Deltek

Deltek Touch for Maconomy®

Touch 3.8 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 mobile device access means Deltek Touch keeps you informed and in control.

> **Attention:** 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.

> **Note:** 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 in the *Apple App Store* displays *Deltek Touch for Maconomy*.

Mobile Device Requirement

Deltek Touch for Maconomy supports mobile devices that run on Apple iOS 13.0 (or higher).

Getting Started

This section includes a step-by-step guide to using Deltek Touch for the first time, setting up and managing your authentications, and regularly accessing the application.

Install Deltek Touch

Your Deltek Touch administrator sends an email containing a link that directs you to a page with a hyperlink. If the application is not yet installed, clicking the link directs you to the Apple App Store to download the application. If the application is already installed, clicking the link automatically populates the **Server URL** field in the application.

To download and install Deltek Touch:

1. Go to the Apple App Store, and search for the **Deltek Touch for Maconomy** application.
2. Download and install the application by tapping the appropriate buttons.

Initial Log In

When you first launch the application, you need your organization's Deltek Touch URL and credentials, and set up either a personal identification number (PIN) or biometrics. Your registered security PIN or biometric authentications are stored in your device to facilitate simplified subsequent logins.

To log on to Deltek Touch for the first time:

1. Tap **Deltek Touch** to launch the application.
2. In the **Server URL** field, enter your organization's Deltek Touch URL. Alternatively, you can click the link from your administrator's email, which automatically populates the field or directs you to download the application.

   Note:

   - For IIS Web server, the default URL is **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 for requests.
   - Your administrator can modify the default URL.

3. Tap **Connect**. If you are having connection problems, tap **Cancel** to check and fix the link if necessary.
4. On your first log in, the application prompts you to accept the **Terms and Use of Service**, and **Usage Statistics Tracking**. Tap the corresponding buttons.

   Note: When usage tracking is enabled, the number of times you access the application and how often you use certain features are tracked. Deltek Touch does not track any personal or confidential data, such as usernames, jobs, or clients. You can turn off usage tracking on the **Settings** screen at any time.

5. Tap the **Username** and **Password** fields to enter the corresponding values. If you have several roles, use the login name that corresponds to a particular role.

   If you are using Maconomy version 2.3 (or later), you can have multiple roles (for example, an employee in Company A and a project manager in Company B). These roles determine your access to access levels, actions, groups, and workspaces. Each role is assigned a login name, which you can use to log on to Deltek Touch.

   > **Note:** For more information on setting up your Maconomy, domain, or other credentials, see the Set Up Credentials section.

6. Tap **Log In**.
7. Enter a security PIN code, and re-enter it to confirm. Alternatively, you can use biometric authentication depending on your setup.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Set Up Authentications

Deltek Touch supports a two-layer authentication process and a variety of authentication methods, which determine user identity and ensure optimal security as well as seamless log in. This section includes information on how you can log on to Deltek Touch using your credentials, security PIN, and biometrics.

Set Up Credentials

Credential authentication is the first layer of the authentication process, and is required in order to connect Deltek Touch to Maconomy. It is the most basic authentication method, which requires you to provide your username and password. The first time you log in, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials depending on your setup.

You need to register your Maconomy or valid credentials again in some cases. The following are scenarios wherein you need to provide your current or new credentials:

- If your username or password is not stored on your device
- If your username or password is no longer valid because it expired or it is changed
- If the additional information you provided (for example, domain or refresh token) is no longer valid because it is expired or it is changed
- If you changed the Server URL, switched to a different user, reset your password or PIN, or tapped **Forget me on this device** on the **Settings** screen
- If you incorrectly entered your PIN 3 times in succession, or your fingerprint ID is not accepted after 3 attempts

Maconomy Credentials

You can use your Maconomy credentials to log on to Deltek Touch when this login setup is enabled.

To log in using your Maconomy credentials:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your Maconomy username and password, and tap **Log In**.

When the credentials are valid and the Maconomy authentication is successful, you can proceed with the Touch authentication setup.

3. Tap either **Using Fingerprint**, **Using Face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
4. Tap **Continue**.
5. Depending on the authentication method you selected on step 3, set up your biometrics or PIN code.

> **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Domain Credentials

You can use your company's network credentials to log on to Deltek Touch when this login setup is enabled.

To log in using your domain credentials:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, tap the **Domain** field, and select the applicable domain from the drop-down list. If there is only one applicable domain in your setup, it is automatically selected.
3. Enter your domain username and password, and tap **Log In**.

   When the credentials are valid and the Maconomy authentication is successful, you can proceed with the Touch authentication setup.
4. Tap either **Using Fingerprint**, **Using Face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
5. Tap **Continue**.
6. Depending on the authentication method you selected on step 4, set up your biometrics or PIN code.

> **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Azure Credentials

Azure is a third-party Single Sign-On (SSO) solution, and one of the supported standard authentications for Deltek Touch and Maconomy. You can use your Azure credentials when your applications are configured to use this login setup.

The **Azure Login** toggle switch displays on the Touch **Login** screen. When an SSO solution is enabled, the authentication toggle switch is on by default. Toggle the switch off if you prefer to use your Maconomy credentials to log in.

To log in using your Azure credentials:

1. Tap **Deltek Touch** to launch the application.
2. On the Touch **Login** screen, enter your Azure username.
3. Toggle the **Azure Login** switch to enable the SSO authentication method.

4. Tap **Log In**.
5. Enter your password on the Azure **Login** screen, and tap **Log In**.

   When the credentials are valid and the Maconomy authentication is successful, you can proceed with the Touch authentication setup.
6. Tap either **Using Fingerprint**, **Using Face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
7. Tap **Continue**.
8. Depending on the authentication method you selected on step 6, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

OneLogin and Okta Credentials

OneLogin and Okta are supported standard authentications for Deltek Touch and Maconomy. Depending on your setup, you can use either your OneLogin or Okta credentials.

Either the **OneLogin**, or **Okta Login** toggle switch displays on the Touch **Login** screen. When an SSO solution is enabled, the authentication toggle switch is on by default. Toggle the switch off if you prefer to use your Maconomy credentials to log in.

To log in using either your OneLogin or Okta credentials:

1. Tap **Deltek Touch** to launch the application.
2. On the Touch **Login** screen, enter either your OneLogin or Okta username.
3. Toggle either the **OneLogin** or **Okta Login** switch to enable the SSO authentication method.
4. Tap **Log In**.
5. Enter your password either on the OneLogin or Okta **Login** screen, and tap **Log In**.

   When the credentials are valid and the Maconomy authentication is successful, you can proceed with the Touch authentication setup.
6. Tap either **Using Fingerprint**, **Using Face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
7. Tap **Continue**.
8. Depending on the authentication method you selected on step 6, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Two-Factor Authentication (2FA)

For two-factor authentication (2FA), you need to provide two different types of information to verify your identity and log in. You are required to log on to Deltek Touch using your credentials and to provide a verification passcode.

Several authentication tools, like Duo Mobile and Google Authenticator, are supported to provide one-time passcodes. You must install the authentication app required by your organization, and enroll the app the first time you log in. Touch and your authentication app may be on one or separate devices.

Use 2FA on iOS 14 (or lower)

> **Note:** Use these steps to set up your unenrolled 2FA app the first time you log on your iOS device with iOS 14 (or lower), and Touch app version 3.8 (or lower).

You must enroll your 2FA app whether it is stored on the same device as Touch or on a different one. Prior to enrollment and depending on your setup, you may also be required to provide a temporary access token which is sent to your registered email address.

To set up your 2FA account and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **2FA Account Setup** screen, take one of the following steps:
   - To enroll a 2FA app on the same device:
     a) Tap **Open 2FA App**.
     b) On the 2FA app, add an account or use an existing account then generate and copy a passcode.
     c) On the **2FA Account Setup** screen, paste or enter the passcode.
     d) Tap **OK**.
   - To enroll a 2FA app from a different device:
     a) On the **2FA Account Setup** screen, tap the link below the last step.
     b) Scan the QR code using your authenticator app. After scanning the code, your account is added automatically.
     c) On the **QR Code** screen, enter the passcode.
     d) Tap **OK**.
   - To enroll a 2FA app with access token required:
     a) Tap the **Email Token** button to receive an access token on your registered email address.
     b) Enter the access token on the **Token** field and tap **OK**.
     c) Enroll your 2FA app. Take one of the following steps:
        - To enroll a 2FA app on the same device:
          a) Tap **Open 2FA App**.
          b) On the 2FA app, add an account or use an existing account then generate and copy a passcode.
          c) On the **2FA Account Setup** screen, paste or enter the passcode.
          d) Tap **OK**.

- To enroll a 2FA app on the different device:
    a) On the **2FA Account Setup** screen, tap the link below the last step.
    b) Scan the QR code using your authenticator app. After scanning the code, your account is added automatically.
    c) On the **QR Code** screen, enter the passcode.
    d) Tap **OK**.

4. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
5. Tap **Continue**.
6. Depending on the authentication method you selected on step 4, set up your biometrics or PIN code.

> **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Enter a New 2FA PIN on iOS 14 (or lower)

The 2FA PIN expires automatically after 3 months by default. In addition, it expires when you switch to a different user, change your password, reset a PIN, or tap **Forget me on this device** on the **Settings** screen. In these scenarios, you have to enter a new 2FA PIN.

To enter a new 2FA PIN:

1. On the **Login** screen, enter your username and password, and tap **Log In**.
2. Take one of the following steps:
    - Use your 2FA app to generate and copy a passcode. Your 2FA app may be on the same device where Touch is installed or on a different one.
    - Tap **Logging in from a new device? Click here** to receive a reset token via email. Copy the reset token, and paste or enter the code on the **Enter Token** screen.

Use 2FA on iOS 15 (or higher)

You can automatically enroll Apple Passwords or Okta Verify using the 2FA app picker on the **Set up a Two Factor Authentication (2FA) App** screen. You can also manually enroll your device using any of the following 2FA apps: Duo Mobile, Google Authenticator, Microsoft Authenticator, or SecureAuth Authenticate with either an activation code or a QR code. For instructions on how to use a QR code to enroll, refer to the SecureAuth Authenticator section. Note that if your organization requires an access token, you have to provide the token prior to activating your 2FA app.

The following are the high-level steps to set up your unenrolled 2FA app the first time you log on your iOS device with iOS 15 (or higher) and Touch app version 3.8.1, and to log in to Deltek Touch.

