ID #	Module	Name
100	Deltek Touch for Maconomy app	All sections

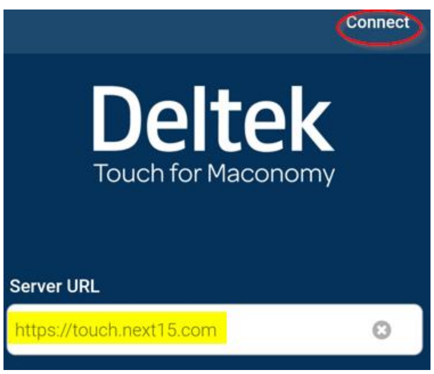
Deltek Touch for Maconomy Mobile app 

Test Scenario #1 – Installation, Logging in, Settings

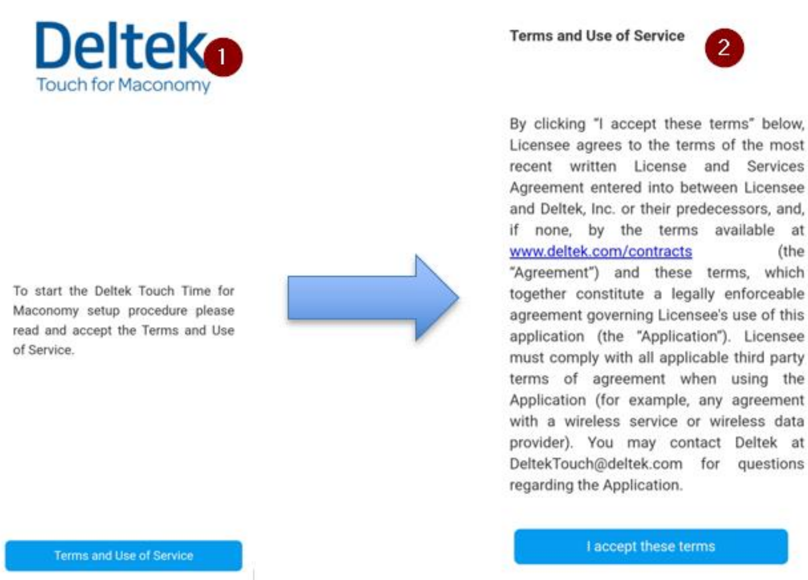
Deltek Touch for Maconomy (Touch) is the application which runs on various mobile applications. **Touch** application is the best way for on-the-go Maconomy users to not only submit and track time, expenses, purchase orders but also carry out various approvals.

If **Deltek Touch** is not yet installed: On the **Google Play** or **Apple App Store**, search for the application (**Deltek Touch for Maconomy**). Download and install the application by tapping the appropriate buttons. Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking (see below further instructions)

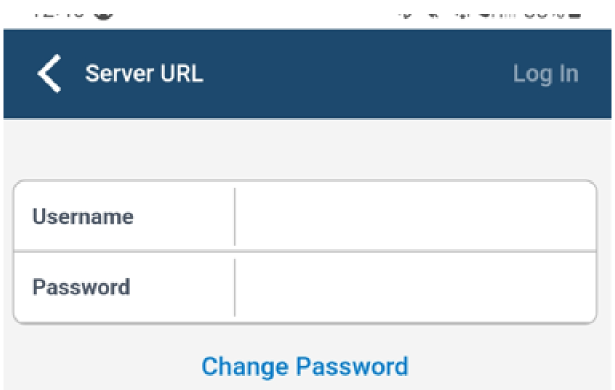
1. Once app is installed and opened, enter **Server URL**: https://touch.next15 and tap **Connect** at the top of the screen.



2. On your first log in, the application prompts you to accept the **Terms and Use of Service**. Tap the corresponding buttons.

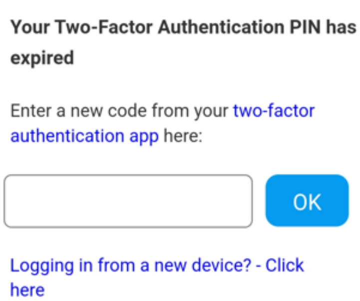


3. Tap the **Username** and **Password** fields to enter your details.



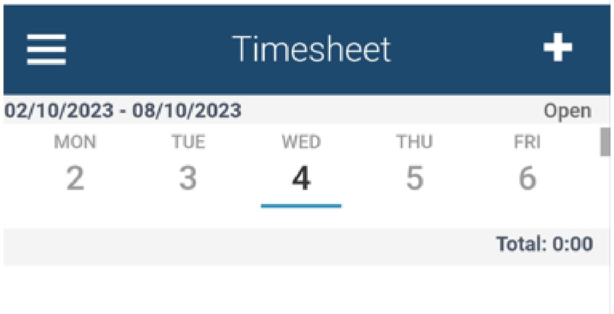
4. Tap **Log In**

5. Refer to a separate testscript/video “**000_Getting Started**” on how to configure and use **Multi Factor Authentication**. Once this is configured, below message might come up when your PIN expires or upon clearing your user details completely (when **Forget me on this device** is used)

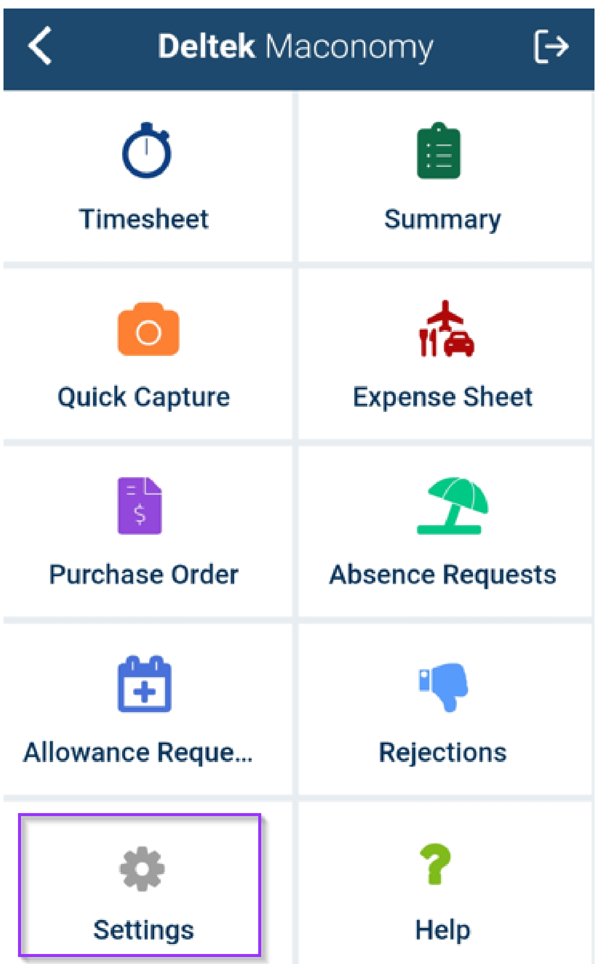


6. Enter a security **PIN** and re-enter it to confirm. Alternatively, you can use biometric authentication depending on your setup.

