Deltek Time & Expense™ 10.0

Post-Installation Configuration Guide

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Contents

Overview

Welcome to the Time & Expense 10.0 Post-Installation guide. Procedures described in this guide should be completed after Time & Expense 10.0 is fully installed but before employees access the software.

Configure User Group Security Rights

Before employees can log on, you must configure security rights for user groups by performing the steps below. When you are done, you must also create user accounts, instructions for which begin on page 6.

To configure security settings for users groups, complete the following steps:

1. In the Administration domain, click **Security » System Security » Manage User Groups**.

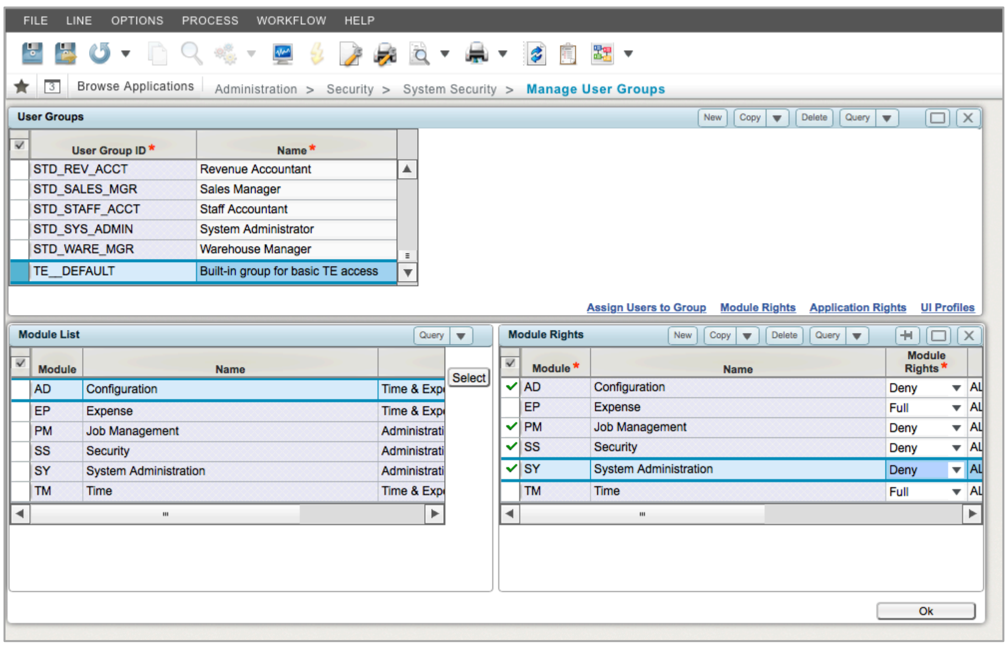
   In the Manage User Groups screen, TE__DEFAULT is the default value selected under **User Group**. This user group allows full access.

2. Click the **Module Rights** link and complete the following actions:

   a. In the **Module Lists** table, select all the rows and click **Select** to add them to the Module Rights table.

