

Deltek Time Collection™ 9.0.1

Getting Started Guide

May 31, 2013

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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.

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](#)

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® Time, one of the premier Web-based labor collection systems available today! Deltek Time provides the power and flexibility to support your company, large or small, and whatever financial, payroll, or enterprise resource planning (ERP) system that you use. This Getting Started Guide teaches you important concepts and how to implement and use the system. As you get started with Deltek Time, remember these pointers:

- This Getting Started Guide explains how to initialize and implement the system.
- The online help topics describe the basic functions of the user interface and include detailed documentation about every screen in the system.
- The Deltek Time & Expense with ESS Technical Guide provides a technical overview of the system along with valuable materials about the database, security, integration, and so on.
- Sample data is installed as part of the standard Deltek Time & Expense with ESS installation. The data is there for you to explore and experiment with.
- This Getting Started Guide assumes that Deltek Time is already installed on your company's intranet or internet, and that your computer meets the system requirements for operating system, browser, etc., outlined in the Deltek Time & Expense with ESS Technical Guide.
- Deltek Time is an extremely flexible system. With that said, there may be special restrictions or recommendations on how it can be configured, depending on your financial, payroll, and/or ERP system. If you use Deltek® Costpoint® or GCS Premier™, please review the relevant appendixes on the system interfaces in this guide. If you use non-Deltek solutions, your system consultant can provide a wealth of knowledge and insight on how to configure the system appropriately.
- Deltek Expense and Deltek Employee Self Service are not required for implementing Deltek Time. Deltek Expense and Deltek Employee Self Service have their own Getting Started Guides, and you may notice some overlap among the guides.
- Throughout this guide, we have added special hints for our Deltek Costpoint and GCS Premier users. Whenever you see a Costpoint () or GCS Premier () icon, you will find information that will help you use Deltek Time more effectively with these two products.

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Overview

Before discussing the implementation and initialization of Deltek Time, let's first cover some of the more important concepts:

- Licensing
- User-Defined Tables
- Functional Roles
- Security Roles
- Timesheet Schedules
- Work Schedules
- Leave
- Timesheet Classes
- Employee Groups
- Charge Trees
- Workflow
- MyDesktop

Licensing

Deltek Time & Expense with Employee Self Service supports numerous licensing options.

Modules

Deltek Time is comprised of separate modules that can be licensed separately or together. The following modules are available:

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

All modules are installed during the Deltek Time & Expense with ESS installation. If you have a license for all modules, you can configure the system so that some employees have access to one module and not to the others. Employees can be granted access to one or more licensed modules. These modules share some screens (applications), and an employee who does not have 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
Desktop	Desktop	X	X	X
Preferences	Preferences	X	X	X
Time Entry Module				
Menu	Application	Time	Expense	Self Service
Schedule	Employee Work Schedule	X		
Record Time	Time	X		
	Generate Timesheets	X		
Process	Export Timesheets	X		
	TS Line Approval	X		
Analyze	Charge Activity	X		
	Employee Activity	X		
	Utilization Inquiry	X		
	Billing Backup	X		
	Print Timesheets by Charge	X		
	Interim Timesheet	X		
Audit	Daily Floor Check	X		
	Timesheet Status	X		

Settings	Time Configuration	X		
	Utilizations	X		
	Company Work Schedules	X		
	Timesheet Schedules	X		
	Wage Schedules	X		
	Leave Types	X		
	Timesheet Classes	X		
	Events	X		
Utilities	Mass Correct Timesheets	X		
	Change TS Status	X		
	Clear Timesheets	X		
	Timesheet Transfer	X		
	Rebuild Leave	X		
Expense Module				
Menu	Application	Time	Expense	Self Service
Plan Expenses	Expense Authorization		X ¹	
Record Expenses	Expense Report		X	X
Process	Export ERs/Advances		X	X
	Export Commitments		X	
	Maintain Imported Expenses		X	
	Compute Commitments		X	
Analyze	Outstanding Aging		X	
Audit	Expense Report Status		X	
	Expense Authorization Status		X	
	Commitment Inquiry Report		X	
Settings	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	
Utilities	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	
Self Service Module				
Menu	Application	Time	Expense	Self Service
Employee Information	Employee Personal Info			X
	Address/Phone			X
	Emergency Contacts			X
	Education, Skills & Training			X
	Company Directory			X
	Company Links			X
Payroll & Benefits	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
Process	Self Service Sync			X
Settings	Self Service Configuration			X

Utilities	Self Service Status			X
Administration Module				
Menu	Application	Time	Expense	Self Service
Product Configuration	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
Users & Groups	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
Master Data	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	
Process	Import Console	X	X	X
	Scheduling	X	X	X

¹ Available if your system is licensed for the 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 - This module is free to Web Time customers.



For information on installing and configuring Deltek Mobile Time, see “*Configure Deltek Mobile*” in the Appendix of this guide.

For information on using Deltek Mobile Time, see the Deltek Mobile Time online help, available from your handheld device, or also see the Deltek Mobile Time Quick Reference Cards, which are available from the following locations:

- The software download site, when you download the application
- The Deltek Customer Care Connect site at <http://support.deltek.com>

-
- Expense Authorizations

License Types

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

- Seat — This type of license gives users unlimited transactions (timesheets, for example, and/or expense reports).
- Transactional — This type of license allows a user to share, with other users of the same license type, a pool of 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, nor do they apply to Deltek Mobile Time.

To grant access to the Mobile Time module, select the **Mobile Time** check box in **Personnel » Employee Information**.

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

With Seat licenses, Deltek Time & Expense with Self Service tracks:

- The number of licensed users and whether you have exceeded this number.
- The date on which the license type was assigned and saved in the Employee Information screen.
- The date on which a user of that license type logs in.

If you have a Transactional license, you cannot assign this license type when you exhaust your license pool. In such cases Deltek Time & Expense with Self Service will not allow a user to add a timesheet (Save) or an expense report (Finish on General Wizard).

In cases of exhausted license pools, Deltek Time & Expense with ESS prevents new users from obtaining Transactional licenses or saving timesheets and expense reports.



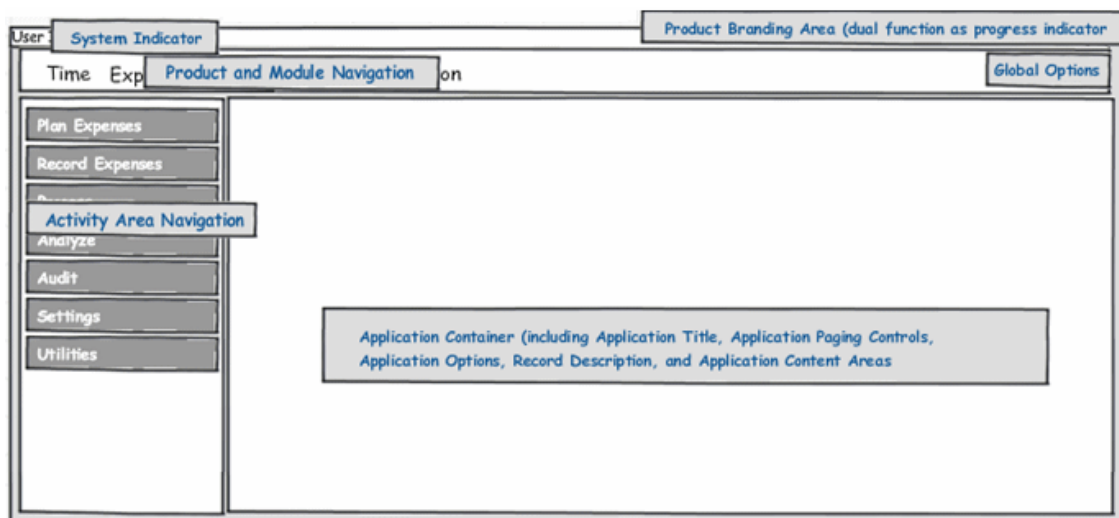
The type of license is based on the employee whose timesheet or expense report is being entered. Thus, when an administrator submits timesheets and expense reports on behalf of a particular employee, Deltek Time & Expense with ESS uses the status of that employee to determine how the license is evaluated.

Though the browser-based user interface for Deltek Time & Expense with ESS 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 getting into the basics of the user interface, it is important to note a few of the display components:

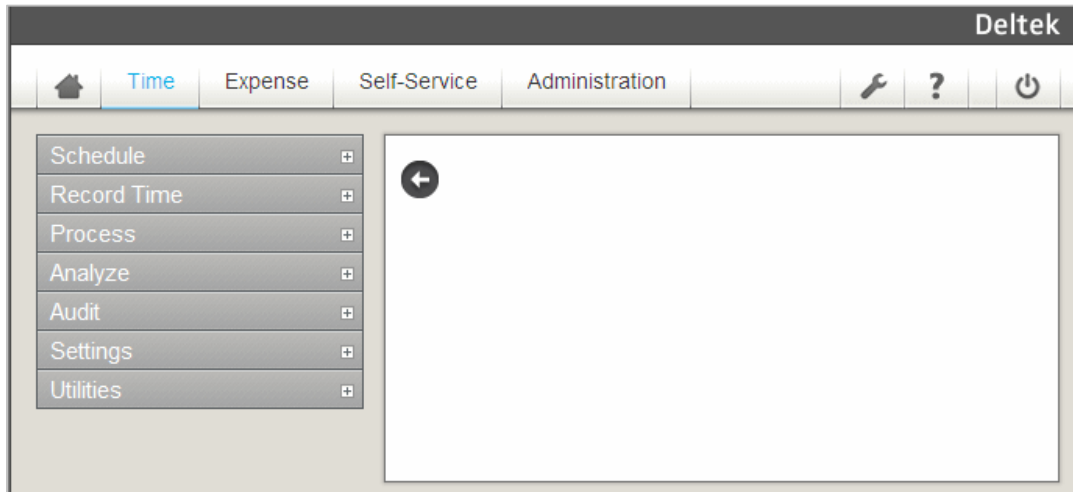
- **Browser** - Deltek Time & Expense with ESS supports several different browsers and operating systems. Accordingly, appearance and behavior for certain screens may vary slightly. Please refer to the Deltek Time & Expense with ESS Technical Guide for further details.
- **Resolution** - Deltek Time & 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, scroll bars display. With higher resolutions additional visual information may display to the lower left. In an optimal setup, the available page size is approximately 960x680 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 ESS 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. Please see "MyDesktop" 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 & Expense – Select this item to display the</p>

Icon	Description
	About Deltek time & Expense with Employee Self Service dialog box. See "About Deltek Time & Expense with Employee Self Service" in this guide for further information.
	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, you either do not have rights to those options 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 ESS and to 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 entire menu structure by module:

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

Utilities	Mass Correct Timesheets Change TS Status Clear Timesheets Timesheet Transfer Rebuild Leave
Expense Module	
Menu	Application
Plan Expenses	Expense Authorization
Record Expenses	Expense Report
Process	Export ERs/Advances Export Commitments Maintain Imported Expenses Compute Commitments
Analyze	Outstanding Aging
Audit	Expense Report Status Expense Authorization Status Commitment Inquiry Report
Settings	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
Utilities	Clear Expense Reports Clear Expense Authorizations Expense Utility Advance Utility

	Payment Utility Per Diem Preprocessor Change ER/Advance Status
Employee Self-Service	
Menu	Application
Employee Information	Employee Personal Info Address/Phone Emergency Contacts Education, Skills & Training Company Directory Company Links
Payroll & Benefits	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
Process	Self Service Sync
Settings	Self Service Configuration
Utilities	Self Service Status
Administration	
Menu	Application
Product Configuration	General Configuration UDT01 Account Types Employee Group Types Custom Text Recurrence Codes
Users & Groups	Employee Information

	Employee Groups Security Roles Functional Roles Password Utility
Master Data	Charge Trees UDT01 UDT02 UDT03 UDT04 UDT05 UDT06 UDT07 UDT08 UDT09 UDT010 UDT011 UDT012 UDT013 UDT014 UDT015
Process	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 running an application, Deltek Time & Expense with ESS displays a centered splash screen image.



You can customize the graphic image. You can also customize the colors of certain areas of the screens and dialog boxes. 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 ESS comprises several applications. Three types of applications normally display in the application area.

- Maintenance application
- Process application
- Timesheet application

Maintenance Application

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

Summary

A maintenance application display commences with 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
- Tabs may or may not be featured

Process Application

The screenshot shows the 'Export Timesheets' application. It features a 'Timesheets' section with a dropdown menu set to 'Approved' and a checkbox for 'Export Work Schedules'. Below this is a table with columns: Timesheet Period, Start Date, End Date, and Timesheet Date. There are also 'Options' and 'Groups' sections. The 'Options' section includes fields for 'Batch ID' and 'Costpoint Company'. The 'Groups' section includes a 'Type' dropdown and a 'Select All' button. At the bottom, there are buttons for 'Process', 'Preview/Print', 'Export', and 'Close'.

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

Summary

A process application may consist of a simple or tabbed form. No Add, Search, or Edit functions are present, because the screen updates a single record and/or performs a process. Process applications have the following characteristics:

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

Timesheet Application

The screenshot shows the 'Timesheet' application. It includes a toolbar with icons for Open, Save, Search, Print, Audit, Leave, Reverse Timesheet, Off-Line Timesheet, and Notes. Below the toolbar, there are fields for 'Employee' (Will, Thomas R. (9439)), 'Status' (Missing), and 'Revision' (1). There is also a 'Class' field (Ovrhd Class(Shop Supervisors)0) and a 'RSI-TPD year 2011 ts schedule Period Ending' field (Apr 15, 2012). The main area is a grid for time collection, with columns for days of the week (Sun 4/1 to Wed 4/11) and rows for projects (UDT02 Project) and time types (Regular, Overtime, Total). A legend at the bottom indicates colors for Holiday (yellow), Leave (green), and Non-Work Day (grey). There are also fields for 'Signature' and 'Approval'.

Summary

The timesheet application has the following characteristics:

- Toolbar and navigation icons
- Spans entire application area
- Spreadsheet-like grid

Application Contents

Summary

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

Background

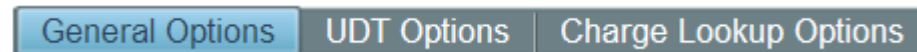
The application background is the space within the application area where the application resides. The background for Maintenance applications starts approximately 50 pixels below the application options area, while Process application backgrounds are centered on the application area. Backgrounds for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



You can customize the background color for the application. See the [Delte 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. The Tabs can be in one of three states, Active, Inactive, and Disabled.



Active

An active tab is the tab whose information is currently displayed. There can be only one active tab in an application.

Inactive

Inactive tabs are tabs whose information is not currently displayed. 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 similar fields are located. A screen might display multiple group boxes.

Field Label

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


Edit Field

Enter values directly into an edit field. 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 with 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 except that you cannot directly enter a 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 the email edit button to the right of that field. To access the mail system, click the email field.

Drop-Down List

Select values from drop-down lists by clicking on 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. Checked (or selected) 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

Select records from multiple selection lists by clicking them. Select multiple records by using Shift Click and Ctrl Click. **Select All** or **Deselect All** buttons are also available.

Column Headings

Although 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. Most tables have row headings to the left of the row. Select a row by clicking the heading. Click it a second time to clear the row. If the table includes a check box to the left of the row, you can select all the rows in the grid by checking this box, or unselect them by unchecking the box.

Grid

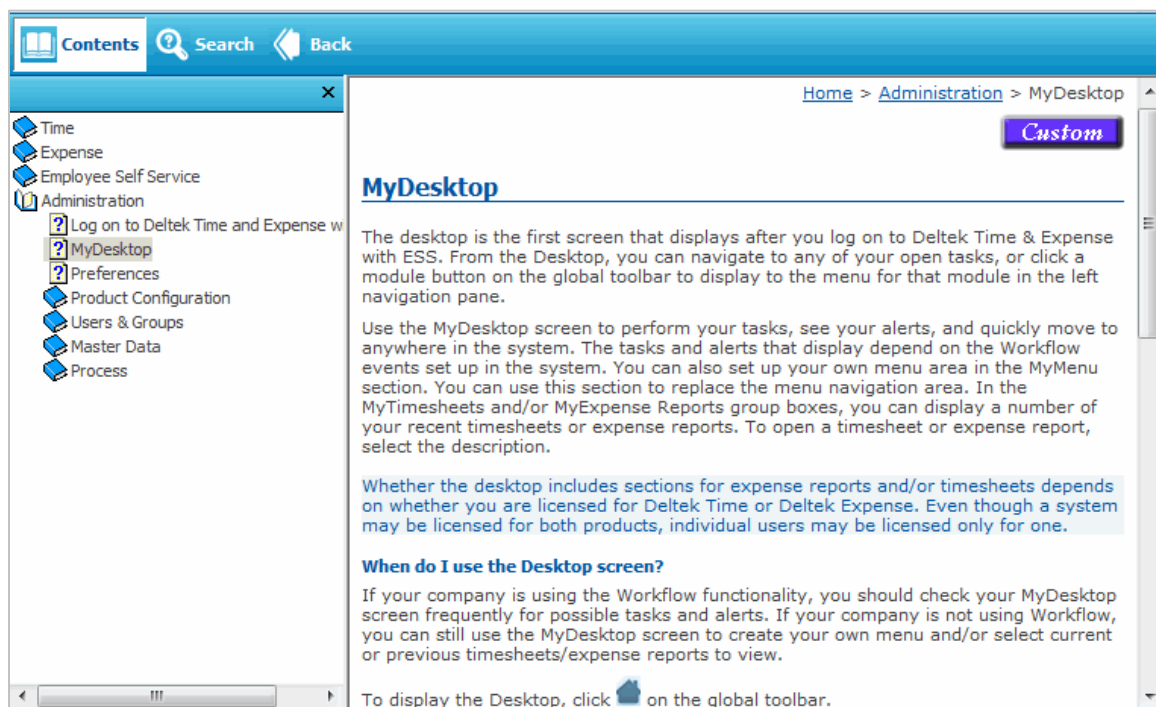
Grid columns may be resizable. Horizontal and vertical scroll bars display as needed.

Dialog Boxes


This section provides information on the following Time & Expense with ESS dialog boxes:

- Help
- Search
- Simple Lookup (non-dates)
- Simple Lookup (dates)
- About Deltek Time & Expense with ESS


Help Dialog Box



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.

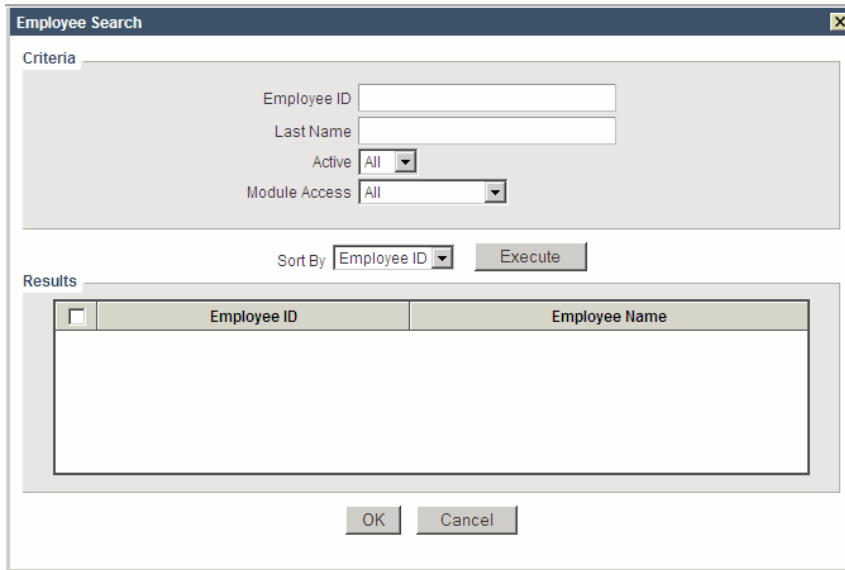
The user-defined table IDs display according to how you have them set up in the UDT Options tab of the General Configuration screen. For example, if you set up UDT01 as "Account," "Account" displays as the UDT label in Help.

The help that appears when you click  and select "Help" 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 previous 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.

Search Dialog Box



Summary

Use the **Search** dialog box to filter search results of either a Simple form or Tabbed form.

For example, from the employee information screen, you could refine a search by searching by last name.

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** – Use this field to conduct a search based on specific text. When you perform a text search, you need enter only a portion of the text (for example, "Sm" instead of Smith) for the search engine to locate all records that begin with that text. If you precede the search text with a percent sign (%), the search engine locates all the records that contain that combination of letters or numbers.

This is an optional field and leaving it blank does not affect other search criteria.

- **Drop-Down** - Certain fields are limited to fixed values. Use drop-down lists (such as *Module Access* in the screen shot above) to pick the desired value. 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. 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.

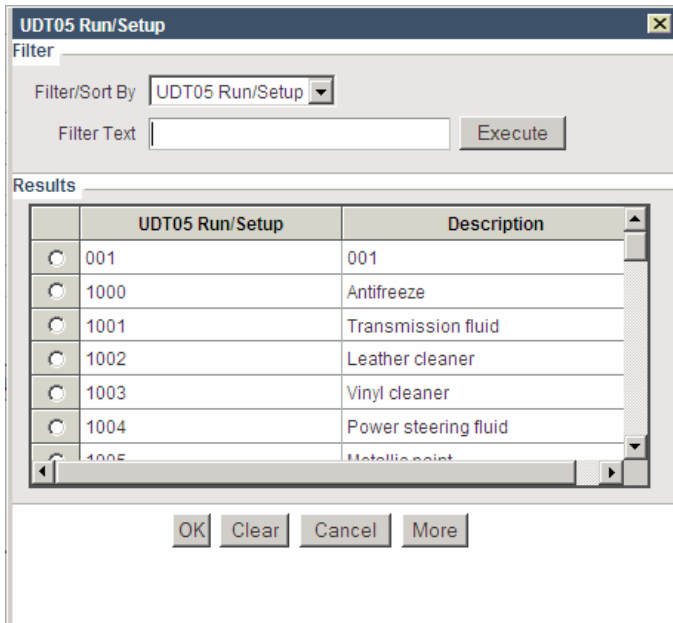
Cancel

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	Metallic paint

Summary

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

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 finds 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 by clicking the button to the left of that row. Then click **OK** to view it in the application where the lookup originated.

