

# Deltek Time & Expense with Employee Self Service™

ESS Getting Started Guide 9.0 SP1

**December 21, 2012**

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# 1

## Introduction

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## Overview

### Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

**To add a custom note using Adobe Reader X, complete the following steps:**

1. On the Reader toolbar, click **Comment** at far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.



Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

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When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

## 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 20 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 portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

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



[If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions](#)

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## 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.

---

## Introduction

Welcome to Deltek® Self Service 9.0, the employee self service tool that provides smart and easy-to-use solutions to your Human Resources (HR) and Payroll needs. Deltek Self Service has the power and flexibility to support companies using Deltek Costpoint.

This Getting Started Guide covers important concepts and how to implement and use the system. By the end, you should understand how to initialize and implement the self service system. These are a few things to keep in mind before you start:

- This guide assumes that Deltek Self Service has already been installed on your company's intranet or Internet and that you have a computer that meets the system requirements for an operating system, a browser, etc. These requirements are outlined in the Deltek Time & Expense with ESS Technical Guide.
- Deltek Self Service is an extremely flexible system. With that said, there may be special restrictions or recommendations on how it can be configured, depending on your needs.
- You can implement Deltek Self Service with or without Deltek Time or Deltek Expense. Because of this, Deltek Time and Deltek Expense each have a separate Getting Started Guide, and there will be overlap between these guides.
- In addition to this Getting Started Guide, there are other materials available to assist you with instructions on how to use Deltek Self Service 9.0:
  - The online help teaches the basic functions of the user interface and includes detail documentation about every page in the system. We recommend that you review the "User Interface Basics" section in the online help before continuing.
  - The Deltek Time & Expense with ESS Technical Guide includes a technical overview of the system along with valuable materials about the database, security, integration, and so on.



# 2

## Concepts

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## Overview

Before we explore implementation and initialization of Deltek Self Service, we should first address a few of the more important concepts:

- Costpoint Integration
- Licensing
- Employee Groups
- Functional Roles
- Security Roles
- Life Events
- Benefits Enrollment
- Workflow
- My Desktop

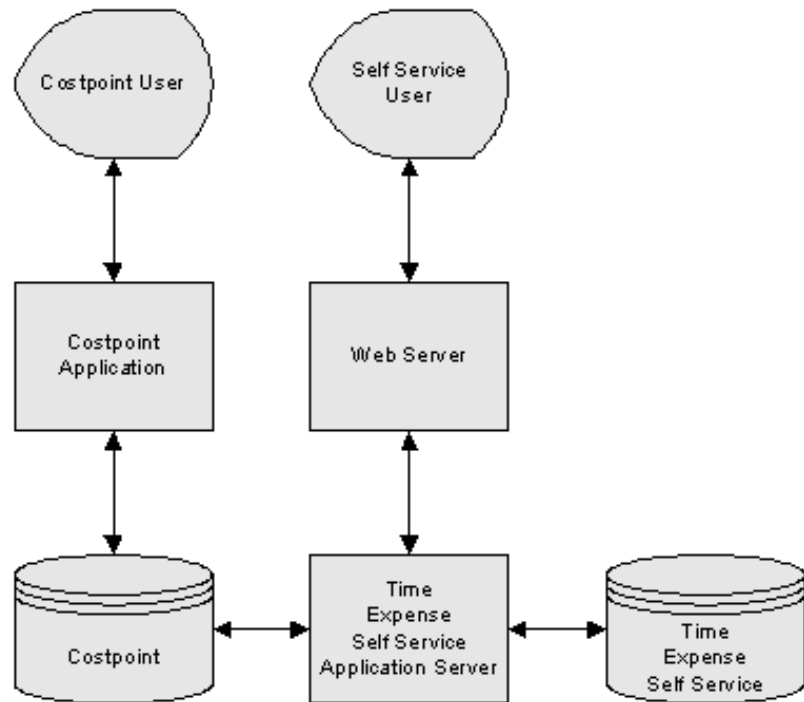
## Costpoint Integration

Deltek Self Service integrates with Deltek Costpoint using different methods from those employed by Deltek Time and Deltek Expense. Although Deltek Self Service does rely on downloading employees to populate its Employee table, the remaining interfacing is performed directly against the Costpoint Database in real-time. The diagram to the right illustrates how Deltek Self Service accesses and updates data from two databases:

1. Costpoint, and
2. Deltek Time & Expense with Employee Self Service.

The Deltek Costpoint database contains configuration settings for Self Service and stores the user's Self Service data. The Deltek Time & Expense with Employee Self Service database contains user security

information and a minimal number of configuration settings. For example, user logins are validated against the security setup in Deltek Self Service. Whether employees can access a screen in Deltek Self Service depends on their Deltek Self Service rights.





## Licensing

This section details the numerous licensing options for Deltek Time & Expense with Employee Self Service.

### Modules

Deltek Time & Expense with Employee Self Service is comprised of separate modules that can be licensed separately or together, which include the following. Since the version 7.1 release, it has offered the following modules:

- Web Deltek Expense
- Web Deltek Time
- Web Self Service

All modules install during installation. If you have a license for all modules, you can configure Deltek Time & Expense with Employee Self Service so that some employees have access to one particular module but not to others. Employees can be granted access to one or more licensed modules. These modules share certain screens (applications), and an employee lacking a license for one module may find that certain options are disabled or not shown.

The following table breaks down the screens by module.

Global Menu				
Option	Application	Time	Expense	Self Service
<b>Desktop</b>	Desktop	X	X	X
<b>Preferences</b>	Preferences	X	X	X
Time Entry Module				
Menu	Application	Time	Expense	Self Service
<b>Schedule</b>	Employee Work Schedule	X		
<b>Record Time</b>	Time	X		
	Generate Timesheets	X		
<b>Process</b>	Export Timesheets	X		
	TS Line Approval	X		
<b>Analyze</b>	Charge Activity	X		
	Employee Activity	X		
	Utilization Inquiry	X		
	Billing Backup	X		
	Print Timesheets by Charge	X		
	Interim Timesheet	X		
<b>Audit</b>	Daily Floor Check	X		
	Timesheet Status	X		

<b>Settings</b>	Time Configuration	X		
	Utilizations	X		
	Company Work Schedules	X		
	Timesheet Schedules	X		
	Wage Schedules	X		
	Leave Types	X		
	Timesheet Classes	X		
	Events	X		
<b>Utilities</b>	Mass Correct Timesheets	X		
	Change TS Status	X		
	Clear Timesheets	X		
	Timesheet Transfer	X		
	Rebuild Leave	X		
<b>Expense Module</b>				
<b>Menu</b>	<b>Application</b>	<b>Time</b>	<b>Expense</b>	<b>Self Service</b>
<b>Plan Expenses</b>	Expense Authorization		X <sup>1</sup>	
<b>Record Expenses</b>	Expense Report		X	X
<b>Process</b>	Export ERs/Advances		X	X
	Export Commitments		X	
	Maintain Imported Expenses		X	
	Compute Commitments		X	
<b>Analyze</b>	Outstanding Aging		X	
<b>Audit</b>	Expense Report Status		X	
	Expense Authorization Status		X	
	Commitment Inquiry Report		X	
<b>Settings</b>	Expense Configuration		X	X
	Currencies	X	X	
	M&IE Breakdown		X	
	Providers		X	
	Charge Types		X	
	Pay Methods		X	
	Currency Schedules		X	
	Per Diem Schedules		X	
	Tax Schedules		X	

	Expense Types		X	
	Expense Report Types		X	
	Expense Classes		X	
	Batch Types		X	
<b>Utilities</b>	Clear Expense Reports		X	
	Clear Expense Authorizations		X	
	Expense Utility		X	
	Advance Utility		X	
	Payment Utility		X	
	Per Diem Preprocessor		X	
	Change ER/Advance Status		X	
<b>Self Service Module</b>				
<b>Menu</b>	<b>Application</b>	<b>Time</b>	<b>Expense</b>	<b>Self Service</b>
<b>Employee Information</b>	Employee Personal Info			X
	Address/Phone			X
	Emergency Contacts			X
	Education, Skills & Training			X
	Company Directory			X
	Company Links			X
<b>Payroll &amp; Benefits</b>	Payroll Checks			X
	Expense Checks			X
	Leave Status			X
	Life Events/New Hires			X
	Benefits Enrollment			X
	Direct Deposit			X
	Federal Withholding			X
	State Withholding			X
	Retirement Benefits			X
	Electronic W2s			X
	Dependents Beneficiaries			X
	Designate Beneficiaries			X
	Total Comp/Benefits Statement			X
<b>Process</b>	Self Service Sync			X
<b>Settings</b>	Self Service Configuration			X

<b>Utilities</b>	Self Service Status			X
<b>Administration Module</b>				
<b>Menu</b>	<b>Application</b>	<b>Time</b>	<b>Expense</b>	<b>Self Service</b>
<b>Product Configuration</b>	General Configuration	X	X	X
	UDT01 Account Types	X	X	
	Employee Group Types	X	X	X
	Custom Text	X	X	X
	Recurrence Codes	X	X	X
<b>Users &amp; Groups</b>	Employee Information	X	X	X
	Employee Groups	X	X	X
	Security Roles	X	X	X
	Functional Roles	X	X	X
	Password Utility	X	X	X
<b>Master Data</b>	Charge Trees	X	X	
	UDT01	X	X	
	UDT02	X	X	
	UDT03	X	X	
	UDT04	X	X	
	UDT05	X	X	
	UDT06	X	X	
	UDT07	X	X	
	UDT08	X	X	
	UDT09	X	X	
	UDT010	X	X	
	UDT011	X	X	
	UDT012	X	X	
	UDT013	X	X	
	UDT014	X	X	
	UDT015	X	X	
<b>Process</b>	Import Console	X	X	X
	Scheduling	X	X	X

<sup>1</sup> Available if system is licensed for Expense Authorizations add-on feature.

## Add-On Modules

You can also license add-on features for the entire system. These features are either enabled or not enabled and can be used by all licensed users of the product. The following add-on modules are currently available:

- Deltek Mobile Time (For further information and configurations steps, see *Appendix C: Configuring Deltek Mobile Time* in the Time Collection Getting Started Guide.)
- Expense Authorizations

## License Types

Deltek Time & Expense with Employee Self Service supports two different types of licenses:

- Seat — This license gives users unlimited transactions (timesheets and/or expense reports).
- Transactional — This license allows you to share with other users of the same license type a pool of either timesheets and/or expense reports. Once you have exhausted the pool of transactions, you must purchase more.



Transactional licenses do not apply to the Self Service module.

---

- Trial — The trial license allows you to try a module before purchasing it. Presently, they are only available for Deltek Mobile Time.

Under a Seat license, Deltek Time & Expense with Employee Self Service tracks:

- The number of licensed users and whether the prescribed maximum has been exceeded.
- When the license type is assigned and saved in the Employee Information screen, and
- When a user of that license type logs in.

If you have a Transactional license, the system will not allow new users to be assigned this license type if the pool of licenses has been used up. If the pool has been used up, the system will not allow a user to add a timesheet or an expense report.



The type of license is based on the employee whose timesheet or expense report is being entered. Thus, when an administrator enters a timesheet or expense report for an employee, the employee determines how the license is evaluated.

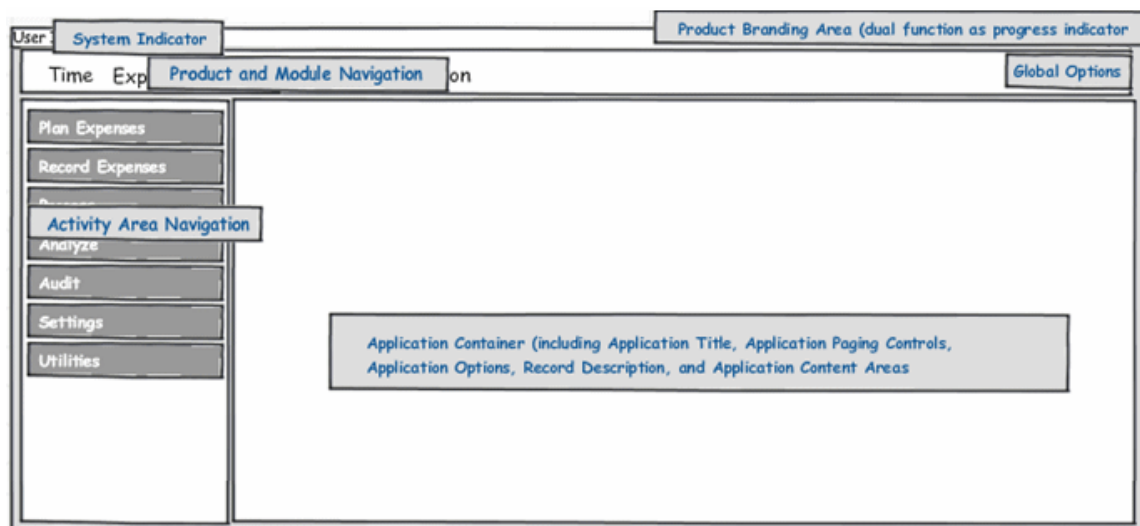
---

## User Interface Basics

Though the browser-based user interface for Deltek Time & Expense with Employee Self Service is designed for simplicity and ease of use, you can customize portions of the user interface to more accurately reflect your corporate environment. Refer to the Deltek Time & Expense with ESS Technical Guide to learn how to customize the user interface. Before we explore the basics of the user interface, it is important to note a few display components:.

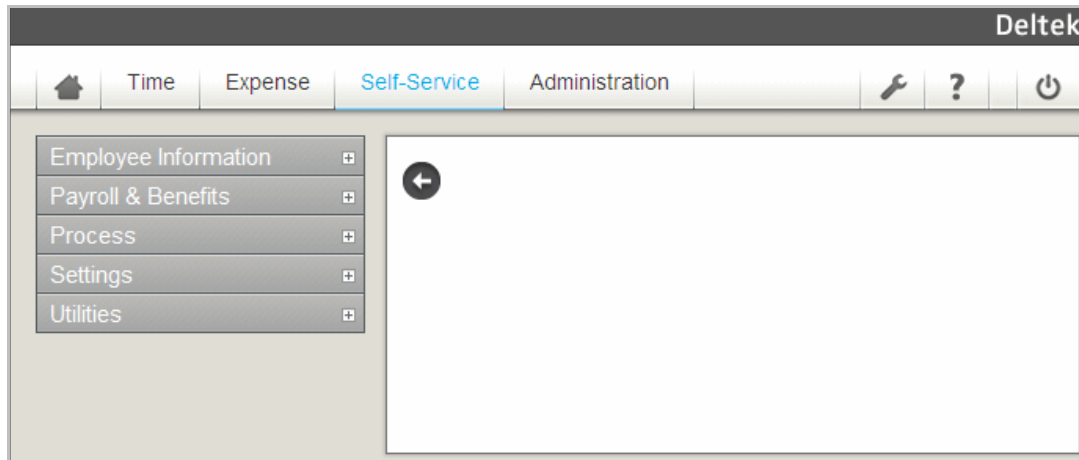
- **Browser** - Deltek Time & Expense with Employee Self Service supports several browsers and operating systems. Accordingly, appearance and behavior for certain screens may vary slightly. Please refer to the Deltek Time & Expense with ESS Technical Guide for further details.
- **Resolution** - Deltek Time & Expense with Employee Self Service was designed for a minimum resolution of 1024x768 pixels with the browser window maximized. When you use a lower resolution or the browser window is not maximized, the system displays scroll bars. With higher resolutions additional visual information may display to the left and bottom. In an ideal setup, the available page size is about 720x580 pixels (remember that the browser's toolbar, status bar, and other features also require significant visual space).
- **Colors** - Your minimum color setting is 256 colors.
- **Fonts** - Deltek Time & Expense with Employee Self Service uses two standard fonts, with proportional font sizing. While normal font size is 8pt, the fonts will resize based on browser options. Deltek Time & Expense with Employee Self Service uses the first of these two fonts that it finds available:
  - Arial
  - Sans-serif

## Page Layout



This image provides a visual representation of how pages display. Names are assigned to the various regions of the page.

## Sample Layout





## Product Branding Area

This area displays a graphic background image that relates to the product. The width of the area stretches or shrinks to reflect the available space. The fixed height for this area is greater over the navigation area than the Application Name and Global Options areas.



## Application Name Area


The application name area displays the name of the application currently running. This area is fixed in size.

Click  to hide or show the navigation area and system area. The arrow points to the left if the navigation area is currently displayed, and points to the right  if the navigation area is hidden.

## Global Options Area






This area displays global toolbar icons. These icons are accessible across all screens and always display. The following table presents descriptions of each icon.

