Deltek Touch for Maconomy

Touch 2.0 User Guide

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Contents

Overview

The Deltek Touch for Maconomy application is the best way for on-the-go Deltek Maconomy users to not only submit and track time, expenses, and mileage, but also approve time, expenses, vendor invoices, purchase orders, and even draft client invoices. It gives you access to several dialog boxes related to Time Registration and Expenses (both Expense and Mileage) in Maconomy. Even when you are away from the office, immediate iPhone or iPad access means Deltek Touch keeps you informed and in control.

Not all functionality is available in all Maconomy versions and in MScript and REST Web services. For more information, see the *Deltek Touch for Maconomy Mscript and REST Web Services Comparison Guide*.

This document contains detailed information and instructions on how to use various features of the application.

The official name of the application is *Deltek Touch for Maconomy*. This document only uses it at first mention. The succeeding instances of the application name display *Deltek Touch*.

In addition, the application name on *Apple App Store* displays *Deltek Touch for Maconomy*.

Mobile Device Requirement

In this release, the Deltek Touch application only supports mobile devices that run on Apple iOS 9.0 and higher.

If You Need Assistance

If you need assistance installing, implementing, or using Touch Time, Deltek makes a wealth of information and expertise readily available to you.

Additional Documentation

The following table lists the additional Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
Deltek Touch for Maconomy Installation Guide	This document provides instructions for the installation and configuration of the application.
Deltek Touch for Maconomy Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Touch for Maconomy Layout Customization Guide	*This document is only intended for Technical Consultants.* It describes tasks necessary for the customization of layouts of the Deltek Touch for Maconomy application.
Deltek Touch for Maconomy Upgrade Guide	*This document is only intended for Technical Consultants.* It describes necessary steps to upgrade to the latest Touch system.
Deltek Touch for Maconomy MScript and REST Web Services Comparison Guide	This document describes the differences between MScript and Representational State Transfer (REST) Web services to help technical consultants prepare for implementing Deltek Touch for new users or migrate their current Touch installation to REST.
Deltek FPU Release Notes for Maconomy Touch	*These documents are only intended for Technical Consultants.* The document names vary depending on the supported Maconomy version. Each document contains a summary of the pre-installation information, enhancements, and API changes to Touch for each supported Maconomy version. It is part of the Deltek Touch for Maconomy 1.4 product information suite and should only distributed internally within the Maconomy organization and to partners.

Getting Started

Your Deltek Touch administrator sends you an email message containing a link that either directs you to the *Apple App Store* (if Deltek Touch is not yet installed) or populates the **Server URL** field with your company URL.

Install Deltek Touch

If Deltek Touch is not yet installed, clicking the link in the email takes you to the appropriate app store to download the application.

1. On the *Apple App Store*, search for the application (*Deltek Touch for Maconomy).*
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking.

Deltek Touch populates the **Server URL** field automatically with the corresponding URL of your company.

If you are using an unsupported version of Maconomy (compatibility mode), you may be able to use the device native browser to enter your organization's Deltek Touch URL. The default URL can be changed to something else by the administrator.

In case of incompatibility, two messages display. The first one is the incompatibility message. Clicking **OK** on the first message displays a debug message, which contains additional information about the environment and is meant only for troubleshooting.

If you are running the browser version of the application on Safari, make sure that the **Private Browsing** mode is disabled for all iOS devices. For more information, see Deltek Knowledge Base #74415.

Deltek Touch does not support Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.

Log On to Deltek Touch

1. Tap *Deltek Touch*.
2. On your first login, the application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

   Usage Statistics Tracking tracks the number of times you access the application and how often you use certain features. Touch does not track any personal or confidential data, such as user name, projects, and clients.

3. Deltek Touch populates the **Server URL** field automatically with the corresponding URL of your company.

- For IIS Web server, the default URL is usually **https://<server>/deltektouch/maconomy/time/**, where **<server>** refers to the host name of your Deltek Touch Server (usually your Maconomy server).
- For Apache Web server, the default URL is **https://<server>:<port>/deltektouch/maconomy/time/**, where **<port>** refers to the port number that the Maconomy server uses to listen for requests.

  You administrator can change the default URL to something else.

4. Tap **Connect**. If you are having any connection problem, tap **Cancel** to check and fix the link if necessary.
5. Tap the **Username** and **Password** fields to enter corresponding values.
6. Tap **Login**.
7. Enter a four-digit security PIN, and re-enter it to confirm.

Security PIN

For initial login, Deltek allows you to create a security PIN. Instead of entering your user name and password on your next login, you need to enter your PIN.

Entering your PIN incorrectly three times in a row resets it and requires you to enter login credentials.

Log Out of Deltek Touch

To log out of the application, take one of the following actions:

- Press the **Home** button of your device.
- Tap , then tap **Log Out**. If you choose to do this, Deltek Touch prompts you for your PIN or password on your next login regardless of the timeout period.
- Tap , then tap **Settings**. Tap **Log Out**.

If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**. The **Terms and Use of Service** and **Usage Statistics Tracking** screens display.

Favorites are saved combinations of project, task, and activity, which enable you to have easy access to them when doing time registration.

Change User

1. Tap **Log Out**.
2. On a PIN screen, tap **Change User**.
3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.
4. On **Log In**, enter another user ID and password.
5. Tap **Log In**.

