Deltek Touch for Maconomy®

Touch 3.5 User Guide

Deltek

July 2020

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This edition published July 2020.

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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 *Apple App Store* and *Google Play* displays *Deltek Touch for Maconomy*.

Mobile Device Requirement

Deltek Touch for Maconomy supports mobile devices that run on the following operating systems:

- Apple iOS 12.0 and higher
- Android 8.0 and higher

Getting Started

Your Deltek Touch administrator sends you an email message containing a link that directs you to a page that displays only one link or two separate links, depending on your mobile operating system.

- For Android, it only contains one link that either automatically populates the **Server URL** field (if the application is already installed) or directs you to Google Play to download the application (if the application is not yet installed).

- For iOS, the page contains two separate links. Tapping the first link directs you to the mobile application in the App Store, allowing you to download it into your device. Tapping the second link automatically populates the **Server URL** field in the downloaded application.

Install Deltek Touch

1. On the *Google Play* or *Apple App Store*, search for the application (*Deltek Touch for Maconomy).*

2. Download and install the application by tapping the appropriate buttons.

3. Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking.

Log On to Deltek Touch

Initial and succeeding logins differ slightly. For initial login, you tap a link in the email that your administrator sends you to set up the Server URL. For succeeding logins, you only need to enter your security PIN or use biometric authentication (using fingerprint or face ID).

1. Tap *Deltek Touch.*

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

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

3. Tap the link to either download the application from the appropriate app store or automatically populate the **Server URL** field.

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

4. Tap **Connect**. If you are having any connection problem, tap **Cancel** to check and fix the link if necessary.

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

> **Note:** In newer Maconomy versions (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 access to access levels, actions, groups, and workspaces. Each role is assigned a login name, which you now use to log on to Deltek Touch.

6. Tap **Login**.

7. Enter a security PIN, and re-enter it to confirm.

Biometrics Authentication

You can also log on to Touch using biometrics authentication, which identifies you using your unique body measurements or characteristics, such as your fingerprint. This functionality is controlled by a server setting, which, if enabled, allows you to enable or disable the biometric login on the **Settings** screen in Touch.

> **Note:** The first time you launch Touch, you need to select between using PIN or biometrics. You can change the setting at any time on the **Settings** screen.

Security PIN

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

- **Minimum PIN Length** – Your System Administrator sets the minimum allowed numbers (ranging from 4 through 12) in the configuration file. By default, it is set to **6**.

- **PIN Complexity** – When this feature is turned on, Deltek Touch does not allow you to use a repeating PIN (for example, 111111) or sequential PIN (for example, 123456).

- **Unique PIN History** – This feature prevents you from using the same PIN over and over. It allows technical consultants to set the maximum number of PIN reuse (maximum is 6, which means that your current PIN cannot be the same as your last six PINs).

- **PIN Expiration** – This feature determines the validity of your current PIN before Deltek Touch requires you to change it. It accepts 0 (meaning no expiration) to 90 days. By default, it is set to 90. If you change your password, uninstall Deltek Touch, tap Forget Me on this Device, or change user, the expiration resets.

Log On to Deltek Touch Using the Two-Factor Authentication (2FA) Method

If the 2FA authentication is enabled for Touch, logging on for the first time requires you to active the 2FA authentication method. You have the option to use a 2FA authentication application, such as Duo Mobile, or scan a QR code.

> **Note:** Make sure you have the 2FA application required by your organization installed on your device.

1. Tap *Deltek Touch*.

2. On the login page, enter your user name and password, and tap **Log In**.

3. On the 2FA account setup page, take one of the following actions:

    ▪ If you want to use a 2FA authenticator application, tap **Activate Two Factor Authentication**.

    ▪ If you want to authenticate using another device, tap **Show QR Code**.

4. Depending on the option you select in step 3, take one of the following actions:

    ▪ In the 2FA authenticator application, verify that your account has been added automatically.

    ▪ On the QR Code page, scan the barcode image using your authenticator application to add your account.

5. Still in the 2FA authenticator application, generate a passcode and copy it.

6. On the 2FA account setup page, paste or enter the passcode, and tap **OK**.

7. Select the method you will use in signing on to Touch in the future. Tap either **Using your fingerprint** or **Use a PIN code**, and tap **Continue**.

8. Depending on the method you select in step 7, either add your fingerprint or set a PIN code.

Attention: For more information, see the Biometric Authentication and Security PIN sections in this document.

Enter a New 2FA PIN Code

If your 2FA PIN has expired (**Change Password**, **Change User**, **Forget me on this device**, or **Reset PIN**), you need to enter a new PIN code.

1. On the login page, enter your user name and password, and tap **Log In**.

2. Either user your 2FA authentication application to generate and copy a new PIN code or tap **Logging in from a new device? Click here** to receive a reset token via email.

3. Generate and copy a new PIN code either by tapping **Activate Two Factor Authentication** or **Show QR Code**.

4. Follow steps 4-8 of the previous procedure (*Log On to Deltek Touch Using the Two-Factor Authentication (2FA) Method*).

Log On to Touch Using the OneLogin or the Okta Authentication

If your Touch application has been configured to use either the OneLogin or the Okta setup, the **OneLogin** or **Okta** toggle switch may or may not display on the Touch **Login** screen depending on system settings.

Note: Make sure the **OneLogin** or **Okta** toggle switch is set to **ON**.

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1. Tap *Deltek Touch*.

2. On the login page, enter your user name, and tap **Log In**.

3. On the OneLogin or the Okta authentication screen, enter your password and tap **Continue**.

4. If the OneLogin or the Okta credentials are valid and Maconomy authentication succeeds, you can continue with the Touch authentication setup. Select the method you will use in signing on to Touch in the future. Tap either **Using your fingerprint** or **Use a PIN code**, and tap **Continue**.

The next time you access Touch, you only need to use your PIN/biometrics.

Log Out of Deltek Touch

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

- Press the **Home** button of your device.

- Tap ☰, and tap **Log Out**. If you choose to do this, Deltek Touch prompts you for your PIN or password on your next login regardless of the timeout period.

