Deltek Touch Time & Expense for GovCon 1.2 (SaaS)

Time Collection Setup Guide

May 19, 2014

This edition published May 2014.

Contents

Overview

Deltek Touch Time & Expense for GovCon, the touch screen version of the Web-based Time Collection module, enables you to enter, view, and sign timesheet information and capture expenses from your touch screen device. This product is for iOS and Android devices and does not replace the current Deltek Mobile Time product for Blackberry devices.

To use Touch Time & Expense for GovCon, a server component must be installed on a Web server, which can be an existing Deltek Time & Expense Web server.

The official name of the application is *Deltek Touch Time and Expense for GovCon*. This document only uses it at first mention. The succeeding instances of the application name display Touch Time & Expense.

In addition, the application name in the Google Play and the Apple App Store displays *GovCon Time & Expense*.

This document provides instructions for the installation and configuration of Touch Time & Expense.

The following Deltek Time timesheet features are not available in Touch Time & Expense:

- **Interim Charges** — Interim charges cannot be created in Touch Time & Expense. However, interim charges already in timesheet can be charged. Interim charge edit does occur on timesheet sign.
- **Hours Proration** — Users with proration will only be able to view Entered hours. The proration of the hours still will occur on timesheet sign.
- **Reverse Timesheet** — Users will not be able to reverse timesheets within Touch Time & Expense. If timesheet class requires reverse timesheet, user must perform timesheet corrections in browser-based timesheet.
- **Line Level Approval** — Approvals should be performed in a browser-based timesheet screen.
- **Timesheet Print** – Users will not be able to print timesheet. They will need to use browser based timesheet to print.
- **Day Comments** — Users will not be able to enter day comments since time in/out and start/stop times are not supported.
- **Timesheet Comments** — Users will not be able to enter/view OVERALL timesheet comments/notes.

Specific users will not be able to use Touch Time & Expense based on their timesheet class business rules for the following Deltek Time & Expense features:

- **Time In/Out** — Users with timesheet classes will not be allowed to use Touch Time & Expense if this feature is enabled. This is checked at login.
- **Start/Stop Time** — Users with timesheet classes with this feature will not be allowed to use Touch Time & Expense if this feature is enabled. This is checked at login.
- **Single Sign On** — All users must provide authentication information. LDAP and database authentication are supported. If Deltek Time & Expense is configured for SSO, the system will require the user for authentication using the Active Directory password. If password is complex, consider using PIN authentication.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at far right.
2. In the **Annotations** pane that displays, click **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

If You Need Assistance

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

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Time & Expense Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

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 Time and Expense for Govcon 1.2 (SaaS) User Guide	This document contains detailed information and instructions on how to use various features of the application.
Deltek Touch Time and Expense for GovCon (SaaS) Cumulative Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.

Supported Mobile Operating Systems

Touch Time & Expense supports mobile devices that run on the following operating systems:

- Apple iOS 6.1 and higher
- Android 4.x and higher

Prerequisites

Before you begin the installation and setup of Touch Time & Expense, it is important to understand the following information:

- Touch Time & Expense supports applications from the *Apple App Store* and *Google Play*. You may be able to use the native browser of your device to enter your organization's Touch Time URL.

> The Touch Time & Expense URL has the format https://**<server>**/deltektouch/govcon/time, where **<server>** refers to the host name of your Touch server.

Deltek Touch Time & Expense Setup

Use the following check list as a guide for setting up Touch Time & Expense Collection.

Step	Procedure	✓
1	Enable the PIN option	
2	Set UDT short labels	
3	Set default view and sort options	
4	Configure charge lookup options	
5	Define Batch Expense Type (Optional — Only if Expense is licensed)	

For new installation, you need to perform all of the steps above to set up Touch Time & Expense Collection. For upgrade installation, you do not need to perform steps 1, 2, 3, and 4.

Step 1: Enable the PIN Option

This step is optional. If configured, users will be allowed to create a 4-digit PIN that they can use to log on to Touch Time & Expense instead of a password. The PIN becomes a key for encryption which contains the user's login credentials. The PIN is not stored on device and is used to decrypt user's credentials.

The PIN is not automatically synchronized when the user's password changes and it cannot be used to log on to the desktop version of the Time Entry module.

If user's associated password changes, the user's PIN will fail authentication and the user will be required login with new password by tapping **Change User** option. After login, the system will give user the ability to create a new PIN.

To enable the PIN option, complete the following steps.

1. On the Deltek Time & Expense with ESS Administration menu, click **Product Configuration » General Configuration**.
2. On the General Options tab, select the **Allow PIN use on mobile device** check box.
3. Click **Save**.

Employees who want to use a PIN must create it during first login or must enable the **PIN** option on the Touch Time & Expense Settings screen.

Step 2: Set UDT Short labels

Because mobile devices have a more limited screen space, you may want to create abbreviated versions of UDT labels.

To set UDT short labels for Touch Time, complete the following steps:

1. On the Deltek Time & Expense with ESS Administration menu, click the **Product Configuration » General**.
2. On the UDT tab, enter an abbreviated version for each applicable UDT in the **Mobile Label** column. For example, if UDT 01 is Account, the abbreviated version could be Acct.

Step 3: Set Default View and Short Options

Set the default options for both Timesheet View (1 column/ 6 rows or 1 column/3 rows) and Timesheet Line Sort (sort by **Project ID**, **Project Description**, or **Line Number**). Employees can later override these default options from the **Options** menu within Touch Time.

