

# Deltek Touch Time & Expense for Vision 1.4.1

User Guide

April 2015

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# Contents

- Overview ..... 1
  - Mobile Device Requirements ..... 1
- If You Need Assistance ..... 2
  - Customer Services ..... 2
  - Customer Care Connect Site ..... 2
  - Additional Documentation ..... 3
- Getting Started..... 4
  - Install Touch Time & Expense ..... 4
  - Log On to Touch Time & Expense ..... 4
  - Security PIN ..... 5
  - Log Out of Touch Time & Expense ..... 5
  - Closing Touch Time & Expense ..... 5
  - Switching Between Screens in Touch Time & Expense ..... 6
  - Switching Between Applications on the Device ..... 6
- Screen Display..... 7
  - Periods ..... 7
  - Timesheet..... 7
  - Expense Report..... 8
  - Settings ..... 8
  - Help ..... 8
  - Field Indicators ..... 8
- Timesheet..... 9
  - View the Timesheet List ..... 9
  - View a Timesheet..... 9
  - Check Timesheet Status ..... 9
  - Editing a Timesheet..... 10
  - Saving a Timesheet..... 10
  - Enter Time on Timesheet Screen (Quick Entry) ..... 11
  - Enter Time on Edit Line Screen (Detailed Entry) ..... 11
  - Add a Timesheet Line ..... 11
  - Copy a Timesheet Line ..... 12
  - Delete a Timesheet Line (for iOS)..... 12
  - Delete a Timesheet (for Android and Windows) ..... 13
  - Select a Labor Code for a Line ..... 13
  - Select a Labor Category for a Line ..... 14

Select a Payroll Tax Locale for a Line.....	14
Enter a Start/End Time for a Line.....	14
Enter a Meal Start/End Time for a Line.....	14
Create a Favorite.....	15
Delete a Favorite.....	15
Add a Comment to a Timesheet.....	15
Use a Historic/Global Comment.....	16
Delete a Comment from a Timesheet.....	16
View Timesheet Summary.....	16
Enter Unit on Timesheet Units (Quick Entry).....	16
Enter Units on Edit Unit (Detailed Entry).....	17
Add a Unit Line.....	17
Add a Description to a Unit.....	18
Delete a Description from a Unit.....	18
Copy a Unit Line.....	18
Delete a Unit.....	19
View Unit Summary.....	19
Submit a Timesheet.....	19
Reopen a Timesheet.....	20
Expense Report.....	21
View the Expense Report List.....	21
View Expense Report Details.....	21
Adding an Expense Report.....	21
Add an Expense Line.....	22
Edit an Expense Line.....	22
Copy an Expense Line.....	22
Delete an Expense Report.....	23
Delete an Expense Line.....	23
Searching for an Account.....	23
Select Default Currency and Exchange Rate.....	23
Selecting a Tax Code.....	24
Attaching a Receipt.....	24
Submit an Expense Report.....	25
Reopen an Expense Report.....	26
Settings.....	27
Set a Default View.....	27
Enable PIN.....	27

Disable PIN ..... 27

Reset PIN ..... 27

Modify Server URL ..... 28

Set the Number of Displayed Search Results..... 28

Enable/Disable Usage Tracking ..... 28

Configure Touch Time & Expense Settings ..... 28

## Overview

Deltek Touch Time & Expense for Vision is a time-tracking tool that allows you to enter, update, submit, and view timesheet data and expense reports from anywhere at any time using your touch screen device and synchronize that data to the Vision database.

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

In addition, the application name in *Google Play*, *Apple App Store*, and *Windows Store* displays *Deltek Touch T & E for Vision*.

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

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To use the full functionality of Touch Time & Expense, you must be on the latest Touch server and Vision. You can use the application with lower versions of Vision and Touch server, but new features will not be available. Touch server must be installed and configured using the guidelines in the *Deltek Touch Time & Expense for Vision Technical Installation Guide*.

