Deltek Vision 6.1 Mobile Timesheet and Expense Report for Hand-Held Devices Quick Reference Card

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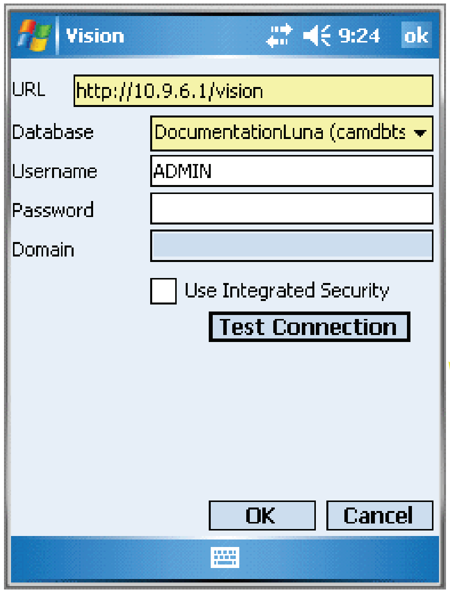
Checklist

1. Connect your hand-held device to the Vision database for the first time.
2. Synchronize to download data from the Vision database to your device.
3. Update timesheets and expense reports on your device when you are disconnected from the Vision database. See side 2 for details.
4. Synchronize to upload timesheet and expense report records from your device to the Vision database.



Connect to Vision for the First Time

Before you can enter timesheets and expense reports on your hand-held device, you must first connect to the Vision database and synchronize.

1. From the Vision main form on your hand-held device, tap the **Synchronize** icon. The first time you connect, your hand-held device displays the following message: "You need to set up your connection to Vision."
2. On the Synchronize form, tap **Menu » Setup Connection**.
3. On the Connection Setup form, enter the URL that links your device to Vision.
4. Select the Vision database. The **Database** drop-down list displays databases that are accessible via the selected URL.
5. Enter your Vision username. This is required unless you select the **Use Integrated Security** check box.
6. Enter your Vision password.
7. If you use Integrated Security, select the **Use Integrated Security** check box, and enter the domain server name.
8. Tap the **Test Connection** button to test your connection.
9. Tap **OK** to close the Connection Setup form and return to the Synchronize form.
10. On the Synchronize form, tap the **Synchronize** button to begin the synchronization.

Synchronize with Vision

To synchronize for the first time and at any time thereafter: From the Vision main form on your hand-held device, tap the **Synchronize** icon. On the Synchronize form, tap the **Synchronize** button to begin the synchronization.

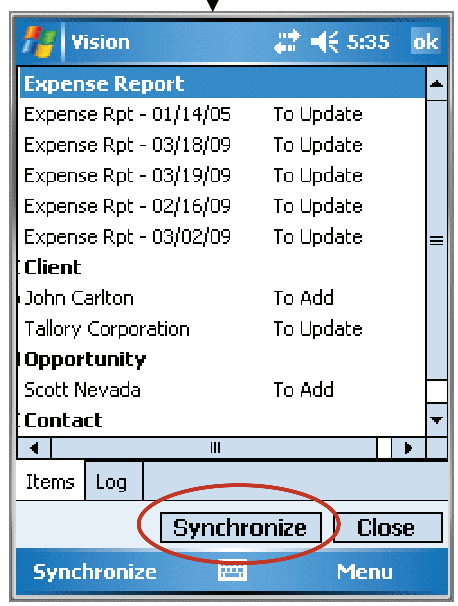
What happens when I synchronize?

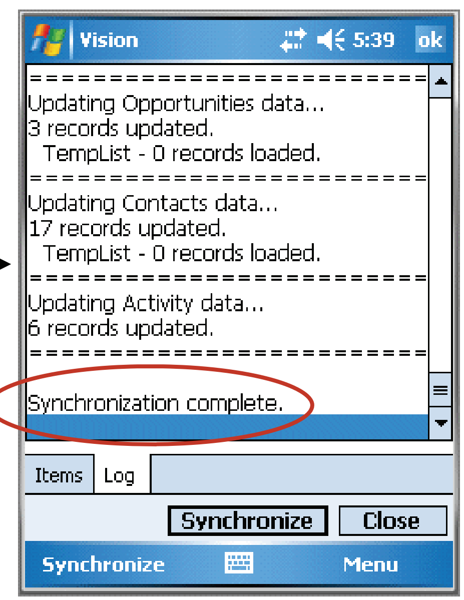
Synchronization is bi-directional. Information is both uploaded from the device to Vision and downloaded from Vision to the device. The synchronization process occurs in three phases:

Phase 1: All timesheets and expense reports that have changed since the last time you synchronized are uploaded to the Vision database and removed from the device. Timesheets and expense reports with or without the **Submit** check box selected are uploaded during synchronization. However, only those with the **Submit** check box selected are submitted in the Vision database.

