

# Deltek Time & Expense™ 10.0

## Post-Installation Configuration Guide

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## 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.

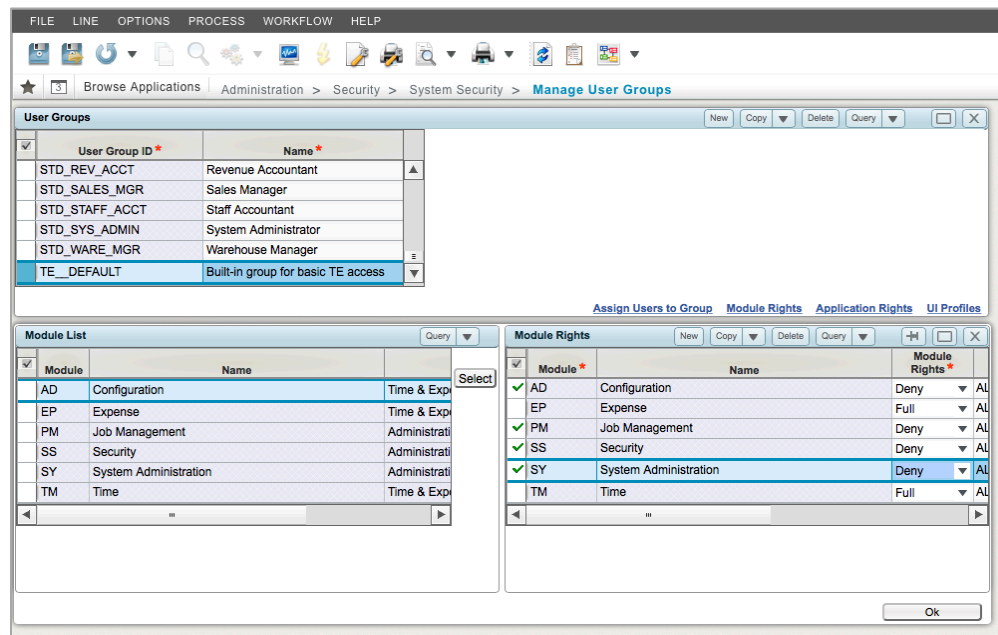
# Configure User Group Security Rights

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.

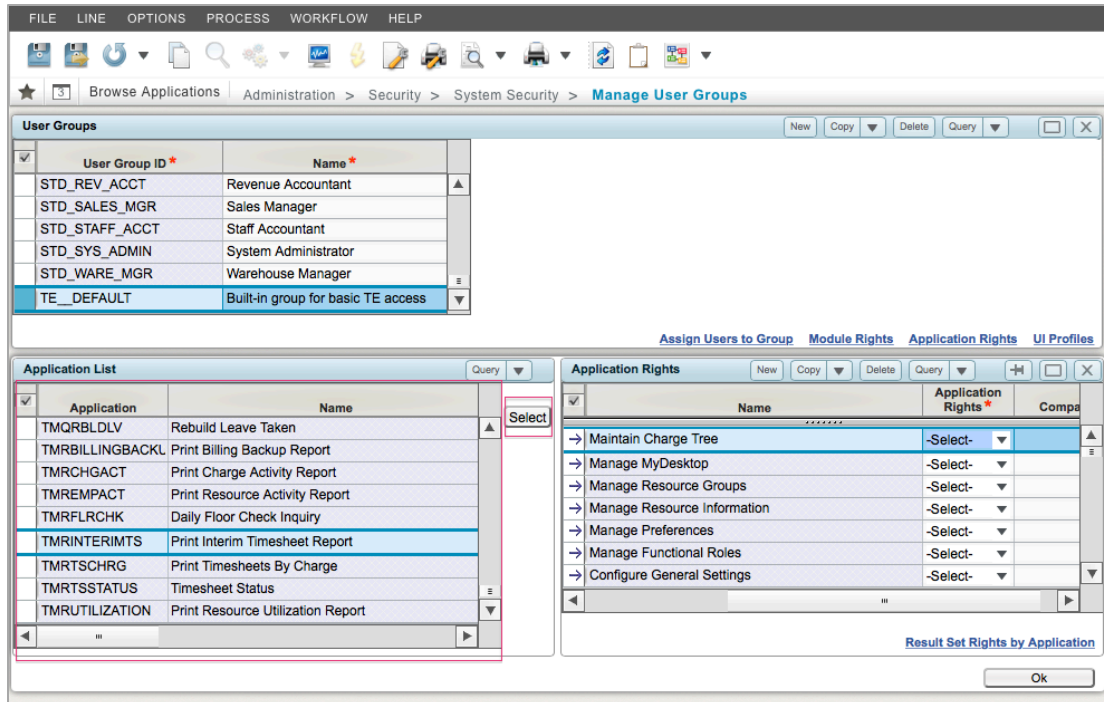
**To configure security settings for users groups, complete the following steps:**