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## Mobile Device Requirements

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

- Apple iOS 7 and higher
- Android 4.x and higher
- Windows Phone 8.1 and higher

## If You Need Assistance

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

### Customer Services

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

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



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

### Customer Care Connect Site

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

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

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



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

## Access Customer Care Connect

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

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



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

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

## Additional Documentation

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

Document Name	Description
Deltek Touch Time & Expense for Vision Installation Guide	This document provides instructions for the installation and configuration of application.
Deltek Touch Time & Expense for Vision Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.



## Getting Started

### Install Touch Time & Expense

1. In *Google Play*, *Apple App Store*, or *Windows Store*, search for the application (*Deltek Touch T & E for Vision*).
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application, then follow the screen prompts to accept the terms of agreement and usage tracking.



Touch Time & Expense 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 Touch Time & Expense:

- Touch server must be installed by your administrator in order to use the Touch Time & Expense application.
- During setup, the administrator creates a Touch server URL, which is different than your normal Vision URL that you access through a PC.
- The Touch server URL uses the format <https://<server>/deltektouch/vision/time/> by default, where **<server>** refers to the host name of your Touch Server. The default URL can be changed to something else by your Vision administrator.
- 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.



If **Revision Auditing** has been enabled for your account in Vision core, you cannot use Timesheet, only Expenses.

### Log On to Touch Time & Expense

1. Tap *Deltek T&E*.
2. In your initial login, the application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.



When usage tracking is enabled, the application tracks the number of times you access the application and how often you use certain features. Touch Time & Expense does not track any personal or confidential data, such as user name, projects, and clients.

3. Enter your organization's Touch server URL using a format that your administrator provides. For example, <https://<server>/deltektouch/vision/time/>.



For more information about establishing connection to Touch Time & Expense, click **Connection Help**.

4. Tap **Connect**.
5. Tap the **User ID** and **Password** fields to enter corresponding values.

6. Tap the **Database** field, then scroll through the list.
7. Tap a database, then tap **Done**.



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

8. Tap **Log In**. For initial login, you can either create a PIN or skip PIN creation. For more information, see [Security PIN](#).



Touch Time & Expense remembers your user ID and selected database (and domain if Windows Authentication is being used) on your next login. To log in using a different user ID and database, tap **Forget Me on this Device** on **Settings**. All your user settings and favorites will be lost.

## Security PIN

For initial login, Touch Time & Expense allows you to either create a PIN or skip PIN creation.

- To create a PIN, enter a four-digit PIN, then re-enter it to confirm. Instead of entering your password on your next login, you need to enter your PIN.
- To skip PIN creation, tap **Skip PIN Setup**. You have to enter your password each time you log in to the application.





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

When using domain credentials, the **Skip PIN Setup** button does not display.

## Log Out of Touch Time & Expense

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

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



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**.

## Closing Touch Time & Expense

If you close Touch Time & Expense completely either from the task bar or by turning off the device, any unsaved changes are lost.

## Switching Between Screens in Touch Time & Expense

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

- Open a different timesheet.
- Tap , then 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, Touch Time & Expense 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.




Changes are only saved in memory with the packaged application 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 (Touch Time & Expense 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 Touch Time & Expense user interface has the following screens, which you can navigate easily by tapping .




If **Timesheet Auditing** has been enabled for your account in Vision core, you cannot use features related to **Timesheet** in Touch Time & Expense, only **Expenses**. In this case, logging on to Touch Time & Expense for the first time would display a message, which prompts you to tap **OK**. The **Timesheet** item from the sliding menu and the **Open In, Auto-Copy Timesheet Upon Submit**, and **Display Non-Working Days** fields on the **Settings** screen do not display.

### 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 .



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 Vision database.



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 you have selected the **Enable unit quantities feature** option in the Company Timesheet Configuration 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 or the summary of the units on your timesheet.

## 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.



Touch Time & Expense reconciles any changes that you make to Expense Reports that use credit card charges against the amount specified in the Credit Card pane of Vision core.

