



Deltek

Deltek Time & Expense for Professional Services

User Guide

January 2020

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Overview

Deltek Time & Expense for Professional Services is a time-tracking tool that allows you to view, enter, update, and submit timesheet data and expense reports as well as approve timesheets (if you are a Timesheet system administrator) from anywhere at any time using your touch screen device and synchronize that data to the Deltek Vantagepoint database.

Note: The official name of the application is *Deltek Time & Expense for Professional Services*. This document only uses it at first mention. The succeeding instances of the mobile application name display *Deltek T&E*. In addition, the application name in *Apple App Store* and *Google Play* displays *Deltek T&E for Professional Services*.

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

Note: To use the full functionality of Deltek T&E, you must be on the latest Deltek T&E Server and Deltek Vantagepoint. You can use the mobile application with the lower versions of Deltek T&E Server and Deltek Vantagepoint, but new features will not be available. Deltek T&E Server must be installed and configured using the guidelines in the *Deltek Vantagepoint Technical Installation Guide*.

Mobile Device Requirement

The Deltek T&E application supports mobile devices that run on the following operating systems:

- Apple iOS 10.0 and higher
- Android 5.0 and higher

Getting Started

Your Deltek T&E 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 T&E

If Deltek T&E has already been installed, tapping the link (second link for iOS) populates the **Server URL** field. In this case, proceed to step 3.

1. In *Apple App Store* or *Google Play*, search for the application (*Deltek T&E for PS*). Make sure that you select the correct application because Deltek has several Time & Expense applications for different products.
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.

Note:

The Deltek T&E supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.

Tap **Connection Help** on the **Server URL** screen to view information about establishing connection to Deltek T&E:

- Your administrator must install the Deltek T&E Server in order to use Deltek T&E.
- During setup, the administrator creates an application URL, which is different than your normal Deltek Vantagepoint URL that you access through a PC.
- The application URL uses the following format by default, where <server> refers to the host name of your Deltek T&E Server. The default URL can be changed to something else by your Deltek Vantagepoint administrator:
<https://<yourdomain>/vantagepoint/touch/time/visionshared/backend/vantagepointtimeurl.php>
- Make sure that the URL is correct by copying and pasting the URL from an email. For example, the **s** in **https** is often missed when typing the URL directly in the field.
- Contact support if you continue to have connection issues.

Log On to Deltek T&E for Professional Services

Initial and succeeding logins differ slightly. For initial login, you tap a link to either download the application from the appropriate app store or automatically sets up the Server URL. For succeeding logins, you only need to enter your security PIN.

1. Tap **Deltek T&E for PS**.
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: When usage tracking is enabled, the application tracks the number of times you access the application and how often you use certain features. Deltek T&E 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. The URL has the following format:
<https://<yourdomain>/vantagepoint/touch/time/visionshared/backend/vantagepointtimeurl.php>.

Attention: For more information about establishing connection to Deltek T&E, tap **Connection Help**.

4. Tap **Connect**.
5. Tap the **User ID** and **Password** fields to enter corresponding values.
6. Tap the **Database** field, and scroll through the list.
7. Tap a database, and tap **Done**.

Note: If the Single Sign-On authentication is used, the **Windows Authentication** toggle switch displays.

8. Tap the **Language** field if you want to set the app to use a different language.
9. Tap **Log In**.
10. Enter a four-digit PIN code, which you will use on your succeeding logins.

Note: Deltek T&E remembers your user name and selected database (and domain if Windows Authentication is being used) on your next login. To log on using a different user name and database, tap **Forget Me on this Device** on **Settings**. All your user settings and favorites will be lost.

Security PIN

For initial login, Deltek T&E requires you to create a PIN. Enter a four-digit PIN, and re-enter it to confirm. Instead of entering your user name and password on your next login, you need to enter your PIN.

Log On Using Windows Authentication

You can use Windows Authentication to log on to Deltek T&E. Based on a server-side setting, the application prompts you to log on using your domain credentials to log on to Deltek Vantagepoint. You then have the option to log on to Deltek Vantagepoint using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Deltek Vantagepoint server or database) requires you to use a PIN.



After your Vantagepoint Administrator sets up single sign-on, you must follow a set of login steps to enable Windows Authentication. Your Vantagepoint Administrator must give you your Azure active directory domain account user name and password.

To log on, complete the following steps:

1. On the login screen, toggle the **Windows Authentication** switch to **On**. The **Password** field becomes disabled.
2. In the **User ID** field, enter your Azure email address, and tap **Log In**.
3. On the Microsoft dialog box that requests your password, enter your Azure password, and tap **Sign In**.
4. Once your credentials are validated, the Deltek T&E for Professional Services application opens.
5. Enter a four-digit PIN, and re-enter it to confirm.

Log Out of Deltek T&E for Professional Services

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 T&E prompts you for your PIN or password on your next login regardless of the timeout period.
- Tap , and tap **Settings**. Tap **Log Out**.

Note: The application logs you out automatically when it has been idle for a period of time. If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**.

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**.
6. Enter a four-digit PIN code, which you will use on your succeeding logins.

Closing Deltek T&E for Professional Services

If you close Deltek T&E completely either from the task bar or by turning off the device, any unsaved changes are lost.

Switching Between Screens in Deltek T&E for Professional Services

If you try to perform any of the following actions when in an unsaved timesheets and expenses, Deltek T&E prompts you to save a timesheet:

- Open a different timesheet.
- Tap , and tap **Settings**.
- Tap  when you are not in the timesheet with today's date.

Switching Between Applications on the Device


If you switch between applications on the device, Deltek T&E keeps any unsaved changes in the memory as long as the application is still active on your device. If you close the application from the task list or you turn off your device, your changes will be lost.

Note: Changes are only saved in memory with the packaged application and not when accessed through the device browser via a URL.

Here are some sample scenarios, where your changes are saved in memory:

- You press the **Home** button when there are unsaved changes and opens another app (Deltek T&E is still active in the background).
- You receive a notification that directs you automatically to another application.
- A message displays and you need to respond by tapping corresponding buttons.
- A calendar invitation displays and you prefer to check the calendar.


