Deltek

# Deltek Vantagepoint® Mobile 7.0

## Time and Expense User Guide

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# Contents

# Overview

Deltek Time & Expense for Vantagepoint is a time-tracking tool that allows you to view, enter, update, and submit timesheet data and expense reports.

You can also approve timesheets (if you are a Timesheet system administrator) from anywhere, at any time, using your touch screen device and synchronize that data to the Deltek Vantagepoint database.

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

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

> **Note:** SSL is a term commonly used when referring to both Secure Sockets Layer technology and its successor, Transport Layer Security (TLS). Although you may see references to SSL in this guide and in the application's user interface, all Deltek applications use current TLS protocols to provide protected connections between web servers and web browsers.

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

# Mobile Device Requirements

Review requirements for running Mobile Time & Expense on your mobile device.

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

- Apple iOS 15.0 and higher

# Getting Started

Your Deltek T&E administrator sends you an email message containing a link that directs you to a page that displays one link or two separate links, depending on your mobile operating system.

The contents of the email message are as follows:

For iOS, the page contains two separate links. Tapping the first link directs you to the mobile application in the App Store, allowing you to download it into your device. Tapping the second link automatically populates the **Server URL** field in the downloaded application.

## Install Mobile Time & Expense

Review the steps for installing Mobile Time & Expense on your device.

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

**To install** Mobile Time & Expense**:**

1.  In Apple App Store, search for the application (Deltek T&E for Vantagepoint).

    Make sure that you select the correct application because Deltek has several Time & Expense applications for different products.

2.  Download and install the application by tapping the appropriate buttons.

3.  Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking.

    The Mobile Time & Expense supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple-domain environment.

    Tap **Connection Help** on the **Server URL** screen to view information about establishing a connection to Mobile Time & Expense:

    - Your administrator must install the Deltek T&E Server in order to use Mobile Time & Expense.

    - During setup, the administrator creates an application URL, which is different than your normal Deltek Vantagepoint URL that you access through a PC.

    - The application URL uses the following format by default, where <server> refers to the host name of your Deltek T&E Server. The default URL can be changed to something else by your Deltek Vantagepoint administrator:

        https://<yourdomain>/vantagepoint/touch/time/visionshared/backend/ vantagepointtimeurl.php

    - On the Server URL screen, the Mobile T&E application can also populate incomplete application URL details. For example, if you enter a URL link that contains **/app** or there are missing details at the end of the URL link, the mobile application will autocomplete the link and with **touch/time**. However, please take note of the following:

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- If the URL doesn't end with **/time**, it will append **/touch/time** at the end. Otherwise, it will use **/time** instead.

- If the URL contains **/touch/**, it will replace it with **/touch/time**.

Contact support if you continue to have connection issues.

## Log In to Mobile Time & Expense

Initial logins differ slightly from subsequent logins.

For the initial login, you log in with your username and password and then configure Mobile Time & Expense to use a PIN code, fingerprint ID, or face ID for subsequent logins.

**To log in to** Mobile Time & Expense**:**

1. Tap **Deltek T&E for Vantagepoint**.

2. On your first login, when the application prompts you to accept the Terms and Use of Service and Usage Statistics Tracking, tap the corresponding buttons.

> **Attention:** Starting with iOS 14.5, the Usage Statistics Tracking screen is hidden. When usage tracking is enabled, the application tracks the number of times that you access the application and how often you use certain features. Mobile Time & Expense does not track any personal or confidential data, such as user name, projects, and clients.

3. Tap the link to either download the application from the appropriate app store or automatically populate the **Server URL** field.

   The URL has the following format: https://<yourdomain>/vantagepoint/touch/time/visionshared/backend/vantagepointtimeurl.php.

> **Attention:** For more information about establishing connection to Mobile Time & Expense, tap **Connection Help**.

4. Tap **Connect**.

> **Attention:** Starting with Vantagepoint Mobile 5.0.1, mobile applications validate the TLS certificate used for the Touch URL against the certificate recorded on the Touch server. This ensures that users only connect to a trusted Touch URL. If you receive this error message while trying to connect: "*Insecure connection detected. Please contact your system administrator,*" contact your Vantagepoint administrator for assistance.

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

6. Tap the **Database** field and scroll through the list.

7. Tap a database, and tap **Done**.

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

8. If you want to set the app to use a different language, tap the **Language** field and select the new language.

9. Tap **Log In**.

10. On the **Login** screen, tap **Using Fingerprint/Face ID** or **Using a PIN code**.

11. If the face or fingerprint ID is not enabled, enter a four-digit PIN code, which you will use on your succeeding logins.

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

## Fingerprint or Face ID Authentication

Fingerprint or face ID authentication identifies you, or any user, digitally through fingerprint or face pattern recognition and then authorizes access to the application.

If the fingerprint or face ID feature has been enabled on your device before you install Mobile Time & Expense, the **Using Fingerprint/Face ID** option is available on the **Login** screen. On your initial login, you have the option to use fingerprint/face ID or a PIN code. Depending on the type of authentication that you registered on your device settings, you can use either your fingerprint and/or your face ID. You can also enable or disable the fingerprint or face ID login on the **Settings** screen.

> **Note:** For iOS users, you can use either your fingerprint (for older iOS device) or face ID (for newer iOS device) to access the application.

Administrators control this feature through server-side configuration. When the administrator switches on the fingerprint/face ID feature on the server's setting, you can use this feature in Mobile Time & Expense.

## Security PIN

You can use a security PIN if the fingerprint or face ID feature is not enabled on your device.

Mobile Time & Expense allows you to create a four-digit PIN and then re-enter the PIN to confirm it. Instead of entering your username and password on your next login, you only need to enter your PIN.

## Using Windows Authentication

You can use Windows Authentication to log in to Mobile Time & Expense.

Based on a server-side setting, the application prompts you to log in using your domain credentials when logging in to Deltek Vantagepoint.

You then have the option to log in to Deltek Vantagepoint using either Windows Authentication or a standard username and password. Logging in with domain credentials (either for the Deltek Vantagepoint server or database) requires that you use a PIN.

After your Vantagepoint Administrator sets up single sign-on, you must follow a set of login steps to enable Windows Authentication. Your Vantagepoint Administrator must give you your Microsoft Entra ID domain account username and password.

## Log In Using Windows Authentication

You can log in to Mobile Time & Expense using Windows Authentication.

**To log in using Windows authentication:**

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

## Log In Using Two-Factor Authentication (2FA)

You can only use 2FA in the mobile application if it has been configured in the Vantagepoint browser application.

You are only required to enter a 2FA code if the following options have been set up:

- The **Enable Multi-Factor Authentication Using TOTP** option is selected on the Password Policies screen.
- The **Multi-Factor Authentication** option is selected for you on the **Users** screen.
- The **Multi-Factor Authentication Configured and Confirmed** option is selected on the Users screen.

## Verification Code

You are required to enter the verification code in certain scenarios.

Enter the verification code:

- When you are logging in for the first time
- When you change users
- When your current password has expired and you need to use your password again
- After the Mobile PIN screen, when you are logging in

## Set Up Two-Factor Authentication (2FA) for your Mobile Application

If the 2FA method is enabled for your mobile application, you must activate 2FA the first time that you log in.

**Prerequisite**: Make sure that you have the 2FA application required by your organization installed on your device.

**To set up 2FA:**

1. Log in to the Deltek Vantagepoint browser application.
2. On the next screen, with the **Enter Your Verification Code** field, tap **Set Up Multi-factor Authentication**.
3. On the Set Up Multi-factor Authentication window, scan the displayed QR code using your multi-factor authentication provider.
4. Tap **Done with the Setup**.
5. On the Confirmation window, tap **I'm Sure**.
6. Enter your six-digit verification code, and tap **Log In**.
7. Tap **Settings** » **Security** » **Users**.
8. In your user record, verify that the **Multi-Factor Authentication Configured and Confirmed** option is selected.

## Log In to the Mobile Application Using the 2FA Method

You can log in to Mobile Time & Expense using the 2FA Method.

**To log on:**

1. Tap your installed mobile application.
2. On the **Login** screen, enter your user ID and password, and tap **Log In**.
3. On the Verification Code screen, enter your six-digit verification code (from your 2FA authenticator application), and tap **Log In**.
4. Create your PIN code.

## Enter a New 2FA Verification Code

If your 2FA Verification code has expired (you have used **Change Password**, **Change User**, **Forget me on this device**, or **Reset PIN**), you need to enter a new code.

**To enter a new code:**

1. On the login screen, enter your user ID and password, and tap **Log In**.
2. On the **Verification Code** screen, enter your new six-digit verification code, and tap **Log In**.

## Log Out of Mobile Time & Expense

There are several ways to log out of the Mobile Time & Expense application.

**To log out of the application:**

1. Take one of the following actions:
   - Press the **Home** button of your device.

- Tap ▤ , and tap **Log Out**. When you do this, Mobile Time & Expense prompts you for your PIN or fingerprint/face ID on your next login, regardless of the timeout period.
- Tap ▤ , and tap **Settings**. Tap **Log Out**.

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

> **Note:** The application logs you out automatically when it has been idle for a period of time.

## Change User

The following steps are not applicable if the fingerprint or face ID authentication is enabled.

**To change the user:**

1. Tap **Log Out**.
2. On the PIN screen, tap **Change User**.
3. When the application prompts you to accept Terms and Use of Service and Usage Statistics Tracking, tap the corresponding buttons.
4. On **Log In**, enter another user ID and password.
5. Tap **Log In**.
6. Enter a four-digit PIN code, which you will use on your succeeding logins.

## Closing Mobile Time & Expense

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

## Reset a Forgotten Password

If you forget your password, you can replace it with a new password on the Login screen.

**Prerequisite:** This procedure requires that your employee information includes an email address.

**To reset a forgotten password:**

1. On the Login screen, select the appropriate database.

   If there is only one database available for a Touch URL, the **database** field could be hidden. There are also some databases that don't use the forgot password feature. Contact your system administrator for assistance.
2. Tap **Forgot your password?**
3. On the Log In Assistance screen, enter your user ID.
4. Tap **Send**.

- If the user ID is valid and has an associated email address, an email message that contains a temporary password is sent to that address. Follow the directions in the email message to reset your password the next time that you log in.

- If the user ID is not valid, you will not receive a temporary password. Tap **Close** to return to the Login screen and then contact your system administrator for assistance.

If your administrator requires that you change your password on your next login, or if your password has already expired, see Change Your Password.

## Retrieve a Forgotten User ID

If you forget your user ID, you can retrieve it from the Login screen.

**Prerequisite:** This procedure requires that your employee information includes an email address.

**To retrieve a forgotten user ID:**

1. On the Login screen, select the appropriate database.
2. Tap **Forgot your user ID?**
3. On the Log In Assistance screen, enter your email address.
4. Tap **Send**.
   - If the email address that you entered is associated with a valid user ID, an email message with the user ID is sent to that address. If there are multiple employee records in Vantagepoint using the same email address, an email message is not sent and you must contact your database administrator.