1. **Launch Deltek Touch on your iOS device.**
2. **Log in with your username and password.**
3. **Enter an access token if required.**
4. **Enroll your 2FA app**.
   - Enroll automatically using the 2FA app picker.
   - Enroll manually using an activation key.
   - Enroll manually by scanning the QR code.
5. **Copy the code from your 2FA app to Touch.**
6. **Log in with Biometrics, or a Security PIN.**

Apple Passwords

You can automatically enroll Apple Passwords using the 2FA app picker. Note that you have to add an Apple Passwords account first, or select an existing account to proceed with using the app to generate a code. When you have successfully enrolled, this is set as your preferred 2FA app in Touch even after your PIN expires.

To set up your 2FA account on Apple Passwords and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

   > **Note:** If your organization does not require an access token, you do not have to go through this step.
4. On the **Set up a Two Factor Authentication (2FA) app** screen, take the following steps:
   a. Tap **List**.
   b. Tap **Apple Passwords**, then **Done**.

      Apple Passwords displays.
   c. On the **Autofill Password** screen, add an Apple Passwords account if needed, or select your existing account to proceed to the **Passwords** screen.
   d. Tap the **Verification Code** field, then tap **Copy Verification Code**.
   e. On the **Set up Two Factor Authentication (2FA) app** screen, paste the code in the **Code** field, then tap **OK**.
5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Duo Mobile

You can manually enroll Duo Mobile using either the activation key or QR code provided in Touch.

To set up your 2FA account on Duo Mobile and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

> **Note:** If your organization does not require an access token, you do not have to go through this step.

4. On the **Set up a Two Factor Authentication (2FA) app** screen, copy the activation code then take the following steps:
   a. Open **Duo Mobile**.
   b. Tap **Use activation code**.
   c. Tap **Add other account**.
   d. Paste the activation code in the **Activation code** field, then tap **Next**.
   e. Add your account details.
   f. Copy the code.
   g. In Touch, paste the code in the **Code** field then tap **OK**.
5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

> **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Google Authenticator

You can manually enroll Google Authenticator using either the activation key or QR code provided in Touch.

To set up your 2FA account on Google Authenticator and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

> **Note:** If your organization does not require an access token, you do not have to go through this step.

4. On the **Set up a Two Factor Authentication (2FA) app** screen, copy the activation code then take the following steps:
   a. Open **Google Authenticator**.
   b. Tap **Enter a setup key**.
   c. Add your account details, paste the activation code in the **Key** field, then tap **Done**.

   d. Copy the code.
   e. In Touch, paste the code in the **Code** field then tap **OK**.

5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Microsoft Authenticator

You can manually enroll Microsoft Authenticator using either the activation key or QR code provided in Touch.

To set up your 2FA account on Microsoft Authenticator and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

   > **Note:** If your organization does not require an access token, you do not have to go through this step.
4. On the **Set up a Two Factor Authentication (2FA) app** screen, copy the activation code then take the following steps:
   a. Open **Microsoft Authenticator**.
   b. Sign in with your Microsoft account, or add an account.
   c. In the **Secret key** field, paste the activation code then tap **Finish**.
   d. Copy the code.
   e. In Touch, paste the code in the **Code** field then tap **OK**.
5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Okta Verify

You can automatically enroll Okta Verify using the 2FA app picker. When you have successfully enrolled, this is set as your preferred 2FA app in Touch even after your PIN expires.

To set up your 2FA account on Okta Verify and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

   > **Note:** If your organization does not require an access token, you do not have to go through this step.
4. On the **Set up a Two Factor Authentication (2FA) app** screen, take the following steps:
   a. Tap **List**.
   b. Tap **Okta Verify**, then **Done**.

      Okta Verify displays.
   c. Copy the code.
   d. On the **Set up Two Factor Authentication (2FA) app** screen, paste the code in the **Code** field, then tap **OK**.
5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

SecureAuth Authenticator

You can only manually enroll SecureAuth Authenticate using the QR code provided in Touch. This 2FA app does not support the use of an activation key.

To set up your 2FA account on SecureAuth Authenticator and log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.

3. On the **Your organization uses Two Factor Authentication (2FA)** screen, tap the **Email Token** button to receive an access token on your registered email address, then enter the token in the **Token** field, and tap **OK**.

> **Note:** If your organization does not require an access token, you do not have to go through this step.

4. On the **Set up a Two Factor Authentication (2FA) app** screen, take the following steps:
    a. Take a photo of the QR code shown in Touch. Open the photo on another device (for example, a laptop).
    b. Open **SecureAuth Authenticate**.
    c. Tap the plus icon, then tap **Connect with QR Code**.
    d. Scan the QR code shown in the photo on the other device.
    e. On the **Set up Two Factor Authentication (2FA) app** screen, enter the code in the **Code** field, then tap **OK**.
5. Tap either **Using your fingerprint**, **Using your face**, or **Using a PIN code** to select the authentication method you prefer to use for the next time you log on to Deltek Touch.
6. Tap **Continue**.
7. Depending on the authentication method you selected on step 5, set up your biometrics or PIN code.

> **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Enter a New 2FA PIN on iOS 15 (or higher)

The 2FA PIN expires automatically after 3 months by default. In addition, it expires when you switch to a different user, change your password, reset a PIN, or tap **Forget me on this device** on the **Settings** screen. In these scenarios, you have to enter a new 2FA PIN.

To enter a new PIN code after it expires:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On **Your Two Factor Authentication PIN has expired** screen, tap the **2FA app you enrolled with** link.
4. On the 2FA app picker, select the 2FA app you use, then tap **Done**. If your 2FA app is not listed in the picker, manually open your 2FA app.

> **Note:** Any app you select is set as your preferred 2FA app in Touch, and the next time your 2FA PIN expires, Touch opens your 2FA app automatically and you do not have to select it from the picker anymore.

5. Copy the generated code from your 2FA app.

6. In Touch, paste the new code in the **Code** field then tap **OK**.

> **Attention:** If you are using Apple Passwords or Duo Mobile as your 2FA app, then your 2FA PIN expires and you try to obtain a new code from either of the two apps, a verification code error displays. The error does not affect any functionalities in both apps or in Touch, and you can still get a new PIN when you close the error message.

Set Up 2FA on a New Device

When you change or lost the device which contains your enrolled 2FA app, you must install and enroll the 2FA app required by your organization on your new device. You can continue to log in to Touch with your PIN or biometrics, however, you must provide a new 2FA passcode when it expires. Once it expires, you can set up your 2FA app on your new device.

To set up 2FA on a new device:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   Depending on your setup, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials.
3. On the **Maconomy 2FA Passcode** screen, tap **Logging in from a new device? Click here** to receive a reset token via email.
4. On the **Enter Token** screen, enter the reset token.
5. On the **2FA Account Setup** screen, take one of the following steps:
   - To enroll a 2FA app on the same device where Touch is installed:
     a) Tap **Open 2FA App**.
     b) On the 2FA application, add an account or use an existing account then generate and copy a passcode.
     c) On the **2FA Account Setup** screen, paste or enter the passcode.
     d) Tap **OK**.
   7. To enroll a 2FA app from a different device where Touch is installed:
     a) On the **2FA Account Setup** screen, tap the link below the last step.
     b) Scan the QR code using your authenticator app. After scanning the code, your account is added automatically.
     c) On the **QR Code** screen, enter the passcode.
     d) Tap **OK**.

Set Up Security PIN and Biometrics

Security PIN and biometric authentications are the second layer of the authentication process, and allow you to verify your identity for the next time you log on to the application.

Security PIN Authentication

For initial login, Deltek allows you to create a security PIN. The following are the PIN code requirements:

- **Minimum PIN Length** – The minimum PIN code length is six digits by default. However, your system administrator can modify this requirement to allow a minimum of 4 up to 12 digits.
- **PIN Complexity** – You cannot use repeating or sequential digits (for example, 111111 or 123456). However, your system administrator can turn off this requirement.
- **Unique PIN History** – You cannot use the same PIN again after it expires. Your system administrator can modify this requirement to prohibit reusing your previous 6 PINs at the maximum.
- **PIN Expiration** – Your PIN is valid up to 90 days by default. However, your system administrator can modify or remove this requirement. If you switch to a different user, change your password, tap **Forget me on this device** on the **Settings** screen, or uninstall Deltek Touch, the expiration resets.

To set up your security PIN:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   The first time you log in, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials depending on your setup.
3. Tap **Using a PIN code** to use PIN authentication for the subsequent times you log on to Deltek Touch.
4. Tap **Continue**.
5. Enter a PIN code, and tap the check mark.
6. Re-enter the PIN code to confirm, and tap the check mark.

Biometric Authentication

Deltek Touch supports fingerprint or Touch ID, and face recognition or face ID authentications.

To set up your biometric authentication:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your username and password, and tap **Log In**.

   The first time you log in, you can use either your Maconomy, domain, Azure, OneLogin, or Okta credentials depending on your setup.
3. Tap **Using Fingerprint**, or **Using Face** to use biometric authentication for the subsequent times you log on to Deltek Touch.
4. Tap **Continue**.
5. On the **Deltek Maconomy Touch Biometric Sign On** screen, take one of the following steps:
   - To use fingerprint authentication, lift and rest your finger on the fingerprint sensor of your device.
   - To use face recognition, hold your phone at a recommended distance, and position your face in front of your device's camera.

Routine Log In and Log Out

This section includes information on your day-to-day access to Deltek Touch.

Routine Log In

When you have successfully logged on to Deltek Touch for the first time, your registered security PIN or biometric authentications are stored in your device to facilitate simplified subsequent logins. You can modify your preference, and switch from using PIN to biometrics, or vice-versa on the **Settings** screen.

Use Security PIN or Biometrics

Depending on your initial setup, you can use either security PIN or biometrics instead of entering your username and password the next time you log in the application.

To log on to Deltek Touch again using either your security PIN or biometrics:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, take one of the following steps:
   - If you set up a security PIN on your initial log in, enter your PIN code on the **PIN** screen, and re-enter the PIN to confirm.
   - If you set up either Touch ID or Face ID on your initial log in, use either fingerprint or face recognition.

Switch from PIN to Biometrics

You can enable biometric authentication at any time provided it is included in your Deltek Touch setup.

To use biometric authentication on your next log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, enter your PIN code, and tap the check mark.
3. Re-enter the PIN code to confirm, and tap the check mark.
4. Tap , and go to **Settings**.
5. On the **Settings** screen, toggle the **Log in using Fingerprint**, or **Log in using Face** switch on.
6. On the **Deltek Maconomy Touch Biometric Sign On** screen, set up either your Touch or Face ID. Take one of the following steps:
   - To use fingerprint authentication, lift and rest your finger on the fingerprint sensor of your device.
   - To use face recognition, hold your phone at a recommended distance, and position your face in front of your device’s camera.