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## 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.

## Settings



This screen helps you configure the Touch Time & Expense settings according to your preferences.

## Help

Tap , then 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.



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 .

## 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  then 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  then 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**.



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, **Touch Time & Expense** 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.



Timesheets no longer display in the list once they are approved.

- **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.

- **New Timesheet** – These timesheets prompt you to copy the previous timesheet before you enter data. These timesheets display in blue highlight.

You are only prompted if the previous timesheet is still on the device. If the previous timesheet has been approved, it is no longer available for copying.

## Editing a Timesheet




Touch Time & Expense 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 Touch Time & Expense can save the updated timesheet line to the Vision.



The save button is available on the **Timesheet** and **Expense Report** screens.

- You can update several timesheet lines and save after you make all changes.
- If you tap  and there are unsaved changes, Touch Time & Expense saves your changes automatically.
  - If a signature is required, Touch Time & Expense prompts you for your PIN or password.
  - If a signature is not required, Touch Time & Expense 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**, Touch Time & Expense 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, Touch Time & Expense 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, Touch Time & Expense returns you to the **Edit Line** screen with the error listed at the top.


## Enter Time on Timesheet Screen (Quick Entry)

Touch Time & Expense 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 the **Edit Line** screen.

1. Swipe the calendar to select a date, or tap the date.
2. Tap the hour field of a selected line.
3. Scroll through the time picker 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.
4. Tap **Done**.
5. Tap .

## Enter Time on Edit Line Screen (Detailed Entry)

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, then enter or tap the appropriate values.
6. Tap **Done**.
7. 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. Filter projects by tapping **All** or **Favorites**, or entering part of a name, number, or client in the search field. Touch Time & Expense 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 Vision.
  - If this project has phases and/or tasks, you need to select the phase and/or task.
5. Depending on your configuration, most details of the line will be defaulted for you. Make any changes to this line as appropriate, including adding hours, then tap **Done**.
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 the **Settings** screen.



When editing a line, you can tap the **Phase** or **Task** field on the **Edit Line** screen 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. Take one of the following actions:
  - Touch and hold the line until **Copy Line** displays, then tap it.
  - Tap the timesheet line to display the **Edit Line** screen, then tap **Copy Timesheet Line**.

## Copying an Entire Timesheet

You can 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 (has not yet been approved).
- 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**.



- You cannot copy a special category line, such as Vacation, Sick Leave, and Holiday. The administrator determines the special categories in Timesheet Configuration – they vary from database to database and even from user to user.
- Copying a timesheet line does not copy the hours, including the **Start Time** and **End Time**.

## Delete a Timesheet Line (for iOS)

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), then tap **Delete**.
- Tap the line to display the **Edit Line** screen, then tap **Remove from Timesheet**.

Touch Time & Expense then asks you whether you would like **Delete Entire Project** or **Delete Time on this Day Only**.

## Delete a Timesheet (for Android and Windows)

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), then 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, then tap **Remove from Timesheet**. Touch Time & Expense asks you whether you would like **Delete Entire Project** or **Delete Time on this Day Only**.

## Select a Labor Code for a Line

Touch Time & Expense 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 Vision core.

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



- When the project that you are updating is set to **Warning** in Vision core, the **Filter Budgeted Levels** toggle switch is editable in Touch Time & Expense.
- When the project that you are updating is set to **Error** in Vision core, the toggle switch is set to **ON** by default and the list only displays budgeted labor codes in Touch Time & Expense.
- When the **Budget Source** budget validation is set to **Project Planning** and **Budgeted Level** is set to **Employee Only** in Vision core, the toggle switch does not display in Touch Time & Expense.
- 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, then 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 Vision core.

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, then tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Payroll Tax Locale** field.
5. Scroll through the list, then tap the appropriate value.
6. Tap **Done**.
7. If you are done editing the other fields, tap **Done**.