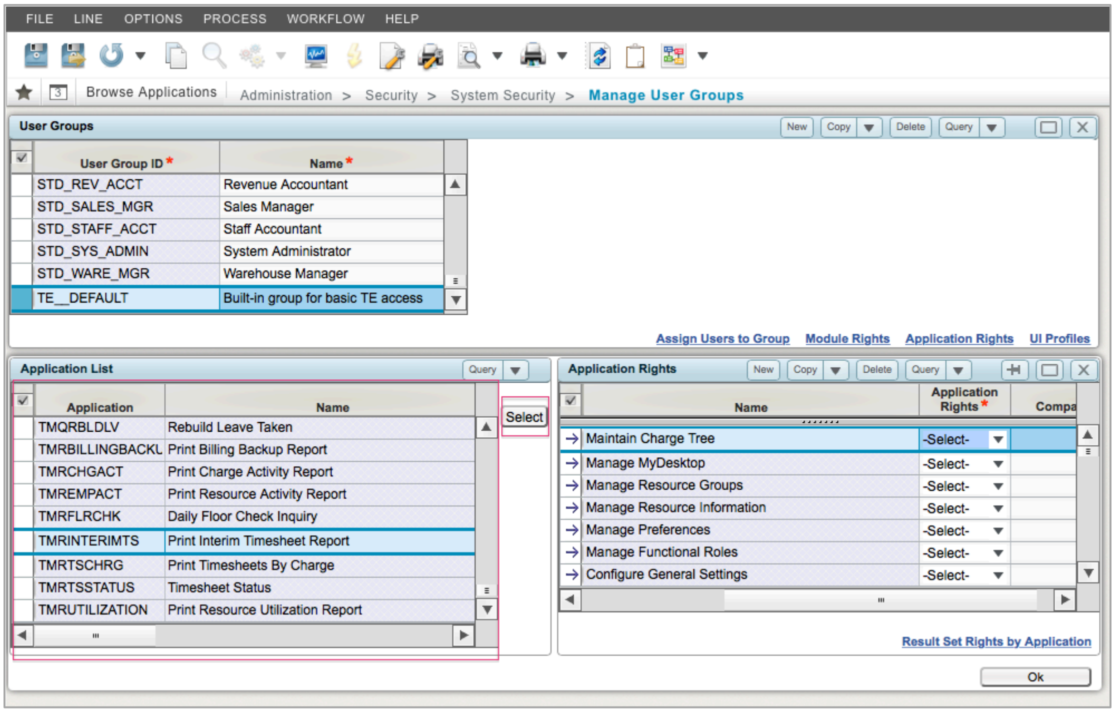
   b. In the **Module Rights** table, click the **Module Rights** drop-down menu to assign **Read-Only**, **Full**, or **Deny** rights.

   In the example below, rights are modified to deny access to everything except the Expense and Time modules.