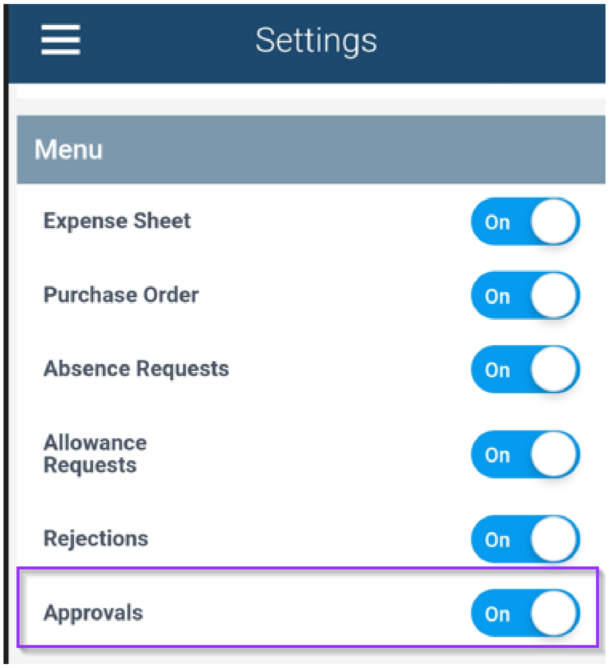
7. When you log in, you will be taken straight to your Timesheets (default view), to the current week.



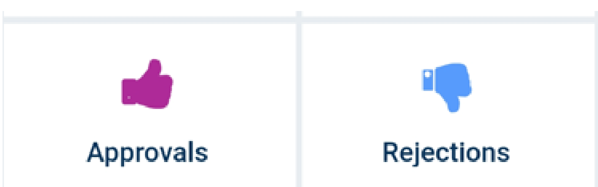
8. Click on the menu icon , top left corner to update your **Settings**
9. You will be taken to the main menu screen and there click on **Settings**



10. Go through all options and enable/disable based on your preferences, however, please ensure that “**Approvals**” is enabled.



11. You will then see both **Approvals** and **Rejections** options available in the main Menu

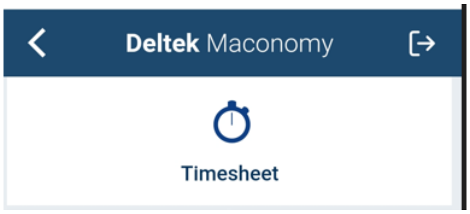


Approvals – section where you would go to approve various items where you are an approver

Rejections – section where you would go to see what’s been rejected for you. E.g., your Timesheets, Expenses. You will be able to see who rejected and why.

Test Scenario #2 – Timesheets

1. To update your Timesheets, from the main menu click on **Timesheets**



2. Click on calendar icon at the bottom of the screen to select a week which needs to be updated, tap on it to open.

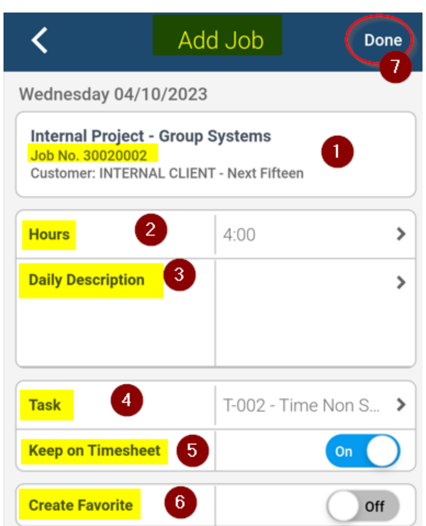
3. Click on top right corner to open a Find Job screen where you can search for a job number either by scrolling or entering a job number or name, customer name in the search field. Once job is found tap on it to populate.

4. Select **Task**, enter **Hours**, **Daily Description** (optional).

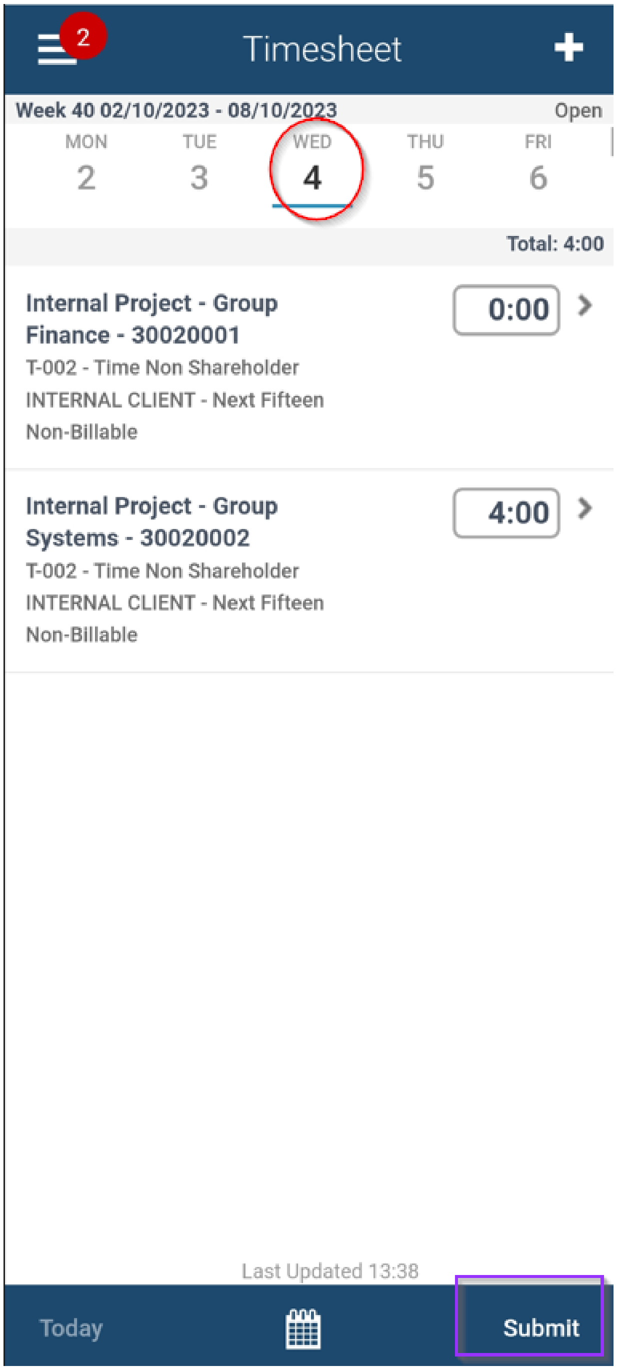
5. You can enable "**Keep on Timesheets**" so that this job and task combo could be carried forward into future weeks, hence saving you time to enter the same manually.

6. You can also enable **Create Favorite** which you then can access and update a particular Timesheets line from your Favorites instead.

