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Deltek Vision® Mobile Timesheet

User Guide

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Contents

Overview

About Vision Mobile Timesheet

Vision Time is a time-tracking tool that allows you to enter your own timesheets and submit them for processing. Vision Mobile Timesheet works with directly with Vision Time so that you can enter timesheet data from your mobile device. The two applications follow similar formats and use the same project, phase, task, and labor code structure to ensure seamless time tracking.

Vision Mobile Timesheets uses your Vision access rights to control the actions that you can perform within the application.

Depending on your access rights, you can enter:

- Project, phase, and task work breakdown values for each labor charge on your timesheet
- Time, using special categories with pre-defined work breakdown structure values
- Any combination of regular hours and overtime hours for each day in a labor period
- Comments for each labor charge on your timesheet

When recording hours worked, you can:

- Enter or edit timesheet data for an open labor period at any time during the period
- Add any number of lines to record hours worked
- Submit your timesheet to a designated administrator for approval when the labor period ends

Adding Custom Notes to This Guide

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

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

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

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

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

If You Need Assistance

If you need assistance installing, implementing, or using Vision Mobile Timesheets, 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 Vision Mobile Timwsheet Administrator.

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

Before You Begin

Before you begin using the Vision Mobile Timesheet application, it is important that you review the following information.

System Requirements

The requirements are as follows:

- Vision Mobile Timesheet requires that Vision is accessible to your mobile device either over the Internet or via a private network to which your device is connected. See the Deltek Knowledge Base for additional information.
- Vision Mobile Timesheet supports communication with the Vision server via HTTP or HTTPS.

> Deltek recommends the use of HTTPS protocol when transmitting data over the Internet. HTTPS encrypts the data in transit.

- Vision Mobile Timesheet requires Vision 6.2 SP1 or later (with most recent hotfix).
- Vision Mobile Timesheet allows you to use your Vision login credentials to connect the application to Vision and fully supports the use of Windows Authentication.

Mobile Device Requirements

The Vision Moblie Timesheet application runs on the Apple internet operating system devices that run on iOS version 4.x or later.

Data Updates

When you use Vision Mobile Timesheet, data automatically transfers to Vision whenever you:

- Open a timehseet
- Change a timesheet line (add, edit, or delete)
- Submit or refresh data
- Bring the app to the foreground
- Log back in after the screen times out

The status of the update process displays in the footer of the Mobile Timesheet screen:

- Updating
- Last updated [date and time]

Data Conflicts

If changes are made to your timesheet in Vision Time while you are logged in to Vision Mobile Timesheet, a data conflict occurs. The information in Vision overwrites the data in Vision Mobile Timesheet.

Vision Mobile Timesheet data refreshes each time you update the timesheet or bring it back to the foreground. You must force a data transfer by clicking the **Refresh** button if you are offline and come back online. The device transfers data to and from Vision. The **Waiting** symbol displays until the transfer is complete. See *Data Transfer* on page 28 for more information.

Work Breakdown Structure Naming Conventions

In Vision, the different levels of a project are collectively referred to as the Work Breakdown Structure (WBS). As shown in the following table, the elements of the WBS are mapped to levels of a project plan. The system defaults are:

WBS Element	Plan Level
Project	1
Phase	2
Task	3
Labor Code	4

The structure of your WBS elements is automatically applied from Vision to your timesheets in Vision Mobile Timesheet. The names of the elements, however, may differ from project, phase, task, and labor code which are used in this guide. Contact your Vision Mobile Timesheet administrator for information about your organization's WBS element naming conventions.

What is Not Supported?

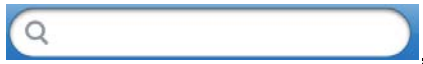
The following features are not supported in Vision Mobile Timesheet:

- Automatically populate timesheets with resource planning assignments
- Units
- Payroll tax locale
- Start/end times
- Opening another user's timesheet
- Approving a timesheet
- Extended data validation business logic for Timesheets via Web Services
- Viewing or copying approved timesheets.
- Timesheets outside of ninety days of the current date

Install Vision Mobile Timesheet

Install the Vision Mobile Timesheet application from the Apple® App Store.

To install the app from the App Store, complete the following steps:

1. Open the App Store.
2. In the **Search** field , enter **Deltek.**
3. Tap **Search**.
4. Tap **Deltek Vision Mobile Timesheet** and review the download information.
5. Tap **Free** to begin the download process.
6. Follow the screen prompts to accept the terms of agreement and usage tracking.

   When the installation is complete, the 

   Deltek Vision Mobile Timesheet icon displays on your mobile device.

Initial Log In

To log in to Vision Mobile Timesheet, complete the following steps:

1. Select the Vision Mobile timesheet app.
2. Follow the screen prompts to accept the terms of agreement and usage tracking.

> You can Tap the button at any time during this process to access the Vision Mobile Timesheet User Guide and Settings information. Contact your system administrator to determine configuration requirements.

