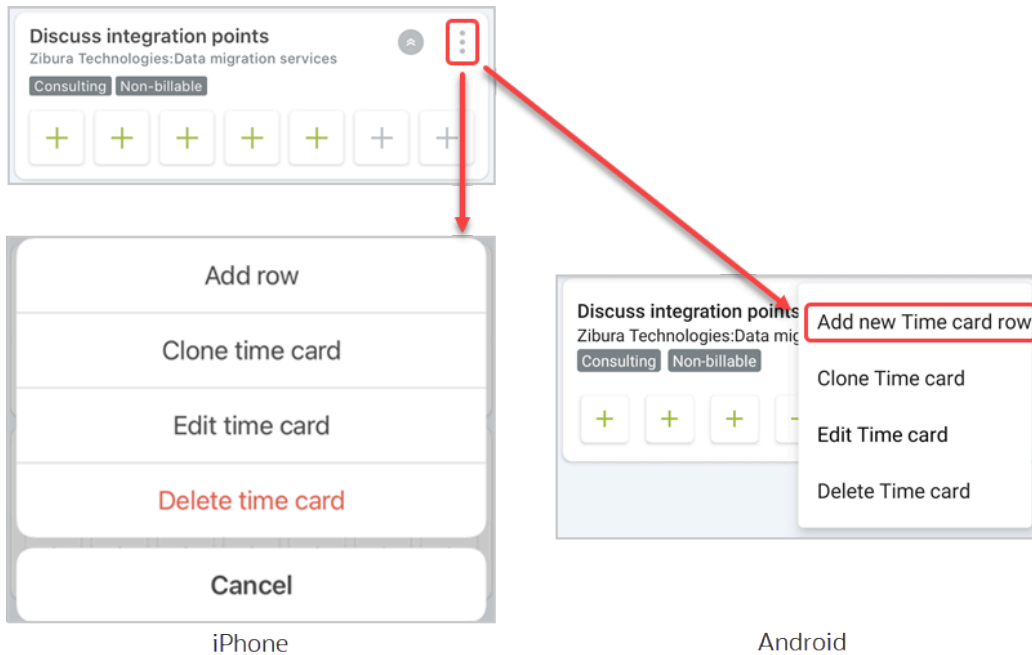
### Adding a Time Card Row

You can add multiple time card rows if you need to split the time entered for the same task or project and the same day over multiple time entry cells.



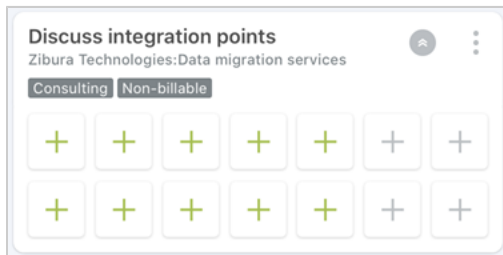
**To add a time card row:**

1. In the time card, tap the more icon . A context menu appears.

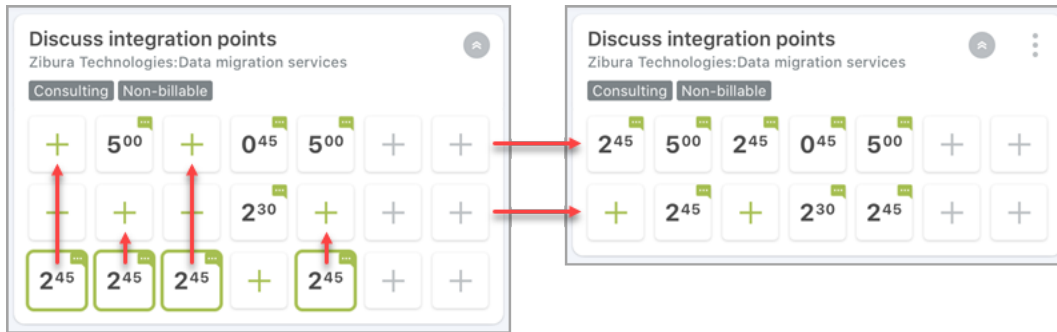


2. In the context menu, tap **Add row (iPhone)** or **Add new time card row (Android)**.

A new card row appears.



Time card rows are fluid. A time entry cell will automatically move to the row above if the time entry cell immediately above is empty. Empty time card rows will be deleted automatically if you close the timesheet and open it again.



## Deleting Time Entries

You can delete time entries at any time before you submit the timesheet for approval.


- You can delete time entries one at a time using the normal edit mode. See [Deleting a Single Time Entry](#).
- You can delete multiple time entries at the same time using the bulk-edit mode. See [Deleting Multiple Time Entries at the Same Time](#).
- You can also delete the entire time card or timesheet to delete all the time entries therein. See [Deleting a Time Card](#) and [Deleting Timesheets](#).

You cannot delete time entries if your device is offline and there is a Submit or Delete action pending for the timesheet.

### Deleting a Single Time Entry

You can delete time entries one at a time using the normal edit mode.


#### To delete a single time entry:

1. On the timesheet screen, tap the time entry you want to delete. The time entry form appears.
2. Tap the delete icon  on the time entry form. A confirmation dialog appears.
3. Tap **Delete** to delete the time entry and return to the timesheet.

### Deleting Multiple Time Entries at the Same Time


You can delete multiple time entries across multiple time cards and multiple weeks at the same time using the bulk-edit mode.

#### To delete multiple time entries at the same time:

1. On the timesheet screen, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner.
2. To select the time entries you want to delete, tap each time entry cell one after the other. You can tap any selected time entry cells again to unselect them.

The time entry form appears in the bottom part of the screen as soon as you select the first time entry cell. Selected time entry cells are highlighted with a green color outline in the time sheet.

**Note:** Remember you can select time entry cells across multiple time card rows, multiple time cards, and if your timesheet period covers more than one week, multiple weeks. Swipe the calendar right or left to view the previous or next week

3. Tap the delete icon  on the time entry form to clear all time entry information in the selected cells.
4. Tap **Done** in the top right corner of the timesheet screen to confirm deletion, exit the bulk-edit mode and return to the timesheet.

## Submitting Timesheets

After you have created a timesheet and added all time entries, you can submit the timesheet for approval. You can also re-submit any timesheets which you previously submitted for approval and were rejected by the approver(s).

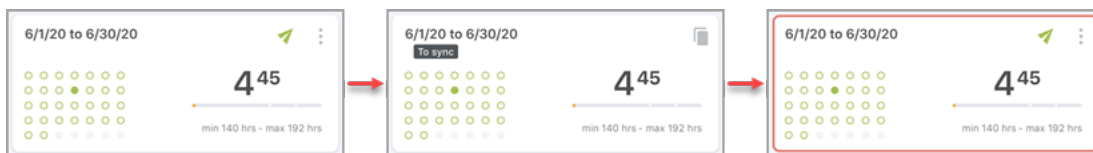
- You can submit timesheets for approval one at a time. See [Submitting a Timesheet](#).
- You can submit multiple timesheets for approval at the same time using the bulk-action mode. See [Submitting Multiple Timesheets at the Same Time](#).

You cannot submit a timesheet for approval if your device is offline and there is already a Submit or Delete action pending for the timesheet.

Depending on your company's OpenAir account configuration, you may not be able to submit a timesheet if there are no time entries in the timesheet.

After you submit a timesheet, OpenAir Mobile sends the submitted timesheet to OpenAir for validation. During this time, the timesheet may still appear in the list and the timesheet summary may show a "To sync" tag for a brief moment.

- If you submit the timesheet successfully, the timesheet disappears from the Open Timesheets list and is now listed on the Submitted Timesheet list.
- If there are errors preventing the timesheet from being submitted, the timesheet still appears in the Open Timesheets list and the timesheet summary is highlighted with a red color outline. See [Timesheet History and Timesheet Errors](#).





**Note:** After you submit a timesheet successfully, you cannot edit this timesheet. You can only edit a submitted timesheet after your approver rejects the timesheet. If this is the case, the timesheet is listed in the Rejected Timesheets list.

## Submitting a Timesheet

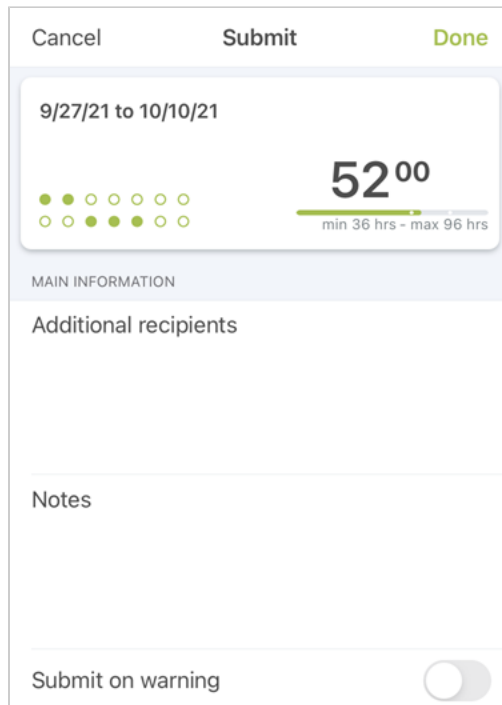
You can submit open or rejected timesheets one at a time from the Open Timesheets or Rejected Timesheets lists or from the timesheet screen.

**To submit a timesheet:**



1. Do one of the following:
  - On the Open Timesheets or Rejected Timesheets list, tap the submit icon  in the timesheet summary. See [Timesheets Lists in OpenAir Mobile](#).
  - On the timesheet screen, tap the submit icon  in the timesheet toolbar. See [Timesheets in OpenAir Mobile](#).

The Submit screen appears.



Cancel      Submit      Done

9/27/21 to 10/10/21


52<sup>00</sup>  
min 36 hrs - max 96 hrs

MAIN INFORMATION

Additional recipients

Notes

Submit on warning

 **Note:** Depending on your company's OpenAir account configuration, you may not be able to submit a timesheet if there are no time entries in the timesheet.

You cannot submit a timesheet if your device is offline and the timesheet summary shows a "To sync" tag because there is already a Submit or Delete action pending for this timesheet.



In both cases, the submit action is disabled or not available.

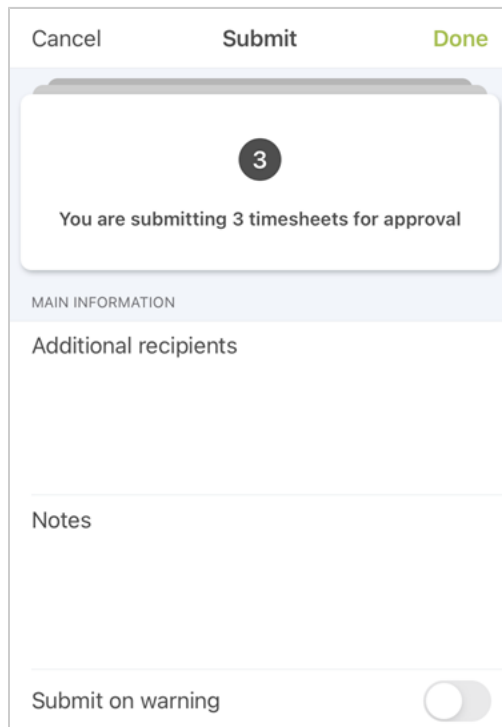
2. (Optional) To send a copy of the submitted timesheet notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
3. (Optional) To add notes for the attention of the approver, tap **Notes** on **iPhone** or **Android**, and enter some notes.
4. (Optional) To submit the timesheet even if the timesheet validation returns any warnings, tap the **Submit on warning** toggle. The toggle shows in grey when Off (default) and in green when On. By default, the timesheet is not submitted if the validation returns any warnings.
5. Tap **Done (iPhone)** or **Submit (Android)** to submit the timesheet and return to the list.

## Submitting Multiple Timesheets at the Same Time

You can submit multiple timesheets for approval at the same time using the bulk-action mode.

## To submit multiple timesheets at the same time:

1. On the Open Timesheets or Rejected Timesheets list, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Timesheets Lists in OpenAir Mobile](#).
2. To select the timesheets you want to submit, tap each timesheet summary one after the other. You can tap any selected timesheets again to unselect them.
3. Tap the submit icon  in the list toolbar. The Submit screen appears.



**Note:** Depending on your company's OpenAir account configuration, you may not be able to submit the timesheets if there are no time entries in one of the selected timesheets. You cannot submit the timesheets if your device is offline and one of the selected timesheet summaries shows a "To sync" tag because there is already a Submit or Delete action pending for this timesheet. In both cases, the submit action is disabled.

4. (Optional) To send a copy of the submitted timesheet notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
5. (Optional) To add notes for the attention of the approver, tap **Notes** on **iPhone** or **Android**, and enter some notes.
6. (Optional) To submit the selected timesheets even if the timesheet validation returns any warnings, tap the **Submit on warning** toggle. The toggle shows in grey when Off (default) and in green when On. By default, the timesheet is not submitted if the validation returns any warnings.
7. Tap **Done (iPhone)** or **Submit (Android)** to submit the selected timesheets and return to the list.

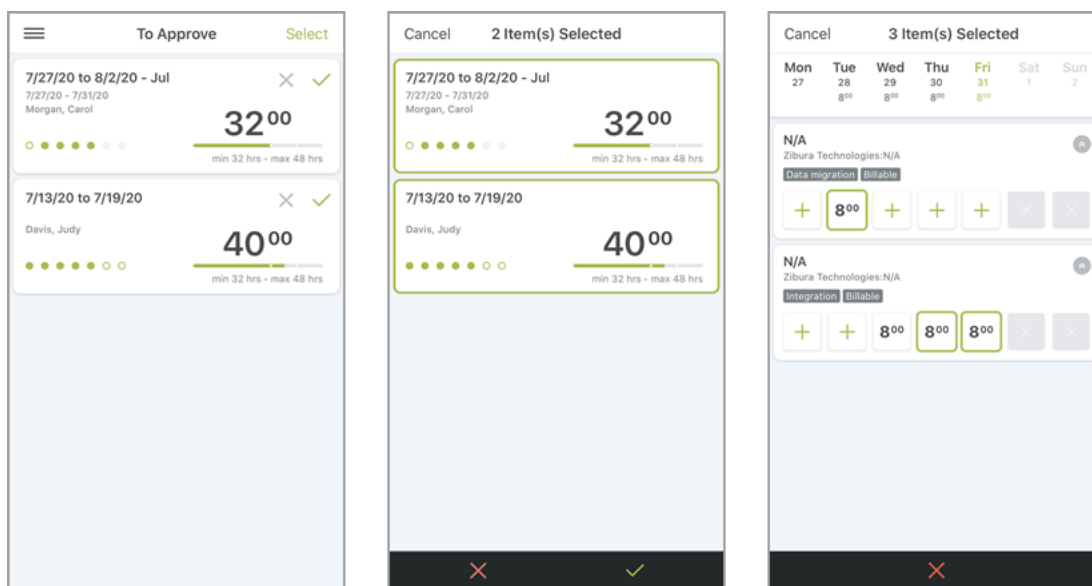
## Approving or Rejecting Timesheets

If you manage other employees or approve their timesheets, you can use OpenAir Mobile to approve or reject the timesheets awaiting your approval.

**Note:** Your company's OpenAir account administrator must give you the relevant privileges to enable you to approve or reject timesheets using OpenAir Mobile.

To view the list of timesheets awaiting your approval, tap **To Approve** under Timesheets in the navigation drawer. See [Navigating OpenAir Mobile](#).

- You can approve or reject timesheets one at a time. See [Approving or Rejecting a Timesheet](#).
- You can approve or reject multiple timesheets for approval at the same time using the bulk-action mode. See [Approving or Rejecting Multiple Timesheets at the Same Time](#).
- You can reject selected time entries in a timesheet and then approve the rest of the timesheet. See [Rejecting Selected Time Entries on a Timesheet](#)



## Approving or Rejecting a Timesheet

You can use OpenAir Mobile to approve or reject a timesheet.

### To approve or reject a timesheet:

1. On the Timesheets To Approve list, do one of the following:
  - Tap the check mark icon ✓ or the cross mark icon ✗ in the timesheet summary. See [Timesheets Lists in OpenAir Mobile](#).
  - Tap the timesheet summary to view the timesheet screen, then tap the check mark icon ✓ or the reject icon ✗ in the timesheet toolbar. See [Timesheets in OpenAir Mobile](#).