## Enter a Start/End Time for a Line

The **Start Time/End Time** only displays in Touch Time & Expense when the corresponding fields are enabled in Vision core. If there is an overlapping time, Touch Time & Expense does not allow you to save the 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, then 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**.

## Enter a Meal Start/End Time for a Line


The **Meal Start Time/End Time** and **Number of Breaks** only display in Touch Time & Expense when the corresponding fields are enabled in Vision core. If there is an overlapping time, Touch Time & Expense does not allow you to save the timesheet.

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, then tap any line on the timesheet.
4. On **Edit Line**, tap the either the **Meal Start Time** or **Meal End Time** fields to select corresponding values from the list, then 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**.

## 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 Vision.
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



Touch Time & Expense 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, then tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. Enter your comments, then tap **Done**.
6. If you are done editing the other fields, tap **Done**.
7. Tap .



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, then tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. Tap .
6. Scroll through the **History/Global** list, then tap a comment.
7. Use or edit the selected comment, then tap **Done**.
8. Tap .




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, then 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.

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 , then tap **View Summary**.
4. Tap **Day** or **Project** to view the summarized information by day or project.

## 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 , then tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, then tap the unit field of a selected line.
5. Tap the number of units, then enter a number in the field.
6. 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 Vision core, Touch Time & Expense 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 , then tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, then tap anywhere in a selected line except the unit field.
5. On **Edit Unit**, tap the field that you want to update, then enter or tap the appropriate values.
6. Tap **Done**.
7. 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 , then 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. Touch Time & Expense 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 Vision.
  - If this project has phases and/or tasks, you need to select the phase and/or task.
6. Tap a project, then tap **Done**.
7. On **Add Project**, make any changes to this line as appropriate, including selecting unit table and adding unit, then tap **Done**.
8. Tap .



if you add a line to the **Timesheet Units** screen, Touch Time & Expense does not add it automatically to the **Timesheet Hours** screen. If you add time to a line on the **Timesheet Hours** screen, however, Touch Time & Expense adds the updated line automatically to the list on the **Timesheet Units** screen.




## Add a Description to a Unit

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




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 , then tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, then 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 , then tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.

4. Scroll through the list, then perform one of the following actions:
  - Touch and hold the line until **Copy Unit** displays, then tap it.
  - Tap the unit line to display the **Edit Unit** screen, then 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 , then tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, then perform one of the following actions:
  - Swipe across the selected line in either direction (left-to-right or right-to-left), then 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, then tap **Remove from Timesheet**. Touch Time & Expense 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.





The **Units** button only becomes available if units are enabled in Vision core.

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





## 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 , then tap **View Summary** to ensure that you have entered all of your time for this period.
3. Tap , then tap **Yes** to confirm.








- If you need to sign the timesheet, Touch Time & Expense 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**, Touch Time & Expense 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, then tap .



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


## 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 Touch Time & Expense.




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

### View the Expense Report List

1. Tap , then 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 , then 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 , then tap **Expense Report**.
2. On **Expense Report**, tap .
3. On **New Report**, enter or select necessary details, then tap **Done**.
4. On **Expense Report**, make any changes to this report as appropriate, including adding expenses. Depending on your configuration, 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 , then 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  then 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 configuration, certain details are defaulted for you.
5. Tap .


## Add an Expense Line

1. Tap , then 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**.



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


## Edit an Expense Line

1. Tap , then 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**.



You can also add a project and/or phases/tasks for the expense sheet line. For more information, see the *Selecting Phases and Tasks* section in this document.



## Copy an Expense Line

1. Tap , then 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, then 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, then tap **Done**.




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

## Delete an Expense Line

1. Tap , then 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

Touch Time & Expense 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 Vision core.

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 Vision core. 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 **Configuration** in Vision core) 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 Vision core. Only tax codes that have **Employee Expenses** selected in the **Inputs** section are available for an expense line.



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

### 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, then tap the appropriate tax code, then tap **Done**.
5. In **Tax Amount**, enter a value.
6. Tap **Done**.