Screen Display

The Deltek T&E user interface has the following screens, which you can navigate easily by tapping .

Periods

This screen lists all timesheet periods and their corresponding status, which determines a processing option available to you. This screen displays when you access the application initially or when you tap **Change Period** from the Timesheet menu.

Timesheet

This screen allows you to perform several tasks for your timesheet. The name of the screen varies (Units or Hours), depending on the view that you select on **Menu**, which you can accessed by tapping .

Note: You can also select a different timesheet period by tapping **Change Period** from .

Timesheet Hours

Tapping **View Hours** displays the **Timesheet Hours** screen, which allows you to enter, update, or delete hours into your timesheets.

Timesheet Units

Tapping **View Units** displays the **Timesheet Units** screen, which allows you to enter units into your timesheets so that you can record the use of non-labor items that should be billed to a project. Units are only available if they are enabled in your Deltek Vantagepoint database.

Note: This screen looks and works like the **Timesheet Hours** screen except for the displayed fields for **Units** and **Total Units** instead of **Hours** and **Total Hours**.

The **View Units** option only becomes available if your administrator has selected the **Enable unit quantities** feature option in the Timesheet Settings or the **Allow employee to charge units in timesheet** option in the Employee Info Center.

Timesheet Summary

Tapping **View Summary** displays the **Timesheet Summary** screen, which displays the summarized entries (including regular and overtime hours) per day or project for a selected timesheet period, summary of the units on your timesheet, or revision history.

Time Approval

This screen allows you (as the Timesheet approver) to view and approve employee timesheets. You can view the list of timesheets either by status or group or individual timesheets. You can also view details of an employee's timesheet by day, project, or unit.

Time Approvals

This screen allows you to view the list of timesheets either by status or group. It only displays the list of employees in groups or list of groups to which you have access and edit rights.

Time Approval

This screen allows you to view the timesheet details of a particular employee. You can view and approve timesheet details by day, project, unit, or revision history.

Expense Report

This screen lists all your expense reports with their respective status. The reports are sorted descending with the most recent report on the top. Tapping a line allows you to view the details of the selected expense report.

Note: Deltek T&E reconciles any changes that you make to Expense Reports that use credit card charges against the amount specified in the Credit Card pane of Deltek Vantagepoint core.

Expense Report

This screen displays when you tap an expense report in a list. It displays general report details about the expense report.

New Report

This screen allows you to add a new report.

Expense Approval

This screen allows you (as the approver) to review and approve expense reports.

Expense Summary

This screen allows you to view an expense report summary before approving or rejecting the expense report. It contains details, such as expense report title, employee name, expense report date, expense report amount, status, and expense lines.


Expense Details

This screen allows you to view expense report details, such as employee name, receipts, currency code (except for a single currency database), payment amount, and payment exchange rate. The details vary depending on the expense category, such as General, Travel, and Meal.

Settings



This screen helps you configure the Deltek T&E settings according to your preferences.

Help

Tap , and tap **Help** to view the user guide for this application. You can also access **Help** from **Settings**.

Field Indicators


Several indicators mark the fields on the screen when you add/edit records or configure settings. They are as follows:

- **Required** — You must enter a value in this in order to continue a task. This field is marked with an asterisk (*).
- **Editable** — This field allows you to enter a value. This field is marked with  when you enter a value. Tap  to clear the field.
- **Read Only** — This field only displays information and is not editable.

Timesheet

View the Timesheet List




On **Periods**, scroll through the list to view timesheet periods and their status. A check mark displays beside the selected period. Tap a timesheet period to edit that timesheet.

Note: To display **Timesheet** by default, make sure that **Open In** on **Settings** is set to **Current Timesheet**. The **Timesheet** screen displays **Timesheet Hours**, **Timesheet Units**, or **Timesheet Summary**, depending on the view the you select from the menu that displays when you tap .

Timesheets in Deltek T&E automatically display project details associated to a plan based on the information in Planning in core, allowing you to save time and work on your timesheets more efficiently. The details include the project name, phase, task, and labor code. This functionality works in Deltek T&E if the **Autopopulate timesheet with resource planning assignments** option is selected in the Timesheet Settings in Vantagepoint and certain conditions are met.

View a Timesheet

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

1. Either tap a timesheet period on **Periods** or tap  and tap **View Hours**.
 - The selected timesheet may or may not be the current timesheet, but you can always tap  to open the current timesheet.
 - You can always select another period by tapping  and tapping **Change Period**.
2. On **Timesheet Hours**, switch between different days of a timesheet period by swiping the calendar to the left or right. The selected day is highlighted.

Holidays and weekends display in different colors. You can choose to hide non-working days via **Settings**.

Note: If you tap **Timesheet** and a timesheet has not yet been selected, the timesheet with today's date displays. If today's date is not included in a timesheet, Deltek T&E displays the timesheet with the closest date.

Check Timesheet Status


The status of a selected timesheet and time period displays on **Periods** (below start and end dates) and **Timesheet Hours** (same line as the start and end dates). It determines which processing options are available to you.




- **In Progress** – Timesheets that are editable and not yet submitted. These timesheets display in green highlight.
- **Submitted** – Timesheets that have been submitted but not yet been approved. If your access rights allow you to resubmit, you can reopen and resubmit previously submitted timesheet. These timesheets display in gray highlight.
- **Approved** – Timesheets that have been approved and are ready to be posted. You can view and copy the timesheets, but you can no longer enter or edit data.
- **Posted** – Timesheets that have been posted. You can view and copy the timesheets, but you can no longer edit data or submit or approved the timesheets.
- **New Timesheet** – These timesheets prompt you to copy the previous timesheet before you enter data. These timesheets display in blue highlight.

Editing a Timesheet

Deltek T&E allows you to perform several tasks for your timesheet. You can enter timesheet data, add or delete a timesheet line, copy a timesheet line or an entire timesheet, delete a timesheet line, create or delete a favorite, and reopen a timesheet.

Saving a Timesheet

After you make all the changes, you need to tap  so that Deltek T&E can save the updated timesheet line to the Deltek Vantagepoint.