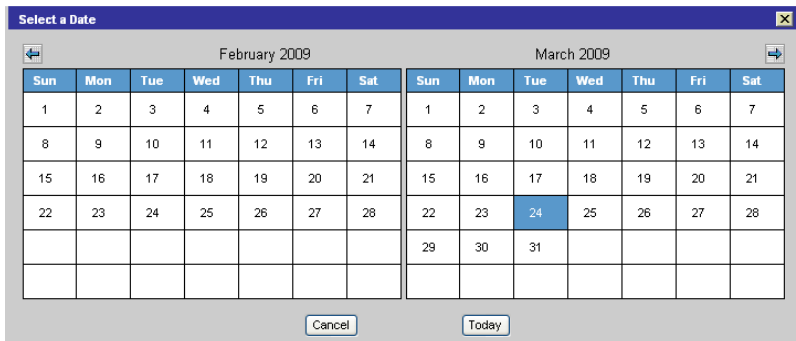
Cancel

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 change the maximum number of rows in the **Max Lookup Rows** field of the **General Options** tab in the **General Configuration** screen.


Simple Lookup (Dates)



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				

Cancel Today

Summary

The Calendar Lookup icon, , 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 advance to the first day of the following month. Click the navigation arrow to the left of the **Month** to return to the first day of the previous month.

Date

Select the date from the calendar.

OK

Click **OK** to accept the selected date.

Cancel

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

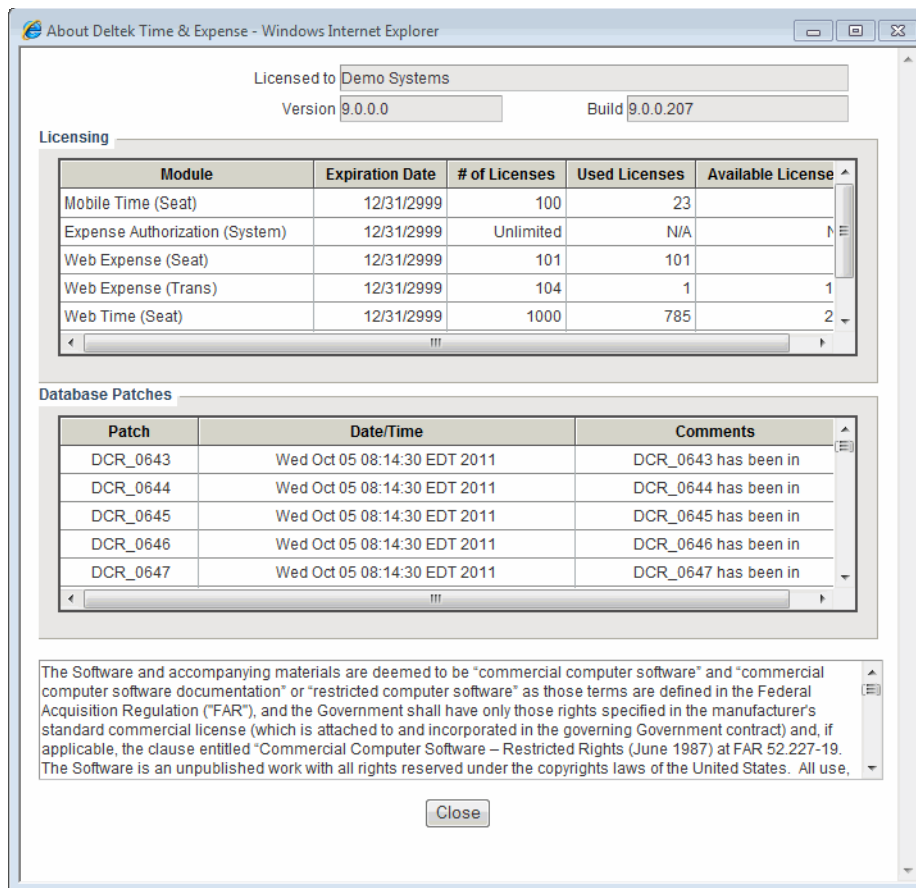
Clear

Click **Clear** to return to your application and clear 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 click  in the global options area. This dialog box displays the version, build number, available licenses, and other related 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 all 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

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

Login Page

This guide assumes that you have already made Deltek Time & Expense with Employee Self Service available 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.

When you open your browser, enter either the URL address for Deltek Time & Expense with ESS or use a link from your corporate Web site to open the login screen.



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: data based and LDAP. 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 outside LDAP service. For further information, please see the Deltek Time & Expense with ESS Technical Guide.

Password

Enter your login ID. Login IDs are assigned to employees within Deltek Time. They can be the same as the employee ID or different. 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.



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.

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, once you successfully log in, the Change Password dialog box displays. You must verify the new password by entering it twice. The password must conform to the password policies as configured in **Password Settings** on the General Options tab of the General Configuration screen.

If you select this check box, Deltek Time displays the Change Password dialog box 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 box only if you are using data-based authentication.



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

Login ID:	install
Password:	password
Domain:	Depends on the name 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 box. If your system uses data-based authentication and you are logging in for the first time, you must change your password. Upon subsequent logins, Deltek Time will direct you 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. It requires them 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:

- 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

- 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
-

User-Defined Tables

Since no two companies structure timesheets the same way, Deltek Time offers flexibility through its numerous configuration options. You can use Deltek Time combined with Deltek Costpoint and Deltek GCS Premier, in addition to most other financial and payroll packages.

The flexibility of Deltek Time is based on 15 User-Defined Tables (UDTs). These UDTs serve as validation tables and are configured during setup to interact with your company's accounting software. Each UDT contains a "Code" and a "Description" along with other attributes. The 15 UDTs aggregate the contents of each timesheet line, against which hours are recorded. UDTs should contain your labor charges and other types of data that you need recorded.

In this guide, User-Defined Tables are numbered "UDT01," "UDT02," "UDT03," and so forth. As part of the initialization, however, let's assume you have defined UDT01 as "Account." Therefore, whenever you see "UDT01" in this documentation, you must translate that to "Account." Please keep this in mind, as the fields referenced in this guide may have different names in your configuration.

UDT01

UDT01 is one of the most important UDTs in Deltek Time. The attributes of UDT01 are as follows:

- Up to 50 positions
- Can be linked to UDT02
- Can be linked to UDT07
- Can be linked to UDT09
- Start/end date
- Can have Functional Role Assignments
- Miscellaneous business rules based on Type
 - Can be used by Time, Expense, or both.
 - Can you charge this UDT in advance?
 - Utilization category
 - Billable/Non-billable
 - Minimum daily regular hours
 - Maximum daily regular hours
 - Do hours charged to this UDT count towards OT (Deltek Time Only)?
 - Do hours charged to this UDT count towards Time In/Out (Deltek Time Only)?
 - Can employees enter work start and stop times for this UDT?
 - Are hours charged to this UDT included in proration calculation (Deltek Time Only)?
- Required to be used
- Active/Inactive
- Date edit (hard/soft/no edit)
- 3 user-defined text fields
- 3 user-defined date fields

- Can be line approved
- Abbreviation

Because of its attributes, you can use UDT01 as a General Ledger Number or as a Project/Job number. Common configurations either use UDT01 as the prime charge number by itself or as a sub number when it is linked with UDT02. When you use UDT01 in conjunction with UDT02, you can configure Deltek Time to always require a UDT02/UDT01 combination or occasionally allow UDT01 by itself.



This field is the "XXXX-XXX" portion of the account/contract number. UDT02 is used for the WBS only if "Data Entry by WBS" is used.



This field is the account number.

UDT02

UDT02 can optionally be the charge number providing you link it to UDT01. In this configuration, the UDT02 can be a primary charge number. The attributes of UDT02 are:

- Up to 50 positions
- Can be linked to UDT01
- Can be linked to UDT07
- Can be linked to UDT09
- Start/end date
- Can have Functional Role Assignments
- Can be used for Time, Expense, or both
- Active/inactive
- Date edit (hard/soft/no edit)
- 3 user-defined text fields
- 3 user-defined date fields
- Can be line approved
- Costpoint Company code
- Abbreviation



You can use this field for a WBS number and link it to UDT01. Only charges that require "Data Entry by WBS" use this field.



This field is the Project ID and is linked to UDT01. Only charges that require projects use this field.

UDT03

UDT03 has the following attributes:

- Up to 20 positions
- Can be linked to UDT09
 - Optionally different description
- Active/inactive



You can use this field for the department/transaction code. It is linked to UDT09 if the Direct Department feature is used.



You should use this UDT only for Deltek Time. If you use it, it should not be shown or required in Deltek Expense.

UDT04

UDT04 has the following attributes:

- Up to 20 positions
- Active/inactive
- Costpoint company code
- Rate

UDT04 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



Use UDT04 for the *Reference 1* field. Use it only if employees need to charge the *Reference 1* code in Deltek Time or if the *Reference 2* code is required on reports.



Use UDT04 for the *Reference 1* field. Use it only if employees need to charge the *Reference 1* code in Deltek Time or if the *Reference 2* code is required on reports.

UDT05

UDT05 has the following attributes:

- Up to 20 positions
- Active/inactive
- Costpoint Company code

UDT05 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



Use UDT05 for the *Reference 2* field. Use it only if employees need to charge the *Reference 2* code in Deltek Time or if the *Reference 2* code is required on reports.



Use UDT05 for the *Reference 2* field. Use it only if employees need to charge the *Reference 2* code in Deltek Time or if the *Reference 2* code is required on reports.

UDT06

UDT06 has the following attributes:

- Up to 20 positions
- Active/inactive
- Costpoint company code

UDT06 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.

You also have the option to specify labor rates for UDT06 codes in wage schedules to override an employee's hourly rate for labor costing purposes. To use this option, you must first select **Enhanced** in **Wage Determination** on the Miscellaneous tab of the Time configuration screen.



UDT06 is not mapped to any value. It is an ideal location for storing information by which you can print labor reports. An example would be a customer PO number.



Use UDT06 for the **GLC** field. Use it only if employees need to change their GLC code in Deltek Time or if the GLC code is required on reports.

UDT07

UDT07 is one of the most important UDTs in Deltek Time. The attributes of UDT07 are as follows:

- Up to 20 positions
- Can be linked to UDT01
 - Optionally different description
- Can be linked to UDT02
 - Optionally different description
- Active/inactive
- Costpoint Company code
- Rate 1 Rate — Typically used for labor rates
- Rate 2 Rate — Typically used for billing rates

Because of its attributes, you can link UDT07 to one of the prime UDTs (UDT02 or UDT01). More importantly, the UDT07 description can differ for the same UDT07 when it is linked to a different UDT01/UDT02. This makes UDT07 an excellent choice for data that is charge-specific and that requires a different description based on the UDT01/UDT02. For example, let's say that you use UDT07 as a labor category, and that a UDT07 of "P1" is "Programmer I" in the UDT07 table. For a specific Project/Job, you could use a different description such as "Programmer/Analyst."



Use UDT07 for the *Labor Category* field. The UDT07 table entries will be the "Company Specific" Labor Categories whereas the linked UDT01/UDT07 entries will be the "Job Specific" Labor Categories.



Use UDT07 for the *PLC* field. Use it only if employees need to change their PLC code in Deltek Time or if reports using the PLC code are required. It will be linked to UDT02 so that you can restrict the PLCs that are valid for Projects (UDT02).

UDT08

UDT08 has the following attributes:

- Up to 20 positions
- Active/inactive

UDT08 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



Use UDT08 for the *Trade Code* field. Use it only if employees need to charge their *Trade Code* in Deltek Time or if the *Trade Code* is required on reports.



Use UDT08 for the *Worker's Comp* field. Use it only if employees need to charge their *Worker's Comp* code in Deltek Time or if *Worker's Comp* code is required on reports.

UDT09

UDT09 is important because of its flexibility. It possesses the following attributes:

- Up to 20 positions
- Can be linked to UDT01
- Can be linked to UDT02
- Can be linked to UDT03
- Active/inactive
- Costpoint Company code
- Abbreviation

Because of its attributes, you can use UDT09 for many purposes. Common configurations either use UDT09 as some type of subnumber to the prime charge (UDT01 and/or UDT02), or as an organization field that can:

- Be filtered based on what charge is used, or
 - Filter the charge based on its value
-



This field is the *Suffix* portion of the account/contract number, and will link to UDT01. It will also link to UDT03 so that Department and Transaction codes can be limited based on the Suffix charged.



This field is the Organization. You can link it to Accounts (UDT01) or to Projects (UDT02).

UDT10

The attributes of UDT10 are as follows:

- Up to 20 positions
- Can be linked to Timesheet Classes
- Can require a comment
- Can be overtime
- Can be cost only
- Labor mapping
- Payroll mapping
- Active/inactive
- Required
- Rate 1
 - Factor amount
 - Fixed amount
 - Calculation method
- Rate 2
 - Factor amount
 - Fixed amount
 - Calculation method
- Recast labor
- Recast payroll
- Prorate
- Allow hours to be charged to future date

Use the special attributes of UDT10 with pay codes. You can limit the pay code by timesheet class (see the "Timesheet Classes" section), force comments when certain UDT10s are charged, indicate whether the pay code is overtime, map the pay code to a labor and/or payroll code, and so forth.

UDT11

The attributes of UDT11 are:

- Up to 20 positions
- Active/inactive

UDT11 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense notes and tips. No bolding or italics is used.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense. This UDT is reserved for passing the state code for the working state when you are using the Costpoint multi-state payroll capability.

UDT12

The attributes of UDT12 are as follows:

- Up to 20 positions
- Active/inactive

UDT12 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.

UDT13

The attributes of UDT13 are:

- Up to 20 positions
- Active/inactive

UDT13 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.

UDT14

The attributes of UDT14 are as follows:

- Up to 20 positions
- Active/inactive

UDT14 has no special attributes. Use this field to capture information that is not dependent on other UDT. Many companies use it to capture reference information.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.

UDT15

The attributes of UDT15 are:

- Up to 20 positions
- Active/inactive

UDT15 has no special attributes. Use this field to capture information that is not dependent on other UDTs. Many companies use it to capture reference type information.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.



You should use this UDT only for Deltek Time. If you use this UDT, it should not be shown or required for Deltek Expense.

Two Types of UDTs

There are two types of UDTs:

- **Charge UDTs:** representing prime charges, such as Project or Account.
- **Supplemental:** representing miscellaneous information that needs to be recorded for the charge.

Deltek Time supports one or two Charge UDTs. Typically, the UDT configuration is either one Charge UDT (UDT01) or two Charge UDTs (UDT02 and UDT01).

If UDT01 is the Charge UDT, the potential links to UDT07 and UDT09 give these UDTs enhanced flexibility, because you can assign a greater number of attributes to them. If UDT02 and UDT01 are the charge UDTs, the link between UDT02 and UDT01 applies. Under this configuration, you could require UDT02 and UDT01 on all timesheet lines or configure it so that sometimes UDT02 is not needed. No matter which configuration you use, UDT01 is always required.



UDT01 always serves as a Charge UDT because it contains the GL Account/Contract Number.

UDT02 can also serve as a Charge UDT if "Data Entry by WBS" is needed. This will require you to link UDT01 and UDT02. Because not all charges need a WBS, UDT01, UDT02/UDT01, and UDT02 are considered prime charges.



UDT01 usually serves as a Charge UDT because it contains the GL Account.

UDT02 can also serve as a Charge UDT if you are using Projects. This will require you to link UDT01 and UDT02. Depending on whether all charges need a Project, the following are considered prime charges:

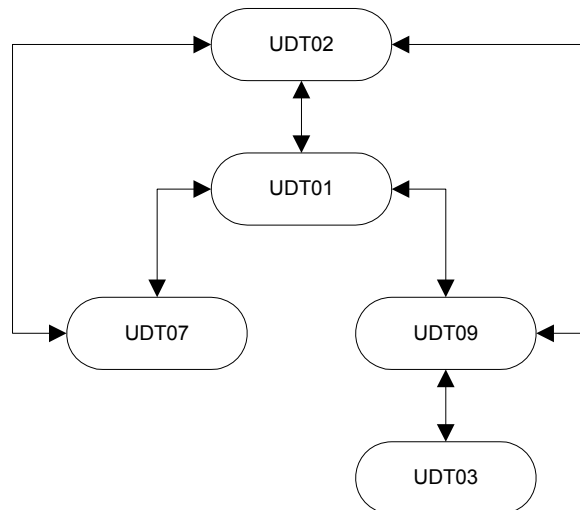
- UDT01 (If Project not Required on All Charges)
- UDT02/UDT01
- UDT02

UDT Links

You can link certain UDTs with other UDTs and use the associations to meet many business rules, as described in the "Timesheet Classes" section. With linkage, you can:

- Validate a UDT
- Restrict the use of certain UDTs

Thus, when a certain UDT is charged on a timesheet, you can restrict the valid values for another UDT by linking them together. For example, many companies link the GL Account to IDs, and Project IDs to Labor Categories. Most links are between Charge UDTs and Supplemental UDTs (for example, you might link labor/billing categories to the Charge). The following diagram will help you visualize the potential linkage options:



You can link two UDTs together, or link a single UDT to many others. Once enabled (in the **Links/Defaults** tab of the **Configuration** screen) your links can serve as either direct or wildcard links.

Direct Link

Use a Direct Link to link two specific UDTs. This type of link requires a link record for every combination. For example, if Project XYZ can only charge accounts ABC and ABCD, there will be two records linked like this:

Project	Account
XYZ	ABC

Project	Account
XYZ	ABCD

Use Direct Links to establish specific valid combinations. The volume of combinations, however, depends on your quantity of Projects and Accounts.



Whether the Project is restricted based on the Account or whether the Account is restricted based on the Project will depend on which UDT has higher priority and how default UDT values are populated. For more information, see the "UDT Hierarchy" section.

Wildcard Link

Use wildcard links to define links by criteria. The criteria are based on the UDT beginning or ending, or the values it contains. Wildcards can exist either on both sides of the link or just on one side. Please note that, even though wildcard links are used, direct links can still be implemented.

Example 1 — Wildcard on Both Sides

Project	Account
X%	%ABC

In this example, any Project beginning with "X" is valid with any Account beginning with "ABC," and any Account beginning with "ABC" is valid with any Project beginning with "X."

Example 2 — Wildcard on One Side

Project	Account
XYZ	ABC%
X%	ABCD

In this example, Project "XYZ" is valid with any Account beginning with "ABC," or any Account beginning with "ABC" is valid with any Project "XYZ." Also, any Project beginning with "X" is valid with any Account beginning with "ABC," and any Account beginning with "ABC" is valid with any Project beginning with "X."

Example 3 — Wildcard on Neither Side

Project	Account
XYZ	ABC
XYZ	ABCD
XYZ	ABCDE

The example is the same as the Direct Link example.

Example 4 — Mixed Direct and Wildcard Links

Project	Account
XYZ	ABC
XYZ	ABCD%

Including wildcards within links dramatically reduces the number of records Deltek Time must maintain in its link tables. Such a reduction:

- Increases the speed with which Deltek Time receives information from outside systems, or
- Reduces the capacity requirements needed to maintain the links manually within Deltek Time.

The valid syntax for links is as follows:

- "%" represents one or more positions.
- "_" represents one position.

Examples

Value	Notes
ABC%	Begins with ABC
%ABC	Ends with ABC
%ABC%	Contains ABC
AB_	Begins with AB and is three positions
_BC	Ends with BC and is three positions
A_C	Begins with A, ends with C, and is three positions
A_B%	Begins with A, and third position is B

UDT01/UDT02 Link

The UDT01/UDT02 Link is the only viable link between potential Charge UDTs. If you need to track both a Project ID and a GL number, this link represents the best choice, because they require an association, even though they are two different UDTs. Depending on the configuration, you can define a Charge to require a UDT01, or require a UDT02 with a UDT01.

Do not use this link to define structure within a charge. For example, suppose you have projects with tasks. Because specific task codes usually require different descriptions for each project, we recommend building both project and task structure into a single UDT, with delimiters placed between the two.

In addition, using Charge Trees provides greater accuracy in representing project structure.



The UDT01/UDT02 link is used only if you select "Data Entry by WBS" in GCS Premier. The link will be a direct link.



The UDT01/UDT02 link is always used. The link is a wildcard link because of the potential to use the Project Account Wildcard feature.

Please note the Account/Project combinations come from the following sources in Costpoint:

- Project Account Group
- Project Account Wildcard

UDT01/UDT07 Link

UDT01/UDT07 links potential Charge UDTs with Supplemental UDTs and offers the following special features:

- You can make the link required based on the UDT01. Even though the link is at the system level, you can turn it on or off at the UDT01 level. You can also have a specific UDT01 require a UDT07, meaning that you can have certain UDT01s that require a UDT07 and some that do not. If a UDT07 is required, you can define the valid "subset" of UDT07s in the link.
- You can make the link provide an override description for the UDT07. When you perform a Lookup on the UDT07, the description of the UDT01/UDT07 combination will display, rather than the description of the UDT07, although they can be the same. This means you can include special descriptions for UDT07s for a specific UDT01.



Because of the UDT07 description contained in the link, you cannot wildcard the UDT07 value. You can wildcard only the UDT01 value.



This link represents the link between contracts and labor categories. The UDT07 table represents the "Company Wide" labor categories and the UDT01/UDT07 Link table represents "Contract Specific" labor categories. Not all UDT01s require UDT07, as some UDT01s are GL Accounts. The link is a wildcard link because of its capacity for setting up job specific labor categories at the top level of the contract.



This link is not normally used with a Costpoint implementation.

UDT01/UDT09 Link

UDT01/UDT09 links potential Charge UDTs with Supplemental UDTs. The link does not provide the special feature found in the UDT01/UDT07 link. You can use wildcards on both sides of the link.



This link represents the link between GL Account/Contract and the Suffix. The UDT01/UDT09 Link table represents the valid suffixes for GL Account/Contract.



The UDT01/UDT09 is the valid Account/Org combination. You can use the link if Orgs are being downloaded to Deltek Time and there is a validation on the Account and the Org. The link will normally be a direct link because Costpoint does not allow the wildcarding of Account/Org combinations. The Account/Org table in Costpoint serves as the source for the data..

UDT02/UDT07 Link

UDT02/UDT07 links potential Charge UDTs with Supplemental UDTs and offers the following special features.

- You can make the link required, based on the UDT02. Even though the link is defined at the system level, you can turn it on or off at the UDT02 level. You can also have a

specific UDT02 require a UDT07, meaning that certain UDT02s will require a UDT07, while others will not. If a UDT07 is required, you can define the valid "subset" of UDT07s in the link.