- Tap ☰, and tap **Settings**. Tap **Log Out**.

> **Note:** If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**. Favorites are saved combinations of project, task, and activity, which enable you to have easy access to them when doing time registration.

Change User

1. Tap **Log Out**.

2. On the PIN screen, tap **Change User**.

3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

4. On **Log In**, enter another user ID and password.

5. Tap **Log In**.

Reset PIN

1. Tap **Log Out**.

2. On a PIN screen, tap **Reset PIN**.

3. Enter a new four-digit PIN, and re-enter it to confirm.

Change Password

This task only applies to REST.

1. Tap **Log Out**.

2. On the PIN screen, tap **Change User**.

3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

4. On the Login screen, enter your user name and tap **Change Password**.

5. On **Change Password**, enter your old and new passwords, and tap **Done**.

6. On the PIN screen, enter a four-digit PIN code.

Reset Password

This task only applies to REST.

1. Tap **Log Out**.

2. On the PIN screen, tap **Change User**.

3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

4. On the Login screen, tap **Forgot Your Password**, and tap **Yes** to confirm.

5. Check your email for the token.

6. Enter the token in Deltek Touch, and tap **Done**.

7. On **Change Password**, enter your new passwords, and tap **Done**.

Relaunch Behavior

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

- If you close Deltek Touch and open it again from the **Home** screen or task bar (press and hold the **Home** button and tap the open application from the task bar), it displays the last screen that you accessed. In this case, you do not need to enter your password or PIN.

- If your session has timed out, Deltek Touch prompts you to enter your password or PIN the next time a server call is made (meaning, the next time the application "talks" to Maconomy).

For the browser version, the following scenarios occur:

- If you close the browser and open it again, the page displays the last screen that you accessed.

- If you move to another Web site or close the browser page completely, and enter the URL again, Deltek Touch prompts you to enter your login credentials.

Timesheet Submission

When you open Deltek Touch, the default screen depends on the **Submit Mode** setting. Deltek Touch supports two types of timesheet submissions, **Daily** and **Weekly**.

- The **Daily** submit mode only allows you to submit single days at a time from the **Timesheet** screen. In this mode, Deltek Touch displays the **Calendar** screen instead of the **Weeks** screen when you tap [icon]. In addition, Deltek Touch does not include non-working days from the **Overdue** status in this mode.

- The **Weekly** submit mode allows you to submit the current week either from the **Timesheet** or **Summary** screen. In this mode, Deltek Touch displays the **Weeks** screen instead of the **Calendar** screen when you tap [icon].

> **Note:** The submit setting is defined in the DeltekTouch.I file and only displays (read-only) in the **Submit Mode** field on the **Settings** screen. The behavior of the **Submit** button depends on the set mode.

Timesheet Status

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

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

Favorites

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

Map Feature

Touch can automatically display the calculated distance from Google Maps in the **Distance** field on the **Mileage Sheet Line** screen or **Quantity** field on the **Expense Sheet Line** screen.

- If you are using an iPhone device, the **Map** feature on the **Mileage Sheet Line** and **Expense Sheet Line** screens always open Google Maps in the browser (even if you have the Google Maps application installed). If you enter an imprecise or inexact address in the **From** and/or **To**

fields on **Mileage Sheet Line** or **Expense Sheet Line**, the **Map** feature may not be able to display available routes between them. To make the automatic calculation work, Deltek recommends that you enter a valid or exact address in the **From** and/or **To** fields. In this case, the value in the **Distance** or **Quantity** field matches the shortest distance displayed in the map.

- If you are using an Android device, the **Map** feature opens the Google Maps application by default. If you enter an inexact address in the **From** and/or **To** fields, the **Map** feature tries to find the nearest location in case it does not find the address you specify. The value in the **Distance** or **Quantity** 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).

> **Note:** Android devices usually come with the Google Maps application. You may choose to disable Google Maps so that the **Map** feature and **Distance** or **Quantity** field behave more similar as on iPhone devices.

Screen Display

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

Timesheet

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

Timesheet

This screen lists all timesheet lines for a given period. If you want to change the period, tap 📅. Tapping the icon, however, displays either the **Weeks** or **Calendar** screen, depending on your **Submit Mode** setting.

Weeks

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

Calendar

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

Summary

This menu allows you to access the **Summary** screen, which displays the summarized time registrations per day or project for a selected timesheet period.

Expense Sheet

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

Expense Sheets

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

Expense Sheet

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

Expense Sheet Line

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

Quick Capture

This screen allows you to either take a picture using your device's camera or select a picture from the archive or camera gallery and easily attach this to an expense sheet line.

Mileage Sheet

This screen allows you to report your mileage.

Mileage Sheets

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

Mileage Sheet

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

Mileage Sheet Line

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

Purchase Order

This menu allows you to access all **Purchase Orders** screens.

Purchase Orders

This screen allows you to create and submit purchase orders.

Absence Requests

This menu allows you to access all **Absence Requests** screens.

Absence Requests

This screen allows you to create and follow up requests for absence.

Allowance Requests

This menu allows you to access all **Allowance Request** screens.

Allowance Requests

This screen allows you to create and follow up requests for allowance.

Approvals

This menu allows you to access all **Approval** screens.

Item for Approvals

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

Rejections

This menu allows you to access all **Rejections** screens.

Rejections

This menu is only available in REST. This menu allows you to review and edit rejected expense sheets and mileage sheets. It only displays when the **Rejections** toggle switch is set to **ON** on **Settings**.

Settings

This menu allows you to access the **Settings** screen, which helps you configure the Deltek Touch settings according to your preferences.

Help

This menu allows you to view the user guide for this application. You can also access **Help** from **Settings**.

Log Out

This menu allows you to log out of Deltek Touch.

Timesheet

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

View the Timesheet List

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

> **Note:** When you are in the **Daily** mode, however, Deltek Touch displays the **Calendar** screen instead of the **Weeks** screen.

View a Timesheet

The header of the **Timesheet** screen displays the current status and total hours of a timesheet period. Depending on the setup of your employee you may also see balances for Regular time, Overtime and your fixed time.