- You can update several timesheet lines and save after you make all changes.
- If you tap  and there are unsaved changes, Deltek T&E saves your changes automatically.
- If a signature is required, Deltek T&E prompts you for your PIN.
- If a signature is not required, Deltek T&E displays a confirmation message about the submission.
- For a new timesheet, if you tap  and you have set Auto-Copy the Timesheet Upon Submit to ON on Settings, Deltek T&E creates and saves the timesheet immediately. In this case, you do not need to tap .

Errors and Warning Indicators

When you try to save a timesheet and there is a problem, Deltek T&E displays a corresponding error or warning indicator to help you easily identify the lines that you need to address.

- If a line has an error and a warning, the error indicator displays on the Timesheet screen. A red bar on the left of the line indicates an error, while a yellow bar indicates a warning. Timesheets with errors cannot be saved until the error is resolved.
- If a line has multiple errors and warnings, all of the messages display on the **Edit Line** screen with the errors listed at the top. The Error or Warning icon displays for each message.
- If you get an error while adding a line, Deltek T&E returns you to the **Edit Line** screen with the error listed at the top.


Enter Time on Timesheet Screen (Quick Entry)

Deltek T&E only allows you to enter Regular Time for projects directly on **Timesheet**. If you need to enter overtime, start/end times, or modify other aspects of the line, tap anywhere else on the line (for example, tap the project name).

If there are already **Overtime** entries or required fields that are empty for a selected day, the **Timesheet Line** screen displays. You must enter the time on **Edit Line**.

Note: Depending on your settings, you can either use a time picker or device keypad when selecting or entering values in timesheet hour fields. You can control this setting in the **Number Entry** field on **Settings**.

The keypad is not supported if start and end times are used.


1. Swipe the calendar to select a date, or tap the date.
2. Tap the hour field of a selected line.
3. Either scroll through the time picker to select the appropriate time or enter the time using the keypad.
4. Tap **Done**.
5. Tap .

Enter Time on Edit Line Screen (Detailed Entry)



Note: Depending on your settings, you can either use a time picker or device keypad when selecting or entering values in timesheet hour fields. You can control this setting in **Number Entry** on **Settings**.

The keypad is not supported if start and end times are used.

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list of timesheet lines.
4. Tap anywhere in a timesheet line except the hour field.
5. On **Edit Line**, tap the field that you want to update, and enter or tap the appropriate values.

6. Tap **Done**.
7. On **Timesheet Hours**, tap .

Add a Timesheet Line

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Tap .
4. On **Find Project**, filter projects by tapping **All** or **Favorites**, or entering part of a name, number, or client in the search field. Deltek T&E first searches through your favorite and recently used projects.
 - If the project for which you are searching is in the list, tap it.
 - If the project is not in the list, tap **Continue Search on Server** to search all of Deltek Vantagepoint.
 - If this project has phases and/or tasks, you need to select the phase and/or task.
5. Depending on your settings, most details of the line will be defaulted for you. Make any changes to this line as appropriate, including adding hours, and tap **Done**.
6. Tap .

Selecting Phases and Tasks

If the selected project has phases and/or tasks, the first page of the appropriate screen displays automatically by default. You can enter part of a phase/task name and tap the search button, or scroll through the list and tap the desired phase/task. Both phases and tasks display in alphabetical order by code, but you can search either by code or name.




The search results (including the initial list of phases or tasks) follow the **Search result display by** value that you set on **Settings**.

Note: When editing a line, you can tap the **Phase** or **Task** field on **Edit Line** to display either the **Phase** or **Task** screen.

Copy a Timesheet Line

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list of timesheet lines.
4. Touch and hold the line until **Copy Line** displays, and tap it. Alternatively, you can tap the timesheet line to display the **Edit Line** screen, and tap **Copy Timesheet Line**.

Copy a Timesheet

1. On **Periods**, tap a timesheet period that you want to copy into another timesheet.
2. On **Timesheet Hours**, tap  then **Copy Timesheet**.
3. On **Select Timesheet**, tap the timesheet to which you want to copy the projects. Only the In Progress and New timesheets display. Deltek T&E copies project lines into the selected timesheet if they do not yet exist. The selected timesheet then displays with the new projects.
4. Enter or tap appropriate timesheet details.
5. Tap  to save or  to submit.

You can also copy an entire timesheet in the following ways:

- When you open a new timesheet, you receive an option to copy the previous timesheet if it is still on the device. If the status of the previous timesheet that you want to copy is **Approved**, **Posted**, or **Closed**, Deltek T&E copies all details except for the hour values and comments. Closed timesheets, however, only display if the timesheet dates are within 90 days before or after today's date.
- When you submit a timesheet, the application copies it automatically into the next timesheet if it is available (the next timesheet period has been opened by accounting) and you have enabled the **Auto-Copy Timesheets upon Submit** option on **Settings**.
- When you submit a timesheet, the application prompts you to copy it into the next timesheet if the next timesheet is available (the next timesheet period has been opened by accounting) and you have disabled the **Auto-copy Timesheets upon Submit** option on **Settings**.

Delete a Timesheet Line

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list of timesheet lines.
4. Take one of the following actions:
 - Swipe across the selected line in either direction (left-to-right or right-to-left), and tap **Delete**.
 - Touch and hold the selected line until options display. Tap either **Delete Entire Project** or **Delete Time on this Day Only**.
 - Tap the line to display the **Edit Line** screen, and tap **Remove from Timesheet**. Deltek T&E asks you whether you would like **Delete Entire Project** or **Delete Time on this Day Only**.

Select a Labor Code for a Line

Deltek T&E allows you to filter available labor codes using the **Filter Budgeted Levels** toggle switch. The default setting, however, is based on project settings on the Project Info Center of Deltek Vantagepoint.

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Labor Code** field.
5. To use **Filter Budgeted Levels**, toggle to limit the list to labor codes budgeted for this project.
6. Scroll through the list, and tap a labor code.
7. Tap **Done**.