Reset PIN

1. Tap **Log Out**.
2. On a PIN screen, tap **Reset PIN**.
3. Enter a new four-digit PIN, and re-enter it to confirm.

Relaunch Behavior

Using the packaged application from the App Store, the following scenarios occur:

- If you close Deltek Touch and open it again from the **Home** screen or task bar (press and hold the **Home** button and tap the open application from the task bar), it displays the last screen that you accessed. In this case, you do not need to enter your password or PIN.
- If your session has timed out, Deltek Touch prompts you to enter your password or PIN the next time a server call is made (meaning, the next time the application "talks" to Maconomy).

For the browser version, the following scenarios occur:

- If you close the browser and open it again, the page displays the last screen that you accessed.
- If you move to another Web site or close the browser page completely, and then enter the URL again, Deltek Touch prompts you to enter your login credentials.

Screen Display

The Deltek Touch user interface has five major screens, which you can navigate easily from the sliding menu, which you can access by tapping . Depending on your settings, it opens either on **Weeks/Calendar** or **Timesheet**.

Time

This menu allows you to access the **Timesheet** and **Summary** screens.

The displayed options on the sliding menu vary, depending on your Maconomy version. For Maconomy 2.1 and 2.2, the **Timesheet** and **Summary** options now display under **Time**. For Maconomy 2.0 and XI, **Timesheet** and **Summary** are on the same level as the other options.

Timesheet

This screen lists all timesheet lines for a given period. If you want to change the period, tap . Tapping the icon, however, displays either the **Weeks** or **Calendar** screen. *For Windows Phone, only the **Weeks** screen displays.*

Tapping a a

Weeks

*This screen becomes available when **Submit Mode** is set to **Weekly**.* This screen lists all timesheet periods and their corresponding status, which determines a processing option available to you.

Calendar

*This screen only becomes available when **Submit Mode** is set to **Daily***. It replaces the **Weeks** screen and displays a calendar instead of the week list.

Summary

This screen displays the summarized time registrations per day or project for a selected timesheet period.

Expense

This menu allows you to access all **Expense Registration** screens.

Expense Sheet

This screen displays the list of all expense sheets available for the logged in user. From this screen, you can access the **Expense Sheet** screen, which displays a specific expense sheet and its details.

Expense Sheet

This screen allows you to submit, reopen, duplicate, or delete the expense sheet, attach a receipt, or add a new expense sheet line by tapping . From this screen, you can access the **Expense Sheet Line** screen.

Expense Sheet Line

This screen displays a specific expense entry in the selected expense sheet. It allows you to view the details of the selected expense sheet line, add, duplicate or delete an expense sheet line, or attach a receipt by tapping .

Quick Capture

This screen allows you to either take a picture using your device's camera or select a picture from the archive or camera gallery.

Mileage

This screen allows you to report your mileage.

Mileage Sheets

This screen displays the list of mileage sheets belonging to you (as the logged in user). It allows you to view a mileage sheet by scrolling through the list and tapping the mileage sheet. From this screen, you can access the **Mileage Sheet** screen by tapping .

Mileage Sheet

This screen displays a specific mileage sheet and its details. It allows you to submit or duplicate the mileage sheet, or add a new mileage sheet line by tapping . From this screen, you can access the **Mileage Sheet Line** screen.

Mileage Sheet Line

This screen displays a specific mileage entry in the selected mileage sheet.It allows you to view the details of the selected mileage sheet line, add a mileage sheet line or attach a receipt by tapping . You can also select a currency by tapping the **Currency** field.

Approvals

The Approvals functionality only applies to MScript. This menu allows you to review and approve items for approval. It only displays when the **Show Approval** toggle switch is set to **ON** on **Settings**.

Options

This menu allows you to manage Deltek Touch settings and access the Help.

Settings

This screen helps you configure the Deltek Touch settings according to your preferences.

Help

Tapping Help displays the user guide for this application. You can also access **Help** from **Settings**.

Timesheet

To access various **Timesheet** screens, tap and then tap **Timesheet**.

View the Timesheet List

On **Weeks**, scroll through the list to view timesheet periods and their status. A check mark displays beside the selected period. You can tap a timesheet to enter your time on a project. Tapping the selected period displays the **Timesheet** screen.

When in the **Daily** mode, however, Deltek Touch displays the **Calendar** screen instead of the **Weeks** screen.

View a Timesheet

The header of the **Timesheet** screen displays the current status and total hours of a timesheet period.

1. Tap , then tap **Timesheet**. Take one of the following actions:
   - Tap to display **Weeks**, then tap a timesheet period.*This screen displays if **Submit Mode** is set to **Weekly***.
   - On **Calendar**, tap a date. *This screen displays if **Submit Mode** is set to **Daily**.*
   - Tap **Today** (on **Calendar** or **Timesheet**) to display the timesheet containing the current date. Today's date is highlighted.
2. On **Timesheet**, you can perform any of the following tasks:
   - Switch between different days of a timesheet period by swiping the date carousel or tapping a date to switch to that date (for example, if you are on Mon 1, tapping Thu 4 moves the calendar to Thu 4).
   - Tap or at either end of the date carousel to go back to the previous period or move to the next (for example, if you are on Mon 13 – Sun 19, tapping the next button moves the period to Mon 20 – Sun 26).

   The selected day is highlighted.

If you tap **Timesheet** and a timesheet has not yet been selected, the timesheet with today's date displays.