   - If the user ID is not valid, you receive an error message. Tap **Close** to return to the Login screen and then contact your system administrator for assistance.

## Switching Between Screens in Mobile Time & Expense

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

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

## Switching Between Applications on the Device

If you switch between applications on the device, Mobile 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 and not when accessed through the device browser via a URL. Here are some sample scenarios, where your changes are saved in memory:

- You press the **Home** button when there are unsaved changes and opens another app (Mobile 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 Mobile Time & Expense application has different menus, which you can access by tapping
.

## Contents of the Screen Display

Use menu items to access and manage the different Mobile Time & Expense screens.

When you log in, The Periods screen under **Time** is the initial screen. Tap to navigate to the Mobile Time & Expense screens.

**Menu Items**

| Field | Description |
|-------|-------------|
| **Back** | Tap on the upper left-hand side of the screen to go back to the previous screen. |
| **Time** | Tap **Time** to display the available screens, which enable you to perform different tasks for your timesheet.<br>To know more about the different screens, refer to Time. |
| **Expense** | Tap **Expense** to display all the available screens, which enable you to manage credit card charges and expense reports, depending on your role.<br>To know more about the different screens, refer to Expense. |
| **Capture Receipt** | Tap **Capture Receipt** to access the Capture Receipt feature, which enables you to take an image using your device's camera or to select an image from the archive or camera gallery.<br>To know more about this feature, refer to Capture Receipt. |
| **Expense Approval** | This option is available if your role can approve expense reports and you have at least one expense report waiting for approval. Tap **Expense Approvals** to review and approve expense reports.<br>To know more about the different screens, refer to Expense Approval. |
| **Time Approval** | This option is available if your role can approve timesheets and you have at least one timesheet waiting for approval. Tap **Time Approvals** to review and approve employee timesheets.<br>To know more about the different screens, refer to Time Approval. |
| **Settings** | Tap **Settings** to display the Settings screen, on which you configure the Mobile Time & Expense settings according to your business needs and preferences. |

| Field | Description |
|---|---|
| Help | Tap ❓ **Help** to view the user guide for this application. You can also access **Help** from **Settings**. |
| Log Out | Tap ⏻ **Log Out** to log out of the application. |
| Provide Feedback | Tap this button to open your default email application and send a feedback message. For more information, refer to Rating and Feedback. |

# Time

These are the available screens when you tap **Time** on the navigation menu.

When you first log in to the Mobile Time & Expense application, the Periods screen under **Time** is the initial screen.

## Periods

This screen lists all timesheet periods and their corresponding status, which determines a processing option available to you.

This screen displays when you access the application initially or when you tap **Change Period** from the Timesheet menu.

## Timesheet

This screen allows you to perform several tasks for your timesheet.

The name of the screen varies (Units or Hours), depending on the view that you select on **Menu**, which you can accessed by tapping 📑.

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

### Timesheet Hours

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

### Timesheet Units

Tapping **View Units** displays the **Timesheet Units** screen, which allows you to enter units into your timesheets so that you can record the use of non-labor items that should be billed to a project.

Units are only available if they are enabled in your Deltek Vantagepoint database.

> **Note:** This screen looks and works like the **Timesheet Hours** screen except for the displayed fields for **Units** and **Total Units** instead of **Hours** and **Total Hours**.
>
> The **View Units** option only becomes available if your administrator has selected the **Enable unit quantities feature** option in the Timesheet Settings or the **Allow employee to charge units in timesheet** option in the Employee Info Center.

### Timesheet Summary

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

## Expense

These are the available screens when you tap **Expense** on the navigation menu.

## 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:** Mobile 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 Deltek Vantagepoint.

### 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.

### Credit Card Charges

This screen displays all the available credit card charges that require further action.

The **Credit Card Charges** screen is only available if you have access to **Expense** and if the **Enable Use of Credit Cards** option in **Cash Management** is enabled in Deltek Vantagepoint.

To learn how to quickly match credit card charges to expense reports, see the Mobile Credit Card Expense video.

## Capture Receipt

This screen allows you to either take an image using your device's camera or select an image from the archive or camera gallery, and easily attach the image to an expense report.
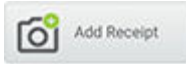
> **Note:** The Capture Receipt screen is available only if you have access to **Expense** and the **Use Intelligent Character Recognition (ICR) in Mobile T&E** option in **Global Expense Options** in Deltek Vantagepoint is selected. To display **Capture Receipt** by default, make sure that **Open In** on Settings is set to **Capture Receipt**.

### ICR Technology

Mobile Time & Expense uses Intelligent Character Recognition (ICR).

With this feature, the application automatically scans and analyzes the captured or selected image, maps the captured data to the Edit Line screen, and populates the matched fields.

After you enable the ICR feature, it works when you:

- Use your device's camera, or select an image from the archive or camera gallery through **Capture Receipt**.

- Tap  in the **Receipt** field on the **New Report** » **Edit Line** screen.

> **Note:** In Deltek Vantagepoint, navigate to **Settings** » **Expense** » **Options** » **Global Expense Options** and set the **Use Intelligent Character Recognition (ICR) in Mobile T&E** to **Yes** to enable ICR.
>
> Mobile Time & Expense uses the image only to read the data and does not store your data throughout this process.
>
> When mapping the captured data to the expense report screens, the ICR feature uses the language set on the device instead of the language selected upon login.

## 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, or Meal.

After you select a category, fields with ⠿ are displayed on each category details screen. You can directly add or edit details in the fields or tap ⠿ to expand the screen and add more details about the selected category.

## Time Approval

As the Timesheet approver, you use this screen to view and approve employee timesheets. You can view the list of timesheets by period. After you select a period, you can view timesheets by status or by group.

## Time Approvals

Use this screen to view the list of timesheets by status or by group.

The screen only displays employees and groups for which you have access and edit rights. Before you enter the screen, a number notification tells you how many pending timesheets there are for you to approve. This number updates each time that you approve or reject a timesheet.

## Timesheets Needing Approvals

This screen allows you to view timesheets for multiple companies in different timesheet periods.

This screen lists timesheet cards. Each timesheet card contains multiple timesheets for a specific company and timesheet period. The timesheet cards are arranged in ascending order, by time period and company name. A number on each timesheet card tells you how many pending timesheets there are to approve.

If there are no pending timesheets, a message is displayed at the center of the screen.

## Time Approval

This screen allows you to view the timesheet details of a particular employee.

You can view and approve timesheet details by day, project, unit, or revision history.

## 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

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**.

## Viewing the Timesheet List

On **Periods**, scroll through the list to view timesheet periods and their status.

A calendar icon displays beside the current timesheet period. Tap a timesheet period to edit that timesheet. On **Timesheet Hours or Units**, if the selected timesheet period is not the current period, a yellow warning indicator displays to the left of **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

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

Timesheets in Mobile Time & Expense automatically display project details associated with a plan, based on the information found in Planning in Vantagepoint. This enables you to save time in filling out your timesheets. The details displayed include the project name, phase, task, and labor code. This functionality works in Mobile Time & Expense if the **Autopopulate timesheet with resource planning assignments** option is selected in the Timesheet Settings in Vantagepoint and if certain conditions are met.

## Editing a Timesheet

Mobile Time & Expense allows you to perform several tasks for your timesheet.

You can enter timesheet data, copy or delete an entire timesheet, create or delete a favorite, view revision history, and save, submit, or reopen a timesheet.

## View a Timesheet

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

**To view a timesheet:**

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 select another period at any time by tapping  and then tapping **Change Period**. If the selected timesheet is not from the current timesheet period, a yellow warning indicator displays to the left of **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

2. On **Timesheet Hours**, switch between different days of a timesheet period by swiping the date carousel to the left or right.
   The selected day is highlighted.

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

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

## View the Timesheet Summary

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

**To view the timesheet summary:**

1. On **Periods**, tap a timesheet period for which you want to view summarized information.

2. On **Timesheet Hours**, swipe the calendar to select a day, or tap the day.

   If the selected timesheet is not from the current timesheet period, a yellow warning indicator displays to the left of **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

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.

## 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.

## Enter Time on the Timesheet Screen (Quick Entry)

Mobile Time & Expense only allows you to enter regular time for projects directly on **Timesheet**. To enter overtime or start and end times, or to modify other aspects of the line, tap anywhere else on the line (for example, tap the project name).

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

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

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

**To enter time on the Timesheet screen:**

1. Swipe the date carousel 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 your keypad.

4. Tap **Done**.

5. Tap .

## Copy a Timesheet

You can easily copy an existing timesheet from a certain period into another timesheet.

**To 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. Mobile 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**, Mobile 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 the **Auto-copy Timesheets upon Submit** option on **Settings**.

## Create a Favorite

Favorites include projects that you access and use most of the time and which you frequently specify on your timesheet.

**To create a favorite:**

1. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.

2. Tap [+].

3. Verify that **Find Project** displays **All** .

4. Scroll through the list or enter a name, number, or client in the search field.
   If the project is not included in the list, tap **Continue Search on Server** to search all of Deltek Vantagepoint.

5. Tap the white star to the left of a project to make it a favorite.
   The star turns gold, to indicate that the project is one of your favorites.

## Delete a Favorite

You can always remove the "favorite" designation for a project.

**To delete a favorite:**

1. On **Timesheet Hours**, swipe the date carousel 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.
   The star turns white to indicate that the project is no longer a favorite.

## Saving a Timesheet

After you make all the changes, you need to tap [save] so that Mobile Time & Expense can save the updated timesheet line to the Deltek Vantagepoint.

- You can update several timesheet lines and save after you make all changes.

- If you tap  and there are unsaved changes, Mobile Time & Expense saves your changes automatically.

- If a signature is required, Mobile Time & Expense prompts you for your PIN.

- If a signature is not required, Mobile 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, Mobile 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, Mobile Time & Expense displays a corresponding error or warning indicator to help you easily identify the lines that you need to address.

- If a line has an error and a warning, the error indicator displays on the Timesheet screen. A red bar on the left of the line indicates an error, while a yellow bar indicates a warning. Timesheets with errors cannot be saved until the error is resolved.

- If a line has multiple errors and warnings, all of the messages display on the **Edit Line** screen with the errors listed at the top. The Error or Warning icon displays for each message.

- If you get an error while adding a line, Mobile Time & Expense returns you to the **Edit Line** screen with the error listed at the top.

## View Revision History

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

> **Note:** The Audit tab only displays if **Enable Revision Audit** is enabled in Deltek Vantagepoint.

**To view the revision history:**

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. In the **Explanation for Revision** field, you can directly add details, tap  to use global comments or tap  to expand the screen and add more details.
6. Tap **Done**.
7. Tap the back button to return to **Timesheet Summary**.

