

# On the Go Time Manual

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## CONTENTS

<b>Clause</b>	<b>Heading</b>	<b>Page</b>
1	OVERVIEW .....	1
2	VIEWS.....	1
	2.1 Navigation Bar .....	1
	2.2 Entries View.....	2
	2.3 Statuses.....	2
	2.4 Timers View.....	3
	2.5 Matters View.....	4
	2.6 Totals View .....	5
3	TIME CARD.....	6
4	ADDITIONAL FEATURES.....	7
5	HELP AND SUPPORT .....	7

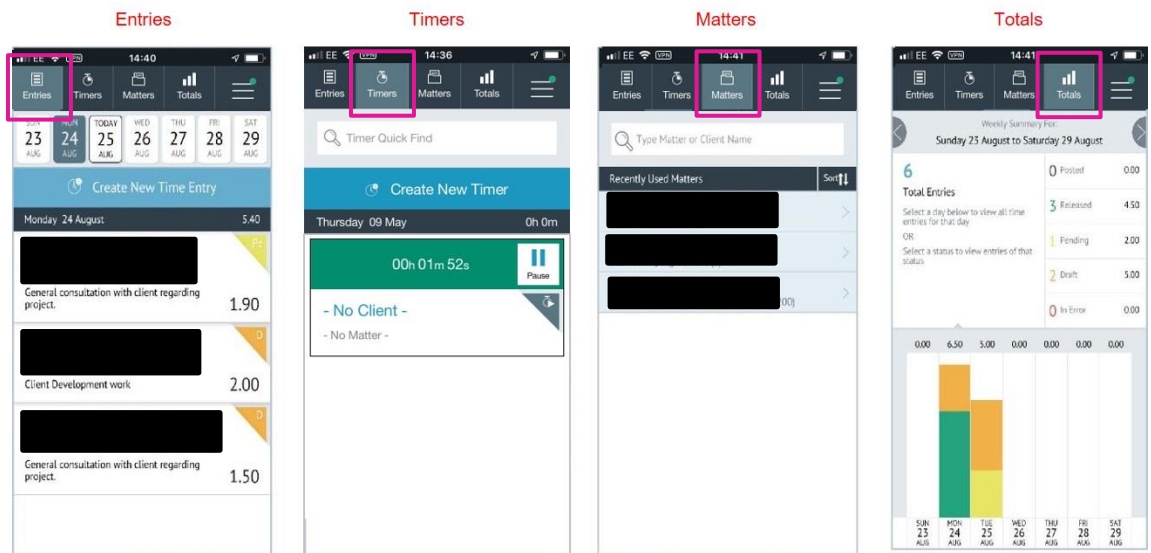
## 1 OVERVIEW

On The Go Time is an app to create, save and submit time entries when you are out of the office without having to use your Surface Book. It can be found in the 'Apps at Work' folder on your iPhone. Once installed you just need to add your Burges Salmon user name and password which will not need to be added again until it is next changed.

The iPhone doesn't have the same functionality as Expert Time so we do not recommend that you use the app as your main source for recording time, this is a way of capturing time quickly when you are out of the office. This could be whilst travelling, working from home, when your Surface Book is unavailable or working from a location with limited connectivity.

## 2 VIEWS

On The Go Time has four views, **Entries**, **Timers**, **Matters** and **Totals**. Each of these views displays a Navigation Bar and Main Pane. Details of Entries, Timers, Matters and Totals are shown below:



### 2.1 Navigation Bar

The navigation bar allows you to navigate through On the Go Time and enables you to save and submit time entries.

You can access the views by tapping any of the options.

Tapping the three lines on the right displays a **menu of options** for On the Go Time.



The **green dot** shows that you are currently online. If you are offline, the dot will be red. If a Wi-Fi or 3G connection cannot be established on the device, the application will automatically work offline and will sync once you are back online.

## 2.2 Entries View

The Entries view has several important features:

- Calendar days
- Create New Time Entry
- List of time entries by date

If you prefer to view and create your time entries by the day, then this view is the best view to use.