1. Tap ▤, and tap **Timesheet**. Take one of the following actions:

   ▪ Tap ▦ to display **Weeks**, and tap a timesheet period. *This screen displays if **Submit Mode** is set to **Weekly***.

   ▪ On **Calendar**, tap a date. *This screen displays if **Submit Mode** is set to **Daily***.

   ▪ Tap **Today** (on **Calendar** or **Timesheet**) to display the timesheet containing the current date. Today's date is highlighted.

   ▪ If the **Check-In** field for you on the Employees tab in Maconomy is enabled, you can tap the **Registration** tab (which displays the timesheet lines and time registered on these lines on the given day) or **Check in** (which displays the check in periods on the given day) tab.

2. On **Timesheet**, you can perform any of the following tasks:

   ▪ Switch between different days of a timesheet period by tapping a date in the calendar carousel to switch to that date (for example, if you are on Mon 1, tapping Thu 4 moves the calendar to Thu 4).

   ▪ Tap ◀ or ▶ in the calendar carousel to go back to the previous period or move to the next (for example, if you are on Mon 13 – Sun 19, tapping the next button moves the period to Mon 20 – Sun 26).

   The selected day is highlighted.

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

Search for a Project

Deltek Touch allows you to search for a project by tapping next to a search field. On the **Find Project** screen, Deltek Touch returns all projects to which you have access, but it only displays 30 projects at a time. To see the next 30 projects, tap **More**.

> **Note:** Depending on the configuration setting, the **Find Job** screen may display either both the **All** and **Favorite** tabs or only the **Favorite** tab.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap .

3. On **Find Projects**, filter projects by tapping **All** or **Favorites**, or by entering a name, number, or client in the search field. Deltek Touch first searches through your recently used projects. Only those projects to which you have been assigned on the Employee Control feature in Maconomy core are available.

   - If the project you are searching for is in the list, tap it.

   - If the project is not in the list, tap **Continue Search on Server** to search all of Maconomy.

   - If this project has tasks, you need to select the task.

Editing a Timesheet

Deltek Touch allows you to enter timesheet data, add or delete a timesheet line, copy a timesheet list, delete a timesheet line, create or delete a favorite, select an activity or a task, and reopen a timesheet.

On **Timesheet**, you can go to the previous or next period by tapping or at either end of the calendar carousel. For example, if you are on Mon 13 – Sun 19, tapping moves the period to Mon 20 – Sun 26. If a timesheet line is marked as **Absence Management**, it displays as read-only. You cannot delete or copy it.

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

Enter Time on Timesheet (Quick Entry)

Quick entry is efficient if you enter time on the same timesheet line each day (under the assumption that you have already created that timesheet line with the **Keep on Timesheet** set to **ON**.)

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping or in the calendar carousel.

3. Tap the hour field of a selected line. If **Check-In** is enabled, tap either **Registration** (for your registered time for a line) or **Check In** (for several check-ins within a day).

4. Scroll through the time picker, and tap a value.

5. Tap **Done**.

Enter Time on Timesheet Line (Detailed Entry)

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap anywhere in a timesheet line except the hour field.

4. On **Timesheet Line**, tap the field that you want to update, and enter or tap the appropriate values.

5. Tap **Done**.

Add a Timesheet Line

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap ➕.

4. On **Find Project**, search for and tap your project. You can tap **All** or **Favorites**, or enter a name, number, or client in the search field to filter search results.

5. Depending on your configuration, most details of the line display by default for you. Make any changes to this line as appropriate, including adding hours.

6. Tap **Done**.

> **Note:** For both REST and MScript, Dettek Touch displays either the **Favorites** tab only or both the **All** and **Favorites** tabs, depending on your configuration. For REST only, the **Purchase Order Number** and **Purchase Order Line** fields only display if you are a subcontractor.

Add a Check-In Entry to a Timesheet Line

This task only applies if the **Check-In** field for you on the Employees tab in Maconomy is enabled.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. On **Timesheet**, tap **Check In**.

4. Scroll through the time picker, and tap a value. You can also tap ▸ to add more details on the **Check In** screen.

5. Tap **Done**.

Delete a Check-In Entry from a Timesheet Line

This task only applies if the **Check-In** field for you on the Employees tab in Maconomy is enabled.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. On **Timesheet**, tap **Check In**.

4. Scroll through the list, and swipe across the selected line in either direction (left-to-right or right-to-left), and tap **Delete**.

Copy a Timesheet Line

This task only applies to MScript.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Scroll through the list, and take one of the following actions:

   ▪ Touch and hold the line until **Copy Line** displays, and tap it.

   ▪ Tap the timesheet line to display the **Timesheet Line** screen, and tap **Copy Timesheet Line**.

Delete a Timesheet Line

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Scroll through the list, and take one of the following actions:

   ▪ Swipe across the selected line in either direction (left-to-right or right-to-left), and tap **Delete**.

   ▪ Tap the line to display the **Timesheet Line** screen, and tap **Remove from Timesheet**.

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

Select a Task for a Line

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

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap a project.

4. Tap the **Task** field.

5. Scroll through the list or enter a keyword in the search field.

6. Tap a task.

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

Select an Activity for a Line

The **Activity** field only becomes read-only when you are creating a new timesheet line and a selected task derives an activity with the **Overwrite Activity** marked.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period b ytapping ◀ or ▶ in the calendar carousel.

3. Tap a project.

4. Tap the **Activity** field.

5. Scroll through the list or enter a keyword in the search field.

6. Tap an activity.

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

Create a Favorite

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

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap ✚ .

4. Make sure **Find Project** displays **All**.

5. Scroll through the list or enter a name, number, or client in the search field. If the project is not included in the list, tap **Continue Search on Server** to search all of Maconomy.

6. Tap a project. You can also select a task/activity combination, which Deltek Touch saves as part of **Favorites**.

7. In **Create Favorite**, toggle the switch to **ON**.

8. Tap **Done**.

9. On the **Create Favorite** popup window, you can accept or change the default favorite name, and tap **OK**.

Delete a Favorite

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap ✚ .