## Entering Revision Explanation

When the following settings are set in Deltek Vantagepoint, Mobile Time & Expense requires you to enter an explanation when you make changes to a timesheet.

- **Enable Revision Audit** option is set to **Yes**.
- **Revision Audit Frequency** and **Require Revision Explanation** fields become available after you selected **Enable Revision Audit**. You can also set these fields according to your preference.

### Enter or Select an Explanation for a Revision

You can enter a revision explanation or select one from the Select Explanation list.

**To enter or select an explanation:**

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

## Submit a Timesheet

You can easily submit a timesheet.

**To submit a timesheet:**

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 ⬇.
4. Enter your four-digit PIN code or scan your fingerprint or face ID for authentication.
5. If electronic signature is enabled, tap **Close**, and then enter your PIN code or scan your registered fingerprint or face ID for authentication.

> **Note:**
> - If you need to sign the timesheet, Mobile Time & Expense prompts you enter your password or PIN.

- If you are submitting a timesheet, but you cancelled the use of fingerprint/face ID or had multiple invalid attempts, you will be redirected to the Login screen to enter your password so you can proceed with the submission.

- 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, Mobile 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.

**To reopen a timesheet:**

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

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

## Editing Timesheet Lines on a Timesheet

In Mobile Time & Expense, you can add and edit timesheet lines in your timesheet.

You can add or delete a timesheet line, copy or delete a timesheet line, copy resource planning assignments, and select a labor code or labor category for a line.

If the selected timesheet line is not from the current timesheet period, a yellow warning indicator displays to the left of **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

# Add a Timesheet Line

You can add timesheet lines for a specific project in a timesheet period.

**To add a timesheet line:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.

3. Tap .

4. On **Find Project**, filter projects by tapping **All** or **Favorites**, or by entering part of a name, number, client, or assignments in the **Search** field.

   Mobile Time & Expense first searches through your favorite and recently used projects.

   - If the project is in the list, tap it.

   - If the project is not in the list, tap **Continue Search on Server** to search all projects in Deltek Vantagepoint.

   - If the project has phases and/or tasks, you need to select the phase and/or task.

5. On **Add Project,** you can either swipe the date carousel to select a day, tap the day, or tap **Done**.

6. Tap the field that you want to update and then enter or tap the appropriate values; depending on your settings, most details of the line are populated with defaults.

   If you swipe the date carousel to another day, your changes are validated and saved locally. You cannot proceed to the next screen if the details do not pass the validation. After your changes are validated, you are redirected to the **Edit Line** screen. If there are multiple timesheet lines in a timesheet period,  displays beside the project header. For more information about adding details on the **Edit Line** screen, see Enter Time on the Edit Line Screen (Detailed Entry).

7. On **Add Project**, tap **Done** after you enter the necessary details.

   Tap **Back** to go back to the **Find Projects** screen or tap **Cancel** to return to the **Timesheet Hours** screen.

8. Tap .

## Selecting Phases and Tasks

If the selected project has phases and/or tasks, the first page of the appropriate screen displays automatically by default.

You can enter part of a phase/task name and tap the search button, or scroll through the list and tap the desired phase/task. Both phases and tasks display in alphabetical order by code, but you can search either by code or name.

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

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

## Copy a Timesheet Line

You can easily copy existing timesheet lines into the current timesheet.

**To copy a timesheet line:**

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

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

You can enter **Overtime** entries on the **Edit Line** screen.

Depending on your settings, you can either use a time picker or your device keypad when selecting or entering values in timesheet hour fields. You control this setting in **Number Entry** on **Settings**.
The keypad is not supported if start and end times are used.

**To enter time on the Edit Line screen:**

1. On **Periods**, tap a timesheet period that you want to update.
2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.
3. Tap anywhere in a timesheet line except the hour field to edit the line.
4. On **Edit Line**, swipe the date carousel to select another day, or tap the day.
   If there are multiple timesheet lines in a timesheet period, ⋮☰ displays beside the project header.
5. Tap ⋮☰ to select a different timesheet line on the **Project Selection** screen.
   - You can tap **Cancel** to go back to the **Edit Line** screen or tap the ➕ to add a new project that is not available in the list. For more information about adding a new project, see Add a Timesheet Line.
   - The project of the selected timesheet line will be displayed on the project header and will still be on the date that you selected before tapping ⋮☰.
6. On **Edit Line**, tap the field that you want to update, and enter or tap the appropriate values.

User-defined fields (UDFs) are in read-only mode and are not editable if revision auditing has already started.

7. Tap **Done** if you are finished editing or tap **Cancel** if you do not want to continue.

If you want to create another timesheet line while still on the **Edit Line** screen, see Add a New Timesheet Line on the Edit Line Screen.

8. On **Timesheet Hours**, tap .

> **Attention:** If there are blank required fields, the Notifications screen displays with all the error messages. Tap an error message and to be redirected to the specific timesheet line date. The error details also appear below the date carousel on the **Edit Line** screen.

## Add a New Timesheet Line on the Edit Line Screen

After saving an updated timesheet line, you can create another timesheet line while staying on the **Edit Line** screen.

**To add a new timesheet line on the Edit Line screen:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.

3. Tap anywhere in a timesheet line except the hour field to edit the line.

4. On **Edit Line**, swipe the date carousel to select another day, or tap the day.

If there are multiple timesheet lines in a timesheet period,  displays beside the project header.

5. Tap **Done and Add New Line**.

6. On **Find Project**, filter projects by tapping **All** or **Favorites**, or by entering part of a name, number, client, or assignments in the **Search** field.

Mobile Time & Expense first searches through your favorite and recently used projects.

- If the project is in the list, tap it.

- If the project is not in the list, tap **Continue Search on Server** to search all projects in Deltek Vantagepoint.

- If the project has phases and/or tasks, you need to select the phase and/or task.

7. On **Add Project,** you can either swipe the date carousel to select a day, tap the day, or tap **Done**.

8. Tap the fields that you want to update and enter or tap the appropriate values; depending on your settings, most details of the line will be populated for you.

9. Tap **Done**.

> **Note:** Tap **Back** if you do not want to continue. You will be redirected to the **Timesheet Hours** screen.

10. Tap ⊞.

## Delete a Timesheet Line

You can easily delete an existing timesheet line on a timesheet.

**To delete a timesheet line:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel 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**.

   - Tap the line to display the **Edit Line** screen, and tap **Remove from Timesheet**. Mobile Time & Expense asks you whether you would like to **Delete Entire Project** or **Delete Time on this Day Only**.

## Copy Resource Planning Assignments

To add timesheet lines quickly and easily, you can copy resource planning assignments using Mobile Time & Expense.

> **Note:** To use this feature, Resource Planning or Accounting must be enabled in Deltek Vantagepoint **Settings » General » Modules** and **Time » Options » Autopopulate From Plan Assignments** must be set to **No**. The **Assignments** tab on **Find Project** becomes available.

**To copy resource planning assignments:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.

3. Tap ⊞.

4. On **Find Project**, tap **Assignments**.

   All projects in the time period for which you have resource planning assignments are listed.

5. If the project that you are looking for is not yet listed, enter the name, number, or client of the project in the **Search** field.

   The search results (including the initial list of projects) follow the **Search result display by** value that you set in **Settings**. For more information, see the Set the Number of Displayed Search Results section of this document.

   - To display the next set of search results, scroll down and tap **Load More Projects**.

   - If there are no assignments to add for this time period, a message displays under the **Search** field.

6. Tap a single project or tap multiple projects, and then tap **Copy Assignments**.

   The selected projects will be retained and added at the top of the list, while you search for other projects currently not found in the list.

   If you cannot add at least one of the projects that you have selected, the assignment may not yet been approved for use in processing.

   Mobile Time & Expense displays all resource planning assignments included in the selected project or projects on the Timesheet Hours screen.

   > **Note:** Mobile Time & Expense copies all resource planning assignment information, which includes phase, task, and labor code, but not hours, so you must enter time for each timesheet line.

7. On **Timesheet Hours**, tap the hour field of a selected line.

8. Either scroll through the time picker to select the appropriate time or enter the time using the keypad.

9. Tap the line to display the **Edit Line** screen, and specify or select values in the required fields.

10. Tap .

    If there are lines with missing required fields and no hours in the timesheet, Mobile Time & Expense removes these lines when you tap **Save**.

## Select a Labor Code for a Line

Mobile 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 specified in the Projects hub in Deltek Vantagepoint.

**To select a labor code:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel 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. Optionally, toggle **Filter Budgeted Levels** to limit the list to include only those labor codes that are budgeted for this project.

   Note the following:

   - When the project that you are updating is set to **Warning** in Deltek Vantagepoint, the **Filter Budgeted Levels** toggle switch is editable in Mobile Time & Expense.

   - When the project that you are updating is set to **Error** in Deltek Vantagepoint, the toggle switch is set to **ON** by default and the list only displays budgeted labor codes in Mobile Time & Expense.

   - When the **Budget Source** budget validation is set to **Project Planning** and **Budgeted Level** is set to **Employee Only** in Deltek Vantagepoint, the toggle switch does not display in Mobile Time & Expense.

- ▪ If the project is not set to budgeting at all, the toggle switch does not display.

6. Scroll through the list, and tap a labor code.

7. Tap **Done**.

## Select a Labor Category for a Line

You can also select a **Labor Category** for your timesheet line.

**To select a labor category:**

1. On **Periods**, tap a timesheet period that you want to update.

2. On **Timesheet Hours**, swipe the date carousel 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 costs where work is performed.

The field only becomes available when **Payroll** is enabled and your **Locale Method** is set to **Follow Project Locale** on the **Payroll** tab of your employee record in Deltek Vantagepoint.

**To select a payroll tax locale:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.

2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.

3. Scroll through the list and tap the appropriate timesheet line.

4. On **Edit Line**, tap the **Payroll Tax Locale** field.

5. Scroll through the list and tap the appropriate value.

6. Tap **Done**.

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

## Adding Start and End Times or Meal Times for a Line, or by Day

The **Start Time/End Time** and **Meal Start/EndTime** only display in Mobile Time & Expense when the required settings are enabled in Deltek Vantagepoint.

On **Start Time/End Time**, if the selected timesheet is not from the current timesheet period, a yellow warning indicator displays to the left of **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

If there is an overlapping time, Mobile Time & Expense does not allow you to save the timesheet. You can either add the start/end time or meal time by project or by day, depending on the settings selected in core.

## Add a Start/End Time for a Line

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

**To add a start/end time:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the date carousel 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 **Start time** and **End time** fields and then enter time using your keypad, or scroll through the time picker to find the appropriate times.
5. Tap **Done**.