3. Enter your organization's Vision Server URL in the following format: http://servername/vision where vision is the irtual directory for your Vision instance. Vision is the default virtual directory name in most implementations. Tap **Connect**. The Login screen displays.
4. If you use Windows Authentication, select the **User Authentication** option the first time that you log in to Vision Mobile Timseheet, to use your Windows credentials. See *Log In With Windows Authentication* on page 7 for more information.
5. Tap in the **Database** field and select the database that you want to use. A check mark displays by the selected database.
6. Tap in the **Username** field and enter your username.
7. Tap in the **Password** field and enter your Vision password. The option to create a 4-digit security PIN displays. You can protect Vision Mobile Timesheet by creating a 4-digit PIN, which you use instead of a password. A shorter security PIN makes it easier to access the timesheets on your mobile device.
8. Complete one of the following actions:
   - To create a PIN, enter a 4-digit number and then re-enter it to confirm the number.
   - To skip PIN creation, tap **Skip PIN Protection**.

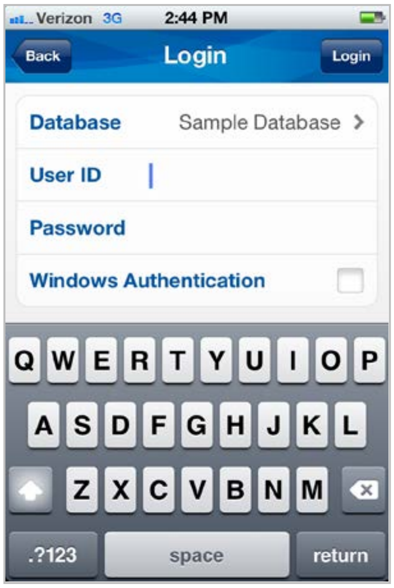
See *Use a Security PIN* on page 8 for more information.

Windows Authentication

Vision Mobile Timesheet includes an option for **Windows Authentication**, which allows you to log in one time for both Windows and Vision Mobile Timesheet. After initial configuration, if you create a PIN, you can use the PIN to access Vision Mobile Timesheet.

To log in with your Windows credentials, complete the following steps:

1. Tap in the **User ID** field and enter your Windows User ID.
2. Tap in the **Password** field and enter your Windows password. For security purposes, the password is encrypted as you enter it in this field.
3. Tap in the **Domain** field and enter your domain.
4. Tap **Login**.



5. On the Vision Mobile Timesheet Login screen, tap in the **Database** field and select the database.
6. Tap in the **User ID** field and re-enter your Windows User ID.
7. Tap in the **Password** field and re-enter your Windows password.
8. Tap the **Windows Authentication** option to confirm the Windows authentication login.
9. Tap **Login**. The Timesheets screen displays.

Password Changes or Expires

If your Vision password or network password that is used with Windows Authentication changes or expires, you must enter your new password the next time that you access the mobile timesheet application.

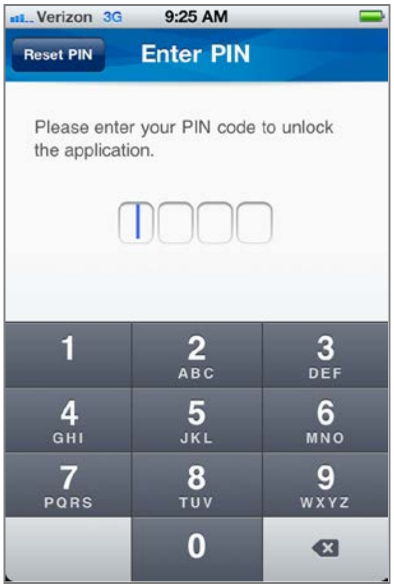
Vision Mobile Timesheet is not capable of resetting your Vision or network password.

Use a Security PIN

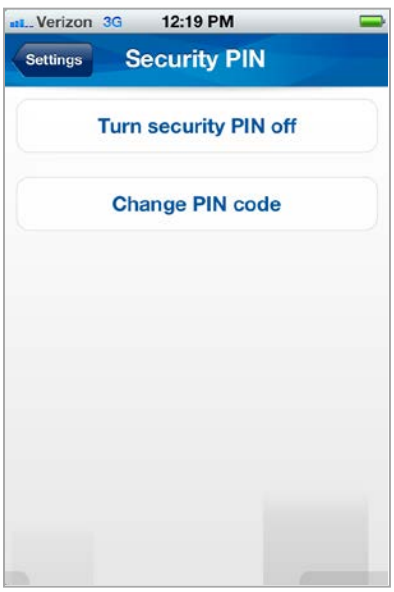
Because Vision passwords are often lengthy and complex, you can make it easier to access timesheets on your mobile device by opting to use a 4-digit security pin. This screen displays whenever you open the application again after it times out or after you close it.

To configure or change your security PIN, complete the following steps:

1. Tap **Settings** and then tap **Security PIN**.



2. If a Security PIN is enabled, you must enter the **PIN**. After you enter the PIN, the Security PIN screen displays.



3. Complete one of the following actions:
   - Tap **Turn security PIN on** to turn on the security PIN. Enter the four-digit PIN code and re-enter to confirm.
   - Tap **Turn security PIN off** to turn off the security PIN. Enter the four-digit PIN code to disable the security PIN requirement.
   - Tap **Change PIN code** to reset the security PIN. Enter a unique four-digit PIN code, and keep track of this code as you will use it each time you access Vision Mobile Timesheet.
4. Tap **Settings** to return to the Settings screen.

If you disable the PIN, you must enter your Vision password each time that you open Vision Mobile Timesheet.

Open a Timesheet

You can open your own timesheet at any time. However, your access rights to Vision and the status of the selected timesheet and time period determine which processing options are available to you.

