Deltek

TE10 Mobile Time End User Training

June 18, 2019

Agenda

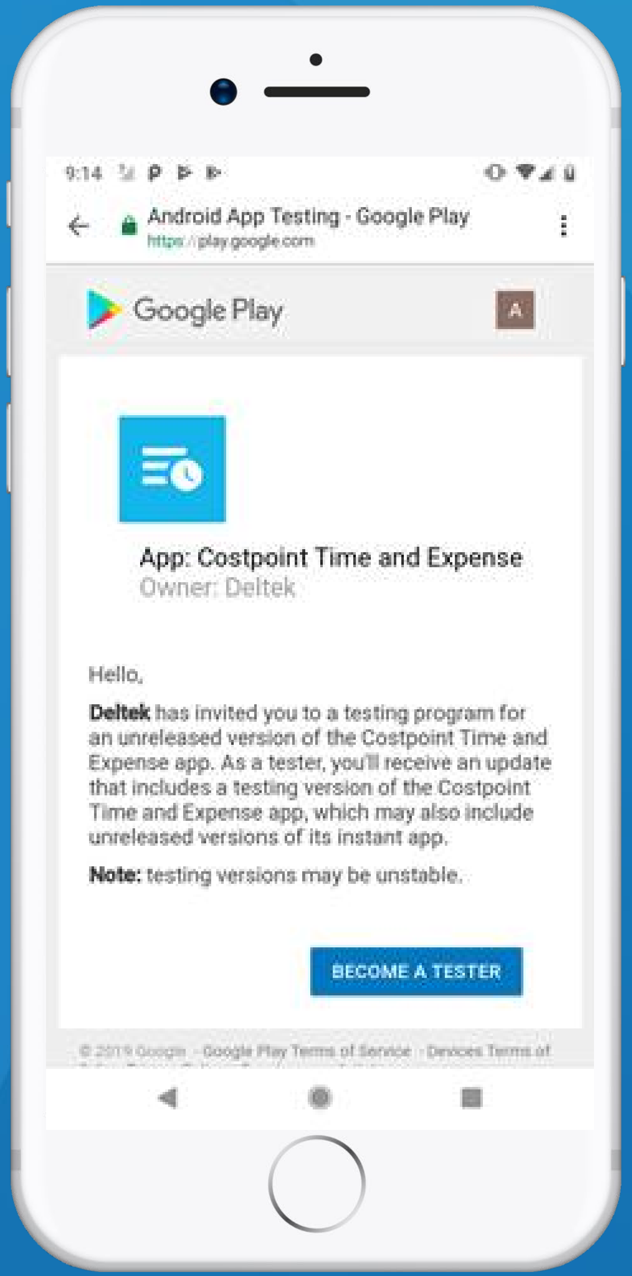
- Mobile App Feature Training

Feature Training

What's included in the release

User Download

- Download app from the Google Play or Apple app stores



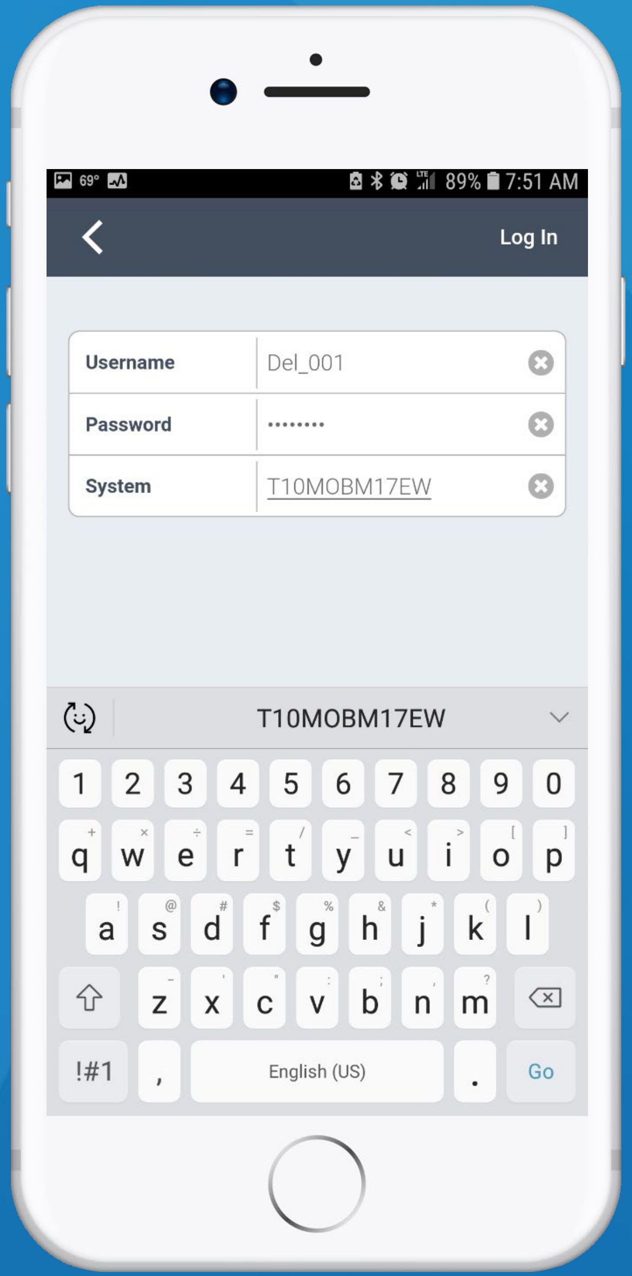
Server URL

- The user can type in the server URL or click on an email link to populate it

https://AZIMUTH-cp.deltekenterprise.com/DeltekTouch/Costpoint/TE/

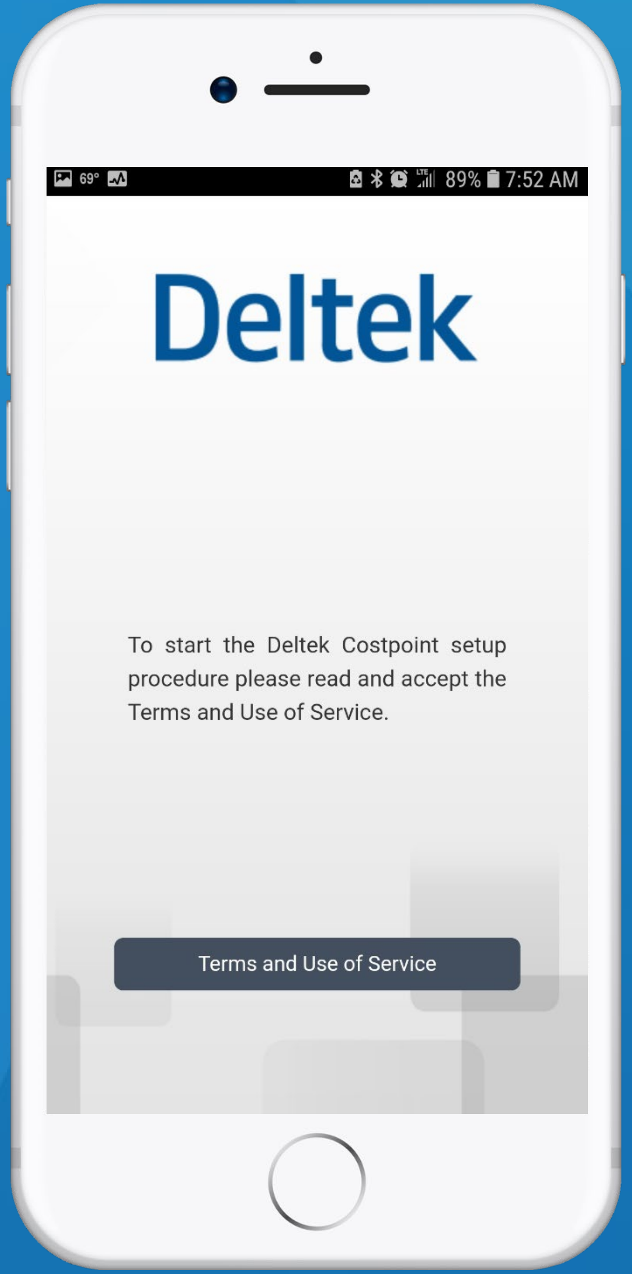
User Login Credentials

- Enter the User's Login Credentials to log into the mobile app
  - Login information is the same as what would be used in a browser
- Database, Active Directory and 2Factor Authentication are all supported
  - Single Sign-on is not supported in this version