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

The **Meal Start Time** and **Meal End Time** fields only display in Mobile Time & Expense when the required settings are enabled in Vantagepoint. If there is overlap between a meal break and time worked on a project, you cannot save the timesheet.

**To add a meal start/end time:**

1. On **Periods**, tap a timesheet period containing the day that you want to update.
2. On **Timesheet Hours**, swipe the date carousel to select a day, or tap the day.
3. Scroll through the list and tap any line on the timesheet.
4. On **Edit Line**, tap either the **Meal start time** field or **Meal end time** field and then enter time using your keypad, or scroll through the time picker to find the appropriate times, and tap **Done**.
   Meal times cannot overlap time worked on projects.
5. Tap the **Number of Breaks** field and then enter a value.
6. When you are done editing, tap **Done**.

## Add a Start/End Time by Day

If Vantagepoint is configured to track start and end times by day, you must enter start and end times by day. You can set the start/end time for specific days or for all days.

If you set the **Start/End Time** in **Settings**, the specified hours apply to all days.

**To add a start/end time by day:**

1. On **Periods**, tap a timesheet period containing the day that you want to update.

2.  On **Timesheet Hours**, swipe the date carousel to select a day (or tap the day), and tap **Add Start/End Time**.

3.  On **Start/End Times**, swipe the date carousel to select a day (or tap the day).

4.  Tap the **Start time** and **End time** fields and then enter time using your keypad, or scroll through the time picker to find the appropriate times.

5.  To apply the values to all days in the period, or as defaults, set the corresponding toggle switch.

6.  Tap **Done**.

## Edit a Start/End Time by Day

You can edit the **Start/End Time** values that you added to a timesheet line.

**To edit a start/end time by day:**

1.  On **Periods**, tap a timesheet period containing the day that you want to update.

2.  On **Timesheet Hours**, swipe the date carousel to select a day (or tap the day), and tap .

3.  On **Start/End Times**, swipe the date carousel to select a day (or tap the day).

4.  Tap the **Start time** and **End time** fields and then enter time using your keypad or scroll through the time picker to find the appropriate time.

5.  Tap **Done**.

## Add a Meal Time by Day

You can set the meal time for specific days or for all days.

If you set the **Meal Start Time** and **Meal End Time** in **Settings**, the specified hours apply to all days.

**To add a meal time by day:**

1.  On **Periods**, tap a timesheet period containing the day that you want to update.

2.  On **Timesheet Hours**, swipe the date carousel to select a day (or tap the day), and tap **Add Start/End Time**.

3.  On **Start/End Times**, swipe the date carousel to select a day (or tap the day).

4.  Tap the **Meal start time** and **Meal end time** fields and enter time using your keypad, or scroll through the time picker to find the appropriate times.

5.  Tap the **Number of Breaks** field and then enter a value.

6.  Tap **Done**.

## Edit a Meal Time by Day

You can edit the meal time that you set for a specific day or for all days.

**To edit a meal time by day:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the date carousel to select a day (or tap the day), and tap ✏ .
3. On **Start/End Times**, swipe the date carousel to select a day (or tap the day).
4. Tap the **Meal start time** and **Meal end time** fields and then enter time using your keypad, or scroll through the time picker to find the appropriate time.
5. Tap **Done**.

## Editing Comments on a Timesheet

Mobile Time & Expense allows you to add and edit comments in your timesheet. You can add a new comment or use historic/global comments in your timesheets.

## Add a Comment to a Timesheet

Mobile Time & Expense does not support formatted comments.

**To add a comment:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.
2. On **Timesheet Hours**, swipe the date carousel 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; to add more comments, tap ⛶ to expand the screen.
6. When you are done editing all fields, tap **Done**.
7. Tap 💾 .

> **Note:** To use a comment that was used previously on this timesheet or to use a global comment, tap ➕.

## Select a Historic or Global Comment

You can use a comment template from the History/Global screen.

**To select a historic or global comment:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.

2. On **Timesheet Hours**, swipe the date carousel 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; to add more comments, tap  to expand the screen, add the comments, and then tap **Done**.

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

8. Tap .

## Delete a Comment from a Timesheet

You can delete existing comments from your timesheet.

**To delete a comment:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.

2. On **Timesheet Hours**, swipe the date carousel 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 .

## Editing Units on a Timesheet

In Mobile Time & Expense, you can add, copy, edit, or delete units in your timesheets. You can also add and edit descriptions for each unit.

On **Timesheet Units**, if the selected timesheet period is not the current period, a yellow warning indicator displays on the left-side of the **Timesheet Period Date Range**. If you tap the yellow warning indicator, a warning message displays.

## Add a Unit Line

A timesheet line can have units for which no time has been logged. Similarly, a timesheet line can have hours specified, without any units.

**To add a unit line:**

1. On **Periods**, tap a timesheet period that contains the project that you want to update.

2. Tap [icon], and tap **View Units**.

3. On **Timesheet Units**, swipe the date carousel to select a day, or tap the day.

4. Tap [icon].

5. On **Find Project**, filter projects by tapping **All** or **Favorites**, or by entering part of a name, number, or client in the search field.

   Mobile Time & Expense first searches through your favorite and recently used projects.

   ▪ If the project is in the list, tap it.

   ▪ If the project is not in the list, tap **Continue Search on Server** to search all projects in Deltek Vantagepoint.

   ▪ If the project has phases and/or tasks, you need to select the phase and/or task.

6. On **Add Project,** you can either swipe the date carousel to select a day, tap the day, or tap **Done**.

7. Make any changes to this line as appropriate, including selecting a unit table and adding a unit.

   An error notification displays if there is a quantity value but there are no assigned units and unit table for that day. If there is no assigned **Unit Table**, you can select a Unit table manually. The **Unit Name** field is automatically populated after you select a unit. This read-only field includes the measurement label for the unit, such as pages, copies, packets, and so on.

   If you swipe the date carousel to another day, your changes are validated and saved locally. You cannot proceed to the next screen if the details do not pass the validation. After your changes are validated, you are redirected to the **Edit Unit** screen. If there are multiple timesheet lines in a timesheet period, [icon] displays beside the project header. For more information about adding details on the **Edit Unit** screen, see Enter Units on Edit Unit (Detailed Entry).

8. On **Add Project**, tap **Done** after you enter the necessary details.

   Tap **Back** to go back to the **Find Projects** screen or tap **Cancel** to return to the **Timesheet Units** screen.

9. Tap [icon].

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

## 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.

**To copy a unit line:**

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 date carousel 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**.

## Enter Units on Timesheet Units (Quick Entry)

You can enter a number of units 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.

**To enter 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 date carousel to select a day, or tap the day.

4. Tap the unit field of the line that you need to edit.

5. On **Edit Unit**, swipe the date carousel to select another day, or tap the day.

6. Enter the number of units, and tap .

## Enter Units on Edit Unit (Detailed Entry)

If a selected project, phase, or task combination has a **Unit Table** on the **Accounting** tab in Deltek Vantagepoint, Mobile Time & Expense automatically selects that **Unit Table** for you. If there is no assigned **Unit Table**, you can select one.

**To enter units:**

1. On **Periods**, tap a timesheet period containing the project that you want to update.

2. Tap , and tap **View Units**.

3. On **Timesheet Units**, swipe the date carousel to select a day, or tap the day.

4. Tap anywhere in the line that you want to edit.

5. On **Edit Unit**, swipe the date carousel to select a day, or tap the day.

   An error notification displays if there is a quantity value but there are no assigned units and unit table for that day.

If there are multiple unit lines in a timesheet period, ⦚☰ displays beside the project header.

6. Tap ⦚☰ to select a different timesheet unit on the **Project Selection** screen.

   ▪ You can tap **Cancel** to go back to the **Edit Unit** screen or tap ➕ to add a new project that is not available in the list. For more information about adding a new project, see Add a Unit Line.

   ▪ The project of the selected unit line will be displayed on the project header and still be on the date that you selected before tapping ⦚☰.

7. On **Edit Unit**, if there is no assigned unit table, tap **Unit Table** and then filter units by entering a part of a name or number in the search field or by scrolling through the list, then tap 🔍.

   ▪ If the unit table is in the list, tap it.

   ▪ If the unit table is not in the list, tap **Load More Unit Tables** to display the next set of search results.

8. If there are no assigned units, tap **Units** and then filter units by entering a part of a name or number in the search field or by scrolling through the list.

   ▪ If the unit 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.

   When you select a unit, the **Unit Name** field is automatically populated. This read-only field contains the measurement label of a unit, such as pages, copies, packets, and so on.

9. Tap **Done**.

   If you want to create another unit line while still on the **Edit Unit** screen, see Add a New Unit Line on the Edit Unit Screen.

10. Tap 💾.

## Add a New Unit Line on the Edit Unit Screen

After saving the updated unit line, you can also create another unit line while on the Edit Unit screen.

**To add a new unit line on the Edit Unit screen:**

1. On **Periods**, tap a timesheet period that contains the project that you want to update.

2. Tap ℹ️, and tap **View Units**.

3. On **Timesheet Units**, swipe the date carousel to select a day, or tap the day.

4. On **Edit Unit**, swipe the date carousel to select a day, or tap the day.

An error notification displays if there is a quantity value but there are no assigned units and unit table for that day.

If there are multiple unit lines in a timesheet period, ▤ displays beside the project header.

5. On **Edit Unit**, if there is no assigned unit table, tap **Unit Table** and then filter units by entering a part of a name or number in the search field or by scrolling through the list, then tap 🔍.

  - If the unit table is in the list, tap it.

  - If the unit table is not in the list, tap **Load More Unit Tables** to display the next set of search results.

6. Tap **Done and Add New Line**.

7. On **Find Project**, filter projects by tapping **All** or **Favorites**, or by entering part of a name, number, client, or assignments in the **Search** field.

  Mobile Time & Expense first searches through your favorite and recently used projects.

  - If the project is in the list, tap it.

  - If the project is not in the list, tap **Continue Search on Server** to search all projects in Deltek Vantagepoint.

  - If the project has phases and/or tasks, you need to select the phase and/or task.

8. On **Add Project,** you can either swipe the date carousel to select a day, tap the day, or tap **Done**.

9. Tap the fields that you want to update and enter or tap the appropriate values; depending on your settings, most details of the line will be populated for you.

10. Tap **Done**.

> **Note:** Tap **Back** if you don't want to continue. You will be redirected to the **Timesheet Units** screen.

11. Tap 💾.

## Delete a Unit

You can delete existing units from your timesheet.

**To delete a unit:**

1. On **Periods**, tap a timesheet period that contains the project for which you want to delete a unit line.

2. Tap ▮, and tap **View Units**.

3. On **Timesheet Units**, swipe the date carousel 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**. Mobile Time & Expense asks you whether you would like to **Delete Entire Project** or **Delete Units on this Day Only**.

## Add a Description to a Unit

You can always add descriptions or comments to your timesheet unit.