Check Timesheet Status

The status of a selected timesheet and time period displays on **Weeks** (below start and end dates), **Timesheet** (same line as the start and end dates), and **Calendar** (dates use a color coding scheme). It determines which processing options are available to you.

- **New** – Timesheets that have not yet been created.
- **In Progress** – Timesheets that are not due and have not yet been submitted.
- **Due** – Timesheets that are due but have not yet been submitted.

- **Submitted** – Timesheets that have been submitted but not yet approved.
- **Approved** – Timesheets that have been submitted and approved.
- **Transferred** – Timesheets that have not been approved, but have never the less been transferred.
- **Fully Approved –** *This status only applies to REST*. Timesheets that have been approved by all users who need to approve them.
- **Rejected –** Timesheets that have been submitted but rejected by an approver.

Searching for a Job

Deltek Touch allows you to search for a job by tapping the magnifier next to a search box. On the **Find Job** screen, one of the following scenarios happen:

- For MScript, Deltek Touch returns all jobs to which you have access, but it only displays 30 jobs at a time. To see the next 30 jobs, tap **More**.
- For REST, Deltek Touch displasy all jobs to which you have access. Scroll through the list until you find the one that you need.

Editing a Timesheet

Deltek Touch allows you to perform several tasks for your timesheet. You can enter timesheet data, add or delete a timesheet line, copy a timesheet list, delete a timesheet line, create or delete a favorite, select an activity or a task, and reopen a timesheet.

On **Timesheet**, you can go to the previous or next period by tapping the arrow buttons at either end of the date carousel. For example, if you are on Mon 13 – Sun 19, tapping the next arrow button moves the period to Mon 20 – Sun 26.

If a timesheet line is marked as **Absence Management**, it displays as read-only. You cannot delete or copy it.

The hour on lines marked as **Absence Management** may be editable in Deltek Touch based on the **Allow Editing of Absence Timesheet Line** setting in Maconomy core. You can only access the **Timesheet Line** or **Log Entry** screen when **Allow Editing of Absence Timesheet Line** is set to **ON**.

Enter Time on Timesheet (Quick Entry)

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap the hour field of a selected line.
4. Scroll through the time picker, then tap a value.
5. Tap **Done**.
6. To edit more details, tap the project name.

Enter Time on Timesheet Line (Detailed Entry)

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap anywhere in a timesheet line except the hour field. The **Timesheet Line** screen displays with details for this line.
4. Tap the field that you want to update, then enter or tap the appropriate values.
5. Tap **Done** to save the line.

Add a Timesheet Line

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap .
4. Filter projects by tapping **All** or **Favorites**, or by entering a name, number, or client in the search field. Deltek Touch first searches through your recently used projects. Only those projects to which you have been assigned on the Employee Control feature in Maconomy core are available.
   - If the project for which you are searching is in the list, tap it.
   - If the project is not in the list, tap **Continue Search on Server** to search all of Maconomy.
   - If this project has tasks, you need to select the task.
5. Depending on your configuration, most details of the line will be defaulted for you. Make any changes to this line as appropriate, including adding hours, then tap **Done** to save.

Copy a Timesheet Line

This task only applies to MScript.

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Scroll through the list, then take one of the following actions:
   - Touch and hold the line until **Copy Line** displays, then tap it.
   - Tap the timesheet line to display the **Timesheet Line** screen, then tap **Copy Timesheet Line**.

Delete a Timesheet Line

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Scroll through the list, then take one of the following actions:
   - Swipe across the selected line in either direction (left-to-right or right-to-left), then tap **Delete**.
   - Tap the line to display the **Timesheet Line** screen, then tap **Remove from Timesheet**.

If there is no time logged for this project on any other day in this timesheet, you can tap **Delete Entire Line** or **Delete Time on this Day Only**.

Select a Task for a Line

The **Task** field only displays when a project has a task list.

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap a project.
4. Tap the **Task** field.
5. Scroll through the list or enter a keyword in the search field.
6. Tap a task.

When displaying a timesheet line for a project, Deltek Touch checks if the project has been set up to use both task and activity, only use activities, or an activity is derived from the selected task (that is, if tasks are used and you select a task).

Select an Activity for a Line

Deltek Touch usually allows you to update the **Activity** field if it is enabled. The field only becomes read-only when you are creating a new timesheet line and a selected task derives an activity with the **Overwrite Activity** marked.

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap a project.
4. Tap the **Activity** field.

5. Scroll through the list or enter a keyword in the search field.
6. Tap an activity.

If the activity is visible and read-only, Deltek Touch displays the derived activity by default.

Favorites

Favorites are saved combinations of project, task, and activity, which enable you to have easy access to them when doing time registration. You can access your Maconomy Time Registration Favorites from Deltek Touch as well as create new favorites from within the application.

The **Remarks** field on the **Favorite** tab of the **Find Job** screen allowsyou to easily identify the timesheet line that you need.

Create a Favorite

When you create a favorite from a timesheet line, the application can also copy the remark from the timesheet line to the favorite, depending on the setting in the Deltek Touch setup file (**DeltekTouch.I**).

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap .
4. Verify that **Find Project** displays **All**.
5. Scroll through the list or enter a name, number, or client in the search field. If the project is not included in the list, tap **Continue Search on Server** to search all of Maconomy.
6. Tap a project. You can also select a task/activity combination, which Deltek Touch saves as part of **Favorites**.
7. In **Create Favorite**, toggle the switch to **ON**.
8. Tap **Done**.
9. On the **Create Favorite** popup window, you can accept or change the default favorite name.
10. Tap **OK**.