The Approve screen or Reject screen appears.

Cancel	Approve	Done
APPROVAL INFORMATION		
Additional emails		
Notes		




Cancel	Reject	Done
REJECT INFORMATION		
Additional emails		
Notes (reason)		Required

- (Optional) To send a copy of the approved or rejected timesheet notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
- To add notes for the attention of the employee who submitted the timesheet, tap **Notes** and enter some notes. Notes (reason) are required when rejecting a timesheet, optional when approving a timesheet.
- Tap **Done (iPhone)**, or **Approve** or **Reject (Android)** to approve or reject the timesheet and return to the list.

## Approving or Rejecting Multiple Timesheets at the Same Time

You can approve or reject multiple timesheets at the same time using the bulk-action mode.

### To approve or reject multiple timesheets at the same time:


- On the Timesheets To Approve list, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Timesheets Lists in OpenAir Mobile](#).
- To select the timesheets you want to approve or reject, tap each timesheet summary one after the other. You can tap any selected timesheets again to unselect them.
- Tap the check mark icon  or the reject icon  in the list toolbar. The Approve screen or Reject screen appears.
- (Optional) To send a copy of the approved or rejected timesheet notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
- To add notes for the attention of the employee who submitted the timesheets, tap **Notes** and enter some notes. Notes are required when rejecting a timesheet, optional when approving a timesheet.
- Tap **Done** to approve or reject the selected timesheets and return to the list.


## Rejecting Selected Time Entries on a Timesheet


You can reject selected time entries in a timesheet.

### To reject selected time entries on a timesheet:

- On the Timesheets To Approve list, tap the timesheet summary to view the timesheet screen. See [Timesheets Lists in OpenAir Mobile](#).

2. On the timesheet screen, tap **Select (iPhone)** or the select icon  **(Android)** in the top right corner. See [Timesheets in OpenAir Mobile](#).
3. To select the time entries you want to reject, tap each time entry cell one after the other. You can tap any selected time entry cells again to unselect them.

 **Note:** Remember you can select time entry cells across multiple time card rows, multiple time cards, and if your timesheet period covers more than one week, multiple weeks. Swipe the calendar right or left to view the previous or next week

4. Tap the reject icon  in the timesheet toolbar. The Reject screen appears.
  - a. To reject the time entry, tap **Select and reject time entries** and reject one or multiple time entries.
  - b. To reject the timesheet, tap **Reject entire timesheet**.
5. To add notes for the attention of the employee who submitted the timesheet, tap **Reason** and enter some notes. Notes are required when rejecting a time entry.
6. Tap **Done (iPhone)** or **Reject (Android)** to reject the time entries and return to the list.

# Working with Expenses in OpenAir Mobile

To access the list of Expenses To Approve, Open Expenses, Submitted Expenses, Rejected Expenses or Approved Expenses, tap the corresponding status row in the navigation drawer. See [Navigating OpenAir Mobile](#).

You can create, edit, submit, approve or reject expense reports using OpenAir Mobile. You can also add an image attachment to expense reports and receipts. Your expenses data is updated automatically in real-time when your device is connected to the internet.

The following help topics introduce the different screens and features in the OpenAir Mobile Expenses module:

- [Expenses Lists in OpenAir Mobile](#)
- [Expense Reports in OpenAir Mobile](#)
- [Expense Reports in OpenAir Mobile](#)
- [Receipts in OpenAir Mobile](#)
- [Expense Attachments in OpenAir Mobile](#)

The following help topics describe the most common processes you may use when working with expenses:

- [Creating an Expense Report](#)
- [Editing Expense Report Properties](#)
- [Deleting Expense Reports](#)
- [Deleting Multiple Expense reports at the same time](#)
- [Adding or Editing Receipts](#)
- [Deleting Receipts](#)
- [Deleting Multiple Receipts at the Same Time](#)
- [Working with Image Attachments on Expense Reports Receipts and Receipt drafts](#)
- [Submitting Expense Reports](#)
- [Approving or Rejecting an Expense Report](#)

## Expenses Lists in OpenAir Mobile

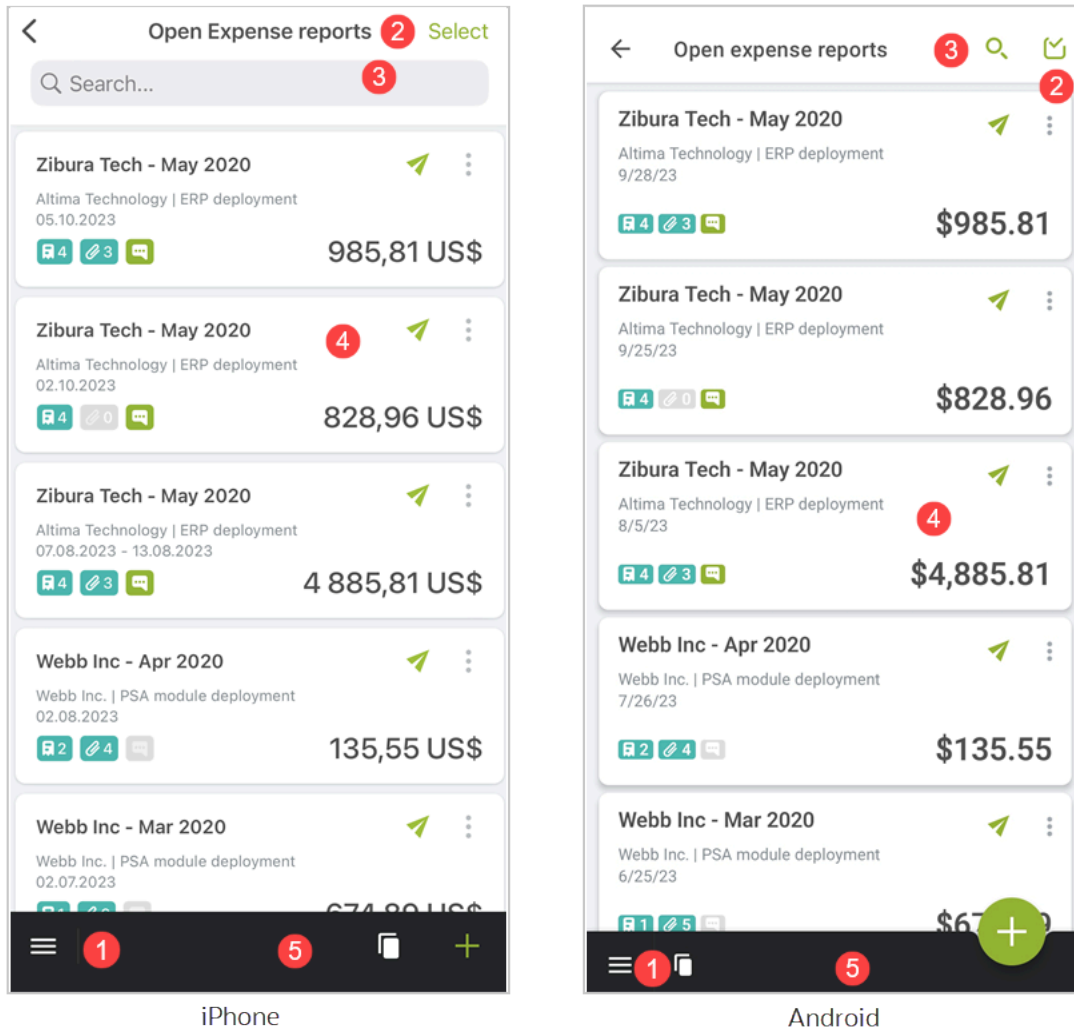
Expenses lists give you a quick overview of your expense reports by status. You can perform certain actions on one or multiple expense reports at the same time.




To access the list of Expenses To Approve, Open Expenses, Submitted Expenses, Rejected Expenses or Approved Expenses, tap the corresponding status row in the navigation drawer. See [Navigating OpenAir Mobile](#).





The expenses lists include the following elements:

- The list shows summary information for expense reports in descending date order (the most recent first).
- The list shows only expense reports with dates within the last two years. The navigation drawer indicates the total number of expense reports per status but you can only view expense reports for the last two years using OpenAir Mobile.
- The Approved expense reports list shows up to a maximum of 10 expense reports. The navigation drawer indicate the total number of approved expense reports but you can only view the 10 most recent approved expense reports using OpenAir Mobile.

On Android, swipe down to get the latest information from the OpenAir server.









1	<p><b>Menu</b> — To view the navigation drawer, tap the menu icon  from any lists or from the dashboard. See <a href="#">Navigating OpenAir Mobile</a></p> <p>The top bar includes the following information:</p> <ul style="list-style-type: none"> <li>■ <b>Title</b> of the current list.</li> <li>■ From the navigation drawer, you can go to other lists in OpenAir Mobile, review the app configuration settings, or synchronize your data. See <a href="#">Navigating OpenAir Mobile</a>.</li> </ul>
2	<p><b>Bulk actions</b> — OpenAir Mobile lets you perform actions on multiple expenses at one time.</p> <p>When the option is available, the app shows a <b>Select</b> link (<b>iPhone</b>) or a select icon  (<b>Android</b>). See <a href="#">Bulk Actions in Expenses Lists</a>.</p>
3	<p><b>Search</b> — To find an expense report, tap the Search bar (<b>iPhone</b>) or search icon  (<b>Android</b>) and type a few characters. The expense reports are filtered as you type and the list shows only expense reports with information matching your search string. You can search for any of the information that is visible on the expense report summary.</p>
4	<p><b>Expense report summary</b> — The expense report summary gives a quick overview of your expense report. See <a href="#">Expense Report Summary in Lists</a></p>

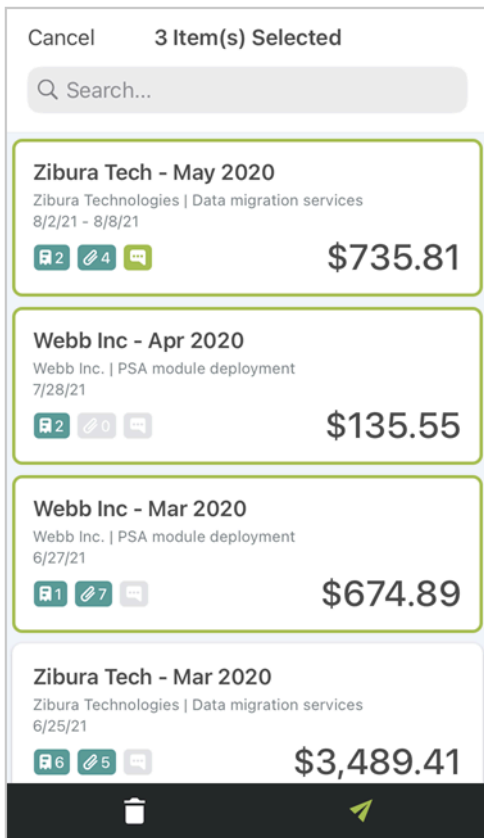
	To go to an expense report, tap the corresponding summary. From the expense report, you will be able to perform all the actions permitted according to your role permissions and to the expense report status. See <a href="#">Expense Reports in OpenAir Mobile</a>
5	<p><b>Actions toolbar</b> — The actions toolbar includes all the actions available in the list.</p> <p>From the open expense reports list:</p> <ul style="list-style-type: none"> <li>■ To copy an existing expense report, tap the clone icon .</li> <li>■ To create a new expense report from blank: <ul style="list-style-type: none"> <li>□ Tap the add icon  (<b>iPhone</b>) or the add button  (<b>Android</b>). See <a href="#">Creating an Expense Report</a>.</li> <li>□ Tap and hold the OpenAir application on the mobile device home screen, then tap the <b>New expense report</b> shortcut option. See <a href="#">Navigating OpenAir Mobile</a>.</li> </ul> </li> <li>■ To view the navigation drawer, tap the menu icon  to return to the dashboard tap outside of the navigation drawer. From the dashboard or the navigation drawer, you can navigate to other lists in OpenAir Mobile, review the app configuration settings, or synchronize your data. See <a href="#">Navigating OpenAir Mobile</a></li> </ul>

## Bulk Actions in Expenses Lists

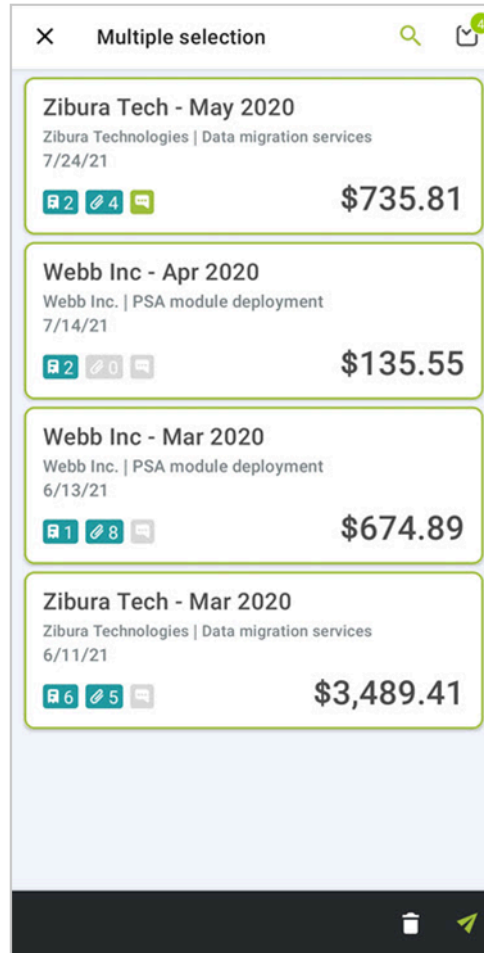
To select multiple Expense reports in the Expenses To Approve, Open Expenses and Rejected Expenses lists, tap **Select (iPhone)** or the select icon  (**Android**) then tap the expense reports you want to select.

- The number of items selected shows at the top, in place of the list title (**iPhone**) or on the select icon  (**Android**).
- The items selected are highlighted with a green outline.
- The actions you can perform depend on the list:
  - For open or rejected expense report:
    - To submit the selected expense reports, tap the submit icon .
    - To delete the selected expense reports, tap the delete icon .
  - For expense reports to approve:
    - To approve check mark icon .
    - To reject the selected expense reports, tap the reject icon .
- To exit the bulk-action mode and return to the list, tap **Cancel (iPhone)** or the close icon  (**Android**).