**To add a description to a unit:**

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

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

## Delete a Description from a Unit

You can delete the descriptions or comments for a unit that you entered on a timesheet.

**To delete a description for 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 date carousel to select a day, or tap the day.
4. Scroll through the list, and tap the appropriate timesheet line.
5. On **Edit Unit**, tap the **Description** field.
6. In **Description**, tap ⊗.
7. Tap **Done**.
8. If you are done editing the other fields, tap **Done**.

9. Tap .

## View the Unit Summary

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

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

**To view the unit summary:**

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**.

# Benefit Hours

Tapping **View Benefit Hours** displays the Benefit Hours screen, which enables you to view summarized benefit hours such as PTO/personal, sick, and holiday leave balances.

The **View Benefit Hours** option is available on all Timesheet screen menus. For more information, see Viewing the Benefits Hours List.

## Viewing the Benefit Hours List

Mobile Time & Expense enables you to view the summary of all the benefit hours you have earned and taken for the current year.

You can access the Benefit Hours screen on all Timesheet screens and under Periods. Tap  and then select the **View Benefit Hours** option.

The Benefit Hours screen displays the following details for the PTO/personal, Sick, Holiday benefit hours, and other types of benefit hours that your company provides:

- **Starting Balance**: This field displays the total benefit hours at the beginning of the year.

- **Current Year Earned**: This field displays the hours of benefit time earned in the current year.

- **Current Year Taken**: This field displays the hours of benefit time taken in the current year.

- **Unposted Time**: This field displays the outstanding benefit time that is not posted for the current year.

- **Current Balance**: This field displays the total benefit hours left for the year.

# Absence Requests

You can request sick leave, vacation leave, holiday time, and other absence types in Mobile Time & Expense.

The **Request Absence** and **View Previous Requests** options are available on the **Periods** and **Timesheet Hours** menu of Mobile Time & Expense, if absence requests are configured in the Absence Accrual application of **Accounting** settings in Vantagepoint and you configure an approval workflow for absence requests.

## Submit an Absence Request

You can submit an absence request for time off from work in Mobile Time & Expense.

**To enter and submit an absence request:**

1. On **Periods** or **Timesheet Hours**, tap ▤ and then tap **Request Absence**.

2. On the **Request Absence** screen, tap the **Type** field and select the type of absence that you would like to request, such as vacation or sick leave.

3. Tap the **Start Date** and **End Date** fields and enter dates using your keypad, or use the date picker to select the appropriate dates.

4. Tap **Done**.

5. On the next screen, you can change the type of absence that you previously selected by tapping the **Type** field.

6. Under **Request Dates**, tap a **Time** field and either enter the number of hours that you would like to request or use the time picker to select the number of hours and minutes; be sure to complete all the **Time** fields.
   Your total number of requested leave hours, as well as your remaining leave balance, is displayed under **Time Hours Requested** and **Current Balance**.

7. In the **Comments** field, enter any additional information.

8. Tap **Submit Absence Request**.

## View Previously Requested Absences

You can view previously requested absence requests from **Periods** or **Timesheet Hours**.

Only future absence requests are displayed in Mobile Time & Expense. After the dates of the request have passed, those dates are not displayed.

**To view previously requested absences:**

1. On **Periods** or **Timesheet Hours**, tap ▤ and then tap **View Previous Requests**.

   The **Previous Requests** screen displays the leave details, approver comments, and status of your previously submitted absence requests. This information can help you monitor your remaining leave for the year.

If an absence request is rejected, you need to submit a new request with the corrected information.

2.  To submit a new absence request, tap **Request Absence**.

# Timesheet Approval

This section only applies to Timesheet approver.

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

## View Timesheet List for Approval

You can view the timesheet list by **Status** or **Group**.

This task is applicable for timesheets in a single timesheet period.

**To view the timesheet list for approvals:**

1. Tap ![menu icon], and tap **Time Approvals**.

2. On **Time Approvals**, tap **Status** or **Group**, depending on how you want to view the timesheets.

3. Scroll through the list or use the search field to filter the list by entering a first, preferred, or last name.

   Mobile Time & Expense displays all entries containing the part that you enter.

4. To clear your search, tap ![x icon].

## View the Timesheet Card List for Approval

You can view multiple timesheets through timesheet cards.

This task is only applicable if there are timesheets for multiple companies in different timesheet periods.

**To view the timesheet card list for approval:**

1. Tap ![menu icon], and tap **Time Approvals**.

2. On **Timesheets Needing Approvals**, tap a **timesheet card**.

   A number on each card tells you how many pending timesheets there are to approve.

3. On **Time Approvals**, tap **Status** or **Group**, depending on how you want to view the timesheets.

4. Scroll through the list or use the search field to filter the list by entering part of a first, preferred, or last name.

   Mobile Time & Expense displays all entries containing the part that you enter.

5. To clear your search, tap ![x icon].

   If there are no timesheets to approve, a message is displayed on the screen.

## Review a Timesheet

You can review each timesheet before approving it.

**To review a timesheet:**

1. On **Time Approvals**, tap an employee whose timesheet you want to review.
2. Tap **Status** or **Group**, depending on how you want to filter the list.
   - To change the company (if your firm uses multiple companies), 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 approval rights.
   - To go back to the timesheet list (or timesheet card list), tap █, and tap **Timesheets Needing Approval**.
   - To approve multiple timesheets, tap ✓ for those timesheets, tap █, and tap **Approve Selected Timesheets**.
   - To add another approver or reassign approval of the selected timesheet, tap █ and tap **Reassign Approval**.
   - To send a quick message to an employee (or employees), tap █, and tap **Email Selected Employees**. The default email application of your device is displayed, with the selected employee's email address in the **To** field.
3. On **Time Approval**, you can view the details by day, project, or unit by tapping the corresponding tab.
   - Tap ▢ to display all comments added to the timesheet. Tap the next or previous button to display the entries with comments. Tap **Cancel** to go back to the previous screen.
   - To enter a comment before you approve the timesheet, tap █, and tap **Approve with Comment**.
   - To reject a timesheet, tap █, and tap **Reject Timesheet**.
   - To add another approver or reassign approval, tap █, and tap **Reassign Approval**.
   - To send a message to the employee, tap █, and tap **Send Email**.
   - To go back to **Time Approvals**, tap █, and tap **Approval List**.

> **Note:** When you approve or reject a timesheet, you can add lines of text directly in the **Comment** field. To add more comments, tap ⛶ to expand the screen. The comments that you entered are displayed on the Timesheet Hours screen of the approved or rejected timesheet.

> **Note:** When you tap **Approve**, **Reject**, or **Reassign**, Mobile Time & Expense verifies that there are no changes to the selected timesheet in Deltek Vantagepoint. If there is a change in Deltek Vantagepoint, Mobile Time & Expense informs you about it and reloads the affected timesheet.

> Only those timesheets with a conflict in Deltek Vantagepoint do not automatically proceed with the approval, rejection, or reassignment.

## Approve a Timesheet or Multiple Timesheets

You can approve multiple timesheets to save time.

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

**To approve timesheets:**

1. On **Time Approvals**, tap ☑ to select an employee or employees whose timesheet(s) you want to approve.

2. Tap ⋮, and tap **Approve Selected Timesheets**.

    You can also approve an individual timesheet on **Time Approval**. To do this, tap the employee on **Time Approvals**, and tap ☑ on **Time Approval**.

    Alternatively, on **Time Approval**, you can tap ⋮ and tap **Approve with Comment**. On **Approve Timesheet**, enter your comment and tap **Approve Timesheet**.

## View Revision History

You can always view the revision history of your timesheet approvals for a certain employee.

**To view the 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 or 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 Mobile Time & Expense.

> **Note:** To display **Expense Report** by default, make sure that **Open In** on **Settings** is set to **Expense**.
>
> Any expense grid settings set in **Screen Designer** » **Expense Report** in Deltek Vantagepoint are applied in the existing and new expense lines.

## View the Expense Report List

You can view the most recent expense reports.

**To 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 and with most recent at the top.
   The list displays the last 25 reports.

## View Expense Report Details

You can view the specific details on each expense report.

**To view the expense report details:**

1. Tap ☰, and tap **Expense**.

2. On **Expense Report**, scroll through the list to view expense reports.

3. Tap a report to view details.

## Default Expense Location

If the **Tax Auditing** feature is enabled, you can override the default tax codes for expense reports based on expense report categories and your rights.

You can set the default expense location in the mobile application by selecting a value in the new **Default Expense Location** field on the **New Report** or **Expense Report** screen. The options include all expense locations that have been set up in the All Groups and any of your expense group categories. Changing the default expense location, however, does not affect existing expense sheet lines.

## Adding an Expense Report

You can easily add, edit, copy, delete, submit expense reports. You can also create and edit expense lines to update your expense report.

There are different ways of adding an expense report:

- Create a new report using the New report screen
- Open an existing report and copy it to crate a new one
- Create a new report using **Capture Receipt**
- Create a new report using credit card charges

### Add an Expense Report

You can add a new expense report at any time.

**To add an expense report:**

1. Tap ▤, and tap **Expense**.

2. On **Expense Report**, tap ➕.

3. On **New Report**, enter or select the necessary details, and tap **Done**.

   You can enter dates using your keypad or scroll through the date picker and select the appropriate date.

4. If you have credit card charges, respond to the prompts to **Add from Credit Card** or **Add Manually or from Receipt Capture**.

   For instructions, see Add a New Expense Line from Credit Card Charges.

   If you do not have credit card charges, you are automatically redirected to the **Edit Line** screen so you can add an expense line manually. For instructions, see Add an Expense Line.

5. Tap 💾.

### Copy an Expense Report

You can easily copy an existing expense report.

**To copy an expense report:**

1. Tap ▤, and tap **Expense**.

2. On **Expense Report**, scroll through the list and tap the report that you want to copy.

3. On **Expense Report**, tap ⋮ and tap **Copy Expense Report**.

   If there are unsaved changes to the expense report, the application prompts you to save the report.

4. On **Expense Report**, make any changes to this report as appropriate, including adding expenses.

   Depending on your settings, certain details are defaulted for you.

5. Tap [icon].

## Add an Expense Line

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

**To add an expense line:**

1. Tap [icon], and tap **Expense**.

2. On **Expense Report**, scroll through the list and tap the report to which you want to add an expense line.

3. Tap [icon].

   If you have a credit card charge, you are prompted to **Add from Credit Card** or to **Add Manually or from Receipt Capture**. For instructions, see Add a New Expense Line from Credit Card Charges.

4. On **Edit Line**, make changes to this report as appropriate.

   > **Note:** You can also access **Edit Line** by tapping **Done** on **New Report** and then tapping [icon]. If you tried to submit an expense report with blank required fields, you receive a notification.