Switch from Biometrics to PIN

You can shift from using biometrics to PIN code authentication any time on the **Settings** screen.

To use PIN authentication on your next log in:

1. Tap **Deltek Touch** to launch the application.
2. On the **Login** screen, log in using either your Touch or Face ID, depending on your initial setup.
3. Tap , and go to **Settings**.
4. On the **Settings** screen, toggle the **Log in using Fingerprint**, or **Log in using Face** switch off, which will automatically log you out of the application.

5. On the **Login** screen, enter your username and password, and tap **Log In**.
6. Enter a PIN code, and tap the check mark.
7. Re-enter the PIN code to confirm, and tap the check mark.

Changing Users, PINs, and Passwords

This section includes information on how you can log in using a different user, reset your security PIN, and update your password.

Change the User

Use these steps to log in using a different user on the same device.

To change the user:

1. From the **Login** screen, tap **Change User**.
2. The application prompts you to accept the **Terms and Use of Service**, and **Usage Statistics Tracking**. Tap the corresponding buttons.

   > **Note:** When usage tracking is enabled, the number of times you access the application and how often you use certain features are tracked. Touch does not track any personal or confidential data, such as usernames, jobs, or clients. You can turn off usage tracking on the **Settings** screen at any time.

3. Tap the **Username** and **Password** fields to enter the corresponding values. You can use your Maconomy, domain, Azure, OneLogin, or Okta credentials depending on your setup.

   > **Note:** For more information on setting up your Maconomy, domain, or other credentials, see the Set Up Credentials section.

4. Tap **Log In**.
5. Enter a security PIN code, and re-enter it to confirm. Alternatively, you can use biometric authentication.

   > **Note:** For more information on setting up your security PIN or biometrics, see the Set Up Security PIN and Biometrics section.

Reset a PIN

Use these steps to reset your PIN code.

To reset your security PIN:

1. From the **Login** screen, tap **Reset PIN**.
2. Enter a new PIN code, and tap the check mark.
3. Re-enter the PIN code to confirm, and tap the check mark.

> **Note:** For more information on the PIN code requirements, see the Security PIN Authentication section.

Update a Password

You can update your password when you are on REST Touch.

Change a Password

Use these steps to change your password.

To change your password:

1. From the **Login** screen, tap **Change User**.
2. The application prompts you to accept the **Terms and Use of Service**, and **Usage Statistics Tracking**. Tap the corresponding buttons.

   > **Note:** When usage tracking is enabled, the number of times you access the application and how often you use certain features are tracked. Touch does not track any personal or confidential data, such as usernames, jobs, or clients. You can turn off usage tracking on the **Settings** screen at any time.

3. Enter your username. You can use your Maconomy, domain, Azure, OneLogin, or Okta username depending on your setup.

   > **Note:** For more information on setting up your Maconomy, domain, or other credentials, see the Set Up Credentials section.

4. Tap **Change Password**.
5. Enter your old and new passwords, and tap **Done**.

Reset a Password

Use these steps to reset your password.

To reset your password:

1. From the **Login** screen, tap **Change User**.
2. The application prompts you to accept the **Terms and Use of Service**, and **Usage Statistics Tracking**. Tap the corresponding buttons.

   > **Note:** When usage tracking is enabled, the number of times you access the application and how often you use certain features are tracked. Touch does not track any personal or confidential data, such as usernames, jobs, or clients. You can turn off usage tracking on the **Settings** screen at any time.

3. On the **Login** screen, tap **Forgot Your Password**, and tap **Yes** to confirm.
4. Check your email for the reset token.
5. Enter the token in Deltek Touch, and tap **Done**.

6. Enter your new password, and tap **Done**.

Session Timeout

A session timeout is a software security standard that logs you out of an application after a period of inactivity. With Deltek Touch, session timeouts occur either an hour after authentication, or after 20 minutes of inactivity by default. Enter your security PIN or biometrics, whichever authentication method is enabled, to renew your session.

Log Out

You can log out of Deltek Touch by taking any of the following steps:

8. Press the **Home** button of your device.
9. Tap ☰, and tap **Log Out**.

> **Note:** Tap **Forget me on this device** on the **Settings** screen to remove your credentials, and favorites from your device. Favorites are saved combinations of activities, tasks, and jobs, which enable you to have easy access to your timesheet data. On your next log in, you are required to enter your organization's Deltek Touch URL, username, and password.

Screen Display

This section includes the available icons and descriptions in Deltek Touch.

Deltek Touch Icons and Descriptions

Icon	Description
Sliding Menu	This icon displays the Deltek Touch menu. When you tap the icon, the menu slides into view, and you can navigate to any of the following screens: 10. Timesheet 11. Summary 12. Expense Sheet 13. Quick Capture 14. Mileage Sheet 15. Purchase Order 16. Absence Requests 17. Allowance Requests 18. Approvals 19. Rejections 20. Settings 21. Help 22. Log Out Go to the **Settings** screen to display or hide a screen from the sliding menu.
Action Menu	This icon displays an expandable menu of additional actions you can perform on a specific screen.
On Toggle Switch	Toggle switches allow you to enable a setting or feature, or display a screen.
Plus icon	Depending on the screen you are viewing, you can tap this icon to add timesheets, expense and mileage sheets, purchase orders, or absence and allowance requests.
Save icon	Tap this icon to save new activities, tasks, and jobs, or any of your changes prior to exiting the screen or application.
Back / Forward arrows	These icons allow you to navigate to and from a screen.

Icon	Description
and Previous / Next arrows	These icons allow you to navigate to the previous or next item.
View Details	This icon allows you to view or add more details about a specific field, or select an option from a list.
Collapse / Expand	These icons allow you to display or hide details on a specific screen.
Search icon	This icon allows you to search for activities, tasks, jobs, favorites, and addresses on standard and advanced lookup screens.
Calendar	Tap this icon to view timesheets in a specific week or month. When you tap this icon, the **Weeks** or **Calendar** screen displays depending on your **Submit Mode** setting.
or	From the **Calendar** screen, tap these arrows to go to the previous or next month, or same month from the previous or next year.

Timesheet

This menu allows you to view your daily or weekly timesheets, add and edit work hours, and submit your time entries for approval.

To access the **Timesheet** screen, tap ☰ and go to **Timesheet**.

Timesheet Concepts

Use the **Timesheet** screen to easily manage your timesheets. You can:

- Record, calculate, and keep track of your work hours.
- Add activities, tasks, and more details to your reports.
- Create, store, and delete favorites for easy time registration.
- Submit your timesheets, and reopen submitted timesheets.

Timesheet Procedures

This section includes information to help you navigate the **Timesheet**, and **Timesheet Line** screens.

View Timesheet Lists and Timesheets

You can view your timesheets either on a given day from the **Calendar** screen, or on a specific period from the **Weeks** screen, depending on your **Submit Mode** setting.

Note: For more information on the **Submit Mode** setting, see the Submit a Timesheet procedure.

To view the timesheet list and your timesheets:

1. Tap ☰, and go to **Timesheet**.
2. Tap the calendar icon. Either the **Calendar** or the **Weeks** screen displays.

    23. On the **Calendar** screen, you can:

        a) Use the arrows to navigate to the previous or next month, or the same month on the previous or next year. The day you are viewing, and the same day on a different month or year are color-coded blue.

        b) Tap a date to navigate to the **Timesheet** screen of your selected day, and view your timesheets.

    24. On the **Weeks** screen, you can:

        a) Scroll through the timesheet list. The **Weeks** screen lists 13 periods at a maximum. You can move up or down a month by selecting either the top or bottommost period. A checkmark displays on the period you are viewing.

        b) Tap a period to navigate to the **Timesheet** screen of your selected week, and view your timesheets.

3. On the **Timesheet** screen, tap ◂ or ▸ to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.

Tip: Pull down on the **Timesheet** screen to manually refresh timesheet data at any time. A time stamp of your last update appears at the bottom of the screen.

View the Timesheet Status

You can view the status of your timesheets on the **Timesheet** screen, and from the timesheet list.

To view the timesheet status:

1. Tap ☰, and go to **Timesheet**.
2. View the timesheet status on the upper right corner, below the **Timesheet** screen header. Alternatively, tap 📅 to view the status either on the **Calendar** or **Weeks** screen.

   Note: You can view your timesheets either on a given day from the **Calendar** screen, or on a specific period from the **Weeks** screen, depending on your **Submit Mode** setting. However, both screens display the timesheet statuses in the same color coding scheme.
   For more information on the **Submit Mode** setting, see the Submit a Timesheet procedure.

   The following are the timesheet statuses:

   25. **Open** – The timesheet is created, and is open for editing. This status is color coded gray.
   26. **Due** – The timesheet is due, and pending submission. This status is color coded red.
   27. **Submitted** – The timesheet is submitted, but awaiting approval. This status is color coded green. Depending on your setup, you can reopen a submitted timesheet to make modifications.
   28. **Fully Approved** – The timesheet is fully approved, and ready for posting. This status is color coded blue, and is only applicable in REST.
   29. **Rejected** – The timesheet is rejected. This status is color coded yellow. You can review, and modify your rejected timesheets on the **Rejections** screen.

Search for a Job

The **Find Job** screen allows you to look up your jobs, all existing jobs, any favorites, and even recently used jobs. Depending on the configuration setting, you can view either both All and Favorites tabs, or only the Favorites tab.

To search and select a job for your timesheets:

1. Tap ☰, and go to **Timesheet**.
2. Tap ➕. The **Find Job** screen displays.
3. On the **Find Job** screen, take one of the following steps:

   30. Tap either the All or Favorites tab to filter the jobs, and tap a job from the list. Deltek Touch displays these tabs depending on your configuration.
   31. Enter the job number, name, or customer name on the **Search** field, and tap 🔍. Then tap a job from the search results, or tap **More…** to look up more jobs.
   32. Tap any of your recently used jobs, or any job from your job list.

4. Tap **Done** to save your changes, or tap ‹ to cancel and go back to the **Find Job** screen.

Enter Quick Time

You can manage your work hours from the **Timesheet** screen using the same timesheet line for each day.

> **Note:** For the same timesheet line to be available on your timesheets, toggle the **Keep on Timesheet** switch on when you create or update a timesheet line.

To add a quick time entry:

1. Tap , and go to **Timesheet**.
2. On the **Timesheet** screen, tap to view the timesheet list. Alternatively, tap or to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. On the timesheet line, tap the **Time Picker** field, and select the number of work hours.
4. Tap **Done**.