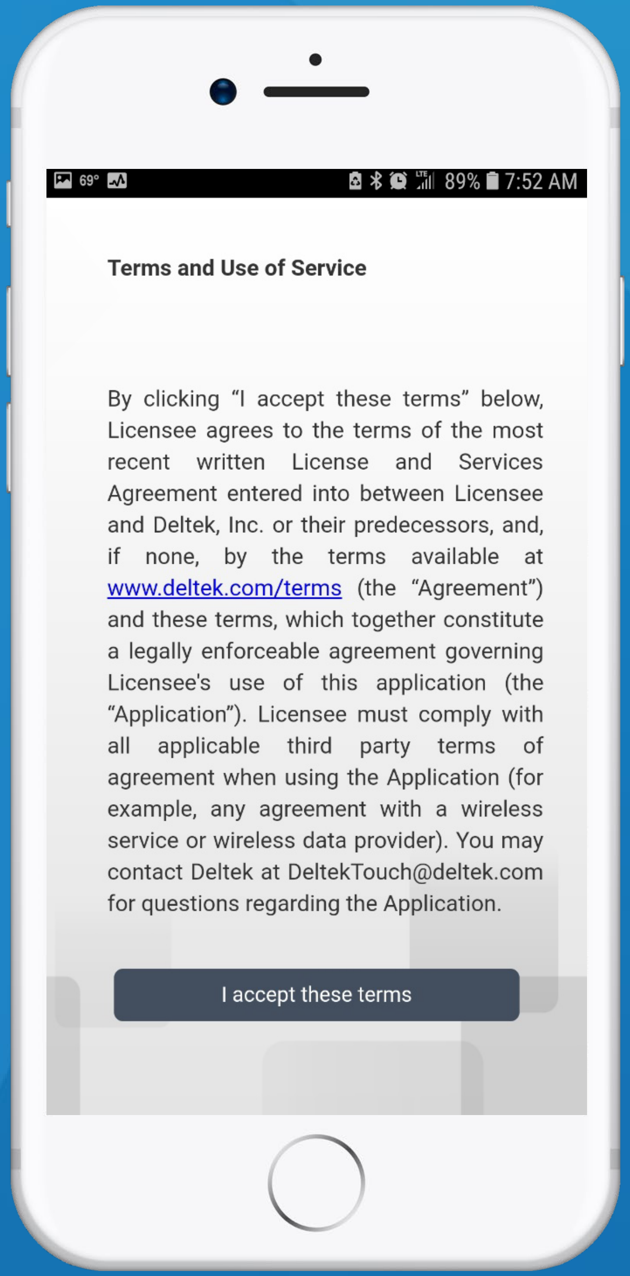
Terms and Use of Service

- User must click the Terms and Use of Service button



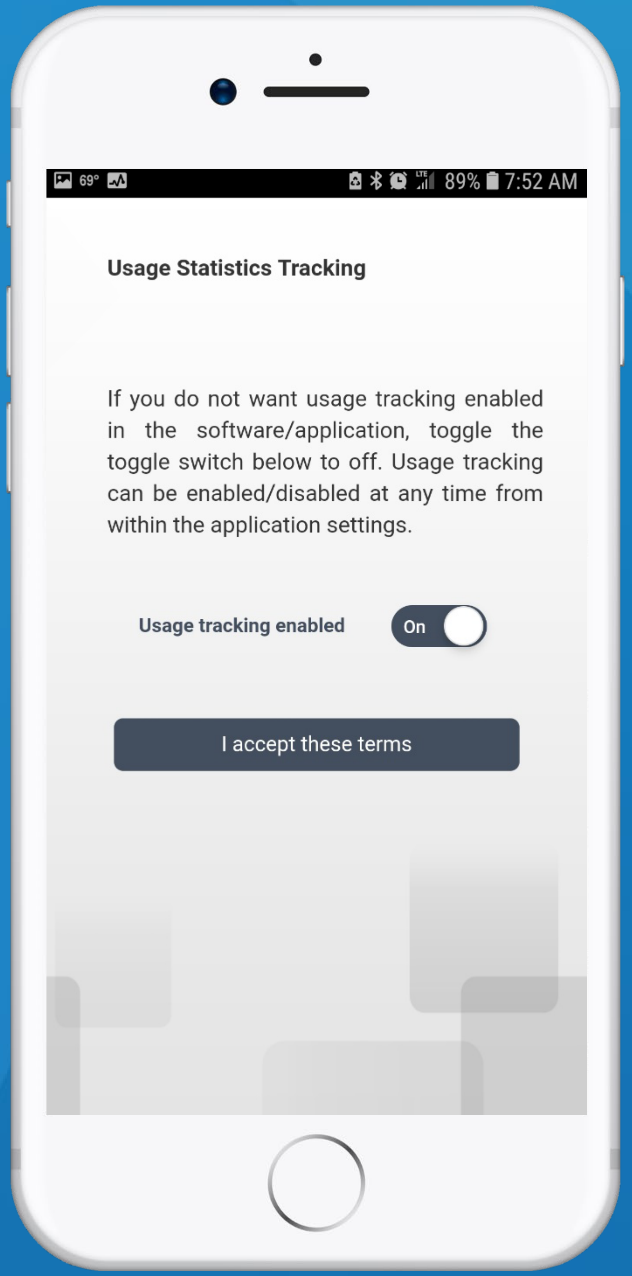
Terms and Use of Service

- User must accept the Terms and Use of Service



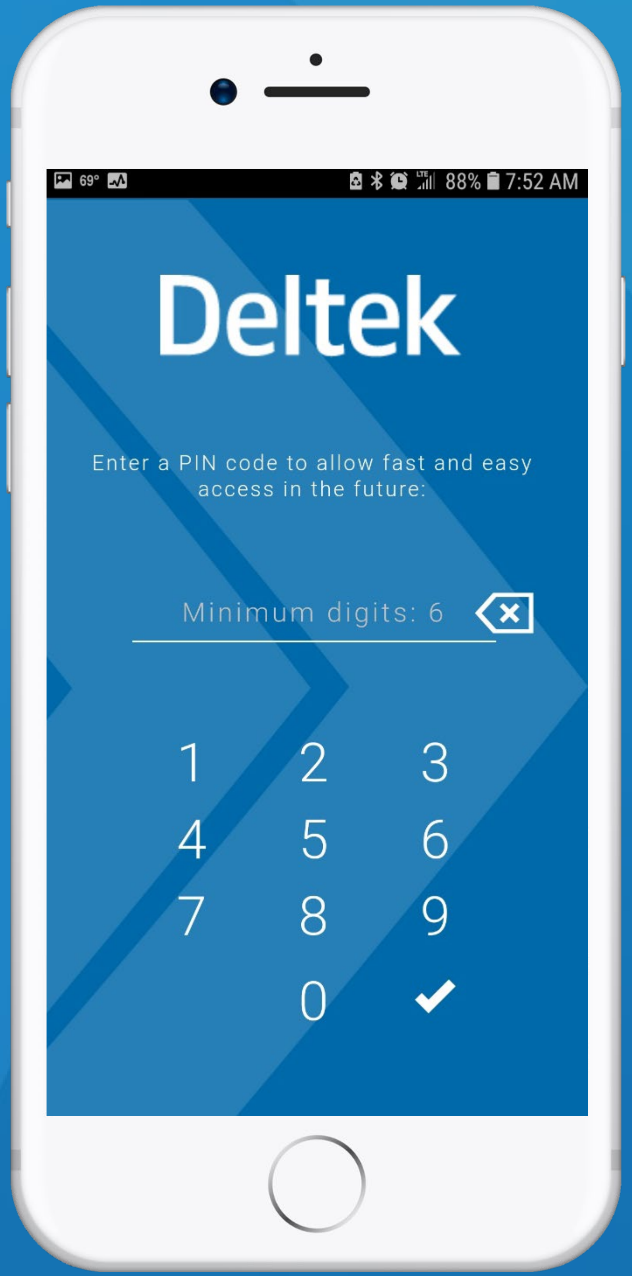
User Statistics

- User chooses to enable Mobile app usage tracking
  - This is only google software usage tracking and no user identification is used on this tracking
  - Default is On
  - User can chose to turn it off and no tracking will occur
- User must press the accept terms button after making a selection