Delete a Favorite

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.

3. Tap .
4. Tap **Favorites**.
5. Scroll through the list or enter name, number, or client in the search field.
6. Tap a project.
7. Tap **Delete Favorite**, then tap **Yes** to confirm.

Add a Daily Description

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Scroll through the list, then tap a timesheet line.
4. Tap the **Daily Description** field.
5. Enter your comments, then tap **Done** to save.

Delete a Daily Description

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Scroll through the list, then tap a timesheet line.
4. Tap the **Daily Description** field.
5. In the **Comments** field, tap .
6. Tap **Done**.

Reopen a Timesheet

You can only reopen a timesheet if you have rights to do so.

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap **Reopen**, then tap **Reopen** to confirm. The **Submitted** status returns to its previous status before you submitted it (for example, **In Progress**).
4. Update the timesheet, then tap **Submit**.

If you are in the **Weekly** submit mode, you can also reopen the timesheet on the **Summary** screen.

Submit a Timesheet

Before you submit a timesheet, make sure that each timesheet line has a project number, task, activity, daily description, and minimum required hours.

Deltek Touch supports two types of timesheet submissions, **Daily** and **Weekly**. The submit setting is defined in the DeltekTouch.I file and only displays (read-only) in the **Submit Mode** field on the **Settings** screen. The behavior of the **Submit** button depends on the set mode.

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel, or tapping .
3. Verify that you have entered all of your time for this period either on **Timesheet** or **Summary** screen. For **Daily** submit mode, you can only submit single days at a time from the **Timesheet** screen.
4. Tap **Submit**, then tap **Submit** to confirm.

- If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet and then correct it before submitting.
- If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

Review a Rejected Timesheet or Timesheet Line

You can only view rejected timesheets when the submit mode is set to **Weekly**.

1. Tap and then tap **Rejected**.
2. On **Rejected Timesheets**, scroll through the list and tap the timesheet or timesheet line that you need to review.
3. Update the timesheet or timesheet line, then tap **Done**.
4. When ask to continue, tap **Yes**.

Summary

To access various **Summary** screens, tap and then tap **Summary**.

View Period Summary

1. Go to the timesheet period that you want to view by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel.
3. Tap and then tap **Summary**.
4. Tap **Day** or **Job** to view the summarized information by day or job. Tapping a day in **Day** view opens the corresponding day for the current timesheet period on **Timeseet**.

Submit a Timesheet

1. Go to the timesheet period that you want to update by tapping a period on **Weeks** or a date on **Calendar**, depending on the **Submit Mode** setting.
2. On **Timesheet**, swipe the date carousel to select a date, or tap the date. You can also select a date from another period by tapping the previous or next button at either end of the date carousel, or tapping .
3. Tap and then tap **Summary**.
4. Verify that you have entered all of your time for this period. For **Daily** submit mode, you can only submit single days at a time from the **Timesheet** screen.
5. Tap **Submit**, then tap **Submit** to confirm.

- If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet and then correct it before submitting.
- If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

Expense

View the Expense Sheet List

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, tap either **Open** or **All**, and scroll through the list to view expense sheets, which are sorted descending with most recent at the top. The number of reports displayed depends on your settings. You can scroll down to get view next page. Tap an expense sheet to view details.
   - The **Open** expense sheets have the **In Progress** status and are open for editing.
   - The **All** expense sheets belong to you and allow you to edit or reopen submitted expense sheets, or reopen rejected expense sheets.

View Expense Sheet Details

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, tap **Open** or **All**, and scroll through the list to view expense sheets.
3. Tap the expense sheet that you want to view.

Add an Expense Sheet

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, tap .
3. On **Expense Sheet**,enter or select necessary details, then tap .

You can add a project to the **Expense Sheet** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter jobs by entering a job name, job number, or customer in the search field. You can also select one of the recently used jobs or a job from all jobs to which you have access based on the Employee Control feature in Maconomy core.

Copy an Expense Sheet

1. Tap , then tap **Expense Sheet**
2. On **Expense Sheets**, take one of the following actions:
   - Tap and hold an expense sheet, then tap **Duplicate**.
   - Tap an expense sheet and on **Expense Sheet**, tap , then tap **Duplicate**.

Add an Expense Sheet Line

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.

3. On **Expense Sheet**, tap , then tap **New Line**.
4. On **Expense Sheet Line**, enter or select necessary details, then tap .

You can also add an expense sheet line on the **Expense Sheet Line** screen by tapping , then tap **New Line**.

You need to add a project to the **Expense Sheet Line** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter projects by tapping **All** or **Favorites**. You can also select one of the recently used jobs or a job from all jobs to which you have access based on the Employee Control feature in Maconomy core.

If the selected project has a task or an activity, you must also select the task or activity by tapping the corresponding field.

Copy an Expense Sheet Line

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.
3. On **Expense Sheet**, tap the expense sheet line that you want to copy.
4. On **Expense Sheet Line**, tap , then tap **New Line**
5. Tap .