4. Tap **Favorites**.

5. Scroll through the list or enter name, number, or client in the search field.

6. Tap a project.

7. Tap **Delete Favorite**, and tap **Yes** to confirm.

Add a Daily Description

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Scroll through the list, and tap a timesheet line.

4. Tap the **Daily Description** field.

5. Enter your comments, and tap **Done** to save.

Delete a Daily Description

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Scroll through the list, and tap a timesheet line.

4. Tap the **Daily Description** field.

5. In the **Comments** field, tap ⊗ .

6. Tap **Done**.

Reopen a Timesheet

You can only reopen timesheets to which you have access rights. If you are in the **Weekly** submit mode, you can also reopen the timesheet on the **Summary** screen.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from another period by tapping ◀ or ▶ in the calendar carousel.

3. Tap **Reopen**, and tap **Reopen** to confirm. The **Submitted** status returns to its previous status before you submitted it (for example, **In Progress**).

4.   Update the timesheet, and tap **Submit**.

Submit a Timesheet

Before you submit a timesheet, make sure that each timesheet line has a project number, task, activity, daily description, and minimum required hours. If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1.   Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2.   On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from

another period by tapping ◀ or ▶ in the calendar carousel, or tapping 🗓

3.   Make sure that you have entered your time for this period either on **Timesheet** or **Summary** screen. For **Daily** submit mode, you can only submit single days at a time from the **Timesheet** screen.

4.   Tap **Submit**, and tap **Submit** to confirm.

> **Note:** If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Review a Rejected Timesheet or Timesheet Line

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

1.   Tap ☰, and tap **Rejections**.

2.   On **Rejections**, tap the timesheet or timesheet line you need to review.

3.   Update the timesheet or timesheet line, and tap 💾.

4.   When ask to continue, tap **Yes**.

Summary

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

View Period Summary

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from

   another period by tapping ◄ or ▶ in the calendar carousel.

3. Tap ▤, and tap **Summary**.

4. Tap **Day** or **Job** to view the summarized information by day or job. Tapping a day in **Day** view opens the corresponding day for the current timesheet period on **Timesheet**.

Submit a Timesheet

If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1. Tap a period on **Weeks** or a date on **Calendar**, depending on your **Submit Mode** setting.

2. On **Timesheet**, tap your desired date in the calendar carousel. You can also select a date from

   another period by tapping ◄ or ▶ in the calendar carousel, or tapping 📅.

3. Tap ▤, and tap **Summary**.

4. Make user you have entered your time for this period. For **Daily** submit mode, you can only submit single days at a time from the **Timesheet** screen.

5. Tap **Submit**, and tap **Submit** to confirm.

> **Note:** If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Expense

View the Expense Sheet List

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap either **Open** or **All**, and scroll through the list to view expense sheets, which are sorted descending with most recent at the top. The number of reports displayed depends on your settings. You can scroll down to get view next page. Tap an expense sheet to view details.

   ▪ The **Open** expense sheets have the **In Progress** status and are open for editing.

   ▪ The **All** expense sheets belong to you and allow you to edit or reopen submitted expense sheets, or reopen rejected expense sheets.

View Expense Sheet Details

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap **Open** or **All**.

3. Tap the expense sheet you want to view.

Add an Expense Sheet

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap ➕.

3. On **Expense Sheet**, enter or select necessary details, and tap 💾.

> **Note:** You can add a project to the **Expense Sheet** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter jobs by entering a job name, job number, or customer in the search field. You can also select one of the recently used jobs or a job from all jobs.

Copy an Expense Sheet

1. Tap ☰, and tap **Expense Sheet**

2. On **Expense Sheets**, take one of the following actions:

   ▪ Tap and hold an expense sheet, and tap **Duplicate**.

   ▪ Tap an expense sheet and on **Expense Sheet**, tap ⁝, and tap **Duplicate**.

Add an Expense Sheet Line

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap the expense sheet you want to update.

3. On **Expense Sheet**, tap ⁝, and tap **New Line**.

4. On **Expense Sheet Line**, enter or select necessary details, and tap [icon]. Alternatively, you can add the expense sheet line by tapping [icon] and tapping **New Line**.

You need to add a project on **Expense Sheet Line** by tapping **Project**. On **Find Job**, tap **All** or **Favor** to filter projects. You can also select one of the recently used jobs or a job from all jobs. If the selected project has a task or an activity, you must also select the task or activity by tapping the corresponding field.

Deltek Touch displays either the **Favorites** tab only or both the **All** and **Favorites** tabs, depending on your configuration.

> **Note:** These only apply to REST:
> - Expense justification fields only display if a task requires a justification.
> - The **Purchase Order Number** and **Purchase Order Line** fields only display if you are a subcontractor.

Delete an Expense Sheet

1. Tap [icon], and tap **Expense Sheet**.
2. On **Expense Sheets**, scroll through the list to find the expense sheet you want to delete.
3. Take one of the following actions:
   - *This only applies to MScript.* On the same screen, swipe across the expense sheet in either direction (left-to-right or right-to-left), and tap **Delete**.
   - On **Expense Sheet**, tap the expense sheet, and tap **Delete**.

Delete an Expense Sheet Line

1. Tap [icon], and tap **Expense Sheet**.
2. On **Expense Sheets**, tap the expense sheet line you want to delete.
3. On **Expense Sheet Line**, tap **Delete**.

Submit an Expense Sheet

If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1. Tap [icon], and tap **Expense Sheet**.
2. On **Expense Sheets**, tap the expense sheet you want to submit.
3. On **Expense Sheet**, tap [icon], and tap **Submit**.

> **Note:** If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Review a Rejected Expense Sheet

1. Tap ☰, and tap **Rejections**.

2. On **Rejections**, tap the expense sheet you need to review.

3. Update the expense sheet, and tap 💾.

4. When ask to continue, tap **Yes**.

Reopen an Expense Sheet

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

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap the expense sheet you want to submit.