### Calendar Days

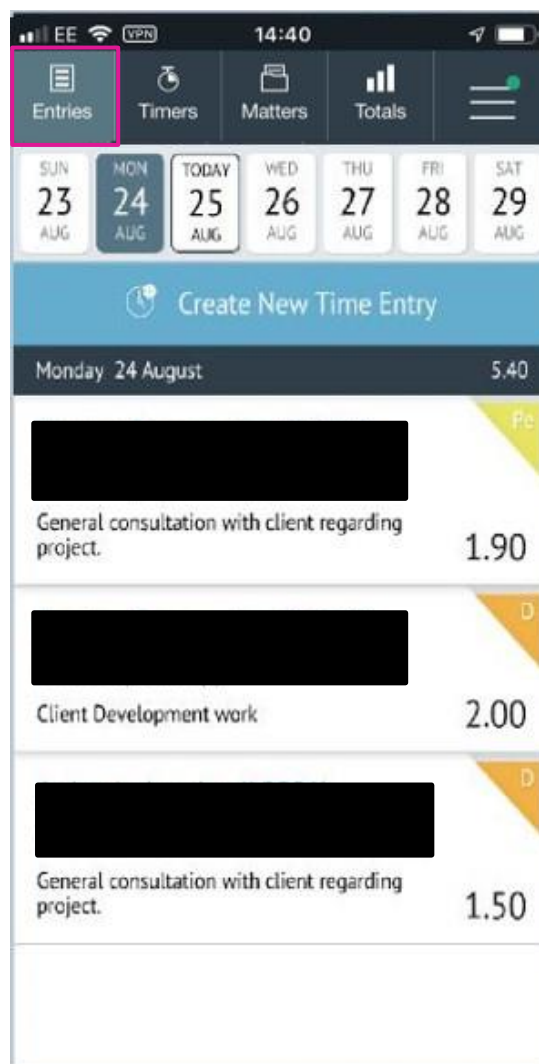
- It will default to today when first opened.
- Tap different days to view the entries for that day.
- Swipe left or right to move between weeks.

### Create New Time Entry

- This button will open a new time card for entering time.
- It will default the chosen day into the Date field of the time card.

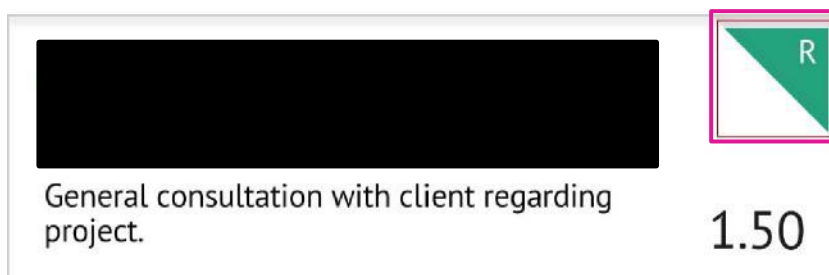
### Time Entries

- As you navigate through the days, the entries will display for the chosen day.
- You may tap on any of these time entries to edit or display the details.
- Time entries will sync with the entries on your Surface Book.
- Swipe left on any time entry for a shortcut menu which will allow you to submit or duplicate the time card.



## 2.3 Statuses

The colored triangles on the corner of the time entries shows the status of the entry.



The meanings of Status is as follows:

Letter	Status
<b>S (Orange)</b>	Saving
<b>D</b>	Draft
<b>S (Yellow)</b>	Submitting
<b>Pe</b>	Pending
<b>R</b>	Released
<b>Po</b>	Posted
<b>E</b>	Error

## 2.4 Timers View

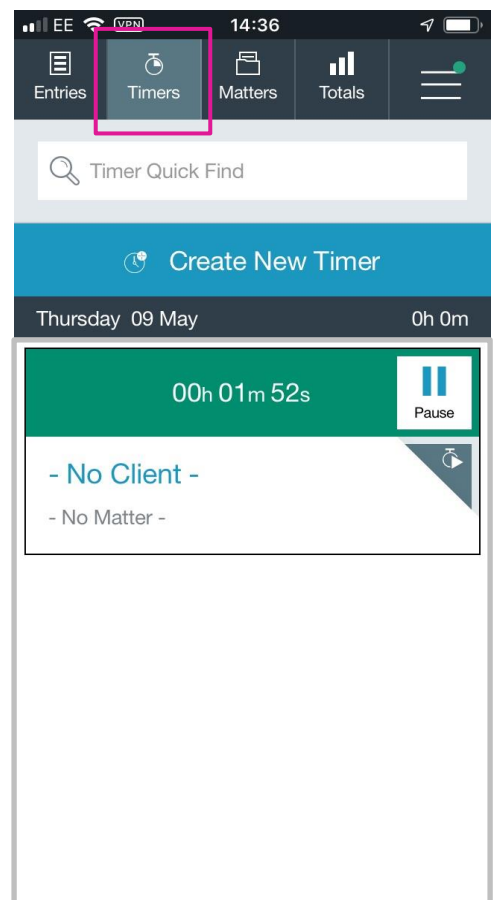
In this view you are able to create new timers. Timers will be stacked and you can scroll through them using the pause and resume buttons as needed.