Delete an Expense Sheet

1. Tap , then tap **Expense Sheet**.
2. Scroll through the list to find the expense sheet that you want to delete and take one of the following actions:
   - *This only applies to MScript.* Swipe across the expense sheet in either direction (left-to-right or right-to-left), then tap **Delete**.
   - Tap the expense sheet, then tap **Delete** on **Expense Sheet**.

Delete an Expense Sheet Line

3. Tap , then tap **Expense Sheet**.
4. On **Expense Sheets**, scroll through the list to select an expense sheet.
5. Tap the expense sheet line that you want to delete.
6. On **Expense Sheet Line**, tap **Delete**.

Submit an Expense Sheet

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.

3. Tap the expense sheet that you want to submit.
4. On **Expense Sheet**, tap , then tap **Submit**.

- If there is any error, a notification screen displays. You need to tap the back button to return to the expense sheet and then correct it before submission.
- If you have rights to reopen the expense sheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted submitted sheets are read-only.

Reopen an Expense Sheet

You can only reopen an expense sheet if you have rights to do so.

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.
3. Tap the expense sheet that you want to submit.
4. On **Expense Sheet**, tap , then tap **Reopen**. The **Submitted** status becomes **In Progress**.

Attach a Receipt

Touch allows you to either take a picture using your device's camera or select a picture from the archive or camera gallery.

Receipts can either be attached to the Expense Sheet header or the Expense Sheet line (or both) depending on the setup. The said setting is controlled in the configuration file.

Using Quick Capture

This feature only applies to Maconomy 2.0 SP 5 (or higher), 2.1, and 2.2.

1. Tap , then tap **Quick Capture**.
2. Tap your device's default camera button, then tap **OK**. Tap **Retry** if you want to discard the previous photo and capture a new one.
3. On **Attach Receipt**, enter a receipt name, then tap the expense sheet to which you want it to attach. You can also create a new expense sheet by tapping **Create New**. The newly created expense sheet name displays and is automatically selected in the list.
4. Tap **Done**.
5. On **Expense Sheet**, enter or tap necessary details, then tap tap .

Using Attach Receipt

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.
3. Tap the expense sheet that you want to update.

4. On **Expense Sheet**, take one of the following actions:
   - On the header, tap , then tap **Attach Receipt**. If you take this step, skip step 5.
   - Under **Expense Sheet Lines**, tap the expense sheet line to which you want to attach a receipt. If there is no expense sheet line, tap then tap **New Line**.
5. On **Expense Sheet Line**, tap then tap **Attach Receipt**.
6. On **Attach Receipt**, tap **Take Picture**, **Pick from Gallery**, or **Pick from Archive**.
7. If you tap **Take Picture**, tap your device's default camera button, then tap **OK.** If you tap **Pick from Gallery**, tap the photo that you need, then tap **Use Photo**. If you tap **Pick from Archive**, tap the photo that you need.
8. On **Receipt**, enter a receipt name then tap **Done**. If you tapped **Pick from Archive**, you cannot edit the existing receipt name.
9. On **Expense Sheet Line**, enter or tap necessary details then tap .

Delete a Receipt

1. Tap , then tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to select an expense sheet.
3. Tap the expense sheet that you want to update.
4. On **Expense Sheet**, tap the expense sheet line with the attached receipt you want to delete.
5. On **Expense Sheet Line**, tap **Receipt**.
10. Tap **Delete**.

Mileage

View the Mileage Sheet List

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, tap either **Open** or **All** and scroll through the corresponding list of mileage sheets, which are sorted descending with most recent at the top.
   - The **Open** mileage sheets have the **In Progress** status and are open for editing.
   - The **All** mileage sheets belong to you and allow you to edit or reopen submitted mileage sheets, or reopen rejected mileage sheets.

View Mileage Sheet Details

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, tap **Open** or **All**, and scroll through the list to view expense sheets.
3. Tap the expense sheet that you want to view.

Add a Mileage Sheet

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, tap .
3. On **Mileage Sheet**,enter or select necessary details, then tap .

You can add a project to the **Mileage Sheet** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter jobs by entering a job name, job number, or customer in the search field. You can also select one of the recently used jobs or a job from all jobs to which you have access based on the Employee Control feature in Maconomy core

Copy a Mileage Sheet

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, take one of the following actions:
   - Tap and hold a mileage sheet, then tap **Duplicate**.
   - Tap a mileage sheet and on **Mileage Sheet**, tap , then tap **Duplicate**.

Add a Mileage Sheet Line

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, scroll through the list to select a mileage sheet.
3. On **Mileage Sheet**, tap , then tap **New Line**.

4. On **Mileage Sheet Line**, enter or select necessary details, then tap .

You can also add a mileage sheet line on the **Mileage Sheet Line** screen by tapping , then tap **New Line**.

You need to add a project to the **Mileage Sheet Line** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter projects by tapping **All** or **Favorites**. You can also select one of the recently used jobs or a job from all jobs to which you have access based on the Employee Control feature in Maconomy core.

If the selected project has a task or an activity, you must also select the task or activity by tapping the corresponding field.

Delete a Mileage Sheet

1. Tap , then tap **Mileage Sheet**.
2. Scroll through the list to find the expense sheet that you want to delete and take one of the following actions:
   - *This only applies to MScript.* Swipe across the mileage sheet in either direction (left-to-right or right-to-left), then tap **Delete**.
   - Tap the mileage sheet, then tap **Delete** on **Mileage Sheet**.