3. On **Expense Sheet**, tap ⋮, and tap **Reopen**. The **Submitted** status becomes **In Progress**.

Attach a Receipt

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

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

Using Quick Capture

This feature only applies to Maconomy 2.0 SP 5 and higher.

1. Tap ☰, and tap **Quick Capture**.

2. Tap your device's default camera button, and tap **OK**. Tap **Retry** if you want to discard the previous photo and capture a new one.

3. On **Attach Receipt**, either accept the generated receipt name or enter a new one, and tap the expense sheet to which you want it to attach. You can also create a new expense sheet by tapping ➕ **Create New**. The newly created expense sheet name displays and is automatically selected in the list.

4. Tap **Done**.

5. On **Expense Sheet**, enter or tap necessary details, and tap 💾.

Using Attach Receipt

1. Tap ☰, and tap **Expense Sheet**.

2. On **Expense Sheets**, tap the expense sheet you want to update.

3. On **Expense Sheet**, take one of the following actions:

   ▪ On the header, tap ⋮, and tap **Attach Receipt**. If you take this step, skip step 5.

- Under **Expense Sheet Lines**, tap the expense sheet line to which you want to attach a receipt. If there is no expense sheet line, tap then tap **New Line**.

4. On **Expense Sheet Line**, tap , and tap **Attach Receipt**.

5. On **Attach Receipt**, tap **Take Picture**, **Pick from Gallery**, or **Pick from Archive**.

6. Take one of the following actions:
   - If you tap **Take Picture**, tap your device's default camera button, and tap **OK.**
   - If you tap **Pick from Gallery**, tap the photo that you need, and tap **Use Photo**.
   - If you tap **Pick from Archive**, tap the photo that you need.

7. On **Receipt**, enter a receipt name, and tap **Done**. If you tapped **Pick from Archive**, you cannot edit the existing receipt name.

8. On **Expense Sheet Line**, enter or tap necessary details.

9. Tap .

Delete a Receipt

1. Tap , and tap **Expense Sheet**.

2. On **Expense Sheets**, tap the expense sheet that you want to update.

3. On **Expense Sheet**, tap the expense sheet line with the attached receipt you want to delete.

4. On **Expense Sheet Line**, tap **Receipt**.

5. Tap **Delete**.

Mileage

View the Mileage Sheet List

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap either **Open** or **All** and scroll through the corresponding list of mileage sheets, which are sorted descending with most recent at the top.

    ▪ The **Open** mileage sheets have the **In Progress** status and are open for editing.

    ▪ The **All** mileage sheets belong to you and allow you to edit or reopen submitted mileage sheets, or reopen rejected mileage sheets.

View Mileage Sheet Details

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap **Open** or **All**, and scroll through the list to view expense sheets.

3. Tap the expense sheet you want to view.

Add a Mileage Sheet

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap ➕.

3. On **Mileage Sheet**, enter or select necessary details, and tap 💾.

> **Note:** You can add a project to the **Mileage Sheet** screen by tapping the **Project** field, which displays the **Find Job** screen. It allows you to filter jobs by entering a job name, job number, or customer in the search field. You can also select one of the recently used jobs or a job from all jobs.

Copy a Mileage Sheet

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, take one of the following actions:

    ▪ Tap and hold a mileage sheet, and tap **Duplicate**.

    ▪ Tap a mileage sheet and on **Mileage Sheet**, tap ⋮, and tap **Duplicate**.

Add a Mileage Sheet Line

If the language in your device is set to **English (United Kingdom)** for Android or **English (UK)** for iOS, the **Distance** value on **Mileage Sheet Line** is derived from Google Maps in miles.

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap the mileage sheet you want to update.

3. On **Mileage Sheet**, tap [icon], and tap **New Line**.

4. On **Mileage Sheet Line**, enter or select necessary details, and tap [icon]. Alternatively, you can add a mileage sheet line by tapping [icon] and tapping **New Line**.

    You need to add a project on **Mileage Sheet Line** by tapping **Project**. On **Find Job**, tap **All** or **Favorites** to filter projects. You can also select one of the recently used jobs or a job from all jobs. If the selected project has a task or an activity, you must also select the task or activity by tapping the corresponding field

Note: Deltek Touch displays either the **Favorites** tab only or both the **All** and **Favorites** tabs, depending on your configuration.

Delete a Mileage Sheet

1. Tap [icon], and tap **Mileage Sheet**.

2. Scroll through the list to find the expense sheet that you want to delete and take one of the following actions:

    ▪ *This only applies to MScript.* Swipe across the mileage sheet in either direction (left-to-right or right-to-left), and tap **Delete**.

    ▪ Tap the mileage sheet, and tap **Delete** on **Mileage Sheet**.

Delete a Mileage Sheet Line

1. Tap [icon], and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap the mileage sheet you want to update.

3. Take one of the following actions:

    ▪ *This only applies to MScript and only if the mileage sheet is not approved or not transferred.* Swipe across the mileage sheet in either direction (left-to-right or right-to-left), and tap **Delete**.

    ▪ Tap the mileage sheet line you want to delete. On **Mileage Sheet Line**, tap **Delete**.

Submit a Mileage Sheet

If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1. Tap [icon], and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap the mileage sheet you want to submit.

3. On **Mileage Sheet**, tap [icon], and tap **Submit**.

Note: If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Review a Rejected Mileage Sheet

1. Tap ☰, and tap **Rejections**.

2. On **Rejections**, tap the mileage sheet you need to review.

3. Update the mileage sheet, and tap 💾.

4. When ask to continue, tap **Yes**.

Reopen a Mileage Sheet

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

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, tap the mileage sheet you want to submit.

3. On **Mileage Sheet**, tap ⋮, and tap **Reopen**. The **Submitted** status becomes **In Progress**.

Display a Map

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

> **Note:** There is a slight difference in map behavior between iPhone and Android devices. For more information, see the Map Feature section in this document.