7. Once all fields are updated, click on **Done**

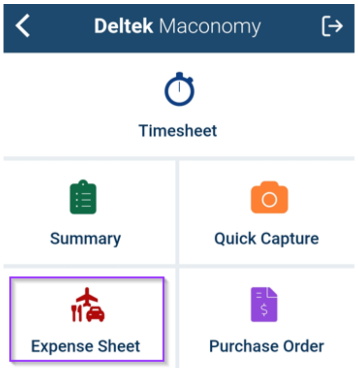


8. It will take you back to the main Timesheets screen where you will see what you've entered so far.
9. Once the whole week is completed, click on **Submit** button at the bottom of the screen. Based on your approval rules, it is either will be auto approved or will be sent to approvers to check and approve.



Test Scenario #3 – Expenses - manual creation

1. To create **Expenses manually**, from the main menu click on **Expense Sheet**



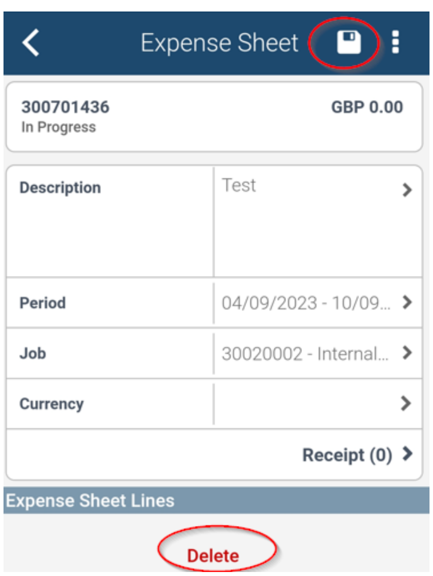
2. Click on top right corner to start the creation process which consists of **two steps**

3. **Step one**: create a header where you can enter the following:

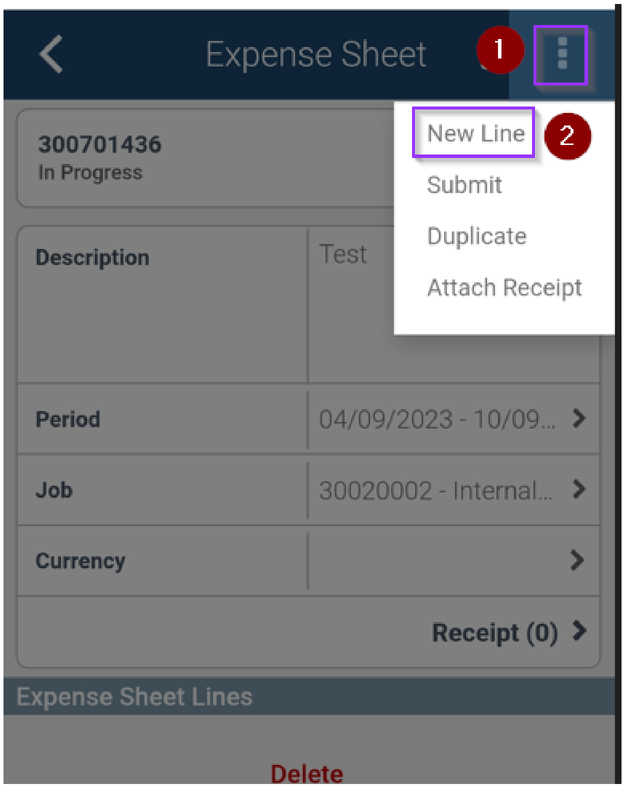
- **Description** of the Expense
- **Period** (optional) – start and end data of your expenses
- **Job** – this field can be updated with a job number if all your receipts belong to just one job, however, if you incurred cost for different jobs then this field can be left blank
- **Currency** – leave blank, will default to your company's currency

Click on save icon to create a blank expense which we will update as part of Step two

Note: you also have a Delete button available in case you need to delete



4. Navigate to the top and click on to expand the menu. Click on **New Line** to enter task (specify what type of cost incurred+ amount

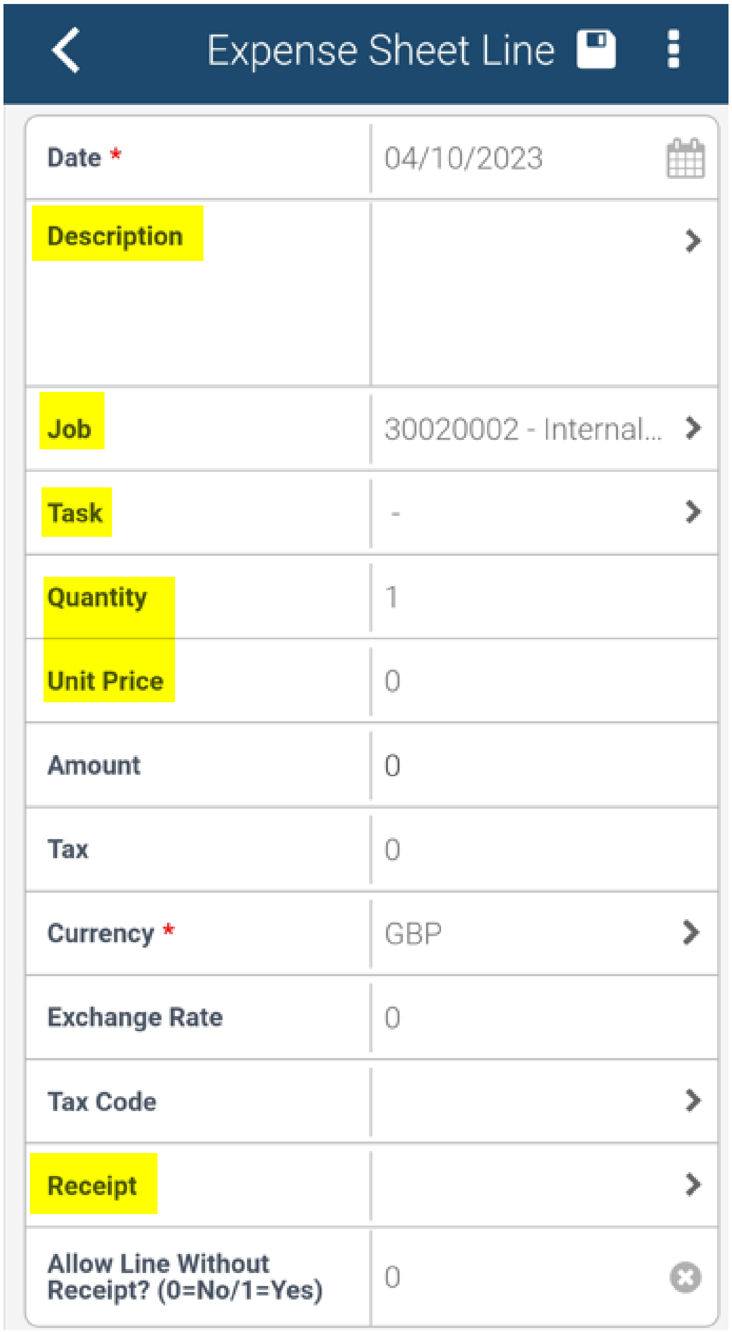


5. **Step two**: create and update lines

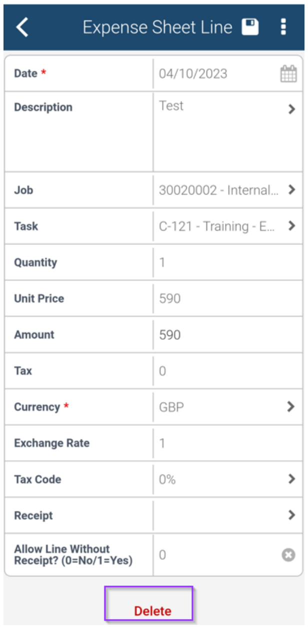
<u>Enter the following</u>:

- **Description –** describe what cost you are claiming
- **Job** (will be populated if it was entered as part of Step one)
- **Task** – tap and select a task
- **Quantity** – defaults to 1, update if necessary
- **Unit Price** – amount you are claiming/cost incurred
- **Receipts** – tap on this field to attach a receipt to the line

Once completed, navigate to the top and click on save icon to save and create a line

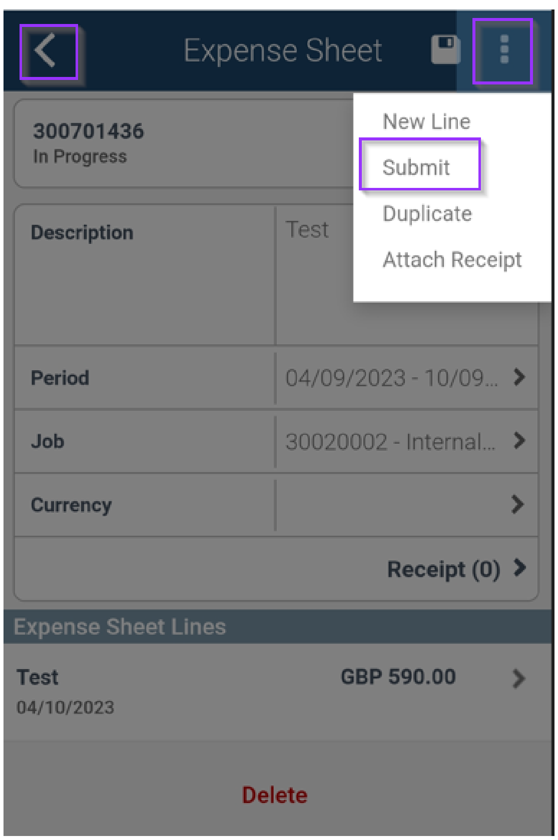


6. Once line is saved, you will have a Delete option available

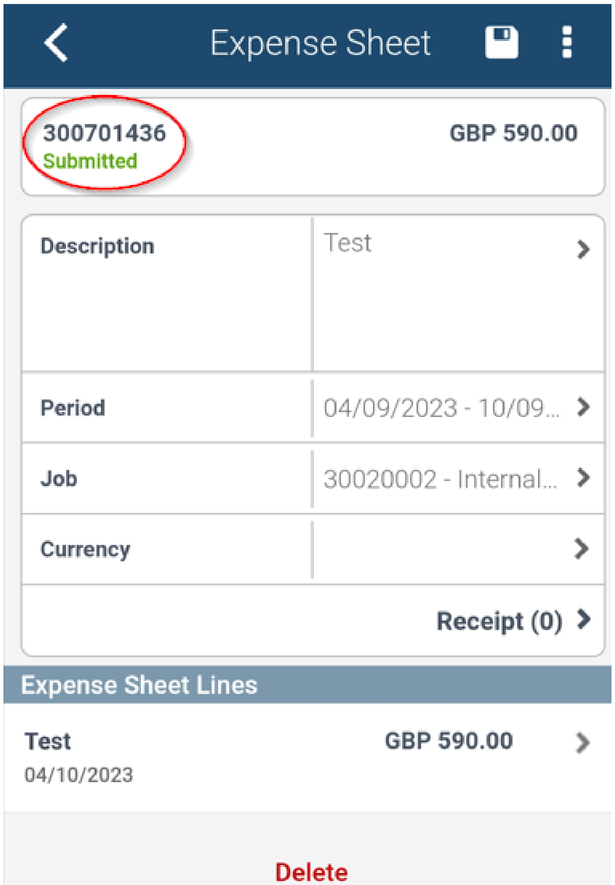


7. Click on at the top of the Expense Sheet to go to the Expense where you can see all expenses details + all lines you created for it

8. When Expense is completed, navigate to the top click on and tap on **Submit**



9. Once expense is submitted, you will see a Submitted status underneath the expense sheet number. The status will change to Approved once it's been approved.

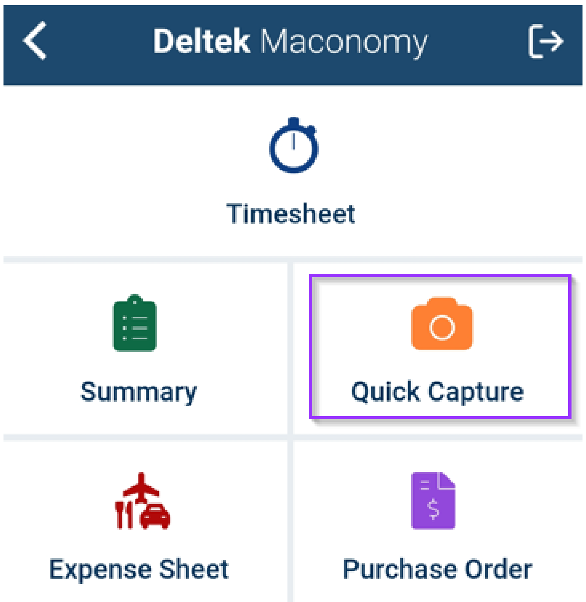


10. It will be sent to the relevant approvers based on your approval rules you have in place.

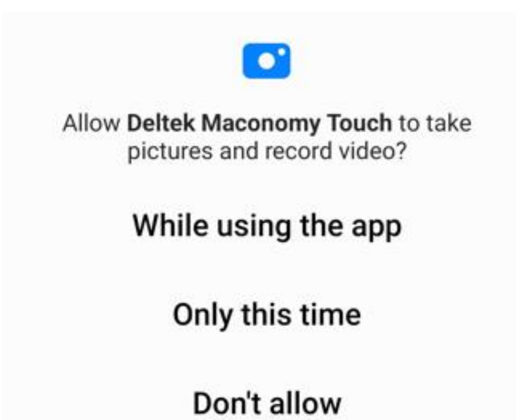
Test Scenario #4 – Expenses - Quick Capture

With **Quick Capture** you can take a photo of a receipt using your device's camera and then attach it to your either existing expense sheet or create a new one.