Icon	Description
	MyDesktop - Takes you to your Desktop. See the "MyDesktop" section later in this guide for further information.
	<p>This drop-down list contains the following items:</p> <p>Help – Select this item to launch the online help system in a separate browser window. Help context relates to the page currently displayed. See "Help Dialog Box" later in this guide for further information.</p> <p>Contact Us – Select this item to contact your company's web master.</p> <p>About Deltek Time &amp; Expense – Select this item to display the About Deltek time &amp; Expense with Employee Self Service dialog box. See "About Deltek Time &amp; Expense with Employee Self Service" in this guide for further information.</p>

Icon	Description
	Logout - Logs you out and exits Deltek Time & Expense with Employee Self Service

## Application Options Area





The Application options area offers functions that are specific to the application currently displayed in the application area. Examples of application options are:

-  New
-  Save
-  Delete
-  Search
-  Print



When Application Options appear dimmed or disabled, this indicates that either you do not have rights to the option or they are not applicable to the current display.

The Application Options Area may also include record navigation icons. These icons are located on the right side of the Application Options Area. Use them to browse through records you have searched. The table below presents descriptions of each navigation icon.

Icon	Description
	First - Select this icon to refresh the application area with data from the first record in the search list. This icon is disabled if you are currently working on the first record or have no search results.
	Previous - Select this icon to refresh the application area with data from the previous record in the search list. This icon is disabled while you work on the first record or if you have no search results.
	Next - Select this icon to refresh the application area with data from the next record in the search list. This icon is disabled while you work on the last record or if you have no search results.
	Last - Select this icon to refresh the application area with data from the last record in the search list. This icon is disabled while you work on the last record or if you have no search results.

## System Area

The System Area displays the following information related to both Deltek Time & Expense with Employee Self Service and the user:

- User's Login ID



- Domain

## Menu Navigation Area

Use the Menu Navigation Area to navigate Deltek Time & Expense with Employee Self Service. The menus are dynamic and display only options for which you have access rights and/or are licensed for them. For example, some options are available only to licensed users of Deltek Time Collection or Deltek Expense.

Some menu items expand when you click them, and collapse when you click them again. You can hide the Menu Navigation Area by using the "arrow" icon in the Application Name Area.

The following table presents the current menu structure by module:

Time Entry Module	
Menu	Application
<b>Schedule</b>	Employee Work Schedule
<b>Record Time</b>	Time Generate Timesheets
<b>Process</b>	Export Timesheets TS Line Approval
<b>Analyze</b>	Charge Activity Employee Activity Utilization Inquiry Billing Backup Print Timesheets by Charge Interim Timesheet
<b>Audit</b>	Daily Floor Check Timesheet Status
<b>Settings</b>	Time Configuration Utilizations Company Work Schedules Timesheet Schedules Wage Schedules Leave Types Timesheet Classes Events
<b>Utilities</b>	Mass Correct Timesheets Change TS Status Clear Timesheets

	Timesheet Transfer Rebuild Leave
<b>Expense Module</b>	
<b>Menu</b>	<b>Application</b>
<b>Plan Expenses</b>	Expense Authorization
<b>Record Expenses</b>	Expense Report
<b>Process</b>	Export ERs/Advances Export Commitments Maintain Imported Expenses Compute Commitments
<b>Analyze</b>	Outstanding Aging
<b>Audit</b>	Expense Report Status Expense Authorization Status Commitment Inquiry Report
<b>Settings</b>	Expense Configuration Currencies M&IE Breakdown Providers Charge Types Pay Methods Currency Schedules Per Diem Schedules Tax Schedules Expense Types Expense Report Types Expense Classes Batch Types
<b>Utilities</b>	Clear Expense Reports Clear Expense Authorizations Expense Utility Advance Utility Payment Utility Per Diem Preprocessor Change ER/Advance Status
<b>Employee Self-Service</b>	

Menu	Application
<b>Employee Information</b>	Employee Personal Info Address/Phone Emergency Contacts Education, Skills & Training Company Directory Company Links
<b>Payroll &amp; Benefits</b>	Payroll Checks Expense Checks Leave Status Life Events/New Hires Benefits Enrollment Direct Deposit Federal Withholding State Withholding Retirement Benefits Electronic W2s Dependents Beneficiaries Designate Beneficiaries Total Comp/Benefits Statement
<b>Process</b>	Self Service Sync
<b>Settings</b>	Self Service Configuration
<b>Utilities</b>	Self Service Status
<b>Administration</b>	
Menu	Application
<b>Product Configuration</b>	General Configuration UDT01 Account Types Employee Group Types Custom Text Recurrence Codes
<b>Users &amp; Groups</b>	Employee Information Employee Groups Security Roles Functional Roles Password Utility

<b>Master Data</b>	Charge Trees UDT01 UDT02 UDT03 UDT04 UDT05 UDT06 UDT07 UDT08 UDT09 UDT010 UDT011 UDT012 UDT013 UDT014 UDT015
<b>Process</b>	Import Console Scheduling



Only menu selections to which you have rights and license are displayed.

## Application Area

The application area displays the application (screen) currently running. If you are not currently using any of the applications, Deltek Time & Expense with Employee Self Service displays a centered "splash" screen image -- providing you have set your preference for it (in the *Default Screen* field of the Preferences screen, select "Splash").



You can customize the graphic image. You can also customize the colors of certain areas of the screens and dialogs. See the Deltek Time & Expense with ESS Technical Guide for more information. The dimensions for the company logo graphic file are:

- Resizable in width - up to 100 pixels
- Resizable in height - up to 50 pixels.

## Application Basics

Deltek Time & Expense with Employee Self Service comprises several applications. Four types of applications normally display in the application area.

- Maintenance Application
- Process Application
- Benefits Enrollment Application
- Life Events Application

### Maintenance Application

The screenshot shows a web application titled "Self Service Sync". At the top left is a back arrow icon. Below the title is a toolbar with icons for "New" (blue document), "Save" (floppy disk), "Delete" (trash can), and "Search" (magnifying glass). The main content area features a "Synchronize Options" section with a light gray background. This section contains six checkboxes arranged in two columns: "Life Event Master", "New Life Events", "Deleted Life Events" on the left, and "Expired Life Events", "New Benefits Enrollment", "Expired Benefits Enrollment" on the right. All checkboxes are currently unchecked. Below the options is a single "Execute" button.

*The screen image above is an example of a Maintenance application.*

### Summary

A maintenance application's display commences as an empty form view. The application may or may not contain tabs or navigation icons. Basic applications have the following characteristics:

- Toolbar and navigation icons
- Description of record displays above the form
- Background spans entire application area
- May have tabs

## Process Application

The screenshot shows the 'Self Service Configuration' application. It features a 'Save' button at the top left. Below it is a tabbed interface with four tabs: 'General Options', 'Application Options', 'Workflow Options', and 'Benefit Sequence'. The 'General Options' tab is active. It contains several sections: 'Text Format' with a dropdown menu set to 'No Formatting'; 'Phone Format' with radio buttons for 'No Formatting', '(000) 000-0000', '000-000-0000', '000.000.0000', and '000/000-0000'; 'Postal Format' with radio buttons for 'No Formatting', '00000', and '00000-0000'; 'Benefits Enrollment' with a checked checkbox for 'Allow Rollover Capability'; 'Direct Deposit' with checked checkboxes for 'Allow Update of Current Accounts' and 'Allow Update of Pending Accounts'; and 'Total Comp/Benefits' with checked checkboxes for 'Show Total Compensation Summary' and 'Show Benefit Elections'.

The screen image above is an example of a Process application.

## Summary

This type of application consists of a simple or tabbed form. No Add, Search, or Edit functions are present because the screen is either updating a single record and/or performing a process.

Process applications have the following characteristics:

- No toolbar or navigation icons
- Background centered in application area
- May have tabs

## Benefits Enrollment Application

The screenshot shows the 'Benefits Enrollment' application for 'Jastillana, Karen I. (KAREN)'. It displays the 'Plan Start Date: Jan 3, 2012' and 'Plan End Date: Jan 2, 2013'. A message states: 'The open enrollment period is from Jan 1, 1901 to Nov 11, 1901. The elections you make here will be effective from Jan 3, 2012 to Jan 2, 2013.' On the left is a vertical list of 13 items: 1. Instructions (highlighted), 2. Current Elections, 3. Dependents/Beneficiaries, 4. Dependent FSA, 5. Medical FSA, 6. Other Benefits, 7. Employee Life, 8. Accidental Death & Dismemberment, 9. Dependent Life, 10. Supplemental Life, 11. Supplemental AD&D, 12. Spouse Life, and 13. Medical Benefits. At the bottom right are two buttons: 'Exit Benefits Enrollment' and 'Continue >'.

Use the Benefits Enrollment application to select benefits for the upcoming year. The interface display for this interview application is divided into three sections:

- Interview Identification Area - Located in the upper left portion of the screen, this area identifies the interview that you are performing. For Benefits Enrollment, it displays the plan year start date and end date.
- Interview Navigation Area - Running down the left portion of the screen, this area contains a navigation menu that displays the path through the pages you must navigate. Use it to jump to different pages.
- Application Area - Use this area to perform your task. Application pages displayed in this area are:
  - Current Elections Page - This page displays your current elections.
  - Instructions Page - This page displays the Benefits Enrollment instructions.
  - Module Pages - Use these pages to update your benefits.
  - Summary Page - This page displays a summary of elections for the upcoming year.
  - Closed Summary Page - This page displays a summary of elections for the upcoming year (or current year when the Benefits Enrollment window is closed).

## Application Functions

Benefits Enrollment presents you with data to edit as you navigate through one or more pages. The application functions are limited to the following:

- Exit Benefits Enrollment - Exit the application.
- Back - Navigate back one screen.
- Save - Save your edits in the current page and navigate to the next.
- Come Back Later - Deltek Time & Expense with Employee Self Service records that the page needs to be completed later and then navigates to next screen.
- Continue - Navigate from the instructions page into Benefits Enrollment.
- Confirm – Verify that you are finished with Benefits Enrollment

## Life Events/New Hires Application

The screenshot shows the Deltek ESS interface for a Life Event. At the top, the user is identified as "Jastilana, Karen I. (KAREN)". Below this, the event details are listed: "Life Event: Julia Life Event" and "Life Event Date: Mar 26, 2012". A navigation menu on the left lists eight steps: 1. Instructions (highlighted in blue), 2. Address/Phone (highlighted in green), 3. Dependents/Beneficiaries, 4. Employee Life, 5. Medical FSA, 6. Dependent FSA, 7. Designate Beneficiaries, and 8. Summary. The main content area is titled "Enter your stuff." and contains two buttons: "Exit Life Event" and "Continue >".

## Summary

Use the Life Events/New Hires application to record various life events that affect your human resource records, such as moving, adding a dependent, or getting married. As these events may require changes to several different areas of data, the application "interview" guides you through various screens where you provide data. Certain portions of the interview process and GUI are shared by all life events. The interface display for this interview application is divided into three areas:

- Interview Identification Area - Located in the upper left portion of the screen, this area identifies the interview that you are performing. For life events, it displays the name of the life event and the effective date.
- Interview Navigation Area - Running down the left portion of the screen, this area contains a navigation menu that displays the path of the pages you must navigate. Use it to jump to different pages.
- Application Area - Use this area to perform your task. Application pages displayed in this area are:
  - Selection Page - Use this page to select a life event.
  - Instructions Page - This page displays the Life Event instructions.
  - Module Pages - Use these pages to update your personal data and benefits.
  - Summary Page - This page displays a summary of life event changes and elections.
  - Misc. Page
  - Open Life Events Page - This page provides a list of currently open life events.
  - Recently Confirmed Life Events Page - This page provides a list of recently confirmed life events that are still within the change period

## Application Functions

The Life Events/New Hires interview presents you with data to edit as you navigate through one or more pages. The application functions are limited to the following:

- Exit Life Event(s) - Exit the application.
- Back - Navigate back one screen.
- Save - Save your edits in the current page and navigate to the next.
- Come Back Later - Deltek Time & Expense with Employee Self Service records that the page must be completed later and then navigates you to the next screen.
- Continue - Navigate from the instructions page into the life event.
- No Change - The system records that the page was not changed and then navigates you to the next screen.
- Confirm - Verify that you are finished with the Life Event.



## Application Contents

### Summary

This section describes the various fields, objects, and components displayed by each application.

### Background

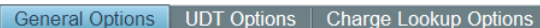
The application background is the space within the application area where the application resides. The background for Maintenance applications starts approximately 50 pixels below the application options area, while Process application backgrounds are centered on the application area. Backgrounds for Expense Reports and Expense Authorizations consist of the entire application area.



You can customize the background color of the application. See the Deltek Time & Expense with ESS Technical Guide for more information.

### Tabs

A tab represents a page of information. The number of tabs displayed varies depending on the application.



Tabs can be in one of three states:

- **Active** -- A tab is active when it displays information. There can be only one active tab in an application.
- **Inactive** --Inactive tabs appear behind the active tab. Click the tab to activate it.
- **Disabled** -- Disabled tabs display no information and cannot be activated. Tabs may be disabled because you do not have rights to the tab or because it is not currently required.

### Record Description

This field is a text label that displays the description/name of the record currently displayed. The record description is found primarily in maintenance applications.

### Group Box

Group boxes are boxed-off areas of the application where associated fields are located. A screen might display multiple group boxes.

### Field Label

Field labels identify a field. Field labels are always black. Required fields are followed by a red asterisk (\*).


### Edit Field

Enter values directly into the edit fields. Edit fields are bordered by a box and have a white background.


### Display Field

You cannot enter a value into a display field. Display fields are bordered by a black outline and have the same background color as the application.

**Lookup Field**

Lookup fields are like edit fields; however, Lookup buttons (  ) display to the right of the field. You can enter a value directly or select a value from Lookup.


**Date Field**

Date fields are like Lookup fields (you can also directly enter a year value). Click  to the right of the field to make your selection.

**URL Field**

Uniform Resource Locator (URL) fields are like edit fields. To edit a URL field, click the URL to the right of that field. To navigate to the URL, click the URL field.

**Email Field**

An email field is like an edit field. To edit the email field, click  to the right of that field. To access the mail system, click the email field.

**Drop-Down List**

You can select a value from a drop-down list by clicking the arrow button and selecting from the list. No entry is allowed in the field. The button may be disabled if the field is read-only.

**Check box**

Check boxes have a true or false value. Checkmarked (or selected) check boxes indicate true values.

**Button**

Active buttons display black text; disabled buttons display light gray text.

**Combo Box**

Combo boxes are fields where you can change a value by selecting the up or down arrow. These are usually numeric fields.

**Multiple Selection List**

Multiple selection lists contain items which you can select by clicking on them. Select multiple records by using Shift Click and Ctrl Click. These lists usually also offer **Select All** or **Deselect All** buttons.

**Tables**

Several applications contain tables. The table can have one or more columns and more than one row.

**Column Headings**

While column heading fonts are always white, you can customize the background color.

**Row Headings**

While row heading fonts are always white, you can customize the background color. Row headings for certain tables feature a check box (located to the left of the row). Selecting this

check box selects the check boxes for all rows in the grid. Clear this check box to clear the check boxes for all rows in the grid.

## **Grid**

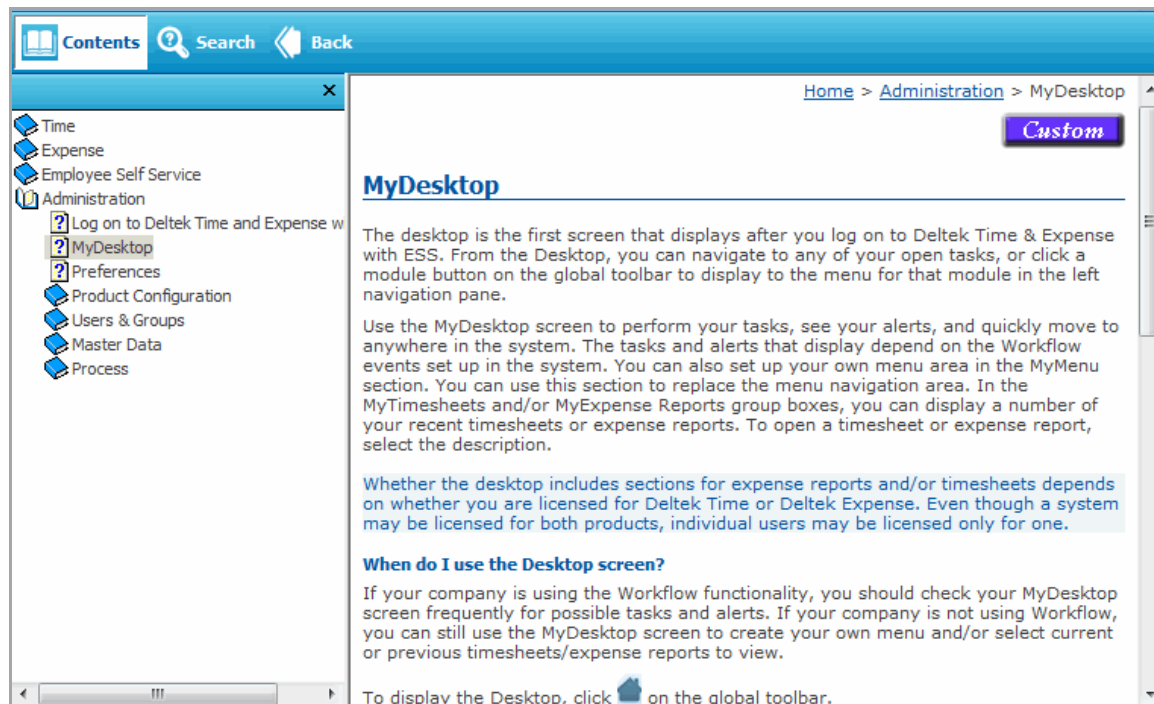
Grid columns may be resizable. For grids displaying check boxes to the left of each row, select the check box for the row or rows that you want to select. Clear the check box for the row or rows that you do not want to select.