1. Tap ☰, and tap **Mileage Sheet**.

2. On **Mileage Sheets**, scroll through the list to select a mileage sheet.

3. On **Mileage Sheet**, tap a mileage sheet line.

4. On **Mileage Sheet Line**, make sure **From** and **To** have values.

5. Tap ⋮, and tap **Map**. The corresponding Google map displays on a browser.

Purchase

View the Purchase Order List

1. Tap ☰, and tap **Purchase Order**.

2. On **Purchase Orders**, tap either **Open** or **All**, and scroll through the list to view purchase orders, which are sorted descending with most recent at the top. The number of purchase orders displayed depends on your settings. You can scroll down to get view next page. Tap a purchase order to view details.

   ▪ The **Open** purchase orders have the **In Progress** status and are open for editing.

   ▪ The **All** purchase orders belong to you and allow you to edit or reopen submitted purchase orders, or reopen rejected purchase orders.

View Purchase Order Details

1. Tap ☰, and tap **Purchase Order**.

2. On **Purchase Orders**, tap **Open** or **All**, and scroll through the list to view purchase orders.

3. Tap the purchase order you want to view.

Add a Purchase Order

1. Tap ☰, and tap **Purchase Order**.

2. On **Purchase Orders**, tap ➕.

3. On **Purchase Order**, enter or select necessary details, and tap 💾.

Add a Purchase Order Line

1. Tap ☰, and tap **Purchase Order**.

2. On **Purchase Orders**, tap the purchase order you want to update.

3. On **Purchase Order**, tap ⋮, and tap **New Line**.

4. On **Purchase Order Line**, enter or select necessary details, and tap 💾. Alternatively, you can add the purchase order line by tapping ⋮, and tapping **New Line**.

Delete a Purchase Order Line

1. Tap ☰, and tap **Expense Sheet**.

2. On **Purchase Orders**, tap the purchase order you want to update.

3. Tap the purchase order line you want to delete.

4. On **Purchase Order Line**, tap **Delete**.

Submit a Purchase Order

If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1. Tap [icon], and tap **Purchase Order**.

2. On **Purchase Orders**, tap the purchase order you want to submit.

3. On **Purchase Order**, tap [icon], and tap **Submit**.

> **Note:** If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Review a Rejected Purchase Order

1. Tap [icon], and tap **Rejections**.

2. On **Rejections**, tap the purchase order you need to review.

3. Update the purchase order, and tap [icon].

4. When ask to continue, tap **Yes**.

Absence Request or Allowance Request

The **Absence Request** and **Allowance Request** screens allows you to register absence or allowance request in days or hours, depending on the required time unit on a given date.

View the Absence or Allowance Request List

1. Tap ☰, and tap **Absence Requests** or **Allowance Requests**.

2. On **Absence Request** or **Allowance Request**, tap either **Open** or **All**, and scroll through the list to view absence or allowance requests, which are sorted descending with most recent at the top. The number of requests displayed depends on your settings. You can scroll down to get view next page. Tap a request to view details.

   ▪ The **Open** requests have the **In Progress** status and are open for editing.

   ▪ The **All** requests belong to you and allow you to edit or reopen submitted absence or allowance requests, or reopen rejected requests.

View Absence or Allowance Request Details

1. Tap ☰, and tap **Absence Requests** or **Allowance Requests**.

2. On **Absence Requests** or **Allowance Requests**, tap **Open** or **All**, and scroll through the list to view requests.

3. Tap the request you want to view.

Add an Absence or Allowance Request

1. Tap ☰, and tap **Absence Requests** or **Allowance Requests**.

2. On **Absence Requests** or **Allowance Requests**, tap ➕.

3. On **Absence Request** or **Allowance Request**, enter or select necessary details, and tap 💾.

Delete an Absence or Allowance Request

1. Tap ☰, and tap **Absence Requests** or **Allowance Requests**.

2. On **Absence Requests** or **Allowance Requests**, tap the request you want to delete.

3. On **Absence Request** or **Allowance Request**, tap **Delete**.

Submit an Absence or Allowance Request

If you have rights to reopen the timesheet, the **Submitted** status becomes **Reopen** after submission. Otherwise, submitted timesheets are read-only.

1. Tap ☰, and tap **Absence Requests** or **Allowance Requests**.

2. On **Absence Requests** or **Allowance Requests**, tap the request you want to submit.

3. On **Absence Request** or **Allowance Request**, tap ⚙, and tap **Submit**.

> **Note:** If there is any error, a notification screen displays. You need to tap the back button to return to the timesheet, and correct it before submitting.

Review a Rejected Absence or Allowance Request

1. Tap , and tap **Rejections**.

2. On **Rejections**, tap the absence request or allowance request you need to review.

3. Update the request, and tap .

4. When ask to continue, tap **Yes**.

Approvals

This section describes tasks that are only applicable to Project Managers and Supervisors.

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

As the project manager or supervisor, you can display or hide the corresponding screens of various approval types by toggling **Approvals** to **ON** on **Settings**. The available screens, however, depend on the available items to approve. If there are pending approvals, a corresponding badge displays on ▤ and on the same line as the **Items for Approval** item.

In addition, Touch has the ability to notify you (as the assigned substitute approver) if there are items you need to approve in the absence of the original approver. You can also approve items by batch in REST, which you can enable from the **Settings** screen.

Tasks for Project Manager

Approve or Reject a Timesheet Line

1. Tap ▤, and tap **Approvals**.

2. On **Items for Approval**, tap **Timesheet Line**.

3. On **Timesheet Line**, tap a submitted timesheet to review, or swipe to approve or reject.

4. On the **Timesheet Line** screen, take any of the following actions:

   ▪ Tap a timesheet line to view entry details.

   ▪ Tap a timesheet line, tap ⋮, and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

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

   ▪ Tap the Timesheet link to open the timesheet.

   ▪ Tap ◀ or ▶ on the header to switch between timesheet lines. The following actions apply to all screens with the **Message to Employee** and **Reject** buttons.

Approve or Reject an Expense Sheet Line

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

1. Tap ▤, and tap **Approvals**.

2. On **Items for Approval**, tap **Expense Sheet Line**.

3. On **Expense Sheet Line**, tap a submitted expense sheet to review, or swipe to approve or reject.

4. On the **Expense Sheet Line** screen, take any of the following actions:

- Tap an expense sheet line to view entry details.