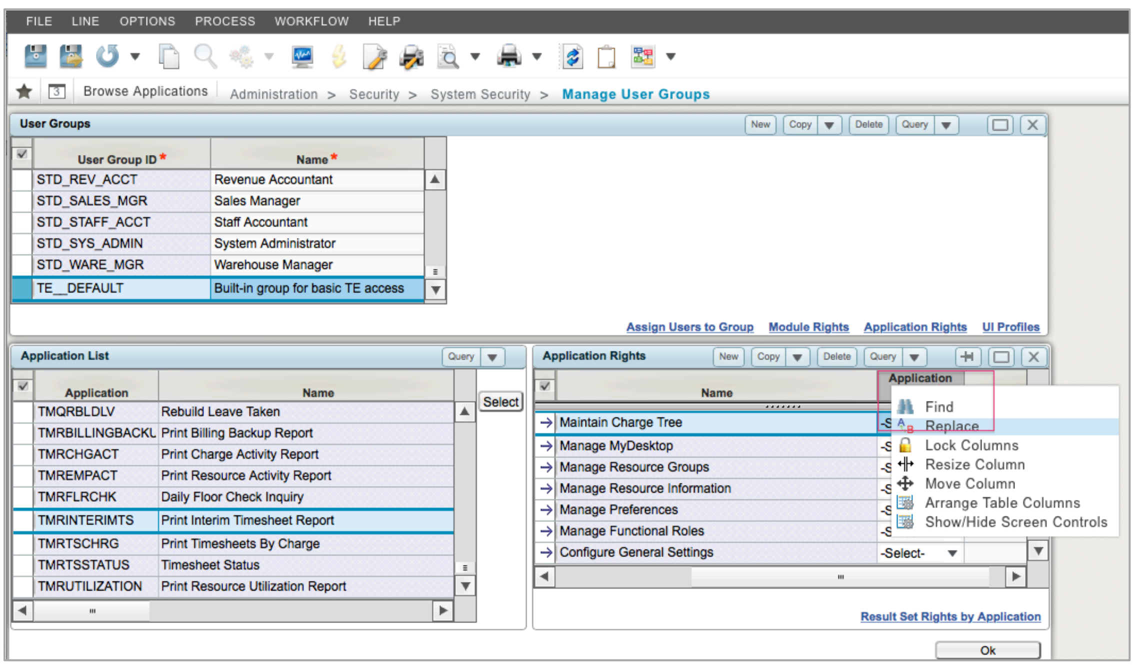


3. Click the **Application Rights** subtask to set up default application rights.

4. In the **Application Lists** table, select all the rows and click **Select** to add them to the Application Rights table.



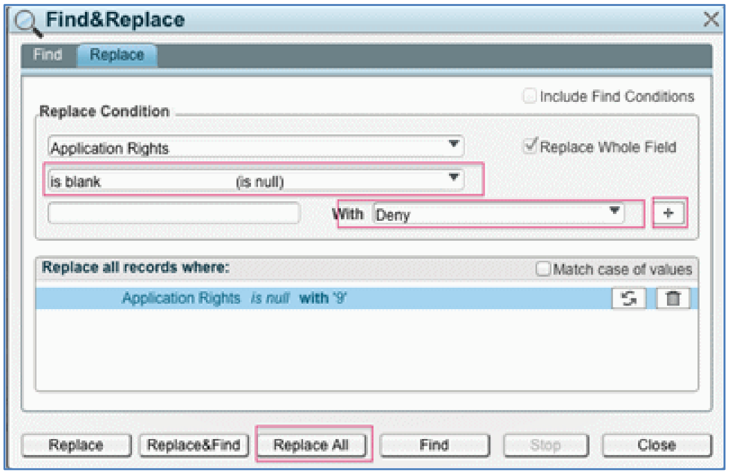
5. In the Application Rights table, right-click the **Application Rights** column header, and on the context menu, select **Replace**.



6. In the Find & Replace dialog box, complete the following steps:

   a. In the second condition line, click and select **is blank (is null)**.

   b. In **With**, click and select **Deny**.



c. Click **Replace All** twice.

   A message displays indicating that no rows were found.

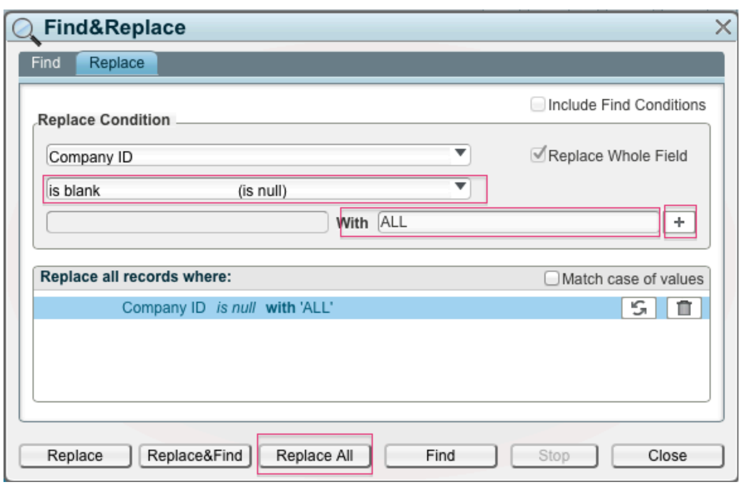
d. Click **Close**.

7. In the Application Rights table, right-click the **Company ID** column header, and on the context menu, select **Replace**.

8. In the Find & Replace dialog box, complete the following steps:

   a. In the second condition line, click and select **is blank (is null)**.

   b. In **With**, type *All*.



   c. Click **Replace All** twice.

   A message displays indicating that no rows were found.

   d. Click **Close**.

9. In the Application Rights table, complete the following steps:

   a. Locate the rows for each default application.

   b. In the Application Rights column, click and select **Full**.