Opening the timer will enable you to:

- Delete
- Duplicate
- Save
- Submit the recorded time

Details of the Client/Matter, Actions, Narrative and PreBill Comments may also be edited here.

Timers will keep running until they are manually stopped. Even if the app is closed.



## 2.5 Matters View

The Matters view has several important features:

- Search bar
- Recently Used Matters list

If you prefer to view and create your time entries by client and matter, then this view is the best view to use.

### Search Bar

- Begin typing the name or code of a client or matter to find the correct one. You can search for matters using text or numbers both before and after the stop.
- You may use temporary names.
- Tapping on a client/matter will open a list of entries for that client for the past 60 days. From here, you may create a time entry for that client/matter.

### Recently Used Matters

- Tap 'Sort' to sort the client/matter into recently used order and matters that you have recently accessed will appear in light blue and will automatically be populated in the list.
- Tapping on a client/matter will open a time card.
- The Sort feature will allow you to sort by:
  - Last Used
  - Matter Name
  - Matter Code
  - Client Name
  - Client Code



## 2.6 Totals View

The Totals view allows you to see a summary of time entries by the week.

- Use the arrows at the top to navigate between weeks.
- Tap a status to view all of the entries with that status.
- Tapping on a day within the graph will take you to the **Entries** view for that day.
- Tapping on any entries with errors will open up the time entry to be corrected.



### 3 TIME CARD

Whenever you see the **Create New Time Entry** button, you may add a new time entry by tapping on the button.

This will display the time card.

#### Creating a Time entry

The **Transaction Date** will default to the date that you had chosen from the **Entries** view or today from the **Matters** view. You may also tap on the field to change the value using a month calendar.

Tap the **Duration** field to add a duration. This will display a calculator for entering the time length. You can enter using decimals or minutes by toggling the **/:** button.

The **Client/Matter** will default if you choose to create a time entry from the **Matters** view. If you need to add or change the client/matter, tap the field and search for the correct client/matter.

The **Action** code determines what kind of work this time entry covers. You may clear it by using the X button or tap on the field to change it.

Any other required fields will be noted with a **red asterisk**.

Save, Submit and/or Release as desired.