- You can configure the link to provide an override description for the UDT07. Thus, when you perform a Lookup on the UDT07, the description of the UDT02/UDT07 combination displays, instead of the description of the UDT07 (although the two descriptions can be identical). This means that you can have special descriptions for UDT07s for a specific UDT02.



Due to the UDT07 description contained in the link, you cannot wildcard a UDT07 value. You can, however, wildcard a UDT02 value.



This link is not normally used with GCS Premier implementations.



This link represents the link between projects and PLCs. Not all projects require PLCs. The link is a wildcard link due to its capacity for setting up job-specific labor categories at the top level of the project.

UDT02/UDT09 Link

UDT02/UDT09 links potential Charge UDTs with Supplemental UDTs. The link does not provide the special features found in the UDT02/UDT07 link. You can use wildcards on both sides of the link.



This link is not normally used with a GCS Premier implementation.



The UDT02/UDT09 is the valid Project/Org combination. You can use the link if Orgs are being downloaded to Deltek Time and there is a validation on the Project and the Org. The link serves as a wildcard link because Costpoint does allow the wildcarding of Project/Org combinations. Please note the Project/Org combinations will come from each of the following sources in Costpoint:

- Project/Org/Account
- Project Org Wildcard
- Project/Account Group and Account/Org

UDT09/UDT03 Link

UDT09/UDT03 links two Supplemental UDTs. Similar to UDT07 Links, it provides override descriptions for the UDT03. You can use wildcards on the UDT09 side of the link.



This link is used only if you charge labor to Non-Labor Suffixes. The link can restrict Transaction codes to Non-Labor Suffixes and Department codes to Labor Suffixes.



This link is not normally used with a Costpoint implementation.

UDT Hierarchy

UDT Hierarchy determines which UDTs drive the validation and defaulting of other linked UDTs. This concept applies only to linked UDTs. This includes UDT01, UDT02, UDT03, UDT07, and UDT09. (Refer to the flowchart in the "UDT Links" section.)

The first factor in the UDT Hierarchy is the order of importance, that is, which UDTs are most sufficient. In general, these are the rules:

- UDT02 is higher than UDT01 when the two are linked.
- If UDT02 is linked to UDT07 and/or UDT09, UDT02 is higher.
- If UDT01 is linked to UDT07 and/or UDT09, UDT01 is higher.
- If UDT09 is linked to UDT03, UDT09 is higher.
- All unlinked UDTs reside at the lowest point in the heirarchy.

The second factor is the quality of the default. A default value from a lower UDT may drive the defaulting/validation of a more important UDT if the default value has higher quality. For example, let's say that UDT01 and UDT09 are linked. If a default value of quality exists for the UD09, that value will drive which UDT01 values are valid or can be defaulted. However, if the UDT09 does not have a high quality default, it is possible for the UDT01 to override the UDT09 and make the UDT09 dependent on the UDT01 value because of the order of importance. This may result in the UDT09 being recalculated or cleared, or it may force you to pick a UDT09 that is linked to the UDT01.

The quality of a default depends on where the default originated, as well as your configuration of Deltek Time. The sources of defaults are charge trees and employee history.

Charge Tree (Charge Default)

Charge Trees determine how charges are organized and presented to users within the timesheet. This enables you to restrict users to certain charges. A default associated with a Charge UDT (that is, a prime charge), must be used, making it a very high quality default. In fact, not even the user can change a Charge Default. If the default is for a UDT of lower importance (a Supplemental UDT), the UDT must be respected, even if the default is of higher importance. Charge Trees are discussed in the "Charge Trees" section of this guide.

Employee Charge Favorites (Favorites Default)

Users can select certain lines on their timesheets, save them as favorites, and select them in the charge Lookup so they load automatically. These favorites consist of those default UDT values present on the timesheet line at the time the line was added to favorites that either:

- Originated from Charge Tree
- Were manually added or changed
- Were added or changed via Lookup

A default associated with a Charge UDT (that is, a prime charge) must be used for a favorite, making it a very high quality default. In fact, not even the user can change a Favorite Default. If

the default is for a UDT of lower importance (a Supplemental UDT), the UDT must be respected, even if the default is of higher importance. Later, this guide discusses charge trees and favorites in greater detail.

Employee History (Employee Default)

You can set up defaults for specific employees in Employee History (located in the History tab of the Employee Information screen). The Employee History is date-driven, which means that an employee's default UDTs can change over time. A perfect example is a department code. The level of quality is determined by whether a particular default for the department can be recalculated, as determined by the configuration option. If the default cannot be recalculated, the value will be of high quality and higher UDTs must respect it. However, the user can change the employee default if the value is shown within the timesheet application.

If the lower UDT can be recalculated, Deltek Time will not ignore it. Deltek Time will default higher UDTs if they are blank. However, if Deltek Time cannot find a value for a higher UDT that is valid with the lower UDT, it will clear and default the lower UDT, or the user will be forced to change it.

UDT Configuration Options

In Deltek Time, you can configure UDTs in three locations:

- You can define whether UDTs are being used in the UDT Options tab of the General Configuration screen.
- You can further configure the UDTs in the Time Configuration screen.
- Additional configuration options can be found within each timesheet class.

General Configuration Options

This screen contains general configuration options for UDTs. Because this screen is part of both Deltek Time and Deltek Expense, pay special attention to whether your company is licensed for both products.

Use

To use a UDT, select the *Use* check box for that UDT in the UDT Options tab of the General Configuration screen. If you select this check box for a UDT, both Deltek Expense and/or Deltek Time will use the UDT. If you need to use the UDT in Deltek Time but not in Deltek Expense, you must select the **Use** check box here. You can then use the UDT Options tab in the Time Configuration screen to disable its use in Deltek Expense.

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT01	Yes	Yes	Account — Must be used.
UDT02	Rare	Rare	WBS — Used if "Data Entry by WBS" is selected.
UDT03	Typical	Typical	Department — You need to use UDT03 only if employees charge department or if you need reports by department from Deltek Time.

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT04	Rare	Rare	Reference 1 — You need to use UDT04 only if employees charge Reference 1 or if you need reports by Reference 1 from Deltek Time.
UDT05	Rare	Rare	Reference 1 — You need to use UDT05 only if employees charge Reference 1 or if you need reports by Reference 1 from Deltek Time.
UDT06	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.
UDT07	N/A	Typical	Labor Category — You need to use UDT07 only if employees charge Labor Category or if you need reports by Labor Category from Deltek Time.
UDT08	N/A	Rare	Trade Code — You need to use UDT08 only if employees charge Trade code or if you need reports by Trade code from Deltek Time.
UDT09	Yes	Yes	Suffix — Required.
UDT10	N/A	Yes	Pay Type — Required for Deltek Time
UDT11	N/A	Yes	Used by Costpoint clients only if using the multi-state payroll capability
UDT12	N/A	N/A	Does not map to any field in GCS Premier or Costpoint. This UDT may be useful for capturing data not transmitted to GCS Premier or Costpoint

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT13	N/A	N/A	Does not map to any field in GCS Premier or Costpoint. This UDT may be useful for capturing data not transmitted to GCS Premier or Costpoint
UDT14	N/A	N/A	Does not map to any field in GCS Premier or Costpoint. This UDT may be useful for capturing data not transmitted to GCS Premier or Costpoint
UDT15	N/A	N/A	Does not map to any field in GCS Premier or Costpoint. This UDT may be useful for capturing data not transmitted to GCS Premier or Costpoint

This table shows how UDTs are used in Deltek GCS Premier:

UDTs	Deltek Expense Use	Deltek Time Use	Notes
UD01	Yes	Yes	Account — Must be used.
UDT02	Rare	Rare	WBS — Used if "Data Entry by WBS" is selected.
UDT03	Typical	Typical	Department — You need to use UDT03 only if employees charge a department or if you need reports by department from Deltek Time.
UDT04	Rare	Rare	Reference 1 — You need to use UDT04 only if employees charge Reference 1 or if you need reports by Reference 1 from Deltek Time.
UDT05	Rare	Rare	Reference 1 — You need to use UDT05 only if employees charge Reference 1 or if you need reports by Reference 1 from Deltek Time.
UDT06	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.

UDTs	Deltek Expense Use	Deltek Time Use	Notes
UDT07	N/A	Typical	Labor Category — You need to use UDT07 only if employees charge Labor Category or if you need reports by Labor Category from Deltek Time.
UDT08	N/A	Rare	Trade Code — You need to use UDT08 only if employees charge Trade code or if you need reports by Trade code from Deltek Time.
UDT09	Yes	Yes	Suffix — Required.
UDT10	N/A	Yes	Pay Type — Required for Deltek Time
UDT11	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.
UDT12	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.
UDT13	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.
UDT14	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.
UDT15	N/A	N/A	Does not map to any field in GCS Premier. This UDT may be useful for capturing data not transmitted to GCS Premier.

This table shows how UDTs are used in Deltek Costpoint:

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT01	Yes	Yes Acco	unt — Required.

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT02	Typical	Typical	Project — You will use UDT02 unless projects are not used in Costpoint.
UDT03	N/A	Rare	Labor Location — You need to use UDT03 only if employees charge Labor Location or if you need reports by Labor Location from Deltek Time.
UDT04	Rare	Rare	Reference 1 — You need to use UDT04 only if employees charge Reference 1 or if you need reports by Reference 1 from Deltek Time.
UDT05	Rare	Rare	Reference 1 — You need to use UDT05 only if employees charge Reference 1 or need reports by Reference 1 from Deltek Time.
UDT06	N/A	Typical	GLC — You need to use UDT06 only if employees charge GLC or if you need reports by GLC from Deltek Time.
UDT07	N/A	Typical	PLC — You need to use UDT07 only if employees charge PLC or if you need reports by PLC from Deltek Time.
UDT08	N/A	Rare	Worker's Comp — You need to use only if employees charge Worker's Comp code or if you need reports by Worker's Comp code from Deltek Time.
UDT09	Typical	Typical	Org — You need to use only if employees charge Org or if you need reports by Org from Deltek Time.
UDT10	N/A	Yes	Pay Type — Required for Deltek Time
UDT11	N/A	Rare	Working State – Only required if you are using the multi-state payroll capability

UDT	Deltek Expense Use	Deltek Time Use	Notes
UDT12	N/A	N/A	Does not map to any field in Costpoint. This UDT may be useful for capturing data not transmitted to Costpoint
UDT13	N/A	N/A	Does not map to any field in Costpoint. This UDT may be useful for capturing data not transmitted to Costpoint
UDT14	N/A	N/A	Does not map to any field in Costpoint. This UDT may be useful for capturing data not transmitted to Costpoint
UDT15	N/A	N/A	Does not map to any field in Costpoint. This UDT may be useful for capturing data not transmitted to Costpoint

Order

To specify the order in which the UDTs display on expense Reports and/or timesheets, use the *Order* column in the UDT Options tab of the General Configuration screen.

Label

You can specify the description, or label, of the UDT in the *Label* column. Not only can you use singular and plural labels (*Plural Label* column), you can use any language.

Mobile Label

Because mobile devices have a more limited screen space, you may want to create abbreviated versions of UDT labels. In the **Mobile Label** column on the UDT tab, enter an abbreviated version for each applicable UDT. For example, if UDT 01 is "Account," the abbreviated version could be "Acct."



For information on installing and configuring Deltek Mobile Time, see "*Configure Deltek Mobile*" in the Appendix of this guide.

For information on using Deltek Mobile Time, see the Deltek Mobile Time online help, available from your handheld device, or also see the Deltek Mobile Time Quick Reference Cards, which are available from the following locations:

- The software download site, when you download the application
- The Deltek Customer Care Connect site at <http://support.deltek.com>

Size

You can configure the size of the UDT in the *Size* column. You can use up to 50 characters for UDT01 and UDT02 and up to 20 characters for UDT03 through UDT10.



You may want to make size of the UDT larger than its data capacity since Deltek Time uses this setting as the default column width.

The following shows the recommended sizes for UDTs in Deltek GCS Premier:

UDT	Size
UDT01	8
UDT02	6 – 25
UDT03	2
UDT04	1– 20
UDT05	1 — 20
UDT06	N/A
UDT07	2
UDT08	4
UDT09	2
UDT10	3
UDT11	N/A
UDT12	N/A
UDT13	N/A
UDT14	N/A
UDT15	N/A

The following shows the recommended sizes for UDTs in Deltek Costpoint:

UDT	Size
UDT01	1– 20
UDT02	6 – 30
UDT03	1 — 6
UDT04	1– 20
UDT05	1 – 20
UDT06	1 — 6
UDT07	1 – 6
UDT08	1 – 6
UDT09	1 – 15
UDT10	1 — 3
UDT11	2
UDT12	N/A

UDT	Size
UDT13	N/A
UDT14	N/A
UDT15	N/A

Time Configuration Options

The Time Configuration screen contains specific time configuration options for UDTs. The screen is available only if you are licensed for Deltek Time Collection.

Required

To require a value for the UDT on the timesheet line, select the **Required** check box for that UDT in the UDT Options tab of the Time Configuration screen.



You can also make UDT07 required depending on the properties of UDT01 and/or UDT02 if linking is used.

Default

If you want Deltek Time to calculate a UDT's default, select the **Default** check box in the UDT Options tab of the Time Configuration screen. This does not control whether the charge or employee default is used, but indicates whether Deltek Time will calculate a UDT if there is no default or if an employee default is invalid. You can use this feature to fix certain employee defaults, which means that, if the UDT cannot be calculated, it will control a higher UDT. See the "UDT Hierarchy" section for details.



You can use this feature to require an Account (UDT01) to be valid with the employee's default Org (UDT09), thus driving the Account by the Org.

Validate

To validate a UDT on a timesheet, select the **Validate** check box for that UDT in the UDT Options tab of the Time Configuration screen. Select this option for any UDT where you want the input for the UDT to be validated against the database.



This check box is valid only for non-linked UDTs, excluding UDT10.

Use this option to capture certain information not stored in Deltek Time. For example, you may need to track a Customer PO number not contained in Deltek Time. In that case you would not validate the Customer PO number UDT, but would allow your users to fill it in on their timesheets.

Show

To make a UDT visible to the user on the timesheet, select the **Show** check box for that UDT in the UDT Options tab of the Time Configuration screen.

Print

If you want a particular UDT to print on the timesheet, select the **Print** check box for that UDT in the UDT Options tab of the Time Configuration screen. You can print up to six UDTs on a standard timesheet.

Timesheet Class Options

At the timesheet class level, you can override the settings in the Time Configuration screen. Thus, the settings in the Time Configuration screen can serve as defaults for new timesheet classes.

You can override the following settings at the timesheet class:

- Required
- Default
- Validate
- Show
- Print



More information on timesheet classes appears later in the "Timesheet Classes" section in this guide.

Functional Roles

Use functional roles 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. You define the employees for a specific role in the Employee Groups screen. 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). You define the charges (UDT02 or UDT01) for a specific role in the UDT02 or UDT01 screen. You can also use the UDT02 or UDT01 screens to define which users have that specific role.
- **Employee and Charge** — This type of functional role has domain or access over both employees and charges.

A Supervisor will normally be an employee type role. In the Employee Groups screen, you can define certain users as Supervisors for specific employee groups. Project Manager will normally be a charge type role. In the Projects (UDT02) screen, you can define certain users as Project Manager for specific projects.

Permissions

When you assign a user a role over a group of employees or a specific charge, the user inherits the permissions configured for the role. The types of permissions that you can assign to a functional role are:

General Permissions

- **Modify Charges** — Determines whether users with this role can modify the charge in the UDT02/UDT01 screen. With this permission, the user can change information such as the active flag, start date, end date, and so forth.
- **Approve Charges** — Determines whether users with this role can approve hours charged to the UDT02/UDT01. This permission applies only if UDT02/UDT01 is configured for line level approval.
- **Modify Employee Data** — Determines whether users with this role over a specific employee group can modify the employee master screen for the employees contained in the group.
- **Modify Employee Group** — Determines whether users with this role over specific employee groups can modify those groups. With this permission, the user could add/remove employees, add/remove other owners (roles), and change charge tree access for specific groups.
- **Delegation** — Delegation is the ability of someone with a functional role to assign his role to someone else for a specific period of time. For example, a primary supervisor leaving on vacation may delegate to a backup supervisor. This delegation causes the backup supervisor to receive the workflow tasks that the primary supervisor would normally receive.

Deltek Time Permissions

- **View Timesheet** — Determines whether users with this role over specific employee groups can view the timesheets of employees within those groups.
- **Modify Timesheet** — Determines whether users with this role over specific employee groups can modify the timesheets of employees within those groups.
- **Approve Timesheet** — Determines whether users with this role over specific employee groups can approve/reject the timesheets of employees within those groups.
- **Load Employee Favorites** — Determines whether users with this role have favorites loaded automatically when they view missing timesheets of employees within specific employee groups.
- **View Schedule** — Determines whether users with this role over specific employee groups can view the work schedule of employees within those groups.
- **Modify Schedule** — Determines whether users with this role over specific employee groups can modify the work schedule of employees within those groups.
- **Approve Schedule** — Determines whether users with this role over specific employee groups can approve/reject leave request for employees within those groups.
- **View Rate 1** — Determines whether users with this role over specific employee groups can view the user-defined rate 1 on timesheets for employees within those groups. Since Rate 1 is typically used for labor rates, this information should be restricted. This permission applies only if Deltek Time has been populated with such rates and labor costing is turned on.
- **Modify Rate 1** — Determines whether users with this role over specific employee groups can modify the user-defined rate 1 on timesheets for employees within the groups. Rate 1 is typically used for labor rates, and so this information should be restricted. This permission applies only if Deltek Time has been populated with such rates and labor costing is turned on.
- **View Rate 2** — Determines whether users with this role over specific employee groups can view the user-defined rate 2 on timesheets for employees within those groups. Rate 2 is typically used for billing rates. This permission applies only if Deltek Time has been populated with such rates and labor costing is turned on.
- **Modify Rate 2** — Determines whether users with this role over specific employee groups can modify the user-defined rate 2 on timesheets for employees within those groups. Rate #2 is typically used for billing rates. This permission applies only if Deltek Time has been populated with such rates and labor costing is turned on.

Security Roles

Use security roles to organize application screen rights into common roles within Deltek Time. For example, you can create security roles for employees, HR staff, or project managers. Each role can have preset access (Full Rights, Browse Only, or No Rights) to certain screens. Create these roles by selecting the Security Roles screen in the Users & Groups menu in Administration. You must assign every employee a role in the Employee Information screen in the same menu. Deltek Time assigns a default role to new employees in accordance with the General Configuration screen.



Users not licensed for certain modules (Deltek Expense or Deltek Time) will not see screens related to those modules even if their Security Roles grant them access. See the "Licensing" section for a list of screens.

Apply Employee Level Security

In addition to setting up 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. Typically, only administrators use these two screens. With this feature, a system administrator can limit the individual administrators to a pool of employees that they maintain. A more detailed discussion of this feature can be found in the online help.



For all other screens, the employees that a user can see depend on his functional role over the employee group.

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 sees in the UDT01/UDT02 maintenance screens. Typically, only administrators use these two screens. With this feature, a super administrator can limit the individual administrators to a pool of charges that they maintain. A more detailed discussion of this feature can be found in the online help.

Modify Employee Role

This feature controls whether users with this security role can change another employee's security role in the Employee Information screen in the Users & Groups menu in Administration. The security role must have rights to the Employee Information screen for this setting to apply.

Modify Time Zone

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



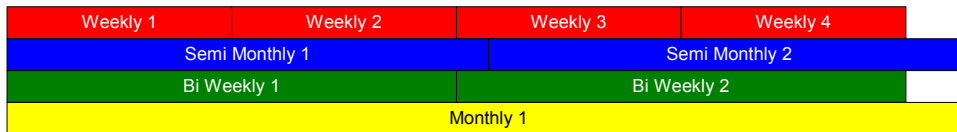
Deltek Time will ask employees who don't have an assigned time zone to select one when they log in for the first time.

Allow Delegation

This feature controls whether users with this security role can delegate their roles/responsibilities. Even with this feature enabled, users cannot delegate if they don't possess any roles over employees/groups or if they possess only roles that prohibit delegation.

Timesheet Schedules

Use timesheet schedules to provide starting and ending dates for timesheets and the scope of a specific period. Create timesheet schedules by selecting the Timesheet Schedules option in the Settings menu in Deltek Time. Timesheets are signed and approved according to the timesheet schedules. Examples of schedules are weekly, bi-weekly, semi-monthly, and monthly. Deltek Time supports multiple schedules, so you could have a weekly schedule ending on Friday and a weekly schedule ending on Sunday along with a Semi-Monthly schedule.



You can define timesheet schedules with the following characteristics:

- **Schedule Code** — This 10-position code identifies the schedule.
- **Year** — You can define multiple years, calendar or fiscal, for each schedule. Examples of years are 2002, FY02, and so forth.
- **Periods** — For each year, you can define multiple periods, each with a start date and an end date, for each schedule. For example, a semi-monthly schedule normally has 24 periods in a year.



Timesheet Schedules can equate to pay frequencies. You can map a user-defined field or the GCS Premier Pay Frequency to the timesheet schedule code in Deltek Time. You will not map the Pay Frequency if you have multiple cycles for the same frequency (for example, if you have a Weekly frequency ending on Friday and a Weekly frequency ending on Sunday).



Earlier versions of Costpoint will always be based on the mapping of the Costpoint Timesheet Cycle or a user-defined field.

Period Attributes

You can apply the following attributes to individual timesheet periods within each schedule:

Open

Select the *Open* check box in the Timesheet Schedules screen to indicate whether a period is open or closed. If a period is closed, all timesheets for that period are read-only.



If a timesheet period is not open, all timesheets are read-only, even though the following options allow certain modifications.

Modify Missing

Select the *Modify Missing* check box in the Timesheet Schedules screen to indicate that "Missing" timesheets can be entered. Missing timesheets are defined as timesheets that do not exist but should, meaning employees have not entered them yet.

Modify Open

Select the *Modify Open* check box in the Timesheet Schedules screen to indicate that "Open" timesheets can be changed. Open timesheets are defined as timesheets that exist but are not signed.



This option will not stop a timesheet from being signed. It will only prevent any further additions or changes.

Modify Signed

Select the *Modify Signed* check box in the Timesheet Schedules screen to indicate that "Signed" timesheets can be changed. Signed timesheets are defined as timesheets that have been signed but not yet approved.



This option will not stop a timesheet from being approved. It will only prevent any further additions or changes.