Enter Detailed Time

You can specify your work hours, and add descriptions, tasks, or activities from the **Timesheet Line** screen.

To add details to your time entry:

1. Tap , and go to **Timesheet**.
2. On the **Timesheet** screen, tap to view the timesheet list. Alternatively, tap or to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Tap a timesheet line you want to modify.
4. On the **Timesheet Line** screen, tap the fields, and enter information as needed.
5. Tap **Done**.

Create a Timesheet Line

When you create timesheet lines, you can charge time in your jobs and include details, such as descriptions and associated tasks or activities.

> **Note:** Before you submit a timesheet, ensure each timesheet line contains the minimum required hours, a job number, description, task, and activity.

To create a timesheet line:

1. Tap , and go to **Timesheet**.
2. Tap to select a day or period from the timesheet list. Alternatively, tap or on the calendar carousel to view the timesheets from the previous or to the next day or period.
3. Tap to add a timesheet line. The **Find Job** screen displays. Take one of the following steps:

33. Tap either the All or Favorites tab to filter the jobs, and tap a job from the list. Deltek Touch displays these tabs depending on your configuration.
34. Enter the job number, name, or customer name on the **Search** field, and tap . Then tap a job from the search results, or tap **More…** to look up more jobs.
35. Tap any of your recently used jobs or any job from your job list.

4. On the **Add Job** screen, modify the following information:

a) Add time in the **Hours** field.

b) Enter a timesheet line description in the **Daily Description** field.

> **Note:** When you are on Daily mode, and long text is enabled in Maconomy, you can only enter a description in the **Daily Description** field after saving the timesheet line. You have to reopen the **Timesheet Line** screen, then add the information.

c) Tap the **Task** field. The **Task** search screen displays. Take one of the following steps:

36. Enter a task number, or name on the **Search** field, and tap . Then tap a task from the search results, or tap **More…** to look up more tasks.
37. Tap any task from the task list.

d) Tap the **Activity** field. The **Activity** search screen displays. Take one of the following steps:

38. Enter an activity number, or name on the **Search** field, and tap . Then tap an activity from the search results, or tap **More…** to look up more activities.
39. Tap any activity from the activity list.

e) Toggle the **Keep on Timesheet** switch on for your timesheet line to be available on your timesheets. Otherwise, toggle the switch off.

f) Toggle the **Create Favorite** switch on to add the timesheet line to your favorites. Otherwise, toggle the switch off.

5. Tap **Done**.

Delete a Timesheet Line

Use these steps to delete a timesheet line.

To delete a timesheet line:

1. Tap , and go to **Timesheet**.
2. On the **Timesheet** screen, tap to view the timesheet list. Alternatively, tap or to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Scroll through the timesheet line list, and take one of the following steps:

40. Swipe across the timesheet line in either direction (left-to-right or right-to-left), and tap **Delete**.
41. Tap the timesheet line. The **Timesheet Line** screen displays. Tap **Remove from Timesheet**.

4. On the confirmation window, tap one of the following actions:

42. **Delete Entire Line** – If there is no time logged for this job on any other day in this timesheet, you can tap this action button to delete the entire line from the timesheet.

43. **Delete Time on this Day Only** – Tap the action button to delete the time registered on the selected day.

Note: 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.

Copy a Timesheet Line

Use these step to copy a timesheet line.

To copy a timesheet line:

1. Tap ☰, and go to **Timesheet**.
2. On the **Timesheet** screen, tap ▦ to view the timesheet list. Alternatively, tap ◂ or ▸ to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Scroll through the timesheet line list, and take one of the following steps:

   44. Press and hold a timesheet line, and tap **Copy Line**.
   45. Tap the timesheet line, and tap **Copy Timesheet Line**.

Add a Check-In Entry

Use these steps if you are required to check in for work.

To add a check-in entry:

1. Tap ☰, and go to **Timesheet**.
2. On the **Timesheet** screen, tap ▦ to view the timesheet list. Alternatively, tap ◂ or ▸ to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. On the **Timesheet** screen, tap **Check In**.
4. Tap the **Time Picker** field, and select the number of work hours. You can also tap › to view more details on the **Check In** screen.

   Tip: When check-in time is required to match the registered time in the timesheet prior to submission, the time balance is color coded red on the **Timesheet**, **Summary**, and **Approval** screens.

5. Tap **Done**.

Delete a Check-In Entry

Use these steps to delete a check-in entry.

To delete a check-in entry:

1. Tap ☰, and go to **Timesheet**.

2. On the **Timesheet** screen, tap to view the timesheet list. Alternatively, tap or to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. On the **Timesheet** screen, tap **Check In**.
4. Scroll through the timesheet line list, and swipe across the line in either direction (left-to-right or right-to-left), then tap **Delete**.

Create a Favorite

A favorite is a saved combination of project, task, and/or activity, which you can easily access when logging time entries. You can use your Maconomy Time Registration Favorites on Deltek Touch, and create new ones in the application.

To create a favorite:

1. Tap , and go to **Timesheet**.
2. Tap . The **Find Job** screen displays.
3. On the **Find Job** screen, take one of the following steps:
   46. Tap a job under the All tab.
   47. Enter the job number, name, or customer name on the **Search** field, and tap . Then tap a job from the search results, or tap **More…** to look up more jobs.
   48. Tap any of your recently used jobs or any job from your job list.
4. On the **Add Job** screen, take the following steps:
   a) Tap the **Task** and/or **Activity** field. On the **Task** or **Activity** search screen, look up and select a task or an activity.
   b) Toggle the **Create Favorite** switch on.
   c) On the confirmation window, edit the favorite name if needed, then tap **OK**.

Delete a Favorite

Use these steps to delete a favorite.

To delete a favorite:

1. Tap , and go to **Timesheet**.
2. Tap . The **Find Job** screen displays.
3. Tap **Favorites**.
4. On the Favorites tab, take one of the following steps:
   49. Scroll through the favorites list, and tap a job.
   50. Enter a name, number, or client in the **Search** field, and tap a job from the results.
5. Tap **Delete Favorite**. On the confirmation window, tap **Yes** to confirm.

Submit a Timesheet

Submitted timesheets are read-only, which you may reopen for editing if you have rights to do so.

Your system administrator sets up your **Submit Mode** setting, which is a read-only setting you can check on the **Settings** screen. The following are the submit modes:

51. **Daily** – With this submit mode, you can view, enter, and submit your daily timesheets from the **Timesheet** screen, and you can view your timesheet list from the **Calendar** screen.

- **Weekly** – With this submit mode, you can view, enter, and submit your weekly timesheets from the **Timesheet** and **Summary** screens, and you can view your timesheet list from the **Weeks** screen.

Prior to submission, all timesheet lines must contain a job number, the minimum required hours, descriptions, tasks, and activities.

To submit a timesheet:

1. Tap , and go to **Timesheet**.
2. On the **Timesheet** screen, tap to view the timesheet list. Alternatively, tap or to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Ensure time is logged in all your timesheet lines.
4. Tap **Submit.** On the confirmation window, tap **Submit**.

Reopen a Timesheet

Submitted timesheets are read-only. You can reopen a timesheet to make updates if you have rights to do so.

> **Note:** If your system administrator sets up your **Submit Mode** setting to **Weekly**, you can also reopen a timesheet on the **Summary** screen.

To reopen a submitted timesheet:

1. Tap , and go to **Timesheet**.
2. On the **Timesheet** screen, tap to view the timesheet list.
3. Tap a submitted timesheet.
4. On the Timesheet screen, tap then **Reopen**. On the confirmation window, tap **Reopen**.

   The timesheet status changes from **Submitted** to **In Progress**.

Summary

This menu allows you to access the **Summary** screen, which displays the summarized time registrations for a specific period.

To access the **Summary** screen, tap ☰ and go to **Summary**.

Summary Concepts

You can:

52. View a summary of your time registrations for a period.
53. Submit timesheets.

Summary Procedures

This section includes information to help you navigate the **Summary** screen.

View Period Summary

Use these steps to view the period summary.

To view the period summary:

1. Tap ☰, and go to **Timesheet**.
2. On the **Timesheet** screen, tap 📅 to view the timesheet list. Alternatively, tap ◂ or ▸ to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Tap ☰, and go to **Summary**.
4. Tap the Day or Job tab to view the summarized information for the selected day or period.

Submit a Timesheet

Use these steps to submit a timesheet.

To submit a timesheet:

1. Tap ☰, and go to **Timesheet**.
2. On the **Timesheet** screen, tap 📅 to view the timesheet list. Alternatively, tap ◂ or ▸ to view the timesheets from the previous or next day or period, and tap **Today** to view the timesheets for the current date.
3. Tap ☰, and go to **Summary**.
4. Tap **Submit**, and tap **Submit** to confirm. Alternatively, when your **Submit Mode** setting is **Daily**, submit single days at a time from the **Timesheet** screen.

Expense Sheet

This menu allows you to record and track your expenses, and submit your expense reports on the **Expense Sheet** screen.

To access the **Expense Sheet** screen, tap ☰ and go to **Expense Sheet**.

Expense Sheet Concepts

Use the **Expense Sheet** screen to easily manage your expense reports. You can:

54. Create expense sheets, and add details as needed, including receipts.
55. Modify, copy, or delete an expense sheet.
56. Submit your expense sheets for approval, and reopen submitted expenses.

Expense Sheet Procedures

This section includes information to help you navigate the **Expense Sheets**, and **Expense Sheet Line** screens.

Note: When you toggle the **Expense Sheet** switch on or off from the **Settings** screen, you can show or hide **Expense Sheet** and **Quick Capture** on the sliding menu.

View the Expense Sheet List

You can view your expense reports either in the Open or All tab on the **Expense Sheets** screen. The expense sheets are in descending order with the most recent report at the top of the list.

To view the expense sheet list:

1. Tap ☰, and go to **Expense Sheet**.
2. On the **Expense Sheets** screen, take one of the following steps:
   57. Tap the Open tab to view expense sheets which are in progress, and open for editing.
   58. Tap the All tab to view your editable expense sheets, and reopen submitted expense sheets.

   Tip: Pull down on the **Expense Sheet** screen to manually refresh expense sheet data at any time. A time stamp of your last update appears at the bottom of the screen.

View the Expense Sheet Status

You can view the status of an expense sheet on the expense sheet list, and on the **Expense Sheet** screen.