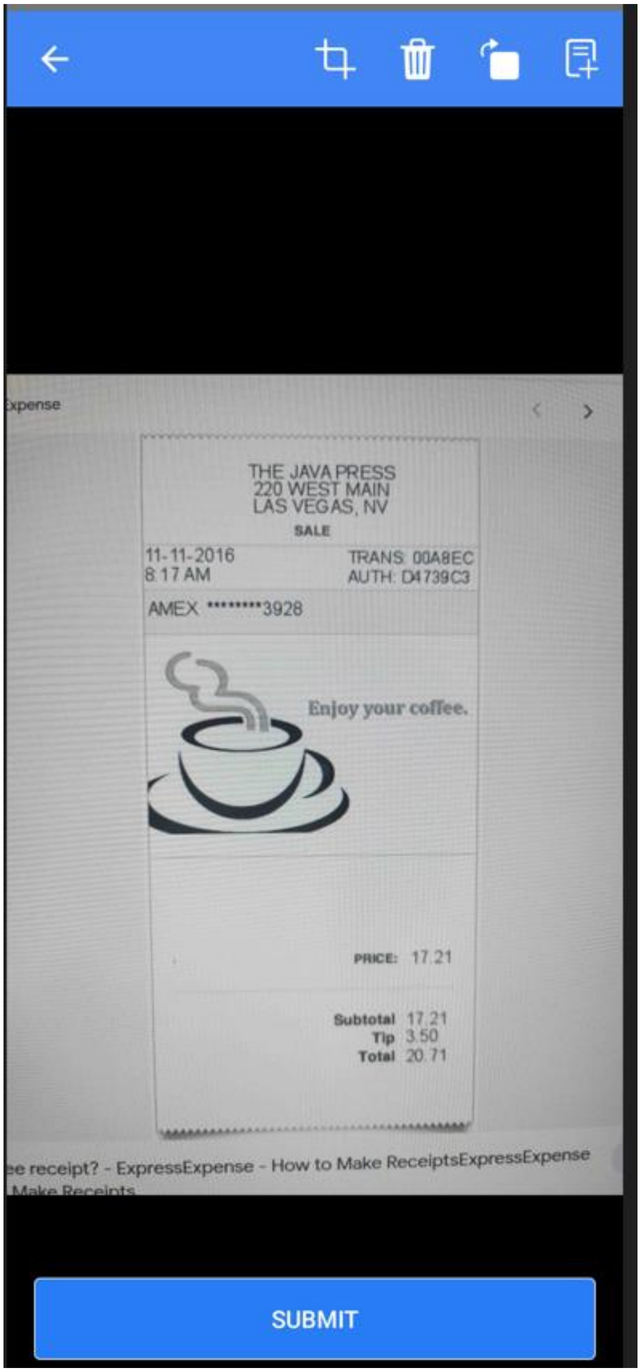
1. To create **Expenses using Quick Capture** functionality, from the main menu click on **Quick Capture**



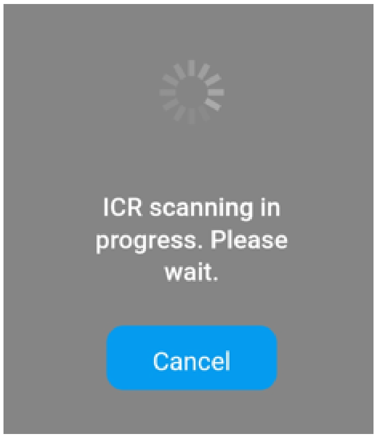
2. The camera on your device will be opened, you might click on one of the **Allow** options first, if a message like below comes up



3. Take a picture of your receipt and then click on Submit

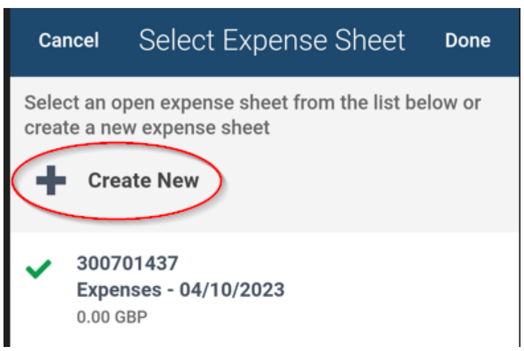


4. Briefly you will see this message, as an ICR scanning is processing your receipt.

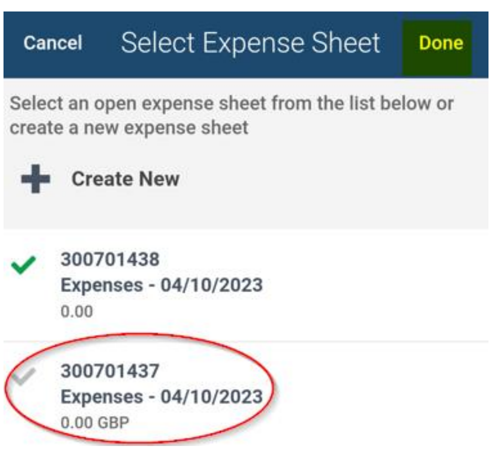


5. Once scanning is complete, you will be taken to the **Expenses** page where you can either create a new expense and the receipt will be automatically attached, or you can select an open, already created expense and it will attach the receipt based on your selection

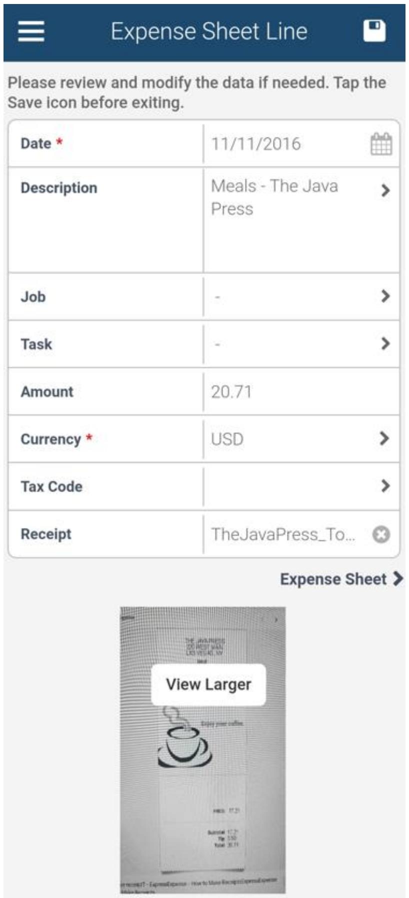
6. To create a new expense, click on **+Create New**



7. A new expense will be created and will appear at the bottom on the Expense Sheet screen. Click on **Done**



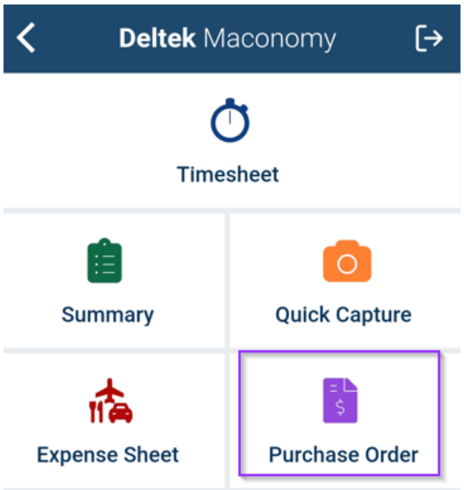
8. You will be taken automatically to your newly created expense, straight to the **Expense Sheet Line** where you will need to update all details and submit as per **Test Scenario #3,** and you will see your receipt attached