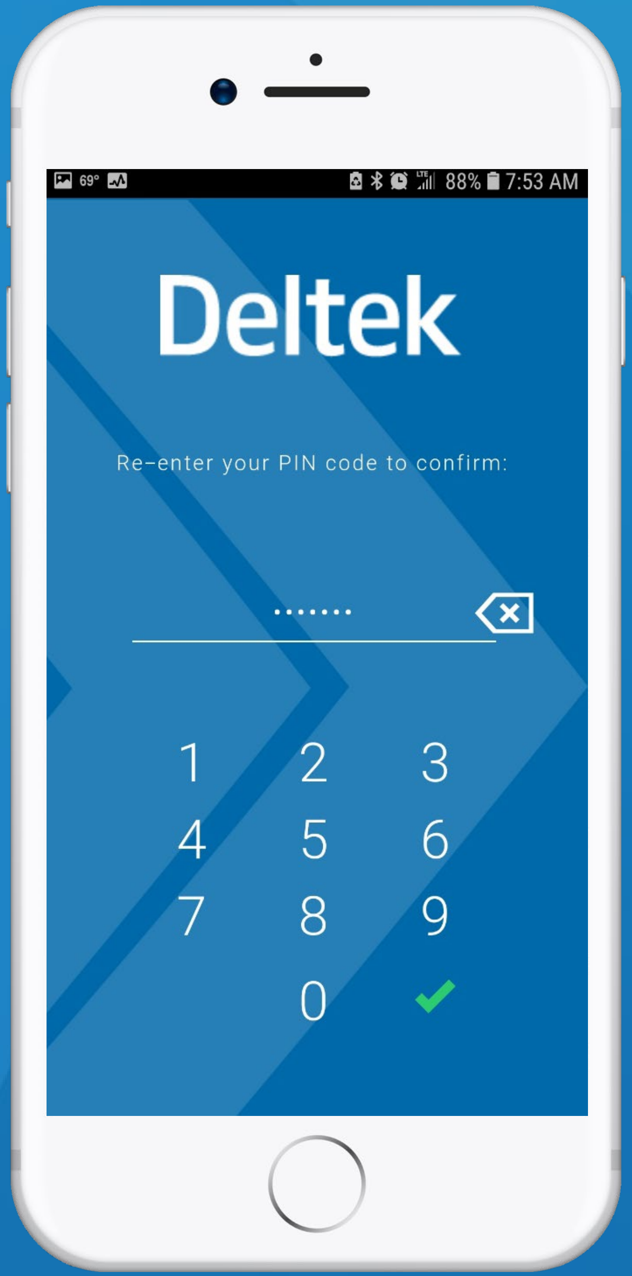
Create PIN

- The user is required to create a PIN code during initial install to be used to access the app in the future
  - The minimum number of digits is displayed in the Create PIN screen
  - Default minimum is 6 digits
- Once the PIN has been entered the user will click the check mark (it will be green)



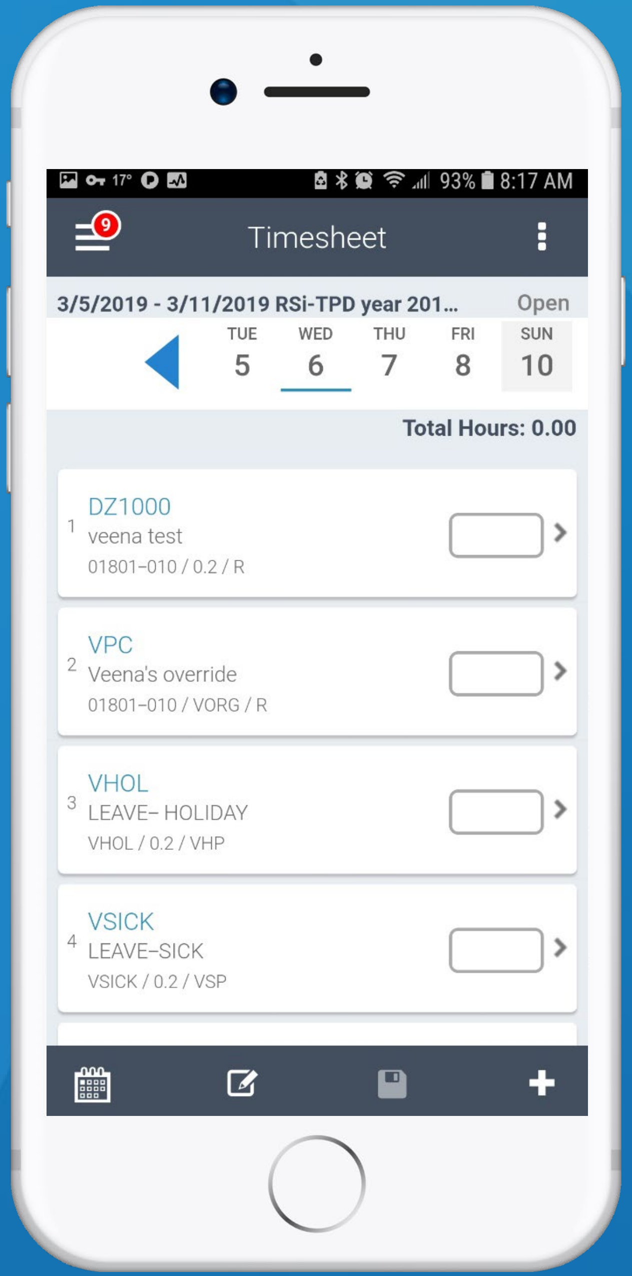
Confirm PIN

- The user will re-enter their PIN to confirm it
- Once complete they will click on the green check mark



