Deltek

Deltek Ajera 10

Getting Started: Employees

June 12, 2024

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What you can do in your dashboards: Employees

Your dashboards are your central hub for information about timesheets and expense reports.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As an employee, your dashboards can be set up to help you:

- Quickly view timesheet and expense report information.
- Easily access your past timesheets and expense reports.
- Keep track of your hours such as regular pay, overtime, vacation and sick time, and other types of pays.
- View utilization to quickly know your percentage of time that is billable.

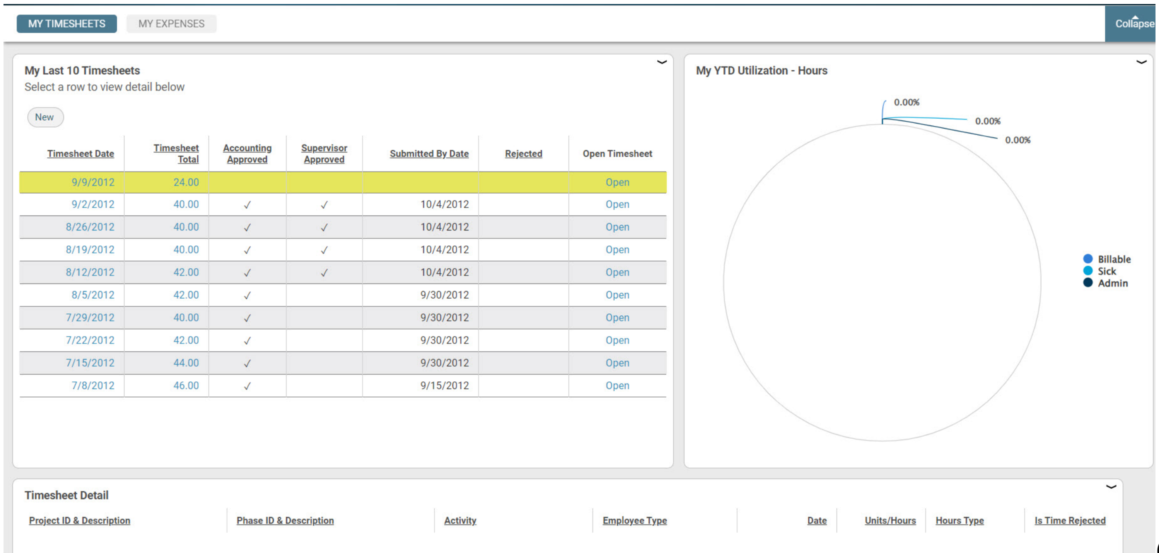
These are just a few examples of what your dashboards can provide.

How do they work?

The dashboards display the information that matters the most to you:

- *Home page:* View an aggregate of your key information. With one look, you're instantly up-to-date.
- <*Variable*> *pages:* Click a link in a widget to go to a <*variable*> page that displays information specific to what you selected, such as the Employee page.

This example illustrates how your dashboards may be set up:



Timesheet Date	Timesheet Total	Accounting Approved	Supervisor Approved	Submitted By Date	Rejected	Open Timesheet
9/9/2012	24.00					Open
9/2/2012	40.00	✓	✓	10/4/2012		Open
8/26/2012	40.00	✓	✓	10/4/2012		Open
8/19/2012	40.00	✓	✓	10/4/2012		Open
8/12/2012	42.00	✓	✓	10/4/2012		Open
8/5/2012	42.00	✓		9/30/2012		Open
7/29/2012	40.00	✓		9/30/2012		Open
7/22/2012	42.00	✓		9/30/2012		Open
7/15/2012	44.00	✓		9/30/2012		Open
7/8/2012	46.00	✓		9/15/2012		Open

(click to expand)

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What you can do in the menu: Employees

Typically, you can:

- Enter timesheets.
- Enter expense reports.
- View your schedule in Schedule Manager.

What reports and inquiries you might see

The Ajera Administrator, accounting manager, and principal typically have unlimited access to all reports, inquiries, and financial statements. You do not have access to any of the report, inquiries, and financial statements unless they grant you access.

Employees typically have no access to reports and inquiries.

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Lessons about the menu: Employees

Here's a quick look at the areas of the Ajera Online Help that pertain especially to your work in the menu as an employee.

E-learning lessons for employees

In Ajera, you'll find two different types of e-learning lessons depending on what you need:

Video lessons. See Ajera in action for those topics where you need to watch exactly what happens.

Quick lessons. See abbreviated instructions, as you follow along with numerous illustrations of the software.

Managing time and expense

Lesson	Video lesson or quick lesson	Duration
Entering expense reports		2:54
Updating tasks assigned to you		3:14

Industry webinars

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This link goes to the main Axium website.

Industry webinars

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Entering timesheets

About timesheets

The following is a typical sequence of events for processing time:

1. An employee enters time.
2. When finished entering all the time for a week, an employee submits the timesheet.
3. The supervisor, accounting manager, or project manager reviews the timesheet and does the following:
   - Approves the timesheet.
   - Rejects time on the timesheet, entering comments about the rejected time. The employee then corrects the rejected time and resubmits the timesheet.

   Depending on the options chosen when setting up company time and expense entry preferences, the supervisor/manager may have access to change an employee's timesheet.

Working with timesheets

The following events occur as you process time at your company:

When this occurs	This happens
Close or save a timesheet	Ajera saves the time you entered and updates the client invoice and project information with it.
Submit	An employee has finished entering time on a timesheet and is ready for the supervisor/manager to review it. Now, to make any changes to the timesheet, the employee must first unsubmit it.
Approve	A supervisor/manager approves the time that the employee entered. The timesheet appears as Approved in timesheet lists. The timesheet can no longer be changed unless it is unapproved first.
Reject specific hours	When approving a timesheet, the supervisor/manager can reject specific hours and optionally add any comments. If a timesheet has any rejected hours, the timesheet appears as Time Rejected in timesheet lists. The employee must correct the time and submit the timesheet again. The rejected hours appear in bold type on the timesheet for the employee to review or change them.
Reject	The supervisor/manager rejects the entire timesheet. The timesheet appears as Time Rejected in the timesheets list. The employee must correct and submit the timesheet again. Rejected time cannot be billed or paid.
Unsubmit	An employee decides a timesheet is not ready for approval after all. An employee can change a timesheet if it has not yet been approved. However, an employee cannot change any time on the timesheet that has already been billed or

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When this occurs	This happens
	paid.
Unapprove	A supervisor/manager decides that they do not want to approve the timesheet after all. However, any time that has already been billed or paid can no longer be changed.
Delete	You cannot delete a timesheet if it has been submitted or if it contains time that has been billed or paid.