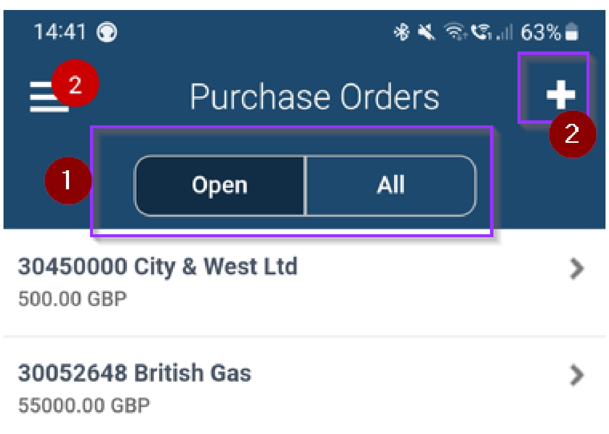
9. To attach more receipts to this Expense, repeat above **Steps 3 to 5** and then instead of selecting New expense, click on your existing one, which will be available and visible on that screen. It will create a new **Expense Sheet Line** within that Expense and attach your receipt to that line.

Test Scenario #5 – Purchase Orders

1. To create **Purchase Order**, from the main menu click on **Purchase Order**



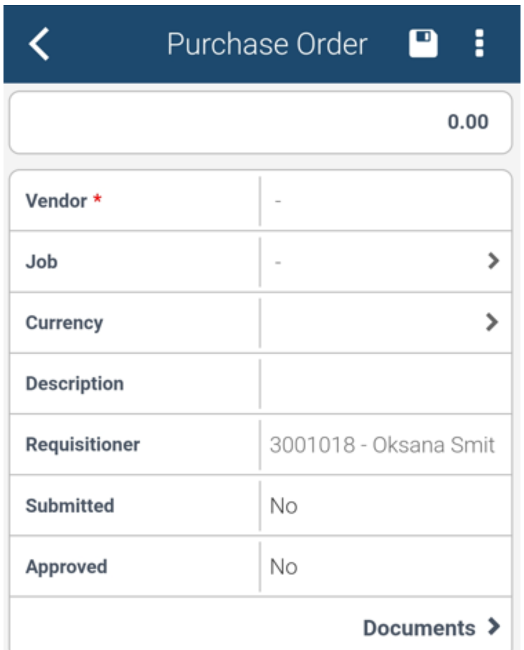
2. You will be taken to Purchase Order (PO) home screen, where you can change your view to see only Open or All which will show you open and closed/approved POs



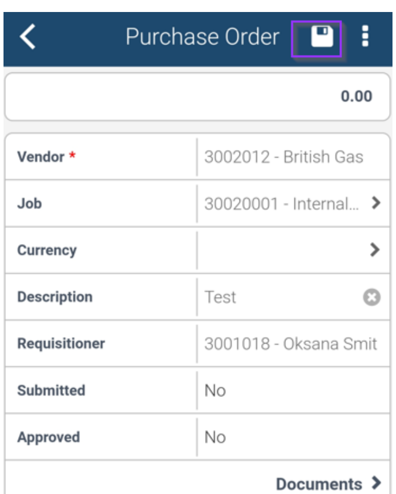
3. To create a new PO click on 

4. A **Purchase Order** creation view will come up. Update the following fields:

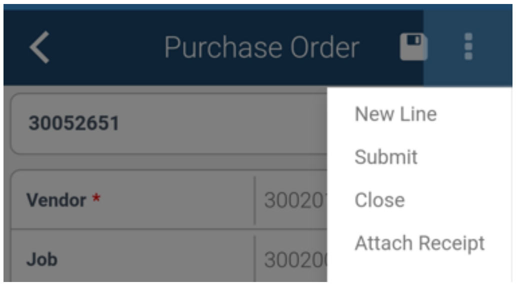
- **Vendor** – search and select a vendor/supplier. If you cannot find, please reach out to your Finance team to request to create that vendor
- **Job** – search and select a job number to which cost relates to/should be registered against
- **Currency** – leave blank, will be auto populated
- **Description** – provide a brief description of what services/goods you are purchasing
- **Requisitioner** – will be default to the PO creator
- **Submitted** and **Approved** will be automatically updated



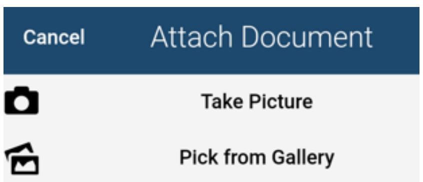
5. Once all fields are updated, click on save icon



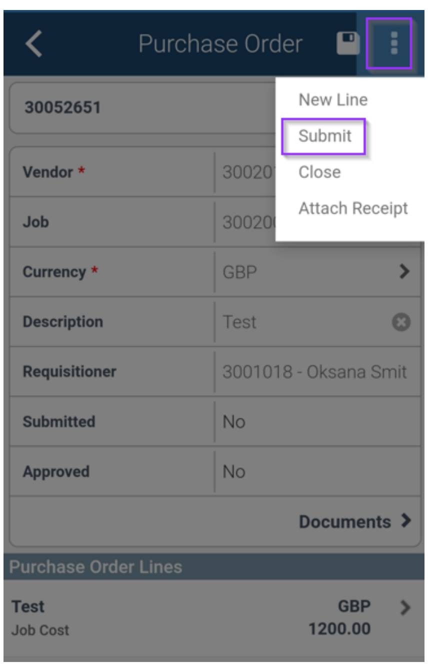
6. Navigate to the top and click on where you can add new line (if required), attach receipt (if you have any PO related document(s) to attached)



7. If you need to attach a document, click on **Attach Receipt** and you will be presented with two options, either take a picture or pick from Gallery



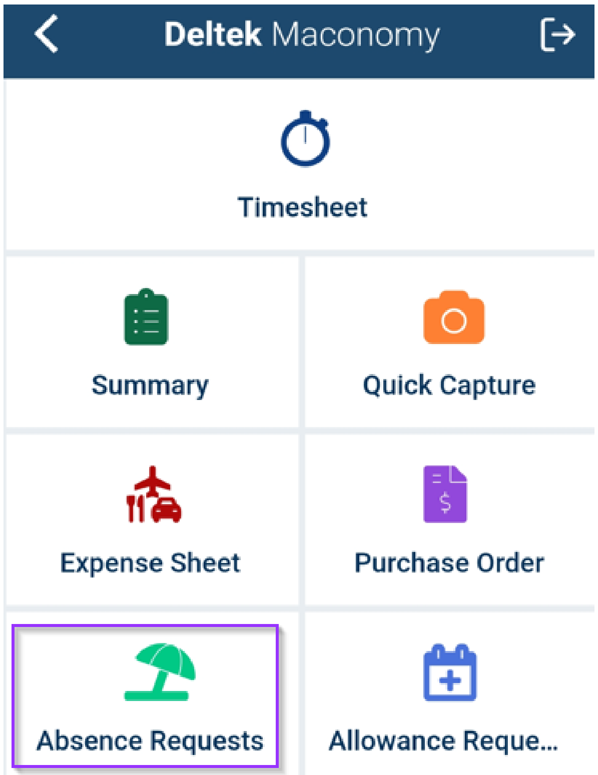
8. Once document attached and PO is ready to be submitted, go back to the top and click on , select Submit



