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Deltek

# Deltek Mobile Expense for Ajera

User Guide

July 2021

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## Overview

Deltek Mobile Expense for Ajera integrates with Ajera, a project-based accounting system, and allows you to view, enter, update, and submit expense reports from anywhere at any time using your touch screen device and synchronize that data to the Ajera database.

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

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

**Note:** Mobile Expense for Ajera is only available for use with Ajera 9.0 and higher. Touch server must be installed and configured using the guidelines in the *Deltek Mobile Expense for Ajera Installation Guide*.

## Mobile Device Requirement

The Mobile Expense for Ajera application supports mobile devices that run on the following operating systems:

- Apple iOS 13.0 and higher
- Android 8.0 and higher

## Getting Started

In Deltek Ajera, the administrator sends you the Ajera API URL via email. Copy and paste the URL in the **Server URL** field when prompted.

### Install Mobile Expense for Ajera

**If Mobile Expense for Ajera is not yet installed, complete the following steps:**

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

### Log On to Mobile Expense for Ajera

1. Tap *Deltek Mobile Expense for Ajera*.
2. On your first login, the application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

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

3. Enter the URL from the email sent by your Ajera Administrator.
4. Enter your user name and password in the corresponding fields.
5. Tap **Log In**.
6. Enter a six-digit PIN code, which you will use on your succeeding logins. For more information, see [Security PIN](#).

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

## Security PIN



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

**Note:** For Ajera SaaS users, security PIN options are set to defaults and cannot be changed.

- **Minimum PIN Length** – Your System Administrator sets the minimum allowed numbers (ranging from 4 through 12) in the configuration file. By default, it is set to 6.
- **PIN Complexity** – When this feature is turned on, Mobile Expense for Ajera does not allow you to use a repeating PIN (for example, 111111) or sequential PIN (for example, 123456).
- **Unique PIN History** – This feature prevents you from using the same PIN over and over. It allows technical consultants to set the maximum number of PIN reuse (maximum is 6, which means that your current PIN cannot be the same as your last six PINs).
- **PIN Expiration** – This feature determines the validity of your current PIN before Mobile Expense for Ajera requires you to change it. It accepts 0 (meaning no expiration) to 90 days. By default, it is set to 90. If you change your password, uninstall Mobile Expense for Ajera, tap **Forget Me on this Device**, or change user, the expiration resets.

## Log Out of Mobile Expense for Ajera

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

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

## Reset PIN

1. Tap **Log Out**.
2. On the PIN screen, tap **Reset PIN**.
3. On the confirmation dialog box, tap **OK**.
4. Enter your user name and password in the corresponding fields.
5. Enter a new four-digit PIN, and re-enter it to confirm.


## Change User

1. Tap **Log Out**.
2. On the PIN screen, tap **Change User**.
3. On **Log In**, enter another user ID and password.
4. Enter a four-digit PIN code, which you will use on your succeeding logins.

## Closing Mobile Expense for Ajera

If you close Mobile Expense for Ajera completely either from the task bar or by turning off the device.

## Screen Display


The Mobile Expense for Ajera user interface has the following screens, which you can navigate easily by tapping .

### Expense Report

This screen displays when you tap **Expense**. It lists all your expense reports for the last 60 days 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.

### Intelligent Character Recognition (ICR) Technology

Mobile Expense for Ajera uses the camera functionality with ICR. With this feature, the application automatically scans and analyzes the captured or selected image, maps the captured data to the **Expense Line** screen, and populates the matched fields. You can stitch (add multiple pages), crop, or rotate the captured or selected image.

You can only use this feature, however, if the **Use ICR with Mobile** option is selected (turned on) in Deltek Ajera. By default, this option is not selected (turned off) and a company administrator needs to turn it on in order for you to see and use the ICR feature (using  or the Capture Receipt icon) in the mobile application.

**Note:** To enable ICR in Deltek Ajera, navigate to **Setup » Company » Preferences** and, on the **Time & Expense Entry** tab, select **Use ICR for Mobile**.

In addition, you can set activities to be matched with ICR expense types by selecting the **ICR Expense** option in **Setup » General » Activities** in Deltek Ajera.


**Note:** Mobile Expense for Ajera uses the image only to read the data and does not store your data throughout this process.

### Settings

This screen helps you configure the Mobile Expense for Ajera 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.