   For example, to grant access to Manage Timesheets, locate the TMMTIMESHEETS Manage Timesheets row and change Deny to Full.

You have successfully defined the default application rights for all new employees.

You can refer to the groups created in TE9 and create similar user groups. You will then move selected employees out of the TE__DEFAULT group into the appropriate newly created group. Instructions for those configuration steps are forthcoming.

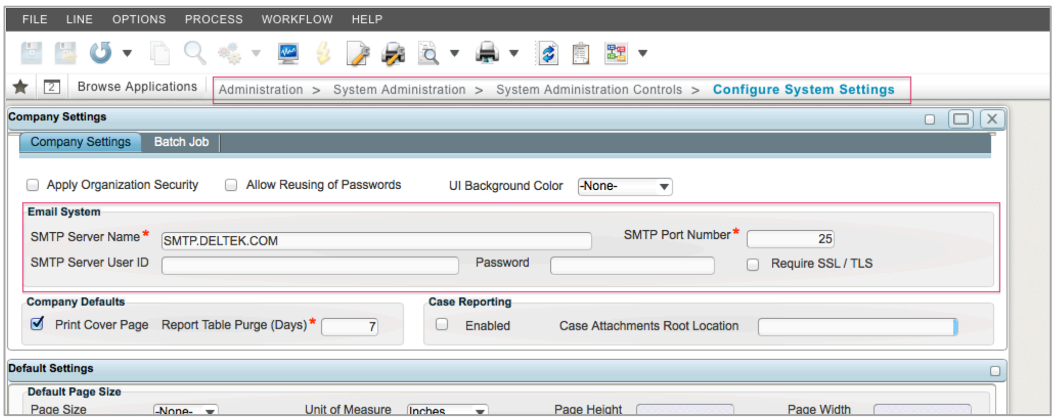
To learn more about the Manage User Groups application, see page 185 of the Deltek Time & Expense™ 10.0 Administration Guide.

Create User Accounts for Logon

Before you create user accounts, you will first configure the SMTP server.

To configure, the SMTP server, complete the following steps:

1. In the Administration domain, click **System Administration » System Administration Controls » Configure System Settings**.
2. In **SMTP Server Name** field on the Company Settings tab, enter the SMTP server information.

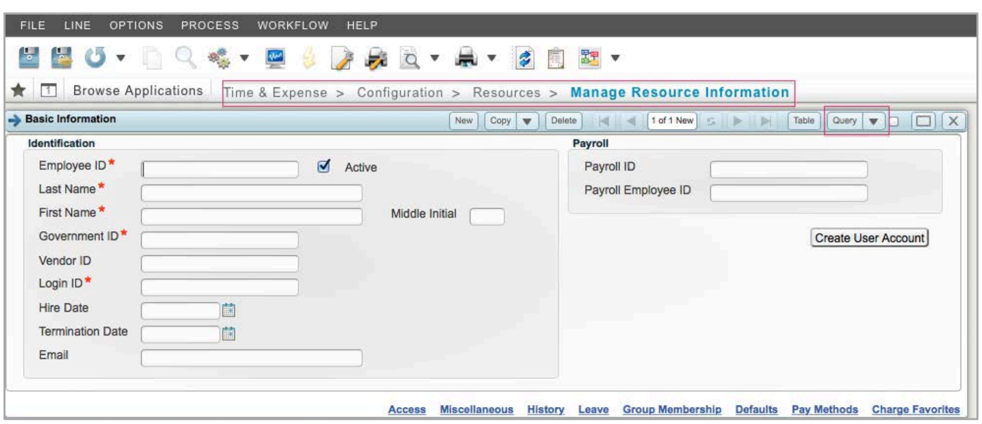


3. Click .

To learn more about the Configure Systems Settings screen, see page 123 of the Deltek Time & Expense™ 10.0 Administration Guide.