## Miscellaneous User Interface


This section provides information on the following miscellaneous user interface components.

- Help Dialog
- Message Dialog
- Confirmation Dialog
- Search Dialog
- Simple Lookup Dialog box(Non-Dates)
- Simple Lookup Dialog box(Dates)
- About Deltek Time & Expense Dialog

### Help Dialog



### Summary

In the Global Options area, click  and select "Help" to launch Help in a second browser window. If the screen displays tabs, links are provided to the documentation for each tab.

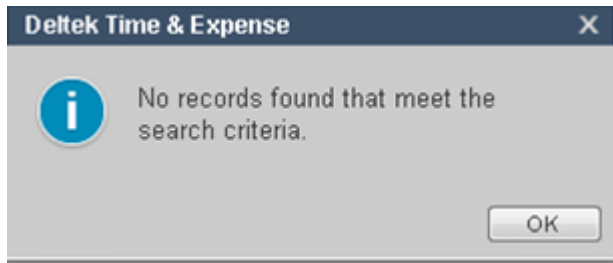
The user-defined table IDs display according to how you have them set up in the UDT Options tab of the General Configuration screen. For example, if you set up UDT01 as "Account," you will see "Account" as the UDT label in the help system.

The help that appears when you click the Help icon is specifically for the screen you are working in. If that screen has tabs, the main help topic provides links to topics for each of the tabs. If necessary, you can use the links in the navigation pane on the left side of the help window to go to other topics in the help system.

In a help topic, click on an individual field link to expand and display the field information. Click again to hide the text. All linked screens have a Back icon on the bottom of the page for returning to the parent screen.

A **Custom** button is available in the top-right corner at the beginning of many topics. Click **Custom** to launch your company's custom help file, if one exists. See the *Deltek Time & Expense with ESS Technical Guide* for more information on customizing your help files.

## Message Dialog



### Summary

The Message dialog box provides messages and warnings to the user. The three Message categories, with examples, are:

- Information - "Record Deleted" and "Record Added."
- Warning - "Vacation Balance Exceeded."
- Error - "Account cannot be blank."




The components of this dialog box are:

### Title

The title is the product name. While the text font is always white, you can configure the background color.

### Icon

Information, warning, and error messages are readily distinguished by their icons.

Icon	Purpose
	Information
	Warning
	Error

## Message Text

Message texts can be up to 254 characters. Message numbers are set off in parentheses.

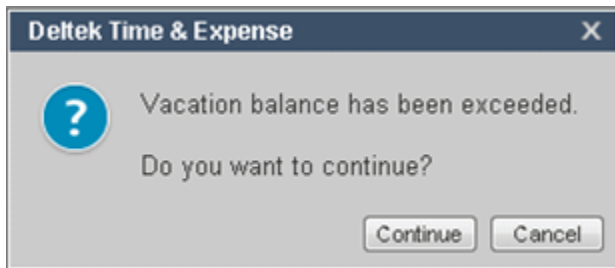
## OK

Click **OK** to return to the application.

## Details

For error messages, click **Details** to view additional information about the error.

## Confirmation Dialog




## Summary

The Confirmation dialog box prompts you to decide upon certain courses of action.

## Title

The title is the product name. While the text font is always white, you can configure the background color.

## Icon

The icon is a question mark .

## Message Text

Message texts can be up to 254 characters. Message numbers are set off in parentheses.

## Yes and No Buttons

Once you click **Yes** or **No**, you are returned to the application.

## Search Dialog

**Employee Search**

**Criteria**

Employee ID

Last Name

Active  ▼

Module Access  ▼

Sort By  ▼

**Results**

<input type="checkbox"/>	Employee ID	Employee Name
--------------------------	-------------	---------------

### Summary

Use the **Search** dialog box to filter the result set from either a Simple Form or Tabbed Form.

For example, from the Employee Information screen, you might select **Search** to filter the result set down to employee records meeting certain criteria (for example, all employees with the last name "Smith"). The sample screenshot shows you the resulting Search dialog box.

This dialog box varies in appearance depending on the application being searched. You can customize the background color.

## Criteria

This group box displays two useful fields for narrowing your search:

- Text

In Search text fields, you need enter only a portion of the text for which you are searching. For example, **Employee ID** (in the sample screen shot) is a text field and, therefore, you can enter all or part of the ID for your search. When you enter only a portion of the field name, the search function attempts to find all records that begin with the entered value. You can also enter a "%" at the beginning of search data. In this case, the search function will attempt to find all records that contain the entered value.

Please note that this field is optional. If you enter no value, the field will not be involved in the search criteria.

- Drop-Down List

Certain fields are limited to fixed values. Use drop-down lists (such as *Module Access* in the sample screen shot) to pick the value you want. Since the drop-down lists are required, an "ALL" option is provided. If you select "All," the field will not be involved in the search criteria.

## Sort By

Use the *Sort By* drop-down list to choose the ordering of the search results.

## Execute

Click **Execute** to perform the search based on the supplied criteria. The results display in the table grid.

## Select All

Click **Select All** to select all rows from the search. Once selected, this button will read **Deselect All**. To select a particular row, click the button to the left of the row to highlight it.

## OK

Click **OK** to import the selected rows into the application where the search originated.

## Cancel

Click **Cancel** to return to the application where the search originated.

## More

Click **More** to display additional records if the number of records found exceeds the number of rows that can be displayed in a search. You can set the maximum number of rows in the *Max Search Rows* field in the **General Options** tab of the **General Configuration** screen.



## Simple Lookup Dialog box (Non-Dates)

	UDT05 Run/Setup	Description
<input type="radio"/>	001	001
<input type="radio"/>	1000	Antifreeze
<input type="radio"/>	1001	Transmission fluid
<input type="radio"/>	1002	Leather cleaner
<input type="radio"/>	1003	Vinyl cleaner
<input type="radio"/>	1004	Power steering fluid
<input type="radio"/>	1005	Metall...

### Summary

Use the **Lookup** dialog box to look up a value for a specific field. Launch **Lookup** by clicking the button next to the field. You can customize the background color.

### Filter

The **Lookup** dialog box shows all records for the particular field in question. Use this group box to filter the rows or sort them in a different order.

### Filter/Sort by

The options in this drop-down list vary, depending on the application and the field you are looking up. Select the field for which you wish to see the result data filtered and sorted.

### Filter Text

Enter text here to filter the result data. If you enter only a portion of the field name, **Lookup** will find all records that begin with the entered values.



The text is not case-sensitive. For example, if you enter "abc," the lookup will also search for "ABC."

### Execute

Click **Execute** to perform the lookup based on the supplied filters. The results display in the table grid.

## OK

Select the row that you wish to use for your value by clicking the button to the left of that row. Then click **OK** to import the selected row back to the application where the lookup originated.

## Cancel

Click **Cancel** to return to the application where the lookup originated.

## More

This button displays if the number of records found during the lookup exceeds the number of rows that can be displayed in a Lookup. You can set the maximum number of rows in the **Max Lookup Rows** field in the **General Options** tab of the **General Configuration** screen.

## Simple Lookup (Dates)

The screenshot shows a 'Select a Date' dialog box with a calendar view for February and March 2009. The calendar is organized into two columns: February 2009 and March 2009. Each column has a header row with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat). The dates are displayed in a grid. The date 24th of March is highlighted in blue. At the bottom of the dialog, there are 'Cancel' and 'Today' buttons.

February 2009							March 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7	1	2	3	4	5	6	7
8	9	10	11	12	13	14	8	9	10	11	12	13	14
15	16	17	18	19	20	21	15	16	17	18	19	20	21
22	23	24	25	26	27	28	22	23	24	25	26	27	28
							29	30	31				

## Summary

The Calendar Lookup displays when you use **Lookup** in a date field. You can customize the background color of the dialog box as well as the highlighted date and text color.

## Month

Select the month from the drop-down list.

## Year

Use the scroll buttons to select a year. The options are "1950" through "2099."

## Navigation Arrows

Click the navigation arrow to the right of the **Year** to move the calendar forward to the first day of the following month. Click the navigation arrow to the left of the **Month** to move the calendar back to the first day of the previous month.

## Date

Select the date from the calendar.

## OK

Click **OK** to accept the selected date for your field and return to the application.

## Cancel

Click **Cancel** to return to your application without changing the date field.

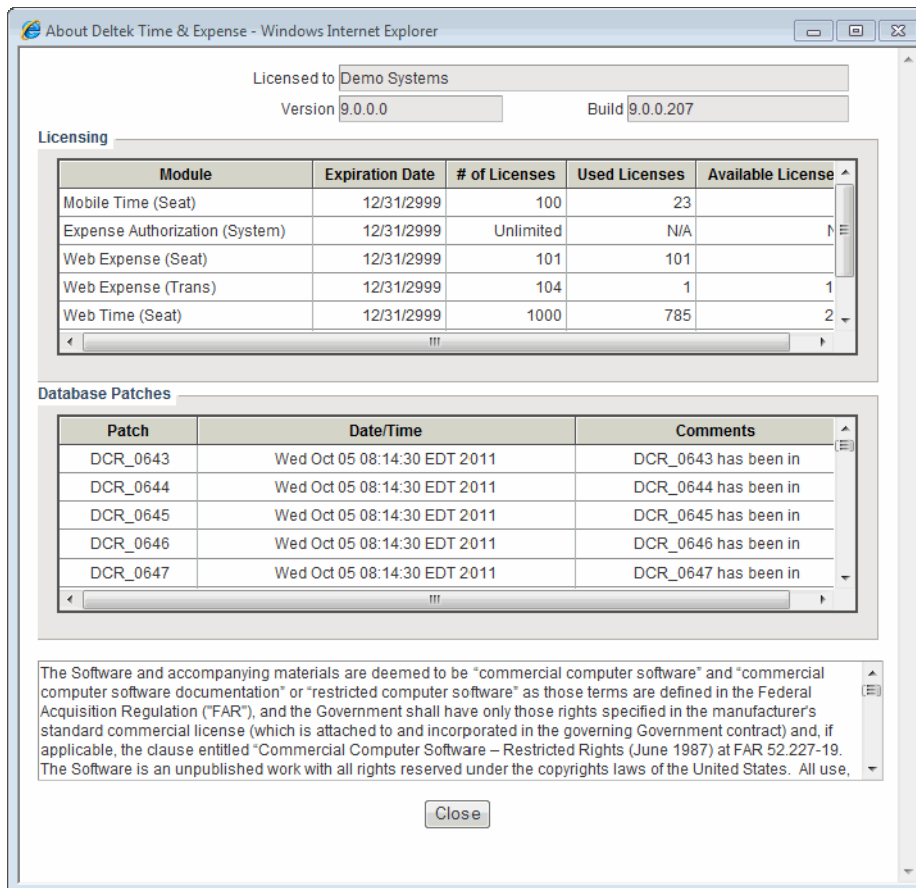
## Clear

Click **Clear** to return to your application and clear out the existing date field.

## Today

Click **Today** to select today's date in the calendar.

## About Deltek Time & Expense



## Summary

The About Deltek Time & Expense dialog box displays when you select the **About** icon in the global options area. This dialog box displays the version, build number, available licenses, and other information.

## Licensed to

This non-editable field displays your company name.

## Version

This non-editable field displays the currently installed version of Deltek Time & Expense with Employee Self Service.

## Build

This non-editable field displays the build number. Each time we create new or updated programs in Deltek Time & Expense with Employee Self Service, we assign a build number. This number helps identify the Deltek Time & Expense with Employee Self Service programs that your company is running. Be sure to have this build number at hand, along with the version number, when contacting our General or Technical support staff.

## Licensing

This non-editable table lists licensing information for Deltek Time & Expense with Employee Self Service. Each module can be licensed with either a seat license or transaction license basis.

## Module

This column displays the valid combinations of modules and types of licenses.

## Expiration Date

This non-editable field displays the expiration date for each license type and is based on the date contained in the license file. If the product is not on a trial license, the date that displays is far into the future, such as 12/31/2999. If it is on a trial license, the actual expiration date of the trial license displays.

## # of Licenses

This non-editable field displays the number of licenses your company owns for the module and type of license.

## Used Licenses

This non-editable field displays the number of your company's licenses currently in use. For seat-type licenses, this figure represents the number of employees who are assigned access to the module with a seat license. This information is contained in the Employee Information screen. For transaction licenses, Deltek Time & Expense with Employee Self Service tracks the number of timesheets or expense reports that have been saved by employees who were configured with a transactional license.

## Available Licenses

This non-editable field displays the available licenses for your company. Deltek Time & Expense with Employee Self Service calculates this value by subtracting the *Used Licenses* from the *# of Licenses*.

## Database Patches

This non-editable table lists all patches that have been applied to your company's database, displayed in alphabetical order based on the *Patch* column.

## **Patch**

This non-editable column displays the patch number (for example, PATCH064).

## **Date/Time**

This non-editable column displays the date and time on which the patch was applied to your system.

## **Comments**

This non-editable column displays a user-friendly explanation of the applied patch.

## **Confidential Information**

This non-editable field displays legal information about the use of the Deltek Time & Expense with Employee Self Service product.

## **Close**

Click **Close** to close the About Deltek Time & Expense dialog.

## Login Page

This guide assumes that you have already installed Deltek Time & Expense with Employee Self Service on your company's intranet or Internet. It also assumes that your computer meets system requirements for the operating system, browser, and other prerequisites. These requirements are outlined in the Install Instructions.

Once you open your browser, enter either the URL address for Deltek Time & Expense with Employee Self Service or use a link from your corporate Web site. Once you use the link, the login screen displays.



Deltek Time & Expense™  
with Employee Self-Service

Deltek Know more.  
Do more.™

Login ID

Password

[Forgot/Reset Password](#)

Domain

Language

☐ Change Password After Login

Login

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[Legal Statement](#)

## Login ID

Enter your login ID. Login IDs are assigned to employees within Deltek Time & Expense with Employee Self Service. The employee ID can serve as the login ID. Login IDs share the following attributes:

- Must be between 1 and 40 positions
- Supports alphanumeric characters
- Must be unique within the Domain
- Case sensitive



If your browser allows cookies, the last login ID used on your computer is defaulted.

---



Deltek Time & Expense with Employee Self Service supports two types of authentication. The first is data-based, and the second is LDAP-based.

The data-based authentication validates the user and the login using tables with Deltek Time & Expense with Employee Self Service.

LDAP based authentication validates the user on outside LDAP service. For further information, see the Deltek Time & Expense with ESS Technical Guide.

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## Password

Enter your login ID. Login IDs are assigned to employees within Deltek Time & Expense with Employee Self Service. The employee ID can serve as the login ID. Login IDs have the following attributes:

- Not displayed as typed
  - Encrypted (stored and communicated)
  - Configurable minimum length (1 to 40)
  - Maximum length (40)
  - Case Sensitive
  - Configurable expiration (0, 30, 60, 90, 180, or 360 days)
  - Can be configured to require at least one special character (!, @, #, \$, and others)
  - Can be configured to require at least one numeric character (1, 2, 3, and others)
  - Can be configured to prohibit reuse of old passwords
  - Can be configured to require a mix of uppercase and lowercase characters
- 



The browser does not remember passwords.

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With data-based authentication, if your administrator includes dashes in the *Government ID* field in the Employee Information screen, you must enter the dashes when you initially log on to Deltek Time & Expense with Employee Self Service.

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## Forgot/Reset Password?

Click this link if you can't remember your password. The Password Self Reset displays, where you must provide your Login ID and Domain. You then must correctly answer a pre-established security question. If this information passes validation, a temporary password is sent to your e-mail account, or if your e-mail address is not available in Time & Expense, your password is reset to your Government ID. If you do not know your Government ID, contact your system administrator. In either case, you will be required to change your temporary password after you log on.

## Domain

Depending on your configuration, this field may not display. If it does display, you can specify which system you want to use. Domains represent different data sets. They can represent different companies or data sets such as Production, Test, or Training.

Domains have the following attributes:

- Must be between 1 and 30 positions
- Not case sensitive



If your browser allows cookies, the last Domain entered on your computer is defaulted.

---

## Language

Select your preferred language and locale from this drop-down list. When you change the locale, the language for field labels on the login screen change to match the locale you selected.

Choices include the following:

- Deutsch/Deutschland
- English/Australia
- English/United Kingdom
- English/United States
- Espanol/Espana
- Espanol/Estados Unidos
- Le Francais/La France
- Nederlands/Nederland

If you select a Language that is not configured for your chosen domain, an error message displays, alerting you that the language is unavailable. The Login screen defaults to "English/United States."



If your browser allows cookies, Deltek Time and Expense with Employee Self Service remembers your language/locale preference. Otherwise, English is the default language.