Entering a timesheet

Learning Resource: Time Entry Functional Guide

Before you begin

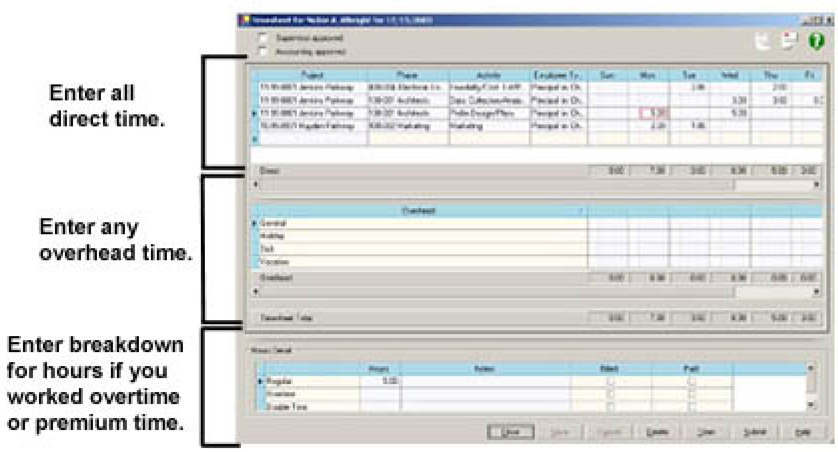
- Check the Don't Allow Entries Prior To Date on the > **Setup > Company > Preferences** > **General** tab. You cannot enter time before that date.

To enter a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. On the **My Timesheets** tab, click the **New** button.
3. For the timesheet ending date, either leave the date that appears or change it to reflect the date to which you want to enter time.

Note:	You can also enter your time by copying an existing timesheet.

4. Click **OK**. Your timesheet appears. It consists of three areas for entering your time.



5. Enter your time as follows:

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<table>
<tr><th>To enter</th><th>Do this</th></tr>
<tr><td>Direct or project time</td><td>
1. In the table at the top of the window, enter a project, phase, and then activity.
Multi-company only. If you enter time to a project that your company is not responsible for, Ajera creates intercompany entries. Be sure to reconcile your intercompany accounts regularly.
Note: For more information about the project, phase, or activity , click (Customize) after clicking .
2. Type the hours you worked on the project/phase/activity for each day of the week.
3. If notes are required on the timesheet, a Notes window appears when you leave a timesheet cell. If you do not enter notes in that window, Ajera clears the time you just entered.
4. Repeat these steps for each project/phase/activity you need to enter time for.
</td></tr>
<tr><td>Overhead or nonproject time</td><td>
1. In the table in the middle of the window, type the hours in the cell that correspond to the type of overhead and day of the week for the time you want to enter.
2. If notes are required on the timesheet, a Notes window appears when you leave a timesheet cell. If you do not enter notes in that window, Ajera clears the time you just entered.
</td></tr>
</table>

Note:	You can also enter hours using the timer. You can use the timer to track start/stop times, or you can use the timer without tracking start/stop times. When you click or tab to a cell, the Hours Detail table at the bottom of the window displays any detail for that cell.

6. If you worked overtime or other premium time:
   - In the table for direct time or overhead time, click the applicable cell.
   - In the Hours Detail table, type the overtime or premium time hours. The cell in the table for direct time or overhead time is outlined in red to show it is where you are currently entering time.
   - In the Hours Detail table, change the regular hours, if needed, so the total number of hours you worked for that project/phase/activity on that day is correct.
   - If notes are required on the timesheet, enter them into the Notes field in the Hours Detail table. If you leave the Notes field without entering notes, a window appears reminding you that notes are required.

   When you move out of a row in the Hours Detail table, the total number of hours appears in the cell in the table for direct time or overhead time. A plus sign (+) also appears to indicate that the cell total contains different types of hours in addition to regular time.
7. To attach a note for hours you worked:
   - In the table at the top or in the middle of the window, click the applicable cell.
   - In the Hours Detail table, enter notes in the applicable cell.

   A note symbol appears in the cell in the table at the top of the window to indicate that notes are attached.

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8. If you enter a row by mistake, do one of the following:
   - Click the row, click the **Delete** button, and click **Yes** to delete it.
   - Right-click the row, click **Delete Row**, and click **Yes** to delete it.
9. If you need to clear the contents of a timesheet cell, right-click the cell, click **Clear contents**, and click **Yes** to clear the contents of the cell.
10. Do one of the following:
    - If you are not ready to submit the timesheet, click **Close**. You can open it later. Ajera saves it under its week ending date.
    - If you are finished with the timesheet and want to send it for approval, click the **Submit** button. Once you submit a timesheet, you can no longer change it unless you unsubmit it. Click **Close**.

Submitting a timesheet

Submit a timesheet if you are finished entering the timesheet and want it approved. Once you submit a timesheet, you can no longer change it unless you unsubmit it.

If you are already viewing the timesheet, just click the **Submit** button.

To submit a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Timesheets** tab.
3. Submit the timesheet in one of the following ways:

To submit it	Do this
Without reviewing it first	Click the timesheet, and click the **Submit** button.
After reviewing it	1. Click the timesheet you want to submit, and click **Edit**. 2. Review the timesheet, and make changes if needed. 3. Click the **Submit** button.

Printing a timesheet

Print a timesheet if you need a report of the entered time.

To print a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. Click one of the following tabs:
   - **My Timesheets**, if you want to print your own timesheet.
   - **Timesheets by Employee**, if you have Administrator privileges and want to print someone else's timesheet.
3. Double-click the timesheet you want to print.
4. Click the **Print** button. A preview of the timesheet report appears.
5. Click in the report toolbar.

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Copying a timesheet

To copy a timesheet

1. From the ☰ > **Manage** menu, click **Time & Expense**.
2. On the **My Timesheets** tab, click the **New** button.
3. For the timesheet date, either leave the date that appears or change it to reflect the date you want to enter time for.
4. Select the **Copy timesheet from** check box, and click the date of the timesheet you want to copy.
5. Click **OK**. The timesheet appears.
6. Change the timesheet, as needed.
7. Do one of the following:
   - If you are not ready to submit the timesheet, click **Close**. You can open it later. Ajera saves it under its week ending date.
   - If you are finished with the timesheet and want to send it for approval, click the **Submit** button. Click **Close**.

Using the timer to track start/stop times

*This feature is only available from ☰ > **Manage** > **Time & Expense** and is not available for ☰ > **Manage** > **Timesheets**.*

Use the timer to automatically record hours when entering time.

The behavior of the timer depends on whether or not you are tracking work start and stop times.

This topic describes what happens if you **are** tracking start and stop times. In this case, you can record one interval of regular time and one interval of overtime per timesheet cell when entering time. If more than one overtime type is available, employees can record one interval per type.