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.

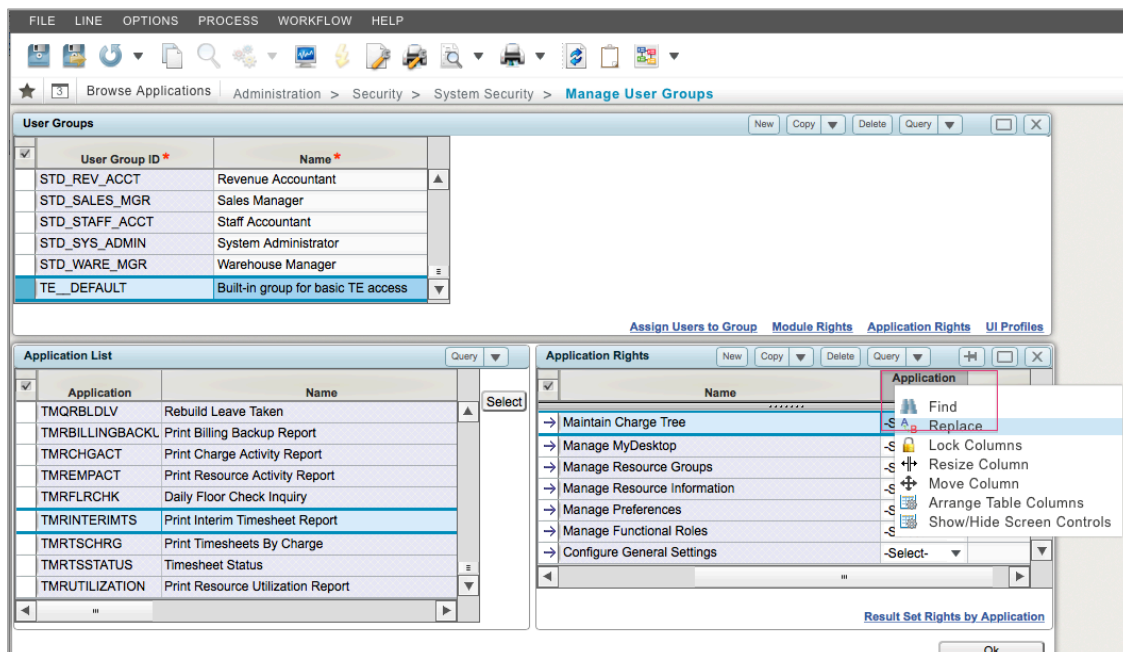
In the example below, rights are modified to deny access to everything except the Expense and Time modules.



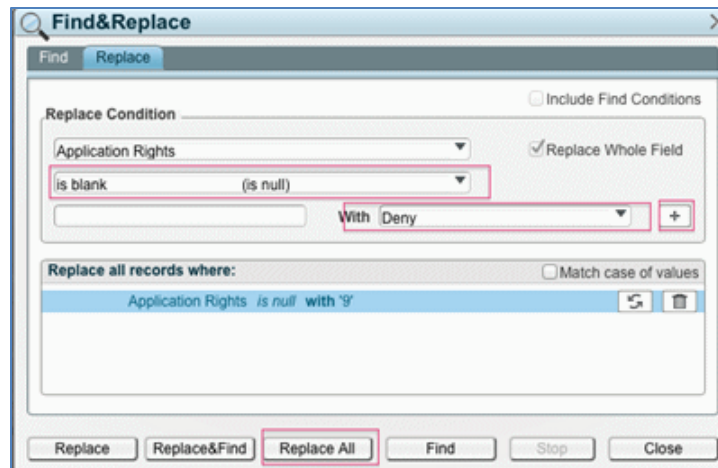
3. Click the **Application Rights** subtask to set up default application rights.
4. In the **Application Lists** table, select all the rows and click **Select** to add them to the Application Rights table.