---

## Change Password After Login

If you select this check box, the system will display a change password dialog after successful login. You must verify the new password by entering it twice. The password must conform to the password policies as configured in the Password Settings group box in the General Options tab of the General Configuration screen.



This option will launch the change password dialog only if you are using data-based authentication.

---





If you are logging in to a new system where no information is set up, the valid login information is as follows:

Login ID: install

Password: password

Domain: Depends on what name was assigned during installation.

---

## Login

After you have completed the *Login ID*, *Password*, and *Domain* fields, select this icon to submit your login information. If the information is invalid, Deltek Time & Expense with Employee Self Service displays an error dialog. If your system uses data-based authentication and you are logging in for the first time, you must change your password. Upon subsequent logins, you will be taken to your default screen as defined in your preferences.

---



In the General Options tab of the General Configuration screen, you can configure the number of invalid login attempts before the Login ID is disabled. The valid values are 3, 4, or 5.

---

## Select Time Zone

This dialog box displays when users log in to Deltek Time & Expense with Employee Self Service for the first time. They will be required to select the time zone in which they are located.

---



In Internet Explorer 7, opening a new browser window starts a new session. Starting with Internet Explorer 8, this is no longer the case.

You cannot programmatically force Internet Explorer 8 to open a new session from the Time and Expense application.

**To ensure that a new session is opened while running Internet Explorer 8 or above, complete one of the following steps:**

1. From the Internet Explorer menu bar, click **File » New Session**. A new browser window opens with a new session.  
  
If the **File** menu is not visible, you can activate the menu bar toolbar by clicking **Tools » Toolbars » Menu Bar**.

OR

2. Start Internet Explorer 8 or above from a desktop shortcut with "-noframemerging" added to the command line. **To set up the desktop shortcut, complete the following steps:**
    - Right-click the Time & Expense executable and select **Send to » Desktop (create shortcut)**.
    - Right-click the shortcut on the desktop and click **Properties**. The Shortcut Properties window displays.
    - Go to the Shortcut tab. In the **Start in:** field, add **-noframemerging** to the file path. It should say something like this:  
  
**"C:\Program Files (x86)\Internet Explorer\iexplore.exe" -noframemerging**
-

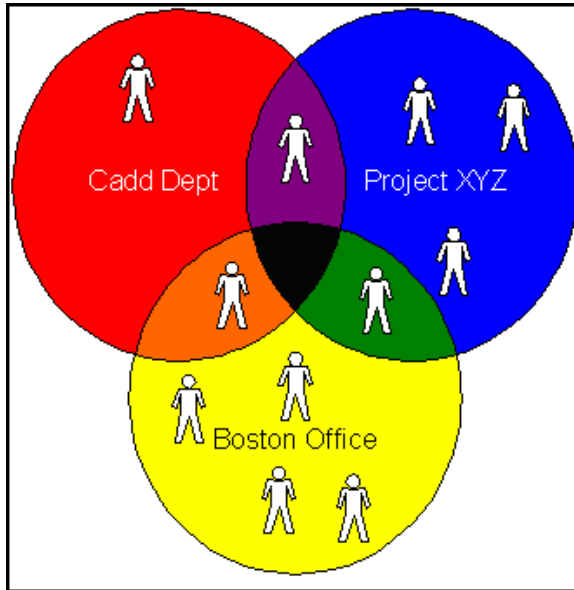
## Employee Groups

In the Employee Groups screen, you can organize your employees into defined groups to accomplish the following:

- Define your organization to Deltek Time & Expense with Employee Self Service.
- Assign employees to supervisors/administrators.
- Assign/restrict employees to charges.
- Set up standard charge favorites
- Provide employee selection criteria for reports and exports.

An employee group can represent departments, offices, divisions, and projects. In general:

- Employees can belong to multiple groups.
- You can assign supervisors/administrators to multiple groups.
- You can assign charges to multiple groups.
- Groups may or may not have supervisors/administrators or charges assigned.



## Group Types

You can categorize groups by type. For example, you might create a group type called "Department" and assign all groups that represent departments to that type.



Deltek Time & Expense with Employee Self Service uses group types to filter the list of groups displayed. You can restrict an employee to one group of this type, so that, when you add an employee to a group of this type, the employee is automatically removed from any other group of the same type.

## Members vs. Owners

Groups might contain employees associated with a group (members) and employees who have domain over the group (Owners). Group members inherit both the charges and owners assigned to the group, whereas owners have rights and are assigned roles over the members of the group. These roles have pre-defined rights. Examples of an owner are "Primary Supervisor," "HR Manager," or "Office Manager." For more information about these roles, see the "Functional Role" section later in this document.

## Employee Group Examples

With the general concepts outlined, let's look at some examples of employee groups.

## Employee Groups by Primary Supervisor

Employees are often grouped by primary supervisor. By using such groups, you can assign employees to primary and backup supervisors. Common attributes for this type of group are:

- The group ID is the primary supervisor's employee ID.
- The group type restricts membership to one group of this type.
- One primary supervisor is assigned appropriate modification and approval authority.
- One or more backup supervisors are assigned appropriate modification and approval authority.
- Charges are not usually granted in this type of group.

## Employee Groups by Department/Organizational Unit

Groups are also commonly organized around departments and organizational levels. If your organization has many levels or tiers, you can define each level as a group type and create groups for every unit on each level. With such groups, you can:

- Group employees for reporting.
- Assign administrators responsible for monitoring the department/organizational unit.
- Assign charges that are common for the department/organization, such as overhead and leave.
- Assign backup supervisors.

Common attributes for this type of group are:

- The group ID can be a department/organizational code.
- The group type restricts membership to one group of this type (level).
- One primary administrator is assigned appropriate modification and approval authority.
- One or more backup administrators are assigned appropriate modification and approval authority.
- You can assign overhead charges to the group, and in some circumstances, direct project charges.

## Employee Groups by Company/Division

Groups based on high-level organizational units serve the same purposes as those based on lower levels. Additional advantages include:

- You will have more selection criteria during the export of expense reports.
- You can restrict which employee databases an administrator can view.

Common attributes for this type of group are as follows:

- The group ID can be the company/division code.
- The group type restricts membership to one group of this type.
- One primary administrator is assigned appropriate modification and approval authority.
- One or more backup administrators are assigned appropriate modification and approval authority.

- You can grant charges at this level, especially if you need to prevent one company/division from charging another company/division's charges. Please note that the charges should have "office" as a part of their hierarchy.

## Employee Groups by Office

Groups based on office location operate like any other organizational unit except that they are based on location. Typically, companies assign administrators that are responsible for a specific office's expense reports. It is also common to have certain charges that are office-related.

Common attributes for this type of group are:

- The group ID can be the office code.
- The group type restricts membership to one group of this type.
- One primary administrator is assigned appropriate modification and approval authority.
- One or more backup administrators are assigned appropriate modification and approval authority.
- You can grant charges at this level, especially if you need to prevent one office from charging another office's charges. Please note that the charges should have "office" as a part of their hierarchy.

## Employee Groups by Project

Groups based on projects do not have "owners," apart from the project manager or client. More often than not, companies create groups by project to provide some type of charge control.

Common attributes for this type of group are:

- The group ID can be the project ID.
- The group type does not restrict membership to one group of this type.
- You can grant charges at this level, especially if you need to define a project-level workforce. Please note that the charges should have "office" as a part of their hierarchy.

## Employee Groups by Type of Employee

Groups based on the type of employee also provide certain advantages. For example, you might create a group comprised of "Senior Engineers." The main purpose of this type of group is reporting. Common attributes for this type of group are:

- The group ID can be the employee type code.
- The group type restricts membership to one group of this type.
- You can grant charges at this level.

## Maintaining Employee Groups

Given their importance and complexity, maintaining employee groups can pose a significant challenge. Currently, you can maintain them using two methods:

- Manually, through Deltek Time & Expense with Employee Self Service, or
- Automatically, via the user interface

Unless you have an outside application that stores such organizational information, you will need to maintain it within Deltek Time & Expense with Employee Self Service. If most of the data reside

in outside systems, however, you can perform the bulk of the maintenance through the Deltek Time & Expense with Employee Self Service interface.

Using the fields displayed in the Employee Information tab in the Export Data to Deltek Time and Expense screen, Costpoint provides an interface that can create the following employee groups:

- Company
- Org (Every Level)
- Supervisor
- Manager

Employees are segregated into the appropriate groups based on the data in Costpoint. However, the only group types for which Deltek Time & Expense with Employee Self Service will create "Primary Supervisor" roles are:

- Org — If org managers are assigned in Costpoint.
- Manager — If managers are assigned in the Manage Employee Salary Information screen in Costpoint.

## Functional Roles

Use the Functional Roles screen to define common permissions over employees and/or charges. For example, you can create functional roles for supervisors, administrators, project managers, or contract administrators. There are three types of functional roles:

- **Employee** — This type of functional role has domain or access over employees. In the Employee Groups screen, you can define the employees for which a specific role has permissions. You can also use employee groups to define which users have that role.
- **Charge** — This type of functional role has domain or access over charges (UDT02 or UDT01). In the UDT02 or UDT01 screens, you can define the charges (UDT02 or UDT01) for which a specific role has permissions. Also, use these screens to define which users have that role.
- **Employee and Charge** — This type of functional role has domain or access over both employees and charges.

A supervisor is normally an "employee" type role. In the Employee Groups screen, you can define certain users as supervisors for specific employee groups. A project manager is normally a "charge" type role. In the Project (UDT02) screen, you can define certain users as project managers for specific projects.

## Permissions

When you assign a user a role in relation to a group of employees or a specific charge, that user inherits the permissions configured for the role. The types of permissions that you can assign to a functional role (in the Functional Roles screen in Administration) are:

### General Permissions (Basic Information tab)

- **Modify Charges** — Determines whether users with this role can modify the charge in the UDT02/UDT01 master screen. With this permission, a user can change information such as start date, end date, active flag, and others.
- **Approve Charges** — Determines whether users with this role can approve hours charged to the UDT02/UDT01. This permission will apply only if UDT02/UDT01 is configured for line-level approval.
- **Modify Employee Data** — Determines whether users with this role can modify the Employee Master screen for employees in specific groups.
- **Modify Employee Group** — Determines whether users with this role can modify specific employee groups. With this permission, a user can add/remove employees, add/remove other owners (roles), and change charge tree access for specific groups.
- **Delegation** — Determines whether users with this role can assign their roles to someone else for a specific period of time. For example, a primary supervisor can delegate his roles to a backup supervisor while on vacation, causing the backup supervisor to receive the primary supervisor's workflow. The settings in this screen determine whether the role can be delegated, and to whom.

### Deltek Time Permissions (Timesheet Rights tab)

- **View Timesheet** — Determines whether users with this role can view the timesheets of employees within specific employee groups.

- **Modify Timesheet** — Determines whether users with this role can modify the timesheets of employees within specific employee groups.
- **Approve Timesheet** — Determines whether users with this role can approve/reject the timesheets of employees within specific employee groups.
- **Load Employee Favorites** — Determines whether users with this role will have favorites loaded automatically when they view a missing timesheet of employees within specific employee groups.
- **View Work Schedule** — Determines whether users with this role can view the work schedule of employees within specific employee groups.
- **Modify Work Schedule** — Determines whether users with this role can modify the work schedule of employees within specific employee groups.
- **Approve Work Schedule** — Determines whether users with this role can approve/reject employees' leave request within specific employee groups.
- **View Rate 1** — Determines whether users with this role can view the user-defined Rate 1 on timesheets for employees within specific employee groups. Rate 1 is typically used for labor rates, and this information should be restricted. This permission applies only if you have populated Deltek Time & Expense with Employee Self Service with such rates and enabled labor costing.
- **Modify Rate 1** — Determines whether users with this role can modify the user-defined Rate 1 on timesheets for employees within specific employee groups. Rate 1 is typically used for labor rates, so this information should be restricted. This permission applies only if you have populated Deltek Time & Expense with Employee Self Service with such rates and enabled labor costing.
- **View Rate 2** — Determines whether users with this role can view the user-defined Rate 2 on timesheets for employees within specific employee groups. Rate 2 is typically used for billing rates. This permission applies only if you have populated Deltek Time & Expense with Employee Self Service with such rates and enabled labor costing.
- **Modify Rate 2** — Determines whether users with this role can modify the user-defined Rate 2 on timesheets for employees within specific employee groups. Rate 2 is typically used for billing rates. This permission applies only if you have populated Deltek Time & Expense with Employee Self Service with such rates and enabled labor costing.

### **Deltek Expense Permissions (Expense Rights tab)**

- **Create Expense Report** — Determines whether users with this role can create expense reports for employees within specific employee groups.
- **View Expense Report** — Determines whether users with this role can view the expense reports of employees within specific employee groups.
- **Modify Expense Report** — Determines whether users with this role can modify the expense reports of employees within specific employee groups.
- **Approve Expense Report** — Determines whether users with this role can approve/reject the expense reports of employees within specific employee groups.
- **Void Expense Report** — Determines whether users with this role can void expense reports of employees within specific employee groups.
- **Record Attachments** — Determines whether users with this role can record receipts received for expense reports of employees within specific employee groups.

Functional Roles

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- **Image Attachments** — Determines whether users with this role can load receipt images for expense reports of employees within specific employee groups.
  - **View Attachments** — Determines whether users with this role can view receipt images for expense reports of employees within specific employee groups.
- 



The initial version of Deltek Employee Self Service 7.1 does not contain permissions particular to Employee Self Service. For later versions, it is our intent to define several permissions within the Functional Role screen for Self Service. These may include:

- View Employee Education, Skills, & Training.
  - Modify Employee Education, Skills, & Training.
  - Approve Employee Education, Skills, & Training.
  - Approve Life Events.
  - Approve Benefit Enrollment.
-



## Security Roles

Use the Security Roles screen in Administration to organize application screen rights into common roles within Deltek Time & Expense with Employee Self Service. For example, you can create security roles for employees, HR staff, or project managers. Each role can have preset access to certain screens. You can define this access as "Full Rights," "Browse Only," or "No Rights." Once you have set up an employee, use the Employee Information screen in the Users & Groups menu to assign the employee a role. New employees are assigned a default role using the value from the General Configuration screen.



Users who are not licensed for certain modules (Deltek Expense, Deltek Time, Deltek Self Service) will not be able to view the screens related to that module, even if their security roles grant them such access. See the "Licensing" section in this document for a list of screens.



The Security Roles function replaces the concept of Class of Service in Costpoint and previous versions of Employee Self Service. Use the Security Roles screen to determine whether an employee has access to particular screens in Deltek Self Service.

## Apply Employee Level Security

Besides setting access rights for screens, you can activate Employee Level Security for certain roles. Employee Level Security filters the employees a user sees in the Employee Information and Employee Groups screens. These two screens are mainly used by administrators. A super administrator can use this feature to limit the individual administrators to a manageable pool of employees that can be more easily maintained. You can find a more detailed discussion of this feature in the online help.



In all other screens, users will see only those employees to which their Functional Roles have access.

## Apply Charge Level Security

You can activate Charge Level Security for certain roles. Charge Level Security filters the UDT01 (Accounts) and/or UDT02 (Projects) a user views in the UDT01 and UDT02 screens in the Administration/Master Data menu. These two screens are mainly used by administrators. A super administrator can use this feature to limit the individual administrators to a manageable pool of charges. You can find a more detailed discussion of this feature in the online help.

## Modify Employee Role

This feature controls whether users with this security role can change another employee's security role within the Employee Information screen in Administration. For this setting to apply, the security role must have rights to the Employee Information screen.

## Modify Time Zone

This feature controls whether users with this security role can change their time zone within their Preferences screen. For this setting to apply, the security role must have rights to the Preferences screen.



If employees do not have a time zone assigned when they first log in to Deltek Time & Expense with Employee Self Service, they will be asked to select one after successfully logging in the first time.

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## Allow Delegation

This feature controls whether users with this security role can delegate their roles/responsibilities. A user cannot delegate if he does not have the correct roles over employees/groups or if his roles are not set up for delegation.