To create users accounts, complete the following steps:

1. In the Time & Expense domain, click **Configuration » Resources » Manage Resource Information**.
2. In the Manage Resource Information screen, click **Query**.



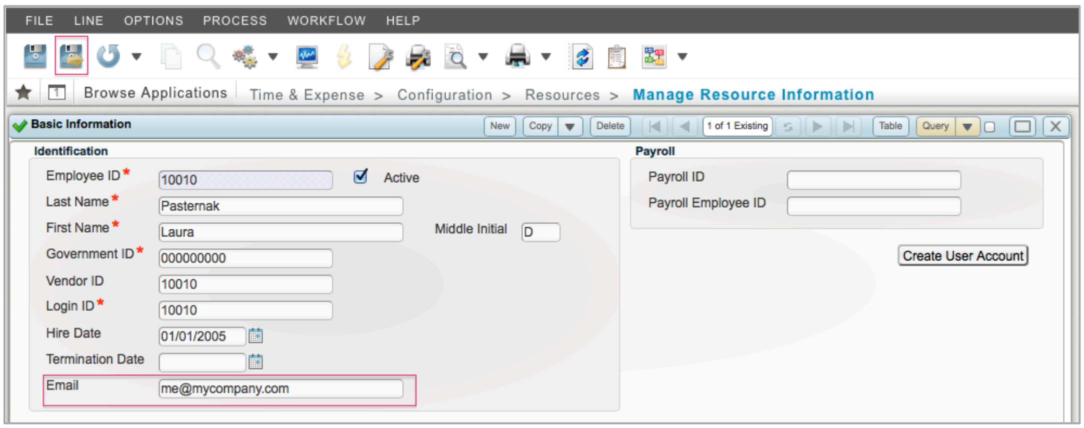
3. On the Find tab of the Query dialog box, choose one of the following actions:
   - To create a user account for one employee, type that employee's ID in **Employee ID** and click **Find**.

Information for the selected employee displays. Proceed to step 4.

- To create user accounts for a group of employees, leave **Employee ID** blank and click **Find**.

  All available records display in a table, where you can select specific ones. Proceed to Step 5.

4. If you selected a single employee record in the step above, confirm that an email address exists for the employee.



   If the address is missing, type it in the **Email** field and click .

   Proceed to step 6.

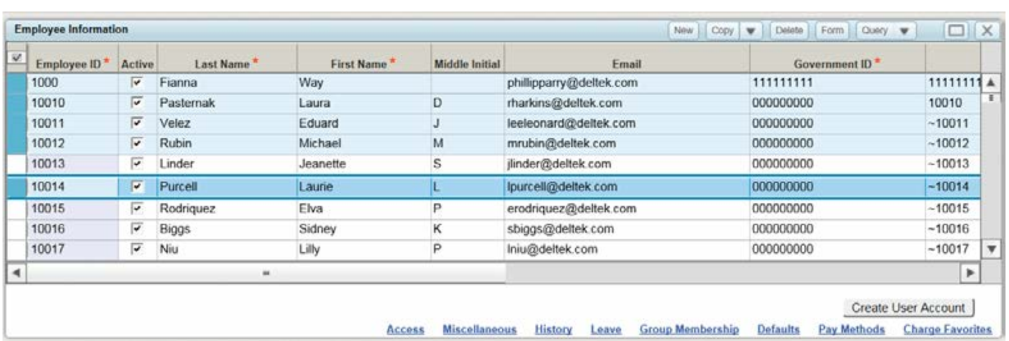
5. If you searched for multiple employee records in step 3 above, complete the following steps:

   a. Confirm that email addresses exist for the employees for whom you are creating user accounts.

      If you cannot view the **Email** column without scrolling, you can drag the column into view, as shown in the example image below.

      If addresses are missing, enter them directly in the **Email** column and click .

   b. Select the records you want to create accounts for and proceed to step 6.