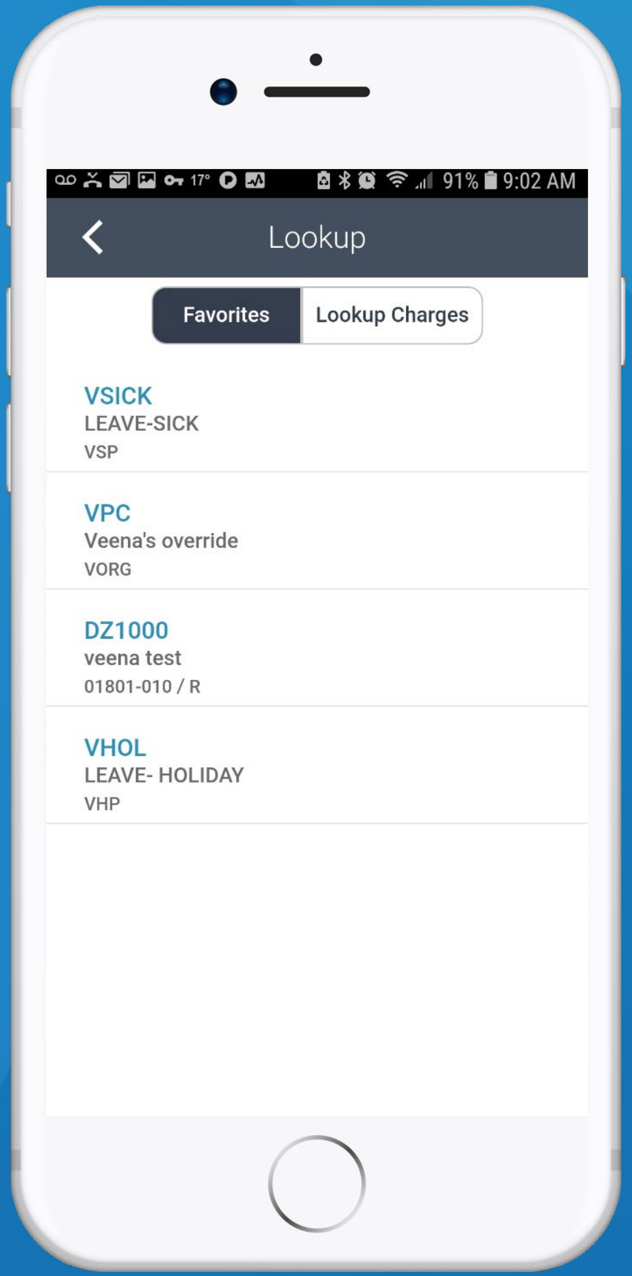
Mobile Time Entry

- Enter hours
  - Auto load charges from favorites
  - Lookup charges from favorites or charge tree
- Revise hours
- Review hours
- Functions not available with this version:
  - Time In/out or Start/Stop
  - Correcting Timesheets