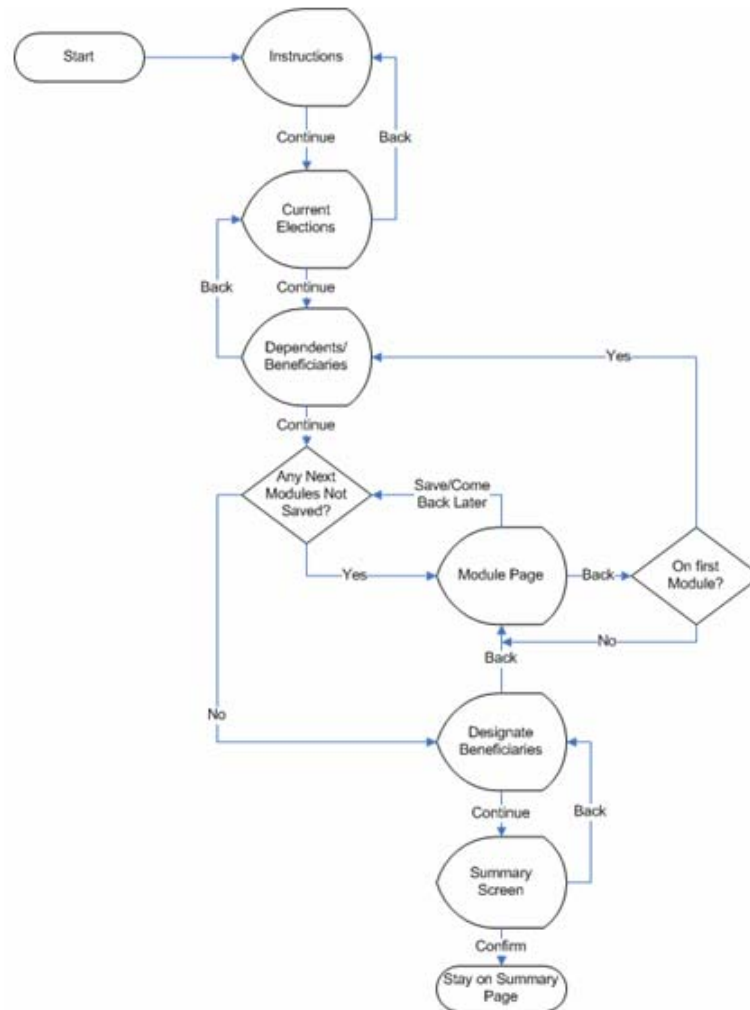
## Benefits Enrollment

Benefits Enrollment requires employees to navigate through several pages to complete enrollment.

In the Benefits Enrollment screen:

- Employees are guided through each screen and cannot skip steps.
- Once a summary of choices displays at the end of the flow, employees click Confirm.
- Employees cannot click Confirm until they have saved each election page.
- Benefit changes are held in a pending table until the administrator activates them.
- The Benefits Enrollment flow is system-defined and includes only benefits data.
- Employees can, after clicking Confirm, return to the main Benefits Enrollment screen and make other changes within the open enrollment period.

## Benefits Enrollment Flow



The Benefits Enrollment flowchart gives an overview of the screens employees usually encounter when navigating through the Benefits Enrollment process. It is made of decision points and page indicators. The decision points, labeled in terms of the question at hand, are:

- **Any Next Modules Not Saved?** Are there any Module pages where the employee clicked **Come Back Later** and so did not complete the Benefits Enrollment flow? When employees click **Come Back Later**, their changes are not saved. They must therefore revisit the Benefits Enrollment screen, specifically the pages that retain a Come Back Later status, to confirm their Benefits Election(s). If these employees do not complete the Benefits Enrollment flow (by marking at least one page with **Come Back Later**), they will, upon reentering the Benefits Enrollment screen, be taken to the Summary screen to complete the flow.



If an employee exits in the middle of the flow and later returns to the Benefits Enrollment screen, he will be taken to the unsaved Module page(s).

- **On First Module?** This determines the page to which the user will be directed after clicking **Back** on the Module page:
  - One Page Found — Navigate to that page.
  - More than One Page — Dependents and Beneficiaries page.

The "pages" in the flowchart are the various screens that employees must navigate to complete the Benefits Enrollment process. The following are examples of the screens employees may encounter:

## Instructions Page

This page is the first screen the employee encounters in the Benefits Enrollment process. You can edit the instructions on this page by using the Custom Text screen (see the Deltek Self Service online Help). After clicking **Continue**, the employee moves to the Current Elections table (Step 2) in the Life Events user flow.

## Current Elections

**Jastillana, Karen I. (KAREN)**

Plan Start Date: Jan 3, 2012  
Plan End Date: Jan 2, 2013

1. Instructions  
2. **Current Elections**  
3. Dependents/Beneficiaries  
4. Dependent FSA  
5. Medical FSA  
6. Other Benefits  
7. Employee Life  
8. Accidental Death & Dismemberment  
9. Dependent Life  
10. Supplemental Life  
11. Supplemental AD&D  
12. Spouse Life  
13. Medical Benefits

These are the plans and options in effect before the open enrollment process. You may choose to rollover all of your current benefits to the new year by checking the checkbox in the header row. Or you can pick which plans you wish to rollover to the new year by checking the checkbox beside each Benefit plan.

	Benefit	Plan	Coverage Level	Current Plan Year Semi-Monthly	New Plan Year Semi-Monthly
<input type="checkbox"/>	Dependent FSA		123.00	5.13	5.13
<input type="checkbox"/>	Medical FSA		444.00	18.50	18.50
<input type="checkbox"/>	Accidental Death & Dismemberment	AD & D	Accidental Death/Dismemberment	5.00	N/A
	<b>Total</b>			<b>28.63</b>	

Exit Benefits Enrollment < Back Continue >

In the second screen, the employee reviews existing benefit elections. No changes to current elections can be made here.

## Dependents/Beneficiaries

**Jastillana, Karen I. (KAREN)**

Plan Start Date: Jan 3, 2012  
Plan End Date: Jan 2, 2013

1. Instructions  
2. Current Elections  
3. **Dependents/Beneficiaries**  
4. Dependent FSA  
5. Medical FSA  
6. Other Benefits  
7. Employee Life  
8. Accidental Death & Dismemberment  
9. Dependent Life  
10. Supplemental Life  
11. Supplemental AD&D  
12. Spouse Life  
13. Medical Benefits

Add Dependents/Beneficiaries Edit Dependents/Beneficiaries View Inactive

Active Dependents/Beneficiaries						
Name	Relationship	SSN / Government ID	Gender	Date of Birth / Agreement	Type	
<input type="checkbox"/> CHILD1F CHILD1L	Daughter	896-51-3286	Female	May 16, 2008	Dependent & Beneficiary	Inactivate
<input type="checkbox"/> CHILD2F CHILD2L	Daughter	456546513	Female	Jul 22, 1996	Dependent & Beneficiary	Inactivate
<input type="checkbox"/> New Kid	Daughter	000-00-0000	Female	Mar 1, 2012	Dependent & Beneficiary	Inactivate

Exit Benefits Enrollment < Back Done >

This page identifies the employee's dependents and beneficiaries for each applicable plan. Here employees can add, edit, activate, and inactivate their dependents and beneficiaries.

## Module Page

**Jastillana, Karen I. (KAREN)**

Plan Start Date: Jan 3, 2012  
Plan End Date: Jan 2, 2013

- Instructions
- Current Elections
- Dependents/Beneficiaries
- Dependent FSA
- Medical FSA
- Other Benefits
- Employee Life
- Accidental Death & Dismemberment
- Dependent Life
- Supplemental Life
- Supplemental AD&D
- Spouse Life
- Medical Benefits**

**Current Coverage**

You are currently not covered under a benefit plan. To enroll, please make a selection below and click the "Save" button.

**Enroll in New Coverage**

Medical Plan	Employee Medical	Employee Plus 1 Dependent Med	Family Medical	No Coverage
Health Plan Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health Ins	<input type="radio"/> 15.00	<input type="radio"/> 90.00	<input type="radio"/> 10.00	<input checked="" type="radio"/> -15.00
Medical Insurance	<input type="radio"/> 25.00	<input type="radio"/> 40.00	<input type="radio"/> 75.00	<input type="radio"/> -25.00

\* Premiums are Semi-Monthly \*

**Dependent Information**

Covered?	Dependent	Relationship
<input type="checkbox"/>	CHILD1F CHILD1L	Daughter
<input type="checkbox"/>	CHILD2F CHILD2L	Daughter
<input type="checkbox"/>	New Kid	Daughter

To activate/inactivate dependent coverage, click on checkbox above.

Exit Benefits Enrollment < Back Save >

Between the Dependents/Beneficiaries screen and the Designate Beneficiaries screen, one or more Module screens may appear. Which Module screens display is determined by the benefit options defined in Costpoint. When employees click either **Come Back Later** or **Save** on each page, they are forwarded to the Summary screen. Examples of (benefit) Module screens are Medical Benefits (shown above), Dental Benefits, Employee Life, and Short Term Disability.

## Designate Beneficiaries

**Jastillana, Karen I. (KAREN)**

Plan Start Date: Jan 3, 2012  
Plan End Date: Jan 2, 2013

- Instructions
- Current Elections
- Dependents/Beneficiaries
- Dependent FSA
- Medical FSA
- Other Benefits
- Employee Life
- Accidental Death & Dismemberment
- Dependent Life
- Supplemental Life
- Supplemental AD&D
- Spouse Life
- Medical Benefits**

**Current Benefit Plans**

Plan	Beneficiary	Relationship	Type	Allocation %
AD & D	CHILD1F CHILD1L	Daughter	Contingent	100.00
	CHILD2F CHILD2L	Daughter	Primary	100.00
	New Kid	Daughter	Neither	0.00

There are no new benefits and/or beneficiaries on record.

Exit Benefits Enrollment < Back Save >

Use the Designate Beneficiaries screen module to specify the beneficiary type and allocation percent for each beneficiary for each plan.

## Summary Screen

**Jastillana, Karen I. (KAREN)**

Plan Start Date: Jan 3, 2012  
Plan End Date: Jan 2, 2013

1. Instructions  
2. Current Elections  
3. Dependents/Beneficiaries  
4. Dependent FSA  
5. Medical FSA  
6. Other Benefits  
7. Employee Life  
8. Accidental Death & Dismemberment  
9. Dependent Life  
10. Supplemental Life  
11. Supplemental AD&O  
12. Spouse Life  
13. Medical Benefits

Your summary below lists the elections you have made during the enrollment process. The dollar amount shown reflects the amount to be deducted from your pay check each period. To change any of your elections, choose the appropriate benefit type on the navigation menu on the left or click the appropriate Benefit hyperlink below.

Benefit	Plan	Coverage Level	Semi-Monthly	Status	Confirmed
Dependent FSA		130.30	5.43	Saved	Yes
Medical FSA		2,407.30	100.31	Saved	Yes
Other Benefits	PPO Network	Dependant Life Insurance	0.00	Saved	Yes
Other Benefits	Other Benefit	No Coverage	0.00	Saved	Yes
Employee Life	Life Insurance	No Coverage	0.00	Saved	Yes
Accidental Death & Dismemberment	AD & D Ins for K	No Coverage	0.00	Saved	Yes
Dependent Life	Dependent Life Ins	No Coverage	0.00	Saved	Yes
Supplemental Life	K Supp Life	No Coverage	-3.16	Saved	Yes
Supplemental AD&O	Another Supplemental AD&O	No Coverage	0.00	Saved	Yes
Spouse Life	Better Half Benefit	No Coverage	-0.50	Saved	Yes
Medical Benefits	Health Ins	No Coverage	-15.00	Saved	Yes
Dental Benefits	Dental	No Coverage	0.00	Saved	Yes
Vision Benefits	Kaiser Vision Plan	No Coverage	0.00	Saved	Yes
<b>Total</b>			<b>87.08</b>		

Exit Benefits Enrollment Confirm

This page provides a summary of elections that the employee made during the enrollment process. The Summary screen can be accessed in three different ways:

- During normal navigation through the Benefits Enrollment process.
- Employees return to the Benefits Enrollment screen without confirming their choices, but have either saved or clicked **Come Back Later** for all Module screens.
- Employees enter the Benefits Enrollment process after the enrollment period is closed. In this case, the Summary page will have a different appearance and functionality.



## Life Events/New Hires

Here employees record various life events that affect their personal, payroll, and/or benefit information. Examples of events requiring the Life Events process include a new employee completing the new hire process, or a current employee making changes to existing information because of a marriage or the birth of a baby. (See Appendix B: Life Event Processing for more information.)

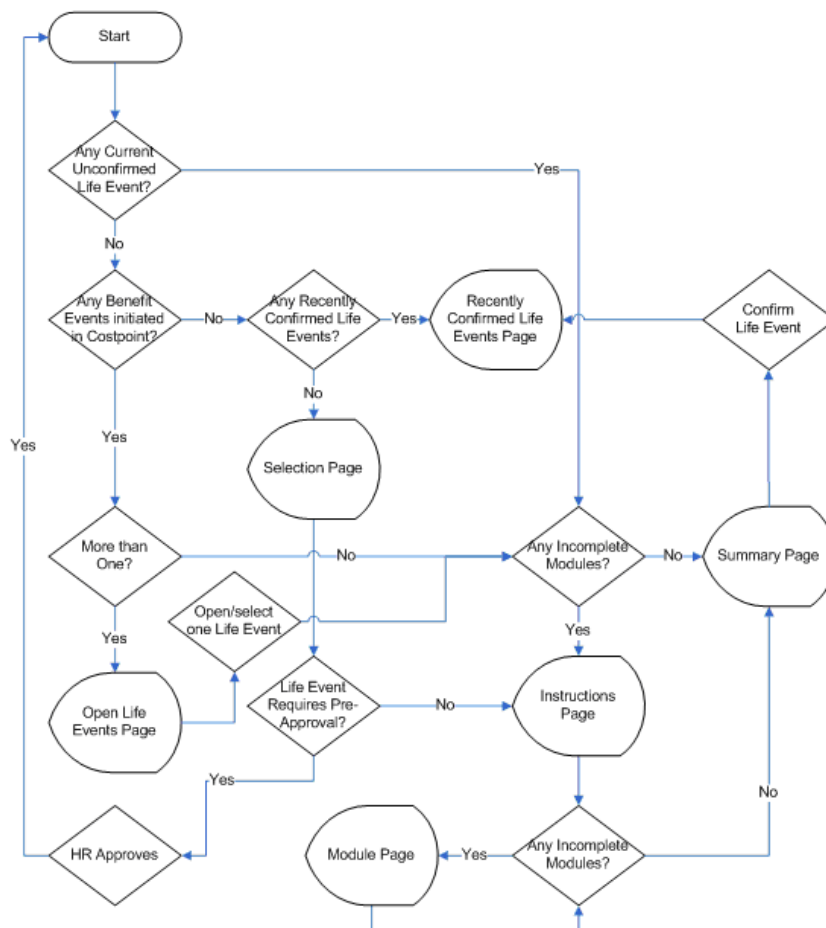
The Life Events process is similar to the Open Enrollment process in several ways:

- Employees are guided through each page and cannot skip steps.
- Employees view a summary of choices and click Confirm at the end of the flow.
- Employees cannot confirm until they have clicked either No Change or Save on each election page.
- Benefit changes are held in a pending table until the administrator activates them.

The Life Events process differs from the Open Enrollment process in a few key ways:

- Flows are user-defined in Costpoint under the Life Events flow; they are not system-defined.
- Life Events flows may include personal and payroll data in addition to benefits data.
- The open period for entering the Life Events process is defined by comparing the date of the event and the entry in the Change Period Days field in Costpoint's Manage Life Event Codes screen.
- Employees can be launched into a "Move" life event by changing their addresses.
- After clicking Confirm, an employee cannot return and make additional changes to that life event, but must instead start a new one.
- The Life Events process may be set up to require approval after the event is entered and before the employee proceeds through the Life Event flow.

## Life Event Flow



The above Life Event flowchart provides an overview of the pages most users encounter during the Life Event process. The flowchart is made of decision points and page indicators. The decision points, labeled in the form of the question at hand, are as follows:

- Any Current Unconfirmed Life Events? — Is there a Life Event process already started by the employee, in which the employee has not clicked Confirm, and is within its change period?
- Any Benefit Events initiated in Costpoint? — In this step, Deltek Time & Expense with Employee Self Service checks whether the HR department has initiated a Life Event process in Costpoint Benefits for which a user flow has not been created in Deltek Self Service.
- Any Recently Confirmed Life Events? — Did the employee recently undertake the Life Event process and click Confirm?
- More than One? — Is there more than one Life Event process already in progress in which the employee has not clicked Confirm? In such cases the employee is directed to the Open Life Events page.

- Any Incomplete Modules? — Are there any pages in the Life Events flow in which the employee has not clicked either No Change, Come Back Later, or Save? If an employee has gone through the Life Events flow but did not click any of those buttons for one or more of the pages, that employee must return to the Instructions page. Employees who have completed all required Module pages are forwarded to the Summary Page.
- Life Event Requires Pre-Approval? — When configuring the ESS Life Event Setup screen, you can require approval of a Life Events process. This applies to Life Events flows that require HR intervention (so that, for instance, the employee cannot move forward without HR Administrator approval).
- HR Approves — Once HR grants approval for the Life Event process, the employee can return to the Instructions page in the Life Events flow to finish.