5. Tap **Done**.

   > **Note:** After you select a category, fields with ⌗ are displayed on each category details screen. You can add details directly in the field or tap ⌗ to expand the screen and add more details about the selected category.

## Edit an Expense Line

You can edit an existing expense line in an expense report.

**To edit an expense line:**

1. Tap [icon], 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 expense report, as appropriate.

   You can enter dates using your keypad or scroll through the date picker and select the appropriate date.

5. Tap **Done**.

After you select a category, fields with ⋈ display on each category details screen. You can add details directly in the field or tap ⋈ to expand the screen and add more details about the selected category.

If you try to submit an expense report with blank required fields, you receive a notification.

## Copy an Expense Line

You can easily copy an expense line from an existing expense report.

**To copy an expense line:**

1. Tap ▤, and tap **Expense Report**.

2. On **Expense Report**, scroll through the list and tap the report with the expense line that you want to copy.

3. Scroll through the list of expense lines, and tap the expense line that you need to copy.

4. On **Edit Line**, tap **Done and Copy**.

5. Make any changes to this report as appropriate, and tap **Done**.

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

## Delete an Expense Line

You can easily delete an existing expense line.

**To 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.

## Delete an Expense Report

You can delete an existing expense report.

**To 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.

## Select the Default Currency and Exchange Rate

Mobile Time & Expense allows you to select or update the default transaction currency and exchange rate for an expense report.

This screen only displays if **Multicurrency** is enabled in Deltek Vantagepoint.

**To select the default currency and exchange rate:**

1. Open the **Currency Options** screen in one of two ways:

   ▪ On **New Report**, tap **Currency Options**.

   ▪ On **Expense Report**, tap  and then tap **Currency Options**.

2. Make any changes to the **Currency Options** screen as appropriate.

   ▪ The **Default Transaction Currency** field displays the currency, which you usually select on the **New Report** screen or which is selected by default from the **General Company Settings** in Deltek Vantagepoint. You can always change the currency on the individual expense lines if needed.

   ▪ Under **Override Transaction Currency Exchange Rate**, select one of the following options from the **Method** drop-down list:

      ▪ **None**: Tapping this option sets the **Method** field to **None**.

      ▪ **Date**: Tapping this option displays the **Date** field below the **Method** field. You can then enter a date using your keypad or select a date from the date picker. The application uses this date to select the currency exchange rate (which is determined by the **Daily Exchange Rate** in **Settings** in Deltek Vantagepoint) for newly added expense lines.

      ▪ **Rate**: Tapping this option displays the **Rate** field below the **Method** field. Tapping this field displays the virtual keyboard with numbers and symbols, which you can then tap to enter a value. This value overrides the rate used for new expense lines.

## Submit an Expense Report

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

**To submit an expense report:**

1. On **Expense Report**, tap a period containing the expense report that you want to submit.

2. Tap .

3. Enter your four-digit PIN code or scan your fingerprint or face ID for authentication.

4. If electronic signature is enabled, tap **Close**, and enter your PIN code, or scan your registered fingerprint or face ID for authentication.

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**Note:**

- If you need to sign the expense report, Mobile Time & Expense prompts you for your password or PIN.

- If you are submitting an expense report, but you cancelled the use of fingerprint/face ID or had multiple invalid attempts, you will be redirected to the Login screen to enter your password so you can proceed with the submission.

- If you submitted an expense report, any credit card charges that are auto-matched to the expense lines of that expense report are confirmed and removed from the Matched list.

- If there are any errors or warnings, a notifications screen displays. If there are only warnings, you can either tap Continue to submit the expense report or tap the back button to return to the report and make changes. If there is an error, you need to tap the back button to return to the report and correct it before submitting. Lines that caused the error or warning have red or yellow indicators next to them. Red indicates an error and yellow a warning.

- If you have rights to reopen the expense report,  becomes  after submission. Otherwise, submitted expense reports are read-only.

---

## Reopen an Expense Report

You can only reopen and resubmit expense reports if the **Allow Staff Users to resubmit Expense reports** option is selected under Company Expense settings.

There are some cases where you can submit in Deltek Vantagepoint, but not in Mobile Time & Expense.

**To reopen an expense report:**

1. On **Expense Report**, scroll through the list to select a period.

2. Tap the submitted expense report period.

3. On **Expense Report** (detail view), tap .

   The button becomes  and the expense report's status becomes **In Progress**.

4. Update the expense report, and tap .

## View the Credit Card Charges List

The following steps are only applicable if you have current credit card charges.

If there are credit card charges, you see a number notification beside Expense and on the  of the Expense Report screen. The number updates every time that you add or delete a credit card charge on an expense report.

**To view the credit card charges list:**

1. Tap , and tap **Expense**.

2. On the credit card notification message, tap **View Charges**.

   > **Note:** On **Credit Card Charges**, the **Not Matched** tab is selected by default if there are no credit card charges with a matched expense line. The **Not Matched** tab displays all unmatched and partially matched credit card charges. However, the **Matched** tab is selected by default if all of your credit card charges have matched expense lines. Charges are auto-matched to expense lines when there is an exact match on the expense line date and amount, if the merchant description is similar.

3. Tap the **Matched** tab to view all auto-matched credit card charges.

## Matching Credit Card Charges with Expense Lines

You can easily create expense lines from credit card charges or match existing expense lines to credit card charges.

### Review Credit Card Charges in the Not Matched List

You can review the credit card charges listed in the Not Matched list and then decide how to handle them.

**To verify a credit card charge in the Not Matched list:**

1. Tap a credit card charge in the list.
   You can also check **Select All** to choose all credit card charges.
   If you select multiple credit card charges, tap  to add them to an expense report. For instructions, see Adding a Credit Card Charge.

2. If the credit card charge has a partially matched expense line, proceed to step 4; if it does not have a partially matched expense line, tap one of the available options:

   - **Match it later**: Tapping this option redirects you back to Credit Card Charges, with no changes applied.

   - **Create new line**: Tapping this option allows you to select an existing expense report or create a new expense report in which you can add the selected credit card charge as a new expense line.

- **Match with another line**: Tapping this option redirects you to the Expense Lines screen to match the selected credit card charge to an existing (in-progress) expense line. The expense lines are sorted by date, in descending order.

- **Mark personal or clear from list**: Tapping this option removes the selected credit card charge from the **Not Matched** list and marks it as a personal charge.

3. Tap **Next**.

For **Create new line**, perform the following:

a) On **Expense Report**, select an existing report or tap  to create a new expense report.

b) On **Edit Line**, make the necessary changes and tap **Done**.

The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

c) Tap .

After you tap , the credit card charges are removed from the **Not Matched** list.

You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

For **Match with another line**, perform the following:

a) On the **Expense Lines** list, select an existing (in-progress) expense line.

A message appears if there are no existing expense lines. You are advised to create a new expense report for the selected credit card charge.

b) On **Edit Line**, make the necessary changes and tap **Done**.

The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

c) Tap .

After you tap , the credit card charges are removed from the **Not Matched** list.

You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

4. If there is a partially matched expense line, compare the expense line details with the credit card charge details.

> **Note:** The credit card details are highlighted in blue if there is an exact match and highlighted in red if there are any differences with the expense line. Mobile Time &

> Expense matches the expense line and credit card charge's **Date**, **Merchant Description**, and **Amount** fields.

5. If the details are identified as a match, tap **This Is a Match**.

   If there is a difference in amount, perform the following steps:

   a) On the **Confirm Match** screen, tap one of the available options:

      - **Match it later**:Tapping this option redirects you back to Credit Card Charges with the difference of the amount listed as a charge in the unmatched list.

      - **Create new line**: Tapping this option allows you to select an existing expense report or create a new expense report to add the difference in amount as a new line.

      - **Match with another line**: Tapping this option redirects you to the Expense Lines screen to match the difference in amount to another existing in-progress expense line.

      - **Mark personal or clear from list**: Tapping this option removes the difference in amount from the list of charges.

   b) Tap **Next**.

      - For **Create new line**, perform the following steps:

        - On **Expense Report**, select an existing report or tap ▦ to create a new expense report.

        - On **Edit Line**, make the necessary changes and tap **Done**.

          The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

        - Tap ▦ .

          After you tap ▦ , the credit card charges are removed from the **Not Matched** list.

          You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

      - For **Match with another line**, perform the following steps:

        - On the **Expense Lines** list, select an existing (in-progress) expense line.

          A message appears if there are no existing expense lines. You are advised to create a new expense report for the selected credit card charge.

        - On **Edit Line**, make the necessary changes and tap **Done**.

          The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit

card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

- Tap ▣.

  After you tap ▣, the credit card charges are removed from the **Not Matched** list.

  You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

If there is a difference in date, perform the following steps:

a) On the **Confirm Match** screen, tap one of the available options:

- **Keep expense line date**: Tapping this option uses the expense line's date for the expense line.

- **Use credit card charge date**: Tapping this option uses the credit card charge's date for the expense line.

b) Tap **Next**.

   You are redirected to the **Credit Card Charges**. The matched credit card charge is now removed from the list.

6. If the details do not match, tap **This Is Not a Match**.

   a) On the **Confirm Match** screen, tap one of the available options:

   - **Match it later**: Tapping this option redirects you back to **Credit Card Charges**, with no changes applied.

   - **Create new line**: Tapping this option allows you to select an existing expense report or create a new expense report to add the selected credit card charge as a new expense line.

   - **Match with another line**: Tapping this option redirects you to the **Expense Lines** screen to match the selected credit card charge to a different existing in-progress expense line. The expense lines are sorted by date, in descending order.

   - **Mark personal or clear from list**: Tapping this option removes the selected credit card charge from the **Not Matched** list and marks it as a personal charge.

   b) Tap **Next**.

   - For **Create new line**, perform the following the steps:

     - On **Expense Report**, select an existing report or tap ➕ to create a new expense report.

     - On **Edit Line**, make the necessary changes and tap **Done**.

       The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit

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card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

- Tap ▣ .

- For **Match with another line**, perform the following the steps:

  - On the **Expense Lines** list, select an existing (in-progress) expense line.

    A message appears if there are no existing expense lines. You are advised to create a new expense report for the selected credit card charge.

  - On **Edit Line**, make the necessary changes and tap **Done**.

    The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

  - Tap ▣ .

    After you tap ▣ , the matched credit card charges are removed from the **Credit Card Charges** list.

    You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

## Confirm Credit Card Charges in the Matched List

You can easily confirm all auto-matched credit card charges in the Matched list.

**To confirm auto-matched charges in the Matched list:**

1. Tap a credit card charge in the list.
   You can also check **Select All** to choose all auto-matched credit card charges.
   If you select multiple credit card charges, tap ▤ to add them to an expense report. For instructions, see Adding a Credit Card Charge.