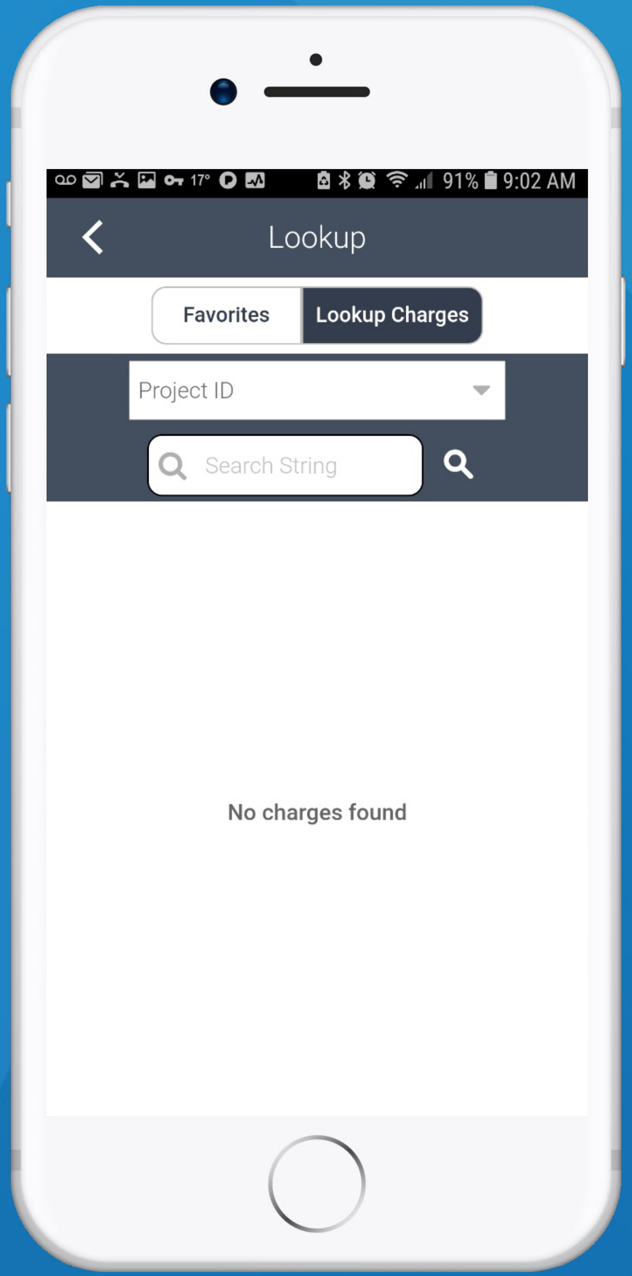
Lookup Charge Favorites

- Choose a Favorite



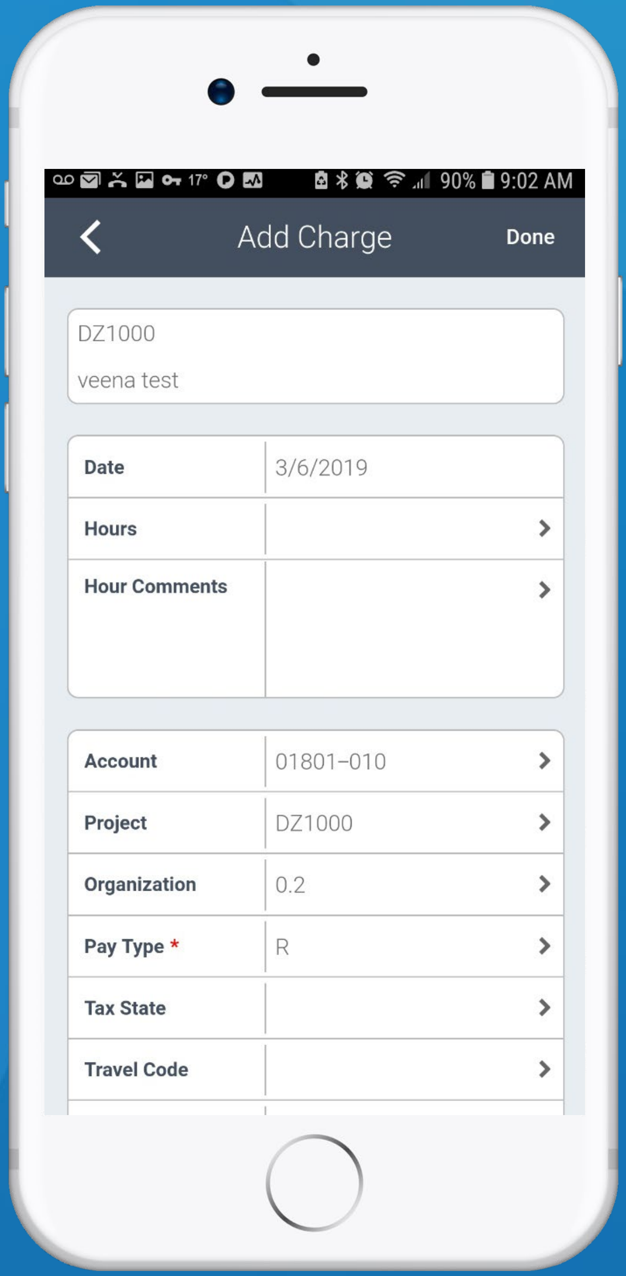
Lookup Charge

- Lookup a Charge that is not in Favorites



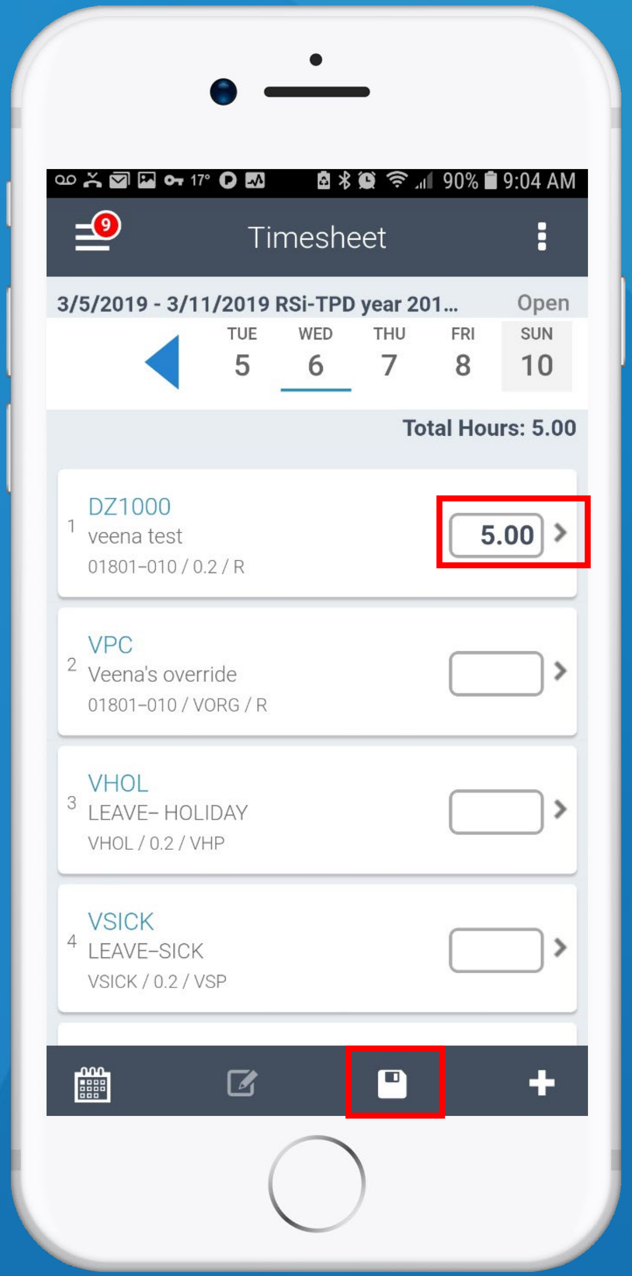
Add Charge

- Enter the additional required information
- Press Done



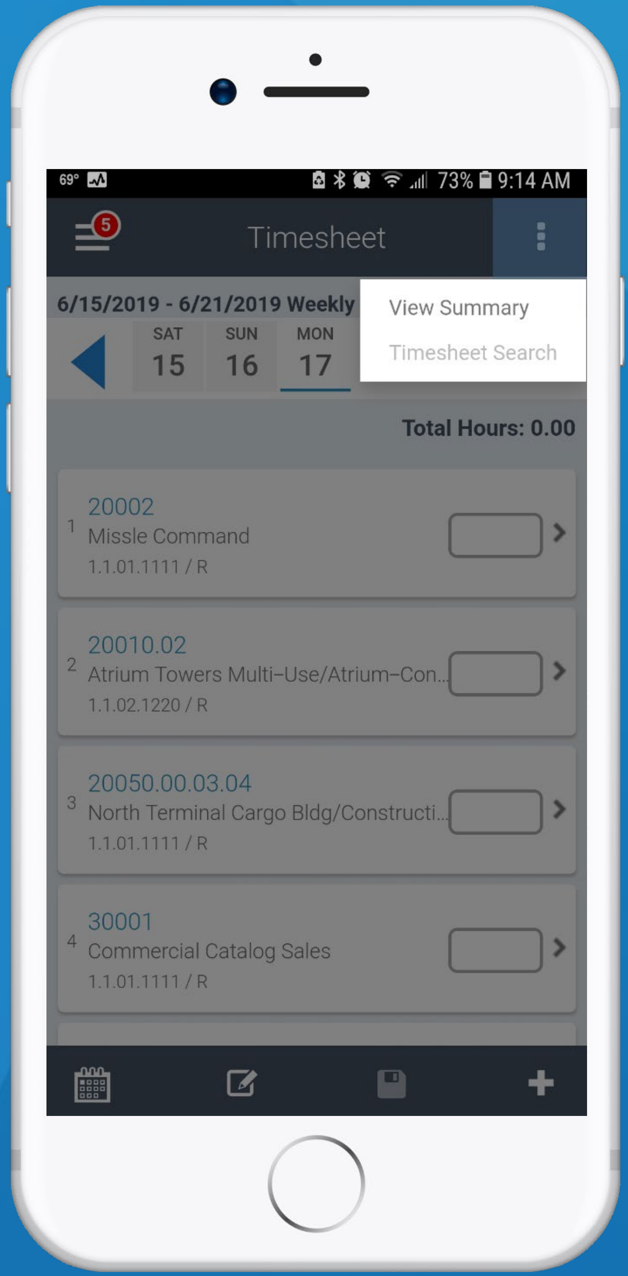
Quick Add Hours

- Click on the entry box in the row to add hours
- Enter the hours for the charge
- Click Save
- Click on the chevron to the right to edit or add information in the Add Charge screen



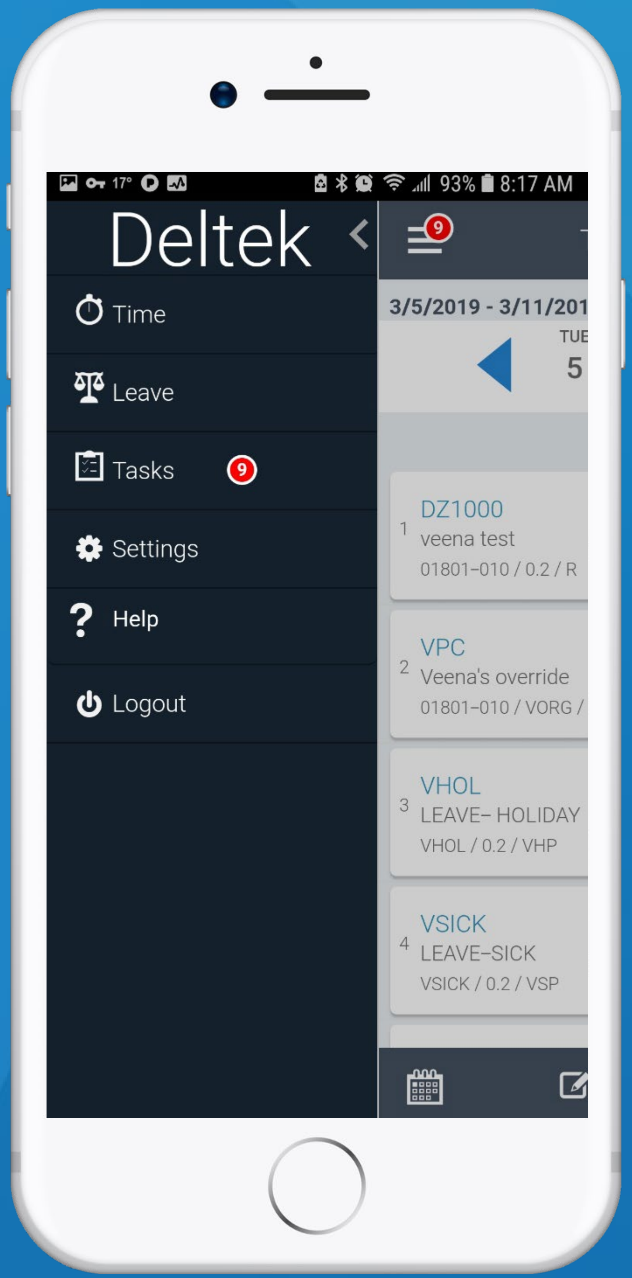
Summary View

- Employee users can View Summary
- Users that can view and approve other employees timesheets can View Summary and Search Timesheets