- **Timesheet Status** — The status settings for mobile timesheets are as follows:
  - **In Progress** timesheets are not yet submitted and allow you to enter data. These timesheets display in green highlight.
  - **Submitted** timesheets that have not been approved display in the list. If your access rights allow you to resubmit, you can reopen it and resubmit. See *Mobile Timesheet Settings* on page 34 for more information. These timesheets display in gray highlight.
  - **New** timesheets prompt you to copy the previous timesheet before you enter data. These timesheets display in blue highlight.
  - **Unable to Save** timesheets display in red highlight and contain errors. You must correct the errors before the timesheet can be saved to Vision. See *Timesheet Notifications* on page 26 for more information.
- **Timesheet Period option** — If **Default to Timesheet** is selected in Settings, Vision Mobile Timesheet opens your timesheet for the current period. See *Mobile Timesheet Settings* on page 34 for more information.

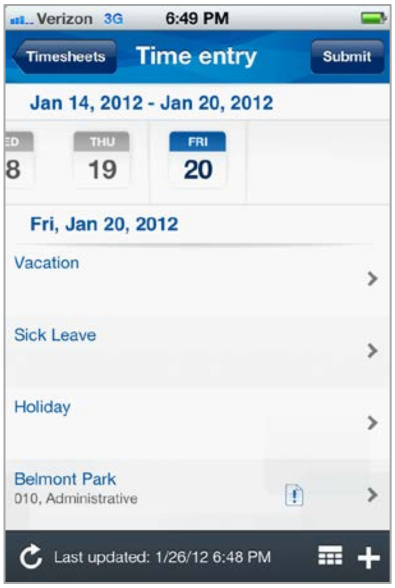
To open a timesheet after you log in, complete the following steps:

1. Tap the timesheet period that you want to open. Only timesheets within ninety days of the current date are available.

   If **Default to Timesheet** is selected in Settings, Vision Mobile Timesheet opens your timesheet for the current period. See *Mobile Timesheet Settings* on page 34 for more information.

   The Time entry screen displays.



2. Scroll through the day icons and select the date. As you scroll, the date that displays in the center of the scroll is the active date. The border around the date is color-coded to indicate the type of date as follows:
   - **Weekend days** — green border
   - **Holidays** — aqua border
   - **Workdays** — blue border

   The details for the specific date display in the lower portion of the screen.

You can tap the **Timesheets** button to view a list of all timesheets.

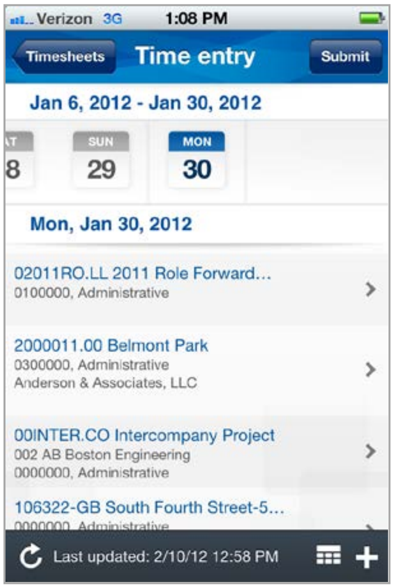
3. Complete one of the following actions:
   - Enter time on an existing timesheet line (see page 13 for more information).
   - Enter a new timesheet line (see page 17 for more information).

Enter Time on an Existing Timesheet Line

Existing timesheet lines allow quick entry of time information. You can open the timesheet line and make changes as needed. Refer to the timesheet status listing on page 11 for details on the types of timesheets that display.

To enter time for an existing timesheet line, complete the following steps:

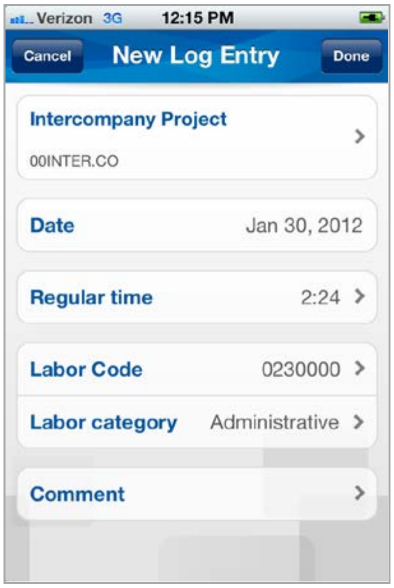
1. Tap the timesheet line for which you want to enter time. In this example, the line is Intercompany Project.



   The Log Entry screen displays for the selected line. This displays the project, phase, and task. If there is more than one level in your work breakdown structure, an arrow displays next to the top level name. In this example, Intercompany Project has additional levels.

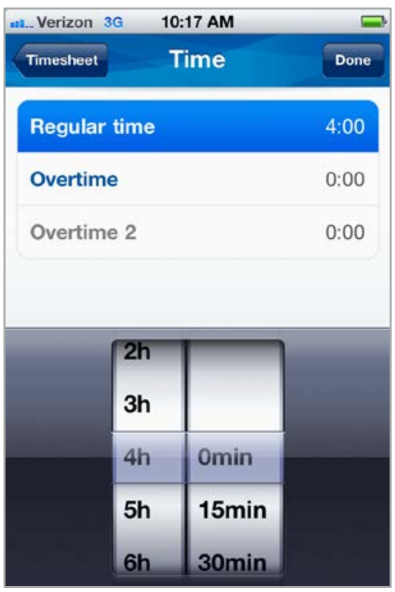
2. Tap the arrow to change the phase or task. You cannot change the project after the line has been saved.