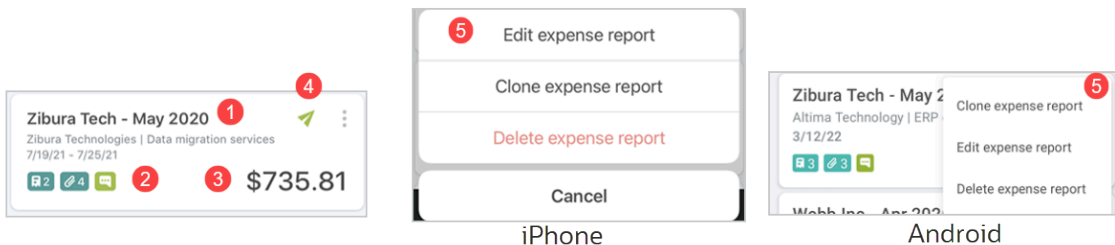
iPhone



Android

## Expense Report Summary in Lists












The expense report summary gives a quick overview of your expenses and lets you perform certain actions, depending on your role permissions and on the expense status.



iPhone

Android

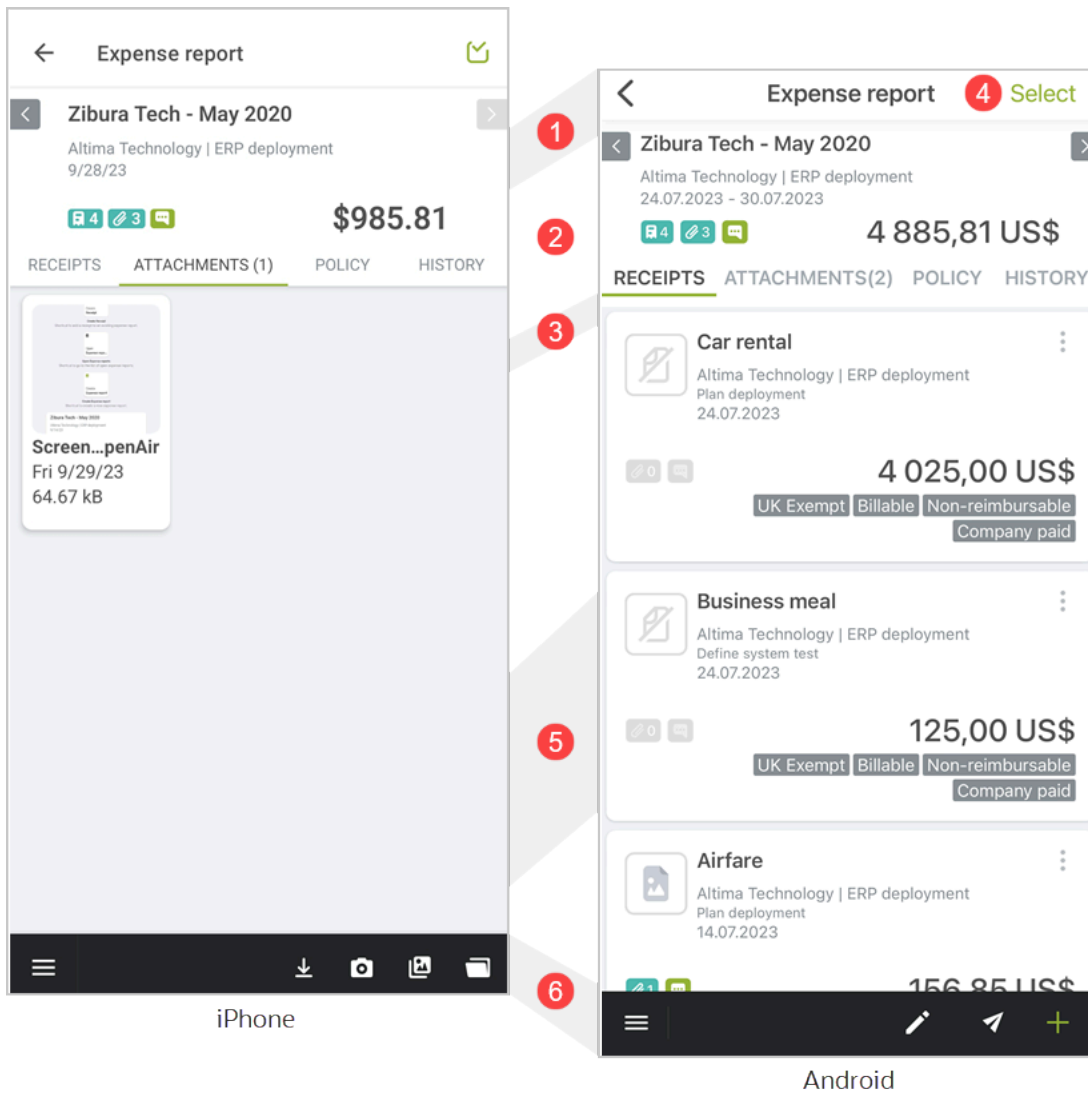
- 1 Expense report name & dates** — The summary shows the name of the expense report, the type of expenses and the date it was created. For submitted expenses the date shows in the summary. In the Expenses to approve list, the summary also shows the name of the employee who submitted the expense report.

2	<p><b>Total number of receipts, attachments and comments</b> — The summary shows the total number of receipts in the expense report  and the total number of attachments across all receipts in the expense report . If there are any notes created for this expense report the notes icon  shows in green color.</p>
3	<p><b>Total amount</b>— The expense report summary shows the total cost of all receipts in the expense report.</p>
4	<p><b>Actions</b> — You can perform some actions straight from the expense report summary in the list. The actions you can perform depend on the expense report status:</p> <ul style="list-style-type: none"> <li>■ For open expense reports: <ul style="list-style-type: none"> <li>□ To submit the expense report, tap the submit icon .</li> <li>□ To show a context menu with more options, tap the more icon .</li> </ul> </li> <li>■ For expense reports to approve: <ul style="list-style-type: none"> <li>□ To approve the expense report, tap the check mark icon .</li> <li>□ To reject the expense report, tap the reject icon .</li> </ul> </li> <li>■ For submitted and approved expense reports: <ul style="list-style-type: none"> <li>□ To copy the expense report, tap the clone icon .</li> </ul> </li> <li>■ For rejected expense reports: <ul style="list-style-type: none"> <li>□ To re-submit the expense report, tap the submit icon .</li> <li>□ To copy the expense report, tap the clone icon .</li> </ul> </li> </ul>
5	<p><b>More actions</b> — For open and rejected expense reports, tap the more icon  then:</p> <ul style="list-style-type: none"> <li>■ To edit an expense report, tap <b>Edit expense report</b>.</li> <li>■ To copy the expense report, tap <b>Clone expense report</b>.</li> <li>■ To pin the expense report to the dashboard, tap <b>Pin to dashboard</b>. See, <a href="#">Pinned Timesheets, Expense Reports or Receipts</a>. If the item is already pinned to the dashboard, the context menu shows an <b>Unpin from dashboard</b> option instead.</li> <li>■ To delete an expense report, tap <b>Delete expense report</b>.</li> <li>■ To cancel all actions, tap <b>Cancel</b> (iPhone only)</li> </ul>






## Expense Reports in OpenAir Mobile

You can use expense reports in OpenAir Mobile to collect your expense receipts and submit them for approval. Your expense reports in OpenAir Mobile are synchronized automatically with your expense reports in OpenAir, after you make changes in OpenAir Mobile. See [Synchronizing OpenAir Mobile with OpenAir](#).


In an expense report list, tap an expense report summary to view the expense report. The expense report screen shows summary information about the expense report and four tabs showing the list of receipts, the list of attachments, any applicable expense policy, and the expense report history.




1	<p><b>Top bar</b> — The top bar includes the following functionality:</p> <ul style="list-style-type: none"> <li>To return to the list, tap the back icon (<b>iPhone</b>) &lt; and &lt; (b&gt;Android). On Android tap the search icon 🔍 to find an expense report or receipt.</li> <li>To select multiple receipts, tap <b>Select (iPhone)</b> or the select icon 🗑️ (<b>Android</b>). You can then delete all the selected receipts at the same time (on Open or Rejected expense reports), and approve or reject all the selected receipts at the same time (on expense reports "To approve"). See <a href="#">Deleting Receipts</a> and <a href="#">Rejecting Selected Receipts on an Expense Report</a>.</li> </ul>
2	<p><b>Expense report summary</b> — The expense report summary gives the same overview information as in the expense report list. See <a href="#">Expense Report Summary in Lists</a>.</p> <p>To go to the previous or the next expense report tap the previous button &lt; or the next button &gt;. If the arrow icon appear in light gray color, you have reached the first or last available expense report. To view or edit the expense report properties, tap the expense report summary.</p>
3	<p><b>Expense report navigation and tabs</b> — There are four tabs under the expense report summary.</p> <ul style="list-style-type: none"> <li>The <b>Receipts</b> tab shows the receipts listed in reverse order of the tracking number (highest tracking number first). The Receipts tab is described in this table and pictured in the screenshot above.</li> </ul>

	<ul style="list-style-type: none"> <li>■ The <b>Attachments</b> tab lets you view or add attachments. Attachments are in reverse date order (most recently added attachment first). See <a href="#">Expense Attachments in OpenAir Mobile</a>.</li> <li>■ The <b>Policy</b> tab shows the details of the relevant project expenses policy. See <a href="#">Expenses Policy</a>.</li> <li>■ The <b>History</b> tab shows the creation and approval history of the expense report. See <a href="#">Expense Report History</a>.</li> </ul>
4	<p><b>Search</b> — To find an expense report or receipt, swipe down to see the search bar (<b>iPhone</b>) or tap the search (<b>Android</b>) and type a few characters. The receipts are filtered as you type and the expense report shows only receipts with information matching your search string. You can search for any of the information that is visible on the receipt summary.</p>
5	<p><b>Receipt Summary</b> — Receipts are the individual expense items added to your expense report. The receipt summary gives a quick overview of your receipt. See <a href="#">Receipt Summary on Expense Reports</a>.</p>
6	<p><b>Actions toolbar</b>— The actions toolbar includes all the actions available for the expense report you are viewing:</p> <ul style="list-style-type: none"> <li>■ To submit the expense report, tap submit icon  (<b>iPhone</b>) or  (<b>Android</b>).</li> <li>■ To edit an expense report tap the edit icon . See <a href="#">Editing Expense Report Properties</a>.</li> <li>■ To add a new receipt or add a receipt from your draft inbox, tap the add icon  or the add button . See <a href="#">Adding or Editing Receipts</a>.</li> </ul>

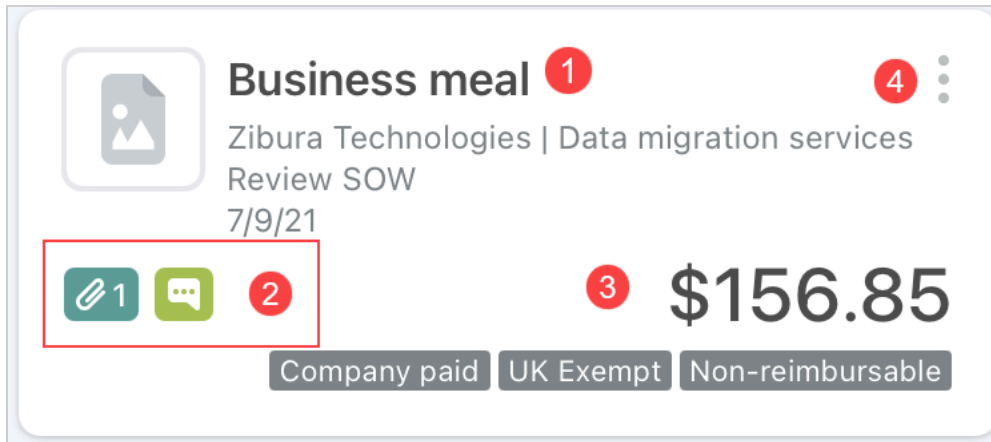
## Bulk Actions on the Expense Report Screen








To select multiple receipts when viewing an expense report to approve, an open expense report or rejected expense report, tap Select (**iPhone**) or the select icon  (**Android**) then tap the receipts you want to select.

- The number of items selected shows at the top, in place of the screen title (**iPhone**) or on the select icon  (**Android**).
- The items selected are highlighted with a green outline.
- The actions you can perform depend on the expense report status:
  - For open or rejected expense reports, to delete the selected receipts, tap the delete icon.
  - For expense reports to approve, to reject the selected receipts, tap the reject icon.
- To exit the bulk-action mode and return to the list, tap Cancel (**iPhone**) or the close icon (**Android**).

## Receipt Summary on Expense Reports

The receipt summary gives a quick overview of your expenses, and lets you perform certain actions, depending on your role permissions and on the expense report status. The receipt summary is highlighted with a red outline if there are any submission errors for this receipt.



<b>1</b>	<b>Receipt name &amp; dates</b> — The summary shows the name of the receipt , the type of the receipt and the date it was created. For submitted expenses the date shows in the summary. To view or edit receipt details, tap the receipt. See <a href="#">Adding or Editing Receipts</a>
<b>2</b>	<b>Total number of attachments and comments</b> — The summary shows the total number of attachments in the attachment icon  . The notes icon  shows in green color if the expense report includes notes.
<b>3</b>	<b>Total amount</b> — The expense report summary shows the total cost of all the receipts in the expense report.
<b>4</b>	<b>Actions</b> — You can perform some actions straight from the receipt summary in the list. The actions you can perform depend on the expense report status: <ul style="list-style-type: none"> <li>■ For open expense reports:           <ul style="list-style-type: none"> <li>To show a context menu with more options, tap the more icon  and you tap the option <b>Delete receipt</b> to delete the receipt or cancel to cancel all actions.</li> </ul> </li> <li>■ For expense reports to approve:           <ul style="list-style-type: none"> <li>To reject the expense report, tap the reject icon  to reject the receipt.</li> </ul> </li> <li>■ For rejected expense reports:           <ul style="list-style-type: none"> <li>□ To re-submit the receipt, tap the submit icon .</li> <li>□ To show a context menu with more options, tap the more icon .</li> </ul> </li> </ul>
<b>5</b>	<b>More actions</b> — For open and rejected expense reports, tap the more icon  then: <ul style="list-style-type: none"> <li>■ To edit a receipt, tap <b>Edit receipt</b></li> <li>■ To move a receipt, tap <b>Move receipt</b></li> <li>■ To clone a receipt, tap <b>Clone receipt</b></li> <li>■ To delete a receipt, tap <b>Delete receipt</b></li> <li>■ To pin a receipt to the dashboard, tap <b>Pin to dashboard</b>. See <a href="#">Pinned Timesheets, Expense Reports or Receipts</a>.</li> </ul> <p>If the item is already pinned to the dashboard, the context menu shows an <b>Unpin from dashboard</b> option instead.</p> <ul style="list-style-type: none"> <li>■ To cancel all actions, tap <b>Cancel</b>.</li> </ul>

## Expense Report History

To view the history of an expense report, go to that expense report screen and tap the **History** tab.

The history screen shows the creation, and approval history of expense report.

## Expenses Policy

Depending on your company's OpenAir account configuration, a specific expenses policy may be defined for each project to enforce any restrictions and limits on the expenses you can claim. If the project expenses policy only allows specific expense items, you can only select from these options when adding or editing a receipt for this project. If there is a maximum cost or a fixed rate enforced for a specific expense item, the cost you enter will be changed to respect the expenses policy.

To view the project expenses policy, tap the **Policy** tab.

## Receipts in OpenAir Mobile

Receipts are expense items that contain information about costs incurred by employees and collected in expense reports. You can use receipts to record your expense items.

- To add a new receipt to an expense report, go to the **Receipts** tab and tap the add icon **+** (**iPhone**) or **+** (**Android**) on the expense report screen.
- To view or edit an existing receipt, tap the receipt you want to edit.

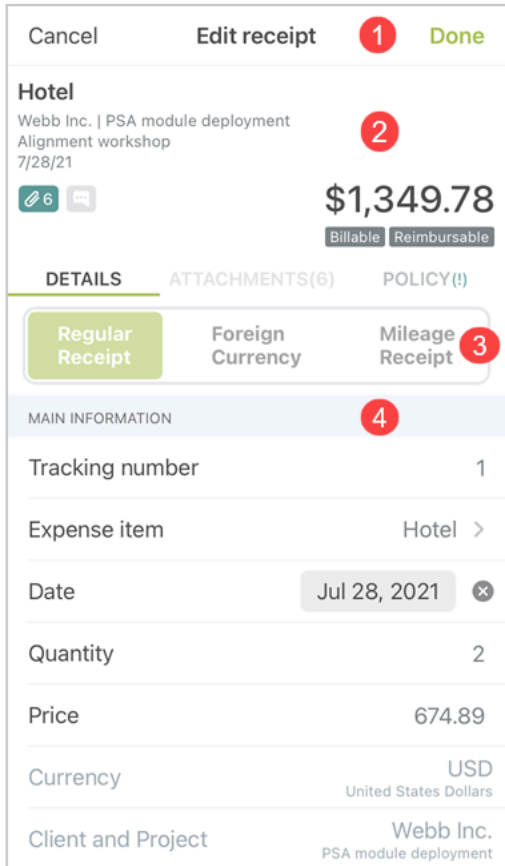
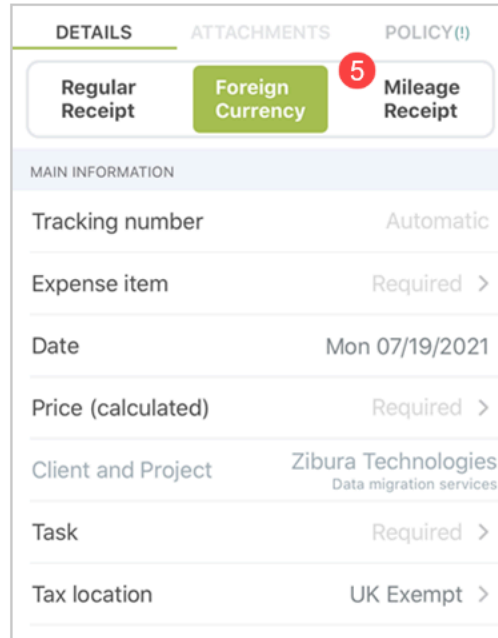
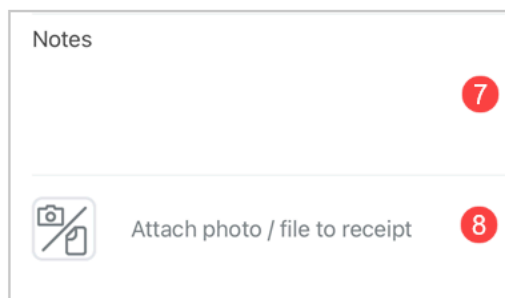
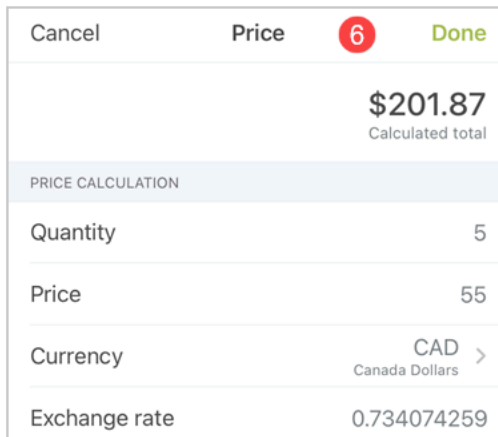
The receipt form shows the same information as the Edit receipt form in OpenAir.