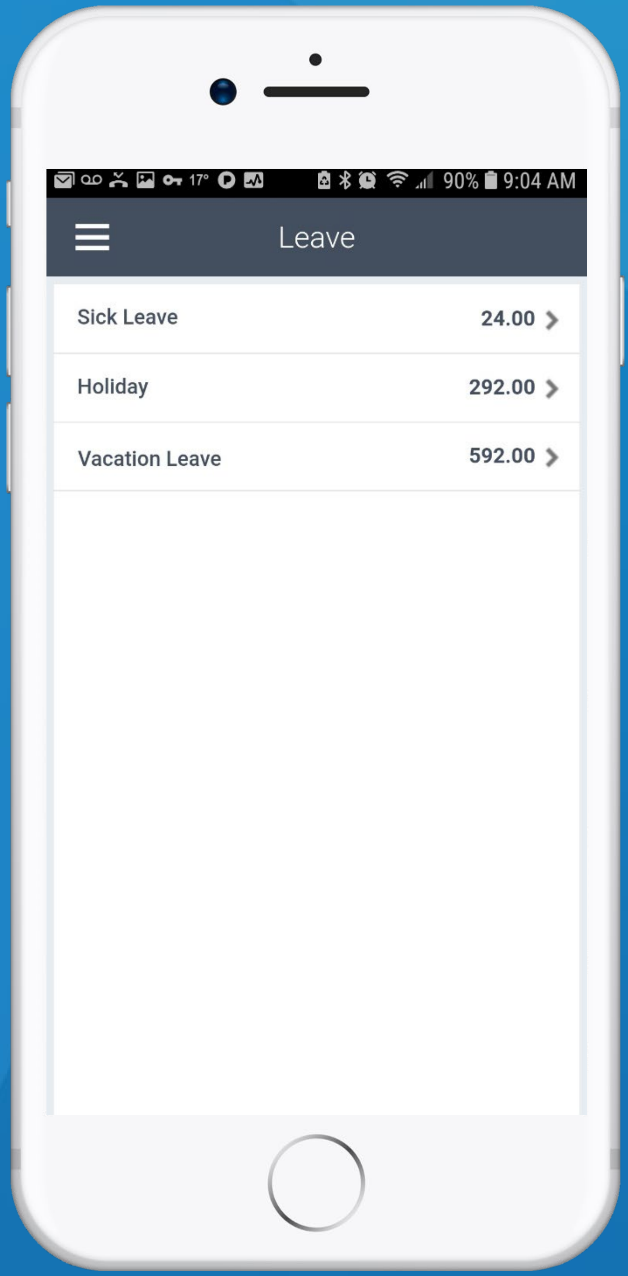
Navigation Menu

- Access Timesheet Screen
- Access Leave Balances
- Access Tasks
- Access Settings
- Access Help
  - Link to how to videos
  - Link to FAQs page
- Easy Logout



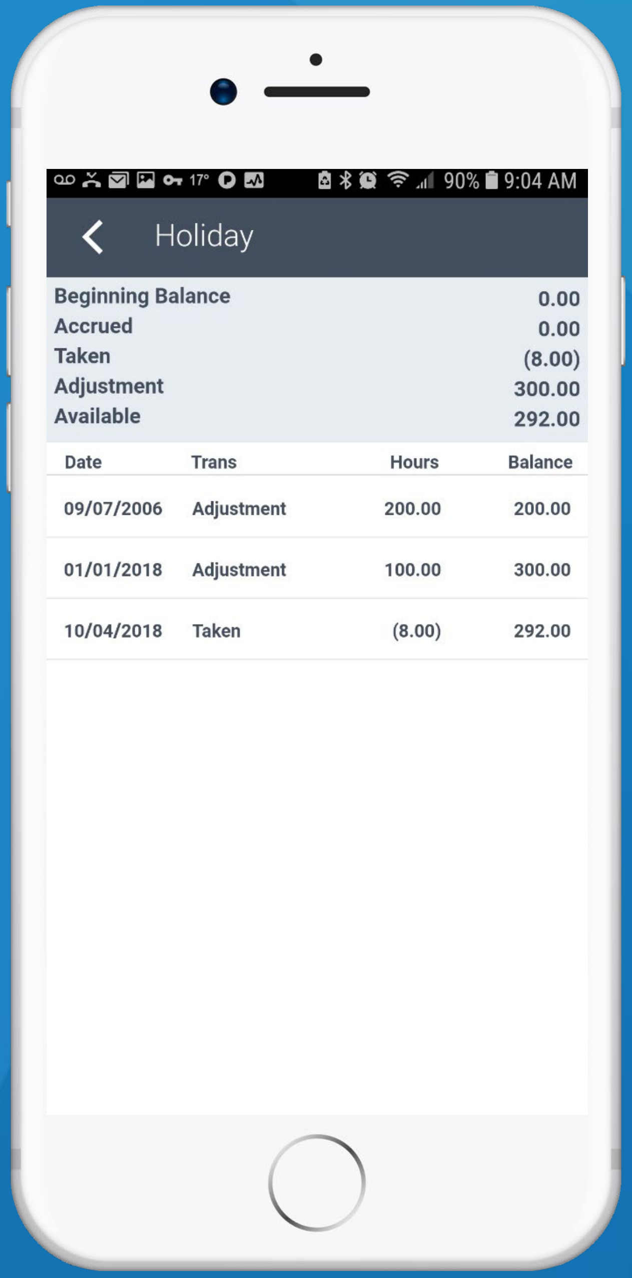
Leave Balances

- Each of the users valid leave codes are displayed
  - Balance for each is listed
- Click on the chevron to the right and access the detail transactions for the leave code