Delete a Mileage Sheet Line

3. Tap , then tap **Mileage Sheet**.
4. On **Mileage Sheets**, scroll through the list to select a mileage sheet.
5. Take one of the following actions:
   - *This only applies to MScript and only if the mileage sheet is not approved or not transferred.* Swipe across the mileage sheet in either direction (left-to-right or right-to-left), then tap **Delete**.
   - Tap the mileage sheet line that you want to delete. On **Mileage Sheet Line**, tap **Delete**.

Submit a Mileage Sheet

1. Tap , then tap **Mileage Sheet**.
2. On **Mileage Sheets**, scroll through the list to select a mileage sheet.
3. Tap the mileage sheet that you want to submit.
4. On **Mileage Sheet**, tap , then tap **Submit**.

- If there is any error, a notification screen displays. You need to tap the back button to return to the mileage sheet and then correct it before submission.
- If you have rights to reopen the mileage sheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted mileage sheets are read-only.

Reopen a Mileage Sheet

You can only reopen a mileage sheet if you have rights to do so.

1. Tap ☰, then tap **Mileage Sheet**.
2. On **Mileage Sheets**, scroll through the list to select a mileage sheet.
3. Tap the mileage sheet that you want to submit.
4. On **Mileage Sheet**, tap ⌄, then tap **Reopen**. The **Submitted** status becomes **In Progress**.

Display a Map

You can only use the Map feature if you enter or select addresses in **From** and **To** on **Mileage Sheet Line**. Enter or select an address from the Customer Address, My Addresses, or Recenty Used list.

1. Tap ☰, then tap **Mileage Sheet**.
2. On **Mileage Sheets**, scroll through the list to select a mileage sheet.
3. On **Mileage Sheet**, tap a mileage sheet line.
4. On **Mileage Sheet Line**, verify that **From** and **To** have values.
5. Tap ⌄, then tap **Map**. The corresponding Google map displays on a browser.

Approvals

The Approvals functionality only applies to MScript. This section describes tasks that are only applicable to Project Managers and Supervisors.

Only users who are included in the relevant Maconomy Approval hierarchies can view any content on these screens.

As the project manager or supervisor, you can display or hide the following **Approval** screens by tapping **Show Approval** on **Settings**, and turning on or off the corresponding toggle switches:

- **Timesheets**
- **Timesheet Lines**
- **Expense Sheet Lines**
- **Expense Sheets**
- **Purchase Order Lines**
- **Purchase Order**
- **Invoice Allocation Lines**
- **Vendor Invoices**
- **Draft Invoices**

- The available screens, however, depend on the available items to approve. If there are pending approvals, a corresponding badge displays on and on the same line as the **Items for Approval** item.

For more details about the various Approval screens, see the *Appendix: Approval Sreen Details* section of this document.

Tasks for Project Manager

Approve or Reject a Timesheet Line

The **Timesheet Line Approval** screen displays projects that contain timesheet lines for approval. The number at the end of the description shows how many lines are ready for approval for each project.

1. On **Timesheet Line Approval**, tap the project that contains timesheet lines you want to review.
2. Take any of the following actions:
   - Tap the check mark beside the timesheet line or tap **Select All**, and tap to select **Approve**, **Undo Approve/Reject**, or **Reject**. *Skip the third step.*
   - If you still want to review each timesheet line in detail, tap a timesheet entry. *Proceed to the third step.*
3. On **Timesheet Line**, tap , and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

- Tap or on the header to browse between timesheet lines.
- Tap each timesheet entry to view the **Log Entry** screen.

The following actions apply to all screens with the **Message to Employee** and **Reject** buttons.

- Tapping **Message to Employee** opens the default email service of your device prefilled with the email address of the employees and corresponding subject.
- Tapping **Reject** requires you to state a reason for the rejection.

Approve or Reject an Expense Sheet Line

An expense sheet can be either a normal expense or a mileage expense. The **Expense Sheet Line** and **Mileage Sheet Line** views are exactly the same, except for the layout and certain fields. If it is a mileage expense, the MILEAGE label as well as a quantity followed by "km."

1. On **Expense Line Approval**, tap the project that contains expense sheet lines that you need to approve.
2. On **Expense Sheet Lines**, take any of the following actions:
   - Tap the check mark beside the expense sheet line or tap **Select All**, and tap to select **Approve**, **Undo Approve/Reject**, or **Reject**. *Skip the last step.*
   - If you still want to review each expense sheet line in detail, tap an expense sheet line. *Proceed to the last step.*
3. On **Expense Sheet Line** (or **Mileage Sheet Line**), take any of the following actions:
   - Tap , and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.
   - Tap **Receipt** to view any available attachment.

On **Expense Sheet Lines** or **Expense Sheet Line**, tap or on the header to browse between corresponding entries.

Approve or Reject a Purchase Order Line

1. On **PO Line Approval**, tap the project that contains purchase orders that you need to approve.
2. Tap the purchase order.
3. On **Purchase Order**, take any of the following actions:
   - Tap the check mark beside the purchase order line or tap **Select All**, and tap to select **Approve**, **Undo Approve/Reject**, or **Reject**..
   - If you still want to review each line in detail, tap a purchase order line. Tap **Back** after your review.

On **Purchase Order**, tap or on the header to browse between purchase order lines.