- The information about the form depends on your company's OpenAir account configuration controlled by your account administrators.
- If your account is configured to require one expense report per project, the Customer and Project details are populated automatically when creating a receipt and they are read-only.
- If your company's OpenAir account allows you to select a Payment type on receipts, the default payment type and payment type settings in OpenAir Mobile are the same as in OpenAir. Payment status options (reimbursable or non-reimbursable) and the default payment status are also based on the OpenAir account settings.

There may be three receipt types depending on the configuration of your company's OpenAir account.


- Regular receipt — default receipt type.
- Foreign Currency — use this receipt type, if you incurred the expenses in a currency other than your base currency.
- Mileage receipt — use this receipt type for mileage rates, if available.

**Note:** You can choose the receipt type when adding a new receipt but you cannot change the receipt type when editing an existing receipt.

**1 Top bar** — The top bar includes the following functionality:

- To save the receipt and return to the expense report, tap **Done**. See [Adding or Editing Receipts](#).
- To discard any changes and return to the expense report, tap **Cancel (iPhone)** or the cancel icon **X** (**Android**).

2	<p><b>Receipt summary</b> — The receipt summary gives a quick overview of your expenses, and lets you perform certain actions, depending on your role permissions and on the expense report status. See <a href="#">Receipt Summary on Expense Reports</a>.</p>
3	<p><b>Tabs on the edit receipt screen:</b></p> <ul style="list-style-type: none"> <li>■ The <b>Details</b> tab navigation lets you view or edit all receipt details. The Details tab is described in this table and pictured in the screenshot above.</li> <li>■ The <b>Attachments</b> tab navigation lets you view or add attachments. Attachments are listed in reverse date order (most recently added attachment first). See <a href="#">Expense Attachments in OpenAir Mobile</a>.</li> <li>■ The <b>Policy</b> tab navigation shows any applicable restrictions and limits for the expense item as per the project expenses policy.</li> <li>■ Foreign Currency, is the receipt you use if you incurred the expenses in a currency other than your base currency.</li> </ul>
4	<p><b>Receipt form</b> — To add or edit any information about the form:</p> <ul style="list-style-type: none"> <li>■ If the line includes a caret icon &gt; on the right tap the line and select an option or to enter additional information about a subform. You need to select or enter all required information with the mention <b>Required</b> before you can save the receipt.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p> <b>Note:</b> To view the ID and phase of a task on a receipt, tap the caret icon &gt; next to the Task line.</p> </div> <ul style="list-style-type: none"> <li>■ If the line includes a toggle, tap the toggle to change the value. The toggle shows in grey when Off and in green when On.</li> <li>■ For text and number fields, tap the line and use the on-screen keyboard to enter a value, tap the clear icon to clear the existing value.</li> <li>■ For date fields, tap the line and pick a date from the calendar, tap the clear icon to clear the selected date.</li> </ul>
5	<p><b>Foreign currency</b> — To create a receipt you use if you incurred the expenses in a currency other than your base currency:</p> <ul style="list-style-type: none"> <li>■ Tap the <b>Foreign Currency</b> tab.</li> <li>■ Enter the details of the receipt on the form, such as tax location, payment type and receipt status.</li> </ul>
6	<p><b>Price</b> — To enter the price of the foreign receipt and receipt currency.</p>
7	<p><b>Notes</b> — You can add some additional notes before saving the receipt.</p>
8	<p><b>Attachments</b> — You can add or delete attachments directly from the form.</p> <ul style="list-style-type: none"> <li>■ To add an attachment, tap the attach photo or file button, then: <ul style="list-style-type: none"> <li>□ Tap the <b>Open camera</b> option and take a picture of the attachment.</li> <li>□ Tap the <b>Select photo from library</b> option and choose the file from your library.</li> <li>□ Tap the <b>Select file from cloud (iPhone)</b> or <b>Select file(s) from documents (Android)</b> to select a file on iCloud or documents on your device.</li> </ul> </li> <li>■ To remove an attachment, tap the cross icon ✕ in the top right corner of the attachment you want to remove.</li> </ul>

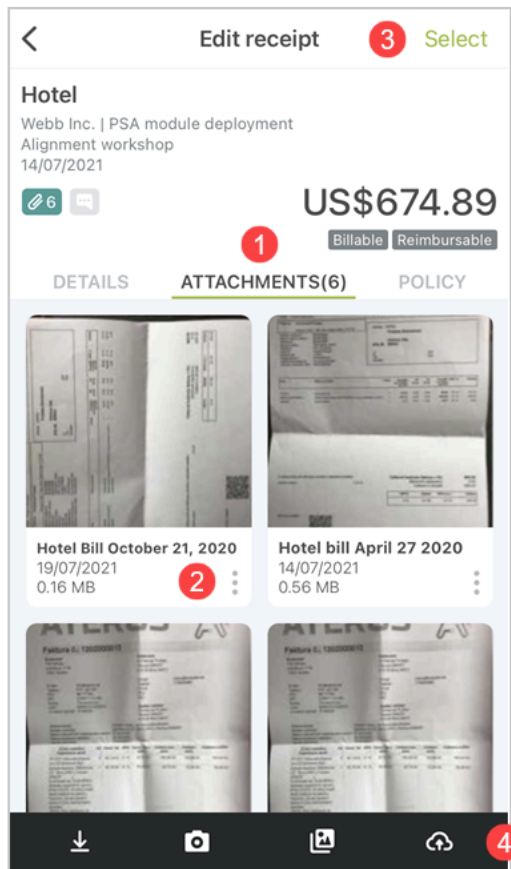
## Expense Attachments in OpenAir Mobile

OpenAir Mobile lets you view, add and edit multiple attachments to an open or rejected expense report, or to a receipt therein, at any time before you submit the expense report for approval.


See also [Working with Image Attachments on Expense Reports Receipts and Receipt drafts](#).



**Note:** It is not possible to add, delete, or edit attachments associated with a receipt or expense report that is submitted for approval or approved.












- 1 **Attachments tab** — The attachment tab on the expense report or receipt screen lets you view or add attachments associated with the expense report or receipt. Attachments are listed in reverse date order (most recently added attachment first).
- 2 **Attachment thumbnail** — The attachment thumbnail includes the following information:
  - A small preview of the attachment, if the attachment file is saved on the device, or the text "Tap to download" if the attachment file is not saved on the device.
  - The file name, date and size of the attachment.

On iPhone, you can tap the more icon  to access the following actions:

  - To edit the attachment, tap **Edit**. For more information, see [Image Attachment Editing Tools](#).
  - To view the attachment, tap **View**.
  - To share the attachment, tap **Share**.
  - To delete the attachment, tap **Delete**.

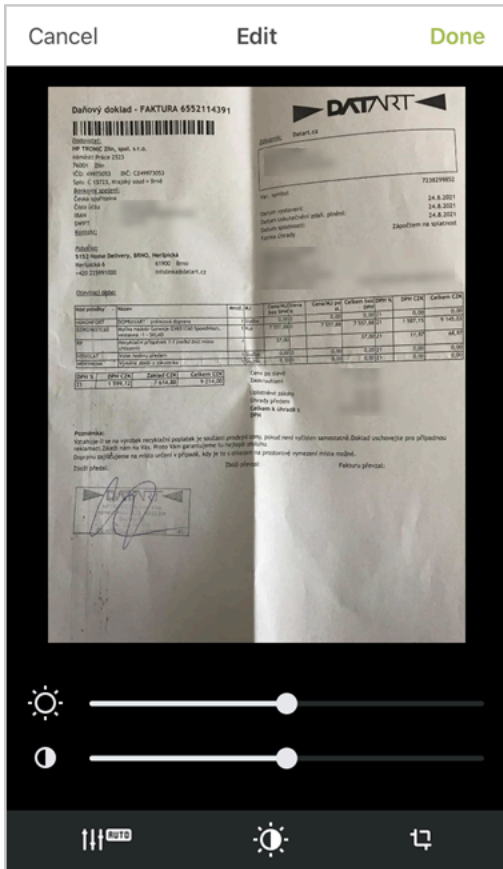
On Android, you can tap the attachment thumbnail to access the following actions:

  - To edit the attachment, tap **Edit**. For more information, see [Image Attachment Editing Tools](#).
  - To delete the attachment, tap the delete icon at the toolbar .
  - To share the attachment, tap the share icon at the toolbar .

3	<p><b>Bulk actions</b> — You can delete multiple attachments at the same time:</p> <ul style="list-style-type: none"> <li>■ On the <b>Attachment</b> tab, tap <b>Select (iPhone)</b> or the select icon  (<b>Android</b>) in the top right corner of the screen.</li> <li>■ Tap to select the attachments from the grid.</li> <li>■ Tap the delete icon  on the toolbar.</li> </ul>
4	<p><b>Actions toolbar</b>— You can perform some actions directly from the Attachments tab toolbar.</p> <ul style="list-style-type: none"> <li>■ Tap the download icon  to download all the attachments. You can also download attachments individually by tapping each attachment thumbnail.</li> <li>■ Tap the camera icon  to take a picture and add it as an attachment.</li> <li>■ Tap the gallery icon  to select files from your device and attach them to the expense report or receipt. You can select multiple files.</li> <li>■ Tap the cloud icon  (<b>iPhone</b>) or documents icon  (<b>Android</b>) to select a file on iCloud or documents on your device.</li> </ul>

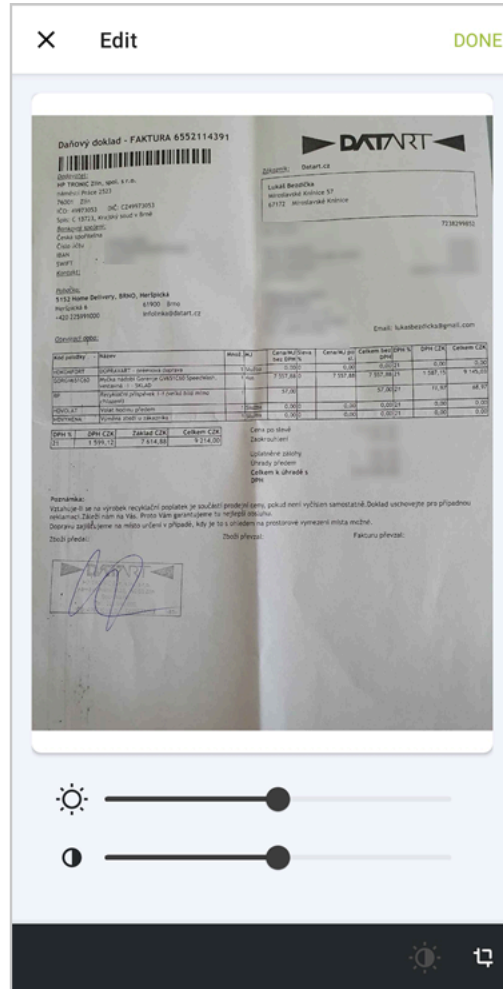
## Image Attachment Editing Tools

OpenAir lets you edit the attachments using image attachment editing tools.



iPhone

1



Android

2

- 1 **Top bar** — Tap **Done** to save the changes and return to the Attachments tab. Tap **Cancel (iPhone)** or the cancel icon **X (Android)**.
- 2 **Image edit actions toolbar** — You can edit the images directly from the toolbar. To edit an attachment:
  - To adjust the brightness of the image. tap the brightness sliders ☀️ .
  - To adjust the contrast of the image, tap the contrast sliders 🔍 .
  - Tap the rotation icons to rotate the image to the left ↶ or to rotate the image to the right ↷.
  - Tap the crop icon to adjust the size of the image 📏.


Tap **Reset** button to reset any changes.

On **iPhone** :

  - You can automatically adjust the contrast and brightness of the image with the auto adjust icon 📏.
  - You can alter the orientation of the image and direct it to any direction and degree with the orientation icon 📏.

On **Android**:

  - You can alter the orientation of the image from left to right ↶↷ and from up to down ↕ with the flip icons.


 **Note:** At any time you can tap **Cancel** and then **Discard** to discard any changes and return to the attachments screen.

## Creating an Expense Report

You can use OpenAir Mobile to create expense reports. After an expense report is created, you can change the expense report information, add or modify receipts and add attachments at any time before you submit the expense report for approval.

### Creating an Expense Report From Blank

#### To create an expense report from blank:

1. Do one of the following:
  - On the OpenAir Mobile application on your **iPhone** and **Android** device, tap and hold the Application icon and then tap the **New expense report** shortcut icon. The new expense report form appears.
  - On the OpenAir Mobile dashboard, tap the **Create Expense report** widget or the **Create** widget and then tap Expense report to create a new expense report. See [Navigating OpenAir Mobile](#).
  - On the Open Expenses list, tap the add icon  in the toolbar in the bottom right corner. See [Expenses Lists in OpenAir Mobile](#)

The New Expense Report form appears. Depending on your company's OpenAir account configuration, you may need to create one expense report for each project.

iPhone

Android

2. To select or enter the information, tap a line on the form. If the line includes a caret icon on the right tap the line to select an option or to enter additional information about a subform. For example, tapping the Price field for a foreign currency receipt brings up a subform letting you enter the price in the foreign currency and exchange rate (if applicable). Enter the information. You need to select or enter all required information with the mention "Required" before you can save the receipt.

- For text and number fields, tap the line and use the on-screen keyboard to enter a value, tap the clear icon to clear the existing value.
- For date fields, tap the line and pick a date from the calendar, tap the clear icon to clear the selected date.

Repeat to enter or select all information about the form. You need to select or enter all required information with the mention "Required" before you can save the expense report. Display only information shows in gray color text.

3. Tap **Notes** and enter any notes if required.
4. You can add or delete attachments directly from the form.
  - To add an attachment, tap the attach photo or file button, then:
    - Tap the **Open camera** option and take a picture of the attachment.
    - Tap the **Select photo from library** option and choose the file from your library.

- Tap the **Select file from cloud (iPhone)** or **Select file(s) from documents (Android)** to select a file on iCloud or documents on your device.
  - To remove an attachment, tap the cross in the top right corner of the attachment you want to remove.
- 5. Tap **Done** to save the expense report properties and open the new expense report. You can now add receipts and attachments to the expense report. See [Adding or Editing Receipts](#).

## Copying an Existing Expense Report




You can create a new expense report from any of your existing expense reports which you can view using OpenAir Mobile.

**Note:** The Approved expense reports list only lists up to 10 most recent approved expense reports covering periods within the last two years to date.