2. Compare the expense line details with the credit card charge details.

3. If the details are identified as a match, tap **This Is a Match**.

> **Note:**
> - Partially matched Merchant Description are highlighted in blue (for expense line) and red (for credit card charge). Mobile Time and Expense matches the expense line and credit card charge's **Date**, **Merchant Description**, and **Amount** fields.
> - After you tap **This is a Match**, you are redirected to the **Matched** list.

> ▪ Proceed to **step 4** if the details are identified as not matched.

4. If the details do not match, tap **This Is Not a Match**.

   a) On the **Confirm Match** screen, tap one of the available options:

      ▪ **Match it later**: Tapping this option redirects you back to **Credit Card Charges**, with no changes applied.

      ▪ **Create new line**: Tapping this option allows you to select an existing expense report or create a new expense report to add the selected credit card charge as a new expense line.

      ▪ **Match with another line**: Tapping this option redirects you to the **Expense Lines** screen to match the selected credit card charge to an existing (in-progress) expense line. The expense lines are sorted by date, in descending order.

      ▪ **Mark personal or clear from list**: Tapping this option removes the selected credit card charge from the **Matched** list and marks it as a personal charge.

   b) Tap **Next**.

      ▪ For **Create new line**, perform the following steps:

         ▪ On **Expense Report**, select an existing report or tap ➕ to create a new expense report.

         ▪ On **Edit Line**, make the necessary changes and tap **Done**.

            The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

         ▪ Tap 🖫.

      ▪ For **Match with another line**, perform the following steps:

         ▪ On the **Expense Lines** list, select an existing (in-progress) expense line.

            A message appears if there are no existing expense lines. You are advised to create a new expense report for the selected credit card charge.

         ▪ On **Edit Line**, make the necessary changes and tap **Done**.

            The selected credit card charge is now an expense line of the expense report. If you tapped **Done and Create New** and you still have existing credit card charges, you can select to create the new line from a charge. For instructions, see Add a New Expense Line from Credit Card Charges. If you don't have credit card charges left, you are redirected to the **Edit Line** screen.

         ▪ Tap 🖫.

After you tap , the matched credit card charges are removed from the **Not Matched** list.

You can use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

## Adding a Credit Card Charge

You can easily add credit card charges to a new or existing expense report.

There are different ways of adding credit card charges to your expense report:

- Add a credit card charge to a new expense report
- Add a credit card charge to an existing expense report
- Confirm all matched credit card charges in the Matched list

## Add a Credit Card Charge to a New Expense Report

You can easily add a credit charge to a new expense report.

**To add a credit card charge to a new expense report:**

1. Tap , and tap **Expense**.

2. On the credit card notification message, tap **View Charges**.

3. On **Credit Card Charges**, tap  to select a credit card charge.

    You can also check **Select All** to choose all credit card charges.

4. Tap , and tap **Add to New Expense Report**.

5. The **Add to New Expense Report** is disabled if you have not selected a credit card charge.

6. On **New Report**, enter the necessary details and tap **Done**.

7. The selected credit card charge is now an expense line of the new expense report.

8. Tap .

    After tapping , all credit card charges added to the expense report are removed from the **Credit Card Charges** list.

    You can edit the credit card charge amount before or after saving the expense report. The difference in amount is automatically returned to the **Matched** list.

## Add a Credit Card Charge to an Existing Expense Report

You can easily add a credit card charge to an existing expense report.

**To add a credit card charge to an existing expense report:**

1. Tap ▬, and tap **Expense**.

2. On the credit card notification message, tap **View Charges**.

3. On **Credit Card Charges**, tap ✓ to select a credit card charge.

   You can also check **Select All** to choose all credit card charges.

4. Tap ⋮, and tap **Add to Existing Expense Report**.

   - **Add to Existing Expense Report** is disabled if you have not selected a credit card charge.

   - If you have no in-progress expense reports, a message displays that prompts you to create a new expense report.

5. On **Expense Report**, select an existing in-progress expense report from the list.

   The selected credit card charge is now an expense line of the expense report.

6. Tap 💾.

   After tapping 💾, all credit card charges added to the expense report are removed from the **Credit Card Charges** list.

   You can edit the credit card charge amount before or after saving the expense report. The difference in amount is automatically returned to the **Not Matched** list.

## Confirm All Matched Credit Card Charges

You can confirm all the matched credit card charges on the Matched tab.

> **Note:** This option is disabled if there are no auto-matched credit card charges.

**To confirm all matched credit card charges:**

1. Tap ▬, and tap **Expense**.

2. On the credit card notification message, tap **View Charges**.

3. On the Matched tab, tap ⋮ and tap **Confirm All Matched Charges**.

   > **Note:** If you don't confirm the auto-matched charges, they will be automatically confirmed when the associated expense report is submitted and removed from the **Matched** list.
   >
   > After confirming all matched charges, all auto-matched charges are saved to the expense lines and removed from the list.

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> If you deleted an expense line or expense report where a credit card charge is associated, the credit card charge amount automatically returned to the **Not Matched** list.

## Add a New Expense Line from Credit Card Charges

You can add a new expense line from the **Credit Card Charges** list.

> **Note:** The following steps are only applicable if you have credit card charges. If you don't have credit card charges, the Credit Card Expense dialog box is disabled.

**To add a new expense line:**

1. Tap ▤, and tap **Expense**.

2. On **Expense Report**, scroll through the list and tap the in-progress expense report that you want to edit.

3. On **Expense Report** (detail view), tap ➕.

4. On the Credit Card Expense dialog box, tap one of the available options:

   - **Add from Credit Card**: Tapping this option redirects you back to the **Credit Card Charges** list. Perform the following actions:

     1. On **Credit Card Charges**, tap a credit card charge.

     2. On **Edit Line**, make the necessary changes, and tap **Done**. The selected credit card charge is now an expense line of the expense report.

     3. Tap 🖫.

   - **Add Manually or From Receipt Capture**: Tapping this option allows you to manually create a new expense line without using credit card charge or if ICR is enabled you can take a photo of your receipt and use it to create an expense line.

   - **Cancel**: Tapping this option closes the dialog box.

     After you tap 🖫, all credit card charges added to the existing expense report are removed from the **Not Matched** list.

     You can also use ICR to create an expense line and then match it to a credit card charge; however, you cannot use ICR after an existing expense line has been matched to a credit card charge.

## Edit a Credit Card Charge Amount on an Expense Line

You can easily edit the credit card amount you entered on an expense line.

**To edit a credit card charge amount:**

1. Tap ▤, and tap **Expense**.

2.  On **Expense Report** (detail view), scroll through the **Expense Lines** list and tap the line that you want to edit.

3.  On **Edit Line**, edit the value in the **Amount** field.

4.  Tap **Done**.

    The expense line is now updated.

5.  Tap .

    After tapping , the difference in amount is automatically returned to the **Not Matched** list.

    If the expense line amount is greater than the matched credit card charge amount, the remaining negative balance is not returned to the **Not Matched** list. **Mark as Personal** is the only available option for the negative balance.

## Delete an Expense Line with Credit Card Charges from the Expense Lines List

You can easily delete an expense line with credit card charge.

**To delete an expense line with a credit card charge:**

1.  Tap , and tap **Expense**.

2.  On **Expense Report** (detail view), scroll through the **Expense Lines** list and tap the line containing the credit card charge amount 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**.

> **Note:** After tapping **Yes**, the credit card charge amount from the expense line you deleted automatically returned to the **Not Matched** list.

## Undo Clearing of Credit Card Charges

The **Undo Clear Charge** option is available if you have previously marked personal credit card charges.

The charges in the Undo Clear Charge screen remain up to 30 days.

> **Note:** This option is only available on Mobile Time & Expense.

There are two ways to undo credit card charges that are marked as personal:

- Undo Clear Credit Card Charges on the Expense Report Screen
- Undo Clear Credit Card Charges on the Credit Card Charges Screen

## Undo Clear Credit Card Charges on the Expense Report Screen

You can undo the credit card charges that were previously cleared on the Expense Report screen.

**To undo clear credit card chargers:**

1. Tap ☰, and tap **Expense**.

2. On **Expense Report**, tap 🔲 and tap **Undo Clear Charge**.

3. On **Undo Clear Charge**, tap ✅ to select a credit card charge.

   You can also check **Select All** to choose all credit card charges.

4. After selecting charges, tap **Undo Clear Charge** below the screen.

   The cleared charges are automatically returned to the **Not Matched** or **Matched** (if there is a matched expense line) list.

## Undo Clear Credit Card Charges on the Credit Card Charges Screen

You can also undo the credit card charges that were previously cleared on the Credit Card Charges screen.

**To undo clear credit card charges:**

1. On **Credit Card Charges**, tap 🔲 and tap **Undo Clear Charge**.

2. On **Undo Clear Charge**, tap ✅ to select a credit card charge.

   You can also check **Select All** to choose all credit card charges.

3. After selecting charges, tap **Undo Clear Charge** below the screen.

   The cleared charges are automatically returned to the **Not Matched** or **Matched** (if there is a matched expense line) list.

## 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.

## Selecting a Tax Code

The **Total Tax Amount** fields only displays on the **Expense Line** screen if **Tax Auditing** is enabled in the **Accounting Company Settings** of Deltek Vantagepoint.

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

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

## Expense Location

You can only change the expense location on the **Add Tax Code** and **Edit Tax Code** screens if you have appropriate rights.

The options for this field include all expense locations that have been set up for an expense category of a particular line. If the **Expense Location** field is not applicable, the field does not display.

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

## Add a Tax Code to an Expense Line

You can select the appropriate tax code for your expense line.

**To add a tax code:**

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

## Edit a Tax Code on an Expense Line

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

**To edit a tax code:**

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

You can delete a tax code on an expense line if you have rights to edit tax codes for the expense category.

**To delete a tax code:**

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**.

## Attach a Receipt

You can attach a receipt to an expense report using Capture Receipt, by taking a picture, or by using an image from the camera gallery.

**To attach a receipt**:

1. Select one of the following choices:

   ▪ Using **Capture Receipt** and taking a photo of the receipt, or by tapping  to select an existing image from the camera gallery.

   ▪ Tapping  to take a picture of the receipt, or by tapping  to select an existing image from the camera gallery.

Mobile Time & Expense resizes automatically any file attachment that exceeds 5 MB.

## Attach a Receipt using Capture Receipt

You can use your device's camera to capture receipts and attach it on your expense report.

**To attach a receipt using Capture Receipt:**

1. Tap , and tap **Capture Receipt**.

2. Perform one of the following:

   ▪ Focus your device's camera on the receipt, and tap the device's default camera button.

   ▪ Tap  to select an existing image from the camera gallery.

3. Perform any of the following on the captured or selected image:

- Tap  to crop the image.

- Tap  to rotate the image.

- Tap  to delete the image.

- Tap **Stitch More** to capture or select another image.

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

- Tap **Try Again** if you want to discard the previous image and capture a new one.