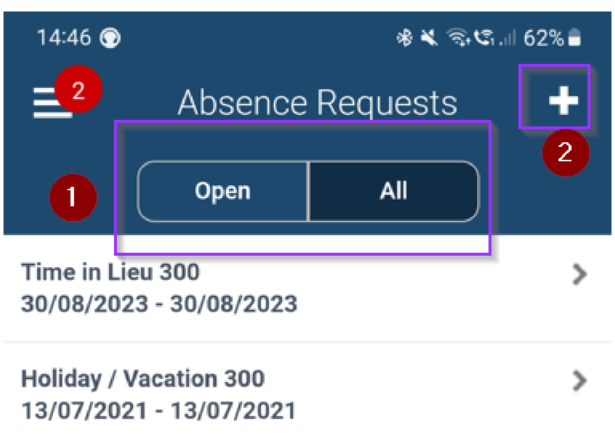
9. It will then follow an approval process your company has in place. Once approved, you will be notified.

Test Scenario #6 – Absence

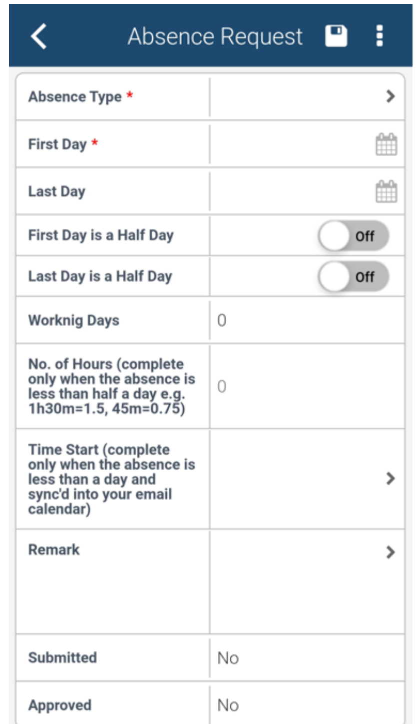
1. To request an **Absence**, from the main Menu click on **Absence Requests**



2. You will be taken to the Absence home page, where based on your view you will see just open or ALL absences, if booked. To request an absence, click on

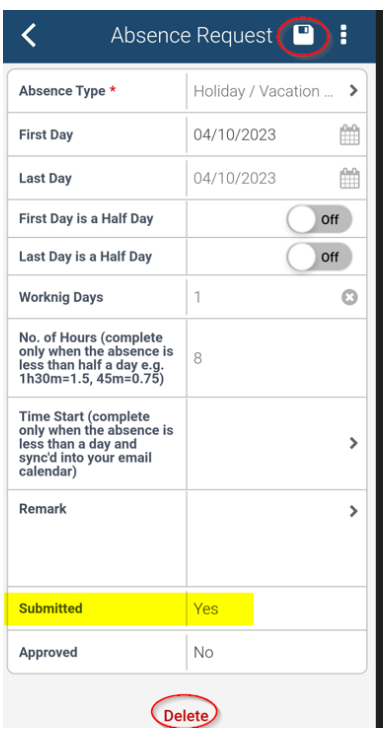


3. Update the following in the Absence Request:

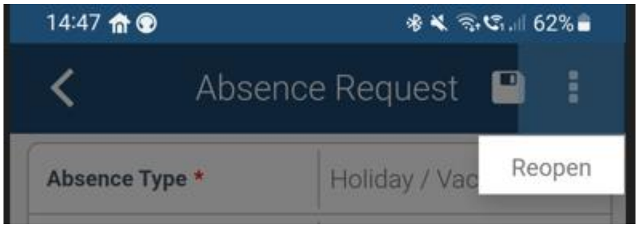


- **Absence Type** – tap into the cell and you will see a menu with all types available to select
- **First and Last Day**
- Enable **first or last day to be half a day**
- **Remark** – any notes can be entered, however, bear in mind that your approver will see them, too

4. Once finished, navigate to the top and click on save button. Upon saving, your leave will be submitted and Delete button will be available. Once your leave is approved, you will not be able to open and Delete option will be available.



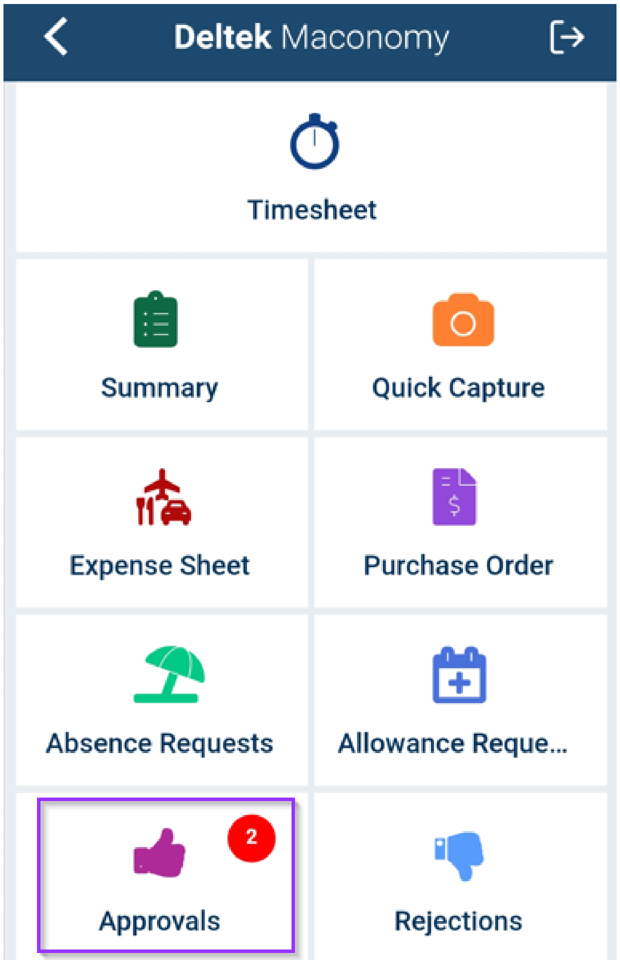
5. While it is in Submitted state, you can go back **reopen** and make changes and resubmit or delete.



6. However, once it's been approved, you will no longer be able to reopen and delete. You will need to reach out either to HR or Helpdesk for further assistance.