When you copy an existing expense report, the following cloning options are required:

- Receipt dates — The receipt dates in the new expense report should be:
  - Adjusted forward — The receipt dates are adjusted based on the difference between the dates of the previous expense report and the dates of the new expense report.
  - Expense report date — The receipt dates will have the same date as the date of the expense report.
- Receipt amounts — The receipt amounts in the new expense report should be:
  - Same amounts — The receipt price in the new expense report is the same as the expense report.
  - Empty — The receipt price will be zero in the new expense report.

### To create a new expense report from an existing expense report:

1. Do one of the following:
  - On the Open Expense Report list, tap the clone icon  in the toolbar then tap the expense report you want to copy from the Select Expense report selection screen. See [Expenses Lists in OpenAir Mobile](#).
  - On any expense report list containing the expense report you want to copy, tap the clone icon  in the expense report summary, or tap the more icon  then tap **Clone expense report** in the context menu. See [Expense Report Summary in Lists](#).

The Clone Expense Report properties screen appears.


2. The Clone Expense Report screen is similar to the New Expense Report screen with the added Clone options section. See [Creating an Expense Report From Blank](#).
  - a. Tap the **Receipt dates** and **Receipt amounts** then tap one of the available options

Cancel	<b>Clone expense report</b>	<b>Done</b>
CLONING OPTIONS		
Receipt dates	Required	>
Receipt amounts	Required	>



- b. To change the Main Information settings, tap the setting and select an option.
3. Tap **Done** to create and open the new expense report. The synchronization process begins. You can add or edit receipts. See [Adding or Editing Receipts](#).

## Editing Expense Report Properties

You can edit the properties of an open or rejected expense report at any time before you submit it for approval.

 **Note:** Depending on your role permissions, you may be able to edit the properties of a submitted expense report.

### To edit the properties of an expense report:

1. Do one of the following:
  - On the Open or Rejected Expenses list, tap the more icon  in the expense report summary then tap **Edit expense report** in the context menu. See [Expense Report Summary in Lists](#).
  - On the expense report screen, tap the edit icon  in the toolbar or the expense report summary. See [Expense Reports in OpenAir Mobile](#).

The Edit Expense report screen appears. It is similar to the New Expense report screen — see [Creating an Expense Report](#).

2. To change any information about the form, tap the corresponding line, then select or enter the information, in the same way as when creating an expense report.
3. Tap **Done** to save the changes and return to the list or expense report.

## Deleting Expense Reports


You can delete open or rejected expense reports at any time before you submit them for approval.

- You can delete expense reports one at a time. See [Deleting Expense Reports](#).
- You can delete multiple expense reports at the same time using the bulk-action mode. See [Deleting Multiple Expense reports at the same time](#).

### Deleting an Expense report

You can delete expense reports one at a time.



#### To delete an expense report:

1. On the Open or Rejected expense reports list, tap the more icon  in the expense report summary then tap **Delete expense report** in the context menu. See [Expense Report Summary in Lists](#).  
A confirmation dialog appears.
2. Tap **Delete** to delete the expense report and return to the list.

## Deleting Multiple Expense reports at the same time

You can delete multiple expense reports at the same time using the bulk-action mode.

### To delete multiple expense reports at the same time:

1. On the Open or Rejected Expense report list, tap **Select (iPhone)** or the select icon (**Android**)  in the top right corner. See [Bulk Actions in Expenses Lists](#).
2. To select the expense reports you want to delete, tap each expense report summary one after the other. You can tap any selected expense reports again to unselect them.
3. Tap the delete icon  in the list toolbar. A confirmation dialog appears.
4. Tap **Delete** to delete the selected expense reports and return to the list.



**Important:** If you delete an expense report, all receipts and attachments in the expense report will be deleted.

## Adding or Editing Receipts

You can add or edit receipts to an open or rejected expense report at any time before you submit it for approval.





**Note:** Depending on your company's OpenAir account configuration, a specific expenses policy may be defined for each project to enforce any restrictions and limits on the expenses you can claim.

- If the project expenses policy only allows specific expense items, you can only select from these options when adding or editing a receipt for this project.
- If there is a maximum cost or a fixed rate enforced for a specific expense item, the cost you enter will be changed to respect the expenses policy.

Tap the **Policy** tab to view the details of the relevant project expenses policy.

### To add or edit a receipt

1. Do one of the following:
  - On the dashboard, tap the **Create receipt** widget or the **Create** widget and then tap Receipt and choose the expense report you want to add the receipt to. See [Widget gallery](#).
  - On the open expense report screen, do one of the following:
    - To add a new receipt or a receipt draft, tap the **Receipts** tab and tap the add icon  in the toolbar (**iPhone**) or the add button  on (**Android**).
    - To edit an existing receipt or a receipt draft, tap the corresponding receipt summary on the expense report screen.
2. The New Receipt or Edit Receipt form appears. The form shows the same information as the receipt form in OpenAir. See [Receipts in OpenAir Mobile](#).



3. If you are adding a new receipt, choose the type of receipt using the selector at the top of the Details tab. For more information, see [Receipts in OpenAir Mobile](#).

To add or edit most information on the form, tap the corresponding line, then, depending on your device:

- If the line includes a caret icon > on the right tap the line and select an option or to enter additional information about a subform. For example, tapping the Price field for a foreign currency receipt brings up a subform letting you enter the price in the foreign currency and exchange rate (if applicable) or enter the information. You need to select or enter all required information with the mention "Required" before you can save the receipt.
- If the line includes a toggle, tap the toggle to change the value. The toggle shows in grey when Off and in green when On.
- For text and number fields, tap the line and use the on-screen keyboard to enter a value, tap the clear icon to clear the existing value.
- For date fields, tap the line and pick a date from the calendar, tap the clear icon to clear the selected date.

Repeat to enter or select all information about the form. You need to select or enter all required information with the mention "Required" before you can save the expense report. Read-only information shows in gray color text. If the line includes a toggle, tap the toggle to change the value.

4. You can add or delete attachments directly from the form.

- To add an attachment, tap the attach photo or file button, then:
  - Tap the **Open camera** option and take a picture of the attachment.
  - Tap the **Select photo from library** option and choose the file from your library.
  - Tap the **Select file from cloud (iPhone)** or **Select file(s) from documents (Android)** to select a file on iCloud or documents on your device.
- To remove an attachment, tap the cross in the top right corner of the attachment you want to remove.


If you are editing a receipt, you can also manage attachments on the Attachments tab. See [Editing attachments](#).

5. To save the receipt, tap **Done** in the top right corner of the screen on **iPhone** and **Android** to save the receipt and return to the expense report.

## Copying an Existing Receipt

You can copy an existing receipt if you want to add a receipt with similar information details or properties. All the receipt details from the existing receipt will be copied across to the new receipt.

### To create a new receipt from an existing receipt on the expense report:

1. On the expense report screen, tap the more icon  on the receipt you want to copy then tap **Clone receipt** in the context menu. See [Receipts in OpenAir Mobile](#).  
The Clone receipt screen appears.
2. The Clone receipt screen is similar to the New receipt screen. Change any of the main information details or additional settings. See [Editing Expense Report Properties](#).
3. Tap **Done** to save the properties, create the new receipt and return to the expense report. The new receipt shows the same information as the receipt you copied. You can now edit the information. See [Adding or Editing Receipts](#).

## Adding receipts using the Draft Inbox

You can add receipt drafts from your draft inbox to any open or rejected expense report. See also, [Working with Drafts in OpenAir Mobile](#).

### To add a receipt

1. Select the expense report from the list of expense reports.
2. Tap the **Receipts** tab and tap the add icon + in the toolbar (**iPhone**) or the add button + on (**Android**).
3. Tap the **Add receipt from draft inbox** option.
4. Select the receipt draft from the draft inbox.
5. Change any of the main information details or additional settings. See [Editing Expense Report Properties](#).
6. Tap **Done** to save the receipt properties and return to the expense report. See [Adding or Editing Receipts](#).

**Note:** The receipt draft form is designed for quick information entry – it includes only the most important standard fields and ignores the usual standard and custom business rules for receipts in your company's OpenAir account. You may need to enter additional information before you can save the receipt.

## Moving an Existing Receipt

You can move an existing receipt from an expense report to another if you want to change the expense report of the receipt. All receipt details from the existing receipt will be moved across to the new receipt.

### To move a receipt from an expense report to another:

1. On the expense report screen, tap the more icon ⋮ on the receipt you want to move then tap **Move receipt** in the context menu. See [Receipts in OpenAir Mobile](#).  
The Move receipt screen appears.
2. Tap the **Move to** and then tap the expense report you want to move the receipt to.
3. The Move receipt screen is similar to the New receipt screen. Change any of the main information details or additional settings. See [Editing Expense Report Properties](#).
4. Tap **Done** to save the properties, create the new receipt and return to the expense report. The new receipt shows the same information as the receipt you copied. You can now edit the information. See [Adding or Editing Receipts](#).

## Deleting Receipts


You can delete receipts from an open or rejected expense report at any time before you submit it for approval.

- You can delete receipts one at a time. See [Deleting a Receipt](#).
- You can delete multiple receipts at the same time using the bulk-action mode. See [Deleting Multiple Receipts at the Same Time](#).

## Deleting a Receipt

You can delete receipts one at a time.



### To delete a receipt:

1. On the Open or Rejected Expense reports screen, tap the more icon  on a receipt then tap **Delete receipt** in the context menu. See [Expense Report Summary in Lists](#).
2. A confirmation dialog appears.
3. Tap **Delete** to delete the receipt and return to the list. Tap **Cancel** to cancel the operation.

## Deleting Multiple Receipts at the Same Time

You can delete multiple receipts at the same time using the bulk-action mode.


### To delete multiple receipts at the same time:

1. On the Open or Rejected Expense reports screen, tap **Select (iPhone)** or the select icon  in the top right corner. See [Bulk Actions in Expenses Lists](#).
2. To select the receipts you want to delete, tap each receipt one after the other. You can tap any selected receipts again to unselect them.
3. Tap the delete icon  in the list toolbar. A confirmation dialog appears.
4. Tap **Delete** to delete the selected receipts and return to the list.


## Working with Image Attachments on Expense Reports Receipts and Receipt drafts

OpenAir lets you add and manage image attachments to your expense reports and receipts using the Attachments tab. You can add an image attachment or file, view the attachment, share it on other applications and delete the attachment. For more information, see the following topics:

- [Adding Attachments to an Expense Report, Receipt or Receipt draft in OpenAir Mobile](#)

 **Note:** You can also add attachments when you create an expense report or receipt. See [Creating an Expense Report](#).

- [Viewing Attachments](#)
- [Editing attachments](#)
- [Sharing Attachments](#)
- [Deleting Attachments](#)

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


## Adding Attachments to an Expense Report, Receipt or Receipt draft in OpenAir Mobile

You can add attachments to an expense report, receipt or receipt draft when you create a new expense report or receipt and at any time before you submit the expense report.




## To add attachments to an expense report, receipt or receipt draft in OpenAir Mobile:

1. Go to the expense report, receipt or receipt draft you want to add attachments to, and tap the Attachments tab.

For more information about the Attachments tab, see [Expense Attachments in OpenAir Mobile](#).

2. On the Attachments tab do one of the following:
  - Tap the camera icon  from the expense report toolbar to take a picture of a paper receipt for example.

**Note:** You have to allow access to the camera for the OpenAir Mobile app from your phone settings. Pictures you take with the camera on your device are automatically saved to your photo library in a 40% quality compressed format (JPG) with a maximum width/height of 2000 px. The attachment file size depends on the resolution of the camera on your device.

- Tap the gallery icon  to select one or multiple pictures from the library on your device. You can select multiple pictures from the library.
- Tap the cloud icon  (**iPhone**) and select one or multiple files stored on iCloud or other locations.
- Tap the file icon  (**Android**) to select one or multiple files stored on your phone or associated to another app.

**Note:** All the preceding options use native applications on your device. Refer to the vendor documentation for your device for information about steps to take the picture or select the files and return to OpenAir Mobile.

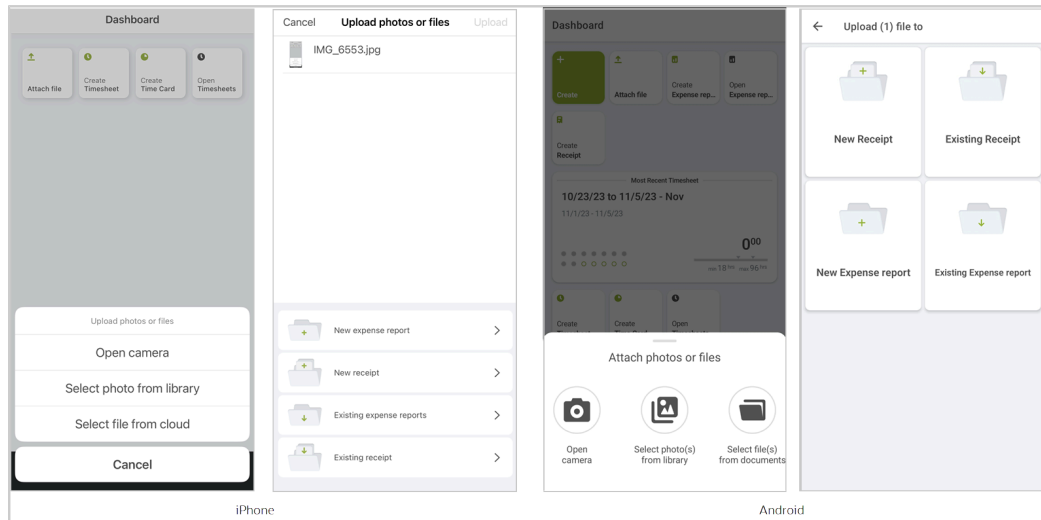
After you take the picture or select the files and return to OpenAir Mobile, OpenAir Mobile uploads the pictures or files. The Attachments tab includes the new picture or files. A spinning icon (**iPhone**) or progress bar (**Android**) shows the uploading progress for each attachment.




3. On the dashboard, tap the **Attach file** widget and choose the way you want to add the attachment photo or file, as mentioned in the above step. Then tap the option to add the attachment on a new receipt, expense report or existing receipt, expense report. See, [Navigating OpenAir Mobile](#).
4. After the attachments are uploaded, you can:
  - View the attachments – See [Viewing Attachments](#).
  - Edit the attachments – See [Editing attachments](#).
  - Share the attachments – See [Sharing Attachments](#).
  - Delete the attachments – See [Deleting Attachments](#).

## Adding Attachments from the OpenAir Mobile Dashboard

### To add attachments from the dashboard:

1. On the dashboard, click the **Attach file** widget.



2. Do one of the following:
  - Tap **Open camera (iPhone)** or the camera icon  (**Android**) to take a picture of a paper receipt for example.
  - Tap **Select photo from library (iPhone)** or the gallery icon  (**Android**) to select one or multiple pictures from the library on your device. You can select multiple pictures from the library.
  - Tap **Select file from cloud (iPhone)** and select one or multiple files stored on iCloud or other locations.
  - Tap the file icon  (**Android**) to select one or multiple files stored on your phone or associated to another app.
  - Tap **Cancel (iPhone)** to cancel the action and return to the dashboard.
3. After you select the attachment photo or file, tap:
  - **New expense report** — To add the attachment file to a new expense report.
  - **New receipt** — To add the attachment file to a new receipt.
  - **Existing expense report** — To add the attachment file to an existing expense report.
  - **Existing receipt** — To add the attachment file to an existing receipt.
4. Tap **Upload (iPhone)** or **Done (Android)** to add the attachment file.