> In Vision Mobile Timesheet, the structure of your WBS elements is automatically applied from Vision to your timesheets. The names of the elements may differ from project, phase, task, and labor code which are used in this guide. Contact your Vision Mobile Timesheet administrator for information a your organization's WBS element naming conventions.



3. Tap the line for each category of time that you need to enter. The possible categories are **Regular**, **Overtime**, and **Overtime 2.**

   The same screen displays each time that you tap any of the time categories.



4. Select the amount of time for each time category and tap **Done**. The Log Entry screen displays.

   If the Labor Codes are enabled, the **Labor Code** field defaults with your labor code.

5. Tap the **Labor Code** line to change it. Scroll through the list to select a labor code for each level that displays.

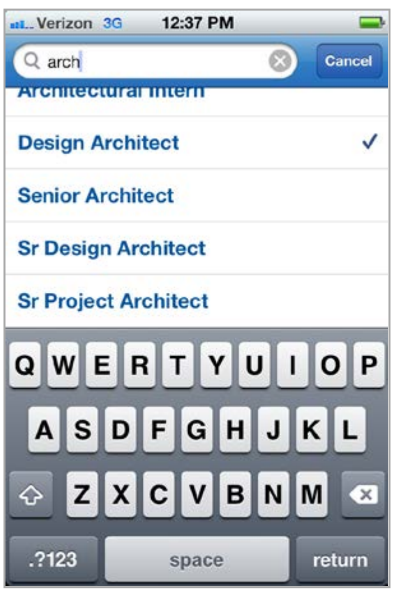
Depending on your Vision settings, the labor code or labor code description displays on your timesheet.

6. Tap **Done**. The Log Entry screen displays.

   If Labor Categories are enabled, the **Labor Category** field defaults with your labor category.

7. Tap the **Labor Category** line to change it. Scroll through the list to select a labor category for each level that displaysfd

8. Select a category or use the **Search** field to filter the labor category list.

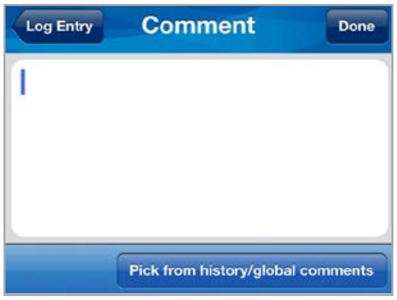


   As you type the labor category name, Vision Mobile Timesheet filters the list for any labor categories that contains the text entered.

9. Tap the **Comment** field to enter comments and then tap **Done**. The Log Entry screen displays.

10. Tap **Done**. The timesheet information is saved. If comments are required for this project and are not yet entered, the Comment screen displays.

11. Enter a comment or tap **Pick from history/global comments** to select a comment from the list. This list includes all comments used in this timesheet and all global comments created by your administrator in Timesheet Company Configuration.

    There are two indicators that can display on timesheet lines:

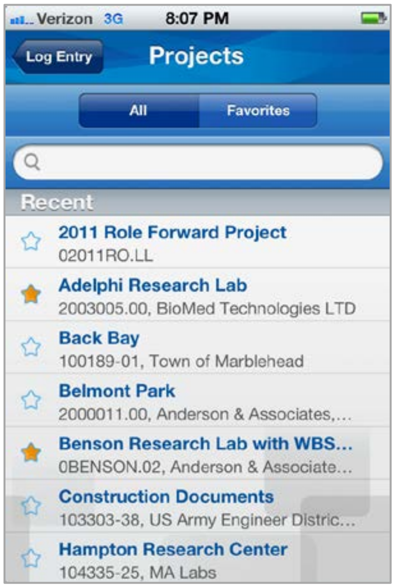
    -  indicates that comments are required and are missing for the timesheet line.
    -  indicates that comments were entered for the timesheet line.

12. Tap **Done** to save your comment and return to the Log Entry screen.
13. Tap **Done** to save your entries.

Enter a New Timesheet Line

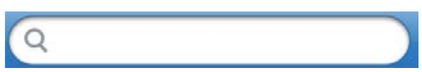
To enter a new timesheet line, complete the following steps:

1. Tap the **+** icon in the lower right corner to enter a new line. The top level of your work breakdown structure displays. In this example, the label is **Projects**; this label may be different, depending on your organization's naming conventions.

   The information that displays is available in two different views: **All** or **Favorites**.