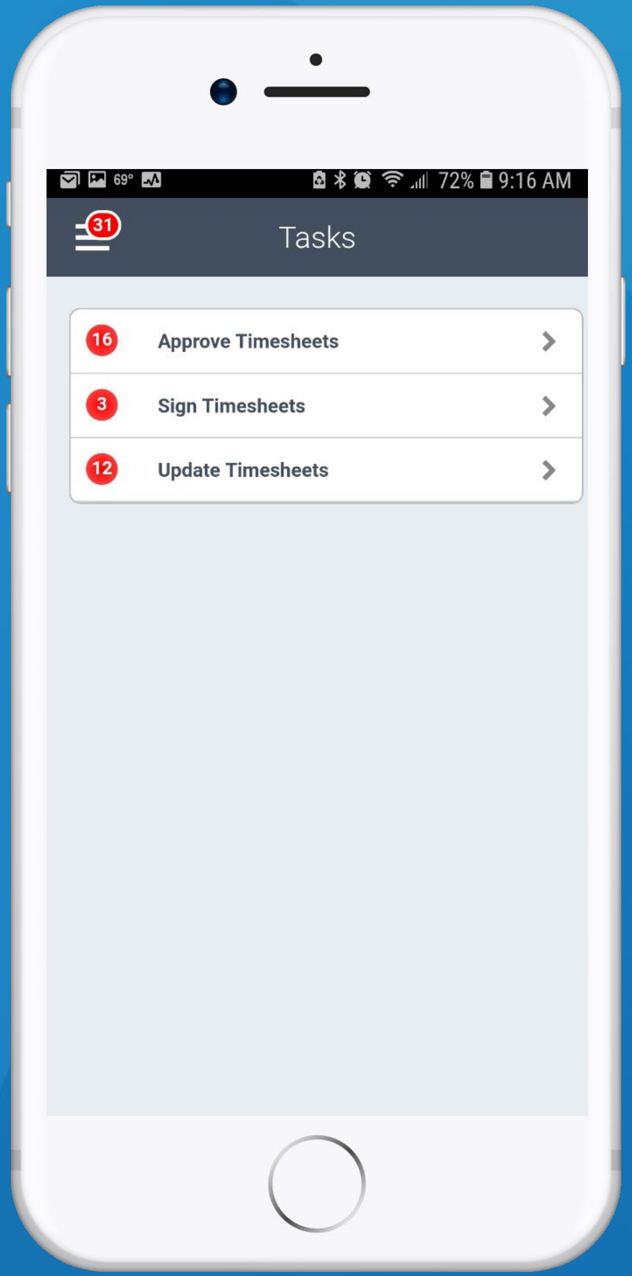
Leave Balance Detail

- Shows the activity for the leave code selected



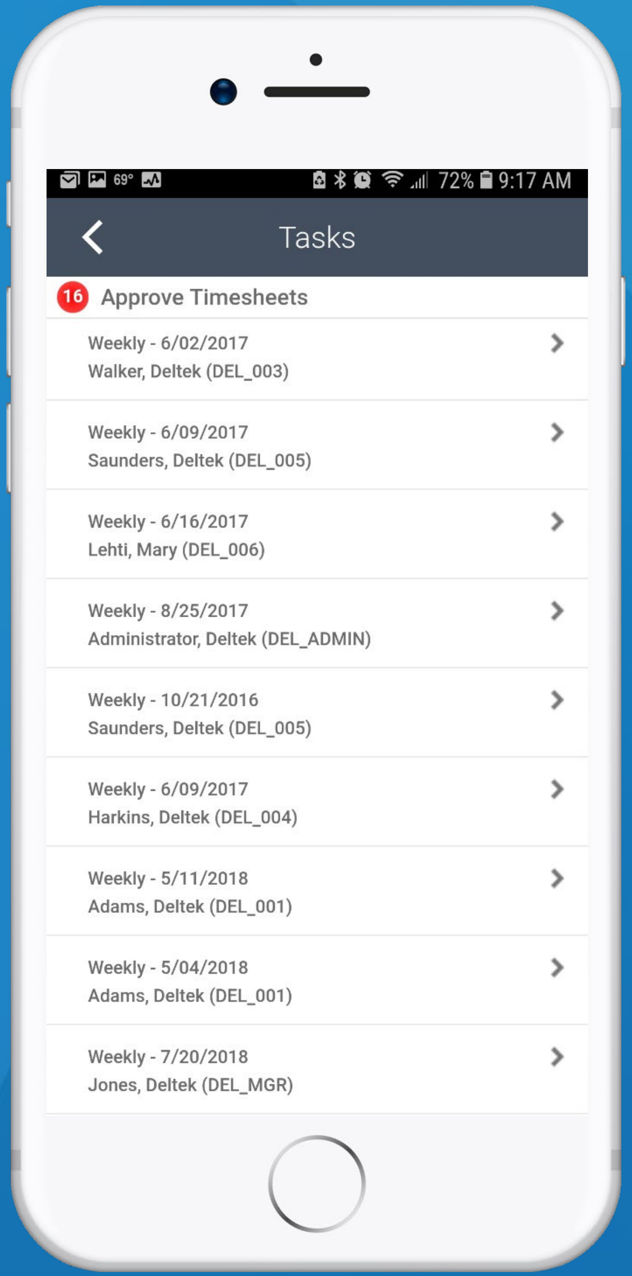
Tasks

- Visual notification when you have tasks to complete
- Quickly access and complete open pending tasks
  - Approve Timesheets
  - Sign Timesheets
  - Update Timesheets



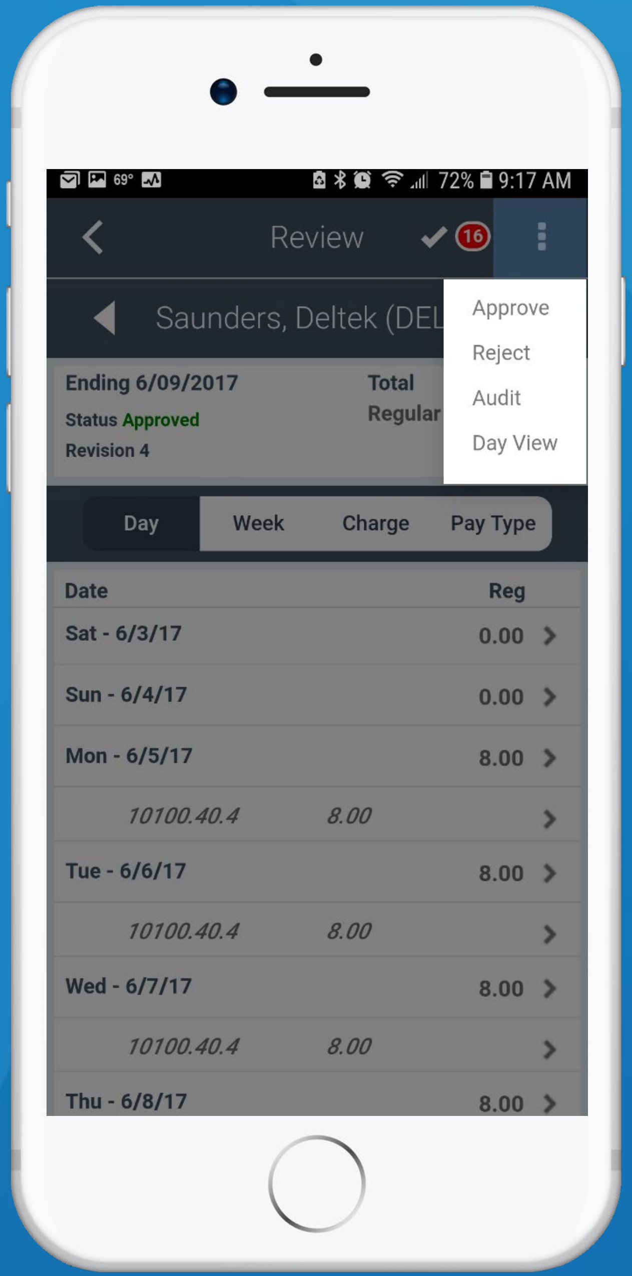
Approve Timesheets

- Approver can choose the period to approve



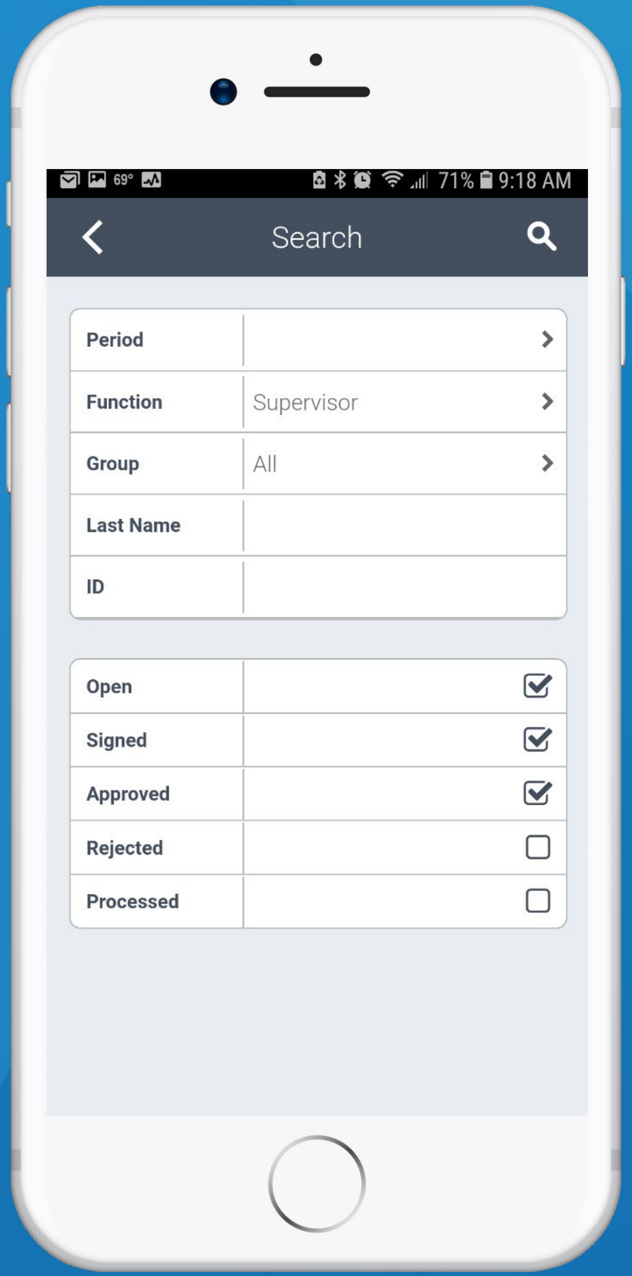
Approve Timesheet

- All timesheets load into the Approval Screen
- Options to Approve, Reject, Audit or Day View
  - Day View takes the user to the full timesheet
- Timesheets advance to next as actions are taken or through the navigation