Note:

- When the project that you are updating is set to **Warning** in Deltek Vantagepoint, the **Filter Budgeted Levels** toggle switch is editable in Deltek T&E.
- When the project that you are updating is set to **Error** in Deltek Vantagepoint, the toggle switch is set to **ON** by default and the list only displays budgeted labor codes in Deltek T&E.
- When the **Budget Source** budget validation is set to **Project Planning** and **Budgeted Level** is set to **Employee Only** in Deltek Vantagepoint, the toggle switch does not display in Deltek T&E.
- If the project is not set to budgeting at all, the toggle switch does not display.

Select a Labor Category for a Line

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Labor Category** field.
5. Scroll through the list or enter a keyword in the search field.
6. Tap a category.
7. Tap **Done**.

Select a Payroll Tax Locale for a Line

Locales are used to track hours and cost where work is performed. The field only becomes available when **Payroll** is enabled and your **Locale Method** is set to **Follow Project Locale** on the **Payroll** tab of your employee record in Deltek Vantagepoint.

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Payroll Tax Locale** field.
5. Scroll through the list, and tap the appropriate value.


6. Tap **Done**.
7. If you are done editing the other fields, tap **Done**.

Adding Start/End or Meal Time for a Line or by Day

The **Start Time/End Time** and **Meal Start/EndTime** only display in Deltek T&E when the required settings are enabled in core. If there is an overlapping time, Deltek T&E does not allow you to save the timesheet. You can either add the start/end time or meal time by project or by day, depending on the settings selected in core.

Add a Start/End Time for a Line

If Deltek Vantagepoint is configured to track start and end times by project, you need to enter start and end times by line.

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day (or tap the day).
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap  in the **Regular Hours** field.
5. Tap the **Start Time** and **End Time** fields to select corresponding values from the list, which displays below the fields.
6. Tap **Done**.

Add a Meal Start/End Time for a Line


1. On **Periods**, tap a timesheet period containing the day that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap any line on the timesheet.
4. On **Edit Line**, tap either the **Meal Start Time** or **Meal End Time** fields to select corresponding values from the list, and tap **Done**. Meal times cannot overlap times worked on projects.
5. Tap the **Number of Breaks** field to enter a value.
6. If you are done editing the other fields, tap **Done**.

Add a Start/End Time by Day

If Deltek Vantagepoint is configured to track start and end times by day, you need to enter start and end times by day. You can set the start/end time for specific days or all days. If you set the **Start/End Time** on **Settings**, the specified hours apply to all days.


1. On **Periods**, tap a timesheet period containing the day that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day (or tap the day), and tap **Add Start/End Time**.
3. On **Start/End Times**, enter the appropriate values.
4. If you want to apply the values to all days in the period or as default, set the corresponding toggle switch.
5. Tap **Done**.

Edit a Start/End Time by Day


1. On **Periods**, tap a timesheet period containing the day that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day (or tap the day), and tap .
3. On **Start/End Times**, enter the appropriate values, and tap **Done**.

Add a Meal Time by Day

You can set the meal time for specific days or all days. If you set the **Meal Start Time** and **Meal End Time** on **Settings**, the specified hours apply to all days.


1. On **Periods**, tap a timesheet period containing the day that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day (or tap the day), and tap either **Add Start/End Time** or .
3. On **Start/End Times**, tap Meal start/end time fields, and enter appropriate values.
4. Tap the **Number of Breaks** field to enter a value, and tap **Done**.

Edit a Meal Time by Day


1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day (or tap the day), and tap .
3. On **Meal start time** and **Meal end time**, enter appropriate values, and tap **Done**.

Create a Favorite

Favorites include projects that you access and use most of the time to complete your timesheet.


1. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
2. Tap .
3. Verify that **Find Project** displays **All**.
4. 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 Deltek Vantagepoint.
5. Tap the white star to the left of a project to make it a favorite. It turns to a gold star.

Delete a Favorite

1. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
2. Tap .
3. Scroll through the list or enter a name, number, or client in the search field.
4. Tap the gold star to the left of a project to unmark it as a favorite. It turns to a white star.

Add a Comment to a Timesheet


Deltek T&E does not support formatted comments.


1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. Enter your comments, and tap **Done**.
6. If you are done editing the other fields, tap **Done**.
7. Tap .

Note: You can also use a comment that was used previously on this timesheet or a global comment by tapping





Use a Historic/Global Comment

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. Tap .
6. Scroll through the **History/Global** list, and tap a comment.

7. Use or edit the selected comment, and tap **Done**.
8. Tap .


Note: The updated comment does not replace the original; it becomes a new comment in the history list.

Delete a Comment from a Timesheet

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. In **Comments**, tap .
6. Tap **Done**.
7. Tap .



View Timesheet Summary

The **Timesheet Summary** screen displays the summarized entries (including regular and overtime hours) per day or project for a selected timesheet period. It also displays the revision history.

1. On **Periods**, tap a timesheet period for which you would like to view summarized information.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Tap , and tap **View Summary**.
4. Tap **Day** or **Project** to view the summarized information by day or project, or tap **Audit** to view revisions made.



Enter Unit on Timesheet Units (Quick Entry)

You can enter a number for existing lines directly on the **Timesheet Units** screen. If there are required fields (such as **Unit Table**) that are empty for the selected line, the **Edit Unit** screen displays.

1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and tap the unit field of a selected line.
5. Enter number of units, and tap .




Enter Units on Edit Unit (Detailed Entry)

If a selected project, phase, or task combination has a **Unit Table** on the **Accounting** tab in Deltek Vantagepoint, Deltek T&E automatically selects that **Unit Table** for you.

1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and tap anywhere in a selected line.
5. On **Edit Unit**, tap **Units**.
6. On **Units**, filter units by entering a part of a name or number in the search field or scrolling through the list.
 - If the unit for which you are searching is in the list, tap it.
 - If the unit is not in the list, tap **Load More Units** to display the next set of search results.
7. Tap **Done**.
8. Tap .



Add a Unit Line

A timesheet line can have units but no time logged; a timesheet line can have hours but no units.

1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Tap .
5. On **Find Project**, filter projects by tapping **All** or **Favorites**, or entering part of a name, number, or client in the search field. Deltek T&E first searches through your favorite and recently used projects.
 - If the project for which you are searching is in the list, tap it.
 - If the project is not in the list, tap **Continue Search on Server** to search all of Deltek Vantagepoint.
 - If this project has phases and/or tasks, you need to select the phase and/or task.
6. Tap a project, and tap **Done**.
7. On **Add Project**, make any changes to this line as appropriate, including selecting unit table and adding unit, and tap **Done**.
8. Tap .