Modify Approved

Select the *Modify Approved* check box in the Timesheet Schedules screen to indicate that "Approved" timesheets can be changed. Approved timesheets are defined as timesheets that have been approved but not exported or processed.

Modify Processed

Select the *Modify Processed* check box in the Timesheet Schedules screen to indicate that "Processed" timesheets can be changed. Processed timesheets are defined as timesheets that are unchanged from being exported.

Modify Rejected

Select the *Modify Rejected* check box in the Timesheet Schedules screen to indicate that "Rejected" timesheets can be updated. Rejected timesheets are defined as timesheets that either have been signed and then rejected by the supervisor or exported to an external system and rejected.



These modify options often prove useful on timesheet day. For example, to ensure that a timesheet remains approved before export, you can lock it down by not selecting the *Modify Approved* check box.

Period Text

If you want text to be shown after the period ending date in the Timesheets screen and when timesheets are printed, enter that text in the **Period Text** column.

Here are two ways you might use period text:

- To display the fiscal week: 07/14/2007 (28)
- To indicate the payroll week when, for example, you have weekly timesheet periods and bi-weekly payroll: 07/14/2007 (Week 1)

When **Allow Timesheet Period Text** is not selected in the Time Configuration screen, the grid does not contain a **Period Text** column, so you cannot enter period text for timesheet periods.

Employee Assignment

You assign employees to timesheet schedules in the History tab of the Employee Information screen in Administration or through the import of employee history data. The employee history provides an effective date for the timesheet schedule and other assignments. Employees can belong to only one schedule on a specific date. If an employee changes from a weekly schedule to a semi-monthly schedule, the change takes effect on a certain date. If that date falls within the weekly period, the employee submits a timesheet for the partial week and a semi-monthly timesheet that starts the day after.

Split Schedules

Sometimes you must end a timesheet period prematurely because of some milestone date, such as a period end date. For example, timesheets are weekly and the company uses a calendar month instead of a 4-4-5 schedule. A week ends on February 3, and the company wants the timesheet to be split at January 31. One period is January 28 to January 31 and another is February 1 to February 3. There are two ways to accomplish this.



Stub Periods

This solution involves creating "Stub" periods, in other words, creating two periods from one. You have to define the start and end dates of the periods, and both portions of the timesheet period have to be signed, approved, and exported to the labor distribution system. The advantage of this solution is that you can process and export the timesheets for the first half of the week before the second half is complete. If timing is important, this option works well.

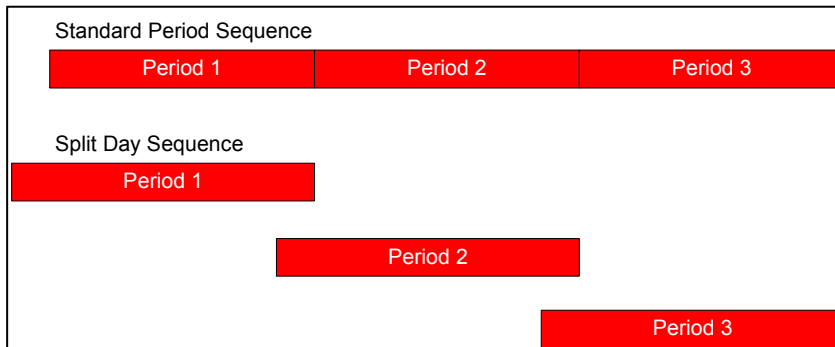
Split Exports

This solution involves splitting the week during the export process. You perform two exports, each with a different batch number. The first export includes one date range and the other export includes the other date range. With this method, you have only one period and only one signature and approval process. This option works well when timing is not important.

Split Days

Typically, a timesheet period starts after the previous one ends. For example, a semi-monthly schedule starts on the 1st and runs to the 15th, and the next starts on the 16th and runs to the end of the month. However, it is common for schedules to start and stop midday. For example, a weekly schedule might run from noon Friday to noon Friday the next week, so that employees can sign timesheets and have the approvals completed during business hours the same day. To support such schedules, you need to tweak the timesheet schedules to overlap the days. In addition, you need to define the standard hours for such days as "4" in the work schedule. See the next section for more information on Work Schedules.

Work Schedules



Work schedules define workdays, non-workdays, days off, and holidays. They provide Deltek Time with important information on the presentation and editing of time entry. Work schedules not only inform Deltek Time whether hours are expected, but how many are expected. You can also set up time entry for individual timesheet classes to fill in holiday and leave charges in timesheets automatically based on work schedules. And if you are using the option to generate exception-based timesheets for some employees, the **Generate Timesheets** utility uses employee work schedules to determine an employee's work days and total work hours, vacation days, and holidays for the timesheet period.

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Deltek Time supports multiple schedules. If you design the work schedules properly, it will be as though each employee has his or her own schedule.

Deltek Time also provides two schedule levels, Company and Employee.

Company Schedules

The company-level schedules typically consist of standard work and non-work days and company holidays. Each employee work schedule starts from one of the company-level schedules but often includes modifications, such as vacation days, that are specific to that employee.

To set up company schedules, click **Company Work Schedules** in the Setting menu in Deltek Time to open the Company Work Schedules screen.

Typically, a company has several standard schedules that Deltek Time administrator updates annually. The following are examples of such schedules:

- Full-Time with Holidays
- Full-Time without Holidays
- Part-time

Assign the appropriate company schedule to each employee on the History tab of the Employee Information screen. You can then modify the default schedule for individual employees.

Employee Schedules

Employee work schedules provide employee-specific overrides to the company schedule. To access these schedules, click **Employee Work Schedule** in the Schedule menu in Deltek Time. Use employee work schedules to adjust work and non-workdays and to track days off.

Supervisors, or employees themselves, can maintain employee work schedules, depending on access rights.



You can configure Deltek Time to require certain timesheet classes to submit vacation requests via the Work Schedules screen. Deltek Time routes these requests to the appropriate supervisor for approval or rejection.

Schedule Date/Day of Week Properties

You can set work schedule attributes at two levels within the company and employee schedules:

- **Day of Week:** You can set attributes for a large range of dates by clicking one of the column headings in the Work Schedules screen calendar. For example, you can select Monday and set up all Mondays as a work day with eight standard hours within a full-time schedule.
- **Specific Date:** You can set attributes for individual dates. For example, select July 4th and then set the attributes for that holiday. Specific date attributes override any day of the week attributes within the individual schedule (company or employee).

You can specify the following properties for individual days or days of the week in work schedules.

Work Day vs. Non-Work Day

Select the **Non-Work Day** check box in the Work Schedules screen to indicate that a day of the week or date is not a work day.



The **Flexible** check box in the Work Schedules screen controls whether a person can enter hours for a non-work day.

The **Standard Hours** field in the Work Schedules screen controls whether an employee is expected to record hours for a work day.

Holiday

Select the **Holiday** check box in the Work Schedules screen to indicate that a date is a company holiday.



The **Flexible** check box in the Work Schedules screen controls whether a person must enter hours against a holiday charge for that date.

Flexible vs. Non-Flexible

In the Work Schedules screen, select the **Flexible** check box if you want to:

- Allow entry of hours for a non-work day
- Allow entry of non-holiday hours for a holiday
- Allow entry of non-leave hours for a scheduled leave day

Standard Hours

For each day on the schedule, use the **Standard Hours** field to set a standard number of hours. Deltek Time uses this field to determine how many hours the employee should work and on which

days. Deltek Time totals the standard hours for the days in a timesheet period to derive the standard hours for the period. Even if a day is defined as a work day, Deltek Time will not expect any hours unless the value in **Standard Hours** for that day is greater than zero.



For part-time employees with flexible schedules, we recommend that the company schedules have zero hours for all work days so that Deltek Time will not report that the employee failed a floor check or worked fewer hours than scheduled. If needed, you can use employee schedules to specify the employee's personal schedule.

Default Time In and Out

The default time in and time out in company schedules provide the timesheet defaults for employees who are required to enter times in and out.

Default Non-Work Hours

The default non-work hours in company schedules are the number of idle hours expected during a work day (lunch hour, for example). This value provides the default value in the Timesheet screen if the employee is expected to enter time in/out.

Default Lunch Start/Stop Times

If your system is set up for entry of lunch start and stop times, the default lunch start and stop times in company schedules provide the default times for employee work schedules.

Leave

In employee schedules, click the **Leave** check box to indicate that the employee is taking time off on a day.

Lunch Hours and Times

In employee schedules, you can enter the expected number of hours for lunch.

Providing Deltek Time is set up to track start and end times for lunch, you can enter default start and end times for specific dates or days of the week for the employee.

Leave Hours and Times

When an employee takes leave on a particular date, you can enter the number of hours to be taken. You can also enter the start and end times for the time off.

On-Site Work Times

In employee schedules, you can enter the start and end time of the employee's on-site work hours for a specific date.

If the employee enters time in/out when completing timesheets, these times become the default time in and time out for the date.

Off-Site Work Hours and Times

If an employee is scheduled to for off-site work on a specific date, you can enter the expected off-site hours and the start and end times for that work.

Work Schedule Hierarchy

A hierarchy determines how Deltek Time finds the attributes for a specific date. The order of this hierarchy is:

- Employee Schedule — specific date
- Company Schedule — specific date
- Employee Schedule — day of week
- Company Schedule — day of week

Deltek Time will use the first set of attributes it finds.

Leave

Deltek Time helps you track an unlimited number of leave types. Deltek Time can also perform edits when employees claim leave. Examples of leave are Vacation, Sick, Holiday, and so forth. To track leave, you must define certain items for Deltek Time.

Leave Types

You can configure leave types in the Leave Types screen in the Settings menu in Deltek Time. Leave types are categories for various kinds of leave. For example, "Vacation" is a leave type. You can structure different vacation rules based on the type of employee, but the rules still would be under one leave type — "Vacation." You would need multiple leave types for vacation only for an employee with two separate balances.



GCS Premier supports only four leave types, although you can set up more in Deltek Time. The leave types in Deltek Time will be the "Short Description" in GCS Premier. If needed, you can set up additional leave types in Deltek Time for tracking purposes..



Costpoint also has leave types, which can be downloaded to Deltek Time. If needed, you can set up additional leave types in Deltek Time for tracking purposes.

Within each leave type, you can assign which UDT values identify leave taken by employees. Use Deltek Time configuration options to specify whether leave taken is identified by UDT01, UDT02, or UDT10.



Though leave is usually identified by the Account, UDT01, you can also set it up to be identified by Pay Type, UDT10. Of course, you must have the Pay Types to support this.



Though leave is usually identified by the Account, UDT01, you can also set it up to be identified by Pay Type, UDT10. Of course, you must have the Pay Types to support this.

For each leave type, specify whether the leave is Vacation, Holiday, or neither. Also specify those UDT values that identify leave charges in the timesheet. For example, you may decide that, when a Pay Type (UDT10) of "V" is used, it will be associated with the vacation leave type. You can associate multiple UDT values with a leave type.



You can associate a UDT value with more than one leave type. Although this is unusual, it does provide powerful capabilities in certain circumstances.

The best example is uncompensated overtime. Let's say your company allows employees to bank uncompensated leave of up to 100 hours a year for later use. You can set up one leave type to validate the balance available and another for the year-to-date banking.

You will need two UDT values, one for "banking" and one for "taking" the leave. Associate the "banking" and "taking" UDTs with the balance available leave type so that Deltek Time tracks the balance. Then set up rules for this leave type to prevent the minimum balance from dropping below zero. In addition, associate the "banking" UDT with the year-to-date banking leave type.

This leave type has a maximum balance of 100. Under this configuration, an employee can bank only 100 hours, regardless of the current balance.

Leave Rules

Once you define your leave types, you can set up your minimum and maximum balance rules in the Leave tab of the Timesheet Classes screen. These rules can differ according to the employee's timesheet class. Timesheet classes are categories of employees with business rules. The rules that relate to leave are:

- Minimum Balance Error Threshold — Employees cannot fall below this balance of hours.
- Minimum Balance Warning Threshold — Employees receive a warning after falling below this balance of hours.
- Maximum Balance Error Threshold — Employees cannot exceed this balance of hours.
- Maximum Balance Warning Threshold — Employees receive warnings after exceeding this balance of hours.

These rules come into effect when employees save their timesheets. Error messages block them from proceeding, whereas warnings allow them to continue.

Import of Leave Balances/Accruals

Deltek Time accepts the import of leave balances and/or accruals on a periodic basis. You can find the import details in the Deltek Time & Expense with ESS Technical Guide. You can import one of two different types of balances described below.

- **Rolling Balance.** This type of import contains an updated balance as of a certain date. The frequency of the import depends on how often the new balance is available in your HR/Payroll system. Each new import will include a newer "as of" date for the balance. This method works well if your HR/Payroll system cannot transmit the actual accruals. It's important to note, however, that with this method any history of leave before the "as of" date becomes inaccessible for inquiry purposes. Deltek Time displays only the latest balance and any leave charges after that date.



ADP users must use the Rolling Balance method because ADP loses the accrual transactions during its posting process.

- **Beginning Year Balance with Accruals.** With this type of import, Deltek Time receives a beginning year balance and any accrual transactions. The import can include the most recent accrual, or all accruals. The beginning balance and accrual transaction must be dated. Recent accruals display a more recent date. The beginning balance date does not change until you enter a new leave year. When you import a new beginning balance, all history records earlier than the date on the new beginning balance are cleared. This method provides an excellent leave history in Deltek Time for the current leave year.



The standard interface uses this method to import leave balances unless the leave is tracked monetarily.



The standard interface uses this method to import leave balances.

Timesheet Classes

Use timesheet classes to associate business rules with certain types of employees. You can have a virtually unlimited number of timesheet classes, but a typical company has fewer than 10. Examples of timesheet classes are "Hourly" or "Salary." Assign employees to timesheet classes in the History tab of the Employee Information screen. The employee history is date-driven and contains items such as the employee's timesheet schedule, work schedule, and UDT defaults, which means an employee can move from one timesheet class to another over time.



You can set up timesheet classes in GCS Premier. The class can be downloaded to Deltek Time via the interface.



You can use timesheet classes in Costpoint. This same class is downloaded to Deltek Time via the interface. You may need to evaluate whether your timesheet classes in Costpoint are sufficient for Deltek Time.

Business Rules

As mentioned, employees are tied to business rules by timesheet class. The following provides an overview of the more common business rules.

Hours Increment

In the **Hours Increment** drop-down list in the Basic Information tab of the Timesheet Classes screen, select the detail to which hours are entered into Deltek Time. The valid options are:

- Tenth
- Quarter
- Half
- Hundredth
- Whole

Revision Explanation

In the **Revision Explanation** drop-down list in the Basic Information tab of the Timesheet Classes screen, you can specify whether the user is required to supply an explanation when a revising a timesheet. The valid options are:

- Disabled — The user will not be able to enter an explanation.
- Optional — The user can enter an explanation, but it is not required.
- Required — The user is required to enter an explanation when revising a timesheet.

Time In/Out

In the **Time In/Out** drop-down list, located in the Basic Information tab of the Timesheet Classes screen, you can specify whether employees are required to enter time in/out times.



If your firm is licensed for Deltek Mobile Time and Time In/Out is enabled, members of this timesheet class won't be able to log on to Mobile Time.

The valid options are:

- Disabled — The Time In/Out icons will not display on the timesheets of employees assigned to this timesheet class.
- Required/Hard Edit — Employees receive an error message when attempting to sign their timesheets if:
 - Their timesheet hours and time in/out hours do not balance
 - If they enter timesheet hours without entering corresponding time in/out hours
 - If they enter time in/out hours without entering corresponding timesheet hours
- Required/Soft Edit — Employees receive an error message when attempting to sign their timesheets if they enter timesheet hours without entering corresponding time in/out hours or if they enter time in/out hours without entering corresponding timesheet hours. If they enter both timesheet hours and time in/out hours, however, and these do not balance, they will receive a warning.
- Required/No Edit — Employees receive an error message when attempting to sign their timesheets if they have entered timesheet hours without entering corresponding time in/out hours or if they enter time in/out hours without entering corresponding timesheet hours.
- Optional/Hard Edit — Employees receive an error when attempting to sign their timesheets if their timesheet hours and time in/out hours do not balance or if they have entered time in/out hours without entering corresponding timesheet hours.
- Optional/Soft Edit — Employees receive a warning when attempting to sign their timesheets if their timesheet hours and time in/out hours do not balance or if they have entered time in/out hours without entering corresponding timesheet hours.
- Optional/No Edit — Employees will not receive any errors or warnings. However, the Time In/Out icons will display so the employees can enter time in/out information.

Only regular hours (not cost-only) that are charged against a UDT01 type designated as time in/out are used when determining whether the timesheet hours balance with the entered time in/out hours.

Create Interim Charges

You have the option to allow employees assigned to a timesheet class to enter time against UDT01 or UDT02 codes that don't currently exist in your Deltek Time configuration. These timesheet rows are called interim charges. To do this, first select the **Create Interim Charges** check box on the Basic Information tab and then indicate in **Interim Edit** how you want Deltek Time Collection to respond when an employee tries to sign a timesheet that contains rows for interim charges. Choose between these three editing options:

- Allow the employee to sign the timesheet without a warning or error.
- Warn the employee that the interim status needs to be removed but allow them to sign the timesheet.
- Prevent employees from signing the timesheet until the interim status has been removed.

The interim status for a charge can be removed either by displaying the code in the UDT01 or UDT02 screens and clearing the **Interim Charge** check box or by importing the UDT01 or UDT02 code from Costpoint or GCS.

Use the **Events** screen to set up the creation of an interim charge as an event, with employee or other notifications specified for the timesheet class. If you do, any notifications defined for that event are sent automatically when an employee creates an interim charge during timesheet entry. (You can also set up employee notifications for the event on the Notifications tab of the Timesheet Classes screen.)



If your system is set up to provide charge lookups using direct access to a Costpoint database, **Create Interim Charges** is not available. All charges must already be authorized for the employee in Costpoint.

Must Use Reverse Timesheet

In the Basic Information tab of the Timesheet Classes screen, select the *Must Use Reverse Timesheet* check box to indicate that employees of this class must first use the reverse timesheet application option before correcting any previously processed timesheet lines. This option creates negative copies of all existing timesheet lines that are read-only. In addition, it creates a positive image that the user can correct. You should select the *Must Use Reverse Timesheet* check box if the employees of the timesheet class have their timesheets auto-adjusted outside Deltek Time. You must select it if the timesheets are prorated within Deltek Time.



The Reverse Timesheet feature should not be used on any timesheet that includes more than 250 lines.

Prorate Hours at Signature

In the Basic Information tab of the Timesheet Classes screen, select the *Prorate Hours at Signature* check box to enable employees of this class to have their hours prorated to standard hours when they sign their timesheets.



For further information on hour proration, refer to the online help for the Timesheet Classes screen.

Generate Exception-Based Timesheets

To generate timesheets containing default hours for employees assigned to the timesheet class, select the **Generate Exception-Based Timesheets** check box.

This option accelerates the time entry and approval process for employees who normally always enter the same number of hours to the same charge codes each period.

For more on generating exception-based timesheets, see the online help for the Generate Timesheets utility.

Allow Off-Line Timesheets

Select the *Allow Off-Line Timesheets* check box to enable the off-line timesheets feature. It supports the recording of timesheet charges and hours when users are not connected to Deltek Time by allowing them to create an updatable Microsoft Excel spreadsheet version of their timesheets. When they do reconnect to Deltek Time, they can merge the data contained in the spreadsheet back into the online timesheet.

Custom Overtime Dialog

Select the **Custom Overtime Dialog** check box if you want the custom overtime dialog box to open when a timesheet for an employee with this timesheet class is approved.

Populate Scheduled Leave on Timesheet Open

Select the **Populate Scheduled Leave on Timesheet Open** check box if you want Time & Expense with ESS to automatically enter holiday and scheduled leave hours when employees open new timesheets.

In addition to selecting this check box for the employee's timesheet class, the following are also required:

- In the Preferences screen for the employee, the **Load Favorites** check box must be selected.
- The employee must designate one (and only one) favorite as a holiday charge.
- The employee must designate one (and only one) favorite as a leave charge.

Export In-Process Timesheets

If you export timesheets to Costpoint 5.1 or a later version of Costpoint, Time & Expense with ESS gives you the option to export unsigned or unapproved ("in process") timesheets. This option can accelerate the billing process and provide more accurate data in Costpoint for reporting.

To implement this feature, first activate it on the Export Options tab of the Time Configuration screen and then select **Export In-Process Timesheets** in the Timesheet Classes screen for those timesheet classes for which you want to export in-process timesheets.

Costpoint/Mobile Lookup Options

The check boxes in the **Costpoint/Mobile Lookup Options** group box are only available if your system is either set up so that users can look up charges directly from a Costpoint database rather than using charge trees or if your system is licensed for Deltek Mobile Time.

For employees assigned to this timesheet class, the check boxes control which lookup tabs are available in the Charge Lookup of the Record Time menu or which options are available for lookup in the Search Charge Lookup of Deltek Mobile Time.

- **Show Project** — Select Show Project to enable employees of this timesheet class to select UDT02-related charges when completing their timesheets in either the Record Time menu or Deltek Mobile Time..
- **Show MO** — if you want the MO tab in the Charge Lookup dialog box to be available for selecting MO-related charges when a timesheet is being entered for an employee assigned the timesheet class.
- **Show Account** — Select Show Account to enable employees of this timesheet class to select UDT01-related charges when completing their timesheets in either the Record Time menu or Deltek Mobile Time. The Account tab provides a list of charges with UDT01 but no UDT02.



For information on installing and configuring Deltek Mobile Time, see “*Configure Deltek Mobile*” in the Appendix of this guide.

For information on using Deltek Mobile Time, see the Deltek Mobile Time online help, available from your handheld device, or also see the Deltek Mobile Time Quick Reference Cards, which are available from the following locations:

- The software download site, when you download the application
- The Deltek Customer Care Connect site at <http://support.deltek.com>

Start and Stop Times

Labor laws in some states (California, for example) require that, in some cases, employees must track and record start and stop times for each new task. They may also need to track start and stop times for breaks and meals. When you set up a timesheet class, you have the option to require that employees assigned to that class enter start and stop times.



This feature cannot be used along with the timesheet class options to:

- Enter "in" and "out" times
- Generate timesheets with default hours
- Allow off-line timesheets
- Allow employees to view or modify hourly rates

If you want employees to enter start and stop times, none of these other options can be selected for the timesheet class. Additionally, if your firm is licensed for Deltek Mobile Time and Start/Stop Times is enabled, members of this timesheet class won't be able to log on to Mobile Time.