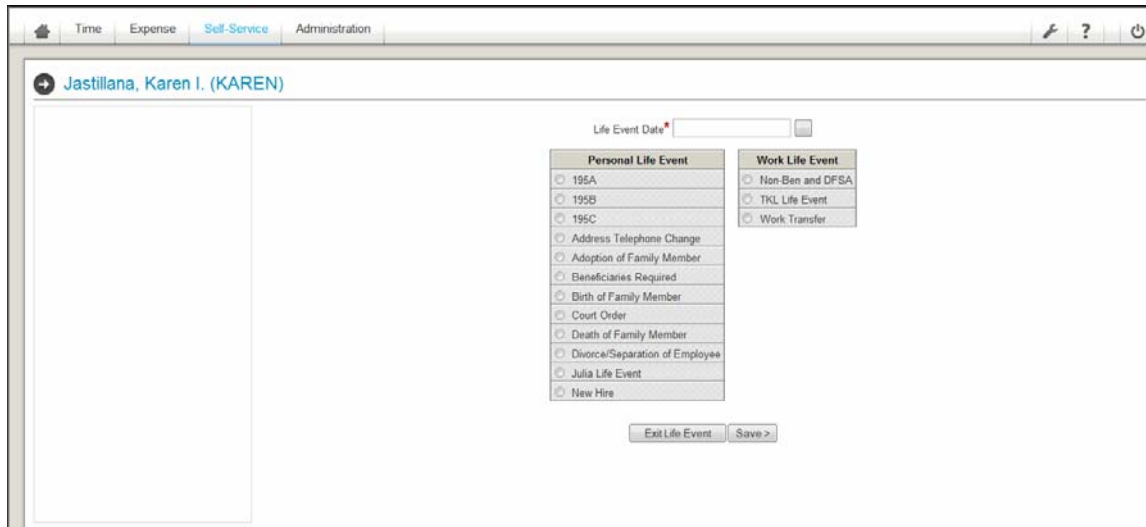
The pages in the flowchart are the various screens employees must navigate to complete a Life Event process. Below are examples of screens most employees encounter:

## Recently Confirmed Life Events



This page provides a list of recently confirmed Life Events processes that are still within the change period. In addition to viewing these, the employee can start a new Life Event process by clicking **Create New Life Event**.

## Create New Life Event



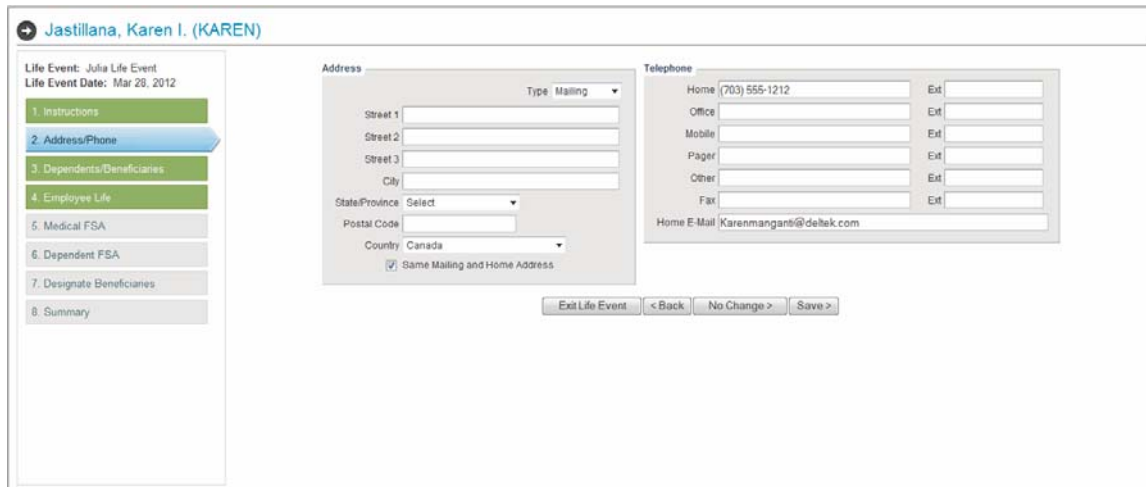
Employees use this page to input a new life event. The *Type* and *Event* fields display drop-down lists from which users can first select either a "Personal" or "Work" *Type*, and then a specific *Event* relating to the selected *Type*. A "Personal" *Event* is a non work-related action, such as a "Move" or "Birth of Child." A "Work" *Event* is a company-requested action, such as a "New Hire" or "Transfer." After the employee enters a selection, check to confirm whether the selected Life Event process is set up in the ESS Life Event Setup screen as needing Pre-Approval.

## Instructions



Use this page to explain the "how to" for each Life Event process. You can enter the instructions in the Configure ESS Life Events screen in Costpoint.

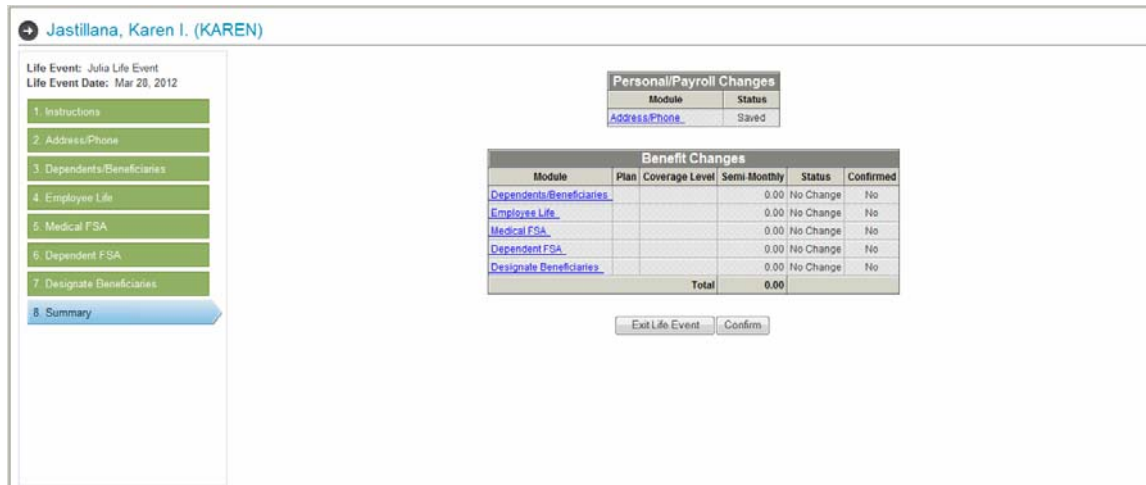
## Module



The Module pages appear between the Instructions and Summary pages. For the selected Life Event process, employees must navigate and potentially update one or more Module pages. Once they click either **No Change**, **Come Back Later**, or **Save** for each page, they are forwarded to the Summary page.

Examples of Module pages are Medical Benefits, Dental Benefits, and Employee Life.

## Summary



This page summarizes the additions/changes that the employee has made. The Summary page can be called up in three different situations:

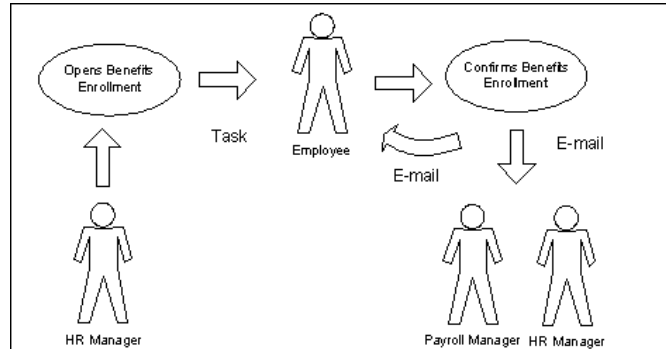
- During normal navigation through the Life Event flow.
- The user returns to a Life Event process without confirming choices and has clicked one of the following for each Module page: **No Change**, **Come Back Later**, or **Save**.
- Having recently confirmed a Life Events process, the user launches the Summary page to view the results of the Life Event process.

## Workflow

With Deltek Self Service Workflow, you can define rules to control:

- Notifying employees and managers of tasks they need to perform or have performed.
- When notifications are sent to employees
- Which functional roles are notified.

Deltek Time & Expense with Employee Self Service uses these settings, along with organizational data contained within the employee groups, to determine how and when information flows from person to person. Electronic inboxes replace physical ones. The following list offers explanations of the terminology used throughout this section:

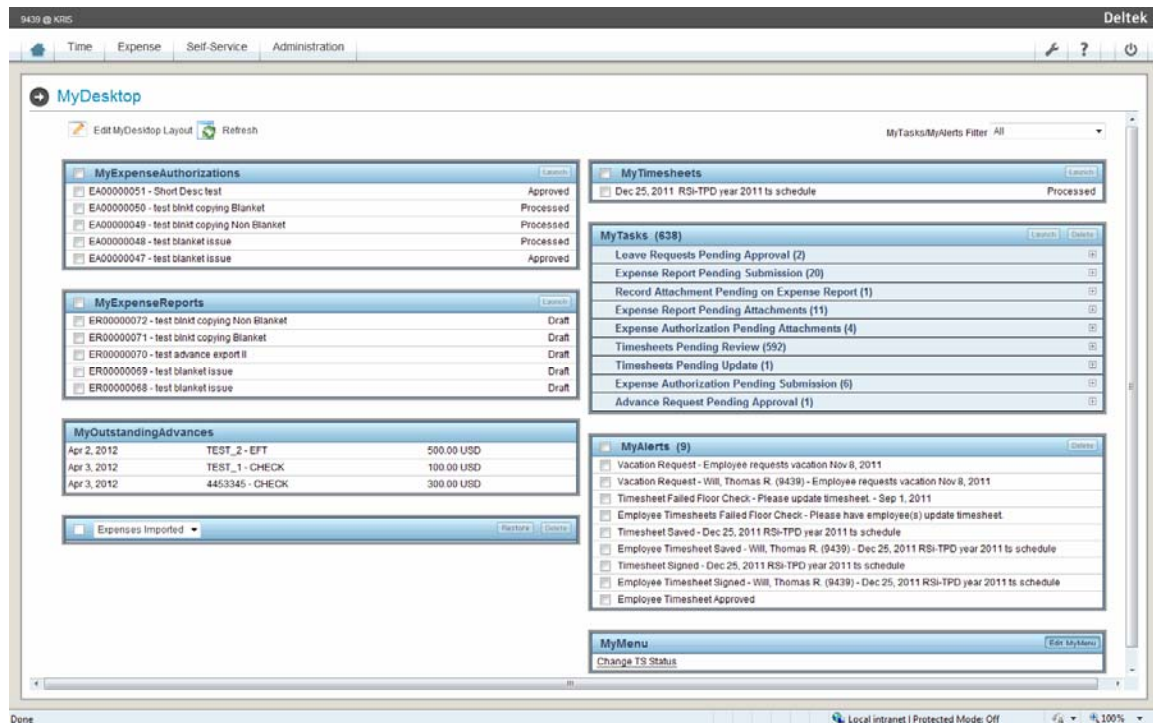


- **Event** — Events initiate workflows. In the diagram above, employees confirming their Benefits Enrollment process is the event. The events in Deltek Self Service are:
  - **Employee Requested Life Event** — This occurs when an employee initiates a Life Event process that requires pre-approval (as determined by your Costpoint settings). Deltek Time & Expense with Employee Self Service notifies certain functional roles that the event requires approval. You can configure functional roles and notification rules specifically for each Life Event process.
  - **Employee Started Life Event** — This occurs when an employee initiates a Life Event process. Deltek Time & Expense with Employee Self Service creates a task for the person, which is to finish that Life Event process.
  - **Employee Confirmed Life Event** — When an employee confirms the Life Event process, there are several notifications that can occur, as determined by designated settings. First, emails may be sent to employees detailing their chosen elections. Emails may also be sent to certain functional roles to notify them of the confirmation, or because an option in the employee's Life Event selections requires approval. Again, you can configure functional roles and notification rules specifically for each Life Event process.
  - **Employee Confirmed Benefits Enrollment** — When an employee confirms his Benefits Enrollment process, there are several notifications that can occur, as determined by designated settings. First, emails may be sent to employees detailing their chosen elections. Emails may also be sent to certain functional roles to notify them of the confirmation, or because an option in the employee's Benefit Enrollment selections requires approval.
  - **Life Event Started or Pre-Approved in Costpoint** — Changes made to the Life Events process in Costpoint can automatically update the Self Service Workflow. (See Utilities\Self Service Sync screen). When Deltek Time & Expense with Employee Self Service registers such changes, it can create desktop tasks for employees to complete the Life Event process.

- Benefits Enrollment Opened or Changed — Changes to the Benefits Enrollment process may generate desktop tasks for employees to complete their processes. Again, this event is triggered by changes in Costpoint discovered by the Self Service Sync utility.
- Task — A task is a duty a designated stakeholder must fulfill after an event has occurred. In the diagram above, a task is created for the employee when the HR Manager opens the Benefits Enrollment screen.
- Notification — Notifications are messages transmitted as email or system alerts. If the employee confirms the Benefits Enrollment process, both the Payroll Manager and HR manager receive notification. Whether the administrator receives an email or an alert depends on individual preference.

## MyDeskTop

Use MyDesktop to perform tasks, view alerts, and navigate quickly within Deltek Time & Expense with Employee Self Service.



The sections of the desktop are:

- **MyTasks** — This inbox displays the current workflow tasks that you need to perform. It is grouped by task. Select which ones you want to perform and then click Launch to display them. For example, let's say you have three expense reports awaiting approval. Select all three expense reports and then click Launch. The expense report application will open with the three expense reports selected.
- **MyAlerts** — Use this alert inbox to read and delete alerts.
- **MyExpense Reports** — This section lists your expense reports and their status. In the Preferences screen, you can determine how many expense reports appear. MyExpense Reports are non-editable if you are licensed only for Deltek Expense.
- **MyTimesheets** — This section lists your timesheets and their status. In the Preferences screen, you can determine how many timesheets appear. MyTimesheets are non-editable if you are licensed only for Deltek Time.
- **MyExpenseAuthorizations** — This section lists your expense authorizations and their status. In the Preferences screen, you can determine how many expense authorizations appear. MyExpenseAuthorizations will only appear if:
  - The user is licensed for Deltek Expense, and
  - Deltek Time & Expense with Employee Self Service is licensed for Add-on and Expense Authorizations.
- **MyMenu** — This menu is fully customizable.



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MyDesktop

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- **MyOutstandingExpenses** — This section lists your outstanding expenses. As you claim the expenses in the Expense Report screen, they are deleted here. You can delete personal expenses here (but NOT company-paid expenses). Your system administrator can restore deleted expenses.
  - **MyOutstandingAdvances** — This section lists your outstanding advances. As you claim the advances in the Expense Report screen, they are deleted here.
- 



In the Preferences screen, you decide whether the splash, Desktop, Timesheet, Expense Report, or Expense Authorization screen displays after you log on.

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# 3

## Implementation

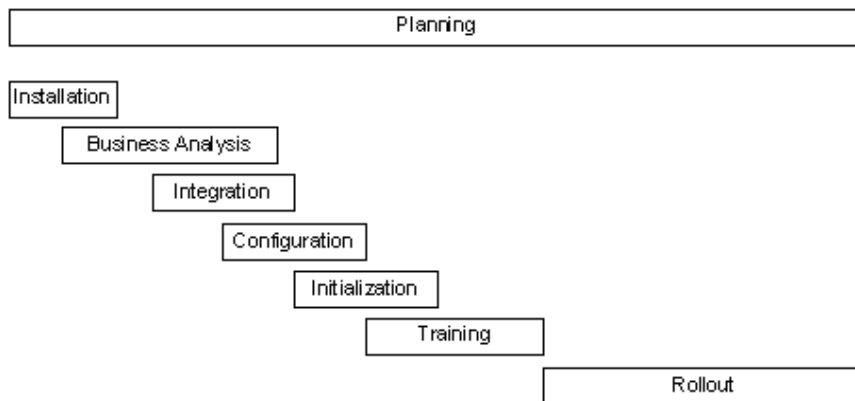
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## Overview

As a rule, implementation of Deltek Self Service affects all employees, as each one will regularly use the program to fulfill a variety of tasks:

- Launching Company Links
- Searching for Employees in Employee Directory
- Performing Various Life Events
- Reviewing/Updating Personal Data
- Reviewing/Updating Payroll Data
- Performing Benefits Enrollment
- Reviewing Benefits

Because of this visibility and scope, seamless implementation, correctly managed and on-schedule, is crucial to minimize disruption to your organization. As a general framework, we have identified the following implementation phases:



Although these phases are shown in the order in which they usually occur, portions of each phase reoccur throughout the implementation project. The length of time spent on each can vary. The remainder of this section provides suggestions for tackling each phase.

## Planning

### Organizational Factors

The efficiency and ultimate success of your Deltek Self Service implementation depends on a number of organizational factors, such as whether your firm:

- Operates in single or multiple locations
- Has system administrators who already have knowledge of the day-in and day-out operations of ESS
- Already has a Deltek Time or Deltek Expense installation
- Employs a large portion of part-time employees who will require more intensive training
- Has employees who frequently change their work location

These considerations can all affect the path to a smooth rollout.

### Organize Your Implementation Team

During this initial phase, assembling your implementation team is essential. We recommend that among its members this team includes:

- Payroll and Human Resources staff who clearly understand your organizational policies and procedures. They should understand how Costpoint's Benefits and Payroll modules work.
- Management staff who can clarify goals and requirements while providing management perspective.
- IT staff who are familiar with your network as well as the hardware used within your organization.

After you have identified your implementation team, select from this group the individual who will serve as your implementation manager. This person will be involved with the project on a daily basis.