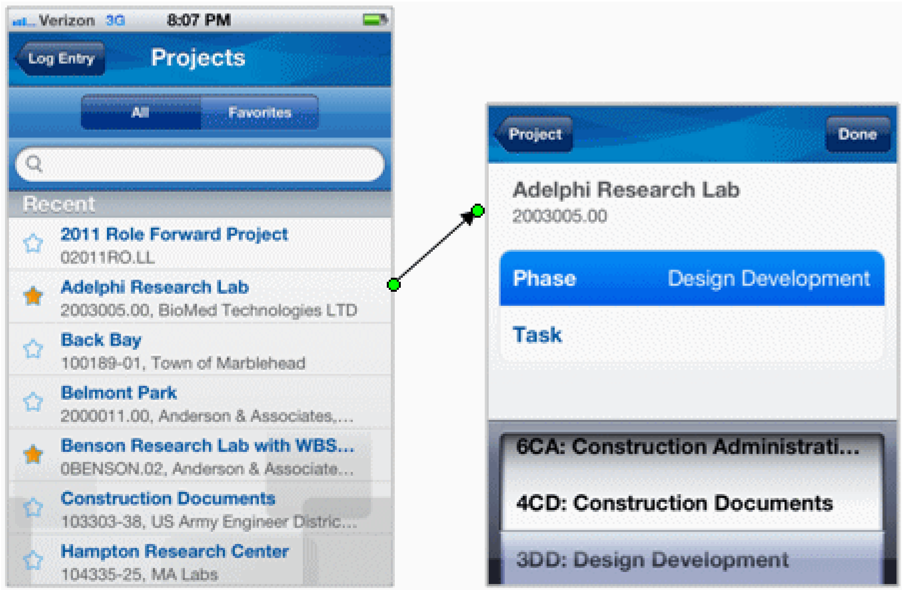
2. Complete one of the following actions:
   - Tap **All** to view a list of all projects.
   - Tap **Favorites** to see favorite projects, and then scroll through the list to select one.
   - Use the  **Search** field to filter the project list for either **All** or **Favorites.** As you type, Vision Mobile Timesheet filters the list for any projects that have a number, name, or client that contains the text entered. If the project is not in the list, it has not been used recently or it is not one of your favorites.

     After you enter a minimum of three characters in the Search field, tap **Continue search on server…** to search the Vision database for the project name, project number, and primary client name.

3. Tap the project to select it.

4. Tap **Done**. If there are additional WBS levels associated with the top level, you are prompted to select them from a list. In this example, the levels are **Phase** and **Task**.

   After a line has been saved, you cannot change the top-level project. However, you can change the phase and task selected.



5. Select the phase and task information.
6. Tap **Project** to return to the list of projects, or tap **Done** to save your entries and return to the Log Entry screen.
7. Tap the project to select it.
8. Tap the line for the category of time that you need to enter. The possible categories are **Regular**, **Overtime**, and **Overtime 2**.

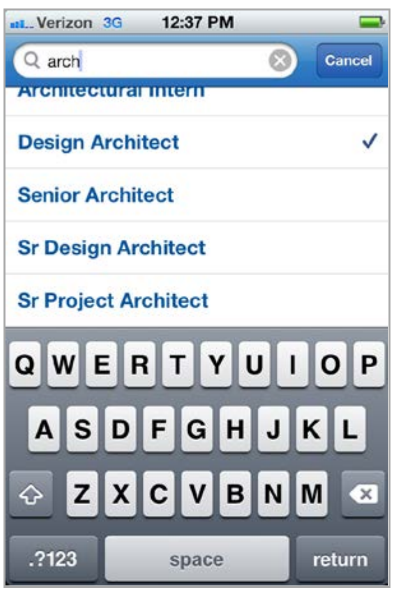
   The Time screen displays.

9. Select the time for each category and tap **Done** to return to the Log Entry screen.

   If the Labor Codes are enabled, the **Labor Code** field defaults with your labor code.
10. Tap the **Labor Code** line to change it. Scroll through the list to select a labor code for each level that displays.

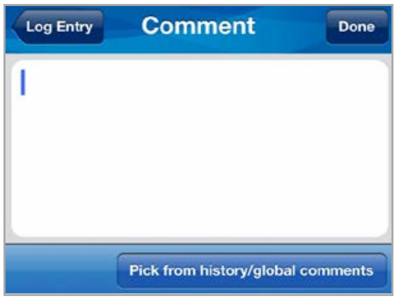
Depending on your Vision settings, the labor code or labor code description displays on your timesheet.

11. Scroll through the list, select a labor code, and then tap **Done** to return to the Log Entry screen.
12. If Labor Categories are enabled, your labor category defaults in this new line. Tap the **Labor Category** line to change it.
13. Select a category or use the **Search** field to filter the labor category list.



As you type the labor category name, Vision Mobile Timesheet filters the list for any labor categories that contains the text entered. Select the appropriate category.

14. Tap **Comment** to add comments to this line. The Log Entry screen displays.
15. Tap **Done**. The timesheet information is saved.
16. Enter your own comment, or tap **Pick from history/global comments** to select a comment from the list. This list includes all comments used in this timesheet and all global comments created by your administrator in Timesheet Company Configuration.



There are two indicators that can display on timesheet lines:

-  indicates that comments are required and are missing for the timesheet line.
-  indicates that comments were entered for the timesheet line.

17. Tap **Done** to save your comment and return to the Log Entry screen.
18. Tap **Done** to save your entries.

Delete Timesheet Data

You can delete a single timesheet line or delete a project from a timesheet.

Delete a Single Timesheet Line

To remove a timesheet line from a project, complete the following steps:

1. On the Time entry screen, scroll to select the date.
2. Select the timesheet line and tap 

Delete entry.

   One of the following occurs:

   - If this is the only day with time for this project, then the following message displays: **Do you want to delete the entire project from the timesheet or just the time for it on this day?**

     Select **Delete**, **Delete time on this day only**, or **Cancel**.

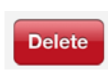
   - If more than one day has time for this project, the Delete confirmation dialog box displays.

     Click **OK**. The timesheet line is deleted. The project, and time associated with it on any other day, remains on the timesheet.