4. Tap **Submit.**

5. On the Add Receipt to Expense Report screen, perform any of the following:

   - Tap **Create New Expense Report** to display the New Report screen. Enter or select necessary details, and tap **Done**.

     > **Note:** If ICR is enabled, Mobile Time & Expense automatically scans and analyzes the captured image, maps the captured data, and automatically populates the matched fields.

   - Tap **Add to Existing Expense Report** to display the Expense Report screen.

   - Tap an existing expense report to which you want to attach the receipt. The **Line** field on **Edit Line** is updated.

   - Tap **Done**.

     > **Note:** If you do not have an existing expense report, Mobile Time & Expense displays the following message: "You have no existing in progress expense reports to add this receipt. Would you like to create a new expense report instead?" Tap **Create New Expense Report** or tap **Cancel**.

   - Tap **Cancel** to close the Add Receipt to Expense Report screen and go back to the Expense Report screen.

## Attach a Receipt and Associate with an Expense Line (with ICR enabled)

With ICR enabled, you can capture an image of a receipt and then attach it to an expense line, or use it to overwrite a receipt in the expense line.

**To attach and associate a receipt with an expense line (ICR enabled):**

1. On **Edit Line**, tap  in the **Receipt** field.

> **Note:** If a receipt is already attached to the expense line, or if there is an existing value in the expense line, Mobile Time & Expense displays a warning message. Tap **Overwrite** to attach new receipt image. Otherwise, tap **Cancel**.

2. Perform one of the following:

   ▪ Focus your device's camera on the receipt, and tap the device's default camera button.

   ▪ Tap  to select an existing image from the camera gallery.

3. Perform any of the following on the captured or selected image:

   ▪ Tap  to crop the image.

   ▪ Tap  to rotate the image.

   ▪ Tap  to delete the image.

   ▪ Tap **Stitch More** to capture or select another image.

     > **Note:** Stitch is used to append additional pages of a receipt and is not intended for use with multiple different, unique receipts.

   ▪ Tap **Try Again** if you want to discard the previous image and capture a new one.

4. Tap **Submit.**

5. On **Receipt**, Mobile Time & Expense automatically generates the filename and the description of the receipt following this format: **[Category/Description — Vendor name]**.

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

   > **Note:** You can still manually edit the description of the receipt.
   >
   > ▪ Mobile Time & Expense scans and matches the vendor only if it is listed in Vantagepoint and tax auditing is enabled.
   >
   > ▪ Mobile Time & Expense scans and matches the category (exact category or any category) with the user's own assigned group. If no match is found, Mobile Time & Expense searches the same category through the ALL group.
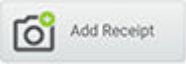
6. Tap **Done**.

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

## Attach a Receipt and Associate with an Expense Line (with ICR disabled)

You can attach a receipt and associate it to an expense line without using the ICR feature.

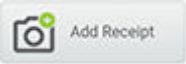**To attach and associate a report with an expense line (ICR disabled):**

1. On **Edit Line**, tap  in the **Receipt** field.

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

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

4. On **Picture**, tap **Next**.

5. If you need to retake the picture, tap ; otherwise, skip this step.

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

7. Tap **Done**.

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

## Select an Existing Picture from Camera Gallery (with ICR disabled)

You can select an existing receipt picture from your camera gallery and associate it with an expense line even if the ICR feature is disabled.

**To select an existing picture (ICR disabled):**

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 with this receipt automatically, toggle the **Associate with new lines** switch to **ON**.

6. Tap **Done**.

## Select an Existing Receipt for an Expense Line

You can select and attach a receipt picture and automatically associate it to an expense line.

**To select an existing receipt:**

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**.

# Expense Approval

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** expense reports.

> **Note:** This section only applied to users assigned as approvers.

## View the Expense Report List for Approval

As an administrator, you can access and view expense reports for approval.

If you have multiple companies in your database, expense details display according to the currency and expense settings of the employee's home company.

**To view the 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. Mobile Time & Expense displays all entries containing the part that you enter. To clear your search, tap ⊗.

## Review an Expense Report

As an administrator, you can review an expense report before approving it.

**To review an expense report:**

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.

- 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.

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- 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

As an administrator, you are authorized to approve an expense report.

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

**To approve an expense report:**

1. On **Expense Approval**, tap an employee whose expense report you want to approve.
2. Take one of the following actions:

   - Tap .

   - Tap , and tap **Approve with Comment**.

# Rating and Feedback

You can now provide a rating or send a feedback message in Mobile Time & Expense.

An in-app review is now included in the Mobile Time & Expense application. The in-app review becomes available after you upgrade to a newer release or major release of the Mobile Time & Expense application. You are only prompted one time to submit a rating for the Mobile Time & Expense app, after you submit a timesheet or expense report.

You can also send feedback at any time using the **Provide feedback** button, which is available on the Mobile Time & Expense menu screen. When you tap **Provide Feedback**, the message that opens in your default email application is automatically populated with the following details:

- **To**: [Vantagepoint@deltek.com](mailto:Vantagepoint@deltek.com)
- **Subject**: Mobile T&E (version) Feedback

# Settings

Use the information in this section to configure Mobile Time & Expense on your device.

## Set a Default View

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

**To set a default view:**

1. Tap ▤, and tap **Settings**.

2. On **Settings**, tap **Open In** and tap an option.

3. Tap **Done**.

## Change Your Password

Passwords help ensure system security. You can change your password at any time.

You can also follow the steps below if your current password expired or your administrator requires you to change your password on your next login.

**To change your password:**

1. Tap ▤, and **Settings**.

   Proceed to step 3 if you need to change an expired password or you are required to change your current password upon logging in.

2. Tap **Change Password**.

3. In **Old Password** on the Change Password screen, enter your current password.

   If you are using the Multi-Factor Authentication feature, you must enter the verification code before changing your password.

4. In **New Password**, enter your new password.

   If your system administrator established password policies, your new password is accepted only if it meets those requirements.

5. In **Confirm Password**, enter your new password again.

6. Tap **Save**.
   The next time that you log in, you must use the new password.

## Change PIN

You can change the PIN code of Mobile Time & Expense anytime.

**To change your PIN:**

1. Tap ▤, and tap **Settings**.

2. On **Settings**, tap **Change PIN**.

3. On **Change PIN**, enter your current password, and tap **Done**.

4. Enter your PIN, and reenter it to confirm.

## Modify the Server URL

You modify the server URL of Mobile Time & Expense through **Settings**.

**To modify the server URL:**

1. Tap ![icon], and **Settings**.

2. On **Settings**, tap **Forget Me on this Device**.
   All options and favorites are lost.

3. On the login screen, tap **Server URL**.

4. In **Server**, tap ![icon] 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 Mobile 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.

**To set the number of displayed search results:**

1. Tap ![icon], and tap **Settings**.

2. On **Settings**, tap the **Search Result Display By** field.

3. Scroll through the list to select a value.

4. Tap the value, and tap **Done**.

## Enable or Disable Fingerprint or Face ID Authentication

You can enable or disable the fingerprint or face ID feature in Mobile Time & Expense.

**To enable or disable fingerprint or face ID authentication:**

1. Tap ![icon], and tap **Settings**.

2. Use the **Using Fingerprint/Face ID** slider to enable (**ON**) or disable (**OFF**) the fingerprint or face ID authentication.
   If the **Using Fingerprint/Face ID** has been disabled, you are prompted to enter a four-digit PIN code and the **Change PIN** button is available.

## Set the Number Entry

You can always set the appropriate number/time entry in Mobile Time & Expense.

**To set the number entry:**

1. Tap ▤, and tap **Settings**.

2. On **Settings**, tap the **Number Entry** field.

3. Tap **Use Picker** or **Use Keypad**.

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

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

4. Tap **Done**.

## Set the Default Start and End Times

You can set default start/end times for meals in Mobile Time & Expense.

**To set the default start and end times for meals:**

1. Tap ▤, and tap **Settings**.

2. On **Settings**, tap the **Start time/End time** field or **Meal start time/Meal end time** field.

3. On **Start time/End time** or **Meal start time/Meal end time**, enter time using your keypad or scroll through the time picker to find the appropriate time.

4. Tap **Done**.

## Configure Mobile Time & Expense Settings

You can configure the Mobile Time & Expense settings for a better user experience.

**To configure the** Mobile Time & Expense **settings:**

1. Tap ▤, and tap **Settings**.

2. On **Settings**, modify any of the following settings:

   - **User ID**: To change the current user, tap **Forget Me on this Device**, and log in again. All options and favorites are lost.

   - **Database**: To change the database to which you are currently logged in, tap **Forget Me on this Device** and then log in again. All options and favorites are lost.

   - **Open In**: Tap this to select whether the application opens on the Timesheet Periods, Current Timesheet, Expense, or Capture Receipt screen.

- **Using Fingerprint/Face ID**: Slide to turn on or off the fingerprint or face ID authentication. If you turn off this option, you are prompted to enter a four-digit PIN code and the **Change PIN** button becomes available.

- **Display Non-Working Days**: Toggle this setting to determine whether or not non-working days are displayed on **Timesheet**.

- **Search Result Display By**: Tap this 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 Mobile Time & Expense to copy lines (except for hours) from a submitted timesheet to the next timesheet, with the **New** status.

- **Number Entry**: Tap this field and then select one of two settings:

    - **Use Picker**: Select this setting to use the iOS standard picker for entering time. All time displays in hours and minutes.

    - **Use Keypad**: Select this setting to use a number keypad when entering numbers in hour fields. All time displays in hours, using a decimal.

- **Help**: Tap to access the Mobile Time & Expense help. You can also access the help by tapping , and tapping **Help**.

- **Privacy Policy**: Tap to view the Legal Notices and Privacy Statement information page of Deltek.

- **About**: Tap to view the device and operating system information, which includes the following:

    - Device Type

    - Operating System

    - User Agent Name and Version

    - Application (Native App or Web App) Version

    - Deltek T&E Server Version

    - Web Service Version

    - Core System Version

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

- **Change Password**: Tap this button to change your current password. On the Change Password screen, enter your old password and then create your new password. This button is not available if you are logging in using Single Sign-On (SSO) or Windows Authentication.

- **Change PIN**: Tap this button to create a new PIN code. On the Change PIN screen, enter your password and then create the new PIN. This button is not available if the **Using Fingerprint/Face ID** option is turned on.

- **Start time/End time**: Tap this option to set the default start and end times, by day. You can enter time using your keypad or scroll through the time picker to find the appropriate time. These values display automatically on **Timesheet Hours**.

- **Meal start time/Meal end time**: Tap this option to set default start and end times for meals. You can enter time using your keypad or scroll through the time picker to find the appropriate time.

- **Log Out**: When you close Mobile 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 and you must then 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 your details from the application, including options and favorites. Your user ID, password, and database are required the next time that you log in.

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

## 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

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