We recommend selecting a Deltek consultant for this vital role. Consultants do not eliminate the need for implementation teams, but with their thorough familiarity with Deltek Self Service, they can help ensure a smooth and efficient implementation.

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### Prepare Background Information

Gathering facts about your organization is one of the most important initial steps of the planning phase. If you are using a Deltek consultant, this will assist that individual in developing a comprehensive implementation plan.

First, identify your end users and gather the following information:

- Location — Compile a list of employees by location. This will affect your rollout plans.
- Type (Employee, Supervisor, and so forth) — Identify the types of users. Having a rough count of each type is helpful.
- Language — Determine whether you need to support multiple languages and, if so, how they are distributed within locations. This will affect your rollout plans.

- **Network Access** — Identify the type of access required by the users, such as LAN, WAN, intranet, Internet, Dial-In, and so forth.
- **Hardware** — Establish profiles of your end users' common hardware. Take note of organizational standards, particularly for operating systems and browsers.
- **Desired Live Date** — Determine the target date when you want Deltek Self Service to go live. Work backwards from this date to plan milestones. The Live date, in conjunction with locations, can help determine rollout plans.

## Initial Consultant Kick-Off Meeting

The primary purpose of the implementation team's first meeting is to provide your Deltek consultant an opportunity to become familiar with your organization. The primary goals for this meeting should include:

- Set dates for future consulting visits and lay out goals for those meetings.
- Discuss your organization's current Costpoint payroll and HR setup.
- Prioritize goals for implementation.
- Discuss current benefit plans and options.
- Clarify the concepts.
- Discuss status of hardware/software installation.



All implementation team members should read this [Getting Started Guide](#). In addition, you probably want to discuss concepts before this meeting.

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Your team members should leave this meeting with both a solid understanding of implementation requirements and a plan for the next phase.

## Installation

While the present document does not include a detailed overview of hardware and software installation (please refer to your Installation Guide), this section offers a few notes regarding installation.

Deltek Self Service consists of the following components.

- Database (Database Server)
- Application Logic (Application Server)
- Graphic User Interface (Web Server)
- Reports (Report Server)

These four components can run either on a single computer or on multiple computers. Depending on organizational size, more than one application and/or Web server may be required. Each server type or workstation has its own particular software requirements:

- Supported RDBS — For the Database Server
- BEA Weblogic® and Deltek Time & Expense with Employee Self Service software — For the Application Server
- Web Server software and Deltek Time & Expense with Employee Self Service software — For the Web Server
- Supported OS and Web browser and Adobe® Acrobat® reader for report viewing and printing — For the Workstation

## Business Analysis

During this phase your implementation team surveys current company processes with regard to obtaining, recording, and maintaining employee information, including:

- New hires
- Life events
- Company directory
- Leave balances
- Employee education and training
- Direct deposit
- Paycheck distribution
- Tax information
- Benefits
- Open enrollment
- 401(k) management.

The group refines implementation goals and determines how Deltek Self Service should be configured and used. It is during this phase that your Deltek consultant can provide the most valuable assistance.

## Integration

Integration involves interfacing Deltek Self Service with Deltek Costpoint. See the Costpoint Integration section earlier in this guide for further information.



## Costpoint Configuration

Use this phase to configure Deltek Self Service to support your particular business requirements. For the most part, this means setting up certain screens in Costpoint and Deltek Self Service.

This section features a step-by-step checklist. For details about any specific application, consult the online Help for the appropriate screen.



For existing ESS clients, the Costpoint portion of the Configuration phase does not need to be performed.

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### **□ Step 1 — Configure ESS Global Settings (Costpoint: People/Employee/Employee Interfaces/Employee Self Service/Configure ESS Global Settings)**

- Settings — Enable ESS Logins — This option does not apply to Deltek Self Service 7.1 or greater.
- PIN Options — Does not apply to Version 7.1.
- Employee Directory Settings — Accept defaults.

### **□ Step 2 — Manage ESS Company Settings (Costpoint: People/Employee/Employee Interfaces/Employee Self Service/Manage ESS Company Settings)**

- Taxable Entity — Each company needs to configure a record in this screen so that you can have different settings for each taxable entity.
- Default Class of Service — Security Roles replaces Class of Service for Version 7.1 or greater.

### **Payroll Settings**

- Months of Pay History — How many months of paycheck history would you like Deltek Self Service to display for employees?
- Minimum W-2 Year — How many years of W-2 history should be available for employee viewing?
- Maximum W-2 Year — Through what year would you like your employees to see this data? Use this feature to limit viewing during the period when W-2s are being prepared and to allow viewing when they are ready each year.
- Maximum Number of Direct Deposit Accounts — Choose the maximum number of direct deposit accounts your employees can enter and maintain in the Direct Deposit menu of Deltek Time & Expense with Employee Self Service.
- Allow Withholding State Changes — Companies usually give their employees the flexibility to change their state filing status and exemptions. Select this check box to allow employees to make changes to their withholding state.

## Paystub Inclusion Options

- Regular Paystubs, Bonus Paystubs, and Paystubs with Severance Pay Type: For each of these, you can pick from these options:
  - Show All — The employee can view all regular/bonus/severance paystubs where selected in Deltek Self Service.
  - Exclude all — The employee cannot view any paystubs of this type.
  - Exclude paystubs with future date — Once payroll is posted, employees can view their paychecks in Deltek Self Service. If payroll is posted before the paycheck date, this option ensures that the check does not display before the pay date.
  - Exclude current and future paystubs — The employee will not be able to view posted paychecks dated to the current day, or a future date.
  - Severance Pay Types — Because payroll posting makes the paycheck available for viewing in Deltek Self Service, create a list of pay types used for severance checks and select the "Exclude current and future paystubs" option in the Paystubs with Severance Pay Type drop-down box.

## Benefits Settings — FSA Year

- Current FSA Year — Enter the current FSA year.
- New FSA Year — Enter the next FSA year.

## Open Enrollment Plan Year

Your entries in the *Plan Year Start Date* and *Plan Year End Date* fields should span applicable pay period dates. When you run the Activate Pending ESS Benefit Elections screen after open enrollment, these dates are assigned in the Manage Employee Benefit Elections screen for the new elections. (See Appendix D in this guide for more on benefits enrollment processing.)

## Open Enrollment Period

- Start Date and End Date — Enter the dates that cover your open enrollment period. For example, if open enrollment is November, enter 11/01 in the *Start Date* field and 11/30 in the *End Date* field.

## Current Plan Year

- Plan Year End Date — Enter the end date of your plan year in this field. This end date applies when you run the Activate Pending ESS Benefit Elections screen for the Life Events process. The end date should synchronize with a pay period end date. (See Appendix D in this guide for more on benefits enrollment processing.)
- Check date for final pay period of current FSA year falls within current FSA year — This check box is for determining how many pay periods are remaining. Select this check box if your pay period year corresponds to your FSA year. For example, let's say your pay period year is 12/16 through 12/15 and your FSA year is set up with the same dates. If your FSA year is set to the calendar year in this example, you would not want to select this check box.

## Address/Telephone Module Settings

- Prompt Vendor Address Update — Select this check box if you want Deltek Self Service to prompt employees to update their vendor addresses when they save their employee

addresses. Note that this validation will only occur if the employee ID has been tied to a vendor record.

- **Life Event for Postal Code/State Change** — Enter a value in this field only if you plan on defaulting benefit plans by postal code or by state. If you are defaulting by zip code or state, the Life Event entered here should be "Moving." When employees change a state or postal code in the Deltek Employee Self Service Address/Phone page, Deltek Self Service will launch them to the "Move" Life Event you enter here. The Life Event must have a record in the Life Event Setup screen (see Appendix for Life Event Processing) before this will work. (See Appendix B in this guide for more on life event processing.)

## Other Module Settings

- **Months of Expense History** — As with paycheck history, you can display the expense check history here. How many months of expense history would you like the employee to view?

## □ Step 3 — Configure Deferred Compensation Settings Subtask (Costpoint: People/Employee/Employee Interfaces/Employee Self Service/Manage ESS Company Settings/Deferred Compensation Settings)

### Deferred Compensation Settings

- **Immediate Update of Deferred Compensation Deductions** — If you select this check box, any changes employees make in the Retirement Benefits screen in Deltek Self Service will automatically update Costpoint's Manage Deductions screen in Payroll. You will not need to use the Activate ESS Retirement Benefit Changes screen.
- **Employee Can Change Deduction Method** — Some companies allow employees to have either a fixed retirement benefit amount or a percentage of gross/regular pay. If your company permits the employee to elect either fixed or percentage and you would like to allow the employee to change this method in Deltek Employee Self Service, select this check box.
- **Minimum Percent** — Enter the minimum percentage amount your company will allow the employee to elect.
- **Maximum Percent** — Enter the maximum percentage the employee can elect.



Regardless of the percentage entered, Costpoint will still enforce the annual deferral limit you have entered in the *Limit* field of the Manage Employee Deductions screen.

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## Open Change Periods

Many companies allow their employees to change their retirement benefit deferral amount at any time throughout the year. If this is the case, the start date will be 01/01 and the end date 12/31. However, if employees can change only during certain times, there are two things to consider (using a quarterly example):

- If you allow employees to make changes at any time, you can still leave the setting at 01/01–12/31, but you will need to run the Activate ESS Retirement Benefit Changes utility quarterly.

- If you want employees to make changes during a specified timeframe each quarter, set the dates accordingly. For instance, if you allow them to make changes one month before the end of the quarter, the setup will be 03/01–03/31, 06/01–06/30, and so on. Again, you would still need to run the Activate ESS Retirement Benefit Changes utility.

Once employees make their elections in Deltek Employee Self Service, their data will reside in the Manage ESS Retirement Benefit Elections screen (see Appendix on Miscellaneous Costpoint Screens) until you run the Activate ESS Retirement Benefit Changes utility, at which time it will load to the Manage Employee Deductions screen. (See Appendix A in this guide for more information.)

## Deductions/Methods

Employees already participating in the Retirement plan can make changes to their deferral amount in Deltek Employee Self Service. However, you may want eligible employees who are not yet participating to have the flexibility to enroll in Employee Self Service. To permit this, list the deduction code(s) and applicable method(s) in this section.

Listing the deduction codes and applicable methods also gives participating employees the flexibility to change the method. For instance, if your 401k plan allows both fixed amount and percentage deferrals, you will probably want to allow the employee to select this as well. Remember that you must also select the *Employee Can Change Deduction Method* check box.

## ❑ Step 4 — Manage ESS Company Links (Costpoint: People/Employee/Employee Interfaces/Employee Self Service/Manage ESS Company Links)

Use this screen to set up a page in Deltek Employee Self Service that contains custom links for your company. You can group the links into logical headings (HR links, for example) and set them to display in the order you wish. These links appear in the Company/Links screen in Employee Self Service.

## ❑ Step 5 — Configure ESS State Tax Settings (Costpoint: People/Employee/Employee Interfaces/Employee Self Service/Configure ESS State Tax Settings)

- State — If you allow employees to change their State filing status and exemptions, credits, and/or dependents, you must complete a record for each State in this screen.
- Non-Withholding State — For those states that do not have income tax, select this check box.
- Additional Amount Allowed — For those states that allow an additional withholding amount to be withheld, select this check box.

## Equal to Federal

- Exemptions/Filing Status — Some states require that the state exemptions and/or filing status match what is selected for Federal. In such cases, be sure to select the *Exemptions* and/or *Filing Status* check boxes.

## Filing Status Table

The Manage Employee Taxes screen in Costpoint Payroll requires specific filing status selections for each state. To promote ease of use for employees making their state tax selections, Deltek Self Service requires that they map the filing status to a more logical description. For example, if the Filing Status is B for Both (this is what Costpoint requires regardless of "Single" or "Married" in Virginia), you can map it to a more logical description, such as "Married" or "Single."

In addition, while some states have exemptions, others have dependents or credits. Use the Costpoint Payroll Tax Table documentation to assist you with these issues. If you set both the minimum and maximum to zero, the field will not display for that state in Employee Self Service. For example, if the *Min No. of Exemptions* field is set to 0 and the *Max No. of Exemptions* field is set to 10, these will display and allow the employee to select anywhere from 0-10 exemptions.



If the remaining fields for dependents and credits are set to 0, they will not show as options for Virginia.

To ease the enrollment process for new hires, check one of the filing statuses you set up as the default for each state.



**Remember:** If you want to allow the employee to change withholding states, be sure to select the *Allow Withholding State Changes* check box in the Manage ESS Company Settings screen.

Since your company's payroll manager is probably familiar with the unique setup that Costpoint requires for state taxes, we recommend that you work with Payroll to complete this screen.

## □ Step 6 — Manage Benefit Plans (Costpoint: People/Benefits/Benefit Entry and Creation/Manage Benefit Plans)

- **System Benefit Type** — Use this drop-down box to determine which Benefits module page displays on the Deltek Employee Self Service screen. Choose from Medical Benefits, Dental Benefits, Vision Benefits, Employee Life, Supplemental Life, and others.
- **Plan Information URL http://** — Enter the Web address for either the provider or your intranet so that the employee can easily access the site from Employee Self Service. For instance, the URL could be a direct link to the preferred provider directory from which employees select their physicians.
- **Rehires Eligible on Rehire Date** — Select this check box on the Eligibility Rules tab if a rehired employee's benefit start date also serves as the rehire date. This field determines, in the Life Events/New Hires screen, when the employee's benefits will start.
- **Valid Postal Codes** — This subtask is available if you have selected Postal Code as your Home Address option on the Eligibility Rules tab. Use the table to specify the postal codes or postal code ranges for which this benefit plan is applicable.
- **Valid States** — If you have selected State/Province as your Home Address option on the Eligibility Rules tab, use this subtask to list the states for which this benefit plan is applicable.
- **Requires Approval** — Supplemental life plans often have a guaranteed issue amount beyond which approval is required. If you select this check box on the Enrollment/Coverage Rules tab, the employee's election will go into the Approve ESS

Benefit Elections by Plan screen, and you will be required to approve the election before it displays in the Manage Employee Benefit Elections screen.

- **Require PCP Name and Number** — If the benefit plan requires the selection of a primary care physician, select this check box on the Enrollment/Coverage Rules tab to require that the employee complete this field in Deltek Employee Self Service. The name of the primary care physician will be required in the Manage Employee Benefit Elections screen.



If the employee's spouse has Supplemental Life or AD&D and the premium is based on the age of the spouse, the "DEP CVG" option must be entered in the Manage Benefit Plans screen.

---

### **□ Step 7 — Manage Benefit Plans/Coverage Detail subtask (Costpoint: People/Benefits/Benefit Entry and Creation/Manage Benefit Plans/Coverage Detail)**

- **Copayments/Deductibles** — If you complete this information for a health plan, it displays in Employee Self Service. The employee will be able to view co-payments and deductibles for this plan.
- **Age Based On** — This is necessary for supplemental life insurance for spouses, where the rate can be determined by either the age of the spouse or the employee.

### **□ Step 8 — Manage Benefit Plans/Coverage Options subtask (Costpoint: People/Benefits/Benefit Entry and Creation/Manage Benefit Plans/Coverage Options)**

- **Coverage Option** — The description of the Coverage Option displays alphabetically in Employee Self Service.
- **Dependents Required** — If this coverage option requires dependents (for example, a family option), select this checkbox; otherwise, do not select this checkbox.



Unless you want to force employees to enroll in a plan, you must enter "NO CVG" for the Coverage Option, or perhaps have a waived plan.

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### **□ Step 9 — Manage Benefit Packages (Costpoint: People/Benefits/Benefit Entry and Creation/Manage Benefit Packages)**

The packages you create and assign to employees in the Manage Employee Benefit Elections screen display options available to the employee during the Open Enrollment and Life Events/New Hire processes. For example, if you set up a package with a *Benefit Package Code* of "EVERYTHING," the package's benefit plans and options will be available to all employees assigned to "EVERYTHING" in the *Benefit Package* field in the Manage Employee Benefit Elections screen.



## **□ Step 10 — Manage Benefit Package Defaults (Costpoint: People/Benefits/Benefit Entry and Creation/Manage Benefit Package Defaults)**

Use this screen to default a benefit package, so you will not need to manually assign one to the employee in the Manage Employee Benefit Elections screen before the employee can elect or change benefits in Employee Self Service.

Even if you have only one benefit package, it is a good idea to enter it here so that the Employee Life Events process can find the correct default for the employee, eliminating the need to manually assign one to the employee in the *Benefit Package* field of the Manage Employee Benefit Elections screen. Otherwise, employees will not be able to use the Life Events/New Hires process or the Benefits Enrollment process.

- **Taxable Entity** — Enter a record for each company.
- **Benefit Package Description** - Name the benefit package. Packages are used to restrict the insurance items available to each employee (see previous step).
- **Priority** — Since the Manage Benefit Package Defaults screen allows defaulting by any combination of the Labor Group, Employee Class, Labor Location, Hourly/Salary status or Employment Type fields, it is possible for an employee to meet the criteria for more than one package. If this occurs, Deltek Self Service must recognize which one should take precedence. Use the Priority field to set the preferred order. For example, an employee in the MVA location may meet the criteria for a package called "VA" and a package called "VAPT." If the Priority for VAPT with the MVA location is "1" and the VA with the MVA location is "5," Costpoint will assign VAPT to the employee.