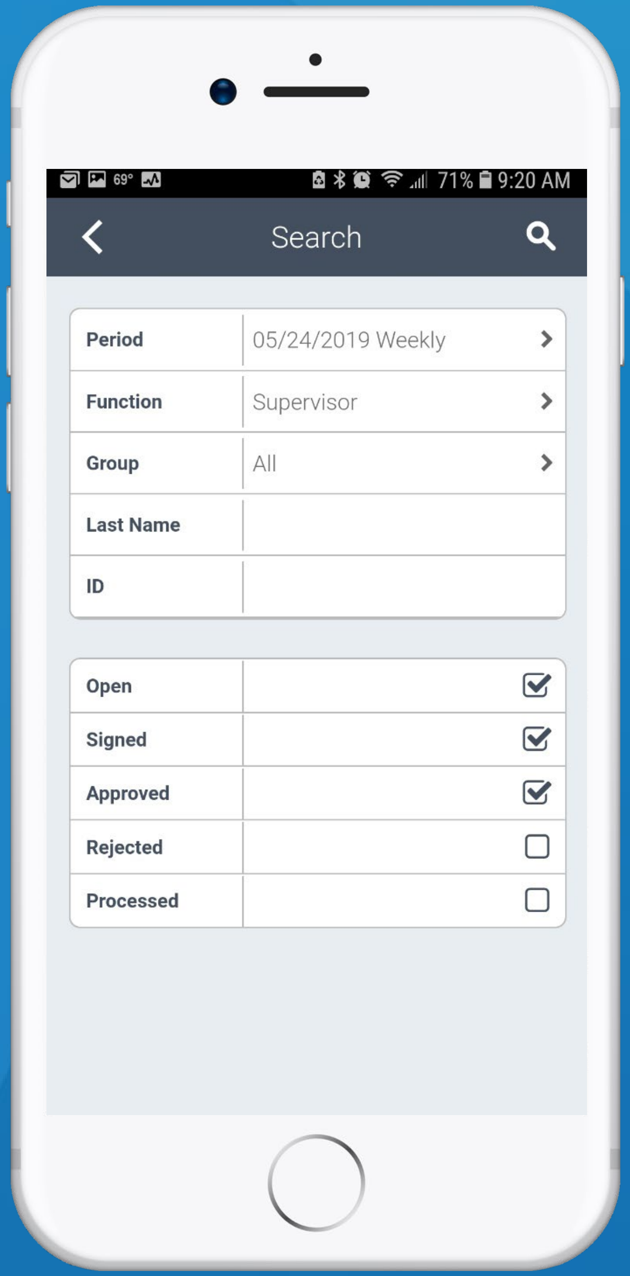
Search Timesheet

- Backup approvers or admins can search timesheets to review or take action



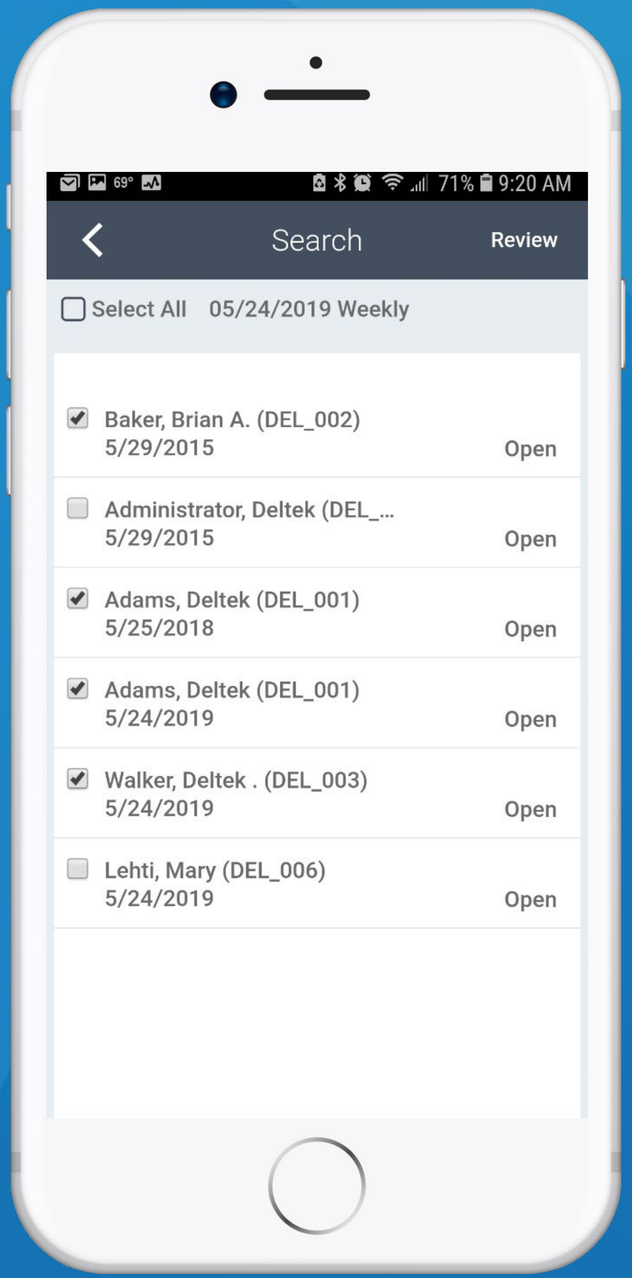
Search Period

- Select the period, function, status, etc. to filter the timesheets



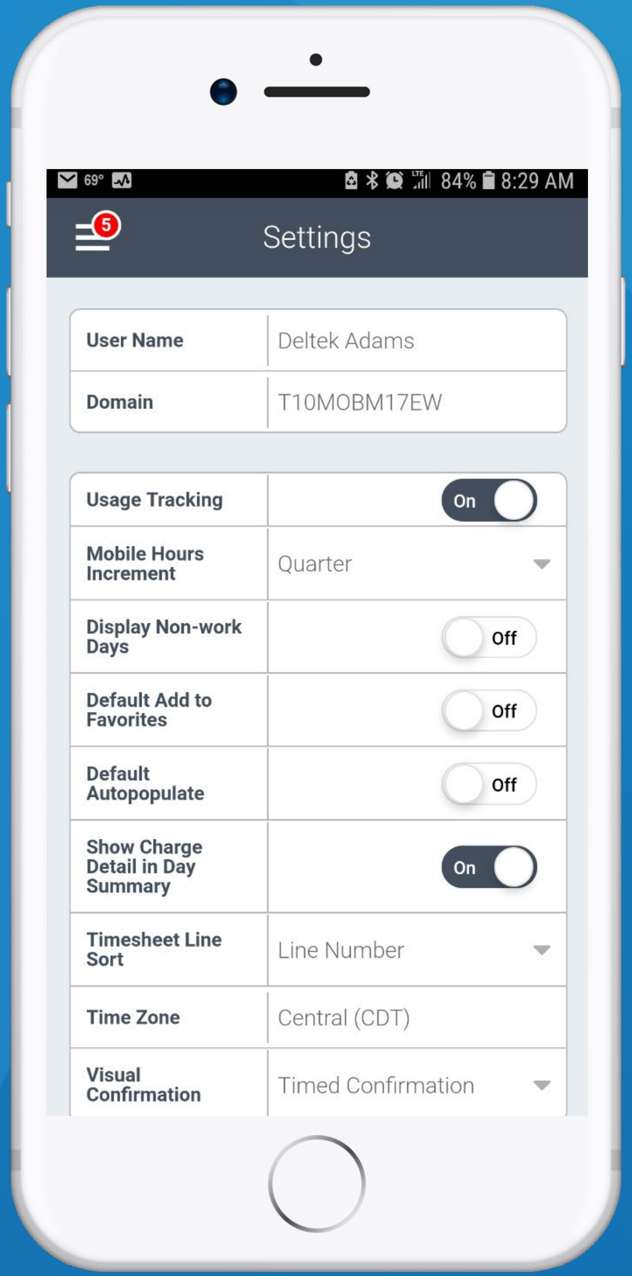
Select Timesheets

- Select the timesheets to review or take action on from the returned list



Settings

- Change Usage Tracking
- Set the mobile hours increment shown
- Choose to display Non-Work days
- Choose to default Add to Favorites
- Choose to default Autopopulate
- Choose to not show Charge Detail in Day Summary
- Change the Timesheet Line Sort
- View TimeZone
- Change the Visual Confirmation of messages



Settings Continued

- Access Help
- Access About
- Access Privacy Policy
- Change Pin
- Forget Me On This Device