If you are **not** tracking start and stop times, see Using the timer without tracking start/stop times.

Ajera Mobile Timesheets: You cannot track start and stop times with Ajera Mobile Timesheets on your mobile device.

To use the timer tracking

1. From ☰ > **Manage** menu, click **Time & Expense**, and do the following:
   - Open a new timesheet:
     i. On the **My Time** tab, click the **New** button.
     ii. For the timesheet ending date, either leave the date that appears or change it to reflect the date you want to enter time for.
     iii. Click **OK**.
   - Open an existing timesheet:
     i. On the **My Time** tab, click the date for the timesheet you want to open, and click **Edit** .
2. Click the cell where you want to add time.
3. Click the **Timer** button. The Timer appears displaying the current time, and it begins counting.

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> **Note:** The timer counts time based on the time increment that was selected on the Time & Expense Entry tab of the Company Preferences window. For example, if the time increment is set at Half Hour, the timer counts time in half-hour increments.
>
> You can also change the elapsed time by typing a new time or by clicking the plus or minus button to change the time by the time increment set in company preferences. However, if no time increment was selected in the Company Preferences window, the plus and minus buttons do not appear.

4. When you want to stop counting time, click the **Stop Timer** button. The time you worked appears in the cell.
5. If you are tracking work start and stop times, the timer automatically counts the second session as overtime.

   To count that second session as regular time, add another row to your timesheet and start the timer from that row.
6. If it happens that you did not work on the project during all the time you used the timer, you can do one of the following:
   - Change the hours in the Hours Detail table.
   - Change the start time or end time in the Hours Detail table.

> **Note:** Start and end times appear if the **Start/end time** check box is selected in (**Customize**) window of the timesheet.

Using the timer without tracking start/stop times

*This feature is only available from > **Manage** > **Time & Expense** and is not available for > **Manage** > **Timesheets**.*

Use the timer to automatically record hours when entering time.

The behavior of the timer depends on whether or not you are tracking work start and stop times.

This topic describes what happens if you are **not** tracking start/stop times. In this case, you can record multiple intervals of regular time and overtime per timesheet cell while entering time. Ajera adds each successive interval to the total regular time or overtime recorded for the cell, and displays no start and stop times in the Hours Detail table.

If you **are** tracking start/stop times, see Using the timer to track start/stop times.

Ajera Mobile Timesheets: You cannot track start and stop times with Ajera Mobile Timesheets on your mobile device.

Recording one time interval

1. From > **Manage** menu, click **Time & Expense**, and do the following:
   - Open a new timesheet:
     i. On the **My Time** tab, click the **New** button.
     ii. For the timesheet ending date, either leave the date that appears or change it to reflect the date you want to enter time for.
     iii. Click **OK**.
   - Open an existing timesheet:

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   i. On the **My Time** tab, click the date for the timesheet you want to open, and click **Edit** .

2. Click the cell where you want to add time.
3. Click the **Timer** button. The Timer appears displaying the current time, and it begins counting.

> **Note:** The timer counts time based on the time increment that was selected on the Time & Expense Entry tab of the Company Preferences window. For example, if the time increment is set at Half Hour, the timer counts time in half-hour increments.
>
> You can also change the elapsed time by clicking the plus or minus button to change the time by the time increment set in company preferences. However, if no time increment was selected in the Company Preferences window, the plus and minus buttons do not appear.

4. When you want to stop counting time, click the **Stop Timer** button. The time you worked appears in the cell.
5. If you restart the timer for the same cell on your timesheet, the timer automatically adds the second session to the regular time recorded for the cell. Each subsequent session is added to the regular-time total.

   To record overtime, click the Overtime row in the Hours Detail table before clicking the **Timer** button. You can add subsequent sessions to the overtime total, if needed.
6. If it happens that you did not work on the project during all the time you used the timer, you can change the hours in the Hours Detail table.

Tracking in/out times

You can record in and out times for events, such as lunch/breaks, in the timesheet.

Ajera Mobile Timesheets: You cannot track in and out times with Ajera Mobile Timesheets on your mobile device.

Before you begin

- On the > **Company** > **Preferences** > **Time & Expense Entry** tab, select the **Track Start & Stop Times** check box.
- Change the overhead groups for which you want to track in/out times:
  - Add a row for each in time and a row for each out time. Example:
    - Work Day In
    - Work Day Out
    - Lunch In
    - Lunch Out
  - In each of these rows, select an overhead project to track the overhead time, select a phase and activity, and leave the Pay field blank.

To track in/out times

1. From the > **Manage** menu, click **Time & Expense**.

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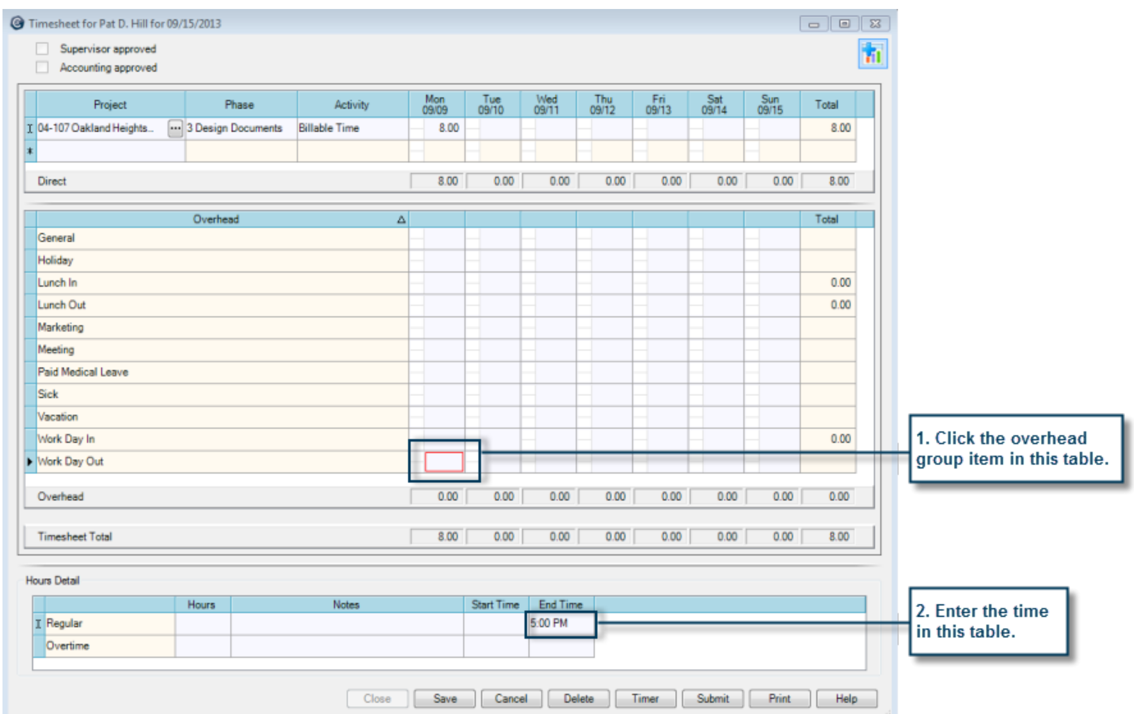
2. On the **My Time** tab, click the **New** button.
3. For the timesheet ending date, either leave the date that appears or change it to reflect the date you want to enter time for. Click **OK**.
4. Click (**Customize**) and select the **Start/Stop Time** check box. Click **OK**.
5. In the Overhead table, click the cell where you want to track the in time. A red border indicates that the cell is selected. Example:
   - In the Work Day In row, click the cell for Monday.
6. In the Hours Detail table, type the time in the Start Time cell and press the Tab key. In the Overhead table, **0** appears in the Total column. Example:
   - In the Regular row, type **8:00 AM** for the start time.