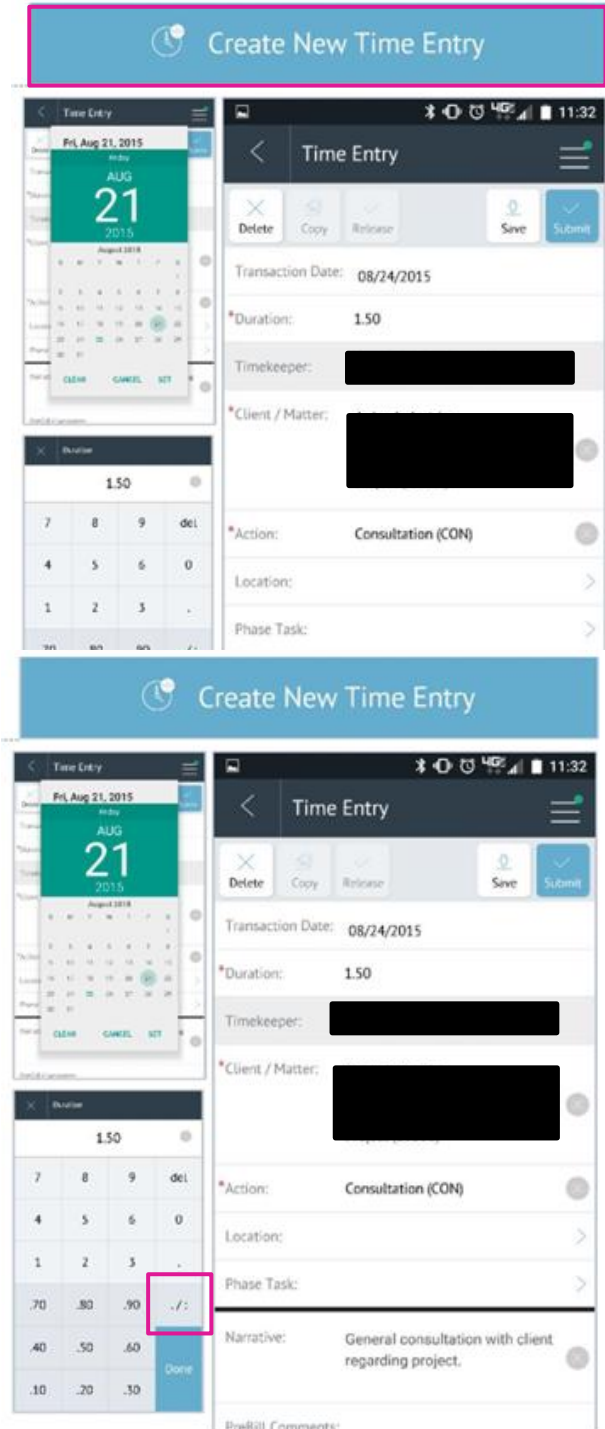
**Narrative** can be dictated using the microphone button on the iPhone keyboard.



**Expansion Codes** may be used by typing the equals sign (=) and then the code. Additionally, once you type the equal sign, a list will appear of available codes.



**Time and Units** may be changed by tapping this button on the screen





## Action Buttons

Within a time card, there are several action buttons.

- **Delete** – Will delete the time entry.
- **Copy** – Will copy the details of the time entry into a new time card.
- **Release** – Will release a pending time entry so that it can be posted. Please note you cannot post entries, you will need to wait for them to be released.
- **Save** – Saves the time entry to a draft status.
- **Submit** – Submits the entry to a pending status.

## 4 ADDITIONAL FEATURES

### Menu

Tapping on the **three lines** from the Navigation Bar will open a menu of different options.

### **Online/Offline**

Tap on this option to toggle between being online and offline.

### **Default View**

You may choose which view you see when you open On the Go Time.

### **Help**

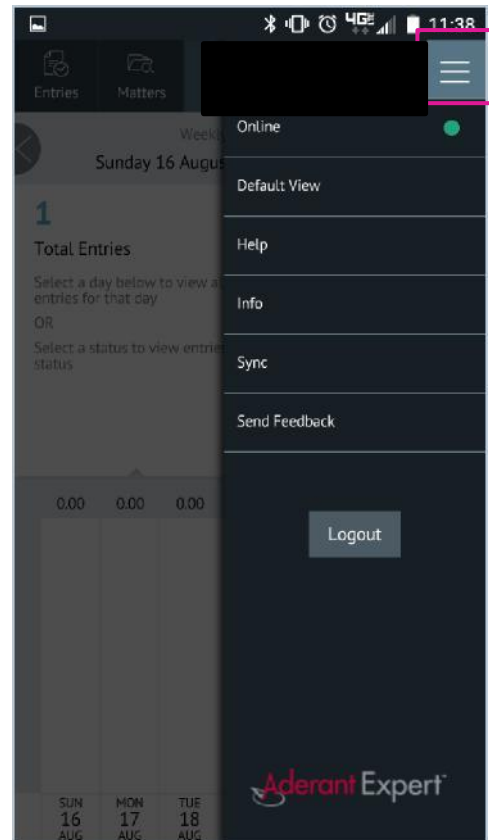
This will open a help screen with the basic information that you need to use On the Go Time and some helpful tricks.

### **Info**

This will open the version information for On the Go Time.

### **Sync**

This will allow you to sync changes from the main database to the On the Go instance. A warning message will appear to ensure you want this update. Tap OK to proceed.



## 5 HELP AND SUPPORT

For further help and support, please contact a member of the Learning Technology Team.

**Last Reviewed  
5 June 2019**