6. Click **Create User Account**.

   An e-mail is sent to each employee for whom you created a user account. The message includes the initial password for logging on.

You may want to also create a CPSUPERUSER TE user for this. All new users are assigned to the TE__DEFAULT user group.

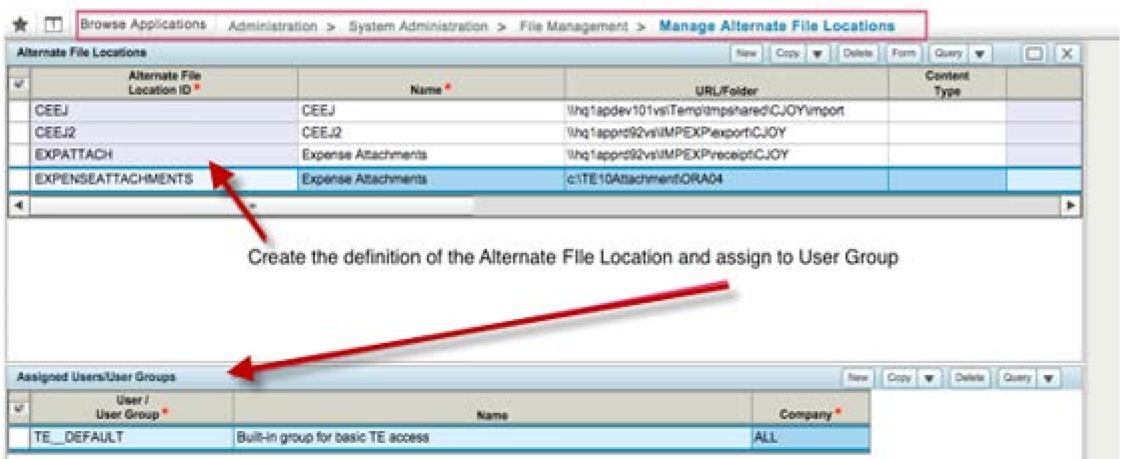
Set Up Attachments

This section includes instructions for setting up attachments.

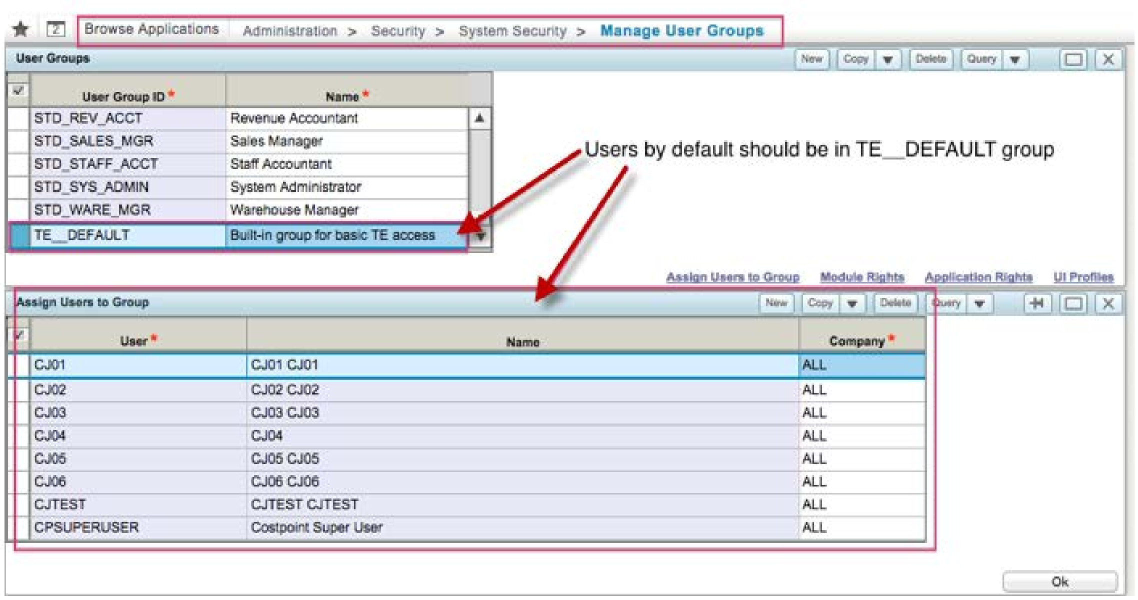
This procedure is required only if the Attachments feature was enabled in version 9.0.1.