### Edit a Tax Code on an Expense Line

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

## Attaching a Receipt

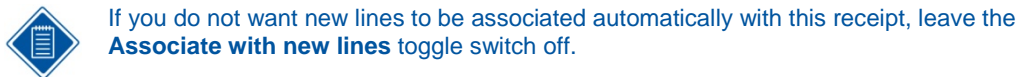
You can attach a receipt by tapping  to take a picture of the receipt or tapping  to select it from the camera gallery.

## 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, then tap .
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. Tap **Done**.



## Select an Existing Picture from Camera Gallery


1. On **Edit Line**, tap .
2. On **Picture**, tap either  or , then 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 , then tap **Yes** to confirm.



- If you need to sign the expense report, Touch Time & Expense 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 a submitted expense report if you have rights to do so.

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, then tap .

## Settings


### Set a Default View

Depending on your settings, Touch Time & Expense opens either on the **Timesheet Periods**, **Current Timesheet**, or **Expense** screen.

1. Tap , then tap **Settings**.
2. In **Open In**, tap the field.
3. Tap a view.


### Enable PIN

To make accessing Touch Time & Expense easier on your next login, you can use a four-digit security PIN instead of your user name and password.

1. Tap , then tap **Settings**.
2. In **Use PIN**, slide the toggle switch to **ON**.
3. Enter your password, tap **OK**.
4. Enter your PIN, then reenter it to confirm.


### Disable PIN

Disabling your security PIN requires you to enter your password each time you access the Touch Time & Expense. If you use Windows Authentication, this option is not available.

1. Tap , then **Settings**.
2. In **Use PIN**, slide the toggle switch to **OFF**.



### Reset PIN

Resetting your PIN requires you to log in again using your user name and password.

1. Tap , then **Settings**.
2. Tap **Log Out**.
3. Tap **Reset PIN**.
4. Tap **OK**.
5. Tap the **User ID** and **Password** fields to enter corresponding values.
6. Enter your PIN, then reenter it to confirm.



## Modify Server URL


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



**Known Issue:** If you try to copy the value of the **Server URL** field by touching and holding the field and then tapping **Select All** and **Copy** buttons, Touch Time & Expense would suddenly close.

## Set the Number of Displayed Search Results

This task allows you to control the number of project records that Touch Time & Expense 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 , then tap **Settings**.
2. Tap in the **Search Result Display By** field.
3. Scroll through the list to select a value.
4. Tap the value, then tap **Done**.

## Enable/Disable Usage Tracking


Usage tracking keeps a record of the number of times you accessed Touch Time & Expense and the features that you used.




Usage tracking keeps a record of the number of times Touch Touch & Expense is accessed and the features used for research purposes. This information is used to help determine product direction.

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

## Configure Touch Time & Expense Settings

1. Tap , then tap **Settings**.
2. You can modify the following:
  - **User ID** – To change the current user, tap **Forget Me on this Device**, then 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.
  - **Use PIN** – Slide to turn on or off. Setting it to **ON** will require you to enter a 4 digit PIN instead of your Vision password on your next login. If you use Windows Authentication, you cannot turn this off.

- **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 Touch Time & Expense (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 Touch Time & Expense 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 or **Use Keypad** to use the standard device keypad when entering numbers in time and currency fields.
- **Help** – Tap to access the Touch Time & Expense help. You can also access **Help** by tapping , then 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
  - Touch 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.

- **Log Out** – When you close Touch Time & Expense 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 , then 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.
- 



**Known Issue:** *This issue is a known limitation of the operating system.* When you close Touch Time & Expense by pressing the **Home** button of your device and return to the application by tapping it from the application list, it would not display the previous screen that you accessed. It would open either on the Login screen or the PIN screen (if you are using PIN instead of a password). As a workaround, Deltek recommends tapping **Done** after the installation or (if you tapped **Open** instead of **Done**) clearing Touch Time & Expense data on the device.

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