To enable this feature for a timesheet class, on the Basic Information tab, use the settings under **Start/Stop Times**. In **Mode**, enter your preferences concerning when and if employees should enter start and stop times:

- If you don't want employees to enter start and stop times, select **Disabled**.
- If you only want employees to enter start and stop times for breaks and meals, select **Break**.
- If you want employees to enter start and stop times for work time as well as for meals and breaks, but not for specific charge rows, select **Breaks/Summary Work**.
- If you want employees to enter start and stop times for individual charge rows as well as for meals and breaks, select **Breaks/Detail Work**.

In **Edit**, indicate if you want Time & Expense with ESS to respond with no edit, a soft edit, or a hard edit when either of the following occurs:

- An employee signs a timesheet with a start time but no matching stop time
- An employee saves a timesheet in which the hours calculated for a date from start and stop times don't match the hours entered on the timesheet itself

Use **Rounding** to indicate if you want the hours calculated from start and stop times to be rounded up or down. In either case, the hours calculated from times are rounded based on the selection in **Rounding** and on the selection in **Hours Increment**.

User Defined Rates

The Basic Information tab of the Timesheet Classes screen contains a section that defines the employee's rights over the two user-defined rates. Configuration settings determine whether these rates are used or not. You can grant an employee the following rights:

- View — This option determines whether or not the employee can view the rate specified.
- Modify — This option determines whether or not the employee can modify the rate specified.

Schedule Rights

The settings under **Schedule Rights**, located on the Basic Information tab of the Timesheet Classes screen, control how employees assigned to the timesheet class request leave and what work schedule properties they can set.

Using these settings, you can:

- Indicate that employees assigned to the timesheet class must request leave using the Work Schedules screen and have it approved
- Specify which employee work schedule properties (standard work hours, for example) employees assigned to the timesheet class are allowed to change

Export

Deltek Time supports the export of time entries to a labor distribution and/or payroll system. You can choose whether you require one destination, both, or neither. To make your selection, use the **Export** group box in the Basic Information tab of the Timesheet Classes screen.



You should use labor distribution because the labor distribution feeds GCS Premier's payroll. You can use the payroll export if Deltek Time needs to feed an outside payroll system. In this case, it would still feed the labor distribution to GCS Premier.



You should use labor distribution because the labor distribution feeds Costpoint's payroll. You can use the payroll export if Deltek Time needs to feed an outside payroll system. In this case, it would still feed the labor distribution to Costpoint.

UDT Options

You can configure each timesheet class to have different UDT options in the UDT Options tab. For example, one timesheet class may display a certain UDT while another does not. A particular UDT may be validated for one timesheet class but not for another. Once created, each timesheet class defaults to the UDT options set in the Time Configuration screen, after which you can select one of the following override options within the timesheet class:

- Required
- Default
- Validate
- Show
- Print

Regular Hours Rules

In the Regular Hours Rules tab of the Timesheet Classes screen, set the regular hours rules. For each class, several useful regular hours rules govern the process once the timesheet is signed. Regular hours are hours charged against a Pay Type (UDT10) that is not defined as overtime. Below is a synopsis of the rules:

- **Daily** — Deltek Time performs minimum and maximum daily regular hour edits. These edits validate the hours recorded on workdays as defined in employee work schedules. You can define the edits as hard, soft, or disabled. A hard edit results in an error message and will not allow employees to sign their timesheets. A soft edit results in a warning but will allow employees to proceed.
- **Period Standard** — Deltek Time performs separate edits when submitted hours exceed or fall short of the timesheet period's standard number of hours. Deltek Time calculates the period's standard number of hours by adding the standard hours for each day within the timesheet period (based on the employee's work schedule). Separate edits operate when hours fall short of or exceed the standard number. You can define each edit as hard, soft, or disabled. A hard edit results in an error message and will not let employees sign their timesheets. A soft edit produces a warning but will let employees proceed.
- **Weekly** — Deltek Time performs minimum and maximum edits for your week, which is defined as starting on a certain day. This edit can cross over from the current timesheet to the previous. In fact, a timesheet can contain multiple weeks, for instance, as in a semi-monthly period. You can define the edits as hard, soft, or disabled. A hard edit produces an error message and will not allow employees sign their timesheets. A soft edit results in a warning but will let employees proceed.
- **UDT01 Type** — UDT01s are categorized to a type. At the type level, you can establish daily minimums and maximums. For example, holiday leave might serve as a type. If you set a minimum of eight hours and a maximum of eight hours for this type, this edit would require that holiday time be recorded in eight-hour increments. You can define this edit as hard, soft, or disabled. A hard edit produces an error message and will not allow employees to sign their timesheets. A soft edit results in a warning but will let employees proceed.



Hours charged to UDT10s that are defined as "Cost Only" are not used in the calculation of regular hours. Hours charged to leave charges are not included in the Weekly edit of minimum regular hours. They therefore do not count towards hours worked for overtime purposes.

Overtime Hours Rules

Time & Expense with ESS supports a variety of approaches to overtime calculation, and these approaches can differ from one timesheet class to another. You can configure Deltek Time to provide the common time-and-a-half after 40 hours, or you can configure it for more complex overtime requirements such as those for the state of California.

Use the OT Hours Rules tab in the Timesheet Classes screen to set up overtime validation rules for each of your timesheet classes. You can specify separate overtime rules for weekly, daily, and seventh consecutive work day. The information you specify on this tab is used during time entry to:

- Determine if hours entered should be treated as overtime hours based on work hours for the day or week
- Include overtime hours already worked when determining whether to apply the regular or overtime rate to new hours worked.

- Verify that overtime hours are entered for a UDT10 code (pay type) with the correct overtime rate
- Provide the correct level of edit for entries that violate the rules

For each type of overtime—daily, weekly, and seventh consecutive work day—you can specify the level of editing and one or two thresholds, each with its own overtime rate. (A "threshold" is the number of work hours for a day or week beyond which employees are paid an overtime rate.)

Pay Type (UDT10) Restrictions

Use the Pay Type Links tab, located in the Timesheet Classes screen to specify the kinds of pay types the UDT10s employees in a class can use. For example, you could use this feature to prevent "Salary" employees from charging 1.5x overtime. In addition, you can control the following for each type:

- Allow Lookup — This check box allows you to control whether the pay type displays in the Lookup dialog box, even when it is valid for the timesheet class.
- Allow Manual Entry — This check box allows you to control whether the pay type can be manually entered, even when it is valid for the timesheet class.

Leave Rules

In the Leave tab of the Timesheet Classes screen, you can link leave types to Timesheet Classes to track the leave type for the employees of that class. You can also define balance rules for each leave type. Below is a synopsis of the rules available:

- Minimum Balance Error Threshold — Employees cannot fall short of this balance of hours.
- Minimum Balance Warning Threshold — Employees receive a warning message when they fall short of this balance of hours.
- Maximum Balance Error Threshold — Employees cannot exceed this balance of hours.
- Maximum Balance Warning Threshold — Employees receive a warning message when they exceed this balance of hours.

With these edits, you can warn employees when they get close to a certain balance and prevent them from exceeding another.

Event/Workflow Notifications

In the Notifications tab of the Timesheet Classes screen, you can configure Deltek Time to notify users of certain defined events. The notification can be an external email, an internal alert, or an actual "To Do" list item within Deltek Time. You can customize these notifications for the timesheet class. One particular class of employees might receive a notification that other classes do not. For more details, see the discussion of events in the "Workflow" section.

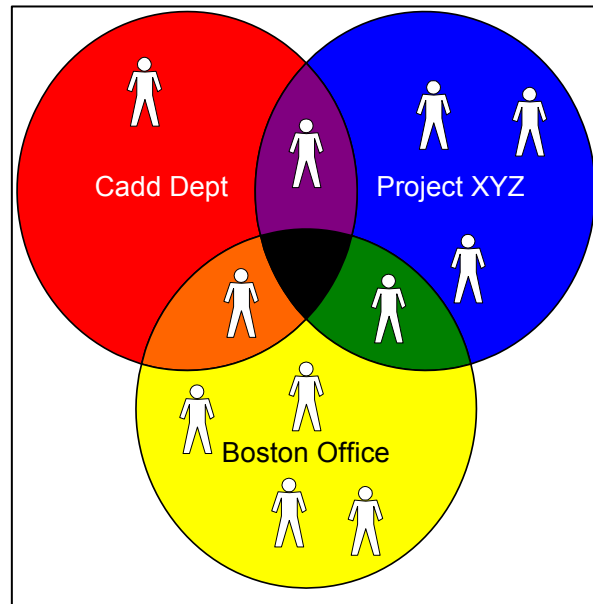
Employee Groups

In the Employee Groups screen in the Users & Groups menu in Administration, you can logically group employees to:

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

Employee Groups can consist of a department, office, division, project, and so forth. In general:

- You can assign employees 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 assigned.
- Groups may or may not have 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 uses group types to filter the list of groups displayed. More importantly, you can restrict an employee to one group of this type. Then, when you add an employee to a group of this type, he is automatically removed from any other group of this type.

Members vs. Owners

Groups have members who are called employees and owners who are called supervisors or administrators. A member inherits the charges and owners assigned to the group, whereas owners have rights over the members of the group. You can classify owners by the function they perform.

Owners can have the following rights, which are set up in the Functional Roles screen in the Users & Groups menu in Administration:

- Modify Charges — available for both Time and Expense
- Approve Charges — available for both Time and Expense
- Access Employee Data — available for both Time and Expense
- Modify Employee Group — available for both Time and Expense
- View Timesheet — available for Time
- Modify Timesheet — available for Time
- Approve Timesheet — available for Time
- View Work Schedule — available for Time
- Modify Work Schedule — available for Time
- Approve Work Schedule — available for Time
- View Rate 1 — available for Time
- Modify Rate 1 — available for Time
- View Rate 2 — available for Time
- Modify Rate 2 — available for Time

Employee Group Examples

Given these general concepts, let's illustrate some examples of employee groups with concrete examples.

Employee Groups by Primary Supervisor

Employee groups are commonly created around the primary supervisor. The purpose of such groups is to 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.
- The group has one primary supervisor assigned with appropriate modification and approval authority.
- The group has one or more backup supervisors assigned with appropriate modification and approval authority.
- Charges are not usually granted in this type of group.

Employee Groups by Department/Organizational Unit

It is also common to create groups by department or organizational level. If your organization has many levels or tiers, you can define each level as a group type and have 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. These can include charges such as overhead, leave, and others
- Assign backup supervisors
- Common attributes for this type of group are:
 - The group ID can be the department/organizational code
 - The group type restricts membership to one group of this type (level)
 - The group has one primary administrator assigned with appropriate modification and approval authority
 - The group has one or more backup administrators assigned with appropriate modification and approval authority
 - The group type allows you to assign overhead charges, and in some circumstances, direct project charges

Employee Groups by Company/Division

You can create groups organized around high-level organizational units for the same purposes as those structured around lower ones. Additional advantages include:

- Selection criteria during the export of timesheets.
- Restrictions regarding which employees an administrator can see
- 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
 - The group has one primary administrator assigned with appropriate modification and approval authority
 - The group has one or more backup administrators assigned with appropriate modification and approval authority
- Grant charges at this level, especially if you need to prevent one company/division from charging another company/division's charges -- note that the charges should include "office" as a part of their hierarchy

Employee Groups by Office

Groups structured by office are similar to other organizational units except that they are based on location. Most companies assign administrators that are responsible for a specific office's timesheets. It is also common to have certain charges that are office related.

Common attributes for this type of group are as follows:

- The group ID can be the office code.
- The group type restricts membership to one group of this type.
- The group has one primary administrator assigned with appropriate modification and approval authority.
- The group has one or more backup administrators assigned with 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 include "office" as a part of their hierarchy.

Employee Groups by Project

Groups by project 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 as follows:

- 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 include "office" as a part of their hierarchy.

Employee Groups by Type of Employee

Groups based on employee type provide certain advantages. As an example, you can create a group that includes all "Senior Engineers." The main purpose of this type of group is reporting, and its common attributes include:

- 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 the importance of employee groups and the complex numbers involved, maintaining employee groups can be a daunting task. Currently, you can maintain them either manually, through Deltek Time, or automatically, via system interface. Unless you have access to an outside system that contains such organizational information, you will need to maintain it in Deltek Time. However, if most of the data resides in outside systems, you can perform the bulk of the maintenance through the Deltek Time interface.



GCS Premier features an improved interface for Deltek Time & Expense with Self Service that creates groups using the following Employee Master fields:

- Division
- Department
- OB.S
- Supervisor
- Locator Code
- Locator #1
- Locator #2
- Locator #3
- Locator #4
- Locator #5
- Default Suffix
- Default Labor Category

Employees are segregated into the appropriate groups based on the data in GCS Premier. You must, however, assign the appropriate supervisors and administrators to these groups in Deltek Time\Expense\Self Service. This includes both primary and backup supervisors. Earlier versions of the interface do not include group information. This means you must set up groups and maintain them within Deltek Time & Expense with Self Service.



If you are running Costpoint version 4 or later, the program will create the following employee groups, based on the Manage Employee Information fields, when you use the Costpoint Export Data to Deltek Time and Expense application:

- Org (Every Level)
- Supervisor
- Manager

If you are running Costpoint version 5 or later, the program will create the following employee groups, based on the Manage Employee Information fields, when you use the Costpoint Export Data to Deltek Time and Expense application:

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

Employees are segregated into the appropriate groups based on the data in Costpoint. You must, however, assign the appropriate supervisors and administrators to these groups in Deltek Time. This includes both primary and backup supervisors. Earlier versions of the interface do not include group information. This means you must set up groups and maintain them within Deltek Time.

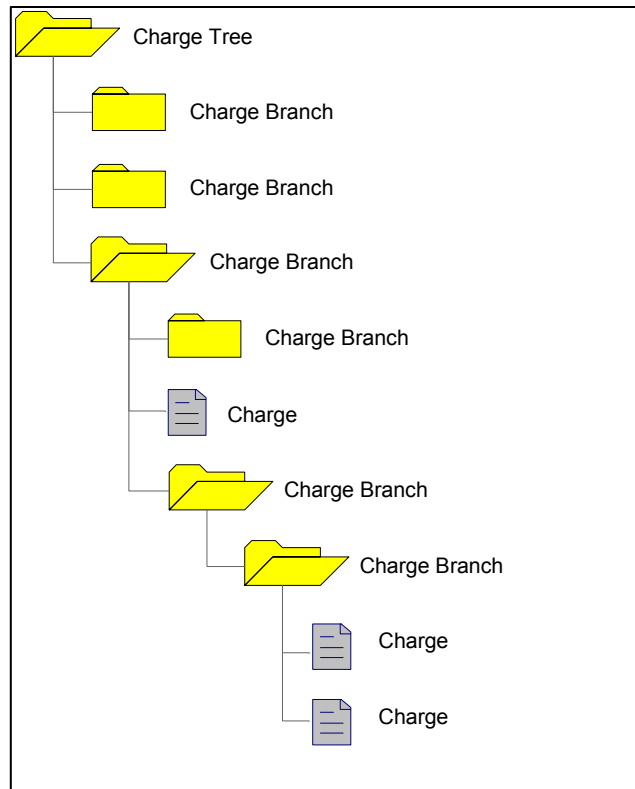
Charge Trees

Charge trees determine how charges are presented and authorized. In their flexibility charge trees reflect the nature and structure of Deltek Time itself. The structure of charges can change between systems and even within a charge tree. Before proceeding further, let's examine the anatomy of a charge tree.

At the top level of a charge tree is the **Tree** itself. Trees can represent offices, projects, type of charges, and just about anything else. Deltek Time can engage virtually an unlimited number of trees.

Trees are further broken down into **Branches**. Again, branches can represent anything. Branches can have more branches below them. There is no limit to the number of branches in a tree structure. The branches add structure to the tree and provide the logical organization of charges within the tree.

A **Charge** is a generic term that identifies a specific combination of UDT values. For example, a charge might be a project ID or a project ID/labor category combination.



Trees

As mentioned earlier, you can set up a virtually unlimited number of charge trees within Deltek Time. At the top level, charge trees represent the first breakdown of charges. The charge Lookup function in the timesheet application first displays a list of the charge trees to which the user has access. From there, a user can drill down into a specific tree or use other functions. Because trees are visible to users and represent the first breakout of charges, it is important to plan how your charge trees will be structured. Common types of trees are:

- Type of Charge (Overhead, Leave, Project, Bid and Proposal, and others)
- Company/Division
- Office
- Client



Because Charges are not allowed at the Tree level, you should not define Trees as "Projects" unless you plan to start actual Charges at a lower level. Charges are allowed only after the first Branch level. If you can incur expenses at the project top level, the project and its structure must start at the first Branch level.

Branches

Branches represent the structure within a charge tree. Branches are not chargeable entities. Think of them as the directory structure within the tree. When a user drills into a charge tree, he is presented with the branches under that tree to which he has access. Further drilling may result in more branches or even charges being displayed. The number of branch levels within a tree is virtually unlimited, and the meaning of each level can differ from tree to tree. The organization of your various projects can be represented in the charge branch structure. For example, a tree could be "Projects," the first branch could be "Project XYZ," the next-level branches could be tasks "001" and "002," and the next level could represent the subtasks. However, this structure may not work for an "Overhead" tree, which may be broken out into types of overhead.

Charges

Charges are the final level. A charge is a combination of UDTs that users can charge on their timesheet. Charges can be found within any branch level. The same charge can be found in multiple instances within a tree or in different trees. Examples of charges are:

Project (UDT02)	Account (UDT01)	Labor Category (UDT07)	Pay Type (UDT10)	Description
NASA.001				NASA task 001
NASA.001	500.001			
NASA.001		SE		NASA task 001 Senior Engineer
	200.001		VAC	Vacation
	700.001			Overhead — Accounting

Depending on how you configure your UDTs, your charges may look different.



Charges must have at least one prime UDT. See the "Types of UDTs" section in this guide for further information.

Authorizations

You can prevent users from having access to certain trees, branches, or charges.

Tree Authorization

Charge trees have only two attributes: a description and an indicator restricting it to certain employee groups. A charge tree can have three states:

- Public — No employee group restrictions exist
- Denied — Employee group restrictions exist, and this user is not a member of one of the groups
- Granted — Employee group restrictions exist, and this user is a member of one of the groups

Branch Authorization

Like trees, you can restrict branches to certain employee groups. A charge branch can have three states:

- Public — No employee group restrictions exist
- Denied — Employee group restrictions exist, and this user is not a member of one of the groups
- Granted — Employee group restrictions exist, and this user is a member of one of the groups

Charge Authorization

Charge authorizations differ from tree and branch authorizations in that the authorization/restriction occurs at the employee level, rather than the employee group level. A charge has the same three states:

- Public — No employee group restrictions exist
- Denied — Employee restrictions exist, and this user is not one of the employees
- Granted — Employee restrictions exist, and this user is one of the employees



This authorization is equivalent to "Contract Work Force."



This authorization is equivalent to "Project Work Force."

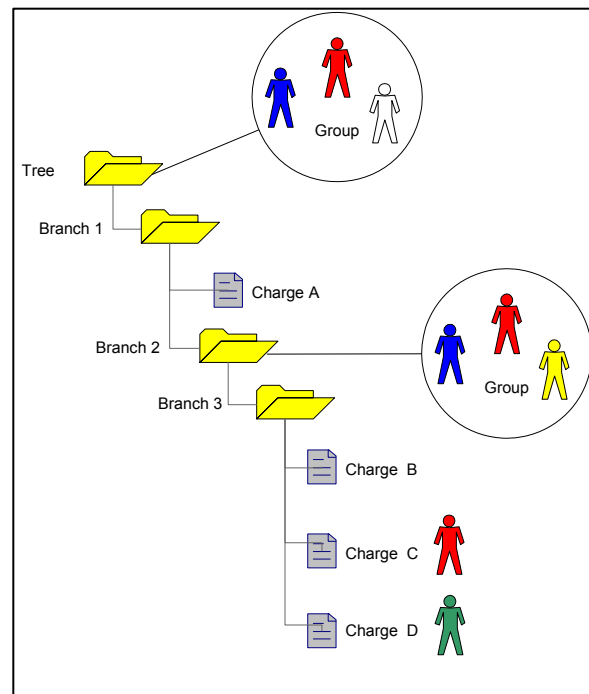
Hierarchy/Inheritance

Because authorizations can occur within any level in the tree, an employee's access to a specific charge can default from many places. In general, the rules are:

- If a charge has a restriction list of employees, only employees on that list can charge it, regardless of higher authorizations.
- If a charge does not have a restriction list, Deltek Time checks the higher levels until it finds a restriction list or reaches the top of the charge tree.

The picture shows how these rules apply. Here, the following charges are authorized:

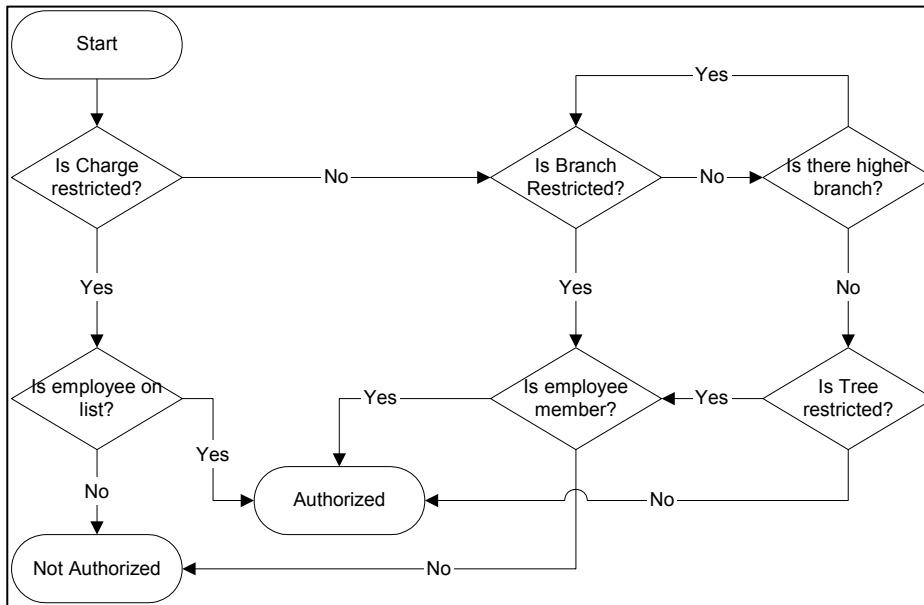
- Charge A — Employees: Red, Blue, and White
- Charge B — Employees: Red, Blue, and Yellow



- Charge C — Employee Red
- Charge D — Employee Green

Authorized Charge Logic

The following flowchart depicts the authorization logic:



Allow Unauthorized Charging

This system-wide setting allows employees to use unauthorized charges; though they must consider that:

- No charges appear in Charge Lookup, and the employee must manually enter drill-downs.
- The charges appear in red in Employee favorites.
- The charges cannot be searched.