## Status

Touch Expense uses the following status for expense reports:

- **In Progress** — Expense reports that are not due and have not yet been submitted. You can edit, view, or copy these expense reports.
- **Submitted** — Expense reports that have been submitted but not yet approved. You can view or copy these expense reports. Use Ajera to edit these.
- **Approved** — Expense reports that have been submitted and approved at one level but not yet processed. You can view or copy these expense reports. Use Ajera to edit these.
- **Processed** — Expense reports that have been submitted and approved at all levels. You can view or copy these expense reports. Use Ajera to edit these.





## Picker

Touch Expense displays a picker when you tap certain fields, for example **Begin Date** and **End Date**. The picker displays at the bottom of the application, allowing you to scroll through the list of values and set the appropriate values in the highlighted area (for example, **February/18/2019**). After you set the values, tap **Done** to save your changes.



## Expense Report

Expenses are grouped by Expense Reports. Each expense report has general information about the report and lines associated with the report. By default the expense report list shows expenses from the last 60 days. You can create, update, or submit an expense report from within Mobile Expense for Ajera.


### Search for Expense Reports

1. Tap , and tap **Expense**.
2. To view expenses that are not from the last 60 days, On **Expense Report**, tap .
3. On **Search Expense Reports**, set dates in **From Date** and **To Date**.
4. Tap  . If you want to change the dates, tap  **Clear Filter**.





### View the Expense Report List

1. Tap , and tap **Expense**.
2. On **Expense Report**, scroll through the list to view expense reports, which are sorted descending with most recent at the top.
3. Tap  to refresh the expense report list, including any new or updated items.

### View Expense Report Details




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

### Add an Expense Report



1. Tap , and tap **Expense**.
2. On **Expense Report**, tap .
3. On **New Report**, enter or tap necessary details. You can add an expense line by tapping .
4. When you are done, tap .

## Add an Expense Line

You can add an expense line to an existing or a new report.




1. Tap , and tap **Expense**.
2. On **Expense Report**, tap the expense report you need to update or tap  to add a new report.
3. On **Expense Report** or **New Report**, tap .
4. Enter or tap necessary details.
5. Tap **Done**. You can also tap **Done and Create New** or **Done and Copy**, depending on what you need.

## Edit an Expense Report

1. Tap , and tap **Expense**.
2. On **Expense Report**, scroll through the list and tap the expense report you want to update.
3. On **Expense Report**, make any changes to this report as appropriate, and tap 
  - a) If you need to update an expense line, tap the line under **Expense Lines**.
  - b) On the next screen, make any changes to the line as appropriate, and tap **Done**. You can also tap **Done and Create New** or **Done and Copy**, depending on what you need.



## Copy an Expense Report

The **Units**, **Amount**, and **Reference** values are not copied. In addition, any expense associated with a project or phase that does not have a valid status (for example, Hold or Closed) is not copied.


1. Tap , and tap **Expense**.
2. On **Expense Report**, scroll through the list and tap the expense report you want to copy.
3. On **Expense Report**, tap  and tap **Copy Expense Report**.
4. On **Copy Expense Report**, tap appropriate values for **Begin Date** and **End Date**, and tap **Done**.
5. On **New Report**, make any changes to this report as appropriate.
6. Tap .

## Delete an Expense Report

You can only delete expense report that is in progress.

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

## Delete an Expense Line


1. Tap , and tap **Expense**.
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 the next screen, tap **Delete Expense Line**.

## Attach a Receipt

You can attach a receipt to an expense report by:

- Tapping  (if ICR is enabled) or  (if ICR is disabled) to take a picture of the receipt.
- Opening your camera and tapping  to attach an existing picture of the receipt from your camera gallery or an existing receipt in PDF stored in your device.



You can view receipts attached to expense reports that are images or PDF files (for iOS only). You also have the option to combine receipts into a PDF and attach the file to your expenses.




**Note:** The ICR camera icon  only displays if the **Use ICR for Mobile** option on the **Company Preferences** dialog box in Deltek Ajera is turned on.

Furthermore, if you are using Mobile Expense for Ajera on an iOS device, you can upload PDF files either from your phone storage and attach them to expense lines. You can then view the attached PDF file by tapping **Show PDF**. If you are using the application on an Android device, you need to install a PDF viewer application to view the PDF files.

## Attach a Receipt to an Expense Report (with ICR enabled)

You can capture the receipt and attach it to a new or an existing expense line of a new or an existing expense report.