To view the expense sheet status:

1. Tap ☰, and go to **Expense Sheet**.

2. View the expense sheet status on the right side of each expense sheet on the list. Alternatively, tap an expense sheet from the list, and view the status on the upper left corner on the **Expense Sheet** screen. The following are the expense sheet statuses:

   59. **New** – The expense sheet is being created, and is not yet saved. This status is color coded gray.
   60. **In Progress** – The expense sheet is created, and is open for editing. This status is color coded gray.
   61. **Submitted** – The expense sheet is submitted, but awaiting approval. This status is color coded green. Depending on your setup, you can reopen a submitted expense sheet to make modifications.
   62. **Approved** – The expense sheet is approved. This status is color coded green.
   63. **Rejected** – The expense sheet is rejected. This status is color coded yellow. You can review, and modify your rejected expense sheets on the **Rejections** screen.

View an Expense Sheet

When you tap an expense sheet from the expense sheet list, you can view additional details (for example, attached receipts).

To view an expense sheet, and the expense sheet details:

1. Tap ☰, and go to **Expense Sheet**.
2. Tap either the Open or All tab.
3. Scroll through the expense sheet list, and tap an expense sheet to view the details.

Create an Expense Sheet

Use these steps to create an expense sheet.

> **Note:** The following conditions are only applicable on REST Touch:
>
> - The **Expense Justification** field is visible if a task requires an explanation for the transaction.
> - The **Purchase Order Number** and **Purchase Order Line** fields is visible if you are a subcontractor.

To create an expense sheet:

1. Tap ☰, and go to **Expense Sheet**.
2. Tap ➕. The **Expense Sheet** screen displays.
3. Enter an expense description in the **Description** field.
4. Select start and end dates in the **Period** field.
5. Tap the **Job** field. The **Find Job** screen displays. Take one of the following steps:

   64. Tap either the All or Favorites tab to filter the jobs, and tap a job from the list. Deltek Touch displays these tabs depending on your configuration.
   65. Enter the job number, name, or customer name on the **Search** field, and tap 🔍. Then tap a job from the search results, or tap **More…** to look up more jobs.

66. Tap any of your recently used jobs, or any job from your job list.
6. Select a currency in the **Currency** field.
7. Tap to take any of the following actions:
   67. Tap **New Line** to add an expense sheet line.
   68. Tap **Attach Receipt** to add a receipt to the expense sheet.
8. Tap .

Create an Expense Sheet Line

You can create an expense sheet line to add details to your expense reports.

To create an expense sheet line:

1. Tap , and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to modify.
3. Tap then tap **New Line**.
4. On the **Expense Sheet Line** screen, add the following information as needed:
   a) Select a date from the date picker. The **Date** field is required.
   b) Enter an expense sheet line description in the **Description** field.
   c) Tap the **Job** field. The **Job** search screen displays. Search or select a job.
   d) Tap the **Task** field. The **Task** search screen displays. Search or select a task.
   e) Tap the **Expense Amount Activity** field. The **Activity** search screen displays. Search or select an activity.
   f) Enter the appropriate values in the **Quantity**, **Unit Price**, **Tax**, and **Exchange Rate** fields when applicable. The **Amount** field is automatically populated when you save the expense sheet line.
   g) Select a currency from the currency picker. The **Currency** field is required.
   h) Tap the **Tax Code** field. The **Tax Code** screen displays. Search or select a code.
   i) Tap then tap **Attach Receipt** to add a receipt.
5. Tap .

Delete an Expense Sheet

Use these steps to delete an expense sheet.

To delete an expense sheet:

1. Tap , and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to delete.

   Alternatively, if you are using MScript Touch, you can swipe across the expense sheet in either direction (left-to-right or right-to-left), and tap **Delete**.
3. On the **Expense Sheet** screen, tap **Delete** then tap **Yes** to confirm.

Delete an Expense Sheet Line

Use these steps to delete an expense sheet line in your expense reports.

To delete an expense sheet line:

1. Tap ☰, and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to modify.
3. On the **Expense Sheet** screen, tap the expense sheet line you want to delete.
4. On the **Expense Sheet Line** screen, tap **Delete** then tap **Yes** to confirm.

Attach or Detach a Receipt

You can attach receipts either to an expense sheet, or expense sheet line. You also have the option to remove a receipt attached to an expense sheet line, but keep the receipt on your Archives folder.

> **Note:** You can attach receipts either from the **Expense Sheet** and **Expense Sheet Line** screens, or from **Quick Capture**. For more information on the latter, see the Quick Capture Procedures.

To attach a receipt to an expense sheet or expense sheet line:

1. Tap ☰, and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to modify.
3. On the **Expense Sheet** screen, take any of the following steps:

   69. To attach a receipt to an expense sheet:
       - Tap ⋮ then tap **Attach Receipt**.
       - Tap **Take Picture** to take a photo of the receipt, or tap **Pick from Gallery** to select a photo of the receipt from your device's gallery.
   70. To attach a receipt to an expense sheet line:
       a) Tap an expense sheet line.
       b) On the **Expense Sheet Line** screen, tap ⋮ then tap **Attach Receipt**.
       c) Tap **Take Picture** to take a photo of the receipt, or tap **Pick from Gallery** to select a photo of the receipt from your device's gallery.
   - To detach a receipt from an expense sheet line:
       a) Tap the expense sheet line with the receipt you want to remove.
       b) Tap ⋮ then tap **Detach Receipt**.
4. Tap 💾.

Delete a Receipt

You can delete attached receipts on your expense sheets, or expense sheet lines.

To delete an attached receipt:

1. Tap , and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to modify.
3. On the **Expense Sheet** screen, take any of the following steps:
   71. To delete a receipt from an expense sheet:
       a) Tap **Receipt**.
       b) Tap **Delete**.
   72. To delete a receipt from an expense sheet line:
       a) Tap an expense sheet line you want to modify.
       b) On the **Expense Sheet Line** screen, tap **Receipt**.
       c) Tap **Delete**.
4. Tap .

Edit an Expense Sheet

Use these steps to edit an expense sheet.

To edit an expense sheet:

1. Tap , and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to modify.
3. On the **Expense Sheet** screen, edit the fields as needed.
4. Tap to take one of the following steps:
   73. Tap **New Line** to create an expense sheet line. Add details as needed.
   74. Tap **Attach Receipt** to attach a receipt to your expense sheet.
5. Tap .

Copy an Expense Sheet

You can duplicate existing expense sheets as needed.

To copy an expense sheet:

1. Tap , and go to **Expense Sheet**.
2. Tap either the Open or All tab.
3. From the expense sheet list, press and hold an expense sheet then tap **Duplicate**. Alternatively, tap an expense sheet, and on the **Expense Sheet** screen, tap then tap **Duplicate**.

Submit an Expense Sheet

Use these steps to submit an expense sheet.

To submit an expense sheet:

1. Tap, and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to submit.
3. Tap then tap **Submit**.

> **Note:** When you have submitted the expense sheet, you have to reopen it to make modifications. To view rejected expense sheets, see the Rejections section.

Reopen an Expense Sheet

Submitted expense sheets are read-only. You can reopen an expense sheet to make modifications if you have rights to do so.

To reopen a submitted expense sheet:

1. Tap, and go to **Expense Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the expense sheet you want to reopen.
3. Tap then **Reopen**.

   The expense sheet status changes from **Submitted** to **In Progress**.

Quick Capture

This menu allows you to utilize your device's camera to capture photos of your expense receipts. In addition, you can use intelligent character recognition (ICR) to scan receipts for expense entry automation.

To access **Quick Capture**, tap ☰ and go to **Quick Capture**.

Quick Capture Concepts

You can:

75. Take a photo of a receipt or select an existing photo and attach it to an expense sheet.
76. Use ICR to automatically fill in the details in your expense sheets.

> **Note:** When you toggle the **Expense Sheet** switch on or off from the **Settings** screen, you can show or hide **Expense Sheet** and **Quick Capture** on the sliding menu.
>
> To enable the ICR functionality, toggle the **Use ICR for Expenses** switch on from the **Settings** screen. The functionality is available depending on your configuration settings.
>
> For more information on using Quick Capture with the ICR functionality, see the Quick Capture with ICR Procedures section.

Quick Capture Procedures

With **Quick Capture**, you can take a picture using your device's camera and attach it to your expense sheet.

Use Quick Capture

Use these steps to use **Quick Capture**.

To use Quick Capture:

1. Tap ☰, and go to **Quick Capture**.
2. Place the receipt on a well-lit, flat surface, and position your device accordingly.
3. Tap the camera button then tap **OK** to proceed, or **Retry** to discard the photo and capture a new one.
4. On the **Attach Receipt** screen, either accept the generated receipt name or enter a new one.
5. Tap an existing expense sheet to attach the receipt. Alternatively, tap **+ Create New** to create a new expense sheet.
6. Tap **Done**.

   A new expense sheet line is created with the image attached.

Quick Capture with ICR Procedures

This section includes information to help you navigate the **Quick Capture** screen when the intelligent character recognition (ICR) functionality is enabled.

Use Quick Capture with ICR

You can capture a receipt, and automatically fill in the details in your expense reports with the ICR functionality.

> **Note:** If your organization allows, you can turn Quick Capture with ICR on or off by toggling the **Use ICR for Expenses** switch on or off from the **Settings** screen.
>
> When ICR is enabled, the date of the transaction, description, amount, currency, and receipt may be derived from the photo. Other information, such as job and task, may also be derived automatically depending on your Maconomy configuration.

To use Quick Capture with ICR:

1. Tap ☰, and go to **Quick Capture**.
2. Place the receipt on a well-lit, flat surface, and preferably on a dark background. Position your device accordingly.
3. Tap the camera button then tap **Submit** to proceed, or the back arrow to retry. Alternatively, you can select a photo of the receipt from your camera gallery or browse your local and cloud files. Tapping **Submit** initiates the ICR process.

   You can also crop, delete, rotate, or combine the photos into a PDF prior to submitting by tapping the appropriate icons.

   > **Tip:** For receipts with more than 1 page, you can capture the pages consecutively, and merge these into a PDF using the icon. This functionality is available depending on your setup. The PDF can be more than 2 MB, and you can combine a minimum of 2 pages and a maximum of 4.

4. On the **Select Expense Sheet** screen, tap the check mark next to an existing expense sheet to attach the receipt. Alternatively, tap **+ Create New** to attach the receipt to a new expense sheet.
5. On the **Expense Sheet Line** screen, review and modify the expense details as needed.
6. Tap .

Mileage Sheet

This menu allows you to record and track your mileage expenses.

To access the **Mileage Sheet** screen, tap ☰ and go to **Mileage Sheet**.