Test Scenario #7 – Approvals

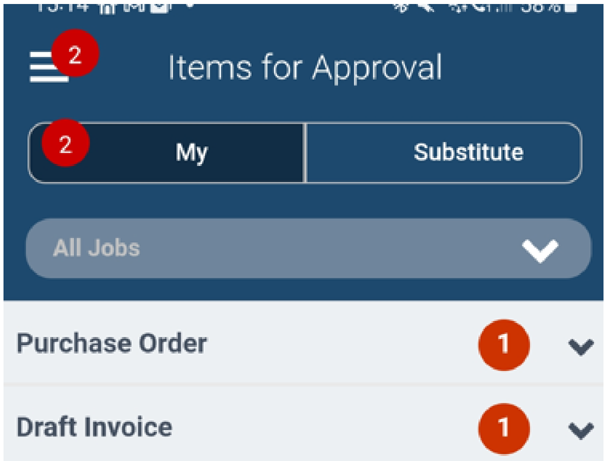
1. If you have anything to approve, you will be notified via email and also you will see a number of items waiting for your approval when you access the main menu of the app



Or if you are on any sections, you will still be able to see an alert at the top left corner, the number of items will be shown in a red circle

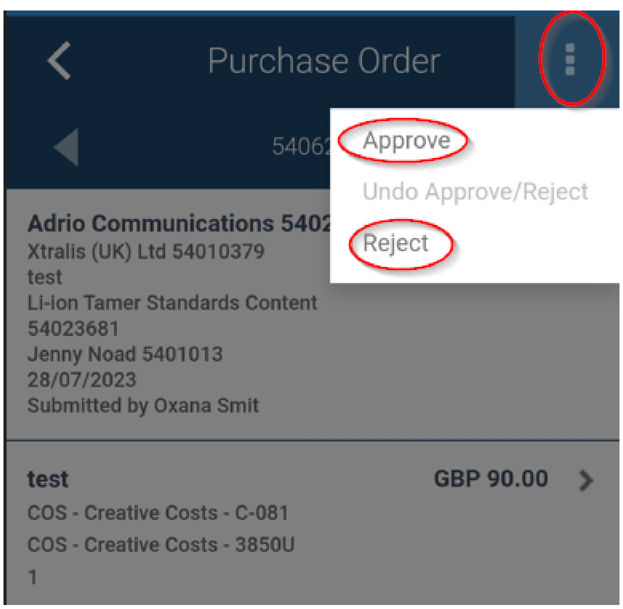
2. Tap on **Approvals** section to view what's waiting for you and from which sections, Expenses, Timesheets, POs, etc.

3. When opened, you will see a break down

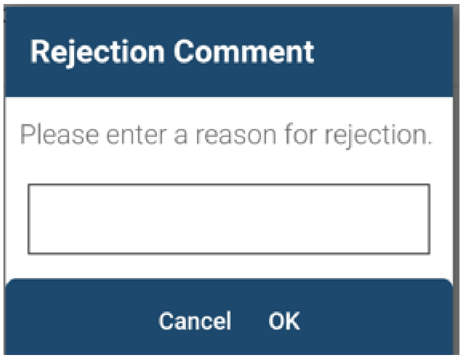


4. Tap on a section to expand and open it, and then tap again if you want to drill down to the line(s)

5. Once checks are done, navigate to the top and tap on either **Approve** if all correct, or tap **Reject** if it needs to go back to the submitter and correct

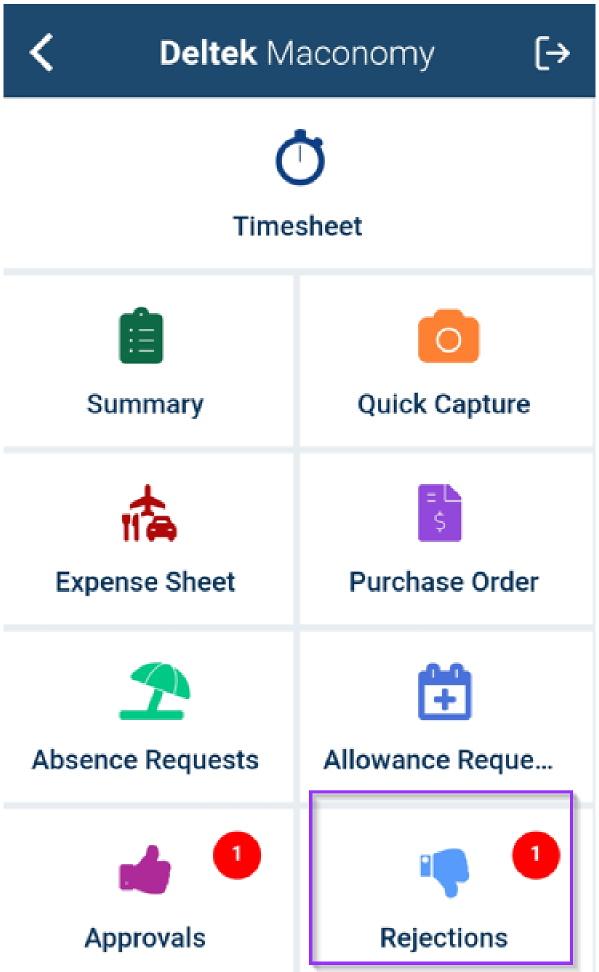


6. The system will ask you to enter a reason for rejecting. Enter and click on OK to carry out rejected.

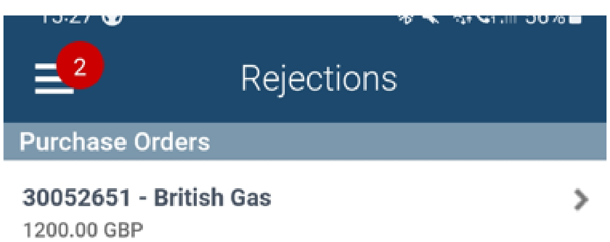


Test Scenario #8 – Rejected

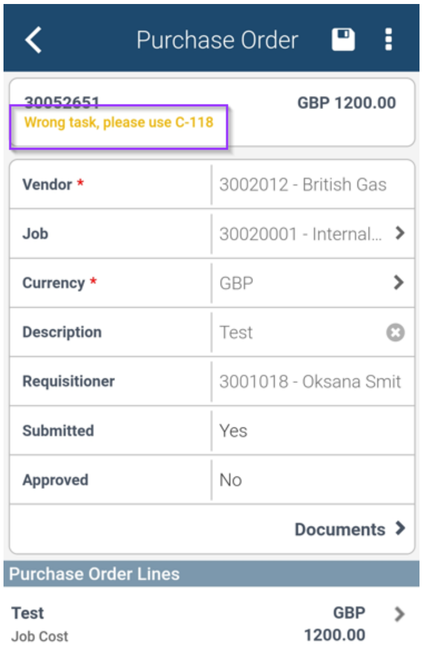
1. If anything, you created, submitted has been rejected, you will be notified via email and also when access the application you will see a notification against a **Rejections** section



2. Click on **Rejections** and you will see in what section the Rejection has been carried out.



3. Tap on that section to open it and view the rejection reason which will be at the top, usually under a transaction number of that section.



4. Make necessary corrections by clicking on a line which is always displayed at the bottom of the opened section.

5. The system will allow you to update and when you try to save your changes a below message will come up. Click on Yes and it will not only reopen but also will clear the rejection status. When all changes are done, navigate to the top and from tap on **Submit**