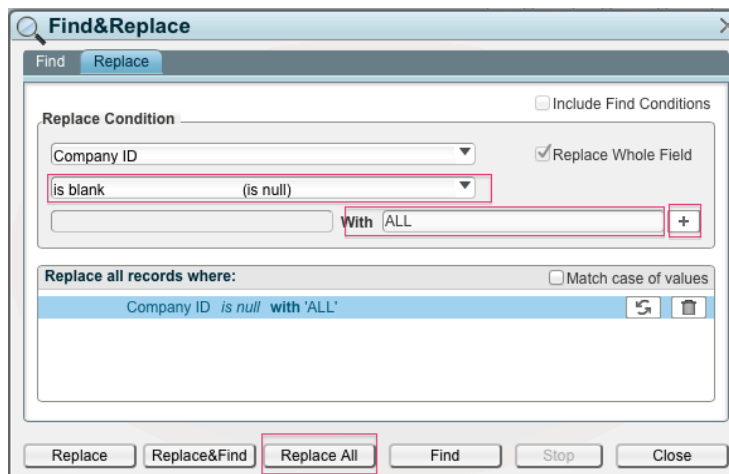
5. In the Application Rights table, right-click the **Application Rights** column header, and on the context menu, select **Replace**.



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.

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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.

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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.

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

The screenshot shows the 'Manage Resource Information' window with the 'Basic Information' tab selected. The 'Employee ID' is 10010 and the 'Active' checkbox is checked. The 'Email' field is highlighted with a red box and contains the text 'me@mycompany.com'. The 'Payroll' section shows fields for 'Payroll ID' and 'Payroll Employee ID'. A 'Create User Account' button is visible at the bottom right of the form.

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

Proceed to step 6.

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

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

The screenshot shows the 'Employee Information' table with the following data:

Employee ID *	Active	Last Name *	First Name *	Middle Initial	Email	Government ID *
1000	<input checked="" type="checkbox"/>	Fianna	Way		philpparry@deltek.com	11111111
10010	<input checked="" type="checkbox"/>	Pasternak	Laura	D	rharkins@deltek.com	00000000
10011	<input checked="" type="checkbox"/>	Velez	Eduard	J	leeleonard@deltek.com	~10011
10012	<input checked="" type="checkbox"/>	Rubin	Michael	M	mrubin@deltek.com	~10012
10013	<input checked="" type="checkbox"/>	Linder	Jeanette	S	jlinder@deltek.com	~10013
10014	<input checked="" type="checkbox"/>	Purcell	Launie	L	lpurcell@deltek.com	~10014
10015	<input checked="" type="checkbox"/>	Rodriguez	Elva	P	erodriguez@deltek.com	~10015
10016	<input checked="" type="checkbox"/>	Biggs	Sidney	K	sbiggs@deltek.com	~10016
10017	<input checked="" type="checkbox"/>	Niu	Lilly	P	lniu@deltek.com	~10017

- 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.

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# 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.