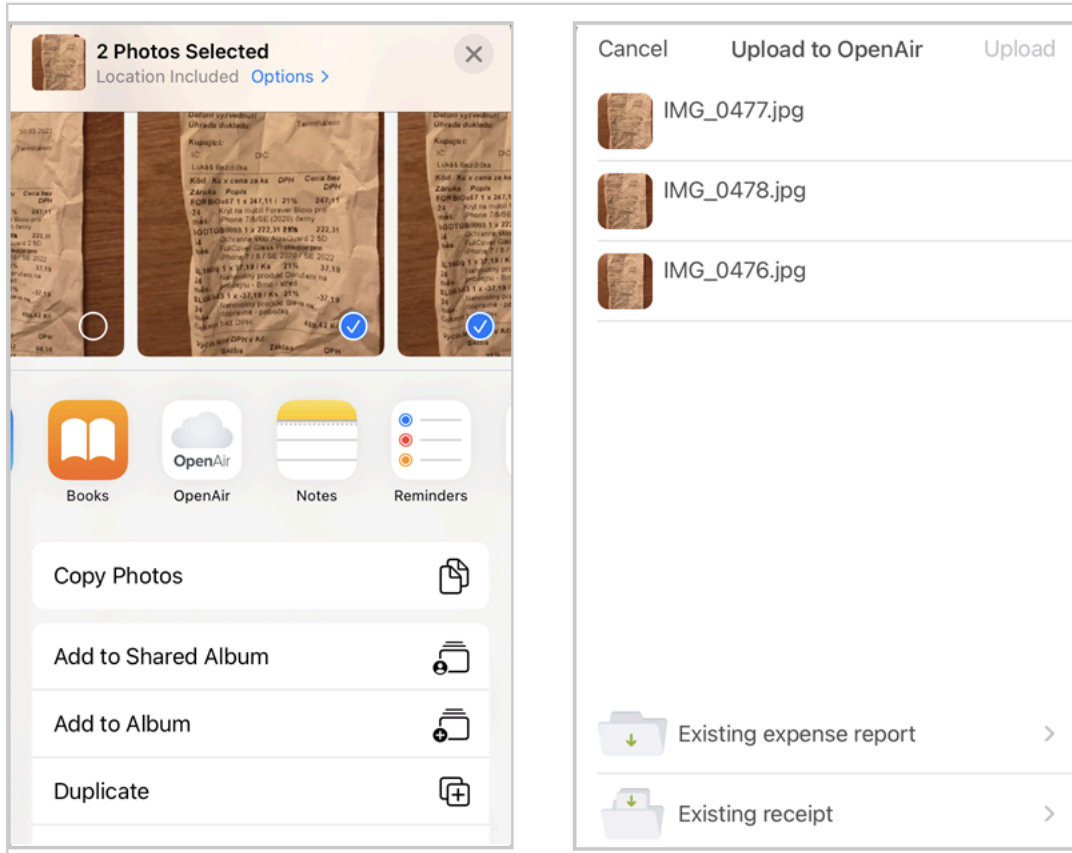
## Adding Attachments from Other Apps

You can add attachments to your expense reports and receipts directly from other apps using the share function on your device.

### To add attachments from other apps:

1. Go to the app or cloud service on your device.
2. Select the files you want to add as expense attachments in OpenAir Mobile.
3. Use the share function of the app on your device.
4. Select the OpenAir Mobile app.
  - a. Tap **Existing expense report** and select an expense report to add the attachment to an existing expense report.

- b. Tap **Existing receipt** and select a receipt to add the attachment to an existing receipt.
  - c. Tap **New Expense report** or **New Receipt in Existing Expense report(Android only)** to add the attachment to a new expense report or receipt and then tap **Done**.
5. Tap **Upload**.



## Viewing Attachments

You can see a thumbnail of the attachment file on the Attachment tab or you can get a full screen view of the attachment file.

### To view an attachment:

1. Thumbnails on the Attachments tab show a placeholder with the text "Tap to download" in place of the attachment preview if the file is not already stored on your device. Tap the placeholder to download the attachment file.


**Note:** On Android, downloaded attachment files are saved to the following location: My files > Images > OpenAir.

2. Tap a thumbnail to view the attachment in full screen view.
3. (Optional) Swipe right or left to view the previous or next attachment.
4. Tap **Done (iPhone)** or the Back button **←(Android)** to close the full screen view and return to the expense report or receipt.

## Editing attachments

You can edit image attachment to show only the relevant information, and to ensure optimal readability. OpenAir Mobile lets you rotate and crop images, and adjust the brightness and contrast.

### To edit an attachment:

1. On the Attachments tab, do one of the following:
  - On **iPhone**: Tap the more icon on the thumbnail  then tap **Edit**.
  - On **Android**: Tap the attachment then tap **Edit**.



 **Note:** For more information about the editing tools, see [Image Attachment Editing Tools](#).

2. Tap **Done** to save the changes and return to the Attachments tab or tap **Cancel** to cancel the operation.


## Sharing Attachments

You can export an attachment file to other applications on your device.

### To export an attachment:

1. On the Attachments tab, do one of the following:
  - On **iPhone**: Tap the more icon  and tap **Share**.
  - On **Android**: Tap the attachment you want to share and the export icon  on the toolbar.



### To send an attachment file to another app (iPhone only):

1. On the Attachments tab, tap the more icon  for the attachment you want to share. A context menu appears.
2. Tap **Share attachment**.
3. Choose an option for sending.

## Deleting Attachments


You delete attachments from an expense report or receipt at any time before you submit the expense report.

### To delete an attachment:

1. On the Attachments tab, do one of the following:
  - On **iPhone**, tap the more icon  and then tap **Delete**
  - On **Android**, tap the attachment and then tap the delete icon  from the toolbar.



A confirmation dialog appears.

2. Tap **Delete**.


 **Note:** You can tap **Cancel**, to cancel the operation at any time .

### To delete multiple attachments at the same time:

1. On the Attachments tab, do one of the following:
  - On **iPhone**, tap **Select**.
  - On **Android**, tap the select icon.
2. Tap the thumbnail for each attachment you want to delete. You can tap the thumbnail again to unselect the attachment.
 

The top bar (iPhone) or the select icon  (**Android**) shows the number of attachments selected.
3. Tap the delete icon  .
 

A confirmation dialog appears.
4. Tap **Delete**.

 **Note:** You can tap **Cancel**, to cancel the operation at any time .


## Submitting Expense Reports

You can submit open or rejected expense reports from the expense report screen.

After you submit an expense report, OpenAir Mobile sends the submitted expense report to OpenAir for validation.



If you submit the expense report successfully, the expense report disappears from the Open Expenses list and is now listed on the Submitted Expenses list.

- You can submit expense reports one at a time. If there are errors preventing the expense report from being submitted, the expense report is highlighted with a red outline on the Open Expenses list. See [Submitting an Expense Report](#)
- You can submit multiple expense reports for approval at the same time using the bulk-action mode. See

 **Note:** If some receipts in an expense report are rejected by the approver and the rest of the expense report is approved, OpenAir creates a new open expense report containing the rejected receipts. You can then make all necessary changes to the new expense report and submit it.

## Submitting an Expense Report

### To submit an expense report:

1. On the Open Expenses or Rejected Expenses list, tap the submit icon  in the expense report summary. See [Expenses Lists in OpenAir Mobile](#)
2. On the expense report screen, tap the submit icon  in the expense report toolbar. See [Expense Reports in OpenAir Mobile](#)

The Submit screen appears.





The screenshot shows a mobile application interface for submitting an expense report. At the top, there are three buttons: 'Cancel', 'Submit', and 'Done'. Below this is a summary card for 'Zibura Tech - May 2020' with the following details: 'Zibura Technologies | Data migration services', '7/26/21 - 8/1/21', and a total amount of '\$735.81'. There are also icons for a calendar, a pencil, and a speech bubble. Below the summary card is a section titled 'MAIN INFORMATION' containing two text input fields: 'Additional recipients' and 'Notes'.

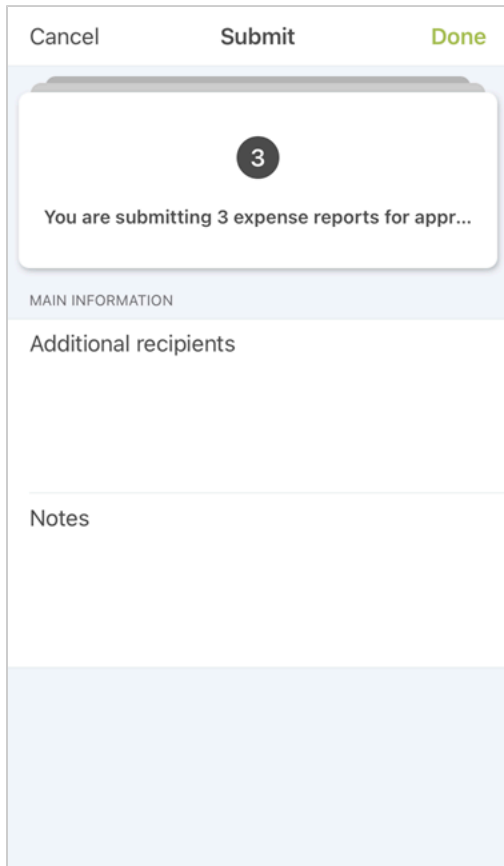
3. To send a copy of the submitted expense report notification to additional recipients, tap **Additional recipients** and enter additional email addresses (if required).
4. To add notes for the attention of the approver, tap **Notes** and enter some notes (if required).
5. Tap **Done (iPhone)** or **Submit (Android)** to submit the timesheet and return to the list.

## Submitting Multiple Expense Reports at the Same Time

You can submit multiple expense reports for approval at the same time using the bulk-action mode.

### To submit multiple expense reports at the same time:

1. On the Open Expenses or Rejected Expenses list, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Expenses Lists in OpenAir Mobile](#).
2. To select the expense reports you want to submit, tap each expense report summary one after the other. You can tap any selected expense reports again to unselect them.
3. Tap the submit icon  in the list toolbar. The Submit screen appears.
4. To send a copy of the submitted expense reports notification to additional recipients, tap **Additional recipients** and enter additional email addresses (if required).
5. To add notes for the attention of the approver, tap **Notes** and enter some notes (if required).
6. Tap **Done (iPhone)** or **Submit (Android)** to submit the selected expense reports and return to the list.



## Approving or Rejecting Expense Reports

If you manage other employees or approve their expense reports, you can use OpenAir Mobile to approve or reject the expense reports awaiting your approval.

**Note:** Your OpenAir account administrator must give you the relevant privileges to enable you to approve or reject expense reports using OpenAir Mobile.

To view the list of expense reports awaiting your approval, tap **To Approve** under Expenses in the navigation drawer. See [Navigating OpenAir Mobile](#).

- You can approve or reject expense reports one at a time. See [Approving or Rejecting an Expense Report](#).
- You can approve or reject multiple expense reports for approval at the same time using the bulk-action mode. See [Approving or Rejecting Multiple Expense Reports at the Same Time](#).
- You can reject selected receipts in an expense report and then approve the rest of the expense report. See [Rejecting Selected Receipts on an Expense Report](#)

## Approving or Rejecting an Expense Report

You can use OpenAir Mobile to approve or reject expense reports.

## To approve or reject an expense report:

- On the Expenses To Approve list do one of the following:
  - Tap the check mark icon ✓ or the reject icon ✗ in the expense report summary. See [Expenses Lists in OpenAir Mobile](#).
  - Tap the expense report summary to view the expense report screen, then tap the check mark icon ✓ or the reject icon ✗. See [Expense Reports in OpenAir Mobile](#).

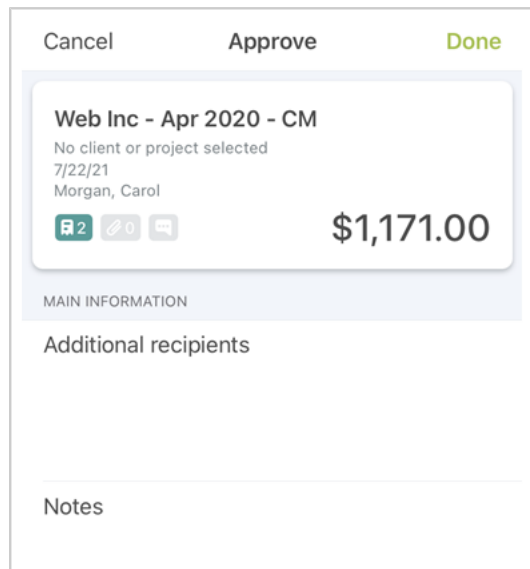
The screenshot shows a mobile application interface for approving an expense report. At the top, there are three buttons: 'Cancel', 'Approve', and 'Done'. The main content area displays the following information:

- Web Inc - Apr 2020 - CM**
- No client or project selected
- 7/15/21
- Morgan, Carol
- Amount: **\$1,171.00**

Below this summary, there is a section titled 'MAIN INFORMATION' which contains two input fields: 'Additional recipients' and 'Notes'.

The Approve screen or Reject screen appears.

- (Optional) To send a copy of the approved or rejected expense report notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
- To add notes for the attention of the employee who submitted the expense report, tap **Notes** and enter some notes. Notes are required when rejecting an expense report, optional when approving an expense report.






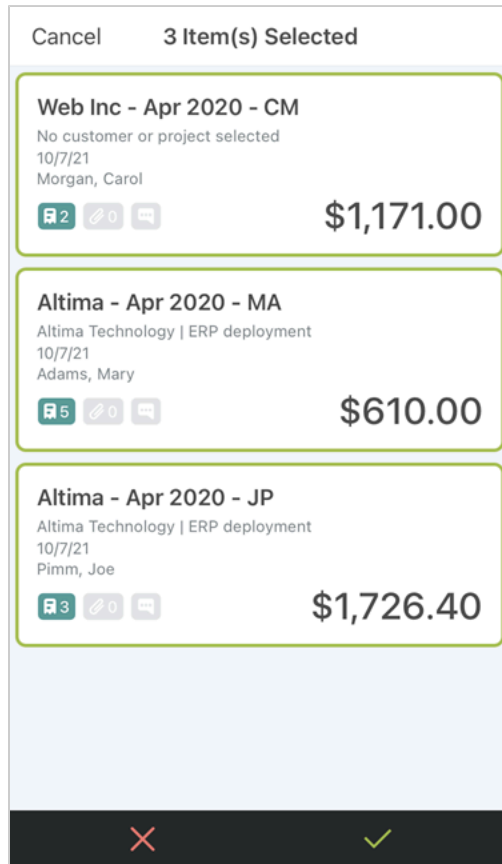
4. Tap **Done** (iPhone) or **Approve** or **Reject (Android)** to approve or reject the expense report and return to the list.

## Approving or Rejecting Multiple Expense Reports at the Same Time

You can approve or reject multiple expense reports at the same time using the bulk-action mode.

### To approve or reject multiple expense reports at the same time:

1. On the Expenses To Approve list, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Expenses Lists in OpenAir Mobile](#).
2. To select the expense reports you want to approve or reject, tap each expense report one after the other. Selected expense reports are indicated with a green color outline. You can tap any selected expense reports again to unselect them.
3. Tap the Approve  or reject icon  in the toolbar. The Approve screen or Reject screen appears.




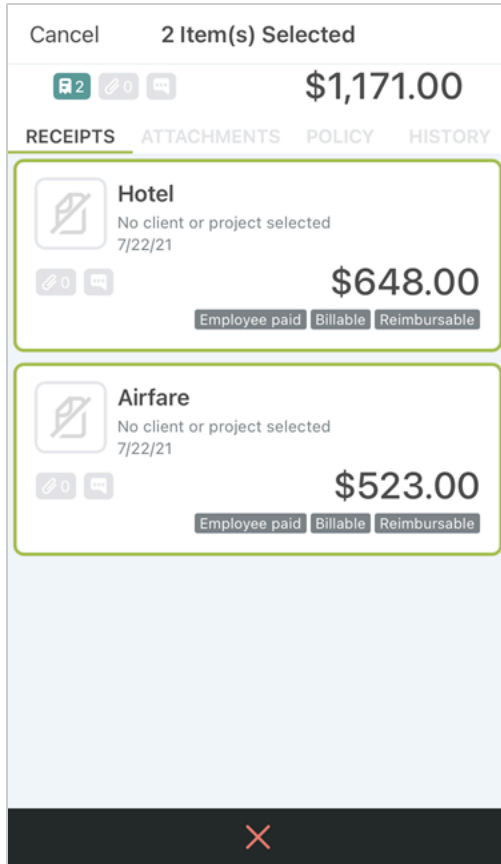
4. (Optional) To send a copy of the approved or rejected expense report notification to additional recipients, tap **Additional recipients** and enter additional email addresses.
5. To add notes for the attention of the employee who submitted the expense reports, tap **Notes** and enter some notes. Notes are required when rejecting an expense report, optional when approving an expense report.
6. Tap **Done** to approve or reject the selected expense reports and return to the list.