Note:	For each overhead group item, enter only a start time or only a stop time. If you enter both, Ajera automatically calculates the interval and enters the total time into the Overhead table.

7. In the Overhead table, click the cell where you want to track the out time. A red border indicates that the cell is selected. Example:
   - In the Work Day Out row, click the cell for Monday.
8. In the Hours Detail table, type the time in the End Time cell and press the Tab key. In the Overhead table, **0** appears in the Total column. Example:
   - In the Regular row, type **5:00 PM** for the end time.
9. Click **Save**.

   Example:



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Changing a timesheet

After you submit a timesheet, you can no longer change it unless you unsubmit it or your supervisor/accounting manager rejects any time on it.

After hours are paid or billed, you can add notes but you cannot change the hours.

To change a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Timesheets** tab. In the table, you can choose to:
   - View the sort order or appearance of columns differently.
   - Add optional columns to see additional information. Click (**Customize**), click the columns you want to add, and click **OK**.

Column	Description
Submitted	Indicates if the timesheet was submitted
Time rejected	Indicates if any time on the timesheet was rejected
Supervisor approved	Indicates if the supervisor approved the timesheet
Project manager approved	Indicates if the project manager approved the timesheet
Accounting approved	Indicates if the accounting manager approved the timesheet
Target billable %	Lists the targeted billable percent
Actual billable %	Lists the actual percent billable
Paid	Indicates if payroll has been processed for the employee
Regular	Indicates total regular hours on the timesheet
Overtime	Indicates total overtime hours for each overtime type set up in > **Setup** > **Company** > **Payroll** > **Pays**.

   - Change which timesheets appear in the table. Click (**Change View**), enter the following information, and click **OK**.

To view timesheets	Do this
For a certain period	In the Date Range field, click the date or time period you want to view timesheets for. To choose a range of dates, click **Select Dates** and then enter the beginning and ending dates in the fields that appear to the right.
Show only my employees	This option only appears if you are set up as an accounting manager, who by default sees all employees. Select the **Show only my employees** check box to see only your own direct reports instead of a list of all employees.

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To view timesheets	Do this
Show multilevel employees	This option only appears if you are set up as a supervisor, not as an accounting manager, and your company preferences are set up to allow multilevel timesheet approval (> Setup > Company > Preferences > Time & Expense Entry tab). Select the **Show multilevel employees** check box to see employees who report directly to you and those employees who report to supervisors who report to you.
If submitted	You can choose to see only timesheets that were submitted only by the employee, not submitted by the employee, or all timesheets. In the Employee field, make a selection.
If supervisor approved	You can choose to see only timesheets that were approved by the supervisor, not approved by the supervisor, or all timesheets. In the Supervisor field, make a selection.
If accounting approved	You can choose to see only timesheets that were approved by accounting, not approved by accounting, or all timesheets. In the Accounting field, make a selection.
If project manager approved	You can choose to see only timesheets that were approved by the project manager, not approved by the project manager, or all timesheets. In the Project Manager field, make a selection.

3. Click the date for the timesheet you want to change, and click **Edit**.
4. If needed, add optional columns to see additional information.

   Click the (**Customize**), click the columns you want to add, and click **OK**.

Column	Description
Direct time table at top of window:	
PM (Project manager approved)	Indicates if a project manager approved the time. The column is titled PM for Project Manager Approved.
Employee type	View the employee type.
Hours Detail table:	
Manager notes	View or change manager notes.
Rejected by	View who rejected the timesheet.
Rejected date/time	View the date and time the timesheet was rejected.
Project manager approved by	View the project manager who approved the timesheet.
Project manager approved date/time	View the date and time that the project manager approved the timesheet.
Start/stop time	View the starting and ending time for time counted with the timer.

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Column	Description
Billed	View if the time has been billed.
Paid	View if payroll has been processed for the employee.

5. Make changes as needed:

To change	Do this
The project, phase, or activity	Either begin to type it or click ⋯. Multi-company only. If you select a project that is not linked to your company, Ajera creates intercompany entries.
Hours for direct time	In the table at the top of the window, change the hours in the applicable cell.
Hours for overhead	In the table in the middle of the window, change the hours for the applicable cell.
Overtime or other premium time	1. In the table at the top or in the middle of the window, click the applicable cell. 2. In the Hours Detail table, change the overtime or premium time hours. 3. In the Hours Detail table, change the regular hours, if needed, so the total number of hours you worked for that project/phase/activity on that day is correct. A plus sign + appears in a cell to indicate that the cell total contains different types of hours in addition to regular time.
Notes	1. In the table at the top or in the middle of the window, click the applicable cell. 2. In the Hours Detail table, enter notes in the Notes column for the hours you want to annotate. A note symbol ≈ appears in the cell in table at the top of the window if notes are attached.

6. To delete a row in the table at the top or middle of the window, do one of the following:
   - Click the row, click **Delete**, and click **Yes** to delete it.
   - Right-click the row, click **Delete row**, and click **Yes** to delete it.
7. To clear the contents of a timesheet cell, right-click the cell, click **Clear contents**, and click **Yes** to clear the contents of the cell.
8. Do one of the following:
   - If you are not ready to submit the timesheet, click **Close**. You can open it later. Ajera saves it under its week ending date.
   - If you are finished with the timesheet and want to send it for approval, click **Submit**. Click **Close**.

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Unsubmitting a timesheet

If you unsubmit a timesheet, you can make changes to it if it has not yet been approved. However, you cannot change any time that has already been billed or paid.

To unsubmit a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Timesheets** tab.
3. To see if a timesheet has been submitted, click (**Customize**), select the **Submitted** check box, and click **OK**.
4. Click the timesheet you want to unsubmit.
5. Click the **Unsubmit** button.
6. Click **Close**.