Alternate File Location ID	Name	URL/Folder	Content Type
CEEJ	CEEJ	\\hg1apdev101\vs\Temp\ImpShare\CJOY\Import	
CEEJ2	CEEJ2	\\hg1apdev101\vs\Temp\ImpShare\CJOY\Import	
EXPATTACH	Expense Attachments	\\hg1apdev101\vs\Temp\ImpShare\CJOY\Import	
EXPENSEATTACHMENTS	Expense Attachments	c:\TE10\Attachment\ORA04	

Create the definition of the Alternate File Location and assign to User Group

User / User Group	Name	Company
TE__DEFAULT	Built-in group for basic TE access	ALL

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

User Group ID	Name	Company
STD_REV_ACCT	Revenue Accountant	
STD_SALES_MGR	Sales Manager	
STD_STAFF_ACCT	Staff Accountant	
STD_SYS_ADMIN	System Administrator	
STD_WARE_MGR	Warehouse Manager	
TE__DEFAULT	Built-in group for basic TE access	

Assign Users to Group

User	Name	Company
CJ01	CJ01 CJ01	ALL
CJ02	CJ02 CJ02	ALL
CJ03	CJ03 CJ03	ALL
CJ04	CJ04	ALL
CJ05	CJ05 CJ05	ALL
CJ06	CJ06 CJ06	ALL
CJTEST	CJTEST CJTEST	ALL
CPSUPERUSER	Costpoint Super User	ALL

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.

★ [3] Browse Applications Administration > System Administration > System Administration Controls > **Configure System Settings**

Top Margin  Bottom Margin  Left Margin  Right Margin

Default Font

Default Locale   ☐ Print Currency Symbol

Company Logo

Footer Label

Footer Text

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**Corporate Settings**

Password Life  Disable Inactive Users Period (Days)

**Password Complexity**

Minimum Length  ☐ Require Number ☐ Require Special Character ☐ Require Mixed Case

☐ Verify Employee Status at Login ☐ Enforce Segregation of Duties Rules ☒ Enable AutoComplete ☐ Use Auto Position mode

Batch Job Retry Defaults

Number of Retries  Retry Period

Licensing Email ID

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**Company Logos**

New Copy Delete Query

Logo Name *	Description	Logo File Location *

File types are defined here

**File Upload Limits**

New Copy Delete Query

File Extension *	Description	Upload Rights *	Maximum Size (MB) *	Source	Never Purge	Expiration Age	Expiration Timeframe	Allow Override
CSV	Comma Separated Values Files	Allow	1.00	System Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
JPG	JPG	Allow	10.00	User Files	<input checked="" type="checkbox"/>		-None-	<input type="checkbox"/>
PDF	PDF Files	Allow	10.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
PNG	PNG	Allow	10.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
TXT	Text Files	Allow	1.00	System Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
(NONE)	Files With No Extension	Deny	1.00	System Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>

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

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

The screenshot shows the 'Configure Expense Settings' window with the following configuration details:

- Locale:** US/en, United States/English
- Export Options:**
  - Foreign Reimbursement: Actual
  - Header UDT: UDT02
  - AP Invoice Date: Expense Report Date
  - Last Expense Report Number: ER00000038
  - Allow Unauthorized Charges: ☐
  - Allow User Override of UDT09 in Expense Wizard: ☒
  - Allow UDT09 entry in General Wizard: ☐
  - Allow Submitter to Perform Charge Approvals: ☐
  - General Wizard default UDT09: None
- Expense Authorization:**
  - Last Expense Authorization Number: EA00000056
  - Tolerance %: 50%
- Receipt Storage Location:** EXPENSEATTACHMEN
- Traveler Location:** EXPENSEATTACHMEN
- Traveler Reject Location:** EXPENSEATTACHMEN
- Image Examine Level:** 1 - fastest
- Number of MyExpense Reports:** 10
- Default Expense Class:** Employee - Commercial
- Number of MyExpense Authorizations:** 10
- Hide Voided Expense Reports on Desktop:** ☒
- Hide Voided Expense Authorizations on Desktop:** ☒
- Image Options:**
  - File Imaging: Standard
  - Gather Receipt Info at ER Sign: ☒
- Print Options:**
  - Include Voucher Distribution Schedule on ER Print: ☒
- Commitments:**
  - Include Expense Authorizations in commitments at status: Submitted
  - Include Expense Reports in commitments at status: Submitted

A red box highlights the 'Receipt Storage Location', 'Traveler Location', and 'Traveler Reject Location' fields, which are all set to 'EXPENSEATTACHMEN'. A red arrow points from this box to the text 'Alternate File Locations'.



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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