If you set up your system to provide charge lookup through direct access to a Costpoint database, the option to allow entry of unauthorized charges is not available. Employees can only use charges for which they are currently authorized in Costpoint.

UDT Types

You can assign usage to both UDT01 and UDT02 in Time, Expense, or both. These settings have a profound effect on the charge trees. For example, if UDT01 is assigned to a charge, and it cannot be used for expenses, that charge will NOT appear in the charge Lookup and will not be treated as a valid charge in the Expense Report screen.

Standard Versus Advanced Charge Lookup

With the hierarchical structure of Charge Trees, numerous charges can be scattered within the Branches of the Trees, and they can be restricted at the charge, branch, and/or tree level. Nevertheless, as an employee performs a charge Lookup, Deltek Time must determine what displays initially, as well as what displays as the user drills down into a specific tree. Currently, Deltek Time allows for two different display behaviors:

- **Standard Charge Lookup** determines what is displayed at each level as the user drills down, based on that level's available information. For example, if a charge branch with a tree has no restrictions, but the user is NOT authorized for all the charges and branches within the branch, Standard Charge Lookup displays the branch, but does not display any additional information when the employee drills into it.
- **Advanced Charge Lookup** scans ahead to determine the necessity of displaying data. Exploring multiple levels in advance, Deltek Time examines whether any charges exist, with the number of levels configurable. If Deltek Time scans additional levels for charges underneath the branch but finds none, Deltek Time will not display the branch.



The Advanced Charge Lookup has two settings:

- **Levels Scanned:** Located on the Charge Lookup Options tab of the General Configuration screen, this drop-down list allows you to select the number of levels ahead Time & Expense with ESS should scan. The valid options are 1 to 10 and Infinity (all levels).
- **Show Unauthorized Branches:** This option is also located on the Charge Lookup Options tab of the General Configuration screen. Select this check box to display unauthorized branches if charges in those branches (or lower) are authorized. This setting does not allow employees to use unauthorized charges, it only allows them to see the branches necessary for navigating to charges for which they are authorized.

Improve Lookup Performance

If you use SQL Server and your charge tree structure is 'flat' (meaning, it contains three or fewer charge branch levels), select the **Flat Charge Tree Structure** check box on the Charge Lookup Options tab of the General Configuration screen to improve lookup performance.

While this setting normally improves performance for flat structures, it is recommended that you test whether your system performs better with this box selected or cleared.



You must log out and then log back on for the change to take effect.

Maintaining Charge Trees

Due to the vast number of charges, maintaining these charge trees can be a daunting task. Currently, there are two ways to maintain them: manually, through Deltek Time, or automatically, through the system interface. Unless you employ an outside system that contains such charging information, you will need to maintain it in Deltek Time. However, if most of the data resides in outside systems, you can still perform the bulk of the maintenance through the Deltek Time interface. The Deltek Time & Expense with ESS Technical Guide explains the format of charge tree imports.



A new, improved interface is available with Deltek Time 6 and later. With this improved interface, you can configure Deltek Time to automatically create contract and non-contract related charge trees.

Contract Related

You must first determine the origin of the particular charge tree before you. The valid options are:

- Division
- Type of Charge (Contract, B&P, IR&D, WIP)

Then you must select the top-level branches. The valid options are:

- Division
- Type of Charge (Contract, B&P, IR&D, WIP)
- Top Level of Contract (XXXX portion of Contract Number)

If the top level of contract is not the actual top-level branch, then next level will serve as the top-level branch. Below the top level, all tasks are listed. Contracts with a contract work force carry restrictions at the charge level for the appropriate employees.

Non-Contract Related

Non-contract related charges have the following structure:

- Tree — Division
 - Top Level Branch – Top Level of Account (XXXX portion)
-



If you are running Costpoint version 4 or later, you can create the following charge trees when using the Costpoint Export Data to Deltek Time and Expense application:

- Home Org
- Client
- Project Account Group
- Project Classification

If you are running Costpoint version 5 or later, you can create the following charge trees when using the Costpoint Export Data to Deltek Time and Expense application:

- Home Org
- Client
- Project Account Group
- Project Classification
- Company

You must first determine the charge tree's origin. The valid options are:

- Home Org
- Client
- Project Account Group
- Project Classification
- Company ID

Then you must select the top-level branches. The valid options are:

- Home Org
 - Client
 - Project Account Group
 - Project Classification
- OR
- Project (Top Level)

Project can be either the top-level or the second level of the hierarchy. You must decide whether the project structure should be extended below the top level. This option creates branches below the project level, depending on the project structure. If you do not select this option, all project charges for a specific top-level project are charges within the project's top-level branch.

Projects with a project work force carry restrictions at the charge level for the appropriate employees. You will have to manually create and maintain charge trees in Deltek Time for overhead, leave, and other non-project accounts.

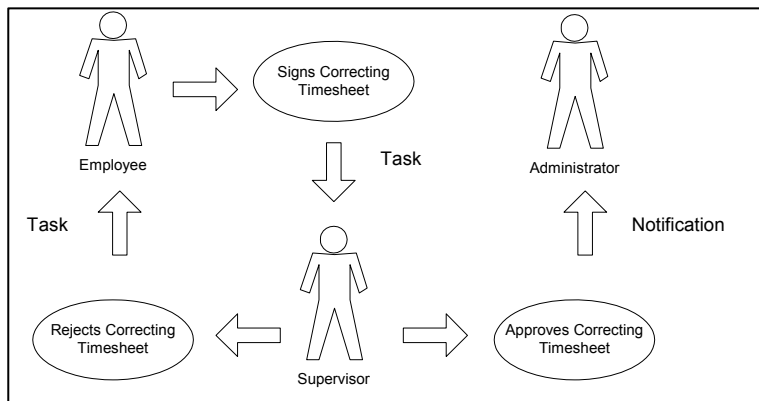
Charge Lookup Using Direct Costpoint Access

If you are using Deltek Costpoint, you can set up your system so that employees select charge codes for timesheets, expense authorizations, and expense reports directly from the current information in Costpoint, rather than from charge trees in Time & Expense with ESS. (If you are not using Costpoint, charges are always selected using Time & Expense with ESS charge trees.)

If you are using Costpoint, the primary advantage of selecting the **Direct Costpoint Access** option on the Charge Lookup Options tab of the General Configuration screen is that you do not have to import new charge tree information from Costpoint into Time & Expense with ESS before it can be used to enter timesheets or expense reports, a time-consuming process for large companies. With this option, as soon as you set up new charge-related information in Costpoint, it is available for data entry in Time & Expense with ESS. However, there are other factors to consider, so you should discuss this decision with your Deltek consultant.

Workflow

With Deltek Time's Workflow, you can define the activities or processes as they relate to timesheets and employees, the staff involved, and how and when information flows from person to person. With Workflow, information and transactions are automatically routed to each person in the process. Electronic inboxes replace physical ones.



Events

Events – meaning, actions by members of your organization that cause Deltek Time to initiate workflows -- lie at the center of Deltek Time's workflow feature. By definition, any particular event is comprised of an actor and an action. An actor is the functional role of the individual that performed the activity. An action is what the actor did that defined the event. You select the action and the actor in the Basic Information tab of the Events screen.

In version 5.0, you were limited to six actors: "System," "Employee," "Primary Supervisor," "Backup Supervisor," "Primary Administrator," and "Backup Administrator." With later versions, you can create additional actors by creating functional roles in the Functional Roles screen in the Users & Groups menu in Administration. The following is the current list of the valid actions that you can pair with your actors:

- Save Regular Timesheet
- Save Correcting Timesheet
- Sign Regular Timesheet
- Sign Correcting Timesheet
- Create Interim Charges
- Approve Regular Timesheet
- Approve Regular Timesheet with Warnings
- Approve Correcting Timesheet
- Approve Correcting Timesheet with Warnings
- Reject Regular Timesheet
- Reject Correcting Timesheet
- Reject Regular Timesheet Hours
- Reject Correcting Timesheet Hours
- Timesheet Failed Floor Check
- Timesheet Missing at Status Check
- Timesheet Open at Status Check

- Timesheet Signed at Status Check
 - Requested Leave
 - Cancelled Leave
 - Approve Leave Request
 - Reject Leave Request
 - Interim Timesheet Inquiry
 - Prior Beginning Balance Leave
-



The actions that are available depend on the actor you select.

Not all combinations of actors and actions are valid. For example, "Employee" and "Approve Regular Timesheet" is not a valid combination because employees cannot approve their own timesheets.

Employee Notifications

When you create an event with the actor/action combination, you must define the routing and notification rules in the Employee Notifications tab of the Events screen in the Settings menu of Deltek Time. The first set of notifications is sent to the owner of the item in the action (for example, the employee whose timesheet was rejected). These are called employee notifications. You can have up to three types of employee notifications, depending on the timesheet class and the event. These notifications include:

- Task — This type of notification creates a "To Do" item for the employee. For example, a task may be to "Sign Timesheet." Current tasks include:
 - Review Timesheet — The employee must review a specific timesheet.
 - Update Timesheet — The employee must update a specific timesheet.
 - Sign Timesheet — The employee must sign a specific timesheet.
- Alert — This type of notification sends a message to the employee.
- Email — This type of notification sends an email to the employee.

For each timesheet class, you can define different notification rules for each event, and send more than one notification. For example, you can send both an email and a task to an employee when Deltek Time runs a floor check that the employee fails.

Other Notifications

In the Other Notifications tab of the Events screen, you can configure Deltek Time to send notifications to other employees who perform designated functions.

Employee groups determine who performs these functions. Each group owner is assigned a functional role, such as primary supervisor or primary administrator.

You can define, by event, which other notifications occur for each of these functions. The type of notification is the same as for employees. You can have up to three types of notifications per function, depending on the event. These notifications include:

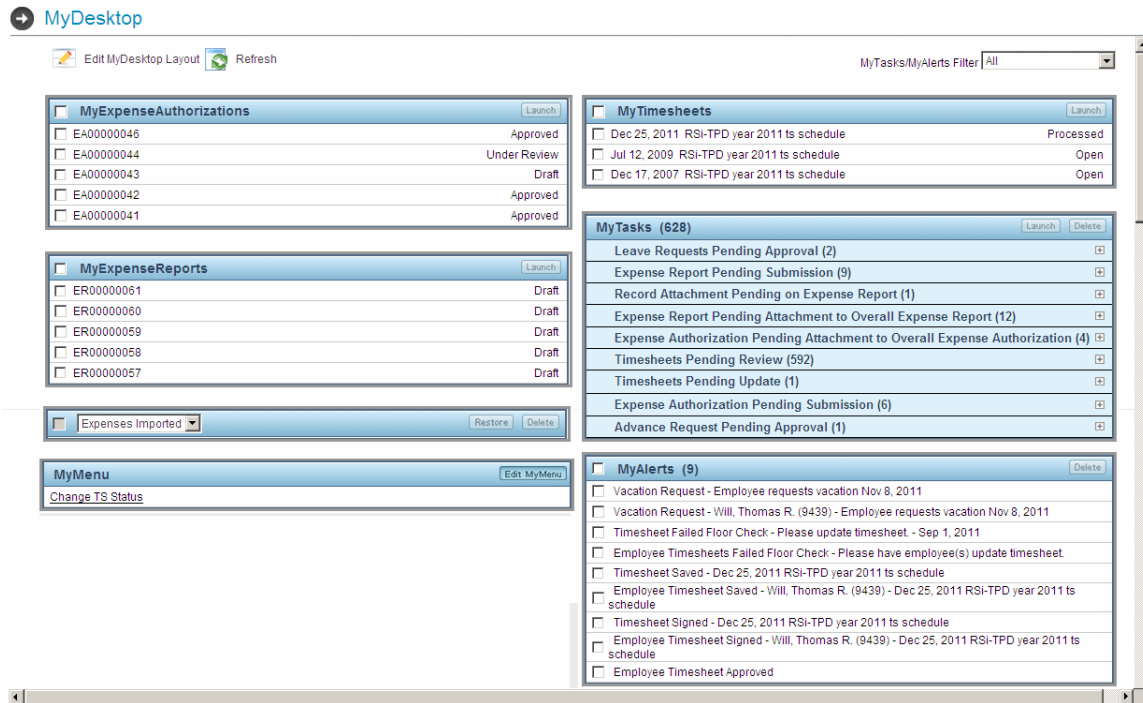
- Task — This type of notification creates a "To Do" item for the recipient. For example, a task may be to "Approve Timesheet." The following is the current list of the tasks.
 - Review Timesheet — The recipient must review a specific timesheet.

- Update Timesheet — The recipient must update a specific timesheet.
- Sign Timesheet — The recipient must sign a specific timesheet.
- Alert — This type of notification sends a message within Deltek Time.
- Email — This type of notification sends an email.

For example, when an employee signs a corrected timesheet, the primary supervisor can be assigned the task of approving it and the primary administrator can be notified by email of this occurrence.

MyDesktop

Your organizational members can use MyDesktop to perform their tasks, see their alerts, and quickly move to any location within Deltek Time.



The sections of the desktop are:

- **MyTasks** — This inbox displays the current workflow tasks that users must fulfill. After selecting which tasks they want to perform, they select **Launch** to display them. As an example, with three expense reports awaiting approval, a user can select all three expense reports and then select **Launch**. The expense report application opens, displaying the three selected expense reports.
- **MyAlerts** — In this inbox created by the workflow, users can read their alerts as well as delete them.
- **MyExpense Reports** — This section contains a list of the user's expense reports and their status. In the Preferences screen, the user can determine how many expense reports display. This option will display only if the user is licensed for Deltek Expense.
- **MyTimesheets** — This section contains a list of the user's timesheets and their status. In the Preferences screen, the user can determine how many timesheets display. This option will display only if the user is licensed for Deltek Time.
- **MyMenu** — Users can customize this personalized menu.
- **MyOutstandingExpenses** — This section contains a list of the user's outstanding expenses. As the user claims the expenses displayed in the expense report screen, they are deleted here. If any of these expenses are personal expenses and therefore NOT company-paid, the user can delete them here.
- **MyOutstandingAdvances** - This section contains a list of the user's outstanding advances. As the user claims 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.

3

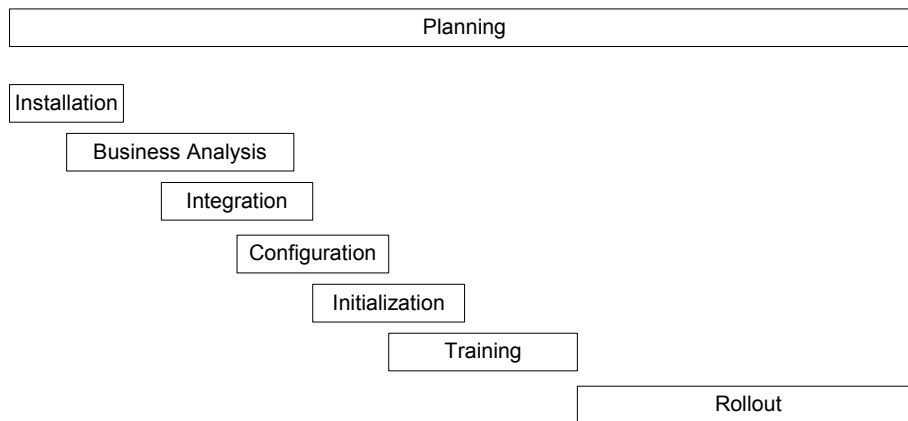
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Overview

Implementing a time collection system is different from implementing most other types of systems because the implementation directly affects the entire organization. Probably every employee will be required to use the system. The entering, signing, and approving of timesheets is a core business process. Labor may represent the largest expense and revenue source for an organization. Because of this visibility and scope, the implementation of an automated time collection system must be done correctly, on schedule, and with the least amount of disruption to the organization.

There are many ways to implement a software package. To give you some framework, we have identified the following implementation phases:



Although the implementation phases occur roughly in the above order, portions of them will reoccur throughout the implementation project, and the length of time required for implementing each phase can vary. The remainder of this section provides suggestions for each of the phases.

Planning

Planning can make or break a system implementation, especially one with the scope and reach of a time collection system. Some of the factors that affect a time collection implementation include organizational factors and personnel factors.

Organizational Factors

- Single vs. Multiple Locations — Multiple locations affect such things as user access, user training, and system rollout.
- Centralized vs. Decentralized — Decentralized organizations usually require more administrators who spent less time in the system. This affects the training and rollout phases.
- Commercial vs. Government — The business rules can differ drastically between these two sectors. Knowledge of your sector(s) and how it affects time collection is key.
- Service vs. Product — Labor reporting requirements for service companies tend to be more elaborate.

Personnel Factors

- White Collar vs. Blue Collar — The degree of employees' familiarity with and access to computers can drastically change the training and rollout phases.
- Computer Access vs. No Computer Access — Lack of computer access may require you to train more administrators or supervisors to enter timesheets on the behalf of the employees.
- Fixed Location vs. Varying Location — Employees that change location affect how the system is implemented on your network.
- Full-time vs. Part-time — A training program is particularly important if you have a lot of part-time employees that are cyclical.

Create an Implementation Team

It is important to assemble an implementation team right from the beginning. We recommend that the implementation team consist of the following:

- One or more members from the accounting and payroll staff who clearly understand the policies and procedures of your current time collection process. They should understand how labor transactions work in both your accounting and payroll systems.
- A member of your management staff who can clarify your goals and requirements from a management perspective.
- One or more members of your IT staff who are familiar with your organization's hardware and network.

After you have identified your implementation team, it is important to identify one individual as the implementation manager. This person should be someone who will be involved on the project on a daily basis.



We highly recommend using a Deltek Time consultant. Consultants do not eliminate the need for an implementation team, but they are an extremely valuable resource and can make the implementation smoother and more efficient.

Prepare Background Information

One of the first things you must do in the planning phase is identify end-users and gather the following facts about your organization. This will assist the Deltek consultant in developing an implementation plan.

- Location — Compile a list of employees by location. This will affect the rollout plans.
- Type (Employee, Supervisor, etc.) — Identify the types of users. A rough count of each type is useful.
- Language — Determine whether you need to support multiple languages and, if so, how they are distributed within locations. This will affect the rollout plans.
- Network Access — Identify the type of access that users require. This will be LAN, WAN, intranet, Internet, dial-in, etc.
- Hardware — Establish profiles of the common hardware that end-users have. Make a note of any organizational standards, such as OS and browser.
- Desired Live Date — Determine the date by which you want the system to be live. You can work backwards from this date to plan the milestones. This 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 let the Deltek consultant get to know your organization. A sample list of what you need to discuss follows:

- Set dates and agendas for future consulting visits.
- Discuss the organization's financial/payroll systems, their data requirements, and how they relate to Deltek Time.
- Prioritize goals for implementation
- Discuss current time collection policies.
- Clarify the concepts.
- Discuss status of hardware/software installation.



We recommend that all members of your implementation team read this [Getting Started Guide](#). In addition, you probably want to discuss concepts before this meeting.

After the meeting, team members should have a general understanding of the implementation, and they should have a plan in place for the next phase.

Installation

This section contains a few notes regarding hardware and software installation. It is discussed in detail in your Installation Guide. The software runs on the following hardware:

- Database Server
- Application Server
- Web Server
- Report Server

These four servers can run on one computer or three. Depending on its size, your organization may require more than one application and/or web server.

The required software is listed below:

- Supported RDBS — For the Database Server
- BEA Weblogic® and Deltek Time software — For the Application Server
- Supported Web Server software and Deltek Time 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, the team will analyze the current timesheet process, refine the implementation goals, and decide how to configure and use the system. This is where the expertise of the Deltek Consultant can assist the most. The list below tells you which areas require business analysis and lists the questions the team should ask.

Data Requirements

- Which data must be captured?
- What are the attributes of the captured data?
- Where does this data fit into the UDT structure?
- Does employee type determine what displays on the timesheet?

Interfaces

- Which interfaces are needed?
- What will be the method of interface?
- What will be the frequency of interfaces?

Labor Policies

- What are your overtime policies?
- What are your leave policies?
- What are your uncompensated overtime policies?
- What are your policies on total time recording?

Timesheet Policies

- What are your timesheet periods?
- How does your approval process work?
- How are timesheet corrections done?
- Do you require charge authorizations?
- How do you want charge trees structured?

Organization

- What type of employees do you have?
- What timesheet classes do you need?
- What employee groups do you need?
- How is your organization structure represented?

Reporting

- What are your reporting requirements?
- Do you want to apply security to the contents of reports?

Integration

During Integration, you may interface Deltek Time with outside financial and/or payroll systems. If so, you must set up and configure the interfacing criteria in order to get data into the system. That is why it is one of the first items discussed during the business analysis. You should determine the following:

- Which data needs to be interfaced?
- Where does the data come from?
- In what format is the data? (ASCII, Table, XML, or JMS)
- How often will the data be interfaced?
- Is the method of data interfacing transactional or batch?

The interface must be operational as soon as possible because it will be difficult to complete the initialization phase without the initialization data.



The Deltek Time & Expense with ESS Technical Guide has a detailed overview of the interfacing options in the product.



Previous versions of Deltek Time and GCS Premier used batch-based ASCII files as the default interface. With version 6.0 and higher of Deltek Time, GCS Premier used XML layouts as the default interface. See the “Import ASCII Layouts” and “Import XML Schemas” chapters in the Deltek Time & Expense with ESS Technical Guide to find ASCII and XML layouts.



Currently, Costpoint uses batch-based ASCII files as the default interface. Please see appropriate Costpoint documentation to find out more about the existing interface in Costpoint and the Deltek Time & Expense with ESS Technical Guide to find out more about the interface configuration in Deltek Time.

Configuration

During the Configuration phase, you will set up the system to support your business requirements. For the most part, this means setting up certain screens in Deltek Time. The remaining part of this section is a step-by-step checklist. For details about any specific application, consult the online help and relevant sections in the “Concepts” chapter of this guide.