Delete a Project

To delete a project from a timesheet, complete the following steps:

1. From the Time entry screen, swipe your finger across the line that you want to delete. You can swipe in either direction.
2. Tap 

Delete for that line.

   If time has been logged against this project, a warning message displays.
3. Review the warning's details, and then tap **Delete** to confirm the deletion or **Cancel** to return to the Time entry screen without deleting the line.

Copy a Timesheet

When you create a new timesheet, you are prompted to copy the previous timesheet. This is useful for copying the timesheet's structure (projects, labor codes, and labor categories) into the new timesheet.

You cannot copy a timesheet into an existing **In Progress** timesheet.

To copy an existing timesheet, complete the following steps:

1. Tap on the timesheet in the Timesheets list. You are asked if you want to copy the previous timesheet.
2. Tap **Yes**. The timesheet opens with all of the information copied from the previous timesheet, with the exception of associated hours. You can now edit the timesheet and add time to it.

Copy a Timesheet Line

You can copy an existing timesheet line into the timesheet. This line contains the same project, labor code, and labor category, but does not have hours associated with it. You can edit the line and add time to it.

To copy an existing timesheet line, complete the following steps:

1. From the Time entry screen, long-tap on a line (keep your finger on the line for a couple seconds). A menu displays with an option to copy the line.
2. Tap 

Copy line. The line is duplicated just below the line that you copied.
3. Edit the line and add time to it.

View Timesheet Summary

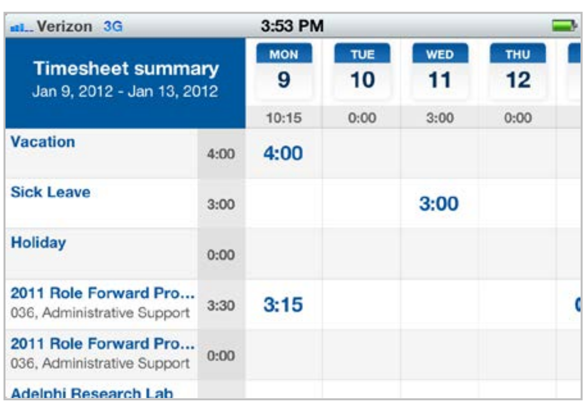
The Timesheet summary gives you an overview of each line of the timesheet.

To view a summary of the entire timesheet, tap  **Summary** on the Time entry screen. You can select an item to view on the Edit Timesheet screen.

The time for this timesheet is grouped by date. You can view this information by project. Tap **Project** to view the hours by project.

View Summary Table

While in the **Day** or **Project** summary view, you can tilt your device so that you can hold it in the landscape position. The view changes to a table that displays the time charged for each project and day.



Click a timesheet charge within the grid to view or edit its details.

Submit Timesheet Data

The way in which you submit timesheet data depends on role access rights set in Vision Security Configuration. The possible settings available in Vision Mobile Timesheet are:

- **Submit** – You can submit your timesheet only one time. After you submit the timesheet, it remains in the list for copying purposes, but you cannot make any changes to it.
- **Resubmit** – You can edit timesheet data after you submit your timesheet. Once the timesheet is approved, you can no longer re-open and resubmit it on your device. If you need to resubmit after it has been approved, you must use Vision Time.

Your system administrator can configure Vision to notify you when timesheets are due for submission or approval. These alerts display as dashboard or email alerts, depending on your settings. They do not display within Vision Mobile Timesheet. However, you can also configure reminders to give you a pop-up alert within Vision Mobile Timesheet on the day that the timesheet is due. See *Create a Reminder* on page 30 for more information.

To submit a timesheet, complete the following steps:

1. Log in to Vision Mobile Timesheet. The Timesheet Selection screen displays.

2. If **Default to Timesheet** is selected in Settings, Vision Mobile Timesheet opens your timesheet for the current period. Or, you can select the timesheet period you want to submit.

3. Review the timesheet for accuracy. You can tap the **Summary** button to view a table summary of the time by date or project. See *View Timesheet Summary* on page 23 for more information.

4. Complete one of the following actions :

   - If you are not required to sign the timesheet, tap Submit **Submit**. On the Confirm Submitting screen, tap **Yes** to submit and continue.

   - If you are required to sign the timesheet, tap Submit **Submit** and then enter your password or PIN.

Data validations are performed. If a discrepancy is found, Vision Mobile Timesheet displays a warning or an error.

5. If a warning displays, tap **Yes** to continue submitting your timesheet or tap **No** to revise and resubmit your timesheet. If an error displays, you must revise your timesheet entries and submit a second time. Contact your system administrator if the error displays again.
6. Tap **Done** to return to the main menu.

Re-open Timesheet

If your security role is allowed to resubmit data, you can edit timesheet data after it has been submitted and approved.

To re-open your timesheet, complete the following steps:

1. Select the processed timesheet from the Timesheets list, and click 

Re-open.
2. Edit the timesheet and submit it when it is complete.

Timesheet Notifications

If there is an error or warning for a line of data, a color-coded indicator displays next to the line on the Timesheet and Summary screens.

Error and Warning Indicators

The error or warning text displays at the top of the screen with an icon that indicates whether it is a warning or error. The indicators are as follows:

- **Red** — This indicates an error message for the timesheet.
- **Yellow** — This indicates a warning for the timesheet.
- **Notifications button** — Tap this button to view the Notifications screen wtih all notifications for the current timesheet. This button is only available to tap when there are errors or warnings for the timesheet. It is grayed out when there are no notifications.