## Rejecting Selected Receipts on an Expense Report

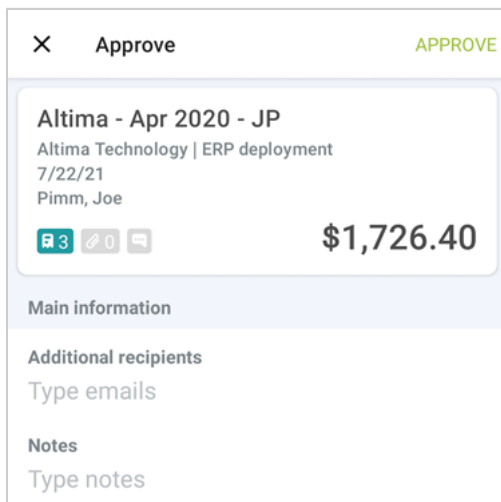
You can reject selected receipts in an expense report.

### To reject selected receipts on an expense report:

1. On the Expenses To Approve list, tap the expense report summary to view the expense report screen. See [Expenses Lists in OpenAir Mobile](#).
2. On the expense report screen, tap **Select (iPhone)** or the select icon  (**Android**) in the top right corner. See [Expense Reports in OpenAir Mobile](#).
3. To select the receipts you want to reject, tap each receipt one after the other. You can tap any selected receipts again to unselect them.



4. Tap the reject icon **X** in the toolbar. The Reject screen appears.
5. (Optional) To send a copy of the rejected receipts notification to additional recipients, tap **Additional recipients** and enter additional email addresses.



6. To add notes for the attention of the employee who submitted the expense report, tap **Notes (iPhone)** or **Reason (Android)** and enter some notes. Notes are required when rejecting a receipt.
7. Tap **Done (iPhone)** or **Reject (Android)** to reject the receipts and return to the expense report.

# OpenAir Mobile References






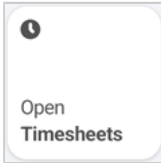
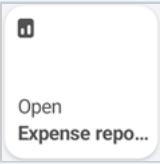
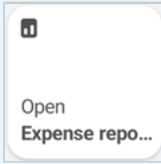
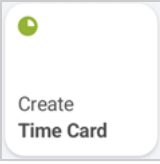
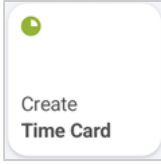
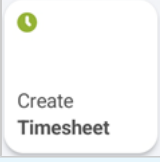
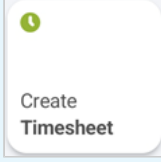
The following reference material is available:

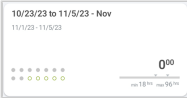





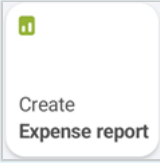
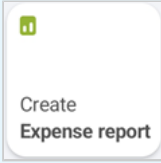




- [OpenAir Mobile Icons](#)
- [OpenAir Mobile Administration](#) — For account administrators
- [OpenAir Mobile FAQ](#)
- [OpenAir Mobile Troubleshooting](#)

## OpenAir Mobile Icons





This section describes the icons used in the OpenAir Mobile user interface.

### Navigation Drawer Icons































iPhone	Android	Description
		Settings — Tap to view the Settings screen and change your connection settings and sign-in details, to refresh all data or to view the app version and legal notices. See <a href="#">Configuring OpenAir Mobile</a> .
		Synchronize — Tap to synchronize your OpenAir Mobile data with the OpenAir server data manually before the next scheduled synchronization. See <a href="#">Synchronizing OpenAir Mobile with OpenAir</a> .
		<b>Open Timesheets</b> widget — This widget adds a shortcut to the dashboard, that navigates to the Open Timesheets list, where you can work with the available timesheets. See, <a href="#">Timesheets Lists in OpenAir Mobile</a> .
		<b>Open Expense report</b> widget — This widget adds a shortcut to the dashboard, that navigates to the Open Timesheets list, where you can work with the available expense reports. See, <a href="#">Expenses Lists in OpenAir Mobile</a> .
		<b>Create Time Card</b> widget — This widget adds a shortcut to the dashboard, that navigates to the New Time card form, where you can add a new time card to an existing timesheet. See, <a href="#">Adding a New Time Card</a> .
		<b>Create Timesheet</b> widget — This widget adds a shortcut to the dashboard, that navigates to the New Timesheet form, where you can create a new timesheet from blank. See, <a href="#">Creating a New Timesheet From Blank</a> .












iPhone	Android	Description
		<b>Most Recent Timesheet</b> widget — This widget adds a shortcut to the dashboard, that navigates to the summary of the most recent timesheet you created. See, <a href="#">Timesheets in OpenAir Mobile</a> .
		<b>Most Recent Expense Report</b> widget — This widget adds a shortcut to the dashboard, that navigates to the summary of the most recent expense report you created. See, <a href="#">Expense Reports in OpenAir Mobile</a> .
		<b>Create Receipt</b> widget — This widget adds a shortcut to the dashboard, that navigates to the New Receipt form, where you can add a new receipt to an existing expense report. See, <a href="#">Adding or Editing Receipts</a> .
		<b>Create Expense Report</b> widget — This widgets adds a shortcut to the dashboard, that navigates to the New Expense report form, where you can create a new expense report from blank. See, <a href="#">Creating an Expense Report From Blank</a> .
		<b>Create</b> widget — This widget adds a shortcut to the dashboard, that you can use to create a new timesheet, time card, expense report or receipt.
		<b>Attach file</b> widget — This widget adds a shortcut to the dashboard, that you can use to add an attachment photo or file to a new or existing receipt and a new or existing expense report. See, <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .













## Timesheets Icons

iPhone	Android	Description
		<b>Dashboard</b> — Tap to return to the dashboard ( <b>iPhone</b> ) or to show the navigation drawer ( <b>Android</b> ). See <a href="#">Timesheets Lists in OpenAir Mobile</a>
		<b>Select</b> — tap to select items and perform bulk actions on the selected items. The icon is located in the top bar. On <b>iPhone</b> , the top bar shows a Edit or Bulk link instead. See <a href="#">Bulk Actions in Timesheets Lists</a> and <a href="#">Timesheets in OpenAir Mobile</a> .































iPhone	Android	Description
		Cancel — tap to exit the bulk-action mode, the screen or the time entry form, and return to the previous screen. The icon is located in the top bar. On <b>iPhone</b> , the top bar shows a Cancel link instead. See <a href="#">Bulk Actions in Timesheets Lists</a> and <a href="#">Timesheets in OpenAir Mobile</a> .
		Back — tap to return to the previous screen. The icon is located in the top bar. On <b>iPhone</b> , the top bar shows a Back link instead. See <a href="#">Bulk Actions in Timesheets Lists</a> and <a href="#">Timesheets in OpenAir Mobile</a> .
		Day with time entries — A solid green dot in the timesheet summary calendar grid indicates a day with time entries. See <a href="#">Timesheet Summary in Lists</a> .
		Day without time entries— A green outline dot in the timesheet summary calendar grid indicates a day for which you can record time entries. See <a href="#">Timesheet Summary in Lists</a> .
		Day with time entries — A solid gray dot in the timesheet summary calendar grid indicates a day which is not in the timesheet period and for which you cannot record time entries. See <a href="#">Timesheet Summary in Lists</a> .
		Add — Tap to add a new timesheet or a new time card. The icon is located in the bottom toolbar. See <a href="#">Creating a Timesheet</a> and <a href="#">Adding a New Time Card</a> .
		Clone — Tap to create a copy of a timesheet or a time card. The icon can be located in the bottom toolbar, context menus or on the timesheet summary. See <a href="#">Copying an Existing Timesheet</a> and <a href="#">Copying an Existing Time Card</a> .
		
		Edit / View Properties — Tap to edit or view the properties of a timesheet or a time card. The icon is located in the bottom toolbar or context menus. See <a href="#">Editing Timesheet Properties</a> and <a href="#">Editing Time Card Properties</a> .
		
		Delete or Delete (Bulk-Action) — Tap to delete one or multiple timesheet(s), time card(s) or time entry(ies). The icon is located in the bottom toolbar, context menus or on the time entry form. See <a href="#">Deleting Timesheets</a> , <a href="#">Deleting a Time Card</a> and <a href="#">Deleting Time Entries</a> .
		
		More Options — Tap to view a context menu with additional options. The icon is located on the timesheet summary or on the time card. Additional options include Clone, Edit/View and Delete.
		Submit or Submit (Bulk-Action) — Tap to submit one or multiple timesheet(s). The icon is located on the bottom toolbar or on the timesheet summary. See <a href="#">Submitting Timesheets</a> .
		
		













iPhone	Android	Description
		Approve or Approve (Bulk-Action) — Tap to approve one or multiple timesheet(s). The icon is located on the bottom toolbar or on the timesheet summary. See <a href="#">Approving or Rejecting Timesheets</a> .
		<div style="border: 1px solid #0070C0; padding: 5px;"> <p> <b>Note:</b> The green check mark icon is also used in timesheets and time card property selection screens to show the current field value.</p> </div>
		Reject or Reject (Bulk-Action) — Tap to reject one or multiple timesheet(s) or time entry(ies). The icon is located on the bottom toolbar or on the timesheet summary. See <a href="#">Approving or Rejecting Timesheets</a> .
		History — Tap to view the submission and approval history and any submission or synchronization errors for the timesheet. The red color dot appears on <b>iPhone</b> if there are any errors. The icon is located in the bottom toolbar. See <a href="#">Timesheet History and Timesheet Errors</a> .
		
		Empty Time Entry Cell (Week Days) — Tap the cell to add a time entry. See <a href="#">Adding or Editing Time Entries</a> .
		Empty Time Entry Cell (Weekend) — Tap the cell to add a time entry. See <a href="#">Adding or Editing Time Entries</a> .
		Empty Time Entry Cell (Disabled) — You cannot add a time entry on that day in this time card or timesheet. See <a href="#">Adding or Editing Time Entries</a> .
		Time Entry Notes Exist — The time entry includes notes. Tap the cell to edit the time entry. See <a href="#">Adding or Editing Time Entries</a> .
		Selected Time Entry Cell — The time entry cell is selected for editing. Any time values, add or notes icon appears in inverted color. See <a href="#">Adding or Editing Time Entries</a> .
		Selected Time Entry Cell with Error — The time entry cell is selected for editing and there is an error. Any time values, add or notes icon appears in inverted color. See <a href="#">Adding or Editing Time Entries</a> .
		Selected Time Entry Cell (Bulk-Edit) — The time entry cell is selected for editing. See <a href="#">Adding or Editing Time Entries</a> .

iPhone	Android	Description
		Selected Time Entry Cell with Error (Bulk-Edit) — The time entry cell is selected for editing and there is an error. See <a href="#">Adding or Editing Time Entries</a> .
		Modified but Not Selected Time Entry Cell with Error (Bulk-Edit) — The time entry cell was added or modified, it is not selected for editing and there is an error. See <a href="#">Adding or Editing Time Entries</a> .
 	 	Add or Subtract One Hour — On the time entry form, on the Time tab, tap these icons to add or subtract one hour to the current value. Use these icons to record time of 10 hours or more. See <a href="#">Adding or Editing Time Entries</a> .
		Positive / Negative — On the time entry form, on the Time tab, tap to change the time entry to a negative or positive value. See <a href="#">Adding or Editing Time Entries</a> .
		Error — On the time entry form, the red color dot indicate a tab which includes an error. See <a href="#">Adding or Editing Time Entries</a> .

## Expenses Icons

iPhone	Android	Description
		Navigation drawer— Tap to view the navigation drawer. The icon is located in the top bar. See <a href="#">Expenses Lists in OpenAir Mobile</a> .
		Add — Tap to add a new expense report or a new receipt. The icon is located in the toolbar ( <b>iPhone</b> ) or the bottom right corner ( <b>Android</b> ). See <a href="#">Creating an Expense Report</a> and <a href="#">Adding or Editing Receipts</a> .
Select		Select (Bulk Actions)— Tap to enter the edit mode and delete expense reports or delete or reject receipts. The icon is located in the top bar. On <b>iPhone</b> , the top bar shows a Select link instead. See <a href="#">Expenses Lists in OpenAir Mobile</a> , and <a href="#">Expense Reports in OpenAir Mobile</a> .
—		Cancel — Tap to exit the edit mode or the screen and return to the previous screen. The icon is located in the top bar. On <b>iPhone</b> , the top bar shows a Cancel link instead. See <a href="#">Expenses Lists in OpenAir Mobile</a> , and <a href="#">Expense Reports in OpenAir Mobile</a> .
<		Back — tap to return to the previous screen. The icon is located in the top bar. See <a href="#">Expenses Lists in OpenAir Mobile</a> , and <a href="#">Expense Reports in OpenAir Mobile</a> .
		Delete — Tap to show a Delete button. See <a href="#">Deleting Expense Reports</a> and <a href="#">Deleting Receipts</a> .

iPhone	Android	Description
		Download all attachment — Tap to download all attachments to an expense report and save on your device. The icon is located in the bottom toolbar. See.
		Clone — Tap to create a copy of an expense report. The icon can be located in the bottom toolbar. See and <a href="#">Copying an Existing Time Card</a> .
		More Options icon — Tap to select any of the following options: edit image, view attachment, share attachment, delete attachment. On <b>Android</b> , the options are located in the bottom toolbar. See, <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>
		The total number of attachments — You can view the total number of attachments across all receipts in the expense report from the Expense Report and Receipt Summary. See, <a href="#">Receipts in OpenAir Mobile</a> .
		Total number of receipts — You can view the total number of receipts from the Expense Report and Receipt Summary. See, <a href="#">Receipts in OpenAir Mobile</a> .
		Notes — You can view the notes
		Approve or Approve (Bulk-Action) — Tap to approve one or multiple expense report(s). The icon is located on the bottom toolbar or on the expense report summary. See <a href="#">Approving or Rejecting an Expense Report</a> .
<div style="border: 1px solid #add8e6; padding: 5px;"> <b>Note:</b> The green check mark icon is also used in expense reports and receipts property selection screens to show the current field value.</div>		
		Reject or Reject (Bulk-Action) — Tap to reject one or multiple expense report(s) or receipt(s). The icon is located on the bottom toolbar or on the expense report summary. See <a href="#">Approving or Rejecting an Expense Report</a> .
		Camera — On <b>iPhone</b> , tap to view the context menu letting you take a photo or import an existing file. On <b>Android</b> , tap to take a photo using the camera on your device. The icon is located in the bottom toolbar on the attachments screen. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .
		Gallery— Tap to import a picture on the Gallery or Photos library on your device. The icon is located in the bottom toolbar on the attachments screen. . See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .
		File — On <b>Android</b> , tap to import a file stored on your device or associated with another app installed on your device. The icon is located in the bottom toolbar on the attachments screen. On <b>iPhone</b> , tap to import a file from iCloud. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .

iPhone	Android	Description
—		Export — Tap to export the attachment to another app or location. The icon is located in the bottom toolbar when viewing an attachment. On <b>iPhone</b> , tap the Share attachment option from the thumbnail. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .
	—	Auto Adjust (Edit Attachment)— Tap the auto adjust icon to automatically adjust the brightness and contrast of the image ( <b>iPhone</b> ). See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .
		Brightness icon (Edit Attachment)- Tap the to adjust the brightness of the image. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a> .
		Resize icon (Edit Attachment)— On <b>Android</b> tap the crop icon to adjust the size of the image. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>
		Right rotation icon (Edit Attachment) —Tap the right rotation icon to rotate the image to the right. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>
		Left rotation icon (Edit Attachment) — Tap the left rotation icon to rotate the image to the left. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>
—		Flip left/right icon (Edit Attachment) — On <b>Android</b> tap the flip icon to flip the image left to right and the opposite. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>
—		Flip upside/down icon (Edit Attachment)- On <b>Android</b> tap the flip icon to flip the image upside/down and the opposite. See <a href="#">Working with Image Attachments on Expense Reports Receipts and Receipt drafts</a>

# OpenAir Mobile Administration

OpenAir Mobile services must be enabled for your account to access your OpenAir data using OpenAir Mobile for iPhone or Android.

**Note:** To enable OpenAir Mobile services for your account, contact your OpenAir account manager.

If OpenAir Mobile services are enabled for the account, authorized employees can use OpenAir Mobile to connect to your company's OpenAir account and work with Timesheets and Expenses. See [Supported Authentication Mechanisms](#).