Note: If you add a line to the list on **Timesheet Units**, Deltek T&E does not add it automatically to **Timesheet Hours**. If you add time to a line on **Timesheet Hours**, however, Deltek T&E adds the updated line automatically to the list on **Timesheet Units**.

Add a Description to a Unit

1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and tap the appropriate timesheet line.
5. On **Edit Unit**, tap the **Description** field.
6. Enter a description or comment, and tap **Done**.
7. If you are done editing the other fields, tap **Done**.
8. Tap .


Note: You can also use a description that was used previously on this timesheet by tapping **+**.

Delete a Description from a Unit


1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and tap the appropriate timesheet line.
5. On **Edit Unit**, tap the **Description** field.
6. In **Description**, tap .
7. Tap **Done**.
8. If you are done editing the other fields, tap **Done**.
9. Tap .

Copy a Unit Line

Copying a timesheet does not copy the unit lines and description. The **Units** screen is blank until you either add time to a non-special category line on **Timesheet** or you add a line to the **Units** screen.

1. On **Periods**, tap a timesheet period that contains the project that you want to copy.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and perform one of the following actions:
 - Touch and hold the line until **Copy Unit** displays, and tap it.
 - Tap the unit line to display the **Edit Unit** screen, and tap **Copy Unit**.


Delete a Unit

1. On **Periods**, tap a timesheet period that contains the project to which you want to add a unit line.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and perform one of the following actions:
 - Swipe across the selected line in either direction (left-to-right or right-to-left), and tap **Delete**.
 - Touch and hold the selected line until options display. Tap either **Delete Entire Project** or **Delete Units on this Day Only**.
 - Tap the line to display the **Edit Line** screen, and tap **Remove from Timesheet**. Deltek T&E asks you whether you would like **Delete Entire Project** or **Delete Units on this Day Only**.

View Unit Summary

Aside from allowing you to view summarized entries for a selected timesheet period per day or project, the **Timesheet Summary** screen also allows you to view the summary of the units on your timesheet.


Note: The **Units** button only becomes available if units are enabled in Deltek Vantagepoint.

1. On **Periods**, tap a timesheet period containing the project that you want to view.
2. Tap , and tap **View Summary**.
3. On **Timesheet Summary**, tap **Units**.

View Revision History

You can no longer edit revision comments once you have saved them. You can only view them.

Note: The **Audit** tab only displays if **Enable timesheet revision auditing** is enabled in Deltek Vantagepoint.

1. On **Periods**, tap a timesheet period containing the project that you want to view.
2. Tap , and tap **View Summary**.
3. On **Timesheet Summary**, tap **Audit**.
4. Scroll through the list, and tap the revision which details you want to view.
5. On **Revision Audit**, verify the information or tap **Explanation for Revision** to enter your reason, and tap **Done**.
6. Tap the back button to return to **Timesheet Summary**.

Entering Revision Explanation

When the following settings are set in Deltek Vantagepoint, Deltek T&E requires you to enter an explanation when you make changes to a timesheet:



- **Enable Timesheet Revision Audit** and **Enable Revision Explanation** are selected in settings.
- **Disable Timesheet Revision Auditing** is not selected for your employee record.

Enter or Select an Explanation for Revisions Made




1. On **Periods**, tap a timesheet period containing the project that you want to view.
2. Enter or tap appropriate values. Depending on the settings, revision explanations will be required when you save or submit entries on days prior to today or after you initially submit.
3. Tap **Save** or **Submit**.
4. On **Revision Audit**, enter your revision explanation or tap **+** to select an appropriate explanation from the list.
5. Tap **Done**.

Submit a Timesheet

You can submit a timesheet from the **Timesheet** screens.




1. On **Periods**, tap a timesheet period containing the project that you want to submit.
2. If desired, tap , and tap **View Summary** to ensure that you have entered all of your time for this period.
3. Tap , and tap **Yes** to confirm.

Note:

- If you need to sign the timesheet, Deltek T&E prompts you for your password or PIN.
- If there are any errors or warnings, a notifications screen displays. If there are only warnings, you can either tap **Continue** to submit the timesheet or tap the back button to return to the timesheet and make changes. If there is an error, you need to tap the back button to return to the timesheet and correct it before submitting. Lines that caused the error or warning have red or yellow indicators next to them. Red indicates an error and yellow a warning.
- If you have rights to reopen the timesheet,  becomes  after submission. Otherwise, submitted timesheets are read-only.
- For a new timesheet, if you tap  and you have set **Auto-Copy the Timesheet Upon Submit** to **ON** on **Settings**, Deltek T&E creates and saves the timesheet immediately. In this case, you do not need to tap.

Reopen a Timesheet

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



1. On **Periods**, scroll through the list to select a period.
2. Tap the submitted timesheet period.
3. On **Timesheet Hours**, tap . The button becomes  and the timesheet's status becomes **In Progress**.
4. Update the timesheet, and tap .

Note: You can also reopen the timesheet on **Timesheet Units** and **Timesheet Summary**.











Timesheet Approval

This section only applies to Timesheet approver. It only displays the list of timesheets to which you (as the administrator) have approve or edit rights. You can only approve **Submitted** timesheets.

View Timesheet List for Approval

1. Tap , and tap **Time Approvals**.
2. On **Time Approvals**, tap **Status** or **Group**, depending on how you want to view the timesheets.
3. Scroll through the list or use the search field to filter the list. In using the search field, enter part of the first, preferred, or last name to find records in the list. Deltek T&E displays all entries containing the part that you enter. To clear your search, tap .