There are two ways to view a notification:

- **Notifications screen** — Tap the **Notifications** button to view the Notifications screen with all notifications for the current timesheet.
- **Time Entry or Summary screen** — These screens display an indicator that there is an error or warning. Tap the line to view the errors and/or warnings for that line.

After you rectify the issue that caused the error or warning, save the timesheet. The status of the item updates and the error/warning indicators no longer display for this line.

Error Messages and Warnings

Error Messages

Errors are indicated in red on the Timesheet and Summary screens, and a status of **Cannot Update** displays. You receive a pop-up message stating that there are errors with the timesheet line and that it cannot be saved to Vision.

Refer to the following list of potential errors:

- **Budget Validation** — If a project plan or a labor code has budget validation set in Vision, and you enter time against a project or labor code that is not budgeted, a validation error displays.
- **Exceed benefit hours** — This error displays if your hours are over the number of benefit hours specified.
- **Comments required** — This error displays if your timesheet does not include comments when comments are required for this project.

Warnings

Warnings are indicated in yellow on the Timesheet and Summary screens. When there is a warning, you can still save and submit the data.

A potential warning is **Check against expected hours**, which displays if the total hours that are submitted on the timesheet exceed the total hours that you are expected to submit for the labor period. This can also be an error, depending on Company Timesheet Configuration.

Data Transfer

Vision Mobile Timesheet automatically transfers data with Vision whenever you open the application, submit data, make a change to a timesheet (add, edit, or delete a line), or you bring the application to the foreground. To keep track of the most recent data transfer, check the time stamp that displays in the footer on screen.

When Vision Mobile Timesheet data updates to Vision, the entire timesheet updates, not just a single line of data.

For example, if you enter data in Vision Mobile Timesheet but you are not connected to the Vision database, and then you update the same timesheet in Vision, a data conflict occurs. In these situations, you are notified on your mobile device that Vision has been updated and that the Vision data will overwrite the mobile timesheet data.

You can force a data transfer. This is useful when you work on a timesheet offline and need to ensure that your data transfers.

To force data transfer, complete the following steps:

1. Tap the  **Refresh** button. The device transfers data with Vision.

   The  **Waiting** symbol displays until the transfer is complete.

   If there are issues with the timesheet's data, error or warning indicators display. Use the Timesheet Notifications screen to view a list of all warnings and errors.

2. Sign or submit your timesheet.

Favorite Projects

When you search for a project, you can view projects by **All** or by **Favorites**.

To create a list of favorite projects, tap the  **Star** icon to the left of a project for which you searched. This adds the project to your list of favorites. These projects are always included in the project list without the need to search the server.

If you use the **Log Out** button on the Settings screen to log out of the application, your list of favorite projects is deleted.

Create a Reminder

The Settings menu includes a **Reminder** option that allows you to set a reminder for an **In Progress** timesheet. These reminders display as notifications on your device and are independent of the Vision Timesheet alerts.

To use reminders, complete the following steps:

1. Tap Settings.
2. On the Settings screen, tap the **Reminders** field.
3. In the **Use reminders** field, select **ON**. Vision Mobile Timesheet reminders are set to occur on the last day of the timesheet.
4. Use the time selector to specify the exact day and time time to receive the reminder.
5. Tap Settings to return to the Settings screen.

If you use the **Log Out** button on the Settings, your reminder is deleted.

To create a reminder, complete the following steps:

1. Tap Settings.
2. On the Settings screen, tap the **Reminders** field.
3. In the **Use reminders** field, select **ON**. Vision Mobile Timesheet reminders are set to occur on the last day of the timesheet.
4. Use the time selector to specify the exact time of day to receive the reminder.

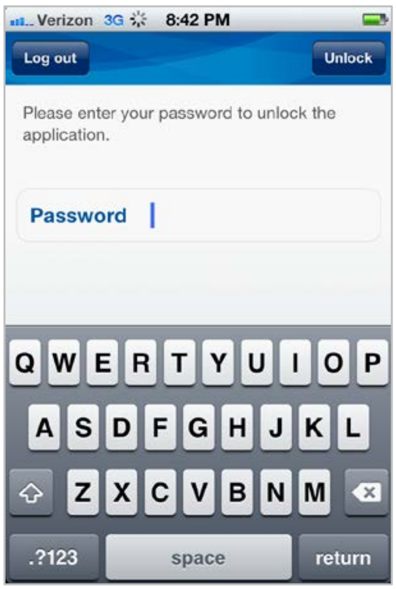
5. Tap Settings **Settings** to return to the menu.

Unlock Vision Mobile Timesheet

After a period of time in which the device has been used, or in which the device has been closed, Vision Mobile Timesheet enters sleep mode. This ensures the security of your timesheet and requires that you unlock the app to use it again.

To unlock Vision Mobile Timesheet, complete the following steps:

1. The method that you use to unlock the app depends on your configuration settings.
   - If you are using a Security PIN, enter your PIN to unlock the device.
   - If you are using a password, tap in the **Password** field and enter your password.

2. Tap the  **Unlock** button. Mobile Timesheet returns you to the last screen you were on before it timed out. The method that you use to unlock the app depends on your configuration settings.

Log Out of Mobile Timesheet

The **Log out** button is located on the Settings screen. You do not need to log out when you finish using the application because Vision Mobile Timesheet automatically locks. You can then enter your PIN or password to re-open the application.