Approve or Reject an Invoice Allocation Line

1. On **Invoice Allocation Approval**, tap the project that contains vendor invoices that you need to approve.
2. On **Vendor Invoices**, tap the vendor invoice.
3. On **Vendor Invoice**, take any of the following actions:
   - Tap the check mark beside the vendor invoice line or tap **Select All**, and tap to select **Approve**, **Undo Approve/Reject**, or **Reject**. *Skip the last step.*
   - Tap **Vendor Invoice** to view any available attachment.
   - If you still want to review each line in detail, tap a vendor invoice line. *Proceed to the last step.*
4. On **Invoice Allocation Line**, tap , and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

On **Vendor Invoice**, tap or on the header to browse between vendor invoice lines.

Approve or Reject a Draft Invoice

1. On **Draft Invoice Approval**, tap the invoice that you need to approve.
2. On **Draft Invoice**, take any of the following actions:
   - Tap to select **Approve**, **Undo Approve/Reject**, or **Reject**. *Skip the third step.*
   - Tap **Description** to display **Draft Invoice Lines**, which contains the lines of a draft invoice. Tapping a line displays **Draft Invoice Line**, which contains the details of a selected invoice line.
   - Tap **Draft Invoice Print** field to view the invoice draft in PDF format.

On **Draft Invoice**, tap or on the header to browse between invoice draft lines.

Tasks for Supervisors

Approve or Reject a Timesheet

The **Timesheet Approval** screen contains timesheets submitted by employees for whom you are the approver.

1. On **Timesheet Approval**, tap the timesheets you want to review.
2. On **Timesheet**, view the summary for each timesheet by **Job** or **Day**. Tapping an entry on the **Job** summary displays the **Entries by Job** screen. Tapping an entry on the **Day** summary displays the **Entries by Day** screen.
3. Tap , and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.
   - If you want to browse between timesheets, tap or on the header.

- If you still want to review each timesheet line in detail, tap a timesheet entry. On **Entries by Day**, you can tap an entry to view the **Log Entry** sreen.

Approve or Reject an Expense Sheet

1. On **Expense Sheet Approval**, tap the expense sheet that you need to approve.
2. On **Expense Sheet** (or **Mileage Sheet**), take any of the following actions:
   - Tap , and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.
   - Tap **Receipt** if you want to view any available attachment.
   - If you still want to review each expense sheet (or mileage sheet) in detail, tap a line. Tap **Back** after your review.

On **Expense Sheet**, tap or on the header to browse between expense sheets.

Approve or Reject an Purchase Order

1. On **PO Approval**, tap the purchase order that you need to approve.
2. On **Purchase Order**, take any of the following actions:
   - Tap , and tap **Approve**, **Undo Approve/Reject**, or **Reject**.
   - If you still want to review each purchase order in detail, tap a line. Tap **Back** after your review.

On **Purchase Order**, tap or on the header to browse between purchase orders.

Approve or Reject a Vendor Invoice

1. On **Vendor Invoice Approval**, tap the vendor invoices that you need to approve.
2. On **Vendor Invoice**, take any of the following actions:
   - Tap , and tap **Approve**, **Undo Approve/Reject**, or **Reject**.
   - Tap **Vendor Invoice** to view any available attachment.
   - If you still want to review the vendor invoice in detail, tap a line. Tap **Back** after your review.

On **Vendor Invoice**, tap or on the header to browse between vendor invoices.

Settings

Modify Server URL

1. Tap , then **Settings**.
2. Tap **Forget Me on this Device**. All options and favorites are lost.
3. On the login screen, tap **Server URL**.
4. In **Server URL**, tap to delete the current value, then enter the new URL.
5. Tap **Connect**.

Set Minute Interval for Hour Fields

1. Tap , then tap **Settings**.
2. Tap the **Registration Unit** field, then tap a value.
   - **1 minute (0-59)**
   - **2 minutes**
   - **5 minutes**
   - **10 minutes**
   - **15 minutes**
   - **30 minutes**
   - **Tenths (0, 6, 12, 18, etc.)**
3. Tap **Done**.

Configure Deltek Touch Settings

1. Tap , then tap **Settings**.
2. You can modify the following:
   - **Username** – To change the current user, tap **Forget Me on this Device**, and log on again.
   - **Open In** – Tap the field, and tap the default screen that you want to display when you open Deltek Touch. For 2.2 and 2.1, tap **Timesheet**, **Items for Approval**, **Expense Sheet**, **Quick Capture**, **Mileage Sheet**, or **Summary**. For 2.0, tap **Timesheet**, **Expense Sheet**, **Quick Capture**, **Mileage Sheet**, or **Summary**. For X1, tap **Timesheet** or **Summary**.
   - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Deltek Touch (for example, the number of times you access the application and submit timesheets). Deltek uses this information to determine what features are being used in the application. No confidential information (such as projects, clients, or usernames) is tracked. This anonymous information is only available to Deltek and is not publicly available.