To set up attachments, complete the following steps:

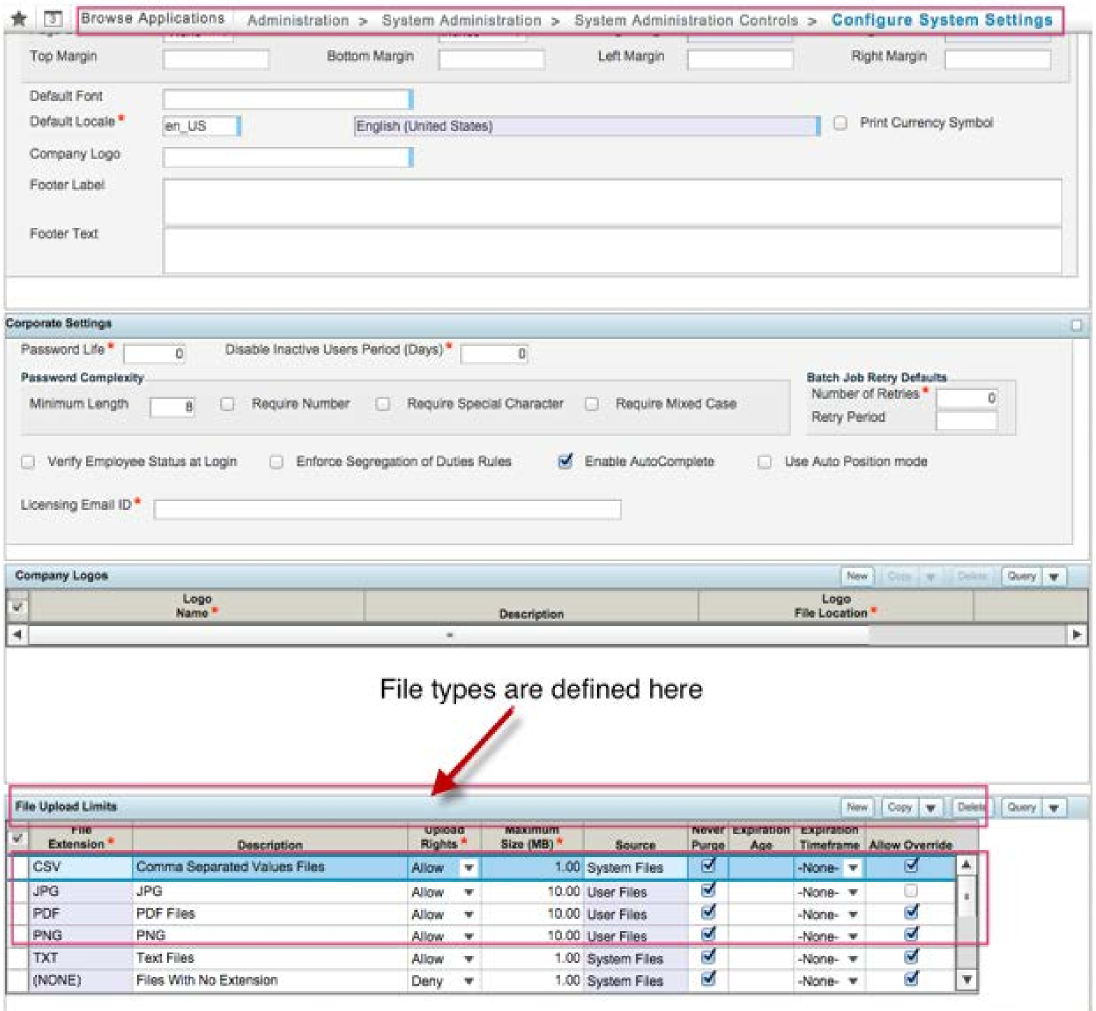
1. Go to **Administration » System Administration » File Management » Manage Alternate File Locations**.
2. Define the **Alternate File Location ID** and assign it to the **User/User Group**. The Costpoint Server must be able to access the location entered.