Mileage Sheet Concepts

Use the **Mileage Sheet** screen to manage and report your mileage expenses. You can:

77. Create mileage sheets, and add details as needed.
78. Use a map to calculate distance for your mileage sheets.
79. Modify, copy, and delete mileage sheets.
80. Submit your mileage sheets for approval, and reopen submitted mileage sheets.

Mileage Sheet Procedures

This section includes information to help you navigate the **Mileage Sheets**, and **Mileage Sheet Line** screens.

Note: When you toggle the **Mileage Sheet** switch on or off from the **Settings** screen, you can show or hide **Mileage Sheet** on the sliding menu.

View the Mileage Sheet List

You can view your mileage sheets either in the Open or All tab on the **Mileage Sheets** screen. The mileage sheets are in descending order with the most recent report at the top of the list.

To view the mileage sheet list:

1. Tap ☰, and go to **Mileage Sheet**.
2. On the **Mileage Sheets** screen, take one of the following steps:
   81. Tap the Open tab to view mileage sheets which are in progress, and open for editing.
   82. Tap the All tab to view your editable mileage sheets, and reopen submitted mileage sheets.

   Tip: Pull down on the **Mileage Sheet** screen to manually refresh mileage sheet data at any time. A time stamp of your last update appears at the bottom of the screen.

View the Mileage Sheet Status

You can view the status of a mileage sheet on the mileage sheet list, and on the **Mileage Sheet** screen.

To view the mileage sheet status:

1. Tap ☰, and go to **Mileage Sheet**.
2. View the mileage sheet status on the right side of each mileage sheet on the list. Alternatively, tap a mileage sheet from the list, and view the status on the upper right corner on the **Mileage Sheet** screen. The following are the mileage sheet statuses:

83. **New** – The mileage sheet is being created, and is not yet saved. This status is color coded gray.
84. **In Progress** – The mileage sheet is created, and is open for editing. This status is color coded gray.
85. **Submitted** – The mileage sheet is submitted, but awaiting approval. This status is color coded green. Depending on your setup, you can reopen a submitted mileage sheet to make modifications.
86. **Approved** – The mileage sheet is approved. This status is color coded green.
87. **Rejected** – The mileage sheet is rejected. This status is color coded yellow. You can review, and modify your rejected expense sheets on the **Rejections** screen.

View a Mileage Sheet

When you tap a mileage sheet from the mileage sheet list, you can view additional details.

To view a mileage sheet, and the mileage sheet details:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab.
3. Scroll through the mileage sheet list, and tap a mileage sheet to view the details.

Create a Mileage Sheet

Use these steps to create a mileage sheet.

> **Note:** The following conditions are only applicable on REST Touch:
>
> - The **Expense Justification** field is visible if a task requires an explanation for the transaction.
> - The **Purchase Order Number** and **Purchase Order Line** fields is visible if you are a subcontractor.

To create a mileage sheet:

1. Tap , and go to **Mileage Sheet**.
2. Tap . The **Mileage Sheet** screen displays.
3. Enter an expense description in the **Description** field.
4. Select start and end dates in the **Period** field.
5. Tap the **Job** field. The **Find Job** screen displays. Take one of the following steps:
   88. Tap either the All or Favorites tab to filter the jobs, and tap a job from the list. Deltek Touch displays these tabs depending on your configuration.
   89. Enter the job number, name, or customer name on the **Search** field, and tap . Then tap a job from the search results, or tap **More…** to look up more jobs.
   90. Tap any of your recently used jobs, or any job from your job list.
6. Select a currency in the **Currency** field.
7. Tap then tap **New Line** to add a mileage sheet line.

8. Tap .

Create a Mileage Sheet Line

You can create a mileage sheet line to add details to your mileage sheets.

To create a mileage sheet line:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to modify.
3. Tap then tap **New Line**.
4. On the **Mileage Sheet Line** screen, add the following information as needed:
   a) Select a date from the date picker. The **Date** field is required.
   b) Enter a mileage sheet line description in the **Description** field.
   c) Tap the **Job** field. The **Job** search screen displays. Search or select a job.
   d) Tap the **Task** field. The **Task** search screen displays. Search or select a task.
   e) Tap the **Vehicle** field, and select a vehicle.
   f) Tap the **From**, and **To** fields to select, or search addresses. Tap then tap **Map** to display a map. For more information, see the Display a Map procedure.
   g) Enter the appropriate values in the **Distance**, and **Unit Price** fields. The **Amount** field is automatically populated when you save the mileage sheet line.

      The value in the **Distance** field can also be derived from the distance in Google Maps when you use the map feature.
   h) Select a currency from the currency picker. The **Currency** field is required.
5. Tap .

Display a Map

You can include addresses in your mileage sheets using either the address search screens, or the map feature.

To display a map:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to modify.
3. On the **Mileage Sheet** screen, tap a mileage sheet line.
4. Enter addresses on the **From**, and **To** fields.
5. Tap then tap **Map**. By default, the Google Maps application opens. The Google Maps web version opens if the application is not installed in your device, or is turned off.

Note: If you enter an inexact address in the **From** and/or **To** fields, the nearest locations display when the addresses are not located.

The value in the **Distance** field usually match the shortest distance displayed in the map. In some cases, however, there may be minor differences (for example, 10.4 km instead of 10 km). If the language in your device is set to **English (UK)**, the value in the **Distance** field on the **Mileage Sheet Line** screen is derived from Google Maps in miles.

Edit a Mileage Sheet

Use these steps to edit a mileage sheet.

To edit a mileage sheet:

1. Tap ☰, and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to modify.
3. On the **Mileage Sheet** screen, edit the fields as needed.
4. Tap ⋮ then tap **New Line** to create a mileage sheet line. Add details as needed.
5. Tap 💾.

Copy a Mileage Sheet

You can duplicate existing mileage sheets as needed.

To copy a mileage sheet:

1. Tap ☰, and go to **Mileage Sheet**.
2. Tap either the Open or All tab.
3. From the mileage sheet list, press and hold a mileage sheet then tap **Duplicate**. Alternatively, tap a mileage sheet, and on the **Mileage Sheet** screen, tap ⋮ then tap **Duplicate**.

Delete a Mileage Sheet

Use these steps to delete a mileage sheet.

To delete a mileage sheet:

1. Tap ☰, and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to delete.

   Alternatively, if you are using MScript Touch, you can swipe across the mileage sheet in either direction (left-to-right or right-to-left), and tap **Delete**.
3. On the **Mileage Sheet** screen, tap **Delete** then tap **Yes** to confirm.

Delete a Mileage Sheet Line

Use these steps to delete a mileage sheet line.

To delete a mileage sheet line:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to modify.
3. On the **MIleage Sheet** screen, tap the mileage sheet line you want to delete.
4. On the **Mileage Sheet Line** screen, tap **Delete** then tap **Yes** to confirm.

Submit a Mileage Sheet

Use these steps to submit a mileage sheet.

To submit a mileage sheet:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to submit.
3. Tap then tap **Submit**.

Note: When you have submitted the mileage sheet, you have to reopen it to make modifications. To view rejected mileage sheets, see the Rejections section.

Reopen a Mileage Sheet

Submitted mileage sheets are read-only. You can reopen a mileage sheet to make modifications if you have rights to do so.

To reopen a submitted mileage sheet:

1. Tap , and go to **Mileage Sheet**.
2. Tap either the Open or All tab, scroll through the list, and tap the mileage sheet you want to reopen.
3. Tap then **Reopen**.

   The mileage sheet status changes from **Submitted** to **In Progress**.

Purchase Order

This menu allows you to add, control, and keep track of your purchase orders.

To access the **Purchase Orders** screen, tap and go to **Purchase Order**.

Purchase Order Concepts

Use the **Purchase Orders** screen to manage your purchase orders. You can:

91. Create purchase orders, and add details as needed.
92. View, and modify your purchase orders.
93. Submit your purchase orders for approval, and reopen submitted purchase orders.

Purchase Order Procedures

This section includes information to help you navigate the **Purchase Orders**, and **Purchase Order Lines** screen.

> **Note:** When you toggle the **Purchase Order** switch on or off from the **Settings** screen, you can show or hide **Purchase Order** on the sliding menu.

View the Purchase Order List

You can view your purchase orders either in the Open or All tab on the **Purchase Orders** screen. The purchase orders are in descending order with the most recent report at the top of the list.

To view the purchase orders list:

1. Tap , and go to **Purchase Order**.
2. On the **Purchase Orders** screen, take one of the following steps:
   94. Tap the Open tab to view purchase orders which are in progress, and open for editing.
   95. Tap the All tab to view your editable purchase orders, and reopen submitted purchase orders.

   > **Tip:** Pull down on the **Purchase Order** screen to manually refresh purchase order data at any time. A time stamp of your last update appears at the bottom of the screen.

View a Purchase Order

When you tap a purchase order from the purchase order list, you can view additional details (for example, attached documents).

To view a purchase order, and the purchase order details:

1. Tap , and go to **Purchase Order**.
2. Tap either the Open or All tab.
3. Scroll through the purchase order list, and tap a purchase order to view the details.

Create a Purchase Order

Use these steps to create a purchase order.

To create a purchase order:

1. Tap , and go to a **Purchase Order**.
2. Tap . The **Purchase Order** screen displays.
3. Tap the **Vendor** field, and select or search a vendor. This field is required.
4. Tap the **Job** field. The **Job** search screen displays. Search or select a job.
5. Select a currency in the **Currency** field.
6. Tap the **Requisitioner** field. The **Requisitioner** search screen displays. Search or select a requisitioner.
7. Select a transaction type in the **Purchase Transaction Type** field.
8. Tap to take any of the following actions:
   96. Tap **New Line** to add a purchase order line.
   97. Tap **Attach Document** to add document to your purchase order.
9. Tap .

Create a Purchase Order Line

Use these steps to add a purchase order line to your purchase order.

To create a purchase order line:

1. Tap , and go to a **Purchase Order**.
2. Tap either the Open or All tab, scroll through the list, and tap the purchase order you want to modify.
3. Tap then tap **New Line**.
4. On the **Purchase Order Lines** screen, add the following information as needed:
   a) Enter a purchase order line description in the **Description** field.
   b) Select a purchase line type in the **Purchase Line Type** field. This field is required.
   c) Enter values in the **Quantity**, and **Unit Price** fields. The **Amount** field is automatically populated when you save the purchase order line.
   d) Select a currency in the **Currency** field.
5. Tap .

Delete a Purchase Order

Use these steps to delete a purchase order.

To delete a purchase order:

1. Tap , and go to **Purchase Order**.

2. Tap either the Open or All tab, scroll through the list, and tap the purchase order you want to delete.

   Alternatively, if you are using MScript Touch, you can swipe across the purchase order in either direction (left-to-right or right-to-left), and tap **Delete**.

