

## Changepoint SA 2020 Mobile App Quick Start Guide

The Changepoint mobile app provides convenient access to commonly-used features that can be acted on using a smartphone or tablet.

You can use the mobile app even if an internet connection is not available or is lost during a session. When the connection is reestablished, the data in the mobile app is automatically uploaded to Changepoint.

### Installing and accessing the Changepoint mobile app

Download the mobile app from the app store for your mobile device.

To sign in to Changepoint using the mobile app, you require the following information:


- Changepoint URL
- user ID and password for signing into Changepoint

### Using the Changepoint mobile app


Tap the menu icon  to view the features.


**Note:** Only the features that you have access rights to appear.


 Time sheet

 Time approval

 Expenses

 Expense reports

 Expense approval

 Notifications

 Settings

 Sign out

## Configuring the Changepoint mobile app

In the  **Settings** screen, you can specify the following mobile app settings.

### Changing the default start screen

By default, the time sheet is the start screen but you can change it to any of the other screens.


### Selecting preferred currencies

You can select the currencies that you use most frequently for reporting expenses.

### Refreshing the application data

You can refresh the data in the mobile app to include the most recent changes from Changepoint.

## Viewing Changepoint information

In the  **Settings** screen, you can view the following Changepoint and mobile app information:



- Changepoint URL
- mobile app version
- Changepoint version
- API version
- open source licenses
- log file




## Entering time using the Changepoint mobile app

When you first access the time sheet, the existing time entries and pinned tasks for the current week are displayed. To view only the time entries for a specific day, tap the day.


Submitted time entries have a gray bar on the left side. The bar changes to green when the time entry is approved or red if the time entry is rejected.

### Entering a time entry


1. In the  **Time sheet** screen, tap the edit icon .

2. Select a task from the list that appears.
3. Enter the time and complete the other fields as required.
4. To pin a task or request to / unpin a task or request from the time sheet, swipe right and then tap .
5. To view and edit additional fields, click .
6. To save, click .

#### Editing a time entry

1. Tap the time entry.
2. Make the required changes and then click .

#### Deleting a time entry





Swipe left on the time entry and then tap .

#### To submit time entries



Tap .

## Managing expenses using the Changepoint mobile app








### Creating an expense entry

1. Tap the menu icon  > **Expenses**.
2. Click the edit icon .
3. Complete the fields.
4. You can attach a file or photo that is stored on your device to the expense record or take a photo and attach it. Tap  to save the attachment.
5. To delete an attachment, swipe left on the attachment.
6. To save the expense, tap .




## Accessing expense reports

1. In the  **Expense reports** screen, the draft expense reports are listed.
2. To view expense reports in other statuses, tap  and then tap the status.

## Creating an expense report


1. In the  **Expense reports** screen, tap the edit icon .
2. Select the contract/initiative related to the expenses.
3. Tap the expense records to be added to the report and then tap .
4. To add an attachment to the expense report, click .
5. To add another expense, tap the edit icon .
6. To remove an expense:
  - a. Tap the **Expenses** tab.
  - b. Swipe left on the expense.
7. To save the expense report, tap .
8. To submit the expense report, tap .

## Approving time using the Changepoint mobile app



1. Tap the menu icon  > **Time approvals**.
2. To approve / reject all time entries for a resource, swipe right / left on the resource.
3. To view a list of the time entries for a resource, tap the resource.
4. To approve / reject a time entry, swipe right / left on the time entry.
5. To view details for a time entry:
  - a. Tap the time entry.
  - b. To approve / reject the time entry, tap approve  / reject .

## Approving expenses using the Changepoint mobile app


In addition to approving or rejecting an expense report, you can view expense details and reject some but not all expense records in an expense report.

1. Tap the menu icon  > **Expense approvals**.
2. To approve / reject an expense report, swipe right / left on the expense report.

**Note:** When you reject an expense report, the expenses in the report become available in the expense list of the user who submitted them for update and are marked with a red bar.

3. To view expense report details, tap the expense report and then tap the corresponding tabs (**Details**, **Expenses**, **Accounts**, **Attachments**).
4. To view the details of an expense record, in the **Expenses** tab, tap the expense.
5. To reject some of the expenses in the report:
  - a. Long-press any expense to display the reject view.
  - b. Tap to select the expenses that you want to reject, and then tap **Reject**.
6. To approve all / reject all expense records, tap tap approve  / reject .

## Notifications

You can view notifications in the  **Notifications** screen. You can act on the notifications from the screen, except for request notifications, which must be addressed in Changepoint.

