



Deltek

Deltek Touch Time & Expense for Vision

User Guide

May 2019

While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published May 2019.

© Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.

Contents

Overview	1
Mobile Device Requirements	1
Getting Started	2
Install Touch Time & Expense.....	2
Set a Passcode	2
Log On to Touch Time & Expense	2
Security PIN.....	3
Access Rights	Error! Bookmark not defined.
Log Out of Touch Time & Expense	3
Change User	4
Closing Touch Time & Expense	4
Screen Display	5
Field Indicators	Error! Bookmark not defined.
Links	Error! Bookmark not defined.
User-Defined Fields.....	Error! Bookmark not defined.
Search Results	Error! Bookmark not defined.
Association Information	Error! Bookmark not defined.
Contacts	Error! Bookmark not defined.
View Contact Records	Error! Bookmark not defined.
Contact Information	Error! Bookmark not defined.
Filter Contact Records.....	Error! Bookmark not defined.
Add a Contact.....	Error! Bookmark not defined.
Edit Contact Information	Error! Bookmark not defined.
Add an Opportunity to a Contact Record	Error! Bookmark not defined.
View an Activity from a Contact Record	Error! Bookmark not defined.
Add an Activity to a Contact Record.....	Error! Bookmark not defined.
Delete a Contact Record	Error! Bookmark not defined.
Companies	Error! Bookmark not defined.
View Company Records	Error! Bookmark not defined.
Company Information	Error! Bookmark not defined.
Filter Company Records.....	Error! Bookmark not defined.
Add a Company.....	Error! Bookmark not defined.
Edit a Company Record	Error! Bookmark not defined.

Add an Opportunity to a Company Record	Error! Bookmark not defined.
View an Activity from a Company Record	Error! Bookmark not defined.
Add an Activity to a Company Record	Error! Bookmark not defined.
Delete a Company Record	Error! Bookmark not defined.
Opportunities	Error! Bookmark not defined.
View Opportunity Records	Error! Bookmark not defined.
Opportunity Information	Error! Bookmark not defined.
Filter Opportunities	Error! Bookmark not defined.
Adding an Opportunity	Error! Bookmark not defined.
Add an Opportunity on Opportunity Screen	Error! Bookmark not defined.
Edit an Opportunity	Error! Bookmark not defined.
View an Activity from an Opportunity Record	Error! Bookmark not defined.
Add an Activity to an Opportunity Record	Error! Bookmark not defined.
Delete an Opportunity	Error! Bookmark not defined.
Associations	Error! Bookmark not defined.
Associate a Record to a New Record	Error! Bookmark not defined.
Associate a Record to an Existing Record	Error! Bookmark not defined.
Edit an Association	Error! Bookmark not defined.
Remove an Association	Error! Bookmark not defined.
Calendar and Task Activities	Error! Bookmark not defined.
Recurring Activity	Error! Bookmark not defined.
View Calendar Activities	Error! Bookmark not defined.
View Tasks and Activities	Error! Bookmark not defined.
Adding an Activity	Error! Bookmark not defined.
Add a Calendar Activity	Error! Bookmark not defined.
Add a Task Activity	Error! Bookmark not defined.
Editing an Activity	Error! Bookmark not defined.
Edit a Calendar Activity	Error! Bookmark not defined.
Edit a Task Activity	Error! Bookmark not defined.
Setting a Reminder for an Activity	Error! Bookmark not defined.
Send a Message to Attendees	Error! Bookmark not defined.
Settings	Error! Bookmark not defined.
Change Search Result Sorting	Error! Bookmark not defined.
Change PIN	Error! Bookmark not defined.
Modify Server URL	Error! Bookmark not defined.
Enable/Disable Usage Tracking	Error! Bookmark not defined.

Configure Touch Time & Expense Settings	Error! Bookmark not defined.
Appendix A: If You Need Assistance	36
Customer Services	36
Deltek Support Center	36
Access Deltek Support Center	37
Additional Documentation.....	37

Overview

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

Note: 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 *Apple App Store* and *Google Play* displays *Deltek Vision Time & Expense*.

This document contains detailed information and instructions on how to use various features of Touch Time & Expense.

Attention: 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*.

Mobile Device Requirements

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

- Apple iOS 11 and higher
- Android 4.4 and higher

Getting Started

Your Touch Time & Expense administrator sends you an email message containing either the Server URL (which you can copy-paste during login) or a special link, which directs you to the appropriate app store (if Touch Time & Expense is not yet installed) or automatically populates the **Server URL** field with the corresponding URL of your company (if Touch Time & Expense is already installed).