3. On the **Purchase Order** screen, tap **Delete** then tap **Yes** to confirm.

Delete a Purchase Order Line

Use these steps to delete a purchase order line.

To delete a purchase order line:

1. Tap , and go to **Purchase Order**.
2. Tap either the Open or All tab, scroll through the list, and tap the purchase order you want to modify.
3. On the **Purchase Order** screen, tap the mileage sheet line you want to delete.
4. On the **Purchase Order Line** screen, tap **Delete** then tap **Yes** to confirm.

Submit a Purchase Order

Use these steps to submit a purchase order.

To submit a purchase order:

1. Tap , and go to **Purchase Order**.
2. Tap either the Open or All tab, scroll through the list, and tap the purchase order you want to submit.
3. Tap then tap **Submit**.

> **Note:** When you have submitted the purchase order, you have to reopen it to make modifications. To view rejected purchase order, see the Rejections section.

Reopen a Purchase Order

Submitted purchase orders are read-only. You can reopen a purchase order to make modifications if you have rights to do so.

To reopen a submitted purchase order:

1. Tap , and go to **Purchase Order**.
2. Tap either the Open or All tab, scroll through the list, and tap the purchase order you want to reopen.
3. Tap then **Reopen**.

   The purchase order status changes from **Submitted** to **In Progress**.

Absence Requests

This menu allows you to log, retrieve, and file all your absence requests for a given period.

To access the **Absence Requests** screen, tap ☰ and go to **Absence Requests**.

Absence Requests Concepts

Use the **Absence Requests** screen to register absences, and easily manage your absence requests. You can:

98. Create a new absence request, and view, modify, or delete existing requests.
99. Submit your absence requests for approval.

Absence Requests Procedures

This section includes information to help you navigate the **Absence Requests** screen.

> **Note:** When you toggle the **Absence Requests** switch on or off from the **Settings** screen, you can show or hide **Absence Requests** on the sliding menu.

View the Absence Request List

You can view your absence requests either in the Open or All tab on the **Absence Requests** screen. The absence requests are in descending order with the most recent request at the top of the list.

To view the absence request list:

1. Tap ☰, and go to **Absence Requests**.
2. On the **Absence Requests** screen, take one of the following steps:
   100. Tap the Open tab to view absence requests which are in progress, and open for editing.
   101. Tap the All tab to view your all absence requests.

   > **Tip:** Pull down on the **Absence Requests** screen to manually refresh absence request data at any time. A time stamp of your last update appears at the bottom of the screen.

View an Absence Request

When you tap an absence request from the absence request list, you can view additional details.

To view an absence request, and the absence request details:

1. Tap ☰, and go to **Absence Requests**.
2. Tap either the Open or All tab.
3. Scroll through the absence request list, and tap an absence request to view the details.

Create an Absence Request

Use these steps to create an absence request.

To create an absence request:

1. Tap ☰, and go to a **Absence Requests**.
2. Tap ✚. The **Absence Request** screen displays.
3. Tap the **Absence Type** field, and select or search an absence type. This field is required.
4. Select dates in the **First Day** and **Last Day** fields. These fields are required, and automatically populates the **Duration** field.
5. To indicate half days, toggle the **First Day is a Half Day** and/or **Last Day is a Half Day** switch on.
6. Enter information in the **Remark** field as needed.
7. Tap 💾.

Delete an Absence Request

Use these steps to delete an absence request.

To delete an absence request:

1. Tap ☰, and go to **Absence Requests**.
2. On the **Absence Requests** screen, tap either the Open or All tab, and tap the absence request you want to delete.
3. Tap **Delete**, and tap **Yes** on the confirmation window.

Submit an Absence Request

Use these steps to submit an absence request.

To submit an absence request:

1. Tap ☰, and go to **Absence Requests**.
2. Tap either the Open or All tab, scroll through the list, and tap the absence request you want to submit.
3. Tap ⋮ then tap **Submit**.

Note: To view rejected absence requests, see the Rejections section.

Allowance Requests

This menu allows you to log, retrieve, and file all your allowance requests for a given period.

To access the **Allowance Requests** screen, tap ☰ and go to **Allowance Requests**.

Allowance Requests Concepts

Use the **Absence Requests** screen to register allowances, and easily manage your allowance requests. You can:

102. Create a new allowance request, and view, modify, or delete existing requests.
103. Submit your allowance requests for approval.

Allowance Requests Procedures

This section includes information to help you navigate the **Allowance Requests** screen.

Note: When you toggle the **Allowance Requests** switch on or off from the **Settings** screen, you can show or hide **Allowance Requests** on the sliding menu.

View the Allowance Request List

You can view your allowance requests either in the Open or All tab on the **Allowance Requests** screen. The allowance requests are in descending order with the most recent request at the top of the list.

To view the allowance request list:

1. Tap ☰, and go to **Allowance Requests**.
2. On the **Allowance Requests** screen, take one of the following steps:

   104. Tap the Open tab to view allowance requests which are in progress, and open for editing.
   105. Tap the All tab to view your all allowance requests.

   Tip: Pull down on the **Allowance Requests** screen to manually refresh allowance request data at any time. A time stamp of your last update appears at the bottom of the screen.

View an Allowance Request

When you tap an allowance request from the allowance request list, you can view additional details.

To view an allowance request, and the allowance request details:

1. Tap ☰, and go to **Allowance Requests**.
2. Tap either the Open or All tab.
3. Scroll through the allowance request list, and tap an allowance request to view the details.

Create an Allowance Request

Use these steps to create an allowance request.

To create an allowance request:

1. Tap ☰, and go to **Allowance Requests**.
2. Tap ➕. The **Allowance Request** screen displays.
3. Tap the **Absence Type** field, and select or search an absence type. This field is required.
4. Select a date in the **Entry Date** field.
5. Enter absence time in the **Time Registered** field.
6. Modify the unit in the **Time Unit** field as needed.
7. Enter information in the **Reason** field as needed.
8. Tap 💾.

Delete an Allowance Request

Use these steps to delete an allowance request.

To delete an allowance request:

1. Tap ☰, and go to **Allowance Requests**.
2. On the **Allowance Requests** screen, tap either the Open or All tab, and tap the allowance request you want to delete.
3. Tap **Delete**, and tap **Yes** on the confirmation window.

Submit an Allowance Request

Use these steps to submit an allowance request.

To submit an allowance request:

1. Tap ☰, and go to **Allowance Requests**.
2. Tap either the Open or All tab, scroll through the list, and tap the allowance request you want to submit.
3. Tap ⋮ then tap **Submit**.

Note: To view rejected allowance requests, see the Rejections section.

Approvals

This menu allows you to approve or reject employee records, including timesheets, expenses, purchase orders, invoices, job quotes, and absence or allowance requests.

To access the **Approvals** screen, tap ☰ and go to **Approvals**.

Approvals Concepts

Use the **Approvals** screen to manage submitted employee records. You can:

106. Review items for approval, such as timesheets and vendor invoices
107. Approve or reject items, and undo the approval or rejection of an item
108. Message an employee about an item for approval
109. Approve items by batch in REST

Approvals Procedures

This section includes information to help you navigate the **Approvals** screen. Only project managers, supervisors, substitute approvers, and other employees belonging to the Maconomy approval hierarchies can view content on this screen.

> **Note:** When you toggle the **Approvals** switch on or off from the **Settings** screen, you can show or hide **Approvals** on the sliding menu.

Tasks for Project Managers

Approve or Reject a Timesheet Line

Use these steps to approve, or reject a timesheet line.

To approve or reject a timesheet line:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Timesheet Line** to display the timesheet lines awaiting approval.
3. Tap a timesheet line to review the details.
4. On the **Timesheet Line** screen, take any of the following steps:

    110. Tap a timesheet line to view the entry details.
    111. Tap **Timesheet** to open the timesheet.
    112. Tap ◂ or ▸ to move to the previous or next timesheet line.
    113. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

    When you tap **Reject**, you are required to enter a reason on the Rejection Comment window. When you tap **Message to Employee**, the default email service on your device opens, and is prefilled with the email address of the employee and a subject line.

Approve or Reject an Expense or Mileage Sheet Line

Expense sheets and mileage sheets for approval fall under **Expense Sheet Line** on the **Items for Approval** screen.

To approve or reject an expense or mileage sheet line:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Expense Sheet Line** to display the expense, and mileage sheet lines awaiting approval.
3. Tap a line to review the details. Either the **Expense Sheet Line** or the **Mileage Sheet Line** screen displays. Take any of the following steps:

    114. Tap a line to view the entry details.

    115. Tap **Expense Sheet** to open the expense sheet, or **Mileage Sheet** to open the mileage sheet. You can view the attachments on these screens.

    116. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

    When you tap **Reject**, you are required to enter a reason on the Rejection Comment window. When you tap **Message to Employee**, the default email service on your device opens, and is prefilled with the email address of the employee and a subject line.

Approve or Reject a Purchase Order Line

Use these steps to approve, or reject a purchase order line.

To approve or reject a purchase order line:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Purchase Order Lines** to display the purchase order lines awaiting approval.
3. Tap a purchase order line to review the details.
4. On the **Purchase Order Line** screen, take any of the following steps:

    117. Tap a purchase order line to view the entry details.

    118. Tap **Purchase Order** to open the purchase order.

    119. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

    When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject an Invoice Allocation Line

Use these steps to approve, or reject an invoice allocation line.

To approve or reject an invoice allocation line:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Invoice Allocation Line** to display the vendor invoices awaiting approval.
3. Tap an invoice allocation line to review the details.
4. On the **Invoice Allocation Line** screen, take any of the following steps:

120. Tap a vendor invoice to view the entry details.
121. Tap **Vendor Invoice** to open the vendor invoice.
122. Tap then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject a Draft Invoice

Use these steps to approve, or reject a draft invoice.

To approve or reject a draft invoice:

1. Tap , and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Draft Invoice** to display the draft invoices awaiting approval.
3. Tap a draft invoice to review the details.
4. On the **Draft Invoice** screen, take any of the following steps:

123. Tap a draft invoice to view the entry details.
124. Tap **Specification** to display the **Draft Invoice Lines** screen, which contains draft expense, and mileage invoice lines.
125. Tap or to move to the previous or next draft invoice lines.
126. Tap **PDF** to view a PDF version of the draft invoice.
127. Tap then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve Items by Batch

Toggle the **Batch Approvals** switch on from the Settings screen to approve items by batch. You cannot reject, or undo approval or rejection by batch.

Note: This functionality is only applies in REST Touch.