- Tap [icon], and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

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

- Tap the Expense Sheet link to open the expense sheet.

5. On the **Expense Sheet** screen, tap **Attachments** to view available receipts.

Approve or Reject a Purchase Order Line

1. Tap [icon], and tap **Approvals**.

2. On **Items for Approval**, tap **Purchase Order Lines**.

3. On **Purchase Order Line**, tap a submitted purchase order to review, or swipe to approve or reject.

4. On the **Purchase Order Line** screen, take any of the following actions:

   - Tap a purchase order line to view entry details.

   - Tap [icon], and tap **Approve**, **Undo Approve/Reject**, or **Reject**.

     Tapping **Reject** requires you to state a reason for the rejection.

   - Tap the Purchase Order link to open the purchase order.

Approve or Reject an Invoice Allocation Line

1. Tap [icon], and tap **Approvals**.

2. On **Items for Approval**, tap **Invoice Allocation Line**.

3. On **Invoice Allocation Line**, tap a submitted vendor invoice to review, or swipe to approve or reject.

4. On the **Invoice Allocation Line** screen, take any of the following actions:

   - Tap a vendor invoice to view entry details.

   - Tap [icon], and tap **Approve**, **Undo Approve/Reject**, or **Reject**.

     Tapping **Reject** requires you to state a reason for the rejection.

   - Tap the Vendor Invoice link to open the vendor invoice.

5. On the **Vendor Invoice** screen, tap **Attachments** to view attached documents.

Approve or Reject a Draft Invoice

1. Tap [icon], and tap **Approvals**.

2. On **Items for Approval**, tap **Draft Invoice**.

3. On **Draft Invoice**, tap a submitted draft invoice to review, or swipe to approve or reject.

4. On the **Draft Invoice** screen, take any of the following actions:

   - Tap a draft invoice to view entry details.

- Tap ⦂, and tap **Approve**, **Undo Approve/Reject**, or **Reject**.

    Tapping **Reject** requires you to state a reason for the rejection.

- Tap **PDF** to view the draft invoice in PDF format.

- Tap ◀ or ▶ on the header to switch between draft invoice lines.

- Tap **Specification** to display the **Draft Invoice Lines** screen, which contains draft expense, and mileage invoice lines.

Approve Items by Batch

You can enable batch approval on the **Settings** screen, and utilize the functionality for My Approvals and Substitute Approvals for REST.

> **Note:** You cannot reject items, and undo approval or rejection by batch. Tapping **Reject** requires you to state a reason for the rejection.

1. Tap ≡, and tap **Approvals**.
2. On the **Items for Approval** screen, tap **Select Multiple**.
3. Tap the check mark beside any item from any section to mark items to approve or reject.
4. Tap **Approve Selected** to approve the items, or **Cancel** to revert the selection made.

Tasks for Supervisors

Approve or Reject a Timesheet

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

1. Tap ≡, and tap **Approvals**.
2. On **Items for Approval**, tap **Timesheets**.
3. On **Timesheets**, tap a timesheet to review, or swipe to approve or reject.
4. On the **Timesheet** screen, take any of the following actions:

    - Tap **Day** or **Job** to view the summary and timesheet entries sorted according to date or the job. To review each timesheet in detail, tap a timesheet entry either from the **Day** or **Job** view to proceed either to the **Entries by Day** or **Entries by Job** screens.

    - Tap ⦂, and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

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

    - Tap ◀ or ▶ on the header to switch between timesheets.

Approve or Reject an Expense Sheet

1. Tap ≡, and tap **Approvals**.

2. On **Items for Approval**, tap **Expense Sheet**.

3. On **Expense Sheet**, tap an expense sheet to review, or swipe to approve or reject.

4. On the **Expense Sheet** or **Mileage Sheet** screen, take any of the following actions:

   ▪ Tap ⋮, and tap **Approve**, **Undo Approve/Reject**, **Reject**, or **Message to Employee**.

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

   ▪ Tap ◄ or ► on the header to switch between expense, or mileage sheets.

   ▪ Tap **Receipt** to view attachments, if any.

Approve or Reject a Purchase Order

1. Tap ☰, and tap **Approvals**.

2. On **Items for Approval**, tap **Purchase Order**.

3. On **Purchase Order**, tap a purchase order to review, or swipe to approve or reject.

4. On the **Purchase Order** screen, take any of the following actions:

   ▪ Tap ⋮, and tap **Approve**, **Undo Approve/Reject**, or **Reject**.

   Tapping **Reject** requires you to state a reason for the rejection.

   ▪ Tap ◄ or ► on the header to switch between purchase orders.

Approve or Reject a Vendor Invoice

1. Tap ☰, and tap **Approvals**.

2. On **Items for Approval**, tap **Vendor Invoice**.

3. On **Vendor Invoice**, tap a vendor invoice to review, or swipe to approve or reject.

4. On the **Vendor Invoice** screen, take any of the following actions:

   ▪ Tap ⋮, and tap **Approve**, **Undo Approve/Reject**, or **Reject**.

   Tapping **Reject** requires you to state a reason for the rejection.

   ▪ Tap ◄ or ► on the header to switch between invoices.

   ▪ Tap **Attachments** to view attached documents, if any.

Approve or Reject a Job Quote

1. Tap ☰, and tap **Approvals**.

2. On **Items for Approval**, tap **Job Quote**.

3. On **Job Quote**, swipe a submitted job quote to approve or reject.

4. On the **Quote** screen, take any of the following actions:

- Tap a quote to view entry details on the **Quote Line** screen.

- Tap [icon], and tap Approve, Undo Approve/Reject, or Reject.

  Tapping **Reject** requires you to state a reason for the rejection.

- Tap [icon] or [icon] on the header to switch between quotes.

- Tap **PDF** to view the quote.

Approve or Reject Absence Requests

You can approve, or reject an absence request from the **Items for Approval** screen. The **Undo** action is not applicable.