Install Touch Time & Expense

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

Note:

- Touch Time & Expense supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.
- Touch Time & Expense does not support two-factor authentication (2FA) and multifactor authentication (MFA).
- Tap **Connection Help** on the **Server URL** screen to view information about establishing connection to Touch Time & Expense:
 - The 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 Touch Time & Expense 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 Touch Time & Expense administrator. For more information, see Deltek Knowledge Base #73672.
 - 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.

Set a Passcode

For added security, there is a setting on the Touch Server allowing your administrator to require you to use a passcode on your mobile device. If this setting is enabled, you need to set a passcode (for iOS) in your device Settings application or a lock screen (for Android) using the PIN or password method before you can use Touch Time & Expense.

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.

Note: It 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 companies.

3. If the email only contains the Touch Server URL, copy-paste it into the **Server URL** field. If the email contains the Server URL setup, then Touch Time & Expense populates the **Server URL** field automatically with the corresponding URL of your company. For example, <https://<server>/deltetouch/vision/time/>.

Attention: 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, and scroll through the list.
7. Tap a database, and tap **Done**.
8. Tap **Log In**.
9. Enter a four-digit PIN code, which you will use on your succeeding logins. For more information, see [Security PIN](#).

Note: 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 create a PIN. Enter a four-digit PIN, and re-enter it to confirm. Instead of entering your user name and password on your next login, you need to enter your PIN.

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 Touch Time & Expense Server. You then have the option to log on to Touch Time & Expense using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Touch Time & Expense server or database) requires you to use a PIN.

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 , and tap **Log Out**. If you choose to do this, Touch Time & Expense prompts you for your PIN on your next login regardless of the timeout period.
- Tap , and tap **Settings**. Tap **Log Out**.

If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**.

Change User

1. Tap **Log Out**.
2. On a PIN screen, tap **Change User**.
3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.
4. On **Log In**, enter another user ID and password.
5. Tap **Log In**.

Closing Touch Time & Expense

If you close Touch Time & Expense and re-open it from the Home Screen or Task Bar, you will be taken to the last screen that you accessed and you do not need to enter your PIN or password. If your session has timed out, you will be prompted to enter your PIN the next time the application communicates with Touch Time & Expense.

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

Switching Between Applications on the Device

If you switch between applications on the device, 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.

Note: 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 .

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

Timesheet Hours

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

Timesheet Units

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

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

The **View Units** option only becomes available if 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, summary of the units on your timesheet, or revision history.

Time Approval

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

Time Approval (List)

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

Time Approval (Detail)

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

Expense Report

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

Note: 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.

Expense Report

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

New Report

This screen allows you to add a new report.

Expense Approval

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

Expense Summary

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

Expense Details

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

Settings

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

Help

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

Field Indicators

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

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

Timesheet

View the Timesheet List

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

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 .

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

View a Timesheet

The header of the **Timesheet** screen displays the current status and total hours or units of a timesheet period. Holidays and weekends display in different colors. You can choose to hide non-working days via **Settings**.

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

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.

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

Editing a Timesheet

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.

- 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 **Timesheet**. 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 **Edit Line** 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 **Edit Line** 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).

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

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

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

Enter Time on Edit Line Screen (Detailed Entry)

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

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

6. Tap **Done**, **Done and Create New** (if you need to create another entry), or **Done and Copy** (if you need to copy the existing details to a new entry).
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, and tap **Done**.
6. Tap .

Selecting Phases and Tasks

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

The search results (including the initial list of phases or tasks) follow the **Search result display by value** that you set on the **Settings** 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, and tap it.
 - Tap the timesheet line to display the **Edit Line** screen, and tap **Copy Timesheet Line**.

Copy a Timesheet

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

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

- When you open a new timesheet, you receive an option to copy the previous timesheet if it is still on the device. If the status of the previous timesheet that you want to copy is **Approved**, **Posted**, or **Closed**, Touch Time & Expense copies all details except for the hour values and comments. Closed timesheets, however, only display if the timesheet dates are within 90 days before or after today's date.
- When you submit a timesheet, the application copies it automatically into the next timesheet if it is available (the next timesheet period has been opened by accounting) and you have enabled the **Auto-Copy Timesheets upon Submit** option on **Settings**.
- When you submit a timesheet, the application prompts you to copy it into the next timesheet if the next timesheet is available (the next timesheet period has been opened by accounting) and you have disabled **Auto-copy Timesheets upon Submit** on **Settings**.