- **Use Week Numbers** – *For REST, this setting is only available in weekly mode.* Slide to turn on or off. Setting it to **ON** displays the week number on the **Weeks**, **Timesheet**, and **Summary** screens.
- **Keep on Timesheet as Default** – Slide to turn on **Keep on Timesheet as Default** by default on the **Add Project** screen. Turning this on means that the **Keep on Timesheet** switch on the **Timesheet Line** screen is turned on by default when adding a new line.
- **Registration Unit** – *This field only displays when **Submit Mode** is set to **Weekly**.* Tap the field, then tap a minute interval of the time picker.
- **Show Approvals –** *This setting is only available in MScript*.Toggle the switch to ON to display **Items for Approval** on the sliding menu.
- **Submit Mode** – This field displays which mode is used in submitting the timesheet. It displays either **Daily** or **Weekly**.
  - The **Daily** submit mode only allows you to submit single days at a time from the **Timesheet** screen. In this mode, Deltek Touch displays the **Calendar** screen instead of the **Weeks** screen when you tap . In addition, Deltek Touch does not include non-working days from the **Overdue** status in this mode.
  - The **Weekly** submit mode allows you to submit the current week either from the **Timesheet** or **Summary** screen. In this mode, Deltek Touch displays the **Weeks** screen instead of the **Calendar** screen when you tap .
- **Week Start** – *This field only displays when **Submit Mode** is set to **Daily**.* Tap to select whether the weeks on the **Calendar** and **Timesheet** screens start on **Sunday** or **Monday**.
- **Show Mileage** – Toggle the switch to ON to display **Mileage Sheet** on the sliding menu.
- **Show Expense** – Toggle the switch to ON to display **Expense Sheet** and **Quick Capture** on the sliding menu.
- **Privacy Policy** – Tap to access the Legal Notices and Privacy Statement information page of Deltek.
- **About** – Tap to view the device and operating system information, which includes the following:
  - Device Type
  - Operating System
  - User Agent Name and Version
  - Application (Web App or Native App) Version
  - Touch Sever Version
  - Web Service Version
  - Core System Version
  - Touch Server Build Version
  - Web App Build Version

  You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek support if you have an issue with the application.

- **Log Out** – Tap to exit the device, requiring you to enter your password or PIN on your next login. You can also log out by tapping , then tapping **Log Out**.
- **Forget Me on this Device** – Tap to delete the server URL and your user credentials from the application, requiring URL, user ID, and password on the next login.

Appendix: Screen Details

The section describes the various screens that Deltek Touch supports:

Expense

Type	Screen
Expense Sheets	This screen displays the list of expense sheets available for the logged in user. ▪ You can select and view an expense sheet by scrolling through the list and tapping the expense sheet, which are sorted descending with most recent at the top. The number of reports displayed depends on your settings. Tap an expense sheet to view details. ▪ You can also create an expense sheet by tapping . The **Expense Sheet** screen then displays.

Expense Sheet	This screen displays a specific expense sheet and its details.
	▪ You can submit or duplicate the expense sheet, attach a receipt, or add a new expense sheet line by tapping and then tapping the corresponding option.
	▪ To select a currentcy, tap the **Currency** field.
	▪ To copy an expense sheet:
	  ▪ Tap and hold an expense sheet, then tap **Duplicate**.
	  ▪ On **Expense Sheet**, tap and then tap **Duplicate**.
	▪ To delete an expense sheet:
	  ▪ Swipe across the selected expense sheet in either direction (left-to-right or right-to-left), then tap **Delete**.
	  ▪ Tap **Delete** on the **Expense Sheet** screen.
	▪ To submit an expense sheet, tap an expense sheet. On **Expense Sheet**, tap and then tap **Submit**.

Expense Sheet Line	This screen displays a specific expense entry in the selected expense sheet. ▪ Tap to view the details of the selected expense sheet line, add an expense sheet line or attach a receipt. ▪ To add an expense line: ▪ On **Expense Sheets**, tap the expense sheet that you want to update. On **Expense Sheet**, tap then tap **New Line**.

Type	Screen
	- On **Expense Sheet**, tap an expense sheet line. On **Expense Sheet Line**, tap  and then tap **New Line**. - To copy an expense sheet line, on **Expense Sheet**, tap an expense sheet line. On **Expense Sheet Line**, tap  and then tap **New Line**. - To delete an expense sheet line, on **Expense Sheet**, tap an expense sheet line. On **Expense Sheet Line**, tap **Delete**.

Mileage

Type	Screen

Mileage Sheets	This screen displays the list of mileage sheets belonging to you (as the logged in user). There are two groupings for mileage sheets:
	Open — This is the default grouping when you tap **Mileage Sheet**. It displays all mileage sheets that are open for editing. All open mileage sheets have the **In Progress** status.
	All — Tapping this tab displays all mileage sheets that belong to you (as the logged in user). You use this grouping to edit or reopen submitted mileage sheets, or reopen rejected mileage sheets.
	- To select and view a mileage sheet, scroll through the list and tap the mileage sheet.
	- To create a mileage sheet, tap .
	- To copy a mileage sheet:
	  - Tap and hold a mileage sheet, then tap **Duplicate**.
	  - On **Mileage Sheet**, tap  and then tap **Duplicate**.
	- To delete a mileage sheet line:
	  - Swipe across the selected mileage sheet in either direction (left-to-right or right-to-left), then tap **Delete**.
	  - Tap **Delete** on the **Mileage Sheet** screen.

Mileage Sheet	This screen displays a specific mileage sheet and its details. You can submit or duplicate the mileage sheet, or add a new mileage sheet line by tapping . The options in the drop-down only become enabled when you enter any values on this screen.
Mileage Sheet Line	This screen displays a specific mileage entry in the selected mileage sheet. It allows you to view the details of the selected

Type	Screen
	mileage sheet line, add a mileage sheet line or attach a receipt by tapping . You can also select a currency by tapping the **Currency** field.

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