Review a Timesheet

1. On **Time Approvals**, tap an employee whose timesheet you want to review. Tap **Status** or **Group**, depending on how you want to filter the list.
 - If you want to change the company (if multi-company is used), tap , and tap **Change Company**. In the list of companies, tap a company, and tap **Done**. You can only view and select companies to which you have approve rights.
 - To approve multiple timesheets, tap  for those timesheets, tap , and tap **Approve Selected Timesheets**.
 - To add another approver or reassign approval of the selected timesheet, tap  and tap **Reassign Approval**.
 - To send a quick message to an employee (or employees), tap , and tap **Email Selected Employees**. The default email application of your device with the selected employee's email address in the **To** field displays.
2. On **Time Approval**, you can view the details by day, project, or unit by tapping the corresponding tab.
 - To enter a comment before you approve, tap , and tap **Approve with Comment**.
 - To reject a timesheet, tap , and tap **Reject Timesheet**.
 - To add another approver or reassign approval, tap  and tap **Reassign Approval**.
 - To send a message to the employee, tap , and tap **Send Email**.
 - To go back to **Time Approvals**, tap , and tap **Approval List**.


Note: When you tap **Approve**, **Reject**, or **Reassign**, Deltek T&E verifies that there are no changes to the selected timesheet in Deltek Vantagepoint. In case there is a change in Deltek Vantagepoint, Deltek T&E informs you about it and reloads the affected timesheet. Only those timesheets with conflict in Deltek Vantagepoint do not proceed with the approval, rejection, or reassignment.

Approve a Timesheet or Multiple Timesheets

This task assumes that you have already reviewed the timesheet(s).

1. On **Time Approvals**, tap  to select an employee or employees whose timesheet(s) you want to approve.
2. Tap , and tap **Approve Selected Timesheets**.
 - You can also approve an individual timesheet on **Time Approval**. To do this, tap the employee on **Time Approvals**, and tap  on **Time Approval**.
 - Alternatively, on **Time Approval**, you can tap  and tap **Approve with Comment**. On **Approve Timesheet**, enter your comment and tap **Approve Timesheet**.

View Revision History

1. Tap , and tap **Time Approval**.
2. On **Time Approval**, scroll through the list to find the employee whose timesheet you have approved or need to approve/update.
3. On **Time Approval**, tap **Audit** to view the revision list for the selected employee. For **Approved** items, **Audit** is selected by default.
4. On **Timesheet Summary**, tap **Audit**.

Expense Report


Expenses are grouped by Expense Reports. Each expense report has general information about the report and lines associated with the report. You can create, update, or submit an expense report from within Deltek T&E.

Note: To display **Expense Report** by default, make sure that **Open In** on **Settings** is set to **Expense**.


Default Expense Location

If the **Tax Auditing** feature is enabled, you can override the default tax codes for expense reports based on expense report categories and your rights. You can set the default expense location in the mobile application by selecting a value in the new **Default Expense Location** field on the **New Report** or **Expense Report** screen. The options include all expense locations that have been set up in the All Groups and any of your expense group categories. Changing the default expense location, however, does not affect existing expense sheet lines.

View the Expense Report List

1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list to view expense reports, which are sorted descending with most recent at the top. The list displays the last 25 reports.

View Expense Report Details





1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list to view expense reports.
3. Tap a report to view details.

Adding an Expense Report




There are two ways of adding an expense report:

- Create a new report using the **New Report** screen.
- Open an existing report and copy it to create a new one.



Add an Expense Report

1. Tap , and tap **Expense Report**.
2. On **Expense Report**, tap .
3. On **New Report**, enter or select necessary details, and tap **Done**.
4. On **Expense Report**, make any changes to this report as appropriate, including adding expenses. Depending on your settings, certain details are defaulted for you. You can also add an expense by tapping , which displays the **Edit Line** screen.
5. Tap .

Copy an Expense Report


1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report that you want to copy.
3. On **Expense Report**, tap  and tap **Copy Expense Report**. If there are unsaved changes to the expense report, the application prompts you to save the report.
4. On **Expense Report**, make any changes to this report as appropriate, including adding expenses. Depending on your settings, certain details are defaulted for you.
5. Tap .

Add an Expense Line


1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report to which you want to add an expense line.
3. Tap .
4. On **Edit Line**, make any changes to this report as appropriate.
5. Tap **Done**.

Note: You can also access **Edit Line** by tapping **Done** on **New Report** and then tapping .

Edit an Expense Line



1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report that you want to update.
3. On **Expense Report** (detail view), scroll through the **Expense Lines** list and tap the line that you want to edit.
4. On **Edit Line**, make any changes to this report as appropriate.
5. Tap **Done**.

Copy an Expense Line


1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report with the expense line that you want to copy.
3. Scroll through the list of expense lines, and tap the expense line that you need to copy.
4. On **Edit Line**, tap **Done and Copy**.
5. Make any changes to this report as appropriate, and tap **Done**.

Note: You can also copy an expense line by tapping the expense line that you want to copy until **Copy Line** displays on the **Expense Report** screen and then tapping **Copy Line**.

Delete an Expense Report

1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report that you want to delete.
3. Tap , and tap **Delete Expense Report**.
4. Tap **Yes** to confirm deletion.

Delete an Expense Line

1. Tap , and tap **Expense Report**.
2. On **Expense Report**, scroll through the list and tap the report containing the line that you want to delete.
3. Under **Expense Lines**, scroll through the list and tap the line.
4. On **Edit Line**, tap **Delete Expense Line**.
5. Tap **Yes** to confirm deletion.


Searching for an Account

To search for and display an account, tap the **Account** field on the **Edit Line** screen. Entering one character allows the application to search for accounts that have a number or name that begins with that character. Entering multiple characters allows it to search for accounts that have a number or name containing that text.

- Only those accounts that have a status set to give a **Warning** or **No Message** in the **Account System Settings** are included in the search.
- Only accounts that are appropriate for a selected project, phase, or task, and whether this expense is billable are included in the search results.

Select Default Currency and Exchange Rate

Deltek T&E allows you to select or update default transaction currency and exchange rate for an expense report. This screen, however, only displays if **Multicurrency** is enabled in Deltek Vantagepoint.