Delete a Timesheet Line

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list of timesheet lines.
4. Take one of the following actions:
 - Swipe across the selected line in either direction (left-to-right or right-to-left), and tap **Delete**.
 - Touch and hold the selected line until options display. Tap either **Delete Entire Project** or **Delete Time on this Day Only**.
 - Tap the line to display the **Edit Line** screen, and tap **Remove from Timesheet**. 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. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.
3. Scroll through the list, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Labor Code** field.
5. To use **Filter Budgeted Levels**, toggle to limit the list to labor codes budgeted for this project.
6. Scroll through the list, and tap a labor code.
7. Tap **Done**.

Note:

- When the project that you are updating is set to Warning in 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, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Labor Category** field.
5. Scroll through the list or enter a keyword in the search field.
6. Tap a category.
7. Tap **Done**.

Select a Payroll Tax Locale for a Line

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

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

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, and tap the appropriate timesheet line.
4. On **Edit Line**, tap  in the **Regular Hours** field.
5. Tap the **Start Time** and **End Time** fields to select corresponding values from the list, which displays below the fields.
6. Tap **Done**.

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, and 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, and tap **Done**. Meal times cannot overlap times worked on projects.
5. Tap the **Number of Breaks** field to enter a value.
6. If you are done editing the other fields, tap **Done**.

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

You can use a comment that was used previously on this timesheet or a global comment by tapping . In addition, 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, and tap the appropriate timesheet line.
4. On **Edit Line**, tap the **Comments** field.
5. Enter your comments, and tap **Done**.
6. If you are done editing the other fields, tap **Done**.
7. Tap .

Use a Historic/Global Comment

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

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

Delete a Comment from a Timesheet

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

View Timesheet Summary

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

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

Enter Unit on Timesheet Units (Quick Entry)

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

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

Enter Units on Edit Unit (Detailed Entry)

If a selected project, phase, or task combination has a **Unit Table** on the **Accounting** tab in 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 , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Scroll through the list, and tap anywhere in a selected line.
5. On **Edit Unit**, tap **Units**.

6. On **Units**, filter units by entering a part of a name or number in the search field or scrolling through the list.
 - If the unit for which you are searching is in the list, tap it.
 - If the unit is not in the list, tap **Load More Units** to display the next set of search results.
7. Tap **Done**.
8. Tap .

Add a Unit Line

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

1. On **Periods**, tap a timesheet period that contains the project that you want to update.
2. Tap , and tap **View Units**.
3. On **Timesheet Units**, swipe the calendar to select a day, or tap the day.
4. Tap .
5. On **Find Project**, filter projects by tapping **All** or **Favorites**, or entering part of a name, number, or client in the search field. 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, and tap **Done**.
7. On **Add Project**, make any changes to this line as appropriate, including selecting a unit table and adding a unit, and tap **Done**.
8. Tap .

Add a Description to a Unit

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

Delete a Description from a Unit

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

Copy a Unit Line

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

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

Delete a Unit

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

Note: 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 , and tap **View Summary**.
3. On **Timesheet Summary**, tap **Units**.

View Revision History

The Audit tab only displays if **Enable timesheet revision auditing** is enabled in Vision core. In addition, you can no longer edit revision comments once you have saved them; you can only view them.

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

Entering Revision Explanation

When the following settings are set in Vision core, Touch Time & Expense requires you to enter an explanation when you make changes to a timesheet:

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

Enter or Select an Explanation for Revisions Made

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

Submit a Timesheet

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

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

Note: If you need to sign the timesheet, 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, and tap .

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

Timesheet Approval

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

Note: If you have view rights but not approve rights, you can still view **Timesheet Approval** screens, but all Approve options (for example, **Approve Selected Timesheets** and ) are disabled.

View Timesheet List for Approval

1. Tap , and tap **Time Approval**.
2. On **Time Approval** (list), tap **Status** or **Group**, depending on how you want to view the timesheets.
3. Scroll through the list or use the search field to filter the list. In using the search field, enter part of the first, preferred, or last name to find records in the list. Touch Time & Expense displays all entries containing the part that you enter. To clear your search, tap .
4. If you want to change the company (if multi-company is used), tap , and tap **Change Company**. In the list of companies, tap a company, and tap **Done**. You can only view and select companies to which you have approve and edit rights.