Deleting a timesheet

You cannot delete a timesheet if any of the time on it has already been billed or paid.

To delete a timesheet

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Timesheets** tab.
3. Click the date for the timesheet you want to delete. The dates in the list are week ending dates.
4. Click the **Delete** button.
5. Click **Yes** to delete the timesheet.
6. Click **Close**.

Ajera Mobile Timsheets

What are Ajera Mobile Timesheets?

Ajera Mobile Timesheets combine the power of Ajera's timesheets with the mobility of your phone or tablet to record your time and submit accurate timesheets - anytime, anywhere.

All you need to use Ajera Mobile Timesheets is a supported mobile device and a web connection to access your Ajera server.

Setting up Ajera Mobile Timesheets

Contact your IT resources to set up and configure your network, firewall, and Internet technology.

Note:	Because of the variations in firewalls, servers, network access, and Internet providers, Deltek cannot provide guidance on how you should configure your office.

Refer to the *Ajera Installation Guide* and *Ajera Hardware/Software Requirements* sheet for specific information on setting up Ajera for external web access.

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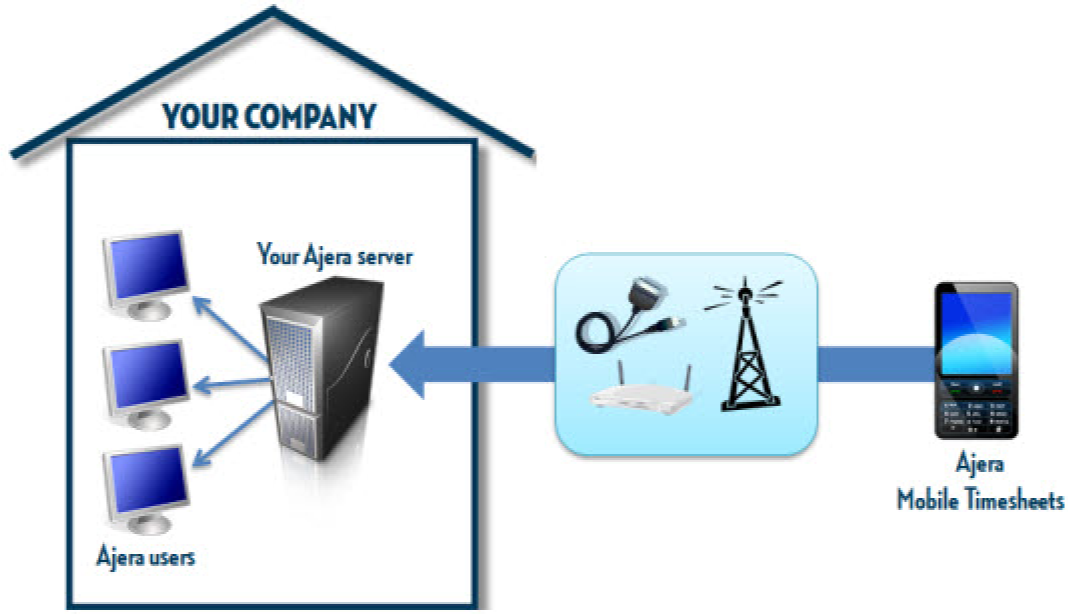

Learn how to:

- Enter project or overhead time
- Change time entries
- Delete time entries
- Correct rejected time
- Submit or unsubmit timesheets

Icons

moves backward to previous timesheets

moves forward to future timesheets

searches for projects by description, project ID, or client name

displays available hour types

indicates overtime on a time entry

indicates notes on a time entry

indicates rejected time

indicates a locked timesheet (submitted, approved, billed, or paid)

4.25 displays time entered; drop-down arrow displays on-screen keyboard

Entering time...

For a project

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1. Use (previous) and (next) at the top of the screen to navigate to the relevant timesheet. Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.
2. To switch to a specific day, tap on it and then tap **Add**.
3. Enter a project description, project ID, or client name and tap **Search**.

Note:	You can search on partial entries of project descriptions, IDs, or names. Searching requires an Internet connection.

4. Choose the project, phase, and activity that you worked on. Your setup determines what displays.
5. Choose the appropriate hour type. You can toggle between regular and overtime hours. If you have more than two hour types, a list appears.
6. Enter the time you worked on the project, phase, or activity, using the onscreen keypad or your device keyboard.
7. Enter notes. You can add notes to submitted, approved, or rejected timesheets.
8. Tap **OK** and then tap **Save** to save your entries. Your mobile device holds your updates even if you lose your Internet connection. When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.

For overhead entries

1. Use (previous) and (next) at the top of the screen to navigate to the relevant timesheet. Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.
2. To switch to a specific day, tap on it and then tap **Add**.
3. Choose one overhead entry. Only overhead groups set up for your organization appear on the list.
4. Choose the appropriate hour type. You can toggle between regular and overtime hours. If you have more than two hour types, a list appears.
5. Enter the time you worked on the project, phase, or activity, using the onscreen keypad or your device keyboard.
6. Enter notes. You can add notes to submitted, approved, or rejected timesheets.
7. Tap **OK** and then tap **Save** to save your entries. Your mobile device holds your updates even if you lose your Internet connection. When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.

Using a recent timesheet entry

1. Use (previous) and (next) at the top of the screen to navigate to the relevant timesheet. Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.
2. To switch to a specific day, tap on it and then tap **Recent** to see your projects from the last two weeks. You cannot use this option on approved timesheets.

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3. Tap to select one or more overhead and/or project items; appears next to your entries.
   To choose all project entries for a specific date, tap the date title bar.
4. Tap **Select Projects**.
5. If you chose more than one item, tap the one to which you want to add time.
6. Choose the appropriate hour type.
   You can toggle between regular and overtime hours. If you have more than two hour types, a list appears.
7. Enter the time you worked on the project, phase, or activity, using the onscreen keypad or your device keyboard.
8. Enter notes. You can add notes to submitted, approved, or rejected timesheets.
9. Tap **OK** and then tap **Save** to save your entries.
   Your mobile device holds your updates even if you lose your Internet connection.
   When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.

Submitting or unsubmitting timesheets

To submit or unsubmit a timesheet

1. Enter and save your time.
2. On the timesheet window, look for icons or statuses that might prohibit you from submitting your timesheet.
3. On the main screen, tap **Menu**.
   - Tap **Submit** to send your final timesheet to your supervisor for approval.

Note:	Timesheets are locked when they are submitted, approved, billed, or paid. If your supervisor or accounting manager has the appropriate preferences set, they can change your submitted timesheet. Contact your Ajera administrator for details.

   - Tap **Unsubmit** to return a submitted timesheet to a draft state. Make any changes and resubmit for approval.
4. Tap **Home** to return to the timesheet.