3. Go to **Administration » Security » System Security » Manage User Groups.**
4. Ensure that all users are in the TE__DEFAULT group.

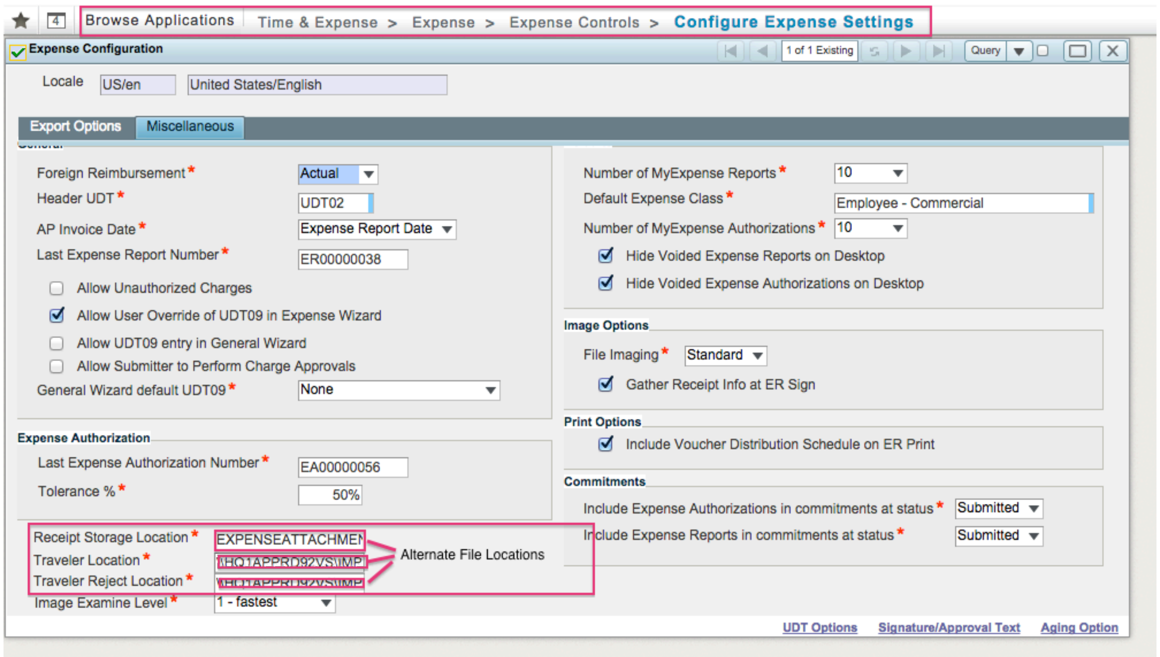


5. Go to **Administration » System Administration » System Administration Controls » Configure System Settings**
6. Enable the **File Types** and select **Allow** from the **Upload Rights** drop-down menu.



7. Go to **Time & Expense » Expense » Expense Controls » Configure Expense Settings.**

8. Define the new **Alternate File Location**



The Attachment Types used in Time & Expense 9.x are not applicable in version 10.0 and will be removed from configuration screen

Appendix A: If You Need Assistance

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

Customer Services

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

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

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

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

The following are some of the many options that the Customer Care Connect site provides:

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

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Deltek Time & Expense with Employee Self Service Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

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