1. Tap [icon], and tap **Approvals**.

2. On **Items for Approval**, tap **Absence Requests**.

3. On **Absence Requests**, tap a submitted absence request to review, or swipe to approve or reject.

4. On the **Absence Request** screen, take any of the following actions:

   - Tap [icon], and tap **Approve**, or **Reject**.

     Tapping **Reject** requires you to state a reason for the rejection.

   - Tap [icon] or [icon] on the header to switch between absence requests.

Approve or Reject Allowance Requests

You can approve, or reject an allowance request from **the Items for Approval** screen. The **Undo** action is not applicable.

1. Tap [icon], and tap **Approvals**.

2. On **Items for Approval**, tap **Allowance Requests**.

3. On **Allowance Requests**, tap a submitted allowance request to review, or swipe to approve or reject.

4. On the **Allowance Request** screen, take any of the following actions:

   - Tap [icon], and tap **Approve**, or **Reject**.

     Tapping **Reject** requires you to state a reason for the rejection.

   - Tap [icon] or [icon] on the header to switch between absence requests.

Approve Items by Batch

You can enable batch approval on the **Settings** screen, and utilize the functionality for My Approvals and Substitute Approvals.

1. Tap [icon], and tap **Approvals**.

2. On the **Items for Approval** screen, tap **Select Multiple**.

3. Tap the check mark beside any item from any section to mark items to approve or reject.

4. Tap **Approve Selected** to approve the items, or **Cancel** to revert the selection made.

> **Note:** You cannot reject items, and undo approval or rejection by batch. Tapping **Reject** requires you to state a reason for the rejection.

Settings

> **Note:** The System Administrator identifies and modifies all available individual settings for the end user.

Modify Server URL

1. Tap ☰, and **Settings**.

2. Tap **Forget me on this device**. All options and favorites are lost.

3. On the login screen, tap **Server URL**.

4. In **Server URL**, tap ⊗ to delete the current value, and enter the new URL.

5. Tap **Connect**.

Set Minute Interval for Hour Fields

1. Tap ☰, and tap **Settings**.

2. Tap the **Registration Unit** field, and tap a value.

   - **1 minute (0-59)**
   - **2 minutes**
   - **5 minutes**
   - **10 minutes**
   - **15 minutes**
   - **30 minutes**
   - **Tenths (0, 6, 12, 18, etc.)**

3. Tap **Done**.

Configure Deltek Touch Settings

5. Tap ☰, and tap **Settings**.

6. You can modify the following:

   General

Option	Description
Username	To change the current user, tap Forget Me on this Device, and log on again.
Open In	Tap the field, and tap the default screen that you want to display when you open Deltek Touch. For 2.2 and 2.1, tap Timesheet, Items for Approval, Expense Sheet, Quick Capture, Mileage Sheet, or

Option	Description
	Summary. For 2.0, tap Timesheet, Expense Sheet, Quick Capture, Mileage Sheet, or Summary. For X1, tap Timesheet or Summary
Usage Tracking	Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Deltek Touch (for example, the number of times you access the application and submit timesheets). Deltek uses this information to determine what features are being used in the application. No confidential information (such as projects, clients, or usernames) is tracked. This anonymous information is only available to Deltek and is not publicly available.

Timesheet

Option	Description
Submit Mode	This field displays which mode is used in submitting the timesheet. It displays either **Daily** (allows you to submit single days at a time) or Weekly (allows you to submit the entire week).
Week Start	This field only displays when **Submit Mode** is set to **Daily**. Tap to select whether the weeks on the **Calendar** and **Timesheet** screens start on Sunday or Monday.
Use Week Numbers	For REST, this setting is only available when Submit Mode is set to Weekly. Slide to turn on or off. Setting it to **ON** displays the week number on the **Weeks**, **Timesheet**, and **Summary** screens.
Keep on Timesheet as Default	Slide to turn on **Keep on Timesheet as Default** by default on the **Add Project** screen. Turning this on means that the **Keep on Timesheet** switch on the **Timesheet Line** screen is turned on by default when adding a new line.
Registration Unit	This field only displays when **Submit Mode** is set to **Weekly**. Tap the field, and tap a minute interval of the time picker.

Menu

Option	Description
Expense Sheet	Toggle the switch to **ON** to display **Expense Sheet** and **Quick Capture** on the sliding menu.
Mileage Sheet	Toggle the switch to **ON** to display **Mileage Sheet** on the sliding menu.
Purchase Orders	Toggle the switch to **ON** to display **Purchase Orders** on the sliding menu.
Absence Requests	Toggle the switch to **ON** to display **Absence Requests** on the sliding menu.

Option	Description
Allowance Requests	Toggle the switch to **ON** to display **Allowance Requests** on the sliding menu.
Rejections	*This setting is only available in REST*. Toggle the switch to **ON** to display **Rejections** on the sliding menu.
Approvals	Toggle the switch to ON to display **Items for Approval** on the sliding menu.

Approval Settings

Option	Description
Substitute	Toggle the switch to **ON** to display all items for substitute approvals. By default, the toggle switch is set to **OFF**.
Include Substitute Approvals in Counter	Toggle the switch to **ON** to include the number of items for substitute approvals in the counter. By default, the toggle switch is set to **OFF**.
Batch Approvals	Toggle the switch to **ON** to enable approval of items by batch. By default, the toggle switch is set to **OFF**.

Information

Option	Description
Privacy Policy	Tap to access the Legal Notices and Privacy Statement information page of Deltek.
About	Tap to view the device and operating system information, which includes the following: ■ Device Type ■ Operating System ■ User Agent Name and Version ■ Application (Web App or Native App) Version ■ Touch Sever Version ■ Web Service Version ■ Core System Version ■ Touch Server Build Version ■ Web App Build Version ■ You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek support if you have an issue with the application.

Forget me on this device – Tap to delete the server URL and your user credentials from the application, requiring URL, user ID, and password on the next login.

Reset settings to default – Tap to clear all user settings from your device's local storage. Once tapped, you are redirected to the Login screen. 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

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