1. Open the **Currency Options** screen by taking one of the following actions:
 - On **New Report**, tap **Currency Options**.
 - On **Expense Report** screen, tap  and then tap **Currency Options**.
2. Make any changes to the **Currency Options** screen as appropriate.
 - The **Default Transaction Currency** field displays the currency, which you usually select on the **New Report** screen or is selected by default from the **General Company Settings** in Deltek Vantagepoint. You can always change the currency on the individual expense lines if needed.
 - Select one of the following options from the **Method** drop-down list under **Override Transaction Currency Exchange Rate**:
 - **None** – Tapping this option only displays **None** in the **Method** field.
 - **Date** – Tapping this option displays the **Date** field below the **Method** field. It allows you to select a date from the calendar. The application uses the date to select the currency exchange rate (which is determined by the **Daily Exchange Rate** in **Settings** in Deltek Vantagepoint) for newly added expense lines.
 - **Rate** – Tapping this option displays the **Rate** field below the **Method** field. Tapping this field displays the virtual keyboard with numbers and symbols, which you can tap to enter a value. It overrides the rate used for new expense lines.

Selecting a Tax Code

The **Total Tax Amount** fields only displays on the **Expense Line** screen if **Tax Auditing** is enabled in the **Accounting Company Settings** of Deltek Vantagepoint. Only tax codes that have **Employee Expenses** selected in the **Inputs** section are available for an expense line.


Note: You can only change the tax codes if the **Allow staff users to change tax codes** option is selected in the **Expense Category** settings. If you change the amount, the **Net Amount** for this expense line is recalculated using **Amount - Total Tax Amount = Net Amount**.

Expense Location

You can only change the expense location on the **Add Tax Code** and **Edit Tax Code** screens if you have appropriate rights. The options for this field include all expense locations that have been set up for an expense category of a particular line. If the **Expense Location** field is not applicable, the field does not display.

Note: All tax codes associated with the expense location for the expense category are filled in and calculated on the Taxes screen. If you change the expense location in a line, the existing tax codes are removed from that line. Moreover, the tax codes for the updated location are automatically added to the Taxes screen and all taxes are calculated.

Add a Tax Code to an Expense Line

1. On **Edit Line**, tap **Total Tax Amount**.
2. On **Taxes**, tap .
3. On **Add Tax Code**, tap the **Tax** field.
4. Scroll through the list, tap the appropriate tax code, and tap **Done**.
5. In **Tax Amount**, enter a value.
6. Tap **Done**.

Edit a Tax Code on an Expense Line



You can select any tax code for a line if you have rights to change tax codes for the expense category.

1. On **Edit Line**, tap **Total Tax Amount**.
2. On **Taxes**, scroll through the list, and tap the tax code you want to edit.
3. On **Edit Tax Code**, make any changes to this report as appropriate.
4. Tap **Done**.




Delete a Tax Code from an Expense Line

1. On **Edit Line**, tap **Total Tax Amount**.
2. On **Taxes**, scroll through the list, and tap the tax code you want to edit.
3. On **Edit Tax Code**, tap **Delete Tax Code**.
4. Tap **Remove**.

Attaching a Receipt




You can attach a receipt by tapping  to take a picture of the receipt or tapping  to select it from the camera gallery. Deltek T&E resizes automatically any file attachment that exceeds 5 MB.

Attach a Receipt and Associate with an Expense Line

1. On **Edit Line**, tap  in the **Receipt** field.
2. Focus your device's camera on the receipt, and tap .
3. Tap **OK**. If you want to retake the picture, tap **Retry**.
4. On **Picture**, tap **Next**.
5. If you need to retake the picture, tap . Otherwise, skip this step.
6. On **Receipt**, enter a description. The same description displays in **File Name**. You can change it if you want.
7. Tap **Done**.

Note: If you do not want new lines to be associated automatically with this receipt, leave the **Associate with new lines** toggle switch off.

Select an Existing Picture from Camera Gallery


1. On **Edit Line**, tap .
2. On **Picture**, tap either  or , and tap a picture.
3. On **Picture**, tap **Next**.
4. On **Receipt**, enter a description. The same description displays in **File Name**. You can change it if you want.
5. If you want to associate new lines automatically with this receipt, toggle the **Associate with new lines** switch to **ON**.
6. Tap **Done**.

Select an Existing Receipt for an Expense Line


1. On **Edit Line**, tap the field with the number of receipts attached.
2. On **Receipts**, tap the receipt that you want to attach.
3. On **Receipt**, you can edit the description.
4. If you want to associate new lines automatically with this receipt, toggle the **Associate with new lines** switch to **ON**.
5. Tap **Done**.

Submit an Expense Report

You can submit an expense report from the **Expense Report** screens.




1. On **Expense Report**, tap a period containing the expense report that you want to submit.
2. Tap , and tap **Yes** to confirm.

Note:

- If you need to sign the expense report, Deltek T&E prompts you for your password or PIN.
- If there are any errors or warnings, a notifications screen displays. If there are only warnings, you can either tap **Continue** to submit the expense report or tap the back button to return to the report and make changes. If there is an error, you need to tap the back button to return to the report and correct it before submitting. Lines that caused the error or warning have red or yellow indicators next to them. Red indicates an error and yellow a warning.
- If you have rights to reopen the expense report,  becomes  after submission. Otherwise, submitted expense reports are read-only

Reopen an Expense Report



You can only reopen and resubmit expense reports if the **Allow Staff Users to resubmit Expense reports** option is selected under Company Expense settings. There are some cases where you can submit in Deltek Vantagepoint, but not in Deltek T&E.

1. On **Expense Report**, scroll through the list to select a period.
2. Tap the submitted expense report period.
3. On **Expense Report** (detail view), tap . The button becomes  and the expense report's status becomes **In Progress**.
4. Update the expense report, and tap .








Expense Approval

This section only applied to users assigned as approvers. It only displays the list of expense reports to which you (as the administrator) have approve or edit rights. You can only approve **In Progress** or **Submitted** timesheets.

View Expense Report List for Approval

1. Tap , and tap **Expense Approval**.
2. On **Expense Approval** (list), scroll through the list of expense reports or use the search field to filter the list. In using the search field, enter part of the first, preferred, or last name, or part of the expense report name to find records in the list. Deltek T&E displays all entries containing the part that you enter. To clear your search, tap .