## **□ Step 11 — Configure Payroll Settings (Costpoint: People/Payroll/Payroll Controls/Configure Payroll Settings)**

Providing you enable it here, Deltek Employee Self Service updates audit tracking tables in Costpoint.

## **□ Step 12 — Configure Direct Deposit Settings (Costpoint: People/Payroll/Payroll Controls/Configure Direct Deposit Settings)**

**Print only last 4 digits of Bank Account Number** — In the Posting/Advice Information tab of the Direct Deposit Setup screen, select this check box to suppress the bank account information on both the printed payment advices and in the Deltek Employee Self Service Payroll Checks screen.

## **□ Step 13 — Update Employee Telephone Types (Costpoint: People/Employee/Employee Utilities/Update Employee Telephone Types)**

Previous versions of Costpoint did not enforce specific labels for telephone numbers in the Manage Employee Information screen. For home phone numbers, for instance, one could enter 'H,' 'HM,' and other designations. Use this utility to map both of these labels to the "Home" option in the *New Telephone Type* field.

If your company used Costpoint Version 4.0 or earlier, you must run this utility before using Deltek Employee Self Service.

---



If you click **Show Non-Standard** and Deltek Self Service reports that all telephone types are standard, you do not need to run this utility.

---



## Deltek Employee Self-Service Configuration

Perform the following configuration steps in Deltek Employee Self Service. For details about any specific application, consult the online Help.



You may not need to take all of these steps if you are an existing Deltek Time or Deltek Expense user.

---

### □ Step 1 — Log into System

To log in to a new version of Deltek Self Service, with organizational and employee data yet to be inputted, enter the following:

- Login ID: "INSTALL"
- Password: "password"
- Domain: The name assigned during installation.

As you log in, you will be required to change the password. Your new password must be at least eight characters and include at least one number and at least one special character.



Please make a note of your new password, as Deltek Self Service does not maintain it.

---



If your company currently runs Deltek Time or Deltek Expense, use a login with system-wide access.

---

### □ Step 2 — General Configuration (Administration/Product Configuration)



You can skip this step if you are currently running Deltek Time or Deltek Expense.

---

In this step, you configure global settings used by Deltek Self Service. Please exercise extreme care in configuring this screen, as it may not be possible to change some of the settings afterward. The settings you should be configuring at this point are:

#### Password Settings

The password settings apply if you are not using LDAP authentication.

- Minimum Length — Select the minimum password length. The valid range is 1 to 20.
- Life — Select the number of days a new password can be used. The valid options are 0, 30, 60, 90, 180, and 360. If you choose 0, passwords will never expire.

- **Recycle** — Select the number of days that must expire before a password can be reused. The valid options are 0, 30, 60, 90, 180, and 360. If you choose 0, passwords can never be reused.
- **Login Attempts** — Select the number of login attempts that must be made before Deltek Self Service disables the login account. The valid values are 3, 4, and 5.
- **Must Contain At Least One/Number** — Select this check box if the password must include at least one number.
- **Must Contain At Least One/Special Character** — Select this check box if the password must include at least one special character.
- **Require Mixed Case** — Select this check box if the password must contain a mixture of upper and lower case letters.

## Email Settings

The following settings are configured within the Technical Console on the Domain Details page.

- **System Address** — Enter the system administrator email address. Deltek Self Service uses this as the "SYSTEM" email address for the notification process. It is also used for the Contact Us email hyperlink.
- **SMTP Server Name** — Enter the Simple Mail Transfer Protocol (SMTP) server name. This server sends all email created in Workflow.
- **SMTP User ID** — Enter the user ID you have set up for your SMTP server if the server requires a user ID and password.
- **SMTP Password** — Enter the password you have set up for your SMTP server if the server requires a user ID and password. The password displays an asterisk [ \* ] for each character you enter.

## Server Settings

- **Time Zone** — In the drop-down box, select the time zone where the server resides.

## Row Settings

- **Max Table Rows** — Use the drop-down box to select the maximum number of rows to display in a table window. (If this number is exceeded in the table window, click More to load the remaining rows.)
- **Max Lookup Rows** — Use the drop-down box to select the maximum number of rows to display in a Lookup dialog. (If this number is exceeded in the Lookup dialog, click More to load the remaining rows.)
- **Max Search Rows** — Use the drop-down box to select the maximum number of rows to display in a Search Results screen. (If this number is exceeded in the Search Results screen, click More to load the remaining rows.)

The following settings only apply if you are also configuring Deltek Time or Expense:

- **Export Location**
- **UDT Settings**
- **UDT Linking Settings**
- **UDT Abbreviation Settings**

- User-Defined Field Labels
  - Charge Lookup Options
- 



This screen is already configured for existing Deltek Time or Deltek Expense users.

---

### **□ Step 3 — Log out and log back into system.**

Any time you change settings in the General Configuration screen, you must log out and log back in to ensure the changes take effect

### **□ Step 4 — Self Service Configuration (Self Service/Settings)**

This step involves configuring the majority of the self service settings in Deltek Employee Self Service. The settings you should configure are:

#### **Formatting Options**

- Text Format — Use this option to determine whether Deltek Self Service formats employee-provided alpha text when saved. The valid options are "No Formatting," "Uppercase," and "Proper Case."
- Phone Format — Use this option to determine whether phone numbers must be formatted based on the option selected.
- Postal Format — Use this option to determine whether zip codes must be formatted based on the option selected.

#### **Direct Deposit**

- Allow Update of Current Accounts — Select this check box to allow employees with access to the Direct Deposit screen to update current direct deposit accounts.
- Allow Update of Pending Accounts — Select this check box to allow employees with access to the Direct Deposit screen to update pending direct deposit accounts.

#### **Total Comp/Benefits**

- Show Total Compensation Summary — Select this check box to display the Total Compensation Summary in the Total Comp/Benefits Statement screen in Deltek Employee Self Service.
- Show Benefit Elections — Select this check box to display Benefit Elections in the Total Comp/Benefits Statement screen in Deltek Employee Self Service.

#### **Application Options**

For each Deltek Employee Self Service application (screen), the following items can be configured:

- Display Negative Value Message — Select this check box to display a note in the application indicating that negative values represent cash back to the employee.

- **Forced Logout Minutes** — Use this drop-down box to determine whether the application times out after a proscribed number of minutes of inactivity. (For screens displaying salary data, you may want to constrict the allowed duration of inactivity.)
- **Format Edit** — Use this drop-down box to determine the type of edit that will occur for Phone and Postal formatting. The valid options are "No Edit," "Hard Edit," and "Soft Edit." "Hard Edit" displays an error, whereas "Soft Edit" displays a warning.

## ❑ Step 5 — Log out and log back into system

Any time you change settings in the Self Service Configuration screen, you must log out and log back in to ensure the changes take effect.

## ❑ Step 6 — Security Roles (Administration/Users & Groups)

In this step, you create additional security roles. Examples of security roles are:

- **EMPLBEN** — Employee with Benefits
- **EMPL** — Employee without Benefits
- **HRADMIN** — HR Administrator



If you are an existing Deltek Time or Deltek Expense user, you may need to create new security roles and reassign employees to those roles. This is necessary because the Security Roles screen function restricts access to menu selections. For example, if you have "Employees with Benefits" and "Employees without Benefits," you need at least two security roles, and employees should be assigned the proper role accordingly.

You must also modify your existing security roles to allow access to the appropriate Employee Self Service screens.

---



The Security Roles function replaces the Class of Service function used in Deltek Employee Self Service 3.x.

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## ❑ Step 7 — Functional Roles (Administration/Users & Groups)

In this step, you create additional functional roles, if necessary. Examples of functional roles are as follows:

- **DM** — Division Manager
- **PAY** — Payroll Manager
- **VP** — Vice President
- **HR** — Human Resources



Deltek Self Service comes pre-loaded with the following functional roles:

- SPSVR — Primary Supervisor
- BSPVSR — Backup Supervisor
- PADMIN — Primary Administrator
- BADMIN — Backup Administrator

Please note that you may need to review and adjust the rights and permissions.

---



Functional roles are not necessary until the release of Service Pack 1 (SP1) for version 7.1. SP1 includes Employee Self Service Workflow. With Workflow, you will need to define which functional roles are notified when certain events occur.

---

## □ Step 8 — Add Administrator Login (Administration/Users & Groups/Employee Information)

In this step, you create a "Master" login to replace the "Install" login used during this implementation.

- Add "HRADMIN" employee
    - Provide required field (required fields indicated with Bold).
    - Grant user access to Web Employee Self Service.
    - Assign employee to a security role that has access to the entire system.
  - Save employee.
  - Reset the password to ensure a password is assigned (the default is the value entered in *Government ID* field).
- 



You must remember your login ID and government ID.

---



Existing Deltek Time or Deltek Expense users most likely will not need to create this login, since a master login probably already exists.

---

## □ Step 9 — Logout

If you performed step 8, then log out of Deltek Self Service.

## □ Step 10 — Test Login

If you performed steps 8 and 9, test the login you just created. Here is the login information you are testing:

- Login ID: Use the login ID you created.
-

- Password: Use the assigned government ID.
- Domain: Use the name assigned during installation.

## **□ Step 11 — Delete Install Login (Administration/Users & Groups/Employee Information)**

Delete the "Install" employee.



Deleting the "Install" employee removes a potential security weakness.

---



We recommend that you make a backup of the database at this time.

---

## Initialization

During the initialization phase, you populate the configured system, either manually, or by importing data through the interface. Whether information is inputted manually or imported varies from one implementation to another.

The remaining part of this section is a step-by-step checklist. For details about any specific application, consult the online Help.

### ❑ Step 1 — Configure Import (Administration/Process/Import Console)

Before initializing the tables, configure the import options to:

- Define import source and locations.
- Defer configuring the scheduled import to a later date.



As Costpoint 5.1 currently supports only the ASCII export, you must select the *ASCII* check box. If you are currently a Deltek Time or Deltek Expense client, this screen should already be configured.

---



The import and trash location most likely will be directories on your application server. These directories must be shared because Costpoint writes and accesses files in that directory.

---

### ❑ Step 2 — Configure Interface in Costpoint (Costpoint: People/Labor/Deltek Time and Expense Interface/Export Data to Deltek Time & Expense)

Use this screen in Costpoint to configure and download data to Deltek Time, Deltek Expense, and Deltek Employee Self Service. Employee Self Service only needs employee-related data.

- File Location — The file location should be the import directory identified in Step 1.



If you are currently a Deltek Time or Deltek Expense user, the current extract should work with no changes required. If you are using ONLY Deltek Employee Self Service, you must configure the Employee Information tab and save it as a saved parameter.

---

## Employee

- Basic Employee — Select this check box on the Employee Information tab to download employee master data.
- Employee History — Select this check box on the Employee Information tab to download employee salary/information data. (You do not need to select *Export Labor Rates*.)

## Employee Groups

Use these download options on the Employee Information tab to select which employee groups you want to create using Costpoint data.

- Supervisor Groups — Select this check box to create employee groups based on the *Supervisor* field in Costpoint.
- Manager Groups — Select this check box to create employee groups based on the *Manager* field in Costpoint.
- Home Org Groups — Select this check box to create employee groups based on the employee home org.
- HR Org Groups — Select this check box to create employee groups based on the employee HR org.
- Company Groups — This check box is selected by default when Costpoint is configured for multicompny. It will create an employee group for each Costpoint company defined.

### Government ID Options

Use this group box to determine which value is shared with Deltek Employee Self Service for each employee's government ID. Since the government ID is used as a default password in Employee Self Service, this option controls which default is used for an employee's password. (This assumes Deltek Self Service is NOT using LDAP authentication.)

- Download SSN — Select this option to populate the *Government ID* field with social security numbers.
- Download Date of Birth — Select this option to populate the *Government ID* field with dates of birth.

## ❑ Step 3 — Execute Data Export in Costpoint (Costpoint: People/Labor/Deltek Time and Expense Interface/Export Data to Deltek Time & Expense)

Once you have saved the setting for the interface, execute the export.



If you are an existing Deltek Time or Expense user, there is no need to perform this step since Deltek Employee Self Service should already have employee data.

## ❑ Step 4 — Initial Import (Administration/Process/Import Console)

Under **Import on Demand**, click **Execute** to import employees. Review and correct any errors found in the log and, if appropriate, adjust the interface or configuration.

## ❑ Step 5 — Scheduled Import (Administration/Process/Import Console)

Set up scheduled import options as needed.

### Scheduled Import

- Interval — Select the number of hours and minutes between imports.
- Start Time — Select the time of reference upon which the interval will be based.



- Start — Click this button to start the import process.

## ❑ Step 6 — Employee Groups (Administration/Users & Groups)

- If employee groups were imported:
  - Add additional groups as needed.
  - Add additional supervisors/administrators as needed.
- If employee groups were not imported:
  - Add groups as needed.
    - Members
    - Owners
    - Charge Trees

## ❑ Step 7 — Grant Employee Access (Administration/Users & Groups/Employee Information)

To give an employee access to Deltek Self Service, you must set the employee's security role and assign the employee a password and a license.



You can grant access to Deltek Self Service through the Password Utility; however, you must assign security roles in the Defaults tab in Employee Information.

---

### Basic Information tab

- Web Self Service Access — Change the option in this drop-down box from "No Access" to "Seat" for each employee that needs access to Deltek Employee Self Service.

### Defaults tab

- Security Role — Use this drop-down box to assign an employee to a specific security role. Otherwise, a default is used which you can change if needed.



If the employee already has a password and a role, you need only to grant that employee access to Deltek Employee Self Service.

## Training

It is vital to maintain training materials and keep them accessible, as new hires will continue to use them long after you roll out Deltek Self Service.

### Manuals

Training materials usually consist of manuals designed for employees, supervisors, and administrators. Though Deltek consultants can help create these manuals, creating and updating them should be part of your company's procedures. The manuals usually contain:

- User interface basics
- Documentation for the applications/screens

Employee manuals normally contain only documentation for the various Employee Self Service applications, including the desktop. Since Deltek Self Service offers no manager Employee Self Service features at present, supervisor manuals are identical to employee manuals.

Administrator manuals often contain procedural checklists, as described below.

### Procedural Checklists

Procedural checklists provide invaluable assistance for administrators. These checklists usually focus upon a schedule or a task. For example, you might create daily and weekly checklists, as well as checklists for new hires and terminations. Examples of such checklists are:

- New Hire Checklist
- Processing Benefits Enrollment Checklist
- Processing Life Event Checklist

### Quick Reference Guide

Quick Reference Guides are pamphlets that provide users with quick help about logging into Deltek Self Service and performing the most common Employee Self Service activities.

### Online Help

When you open the system's online help, the initial topic is screen-specific; it relates directly to the screen you are viewing. That topic may have links you can click to go to other, closely related topics. The full help system is available to you through the links in the navigation pane on the left side of the help window.



The online help is HTML based. You can customize the help to reflect your configuration and policies. See the [Deltek Time & Expense with ESS Technical Guide](#) for further information.

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### Training Classes

We strongly recommend that you conduct formal training classes or orientations. Classes designed to provide in-depth training for employees and supervisors usually run 30 to 60 minutes, while classes for administrators might last two hours.

Training

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Training classes should provide as much hands-on experience as possible. Use the production database or a special training database. See the Deltek Time & Expense with ESS Technical Guide for information on setting up different domains.

---



If possible, schedule your orientation classes to occur just before employees begin using Deltek Self Service. Training should recur throughout the rollout schedule as new hires are introduced to Deltek Self Service.

---

## Rollout

The rollout phase is comprised of several smaller phases. These include:

- Define Pilot Group
- Train Pilot Group
- Pilot Group Test
- Pilot Evaluation
- Train Production Group
- Roll Out Production Group

The rollout starts with the definition, training, and testing of a pilot group. At the end of the pilot, you evaluate the results and make any necessary adjustments to the configuration. Upon the completion of a successful pilot, you can proceed with the rollout to the organization.

### Pilot Recommendations

The pilot test provides you valuable live experience with Deltek Self Service while validating your configuration.

Here are some hints on making your pilot as successful as possible:

- The pilot group should be between 25 and 100 users.
- Users should include a mix of direct and indirect employees.
- Users should have varying access: WAN, LAN, Internet, and so forth.
- The pilot group should be physically located near the implementation team.
- The pilot test should include Life Events and Benefits Enrollment processing.
- You should train your users during the first week of the pilot.

### Rollout Recommendations

During rollout, you deploy Deltek Self Service and go into production. The rollout can be either phased or unphased. We recommend phased rollouts, as the overall implementation of an organizational-wide system can seem an overwhelming process.

- **Timing** — Plan rollouts so that they start or complete on a particular date of HR significance. For example, you will want to finish rollout by the start of open enrollment so that all employees can go through the same Open Enrollment process.
- **Size** — The size of the rollout depends on the training resources and how much training you can accomplish. Rollouts typically range from 100 to 500 employees.
- **Frequency** — The rollout phases should occur as frequently as you can support.




# Appendices

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