Review a Timesheet

1. On **Time Approval** (list), tap an employee whose timesheet you want to review.
 To send a quick message to an employee (or employees), tap , and tap **Email Selected Timesheets**. The default email application of your device with the selected employee's email address in the **To** field displays.
2. On **Time Approval** (detail), you can view the details by day, project, or unit by tapping the corresponding tab.
 - To send a message to the employee, tap , and tap **Send Email**.
 - To go back to **Time Approval** (list), tap , and tap **Approval List**.

Approve a Timesheet or Multiple Timesheets

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

1. On **Time Approval** (list), tap  to select an employee or employees whose timesheet(s) you want to approve.
2. Tap , and tap **Approve Selected Timesheets**.

You can also approve an individual timesheet on **Time Approval** (detail). To do this, tap the employee on **Time Approval** (list), and tap  on **Time Approval** (detail).

View Revision History

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

Expense Report

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

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

View the Expense Report List

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

View Expense Report Details

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

Adding an Expense Report

There are two ways of adding an expense report:

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

Add an Expense Report

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

Add an Expense Line

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

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

Edit an Expense Line

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

Copy an Expense Line

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

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

Delete an Expense Report

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

Delete an Expense Line

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

Searching for an Account

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

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

Select Default Currency and Exchange Rate

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 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.

Note: 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, tap the appropriate tax code, and tap **Done**.
5. In **Tax Amount**, enter a value.
6. Tap **Done**.

Edit a Tax Code on an Expense Line

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

Delete a Tax Code from an Expense Line

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

Attaching a Receipt

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

Attach a Receipt and Associate with an Expense Line

1. On **Edit Line**, tap  in the **Receipt** field.
2. Focus your device's camera on the receipt, and tap .
3. On **Picture**, tap **Next**.

Note: If you need to retake the picture, tap .

4. On **Receipt**, enter a description. The same description displays in **File Name**. You can change it if you want.
5. Tap **Done**.

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

Select an Existing Picture from Camera Gallery

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

Select an Existing Receipt for an Expense Line

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

Submit an Expense Report

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

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

Note: If you need to sign the expense report, 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 (unsubmit) and resubmit expense reports if the **Allow Staff Users to Resubmit Expense Reports** option is selected under the Company Expense configuration in Vision core. There are some cases where you can submit in core but not in Touch Time & Expense.

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 **Rejected**.
4. Update the expense report, and tap .

Note: Unsubmitting the expense report in Touch Time & Expense updates the expense report status in core. In addition, re-submitting the expense report resets the approval process in Touch Time & Expense and follows the workflow process in core.

Expense Approval

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

View Expense Report List for Approval

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

Review an Expense Report

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

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

Approve an Expense Report

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

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

Settings

Set a Default View

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

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

Change PIN

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

Modify Server URL

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

Set the Number of Displayed Search Results

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

Enable/Disable Usage Tracking

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

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

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

Set the Number Entry

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

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

4. Tap **Done**.

Configure Touch Time & Expense Settings

1. Tap , and tap **Settings**.
2. You can modify the following:
 - **User ID** – To change the current user, tap **Forget Me on this Device**, and log in again. All options and favorites are lost.
 - **Database** – To change the current database to which you are logged in, tap **Forget Me on this Device**, and log in again. All options and favorites are lost.
 - **Open In** – Tap to select whether the application opens on the **Timesheet Periods**, **Current Timesheet**, or **Expense** screen.
 - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of 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 picker or **Use Keypad** to use a number keypad when entering numbers in hour fields. If you select **Use Picker**, time displays in hours and minutes. If you select **Use Keypad**, time displays in hours using a decimal.
- **Help** – Tap to access the Touch Time & Expense help. You can also access **Help** by tapping , and tapping **Help**.
- **Privacy Policy** – Tap to view the Legal Notices and Privacy Statement information page of Deltek.
- **About** – Tap to view the device and operating system information, which includes the following:
 - Device Type
 - Operating System
 - User Agent Name and Version
 - Application (Native App or Web App) Version
 - Touch Server Version
 - Web Service Version
 - Core System Version
 - Touch Server Build
 - Web App Build

You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek support if you have an issue with the application.

- **Change PIN** – Tap this button to create a new PIN code. Tapping this button directs you to the **Change PIN** screen, where you need to enter your password first before you can create the new PIN.
- **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 , and tapping **Log Out**.

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

Appendix A: If You Need Assistance

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

Customer Services

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

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

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

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

Additional Documentation

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

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

About Deltek

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