To set the default options, complete the following steps

1. On the Deltek Time & Expense with ESS Administration Time menu, click the **Settings » Time Configuration**.
2. On the Miscellaneous tab, click **Mobile Defaults » Timesheet View**, and select the number of lines (3 or 6) that you want to display on the timesheet.

   This option only impacts Deltek Mobile Time for Blackberry legacy product.

3. On the **Timesheet Line Sort** list, select the default for sorting timesheet lines: **UDT 01**, **UDT 02**, or **Line Number**.
4. Click **Save**.

Default View only applies to Mobile Time for Blackberry devices.

Step 4: Configure Charge Lookup Options

Configure the charge lookup options that will be available to employees on the Search Charge Lookup screen of Touch Time & Expense.

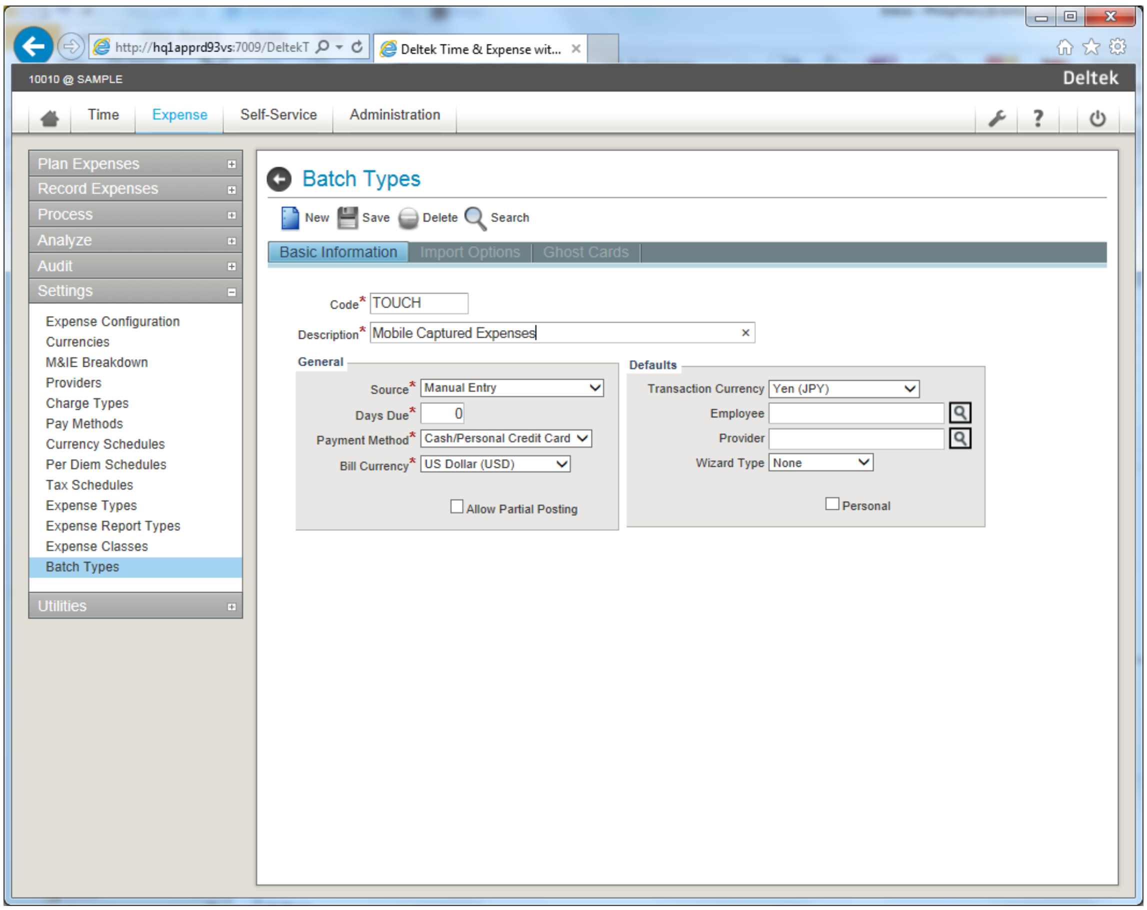
To set the default options, complete the following steps:

1. On the Deltek Time & Expense with ESS Time menu, click **Settings » Timesheet Classes**.
2. On the Basic Information tab, use the Search feature to select the Timesheet Class that you want to configure for Touch Time.
3. Select the check box next to each lookup option you want to enable in the **Costpoint/Mobile Time Lookup** option:
   - **Show Project**
   - **Show MO** (this option is available only to Costpoint users)
   - **Show Account**
4. Click **Save**.

While the Basic Information tab screen is open, confirm that the **Time In/Out** and **Start/Stop Times** options are disabled. If these options are enabled, members of this timesheet class will not be able to access Touch Time & Expense.

Step 5: Define Batch Expense Type

This step only applies if you are licensed for Deltek Expense and plan to utilize the expense capture capabilities. It is necessary to set up a Batch Type since capturing of out-of-pocket expenses leverages the same framework as the Batch Expense feature — the ability to import centralized billed credit card transactions. The captured out-of-pocket expenses will be assigned to the batch type created in this step.



The required fields for the Batch Type are as follows:

- **Code**
- **Description**
- **Source** — Must be “Manual Entry”
- **Payment Method** — Must assign an employee paid based payment method
- **Bill Currency** — Must be equal to Expense base currency