Correcting rejected time

Your supervisor can reject individual hours on a timesheet and add notes indicating why the time was rejected.

To correct rejected time

1. Use (previous) and (next) at the top of the screen to navigate to the relevant timesheet.
   Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.
2. Tap rejected dates highlighted in **red**.
3. To correct a rejected time entry, tap the entry.

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4. Review the **Rejection Notes** to determine what you should fix. If no notes exist, contact your supervisor for details.
5. Verify that you have chosen the correct project, phase, activity, and hour type.
6. Correct your time entry.

Note:	You may need to delete the time in the cell or delete the row then reenter the time on a new row for the submit button to become available.

7. Your mobile device holds your updates even if you lose your Internet connection.
When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.
8. Resubmit your timesheet.

Changing timesheets

- Entering time
- Deleting time entries
- Correcting rejected time
- Unsubmitting timesheets

Deleting time entries

To delete time entries

1. Use (previous) and (next) to navigate to the relevant timesheet.
Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.
2. Tap the time entry you wish to delete.
You cannot delete locked time entries (such as submitted, approved, billed, or paid).
3. Tap **Delete** at the bottom of the screen. That time entry disappears.
4. Your mobile device holds your updates even if you lose your Internet connection.
When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.

FAQs

What version of Ajera am I using?

Go to the Ajera Mobile Timesheets main menu, where you'll see the words *Ajera Mobile Timesheets*, followed by your current Ajera version.

Connectivity

Why can't I access my timesheet on my mobile device?

Turn off private browsing on your device when working on your timesheet.

What happens if I lose my Internet connection?

Your mobile device holds your updates even if you lose your Internet connection.
When your connection is restored, refresh your browser to sync your updates with your Ajera timesheet.

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How can I sync my mobile device with Ajera?

Refresh your browser to sync project updates, approvals, rejections, notes, or time entries.

Why are my timesheets slow to respond?

Ajera Mobile Timesheets is only as quick as the strength of your Internet signal. Connecting to a large Ajera database may also slow the responsiveness of your timesheets. Whenever possible, connect to the timesheets using a Wi-Fi signal.

How do Ajera Mobile Timesheets affect my data charges?

Because of the variations in Internet providers, Deltek cannot provide guidance on your specific data plans. Contact your device provider with your questions. Whenever possible, connect to your timesheets using a Wi-Fi signal.

Navigation

How do I move back and forth through my timesheet?

Use (previous) and (next) at the top of the screen to navigate to the relevant timesheet.
Do not use your device's back and forth buttons; they navigate only through web pages not through timesheets.

Projects

Why do I have to search for a project?

To minimize the impact to your data plan and performance, no project information is stored on the mobile device. You must connect to Ajera to find your project information.

You cannot search for projects if you lose your connection. Recent time entries do appear.

How far back can I see projects on the Recent list?

Recent entries include the last two full timesheet weeks plus the current week's entries.

Timesheets

How do I track start and stop times?

You must connect to Ajera to track start and stop times for periods like breaks, lunch time, or overtime. You cannot track start and stop times with ***Ajera Mobile Timesheets*** on your mobile device.

How can I access today's timesheet quickly?

Refresh your browser to go to today's time entries.

Why are some days shaded on the timesheet?

Your Ajera administrator can set which days are accessible on your timesheet. You cannot add time to a shaded day.

Why do some projects or phases require a timesheet note?

Ajera can be set up to require notes for all new projects. Contact your Ajera administrator for details.

Can I change a submitted, billed, or paid timesheet?

You can unsubmit (**Menu > Unsubmit**) to return a submitted timesheet to a draft state. You cannot unsubmit an approved, billed, or paid timesheet.

Can I add notes to submitted timesheets?

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To make any changes to a submitted timesheet, you must be set up with the appropriate preferences Contact your Ajera administrator for details.

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Entering expense reports

About expense reports

The following is a typical sequence of events for processing expenses:

1. An employee enters an expense report.
2. When finished entering all expenses, the employee submits the expense report.
3. If approvals are required (> Setup > Company > Preferences > Time & Expense Entry tab), the supervisor and/or accounting manager reviews the expense report and does one of the following:
   - Approves the expense report.
   - Rejects an item on the expense report, entering comments about the rejected item. The employee then corrects the rejected expense and resubmits the expense report.
4. After an expense report is approved (if approvals are required) or submitted (if no approvals are required), Ajera processes the expense report, which creates a vendor invoice for the non-credit card transactions and bank entries for the credit card transactions.

Depending on the options selected on the > Setup > Company > Preferences > Time & Expense Entry tab, the supervisor and accounting manager may have access to change an employee's expense report. After you pay the vendor invoice for the expense report, however, no changes can be made.

Learning Resources: Expense Entry Functional Guide

Working with expense reports

The following events occur when you process expenses at your company:

When this occurs	This happens
Save	Ajera saves the expense report that you entered.
Submit	The employee finished entering the expense report and is ready for the supervisor/accounting manager to review it. Now, to make any changes to the expense report, the employee must first unsubmit it. However, the supervisor or accounting manager can change a submitted expense report if their company preferences for time and expense entry are set up to permit it. Ajera processes the expense report unless company preferences for time and expense entry require supervisor or accounting approvals before processing.
Approve	The supervisor/accounting manager approves the expense report submitted by the employee. The expense report appears as Approved on the expense report list. Ajera processes the expense report after the supervisor, accounting manager, or both approve the expense report (depending on approval requirements set up in company preferences for time and expense entry).
Reject	The supervisor/accounting manager rejects an item in the expense report. The expense report appears as Expense Rejected on the expense report list. The employee must correct and submit the expense report again.

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When this occurs	This happens
Unsubmit	The employee decides the expense report is not ready for approval after all. An employee can change the expense report if it has not yet been approved or processed.
Unapprove	A supervisor/accounting manager decides not to approve the expense report after all. You can unapprove an expense report only if: • It was not yet approved by all the required approvers (as set up in > Setup > Company > Preferences > Time & Expense Entry tab). **Note:** If you required only Supervisor or Accounting approval, and the expense report is approved, you cannot unapprove it. • It has not yet been processed. About changing a processed expense report
Delete	You cannot delete an expense report after it is submitted.
Processing	Ajera creates a vendor invoice for the non-credit card entries, reflects the credit card entries on the bank register, and makes entries available in client invoices. It also reflects the changes on reports and financials. **Note:** Ajera bases the accounting date on the transaction date. When Ajera processes the expense report depends on how your approvals are set up in company preferences for time and expense entry: • If you do not require any approvals, Ajera processes the expense report when the employee submits it. • If you require only the supervisor or accounting to approve the expense report, Ajera processes it after that approval is made. • If you require both supervisor and accounting approvals, Ajera processes the expense report only after both the supervisor and accounting manager approve it. After Ajera processes the expense report, you cannot unapprove it. If you use multi-company, Ajera makes entries based on the employee's company, transaction type, and payment method. For more information, see About expense reports with multi-company. About changing a processed expense report

About expense reports with multi-company

About multi-company

To keep financial information separate, the setup of each employee, project, and bank account and credit card is linked to a company. When you enter an expense report, Ajera associates each transaction to its corresponding employee, project, or credit card.