1. On **Expense Report**, tap  to capture an image.
2. On the captured image, perform any of the following actions:
  - Tap  to capture or select another image (stitch to create a PDF).

- Tap  to crop the image.
- Tap  to delete the image.
- Tap  to rotate the image.

**Note:** Stitch allows you to append additional pages of a receipt and is not intended for different unique receipts.

3. Tap **Submit**.
4. On **Receipts**, enter a description for the captured image. Use the ICR expense assigned to the expense item as the description.

Mobile Expense for Ajera automatically scans and analyzes the captured image, maps the captured data to the **Expense Line** screen, and automatically populates the matched fields.

**Note:** Mobile Expense for Ajera scans and matches the expense items if it is marked for ICR in Deltek Ajera.


5. Tap **Done**.

### Attach a Receipt to an Expense Report (with ICR disabled)

1. Open the expense report you want to update.
2. Under **Expense Lines**, scroll through the list and tap the line.

3. Tap .

4. On **Receipts**, tap .

5. Focus your device's camera on the receipt, and tap .

6. Tap **OK**. If you want to retake the picture, tap **Retry**.



7. On **Picture**, tap **Next**.

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

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

### Attach an Existing Receipt to an Expense Line (with ICR enabled)

1. Open the expense report you want to update.
2. Under **Expense Lines**, scroll through the list and tap the line.

3. On **Receipts**, tap .
4. Select an existing receipt by tapping  and tapping one of the following options:
  - **Add photo from Gallery** – Tap this option to select an existing photo of the receipt from your camera gallery.
  - **Browse** – Tap this option to select an existing receipt in PDF stored in your device. This option, however, only applies to iOS devices.

**Note:** If you are using the mobile application on an Android device, you need to install a PDF viewer application to view the PDF files.



5. Take one of the following actions:
  - If you tapped **Add photo from Gallery** in the previous step, tap **Submit**.
  - If you tapped **Browse** in the previous step, tap **Done**.
6. On **Picture**, tap **Next**.

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

- 7.
8. On **Receipt**, enter a description.
9. Tap **Done**.


**Note:** To delete a receipt, tap the receipt on **Receipts** and then tap **Delete Receipt** on **Receipt**.

### Attach an Existing Receipt from Camera Gallery (with ICR disabled)

1. Open the expense report you want to update.
2. Under **Expense Lines**, scroll through the list and tap the line.
3. Tap .
4. On **Receipts**, tap .
5. Tap the photo that you want to attach.
6. On **Picture**, tap **Next**.
7. On **Receipt**, enter a description. The same description displays in **File Name**. You can change it if you want.
8. Tap **Done**.

## Submit an Expense Report

You can only submit the expense report in Touch Expense if approvals are set up in Ajera and there is at least one expense line in Touch. Once submitted, you can no longer edit the expense report.


1. On **Expense Report**, scroll through the list and tap the report containing the line that you want to submit.
2. Tap , and tap **Yes** to confirm.





## Settings

### Enable/Disable Usage Tracking


Usage tracking keeps a record of the number of times you accessed Mobile Expense for Ajera and the features that you used. 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.


### Configure Mobile Expense for Ajera Settings

1. Tap , and tap **Settings**.
2. Slide or tap any of the following:
  - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Mobile Expense for Ajera (for example, the number of times you access the application and add expense reports). 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.
  - **Help** – Tap to access the Mobile Expense for Ajera 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
    - Ajera Version
    - Touch Server Build
    - Native App 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.

Tap  to go back to **Settings**.

- **Change PIN** – Tap this button to create a new PIN code. Tapping this button requires you to enter your current password before it directs you to the **Change PIN** screen, where you nominate a new PIN.
- **Log Out** – When you close Mobile Expense for Ajera on the device, there is a timeout period during which you do not have to enter your password or PIN when you reopen the application. After the timeout period expires, the application logs you out automatically. You must enter your PIN or password when you reopen it. You can, however, tap **Log Out** to force the logout before the timeout period expires.

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

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

**Note:** If you want to change **Employee Name** and **Company**, tap **Log Out** and tap **Change User** on the PIN screen.

## Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Mobile Expense for Ajera, 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 Mobile Expense for Ajera Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Mobile Expense for Ajera Installation Guide	This document contains instructions on how to install the application.

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## About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. [www.deltek.com](http://www.deltek.com)