Review an Expense Report

1. On **Expense Approval** (list), tap an employee whose expense report you want to review.
 - To have another employee review the expense report in addition to yourself or reassign approval the expense report to another employee in case you cannot approve it yourself, tap , and tap **Reassign Approval**.
 - To send a quick message to an employee (or employees), tap , and tap **Email Selected Employee**. The default email application of your device with the selected employee's email address in the **To** field displays.
2. On **Expense Summary**, tap an expense line to review the expense report details. When viewing the line detail, you can use the next and previous buttons to view each line. You can also tap the camera to view attached receipts.
 - To enter a comment before you approve, tap , and tap **Approve with Comment**.
Otherwise, tap  to approve without entering a comment.
 - To reject the expense report, tap , and tap **Reject Expense Report**. On the Comment field, enter your explanation.
 - To reassign the expense report to another employee to approve in case you cannot approve for some reason, tap , and tap **Reassign Approval**.
 - To return to the **Expense Approval** screen containing the list of all expense reports that need approval, tap , and tap **Approval List**.

Note: The **Approve with Comment**, **Reject Expense Report**, and **Reassign Approval** options become disabled if the expense report has been approved or rejected.

Approve an Expense Report


This task assumes that you have already reviewed the expense report.

1. On **Expense Approval**, tap an employee whose expense report you want to approve.
2. Tap . Alternatively, you can tap , and tap **Approve with Comment**.


Settings

Set a Default View



Depending on your settings, Deltek T&E opens either on the **Timesheet Periods**, **Current Timesheet**, or **Expense** screen.

1. Tap , and tap **Settings**.
2. On **Settings**, tap **Open In** and tap an option.
3. Tap **Done**.

Change PIN


1. Tap , and tap **Settings**.
2. On **Settings**, tap **Change PIN**.
3. On **Change PIN**, enter your current password, and tap **Done**.
4. Enter your PIN, and reenter it to confirm.

Modify Server URL

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

Set the Number of Displayed Search Results


This task allows you to control the number of project records that Deltek T&E displays at one time. If more projects match your criteria, you can tap **Load More Projects** to get the next set of records.

1. Tap , and tap **Settings**.
2. On **Settings**, tap the **Search Result Display By** field.
3. Scroll through the list to select a value.
4. Tap the value, and tap **Done**.


Enable/Disable Usage Tracking

Usage tracking keeps a record of the number of times you accessed Deltek T&E and the features that you used.

Note: Usage tracking keeps a record of the number of times Deltek T&E is accessed and the features used for research purposes. This information is used to help determine product direction.

1. Tap , and tap **Settings**.
2. On **Settings**, use the **Usage Tracking** slider to enable (**ON**) or disable (**OFF**) usage tracking.

Set the Number Entry


1. Tap , and tap **Settings**.
2. On **Settings**, tap the **Number Entry** field.
3. Tap **Use Picker** or **Use Keypad**.

If you select the picker, scroll through the time picker on a particular screen to find the appropriate time. If you need to correct time on a project by entering negative hours, use the +/- portion of the picker to select the negative sign.


If you need to enter start and end times by line or day, you cannot use **Use Keypad**.

4. Tap **Done**.


Set the Default Start/End Times

1. Tap , and tap **Settings**.
2. On **Settings**, tap the **Start Time/End Time** or **Meal Start Time/Meal End Time** fields.
3. On **Start/End Times** or **Meal Time**, scroll through the time picker on a particular screen to find the appropriate time.
4. Tap **Done**.

Configure Deltek T&E Settings

1. Tap , and tap **Settings**.
2. On **Settings**, modify any of the following settings:
 - **User ID** – To change the current user, tap **Forget Me on this Device**, and log in again. All options and favorites are lost.
 - **Database** – To change the current database to which you are logged in, tap **Forget Me on this Device** and then log in again. All options and favorites are lost.
 - **Open In** – Tap to select whether the application opens on the **Timesheet Periods**, **Current Timesheet**, or **Expense** screen.
 - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Deltek T&E (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.

- **Display Non-Working Days** – Slide to turn on or off to determine whether or not non-working days are displayed on **Timesheet**.
- **Search Result Display By** – Tap the field to select the number of search results that you want to display at one time. If more projects match your search, you can tap **Load More Projects** to view them.
- **Auto-Copy Timesheet Upon Submit** – Slide to turn on or off, allowing Deltek T&E to copy lines (except for hours) of a submitted timesheet into the next timesheet with the **New** status.
- **Number Entry** – Tap the field to select either **Use Picker** to use the iOS standard picker or **Use Keypad** to use a number keypad when entering numbers in hour fields. If you select **Use Picker**, time displays in hours and minutes. If you select **Use Keypad**, time displays in hours using a decimal.
- **Help** – Tap to access the Deltek T&E help. You can also access **Help** by tapping , and tapping **Help**.
- **Privacy Policy** – Tap to view 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 (Native App or Web App) Version
 - Deltek T&E Server Version
 - Web Service Version
 - Core System 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.

- **Change PIN** – Tap this button to create a new PIN code. Tapping this button directs you to the **Change PIN** screen, where you need to enter your password first before you can create the new PIN.
- **Start Time/End Time** – Tap to set the default start and end times by day. These values display automatically on **Timesheet Hours**.
- **Meal Start/End Time** – Tap to set the default start/end meal times.
- **Log Out** – When you close Deltek T&E on the device, there is a timeout period during which you do not have to enter your password or PIN when you reopen the application. After the timeout period expires, the application logs you out automatically. You must enter your PIN or password when you reopen it. You can, however, tap **Log Out** to force the logout before the timeout period expires.

You can also log out by tapping , and tapping **Log Out**.

- **Forget Me on this Device** – Tap to delete all information details from the application, requiring user ID, password, and database on the next login. All options and favorites are lost.

Note: Fields and toggle switches for **Start/End Time** and **Meal Start/End Time** displays on **Settings** if the start and end times are enabled by day in Deltek Vantagepoint.

Appendix: If You Need Assistance

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

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

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

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Additional Documentation

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
Deltek Vantagepoint Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Vantagepoint Installation and Maintenance Guide	This document contains installation requirements and procedures to successfully install, set up, and upgrade Deltek Vantagepoint as well as the mobile versions.

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