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Ajera associates this transaction type	With the company linked to the
Project-related	Project
Nonproject-related and advances	Employee
Personal expenses	Credit card

As you enter expenses, Ajera creates intercompany entries when the companies involved are different.

Ajera creates intercompany entries for	When this happens
Credit card-related transactions	Credit card company and transaction company are different and the expense is not a personal expense.
Noncredit card-related transactions	Employee company and transaction company are different.

Credit cards assigned to employees belong to the same company associated with the employee. For expenses other than personal expenses, Ajera creates intercompany entries if the credit card company and the employee company are different. Be sure to reconcile your intercompany accounts regularly.

Example

An employee works for Company 1 and uses the company credit card to charge an expense to a project that belongs to Company 2. The employee makes another expense to the project, this time paying with cash.

In the expense report:

Ajera associates this	With this
Employee	Company 1
Credit card	Company 1
Project	Company 2
Credit card, project-related transaction	Company 2
Noncredit card, project-related transaction	Company 2

As a result:

Ajera creates these entries	For this
Employee Receivables/Accounts Payable and Due From	Company 1 (employee company)
Credit Card Payable and Expense and Due From	Company 1 (credit card company)
Work-in-progress, Expense, and Due To	Company 2 (project company)

Entering an expense report

Learning Resources: Expense Entry Functional Guide

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To enter an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. Click the **New** button.
4. In the beginning and ending date fields, enter the first and last date of expenses you are including on this report. Ajera uses the ending date as the date of the vendor invoice that it produces for this expense report.
5. Click **OK**.
6. Your name appears in the Employee field.
7. Type a short description of the expenses on this report. To enter a more lengthy description, enter your notes in the Notes field.
8. Review the report dates above the table to be sure they are correct, and change them as needed.
9. If you received an advance payment for the expenses you are reporting on this expense report, enter the amount in the Advance Amount field. Ajera uses the expense report ending date as the date of the advance transaction on the vendor invoice.

   Example: Your company issues you an employee advance of $500 for a weeklong conference. On your daily expense report, you enter the portion of the $500 advance spent that day.

10. If you enter an amount in the Total Amount field, as you enter expenses, Ajera displays the remaining amount. If you do not enter an amount, Ajera calculates it for you as you add expenses.
11. Complete one row of the table for each expense you want to enter:

For	Do this
Date	Enter the date of the expense.
Project	If the expense is associated with a project, enter that project. Do not enter a project if this is a personal expense.
Phase	If the expense is associated with a particular phase of a project, enter that phase. Do not enter a phase if this is a personal expense.
Expense Item	Select the type of the expense.
Payee	Type the name of the recipient for the payment you made.
Units	If you are entering a unit expense, type the number of units. For example, if you are entering an expense for gas mileage, you would enter the number of miles you drove.
Unit Rate	If you entered a unit, Ajera enters the unit rate and amount for you, based on the type of expense item you selected. You can change the rate, if needed. For example, if you are entering an expense for gas mileage, and your company reimburses you for 48.5 cents a mile, you would enter that amount here.

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For	Do this
	Note: If you change a unit rate, and then want to change it back to the rate Ajera calculated for you, click the cell, and then click the **Reset** button.
Amount	Enter the amount of the expense. If you entered units, Ajera calculates the amount for you, which you can change.
Reference	Use this field to group and summarize similar items on the credit card bank register. Enter any number on more than one expense item for those items to be grouped together. For example, on your credit card, you have separate charges for the hotel room and for parking at the hotel. On your expense report, you enter **H100** as a reference number for both the room charges expense item and the parking expense item. If the expense is to be reimbursed on a vendor invoice, this field is for reference only on the expense report.
Credit Card	If you charged the expense on a company credit card, select the credit card. **Note:** If you want an employee to view or edit this column, select the **Use expense reports** check box on the Setup > Employees > Time & Expense Entry tab and select at least one credit card in the credit card fields.
Personal Expense	Select this check box if this is a personal expense and you charged it on a company credit card. Ajera then enters the expense as a negative distribution on the vendor invoice for the expense report.
Notes	Enter any notes about the expense report.

12. Add these optional columns to the table, as needed:

Column	Description
Import	Click the ... to open a list of import items. You can only select one item to associate with an expense report row.
Attachments	Any attachments related to the item You can click the attachments icon in the table to add, change, or open attachments. The column displays if there are no attachments, and if there are attachments.
Notes	Any notes entered by the employee submitting the expense report.
Manager Notes	Any notes entered by the manager approving the expense report.
Reject by	The person who rejected the item.

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13. To import credit card items, click the **Import** button.
14. Select individual items or click **Select All** to add credit card items to the expense report.
15. If you need to delete an expense report item that you just added, click the row of the item, and click the **Delete** button.
16. Do one of the following:
    - If you are finished with the expense report and want it to be processed (or approved, if your company requires approvals), click the **Submit** button. Once you submit an expense report, you can no longer change it unless you unsubmit it.

      You can unsubmit an expense report only if your company requires approvals.
    - If you are not ready to submit the expense report, click **Save**. You can open it later.

Submitting an expense report

Submit an expense report if you are finished entering an expense report and want it to be processed (or approved, if you company requires approvals). Once you submit an expense report, you can no longer change it unless you unsubmit it.

If you are already viewing the expense report, just click the **Submit** button.

To submit an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. Submit the expense report in one of the following ways:

To submit it	Do this
Without reviewing it first	Click the expense report, and click the **Submit** button.
After reviewing it	1. Click the expense report you want to submit, and click **Edit** . 2. Review the report, and make changes if needed. 3. Click the **Submit** button.

Note: You can unsubmit an expense report only if your company requires approvals (> Setup > Company > Preferences > Time & Expense Entry tab).

Copying an expense report

You can create a new expense report by copying an existing report and modifying it.

To copy an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. Click the **New** button.

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4. In the beginning and ending date fields, enter the first and last date you are reporting expenses for.
5. Select the **Copy expense report from** check box.
6. In the table, click the expense report you want to copy.
7. Click **OK**.
8. Change information for the expense report, as needed.

Note:	• Ajera automatically enters the expense report ending date as the transaction date. You can change this date. • After you enter an amount, the Credit Card field becomes available for entry.