You must log out when changes are made to any of the following:

- User ID
- Server
- Database

To log out of the application, complete the following steps:

1. Tap  Settings.
2. Tap the 

Log out button. The application closes and the following saved data is removed:
   - Favorite Projects
   - Reminders
   - User ID
   - Server
   - Database
3. To log back in, complete the steps described in the Initial Login procedure on page 7.

Configuration

Before you enter data in Vision Mobile Timesheet, you must configure the settings that dictate how your system is protected, and the types of data that you can enter and save.

Some of these settings are dependent on options in Vision. For example, if the **Require electronic signature when submitting timesheets** option is selected in Vision, then Vision Mobile Timesheet users must enter their **Password** or **PIN** as the signature before they are allowed to submit their mobile timesheets. Contact your System Administrator for additional information on Vision settings that impact the Mobile Timesheet application.

Vision Settings that Impact Mobile Timesheet

The following Vision settings impact the information that is available in Mobile Timesheet.

Timesheet

- Company Timesheet
  - Treat inactive projects/plans as dormant
  - Allow staff users to resubmit timesheets
  - Require electronic signature when submitting timesheets
  - Allow users to enter overtime
  - Require comments when hours are entered
  - Limit timesheet entry to particular hour increments
  - Left grid options
  - Check hours entered against the expected
- Timesheet Categories

Employees

- Accounting Tab
  - Hours/Day
  - Labor Category
- Time Tab
  - Default Labor Code
    - Allow Employee to change in timesheet
  - Check hours entered against expected

Projects

- Accounting Tab
  - Restrict Charge Companies (Vision Multicompany only)
- Time & Expense Tab
  - Budgeted Validation Options:
    - Budgeted Validation

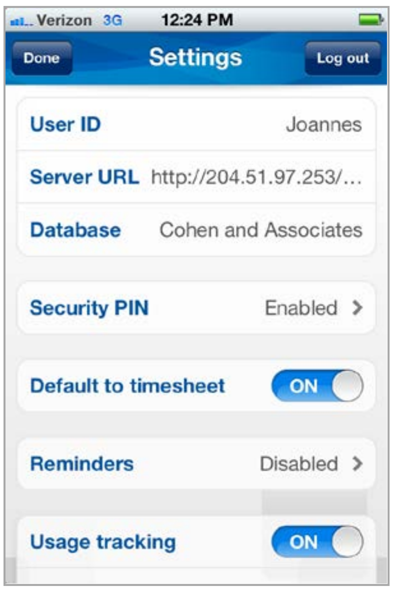
- Budgeted Source
- Budgeted Level
- Check Project Planning for Start/Finish Date
- Check Project Planning for Planned Hours
- Labor Code Levels
- Require Comments for Hours

Mobile Timesheet Settings

The Vision Mobile Timesheet settings that are available depend on the Vision settings that are listed in the previous section.

To configure Vision Mobile Timesheet settings, complete the following steps:

1. Launch the application and tap **Settings**.



2. The following options display, based on settings that you established when you logged in.
   - **User ID** — This is the ID of the current user. When you change this option, Vision Mobile Timesheet prompts you to log out of the application and then log back in to enforce your updates.
   - **Server URL** — This is the server URL that you entered when you first opened Vision Mobile Timesheet. When you change this option, Vision Mobile Timesheet prompts you to log out of the application and then log back in to enforce your updates.
   - **Database** — Enter the database in which you open your timesheet. When you change this option, Vision Mobile Timesheet prompts you to log out of the application and then log back in to enforce your updates.

3. Select from the following options to configure your mobile timesheet defaults:

   - **Security PIN** — Select from the following settings:
     - Select **Enable** to require entry of a PIN number, rather than a Vision password, to access your timesheet. This also works with User Authentication and allows you to enter your PIN to access Vision Mobile Timesheet while logged in to Windows. See *Use a Security* PIN on page 8 for more information.
     - Select **Disable** to turn off the PIN protection. When the PIN is disabled, you need to enter your Vision password each time you open Vision Mobile Timesheet.
   - **Default to timesheet** — Select **ON** to have the current period display when you open your timesheet.
   - **Reminders** — Tap the **Reminders** field and select **ON** in the **Use reminders** field to turn on reminders. These reminders display as notifications on your device and are independent of the Vision Timesheet alerts.

     Vision Mobile Timesheet reminders are set to occur on the last day of the timesheet. However, you can use the time selector to specify the exact time of day that you want to receive the reminder. Tap the **Settings** button to return to the Settings screen. If you use the **Log Out** button on the Settings screen to log out of the application, your reminder is deleted.
   - **Usage tracking** — Select **ON** to send high-level usage statistics to Deltek. These statistics include data related to the number of times the application is launched and the number of timesheets submitted. Deltek uses this information to develop the product further and to monitor application use levels. No personally identifiable or company-related information is collected or transmitted when **Usage tracking** is enabled.
   - **Help** — Select **Help** to access a link to the *Deltek Vision Mobile Timesheet User Guide* on the Customer Care site. This contains detailed information about how to configure and use Vision Mobile Timesheet. Tap the **Settings** button to return to the Settings screen.
   - **Version** — This field displays the mobile application's version number.

4. Tap **Done** to return to the Timesheets screen, or tap **Log out** to log out of the application. See *Log Out of Mobile Timesheet* on page 32 for more information.

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