Account administrators control who can access OpenAir Mobile and what employees can do with OpenAir Mobile. See [Access Control](#).


## Supported Authentication Mechanisms

Authentication ensures that only authorized individuals get access to the OpenAir data using OpenAir Mobile. See [Connecting OpenAir Mobile to Your OpenAir Account](#).


OpenAir Mobile uses the OAuth 2.0 authorization framework to access OpenAir data. Users authorize access by signing in to OpenAir sign-in page on their mobile browser. The OpenAir sign-in page was redesigned and adapted for mobile devices, and users can use biometric authentication if enabled on their device.

OAuth 2.0 supports the following authentication mechanisms:

- Password Authentication by OpenAir — Employees use their OpenAir credentials (company ID, username and password) to connect OpenAir Mobile to OpenAir.
- SAML Authentication — If SAML authentication is enabled for your account, you can enable to sign in using one of the following methods:
  - Service provider initiated single sign-on (SP-initiated SSO).
  - Identity provider initiated single sign-on (IdP-initiated SSO). Users need to close the OpenAir Mobile application and launch OpenAir from their company SSO page before they can access OpenAir Mobile.

For more information about configuring and using SAML Authentication, see the  [OpenAir SAML Single Sign-On](#).

If you use the IP Restriction optional feature to restrict access to the OpenAir account to specific IP addresses, the IP address of the user's device must be in the IP address allowlist for this user for OpenAir Mobile to exchange information with your company's OpenAir account. If the IP address changes and the new IP address is not in the IP address allowlist for the user, the OpenAir Mobile app can no longer exchange information with your company's OpenAir account. The OAuth 2.0 access and refresh tokens become invalid at the first attempt to exchange information with your company's OpenAir account, when the user saves changes or runs the synchronization manually. OpenAir Mobile 4.4.2 or later version shows an error message. Previous versions of the app initiate the authorization process without error message. The user must ensure that the device IP address is authorized before connecting OpenAir Mobile again with your company's OpenAir account.

For more information about configuring and using authentication, see  [Security](#).

## Access Control

Account administrators control who can access OpenAir data using OpenAir Mobile, whether the Timesheets and Expenses module are available for mobile users across the OpenAir account, who can approve or reject items using OpenAir Mobile and what employees can do using OpenAir Mobile.

The following topics describe the configuration required to let employees access OpenAir Mobile:

- [Granting Exchange Access](#) — Control who can connect OpenAir Mobile to OpenAir.
- [Granting Application Access](#) — Control whether your employees can use Timesheets, Expenses, or both modules in OpenAir Mobile.
- [Enabling Employees to View and Approve Items Awaiting Approval](#)
- [Roles and Form Permissions](#) — OpenAir Mobile uses the same role and form permission controls as OpenAir.
- [Timesheet Rules and Split Timesheets at Month End](#) — Timesheet rule guidelines apply when your company's OpenAir account is configured to split timesheets automatically at month end.

## Granting Exchange Access

To enable employees to work with timesheets or expenses using OpenAir Mobile, account administrators must grant each employee the relevant exchange access on the Employee record. Exchange access is required to authorize any data exchange between OpenAir and the client application — OpenAir Mobile, in this instance. Without the relevant exchange access, employees may download app but will not be able to connect the app to OpenAir using their user credentials.

### To grant an employee exchange access for OpenAir Mobile:

1. Go to Administration > Global Settings > Users > Employees > [Select an Employee] > Access Control > Exchange Access.

The Exchange Access form appears.

The screenshot shows the 'Exchange Access' form. It features two columns: 'Available' and 'Selected'. The 'Available' column lists the following items: OpenAir OffLine, OpenAir Projects Connector, QuickBooks Import/Export, Peachtree Import/Export, OpenAir Outlook Connector, OpenAir Mobile (iPhone), OpenAir Mobile (Android), and Integration Manager. The 'Selected' column lists: OpenAir OffLine, OpenAir Projects Connector, OpenAir Outlook Connector, OpenAir Mobile (iPhone), and OpenAir Mobile (Android). The 'OpenAir Mobile (iPhone)' and 'OpenAir Mobile (Android)' items in the 'Selected' column are highlighted with a red box. Below the 'Available' column are buttons for 'Add selected >' and 'Add all >'. Below the 'Selected' column are buttons for '< Remove selected' and '< Remove all'. At the bottom of the form are 'Cancel' and 'Save' buttons.

2. In the Available column, select OpenAir Mobile (iPhone), OpenAir Mobile (Android), or both, and click **Add selected**.
3. Click **Save**.

✓ **Tip:** You can use the bulk employee change wizard to copy the Exchange Access settings to other employee records in your company's OpenAir account.

See [Administrator Guide](#) under Home > Home > Wizards > Making Changes to Multiple Employee Records at the Same Time.

## Granting Application Access

Employees who have access to the Timesheets or Expenses applications in OpenAir also have access to Timesheets or Expenses in OpenAir Mobile by default if they can connect the app with OpenAir. See [Granting Exchange Access](#).

Access to Timesheets and Expenses can be disabled separately for mobile applications across the OpenAir account. For example, if you want to let employees work with timesheets using OpenAir Mobile and ensure they use the OpenAir web application for Expenses, you can disable access to Expenses on OpenAir Mobile for all employees.

To disable access to Timesheets or Expenses on OpenAir Mobile, contact OpenAir Customer Support and ask for the **Disable Timesheets on Mobile apps** or **Disable Expenses on Mobile apps** internal setting. See [Contacting OpenAir Customer Support](#).

## Enabling Employees to View and Approve Items Awaiting Approval

Account administrators can enable or disable access to the Timesheets or Expenses “To Approve” lists and the timesheets or expenses approval functionality in the Employee Demographic form.

### To enable an employee to view and approve items awaiting approval:

1. Go to Administration > Global Settings > Users > Employees > [Select an Employee] > Demographic.
2. To enable an employee to view and approve timesheets awaiting approval, scroll down to the Timesheet Options section of the form and check the **Enable Approval on mobile for Timesheets**.
3. To enable an employee to view and approve expense reports awaiting approval, scroll down to the Expenses Options section of the form and check the **Enable Approval on mobile for Expenses**.
4. Click **Save**.

**Note:** These settings are also available in the employee’s personal settings. To enable or disable the “To Approve” lists and the approval functionality, go to User Menu > Personal Settings and check the **Enable Approval on mobile for Timesheets** or **Enable Approval on mobile for Expenses** box. For example, if you are not an approver, you may want to exclude the To Approve lines from the app dashboard.

Account administrators can hide or disable these options on the Personal Settings form using Form permissions.

## Scripting and OpenAir Mobile

OpenAir Mobile 4.0 or later version supports:

- All form scripts associated with the expense report and receipt entity forms.
- "Before approval" and "After approval" scripts associated with the timesheet entity form.

**Note:** “On submit,” “Before save,” or “After save” scripts associated with the timesheet entity form are not supported.

For an example of script that is executed both in OpenAir and OpenAir Mobile, see [User Scripting](#).

## Roles and Form Permissions

Role permissions, form permissions and permission rules defined in OpenAir by account administrators are also enforced in OpenAir Mobile.

However, note that for Timesheets, only permission rules and form default values for the main entity form are supported. Permission rules and form default values for the time entry form are not supported.

For more information about role permissions, form permissions and other access control settings, see [Administrator Guide](#) and [Security](#).




## Timesheet Rules and Split Timesheets at Month End

OpenAir Mobile supports the optional feature “Automatically create overlapping timesheets” in OpenAir. If the feature is enabled for your account, OpenAir Mobile split weekly or bi-weekly timesheets automatically at month end. See [Linked Split-Week Timesheets](#).

If timesheets are split at month end for your account, note the following timesheet rules guidelines:

- **Minimum number of hours required on the timesheet** should be disabled or **Hours/Percent** set to “Percent of work schedule”.
- **Maximum number of hours allowed on the timesheet** should be disabled or **Hours/Percent** set to “Percent of work schedule”.

If either of these timesheet rule is enabled, Timesheet summaries and detail views in OpenAir Mobile show a visual representation of time entered on the timesheet as well as a reminder of the minimum required on timesheet and maximum allowed on timesheet. If **Hours/Percent** is set to “Fixed hours” Timesheets split at month end include the minimum required and maximum allowed for a complete timesheet period. This may cause unnecessary confusion for your OpenAir Mobile users.

 **Note:** To review and set timesheet rules in OpenAir, go to Administration > Application Settings > Timesheets > Timesheet rules.

## OpenAir Mobile FAQ

### How does my mobile device communicate with my company's OpenAir Account?

When your device is connected to the internet, it communicates with your company's OpenAir account and exchanges information in both directions. Any changes you make using the mobile app are sent to the OpenAir server and conversely any changes on the OpenAir server are sent to your mobile device.

For more information, see [Synchronizing OpenAir Mobile with OpenAir](#)

### I had to change my password in my company's OpenAir account. Do I need to change it in OpenAir Mobile?

You enter the same sign-in details (company ID, user ID and password) when you connect OpenAir Mobile to your company's OpenAir account as when you sign in to OpenAir. See [Connecting OpenAir Mobile to Your OpenAir Account](#).

### What should I do if data is missing from OpenAir Mobile on my device?

Note that approved items data in OpenAir is limited to optimize storage space on your device and performance:

- The list shows only timesheets or expense reports for periods within the last two years. The dashboard indicates the total number of items per status in OpenAir but you can only view items for the last two years using OpenAir Mobile.
- The Approved timesheets or expense reports list shows up to a maximum of 10 items. The dashboard indicates the total number of approved items in OpenAir but you can only view the 10 most recent approved items using OpenAir Mobile.

If you cannot find the data you are looking for, you can trigger a full synchronization manually using the **Refresh all data** on the Settings screen. See [Synchronizing OpenAir Mobile with OpenAir](#).

### Why do I keep seeing a synchronization message?

OpenAir Mobile synchronizes data automatically with your company's OpenAir account to ensure that you are viewing and updating the latest data. See [Synchronizing OpenAir Mobile with OpenAir](#).

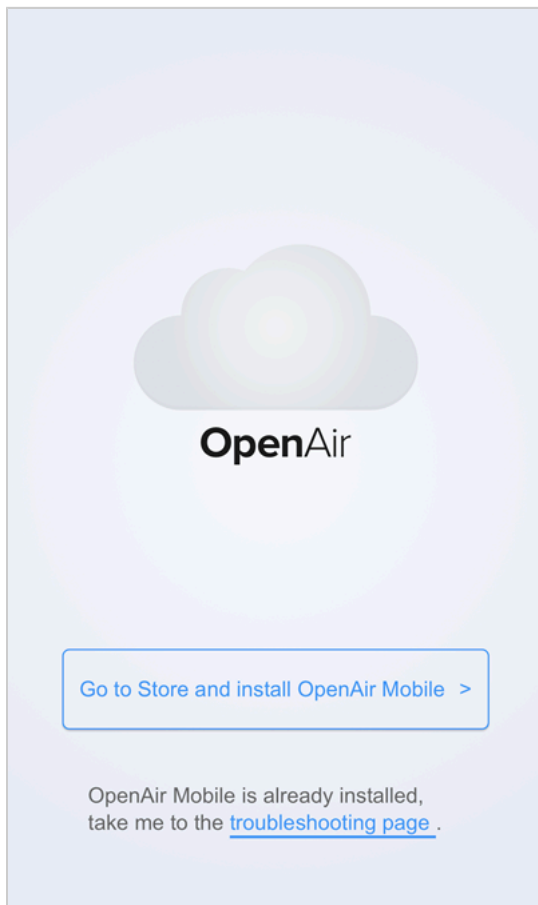
# OpenAir Mobile Troubleshooting

This section describes common problems and their solutions. If the solutions below or your account administrator cannot resolve the problem, contact OpenAir Customer Support. See [Contacting OpenAir Customer Support](#).

OpenAir Mobile is installed on my iPhone but the “Go to Store and install OpenAir Mobile” screen keeps showing

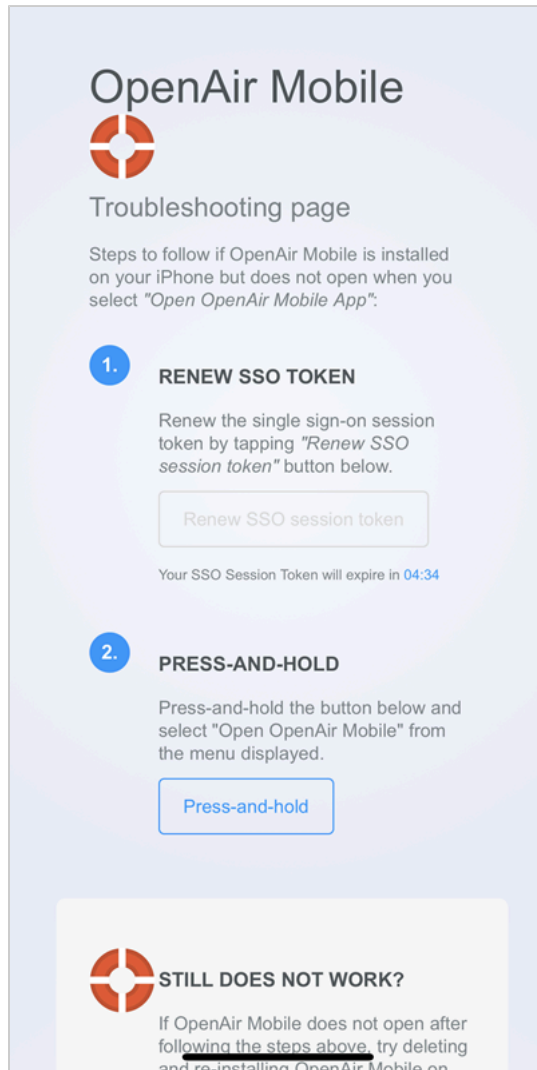
OpenAir Mobile should launch automatically after you sign in and launch the OpenAir web application using identity provider initiated single sign-on if OpenAir Mobile 3.0 or later is installed and OpenAir Mobile is your preferred application. See [Setting Your Preferred Application](#).

A known limitation on iOS devices takes into account your previous interactions with the web application and prevents the native application from launching in some cases. OpenAir Mobile fails to launch and the **Go to Store and install OpenAir Mobile** appears instead after you sign in to the OpenAir web application using IdP-initiated single sign-on. You can force OpenAir Mobile to open.

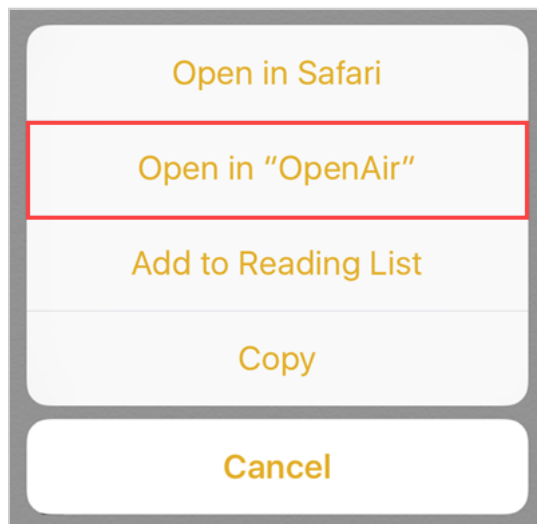


## To open OpenAir Mobile when it fails to open automatically after sign in:

1. In the **Go to Store and install OpenAir Mobile** screen, tap the **troubleshooting page** link. The troubleshooting page appears.
2. Tap **Renew SSO session token**. This will renew the single sign-on session token and give you 5 minutes to open OpenAir Mobile.



- Press-and-hold the **Press-and-hold** button on the troubleshooting page. A context menu appears.




4. Tap **Open in "OpenAir"**. OpenAir Mobile should open.
5. If OpenAir Mobile does not open, follow the additional steps described on the troubleshooting page.
6. If you are still having difficulties opening OpenAir Mobile, contact OpenAir Customer Support. See [Contacting OpenAir Customer Support](#)

## Contacting OpenAir Customer Support


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

### To create a support case:

1. Sign in to your company's OpenAir account and select **Support** from the user 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 (if you want to contact OpenAir Customer Support to enable a feature, for example), click **Search**.

5. The search results often include an answer to your question. 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.