To approve items by batch:

1. Tap , and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Select Multiple**.
3. Tap the check mark next to an item to select items to approve.
4. Tap **Approve Selected**.

Tasks for Supervisors

Approve or Reject a Timesheet

Use these steps to approve, or reject a timesheet.

To approve or reject a timesheet:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Timesheets**.
3. Tap a timesheet to review the details.
4. On the **Timesheet Line** screen, take any of the following steps:

    128. Tap the Day, or Job tab to view the timesheet entries according to date, or job.
    129. Tap a timesheet line to view the entry details.
    130. Tap ◀ or ▶ to move to the previous or next timesheet.
    131. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

    When you tap **Reject**, you are required to enter a reason on the Rejection Comment window. When you tap **Message to Employee**, the default email service on your device opens, and is prefilled with the email address of the employee and a subject line.

Approve or Reject an Expense or a Mileage Sheet

Expense sheets and mileage sheets for approval fall under **Expense Sheet** on the **Items for Approval** screen.

To approve or reject an expense or mileage sheet line:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Expense Sheet** to display the expense, and mileage sheets awaiting approval.
3. Tap a line to review the details. Either the **Expense Sheet Line** or the **Mileage Sheet Line** screen displays. Take any of the following steps:

    132. Tap a line to view the entry details.
    133. Tap ◀ or ▶ to move to the previous or next expense, or mileage sheet.
    134. Tap **Receipt** to view attached receipts, if any.
    135. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

    When you tap **Reject**, you are required to enter a reason on the Rejection Comment window. When you tap **Message to Employee**, the default email service on your device opens, and is prefilled with the email address of the employee and a subject line.

Approve or Reject a Purchase Order

Use these steps to approve, or reject a purchase order.

To approve or reject a purchase order:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Purchase Order** to display the purchase orders awaiting approval.
3. Tap a purchase order to review the details.
4. On the **Purchase Order** screen, take any of the following steps:

    136. Tap a purchase order line to view the entry details.

137. Tap ◂ or ▸ to move to the previous or next purchase order.
138. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

   When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject a Vendor Invoice

Use these steps to approve, or reject a vendor invoice.

To approve or reject vendor invoice:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Vendor Invoice** to display the vendor invoices awaiting approval.
3. Tap a vendor invoice line to review the details.
4. On the **Vendor Invoice** screen, take any of the following steps:

139. Tap a vendor invoice to view the entry details.
140. Tap ◂ or ▸ to move to the previous or next vendor invoice.
141. Tap **Attachments** to view attached documents, if any.
142. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

   When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject a Job Quote

Use these steps to approve, or reject a job quote.

To approve or reject a draft invoice:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Job Quote** to display the job quotes awaiting approval.
3. Tap a job quote to review the details.
4. On the **Job Quote** screen, take any of the following steps:

143. Tap a job quote to view the entry details.
144. Tap ◂ or ▸ to move to the previous or next job quote.
145. Tap **PDF** to view a PDF version of the draft invoice.
146. Tap ⋮ then tap **Approve**, **Undo Approve/Reject**, or **Reject**.

   When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject an Absence Request

Use these steps to approve, or reject an absence request.

To approve or reject an absence request:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Absence Requests** to display the absence requests awaiting approval.

3. Tap an absence request to review the details.
4. On the **Absence Request** screen, take any of the following steps:

   147. Tap ◂ or ▸ to move to the previous or next absence request.
   148. Tap ⋮ then tap **Approve**, or **Reject**.

   When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve or Reject an Allowance Request

Use these steps to approve, or reject an allowance request.

To approve or reject an allowance request:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Allowance Requests** to display the allowance requests awaiting approval.
3. Tap an allowance request to review the details.
4. On the **Allowance Request** screen, take any of the following steps:

   149. Tap ◂ or ▸ to move to the previous or next allowance request.
   150. Tap ⋮ then tap **Approve**, or **Reject**.

   When you tap **Reject**, you are required to enter a reason on the Rejection Comment window.

Approve Items by Batch

Toggle the **Batch Approvals** switch on from the Settings screen to approve items by batch. You cannot reject, or undo approval or rejection by batch.

Note: This functionality is only applies in REST Touch.

To approve items by batch:

1. Tap ☰, and go to **Approvals**.
2. On the **Items for Approval** screen, tap **Select Multiple**.
3. Tap the check mark next to an item to select items to approve.
4. Tap **Approve Selected**.

Rejections

This menu allows you to access and review your rejected employee records, including timesheets, expenses, purchase orders, invoices, job quotes, and absence or allowance requests.

To access the **Rejections** screen, tap and go to **Rejections**. This menu and screen are only available in REST Touch.

Rejections Concepts

You can:

151. Manage, and review your rejected employee records.
152. Reopen your rejected records, and modify the details prior to resubmission.

Rejections Procedures

This section includes information to help you navigate the **Rejections** screen.

> **Note:** When you toggle the **Rejections** switch on or off from the **Settings** screen, you can show or hide **Rejections** on the sliding menu.

Review Rejections

Use these steps to review rejected employee records.

To review a rejected request:

1. Tap , and go to **Rejections**.
2. On the **Rejections** screen, tap a record you want to review. The appropriate screen displays.

> **Note:** You can view rejected timesheets when the **Submit Mode** setting is set to **Weekly**.

Edit Rejections

Use these steps to modify rejected employee records.

To modify a rejected record:

1. Tap , and go to **Rejections**.
2. On the **Rejections** screen, tap a record you want to review. The appropriate screen displays.
3. Edit the fields as needed.
4. Tap .

Reopen a Rejected Absence or Allowance

When you reopen a rejected absence, or allowance request, you can modify and resubmit the record for approval.

To reopen a rejected absence or allowance request:

1. Tap , and go to **Rejections**.
2. On the **Rejections** screen, tap a rejected absence or allowance record you want to review. The appropriate screen displays.
3. Tap then tap **Reopen**.

Resubmit Rejections

After modifying a rejected record, you can resubmit it for approval.

To resubmit a rejected record:

1. Tap , and go to **Rejections**.
2. On the **Rejections** screen, tap a record you want to review. The appropriate screen displays.
3. Edit the fields as needed.
4. Tap then tap **Submit**.

Settings

This menu allows you to access the **Settings** screen where you can modify the Deltek Touch settings according to your preferences.

To access the **Settings** screen, tap ☰ and go to **Settings**.

> **Note:** Some settings are defined by your system administrator, and may not be available or modifiable on your end.

Settings Screen

Configure the following settings for a customized Deltek Touch experience:

General	
Option	**Description**
Username	This field displays your username. To change the current user, tap **Forget me on this device**, and log on again.
Open In	This field displays the default screen when you open Deltek Touch. The available screens may vary according to your Touch application version. Select any screen you prefer. By default, the application opens on the **Timesheet** screen.
Usage Tracking	Toggle the switch on to allow usage tracking through Google Analytics. When usage tracking is enabled, Google Analytics receives information about your use of Deltek Touch (for example, the number of times you access the application). Confidential information (such as usernames, clients, or projects) are neither tracked nor publicly available. The anonymous data is only available to Deltek, and is utilized to determine the features you use for future application developments.
Log in using Fingerprint or **Log in using Face**	Toggle the switch on to enable logging in with fingerprint recognition or face authentication. This setting is off by default.
Use ICR for Expenses	Toggle the switch on to enable expense entry automation using intelligent character recognition (ICR) with **Quick Capture**. This setting is off by default.
Timesheet	
Option	**Description**
Submit Mode	This field displays the mode used in viewing and submitting timesheets. The **Daily** mode allows you to submit timesheets one day at a time, whereas the **Weekly** mode allows you submit timesheets for the entire week.

Week Start	This field is available when **Submit Mode** is set to **Daily**. Tap the field, and select the first day of the week on the **Calendar** and **Timesheet** screens. You can select either **Sunday** or **Monday**.
Registration Unit	This field is available when **Submit Mode** is set to **Weekly**. Tap the field, and select any of the following minute intervals: 153. 1 minute (0-59) 154. 2 minutes 155. 5 minutes 156. 10 minutes 157. 15 minutes 158. 30 minutes 159. Tenths (0, 6, 12, 18, etc.)
Use Week Numbers	For REST, this setting is available when the **Submit Mode** is set to **Weekly**. Toggle the switch on to display the week number on the **Weeks**, **Timesheet**, and **Summary** screens.
Keep on Timesheet as Default	By toggling the switch on, the **Keep on Timesheet** switch on the **Timesheet Line** screen is turned on by default when adding a new line.
Refresh When Opening	Toggle the switch on to enable automatic updates to the **Timesheet** screen upon opening. This is recommended if you frequently use timesheets, and prefer to obtain real-time data. This setting is off by default.
Menu	
Option	**Description**
Expense Sheet	Toggle the switch on to display **Expense Sheet** and **Quick Capture** on the sliding menu.
Mileage Sheet	Toggle the switch on to display **Mileage Sheet** on the sliding menu.
Purchase Order	Toggle the switch on to display **Purchase Order** on the sliding menu.
Absence Requests	Toggle the switch on to display **Absence Requests** on the sliding menu.
Allowance Requests	Toggle the switch on to display **Allowance Requests** on the sliding menu.

Rejections	Toggle the switch on to display **Rejections** on the sliding menu. This setting is only available in REST.
Approvals	Toggle the switch on to display **Approvals** on the sliding menu. This setting is off by default.
Approvals	
Option	**Description**
Substitute	Toggle the switch on to display all items for substitute approvals. This setting is off by default.
Include Substitute Approvals in Counters	Toggle the switch on to include the number of items for substitute approvals in the counter. This setting is off by default.
Batch Approvals	Toggle the switch on to enable the approval of items by batch. This setting is off by default.
Information	
Option	**Description**
Privacy Policy	Tap to access the **Deltek Privacy Policy** page, which contains legal notices and privacy information.
About	Tap to view the device and operating system information, which includes the following: ▪ Device Type ▪ Operating System ▪ User Agent ▪ Application version (Web App or Native App) ▪ Touch Sever version ▪ Web Service version ▪ Core System version ▪ Touch Server Build version ▪ Web App Build version Tap **Email Info** to send these information to a specified email address. This information may be requested by Deltek Support if you encountered and reported an issue with the application.
Option	**Description**
Forget me on this device	Tap to remove the server URL, and your user credentials from the application. On your next login, you are required to enter your organization’s Deltek Touch URL, username, and password.

Reset settings to default	Tap to clear all user settings from your device’s local storage. When you tap this option, you are required to log on again. After authentication, all user settings are reset to the default values.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com