□ Step 1 — Log in to System

To log in to a brand-new system in which no information is set up, enter the following information:

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

The system will require you to change the password. The password must be at least eight characters long and include at least one number and at least one special character.



Please write down the changed password because you cannot retrieve it from the system.

□ Step 2 — General Configuration (Administration » Product Configuration)

In this step, you configure most of the global settings that the system uses. You should exercise extreme care in configuring this screen, because it may be impossible to change some of the settings. You should be configuring the following settings at this point:

- Password Options
- Server Time Zone
- Row Settings
- UDT Settings
- UDT Linking Settings
- UDT Abbreviation Settings
- User-Defined Field Labels
- Miscellaneous Options
- Charge Lookup Options
- For each additional language, set the following values:
 - UDT labels
 - User-defined field labels

You will configure the default options in a later stage.



Existing Deltek Expense users will already have most of this screen configured. However you may need to make changes or additions to the UDT Settings to match your timesheet requirements.

❑ 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 — Time Configuration (Time » Settings)



For Deltek Mobile Time configuration instructions, see Appendix C: Configure Deltek Mobile time.

In this step, you configure most of the time settings that the system uses. You should exercise extreme care in configuring this screen, because it may be impossible to change some of the settings. At this point, you should be configuring the following settings:

- Define UDTs options
- Set the following values for each additional language:
 - Signature Text
 - Approval Text
- Configure Export Options
 - Decide which of the UDTs you are going to export
 - Select your Labor Distribution interface (if required)
 - Select your Payroll interface (if required)
- Configure Miscellaneous Options
 - Charge Description Defaults
 - User-Defined Rate Settings
 - Miscellaneous Settings
- Configure Mobile Time Default Options
 - Timesheet View
 - Timesheet Line Sort



For information on installing and configuring Deltek Mobile Time, see “Configure Deltek Mobile” in the Appendix of this guide.

For information on using Deltek Mobile Time, see the Deltek Mobile Time online help, available from your handheld device, or also see the Deltek Mobile Time Quick Reference Cards, which are available from the following locations:

- The software download site, when you download the application
- The Deltek Customer Care Connect site at <http://support.deltek.com>

You will configure the default options in a later stage.

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

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

□ Step 6 — Utilizations (Time » Settings)

In this step, you create utilization categories for which labor hours will be accumulated and reported in the Utilization Inquiry/Report. The following are examples of utilization categories:

- Direct
- Indirect
- Leave



Existing Time Collection 4.1 clients can migrate this data, if desired. Please talk to your Deltek consultant for data conversion options.

□ Step 7 — UDT01 Types (Administration/Product Configuration)

In this step, you create the UDT01 types to which UDT01s will be assigned.



Existing Time Collection 4.1 clients can migrate this data if desired. Please talk to your Deltek consultant for data conversion options.



UDT01 types are account types for typical GCS Premier implementations. The standard account types are as follows:

- "B" — Liability (Accrued Leave)
 - "C" — Contract
 - "L" — Indirect Labor
 - "P" — Bid & Proposal
 - "R" — IR& D
 - "W" — Work in Process
-



UDT01 types are account types for typical Costpoint implementations. In Deltek Costpoint, you must enter a value in the *Time Collection Account Type* field for each account that will be downloaded into Deltek Time. This field is non-validated, and there is no limit to the number of account types that you can configure. Common account types are as follows:

- "DL" — Direct Labor
 - "IL" — Indirect Labor
 - "L" — Leave
-

□ Step 8 — Employee Group Types (Administration » Product Configuration)

In this step, you create the valid group types for the system.



Currently you can download groups based on organization, supervisor, and/or manager. You may need to create the following group types:

- "GCSDIV" — Division
- "GCSDEPT" — Department
- "GCSOBS" — OBS
- "GCSPVSR" — Supervisor
- "GCSLOC" — Locator Code
- "GCSLOC1" — Locator Code 1
- "GCSLOC2" — Locator Code 2
- "GCSLOC3" — Locator Code 3
- "GCSLOC4" — Locator Code 4
- "GCSLOC5" — Locator Code 5
- "GCSSFY" — Default Suffix
- "GCSLABCAT" — Labor Category

Add only the group types that are configured in GCS Premier to be exported.



Currently, you can download groups based on organization, supervisor, and/or manager. You may need to create the following group types:

- "DELTEKS" — Supervisor
- "DELTEKO#" — Organization, where # indicates level number. Thus, if you have a three-level organization, you will need the following group types: "DELTEKO1," "DELTEKO2," and "DELTEKO3."
- "DELTEKM" — Manager
- "DELTEKC" — Company

Add only the group types that are configured in Costpoint to be exported.

□ Step 9 — Security Roles (Administration » Users & Groups)

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

- EMPL — Employee
- SUPER — Supervisor
- ADMIN — Administrator



You do not necessarily need different roles for Deltek Time and Deltek Expense. For example, if a role is granted access to the Timesheet screen and that user does not have a license for Deltek Time, the screen will not show. Existing Time Collection 4.1 clients can migrate this data if desired. Please talk to your Deltek consultant for data conversion options.

❑ Step 10 — 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
- PM — Project Manager
- VP — Division Manager



The system 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 find it necessary to review and adjust the rights and permissions.

❑ Step 11 — Company Work Schedules (Time/Settings)

In this step, you create company-wide work schedules. These schedules will later be used as a template for the employee work schedules, where schedule overrides can occur. It is common to have a "Full Time" and a "Part Time" schedule. You will need additional schedules only if you require different holidays.



Existing Time Collection 4.1 clients can migrate this data if desired. Please talk to your Deltek consultant for data conversion options.

❑ Step 12 — Timesheet Schedules (Time » Settings)

In this step, you create the Timesheet Schedules. Use this screen to:

- Create timesheet schedules.
- Define the current period.
- Set open/close statuses for all periods.



Existing Time Collection 4.1 clients can migrate this data if desired. Please talk to your Deltek consultant for data conversion options.

❑ Step 13 — Leave Types (Time » Settings)

In this step, you create the leave type codes required by the system. Leave types control how leave is identified. In this step, you need to do the following:

- Create leave types.
- Create mappings.
 - Will be based on configuration settings.

- Will be done later during the Initialization phase (see Step 8 in the "Initialization" section).



Currently, you cannot use the GCS Premier interface to download Leave Types, although this capability will be offered in the future. The employee leave balances downloaded from GCS Premier assume that the leave types are already set up. The leave type codes are based on the Short Description used in GCS Premier.



Leave types are part of the download process from Costpoint.

□ Step 14 — Events (Time » Settings)

In this step, you create all the events for which you wish the system to generate workflow.



You cannot configure Employee Notifications at this time; you will do that when you configure the Employee Classes. However, you can configure Other Notifications.

□ Step 15 — Timesheet Classes (Time » Settings)

In this step, you create Timesheet Classes to which employees will be assigned. You must provide the following information:

- Create required timesheet classes.
- Set general and regular hour and overtime rules.
- You will set the UDT10 restrictions later in the Initialization phase. See Step 9 in the "Initialization" section.
- Define leave rules.
- Use the Events screen to define employee notification rules for events.



Existing Time Collection 4.1 clients can migrate this data if desired. Please talk to your Deltek consultant for data conversion options.

□ Step 16 — General Configuration (Administration » Product Configuration)

Now that you have configured some dependent screens, you must return to the General Configuration screen to complete the configuration for the following items:

- Default Account Type
- Default Security Role
- Default Currency

❑ Step 17 — Time Configuration (Time » Settings)

You must return to the Time Configuration screen to complete the configuration of the following items:

- Default Timesheet Schedule
- Default Work Schedule
- Default Timesheet Class

❑ Step 18 — Add Administrator Login (Administration » Users & Groups » Employee Information)

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

- Add "ADMIN" employee.
 - Grant password.
 - Assign employee to a security role that has access to the entire system.
 - Grant the user access to Deltek Time (Transaction License preferred).
 - Select a Security Role in the Defaults tab.



You must remember the login ID and government ID because you cannot retrieve them from the system.

❑ Step 19 — Log out

- Log out of the system.

❑ Step 20 — Test Login

- Test the login you just created. The valid login information is as follows:
 - Login ID:0 The login ID you just created.
 - Password: The government ID you just assigned.
 - Domain: The name you assigned during installation.

❑ Step 21 — Delete Install Login (Administration » Users & Groups » Employee Information)

- Delete Install employee.



It is important that you delete this employee. This employee's continued presence represents a security weakness.

We recommend that you back up the database at this time.

Initialization

During the initialization phase, you will populate the configured system. You will populate most of the data through the interface while entering the rest manually. What you import through the interface and what you enter will vary from implementation to implementation. The remaining part of this section is a step-by-step checklist. For details about any specific application, consult the online help and relevant sections in the “Concepts” chapter of this guide.

❑ Step 1 — Configure Import

Before you initialize the tables with data, you must configure the following import options on your Weblogic Console:

- On your Weblogic Console, go to DeltekTE/Domains. Click on the domain that you are using. Login with the Database ID & PW
 - Define Export, Import & Trash locations.
 - Please note that if you are using Workflow, this screen is where you will configure your E-mail settings.

❑ Step 2 — Extract data from source systems

- Extract data from your source financial/payroll systems.



[See Appendix B at the end of this guide.](#)



[See Appendix A at the end of this guide.](#)

❑ Step 3 — Initial Import (Administration » Process » Import Console)

- Execute an on-demand import.
- Review and correct any errors.
- Adjust interface or configuration on your Weblogic Console, if appropriate.
- Defer configuring scheduled import to a later date.

❑ Step 4 — Scheduled Import (Administration » Process » Import Console)

- Set up scheduled import options, if needed.

□ Step 5 — Employee Groups (Administration » Users & Groups)

- If you imported employee groups:
 - Add additional groups as needed.
 - Add additional supervisors/administrators, if needed.
 - Add/delete employees, if needed.
 - Assign charge trees, if appropriate.

□ Step 6 — Manually enter UDTs (Administration » Master Data)

- Add UDT values where needed.



- UDT01: The following account types will automatically be downloaded: "C," "P," "R," "W," and "L," along with any leave accrual/expense.
 - UDT02: Automatically downloaded.
 - UDT03: Automatically downloaded.
 - UDT04: Automatically downloaded, if configured for it.
 - UDT05: Automatically downloaded, if configured for it.
 - UDT06: Not used.
 - UDT07: Automatically downloaded.
 - UDT08: Automatically downloaded, if configured for it.
 - UDT09: Automatically downloaded, if configured for it.
 - UDT10: Automatically downloaded, if configured for it.
 - UDT11: Not used.
 - UDT12: Not used.
 - UDT13: Not used.
 - UDT14: Not used.
 - UDT15: Not used.
-



- UDT01: Automatically downloaded based on the Deltek Time\Expense\Self Service Account Type.
 - UDT02: Automatically downloaded if checkbox is selected in the Project Master screen.
 - UDT03: Automatically downloaded, if configured for it.
 - UDT04: Automatically downloaded, if configured for it.
 - UDT05: Automatically downloaded, if configured for it.
 - UDT06: Automatically downloaded, if configured for it.
 - UDT07: Automatically downloaded.
 - UDT08: Automatically downloaded, if configured for it.
 - UDT09: Automatically downloaded, if configured for it.
 - UDT10: Automatically downloaded, if configured for it.
 - UDT11: Manually add if using multi-state payroll.
 - UDT12: Not used.
 - UDT13: Not used.
 - UDT14: Not used.
 - UDT15: Not used.
-

□ Step 7 — Charge Trees (Administration » Master Data)

- If you imported charge trees:
 - Add additional charge trees as needed.
 - Assign employee groups restrictions, if appropriate.
 - Assign employee restrictions, if appropriate.
- If you did not import charge trees:
 - Add trees as needed.
 - Trees
 - Branches
 - Charges
 - Employee Group Restrictions
 - Employee Restrictions



You can create the following charge trees when using the GCS Download to Time Collection interface application:

Direct

- Division
- Contract Type

You must first determine from where the Charge Tree comes. Select from the following valid options:

- Division
- Contract Type

Then you must select the top-level branches from the following valid options:

- Division
- Contract Type or
- Contract (Top Level)

If contract is not the top-level branch, it will be the next level.

Indirect

Indirect Accounts are currently hard coded as follows:

- Charge Tree — Division
- Top-level Branch — Account Top Level



If you want to organize your indirect accounts differently, you can configure GCS Premier not to create charge trees by account and manually add them into Deltek Time.



If you are running Costpoint version 4 or greater, you can create the following charge trees when using the Costpoint Export Data to Deltek Time and Expense application:

- Home Org
- Client
- Project Account Group
- Project Classification

If you are running Costpoint version 5 or greater, you can create the following charge trees when using the Costpoint Export Data to Deltek Time and Expense application:

- Home Org
- Client
- Project Account Group
- Project Classification
- Company ID

You must first determine from where the Charge Tree comes. Select from the following valid options:

- Home Org
- Client
- Project Account Group
- Project Classification
- Company ID

Then you must select the top-level branches from the following valid options:

- Home Org
- Client
- Project Account Group
- Project Classification
-
- OR
- Project (Top Level)

If project is not the top-level branch, it will be the next level. You must decide whether the project structure should be extended below the top level. If you select this option, branches below the project level will exist based on the project structure. If you do not select this option, all project charges for a specific top-level project will be charges within the project's top-level branch.

If you do not use indirect projects, you will need to add your indirect charges manually within Deltek Expense.

□ Step 8 — Link UDT values to Leave Types (Time » Settings » Leave Types)

- Link the UDT values that indicate leave taken or banked for each of the leave types.

□ Step 9 — Link UDT10 values to Timesheet Classes (Time » Settings » Timesheet Classes)

- Link the valid UDT10s to each of the timesheet classes.

□ Step 10 — Grant Employee Access (Administration » Users & Groups » Employee Information)

Give employees access to the system and set their default security roles.



If an employee already has a password and a role, you need only to grant the employee a license.

While granting employees access, you can also specify pay method overrides for certain pay methods such as advances.

Remember that each employee granted a license counts toward your total of purchased licenses.

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

Training

Training materials are important because processing timesheets is such an important business process. You will use your materials long after the system rollout, whenever you process new hires.

Manuals

The training materials usually consist of employee, supervisor, and administrator manuals. Deltek consultants can help create both, but creating and maintaining these manuals should be part of your company's procedures. The manuals usually contain the following:

- User interface basics
- Documentation on the applications/screens (based on rights)
- Company policies and procedures as they relate to Deltek Time

Employee manuals usually contain only documentation for the timesheet and desktop applications. Supervisor manuals are the same as employee manuals, but with more information on the approval/rejection of timesheets. Administrator's manuals often contain procedural checklists, as described below.

Procedural Checklists

A procedural checklist is extremely helpful for administrators. This checklist usually revolves around a schedule or a task. For example, you could have daily checklists and weekly checklists, and checklists for new hires and terminations. Examples of such checklists are as follows:

- New Hire Checklist
- Exporting Timesheet Checklist
- Daily Floor Check Checklist

Quick Reference Guide

Quick Reference Guides are pamphlets that provide users with a quick help about logging into the system, and entering, signing, and approving timesheets.

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.

Deltek Mobile Time, an add-on module, contains its own online help that is available when you access the application from the handheld device.

Training Classes

We highly recommend that you conduct formal training classes or orientations. These training classes usually range from 15 to 30 minutes for employees and supervisors, to a couple of hours for administrators.



Training classes should be hands-on, if possible. You can 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, conduct your training just before users begin using the system. Training should recur throughout the rollout schedule as new employees are introduced to the system.

Rollout

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

- Define pilot group.
- Train pilot group.
- Test pilot group.
- Evaluate pilot.
- Train production group.
- Roll out production group.

The rollout starts with the definition, training, and testing of a pilot group. The pilot gives the system an important real-life test. At the end of the pilot, you evaluate the results and, if necessary, make adjustments to the system's configuration. After a successful pilot, you start a rollout to the organization.

Pilot Recommendations

As mentioned above, the pilot test validates the system's configuration and gives you live experience with the system. Here are some hints on making your pilot successful.

- The pilot group should be between 25 and 100 users.
- The users should include a mix of direct and indirect employees.
- The users should have varying access: WAN, LAN, Internet, etc.
- The pilot group should be close to "home." These users should be physically located near the implementation team.
- The pilot period should last one or two timesheet periods.
- During this period, the employees enter timesheets and print them for legacy system or dual maintenance.
- The pilot test should include exporting and loading timesheet data into financial and payroll systems.
- Begin training your users during the first week of the pilot.

Rollout Recommendations

During rollout, you deploy the system and go into production. The rollout can be phased or not phased. We highly recommend phased rollouts because the implementation of an organizational-wide system can be overwhelming.

- **Timing** — Plan rollouts so that they start or complete on a particular date of accounting significance. This is usually a calendar date such as a month end, or the end of an accounting year.
- **Size** — The size of the rollout depends on the training resources and how much training you can get done during the first couple days of a timesheet period. For example, if your weekly timesheets start on Monday, you could train employees Monday and Tuesday. The upper limit of the rollout depends on how many employees you can train each week. Rollouts typically range from 100 to 500 employees.

Rollout

- **Frequency** — The rollout phases should conform to your timesheet schedule. If you have weekly timesheets, your phases will be weekly.
- **Data Completeness** — Because some of your employees will still be doing manual timesheets, it is important to have a complete set of source documents and data. There are two ways to handle this issue:
 - Require employees to print timesheets and submit paper timesheets during rollout.
 - Enter manual timesheets into system and have employees sign off on those timesheets later.

Solution 1 keeps a paper copy of all timesheets, but the database has timesheet data for part of the organization. For auditing purposes, the paper timesheets are the source documents, although you probably will export the timesheets instead of entering them again. Solution 2 still relies on the paper timesheets temporarily for auditin

Appendices

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Appendix A — Costpoint Interface

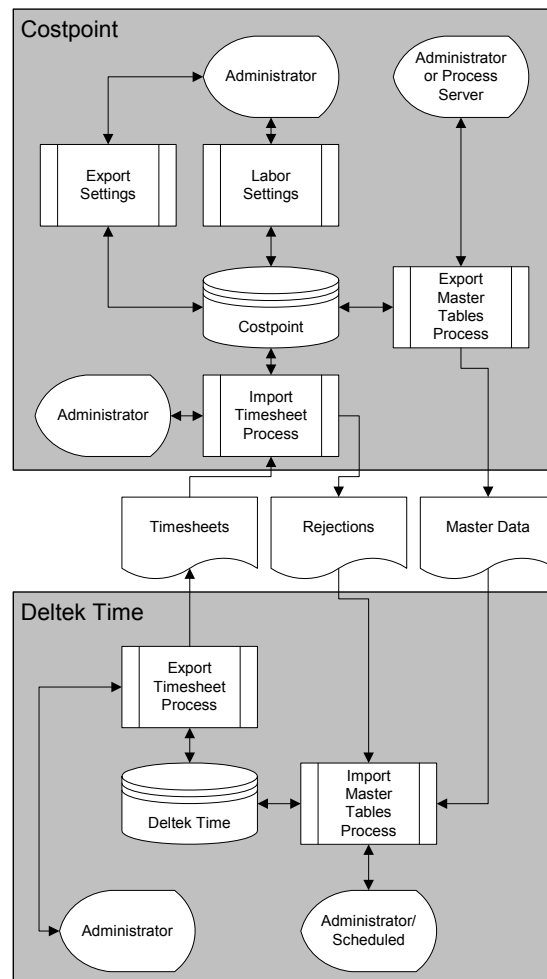
The interface between Costpoint and Deltek Time transfers master data from Costpoint to Deltek Time and transfers timesheet data from Deltek Time to Costpoint. The diagram to the right gives an overview of the processes involved.

You can use certain Costpoint screens to configure the interface. The export process uses your configuration to extract the "master data" and save it in the form of ASCII files for pickup by Deltek Time. You can perform this extraction on demand or schedule it via the process server.

Within Deltek Time, you can execute the import process on demand or schedule it. This import process picks up the exported data and updates Deltek Time's database.

You export timesheets on demand. Once timesheets are approved, an administrator can select the timesheets for export. This export process creates an ASCII file containing the timesheet data. (If you have Costpoint 5.1 or a later version, you have the option to export unsigned or unapproved ("in process") timesheets.)

Costpoint's timesheet import process validates and updates the Costpoint database with the timesheet data. If any rejections occur, the system creates an ASCII file containing the rejections. It processes the file in the same way as the "master data," updates the appropriate timesheets and notifies users to correct timesheets.



You can find detailed documentation on the Costpoint portion of the interface in the appropriate Costpoint manuals. Important sections include: [Configure Labor Settings](#), [Manage Employee Salary Information](#), [Manage Accounts](#), [Manage Project User Flow](#), and [Import Timesheets from Deltek Time and Expense](#). See the [Deltek Time/Costpoint Interface](#) documentation for more information.

You can also find detailed documentation on the Deltek Time portion of the interface in the [Deltek Time & Expense with ESS Technical Guide](#).

Costpoint Screens

You will use several screens within Deltek Costpoint for the interface with Deltek Time\Expense\Self Service. The table below itemizes these screens and provides notes about their use.

Screen	Location	Notes
Configure Labor Settings	People/Labor/Labor Controls	Use this screen to configure the version of Deltek Time\Expense\Self Service with which Costpoint must interface.
Manage Deltek Time and Expense Account Types	People/Labor/Deltek Time and Expense Interface	Use this screen to define the master list of Deltek Time\Expense\Self Service account types. These codes MUST be same as the ones defined in Deltek Workforce.
Manage Deltek Time and Expense Accounts	People/Labor/Deltek Time and Expense Interface	You can use this utility to assign Deltek Time\Expense\Self Service account types to the accounts you wish to download.
Manage Deltek Time and Expense Projects	People/Labor/Deltek Time and Expense Interface	You can use this utility to indicate whether project(s) are for Deltek Time, Deltek Expense, Both, or Neither.
Manage Employee Salary Information	People/Employee/Basic Employee Information	Use this screen to assign employees to timesheet classes and work schedules.
Export Data to Deltek Time & Expense	People/Labor/Deltek Time and Expense Interface	Use this screen to extract data from Deltek Costpoint.
Manage Accounts	Accounting/General Ledger/Accounts	Instead of using the utility to mass assign Deltek Time\Expense\Self Service account types, you can do it one account at a time via this screen.
Manage Project User Flow	Projects/Project Setup/Project Master	Instead of using the utility to mass indicate whether a project is for Deltek Time, Deltek Expense, Both, or Neither, you can do it one project at a time via this screen.
Import Timesheets from Deltek Time and Expense	People/Labor/Deltek Time and Expense Interface	Use this screen to import timesheets that were exported from Deltek Time.