Phase 2: All reference data is removed from the device and replaced with an up-to-date copy from the Vision database.

Phase 3: Any "In Progress" timesheets or expense reports are downloaded from Vision to the device (this may include items that were just uploaded to Vision during phase one). If your system requires an electronic signature, Vision prompts you to enter your password before any data is synchronized.





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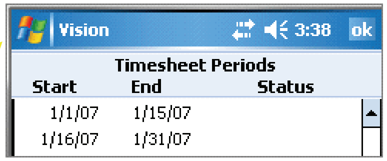
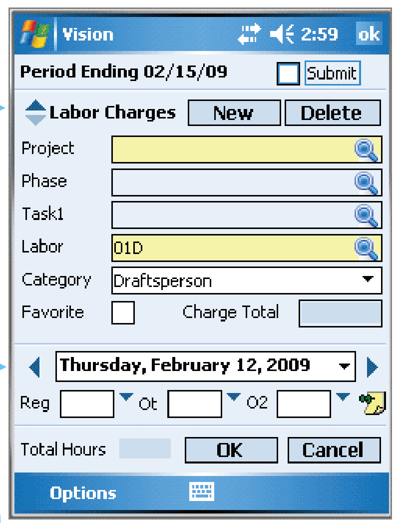
Open a Timesheet and Enter Data

1. From the Vision main form on your hand-held device, tap the **Timesheet** icon.
2. On the Select Period form, tap a timesheet period to open a timesheet. The Select Period form displays a list of all labor periods (timesheets) available to you and the status of each.
3. On the Timesheet form, tap **Options** to select the options to display on the timesheet form.
4. On the Timesheet form, tap one of the following:
   - **Labor Charges** navigation arrows to select an existing labor charge.
   - **New** to create a new labor charge.
   - **Delete** to remove a labor charge.
5. Enter the timesheet data and hours for each labor charge.
6. Tap the **Comments** icon to add any comments to the timesheet.
7. After you enter all hours for a timesheet and it is complete, tap the **Submit** check box. Submitted timesheets are ready to be approved (if your system administrator requires approval) or ready to be posted (if approval is not required).
8. Tap **OK** to save your timesheet.
9. Synchronize with Vision the next time you connect to the Vision database.

Use the arrows beside the date at the bottom of the Timesheet to scroll through and select the date for your timesheet entry. After you select a date, enter regular hours, overtime hours (if applicable), and any additional comments that apply to the selected labor charge. Tap the arrows to scroll to the next date for your timesheet entry, and enter the hours for that date. Repeat until all date and time information is entered.



A labor charge is a line item on a timesheet. For each line item, you enter hours worked for a project, phase, task, labor code, and labor category (if you use each of these). Tap the **Labor Charges** up and down navigation arrows to edit or view the labor charges that are currently entered for a timesheet. Labor charges that display include favorites (labor charges that you use regularly) and special categories set up by your system administrator, such as vacation or sick leave.

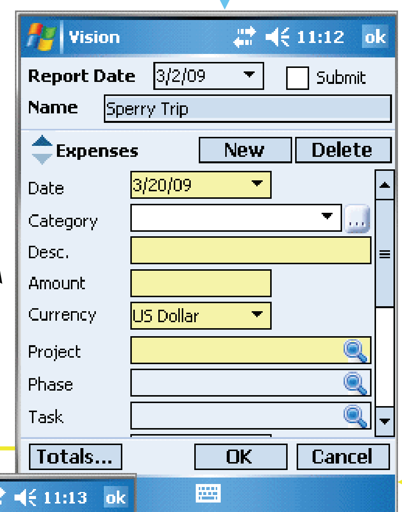


Tap the Find icon in a field to access a dialog box from which to select data for the field.

Tap the down-arrow beside a field to select from a list of items for the field. After you enter the respective timesheet or expense information, tap **OK** to save your entries.

Open an Expense Report and Enter Data

1. From the Vision main form on your hand-held device, tap the **Expense Report** icon.
2. On the Select Report form, tap an existing expense report from the list, or tap the **New** button to create a new expense report.
3. On the Expense Report form, tap one of the following:
   - **Expenses** navigation arrows to select an existing expense item.
   - **New** to create a new expense item.
   - **Delete** to remove the current expense item.
4. Enter expense report information.
5. View the totals.
6. After you enter all items for an expense report and it is complete, tap the **Submit** check box. Submitted expense reports are ready to be approved (if your system administrator requires approval) or ready to be posted (if approval is not required).
7. Tap **OK** to save the expense report.
8. Synchronize with Vision.



The **Totals...** button displays on the Expense Report form if your system is configured to display expense report totals. Tap the **Totals...** button to view the total monetary amount of all the expense items on the expense report, the amount advanced, the total due, and the total of any company paid items (if enabled in **Configuration » Time & Expense » Company Expense**).