9. Click **Save**.

Changing an expense report

After you submit an expense report, you can no longer change it unless you unsubmit it or your supervisor/accounting manager rejects any expenses on it. You can unsubmit an expense report only if your company requires approvals (> Setup > Company > Preferences > Time & Expense Entry tab).

To change an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. To change the list of expense reports you are viewing on this tab, do the following, as needed:
   - Change which expense reports appear in the table. Click (**Change View**), enter the following information, and click **OK**.

To view expense reports	Do this
For a specific period	In the Date Range field, click the date or time period you want to view expense reports for. To choose a range of dates, click **Select Dates** and then enter the beginning and ending dates in the fields that appear to the right.
For a specific status	• Select **Employee** to list expense reports you submitted, expense reports you did not submit, or both. • Select **Supervisor** to list expense reports that your supervisor approved, expense reports not approved, or both. • Select **Accounting** to list expense reports that accounting approved, expense reports not approved, or both.

   - Add optional columns to see additional information about the expense reports. Click (**Customize**), click the columns you want to add, and click **OK**.

Column	Description
Submitted	If selected, it indicates the employee submitted the expense report.
Advance	The amount of any advance given to the employee as reported on the expense

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Column	Description
	report
Credit card amount	The amount of all items on the expense report charged on a company credit card
Personal expense	The amount of all items charged on a credit card that the employee reported as a personal expense
Reimbursement amount	The amount that the company will reimburse the employee. It is the amount of all expenses less advances and personal expenses.
Supervisor approved	If selected, it indicates that the employee's supervisor approved the expense report.
Accounting approved	If selected, it indicates that the accounting staff approved the expense report.
Expense rejected	If selected, it indicates that the expense report was rejected by the supervisor or accounting staff.
Processed	If selected, it indicates that the expense report created general ledger entries, a vendor invoice for non-credit card transactions, and bank entries for credit card transactions.

- View the sort order or appearance of columns differently.

4. Click the row of the expense report you want to change, and click **Edit**.
5. Change the general information about the expense report:

Field	Description
Description	A short description of the expense report
Notes	A more lengthy description of the expense report
Report dates:	
Begin date	The earliest date of expenses you include on this report
End date	The latest date of expenses you include on this report
Report amounts:	
Advance amount	The amount of any advance payment you received for the expense on this expense report
Total amount	The total amount of all expense listed on the expense report.

6. Add, delete, or change expense report items, as needed.

   Add an item:

   Begin entering information on the next available row.

   Delete an item:

   Click the row of the item, and click **Delete**.

   Change an item:

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Field	Description
Date	The date of the expense
Project	The project associated with the expense - Do not enter a project if this is a personal expense.
Phase	The phase associated with the expense - Do not enter a phase if this is a personal expense.
Expense Item	A description of the expense
Payee	The recipient of the payment you made for the expense
Units	If units are associated with the expense, the number of units For example, if you are entering an expense for gas mileage, you would enter the number of miles you drove.
Unit Rate	If units are associated with the expense, the amount your company will reimburse you for each unit If you change any of the unit rates, and then want to change all the unit rates back to the rate Ajera calculated for you, click **Reset**.
Amount	The amount of the expense
Reference	Number used to group and summarize similar items on the credit card bank register For example, on your credit card, you have separate charges for the hotel room and for parking at the hotel. On your expense report, you enter **H100** as a reference number for both the room charges expense item and the parking expense item. If the expense is to be reimbursed on a vendor invoice, this field is for reference only on the expense report.
Credit card	If you charged the expense on a company credit card, the credit card you used **Note:** After you enter an amount, the Credit Card field becomes available for entry.
Personal expense	Select this check box if this is a personal expense and you charged it on a company credit card. Ajera then enters the expense as a negative distribution on the vendor invoice for the expense report.
Optional columns:	
Attachments	Any attachments related to the item You can click the attachments icon in the table to add, change, or open attachments. The column displays if there are no attachments, and if there are attachments.

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Field	Description
Notes	Any notes entered by the employee submitting the expense report.
Manager notes	Any notes entered by the manager approving the expense report
Reject by	The person who rejected the item

7. Click **Save**.

Deleting an expense report

To delete an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. Click the row of the expense report you want to delete, and click the **Delete** button.
4. Click **Yes** to delete the expense report.
5. Click **Save**.

Printing an expense report

Print an expense report if you need a report of the entered expenses.

To print an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click one of the following tabs:
   - **My Expenses**, if you want to print your own expense report.
   - **Expenses by Employee**, if you have Administrator privileges and want to print someone else's expense report.
3. Double-click the expense report you want to print.
4. Click the **Print** button. A preview of the expense report appears.
5. If there are uploaded attachments on the expense report, confirm whether to include the attached images and PDFs when printing.
6. Click in the report toolbar.

Unsubmitting an expense report

You can only unsubmit an expense report if it has not yet been processed (or approved, if your company requires approvals).

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To unsubmit an expense report

1. From the > **Manage** menu, click **Time & Expense**.
2. Click the **My Expenses** tab.
3. To see if an expense report has been submitted, click (**Customize**), select the **Submitted** check box, and click **OK**.

   The Submitted column appears on the window. A check mark appears in that column for an expense report if it has been submitted.
4. Click the expense report you want to unsubmit.
5. Click the **Unsubmit** button.
6. Click **Close**.

Paying an expense report

About the invoice

When the expense report is submitted, and then approved if your company requires approvals, Ajera produces a vendor invoice for the employee's expense report.

The vendor invoice for the employee expense report lists:

- All items not paid with a company credit card.
- Advances and personal items charged to a company credit card. It lists these as distributions with negative dollar amounts, which reduces the total amount of the invoice. Ajera also creates entries in the credit card account (> Manage > Bank Register) for all credit card items, including items entered as Personal on the expense report.

Paying the invoice

To pay an expense report, pay the vendor invoice for it as you would for any other vendor invoice. On the Vendor Payments window, note that

- The employee's name is listed in the Vendor column.
- To see all invoices for an employee, click the to the left of the employee's name.

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Reviewing your schedule

unavailable in ajeraCore

You can keep up-to-date on your work schedule in Schedule Manager. Only time entered in past weeks or scheduled in current and future weeks appears.

Depending on your security settings, you may view your schedule, or view and change your schedule.

To review your schedule

1. From the > **Manage** menu, click **Schedule**.
2. Click the **Employees** tab, and scroll to the right to view your hours:

In Schedule Manager, this	Contains this
Shaded cells	Timesheet hours entered to the project in past weeks
Columns with **green** headings	Actual and scheduled hours for current week As actual hours are entered to the project, Ajera updates the scheduled hours in the column to the left.
Columns to the right of the columns with **green** headings	Scheduled hours for future weeks

3. If you have permission, change your current or future hours as needed. Otherwise, contact someone who has permission to edit your schedule.
4. Click **Close**.

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