Appendix B — GCS Premier/System 1 Interface

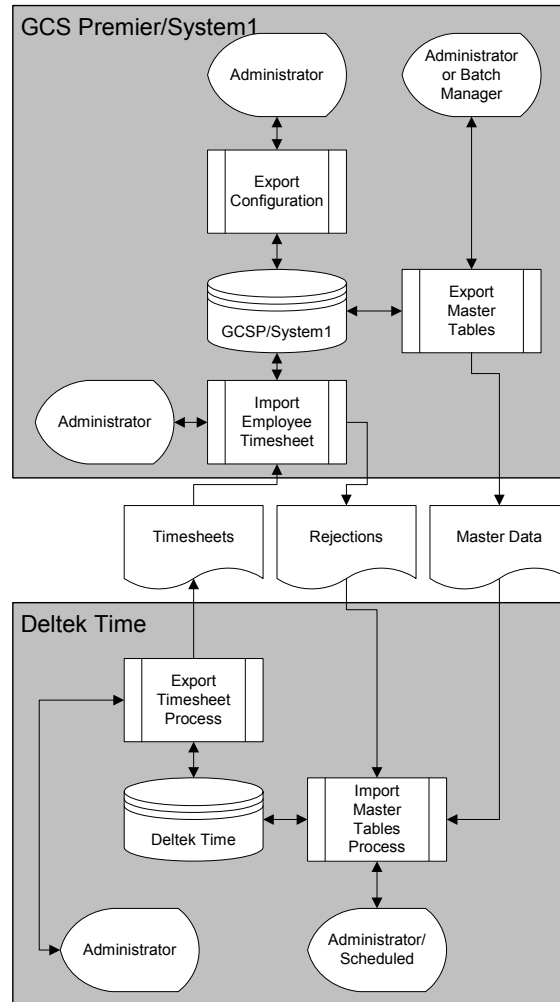
The interface between GCS Premier/System1 and Deltek Time transfers master data from GCS Premier/System1 to Deltek Time and transfers timesheet data from Deltek Time to GCS Premier/System1. The diagram to the right gives an overview of the processes involved in this interface.

You can use the Export Configuration screen in the ET * Time Collection tab in System Interfaces in GCS Premier/System1 to configure the export. The export process uses your configuration to extract the "master data" and save it in the form of ASCII files for pickup by Deltek Time. You can perform this extraction on demand or schedule it via the batch manager.

Within Deltek Time, you can execute the import process on demand or schedule it. This import process picks up the exported data and updates Deltek Time's database.

You export timesheets on demand. Once timesheets are approved, an administrator can select the timesheets for export. This export process creates an ASCII or XML layout file containing the timesheet data.

The GCS Premier/System1 timesheet import process validates and updates the GCS Premier/System1 database with the timesheet data. If any rejections occur, the system creates an ASCII or XML layout file containing the rejections. It processes the file in the same way as the "master data," updates the appropriate timesheets, and notifies users to correct timesheets.

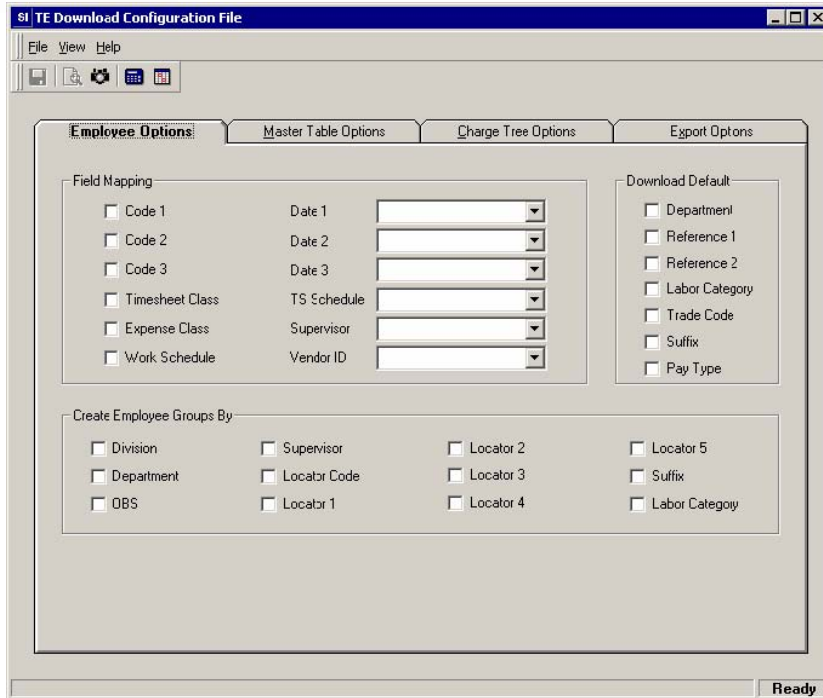


You can find detailed documentation on the GCS Premier/System1 portion of the interface in the appropriate GCS Premier/System1 manuals. Important sections include Export Configuration and Import Employee Timesheets.

You can also find detailed documentation on the Deltek Time portion of the interface in the Deltek Time & Expense with ESS Technical Guide.

TE Download Configuration File

Use this screen to control which data you download to Deltek Time. Normally, you will never change the settings in this screen unless you are changing how you want to use Deltek Time. The table below breaks out the options and classifies them as Deltek Time or Deltek Expense options.



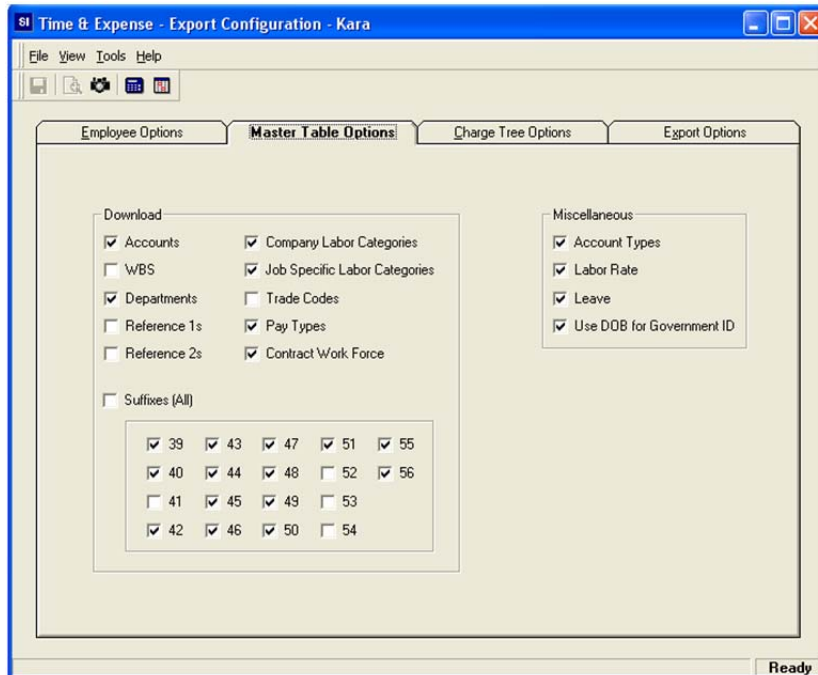
Setting	Notes	Type
Field Mapping - Code 1	This setting indicates whether the user-defined <i>Code 1</i> field in the Employee Time and Expense screen will be downloaded to the first user-defined field in Deltek Time\Expense\Self Service.	Time & Expense
Field Mapping - Code 2	This setting indicates whether the user-defined <i>Code 2</i> field in the Employee Time and Expense screen will be downloaded to the second user-defined field Deltek Time\Expense\Self Service.	Time & Expense
Field Mapping - Code 3	This setting indicates whether the user-defined <i>Code 3</i> field in the Employee Time and Expense screen will be downloaded to the third user-defined field in Deltek Time\Expense\Self Service.	Time & Expense
Field Mapping - Timesheet Class	This setting indicates whether the <i>TS Class</i> field in the Employee Time and Expense screen will be downloaded to Deltek Time\Expense\Self Service. If this checkbox is not selected, the system will download blanks and Deltek Time\Expense\Self Service will use the default as configured.	Time

Setting	Notes	Type
Field Mapping - Expense Class	<p>This setting indicates whether the <i>Expense Class</i> field in the Employee Time and Expense screen will be downloaded to Deltek Time\Expense\Self Service.</p> <p>If this checkbox is not selected, the system will download blanks and Deltek Time\Expense\Self Service will use the default as configured.</p>	Expense
Field Mapping - Work Schedule	<p>This setting indicates whether the <i>Work Schedule</i> field in the Employee Time and Expense screen will be downloaded to Deltek Time\Expense\Self Service.</p> <p>If this checkbox is not selected, the system will download blanks and Deltek Time\Expense\Self Service will use the default as configured.</p>	Time
Field Mapping - Date 1	<p>This setting controls the value downloaded to the first user-defined date field in the Deltek Time\Expense\Self Service employee master file. The valid values are as follows:</p> <ul style="list-style-type: none"> ▪ Blank ▪ Birth Date ▪ Adjusted Hire Date ▪ Last Review ▪ Next Review ▪ Termination Date ▪ Seniority Date ▪ TE Date* <p>* From the Employee Time and Expense screen.</p>	Time & Expense

Setting	Notes	Type
Field Mapping - Date 2	<p>This setting controls the value downloaded to the second <i>User-Defined Date</i> field in the Deltek Time\Expense\Self Service employee master file. The valid values are as follows:</p> <ul style="list-style-type: none"> Blank Birth Date Adjusted Hire Date Last Review Next Review Termination Date Seniority Date TE Date* <p>* From the Employee Time and Expense screen.</p>	Time & Expense
Field Mapping - Date 3	<p>This setting controls the value downloaded to the third user-defined date field in the Deltek Time\Expense\Self Service employee master file. The valid values are as follows:</p> <ul style="list-style-type: none"> Blank Birth Date Adjusted Hire Date Last Review Next Review Termination Date Seniority Date TE Date* <p>* From the Employee Time and Expense screen.</p>	Time & Expense

Setting	Notes	Type
Field Mapping - TS Schedule	<p>This setting controls the value downloaded to the employee's timesheet schedule in the Deltek Time\Expense\Self Service employee history file. The valid values are as follows:</p> <ul style="list-style-type: none"> Blank Pay Frequency TE TS Schedule* <p>* From the Employee Time and Expense screen.</p>	Time
Field Mapping - Supervisor	<p>This setting controls where GCS Premier gets the employee's primary supervisor if employee groups are created by supervisor.</p> <ul style="list-style-type: none"> Blank Supervisor (Non Validated) TE Supervisor* <p>* From the Employee Time and Expense screen (Validated).</p>	Time & Expense
Field Mapping - Vendor ID	<p>This setting controls where GCS Premier gets the employee vendor ID.</p> <ul style="list-style-type: none"> Blank Empl ID (Same as) TE Vendor ID* <p>* From the Employee Time and Expense Screen (Validated).</p>	Expense
Download Default	<p>These settings control whether a default value is downloaded for each employee for each of the following:</p> <ul style="list-style-type: none"> Department Reference 1 Reference 2 Labor Category Trade Code Suffix Pay Type 	Time & Expense

Setting	Notes	Type
Create Employee Groups By	<p>These settings control whether employee groups are created and downloaded based on the following data in GCS Premier.</p> <ul style="list-style-type: none"> Division Department OBS Supervisor Locator Code Locator 1 - 5 Suffix Labor Category 	Time

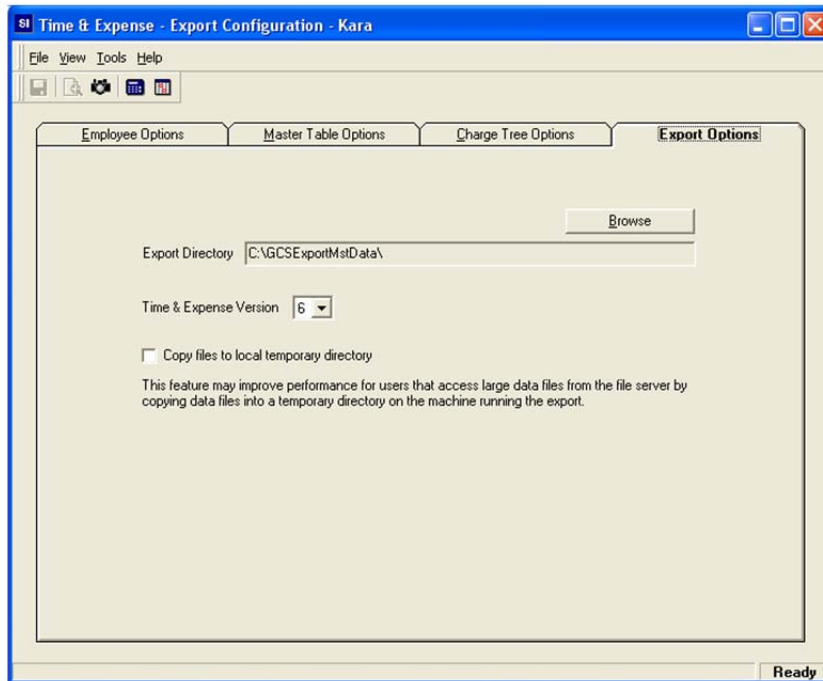


Setting	Notes	Type
Master Table Options - Download	<p>These settings control which GCS Premier data is downloaded to the UDT tables in Deltek Time\Expense\Self Service. It also controls which suffixes are downloaded.</p>	Time & Expense

Setting	Notes	Type
Master Table Options - Miscellaneous - Account Types	This setting controls whether accounts downloaded from GCS Premier are assigned the GCS Premier account type. If this checkbox is not selected, the system will download blanks and Deltek Time\Expense\Self Service will use the default as configured.	Time & Expense
Master Table Options - Miscellaneous - Labor Rates	This setting controls whether employees downloaded from GCS Premier will have labor rates assigned.	Time
Master Table Options - Miscellaneous - Leave	This setting controls whether employee leave balances are downloaded from GCS Premier.	Time
Master Table Options - Miscellaneous - Use DOB for Gov. ID	This setting allows you to use a person's date of birth as their default password rather than their SSN	Time & Expense

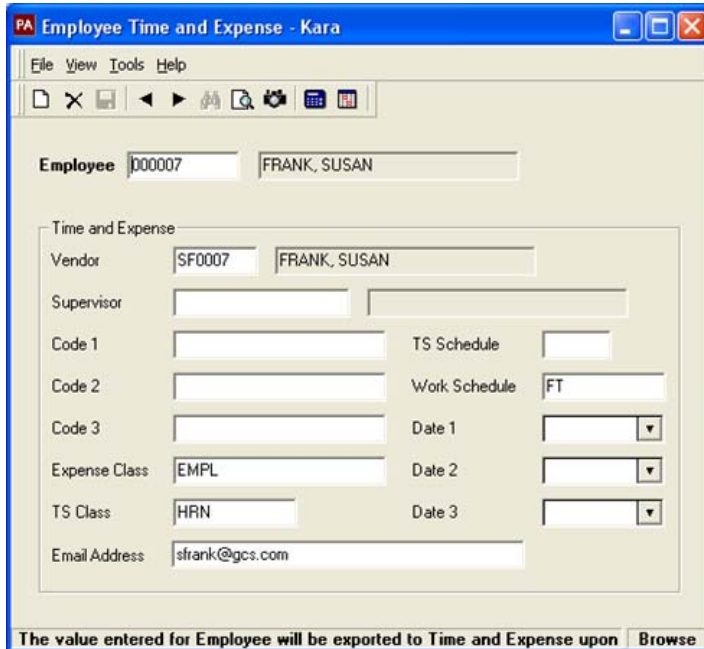
Setting	Notes	Type
Charge Tree Options	These settings control how charge trees are created and downloaded to Deltek Time\Expense\Self Service.	Time & Expense
Charge Tree	Select the options you wish to use to	Time &

Setting	Notes	Type
Options – Contract Options	build your Contract based Trees and branches	Expense
Charge Tree Options- Account Options	These options allow Trees to be built using Indirect Accounts.	Time & Expense



Setting	Notes	Type
Export Options - Export Directory	This controls in the directory in which the download creates the XML.	Time & Expense
Export Options - Time & Expense Version	This pulldown allows selection of the Time & Expense with ESS version that you are exporting master table data to. It is important that you select the correct version.	Time & Expense
Export Options – Copy files to local temporary directory	Select this option if you are exporting a large amount of data. This feature may also improve performance for any client running on a slower network.	Time & Expense

Employee Time and Expense



Use this GCS Premier screen to assign values to employees. You will later use these values when you select employees for downloading. You can also supply some of the details that will download for the employee. Every employee that you plan to download must have a record. The table below breaks out the fields.

Setting	Notes	Type
Vendor	This system will download this employee's vendor ID if Export Configuration is so set.	Expense
Supervisor	This system will download this employee's supervisor ID if Export Configuration is so set.	Time & Expense
Code 1	This system will download this user-defined code 1 if Export Configuration is so set.	Time & Expense
Code 2	This system will download this user-defined code 2 if Export Configuration is so set.	Time & Expense
Code 3	This system will download this user-defined code 3 if Export Configuration is so set.	Time & Expense
Expense Class	This system will download this employee's expense class if Export Configuration is so set.	Expense
TS Class	This system will download this employee's timesheet class if Export	Time

Setting	Notes	Type
	Configuration is so set.	
TS Schedule	This system will download this employee's timesheet schedule if Export Configuration is so set.	Time
Work Schedule	This system will download this employee's work schedule if Export Configuration is so set.	Time
Date 1	This system will download this user-defined date 1 if Export Configuration is so set.	Time & Expense
Date 2	This system will download this user-defined date 2 if Export Configuration is so set.	Time & Expense
Date 3	This system will download this user-defined date 3 if Export Configuration is so set.	Time & Expense

Export Master Tables



This screen extracts the GCS Premier data in accordance with the export configuration and creates XML files in the appropriate export directory where Deltek Time\Expense\Self Service can then import them.



You can initiate this process from this screen or via the batch manager. See the GCS Premier documentation for further details.

Import Employee Timesheets

This screen imports the ASCII file that contains the timesheets you exported from Deltek Time\Expense\Self Service.

The **Filename** option on this screen allows you to specify name of the file created from Deltek Time\Expense\Self Service.

Appendix C — Configure Deltek Mobile Time™

About Deltek Mobile Time

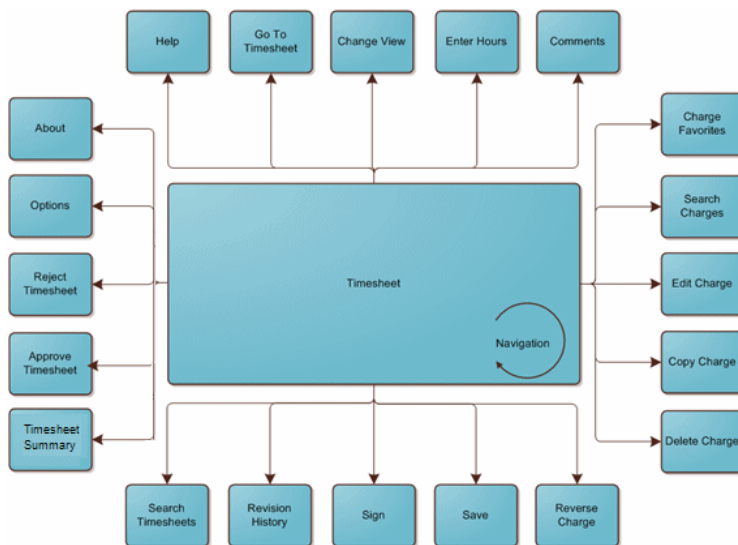
Deltek Mobile Time is an add-on product for users of the Time Collection module. It is completely interchangeable with the desktop version of Time Collection, and users can switch between the mobile and desktop versions without the need to synchronize between them.

Using Deltek Mobile Time, employees can complete the following time entry tasks from their mobile devices:

- View Labor Activity
- Record Labor Activity
- Update Labor Activity (Reverse Timesheet not supported)
- Submit Labor Activity
- Approve Labor Activity (Line Level Approval not supported)
- Reject Labor Activity (Line Level Approval not supported)

Currently, the BlackBerry® is the only supported mobile device.

The following diagram illustrates the functionality available in Deltek Mobile Time:



Licensing

Deltek Mobile Time supports seat licenses only. It does not support transaction licenses. To use Deltek Mobile Time, users must also be licensed for the Time Collection module.

Features Currently Excluded from Deltek Mobile Time

The following features are currently excluded due to security, compliance, or device limitations:

- **Single Sign On** – All employees must provide authentication information. LDAP and database authentication are supported, but Single Sign-on is not.

- **Time In/Out** – Employees whose timesheet class includes this feature cannot use Deltek Mobile Time.
- **Start/Stop Time** – Employees whose timesheet class includes this feature cannot use Deltek Mobile Time.
- **Day Comments** – Deltek Mobile Time does not provide the ability to enter day comments because the Time In/Out and Start/Stop Times features are not supported.
- **Interim Charges** – Employees cannot create interim charges from Deltek Mobile Time, but they can use interim charges already existing on the timesheet.
- **Hours Proration** – Employees whose timesheet class requires them to prorate hours can only view hours.
- **Reverse Timesheet** – Timesheets cannot be reversed in Deltek Mobile Time. Employees should complete this task from the Time Collection module.
- **Line Level Approval** – Line level approval is not available in Deltek Mobile Time.
- **Timesheet Print** – Timesheets cannot be printed from Deltek Mobile Time.

Supported Devices

Deltek Mobile Time supports the following BlackBerry® devices:

- BlackBerry 83xx (Curve)
- BlackBerry 85XX (Curve 2)
- BlackBerry 87xx
- BlackBerry 88xx
- BlackBerry 8900 (Curve)
- BlackBerry 90xx (Bold)
- BlackBerry 9630 (Tour)
- BlackBerry 9650 (Bold)
- BlackBerry 97XX (Bold 2)
- BlackBerry 9800 (Torch)

Supported Networks

We generally support any cellular network provider if the device and device operating system is supported. Below is a list of the most common US Based cellular providers with indication as to whether we have tested devices with that network:

- Alltel
- AT&T
- T-Mobile
- Verizon
- Nextel
- Sprint

Implementation Requirements

To implement Deltek Mobile Time, the following components are required:

- Blackberry Enterprise Server (4.1.6 or greater)
- Operational version of Deltek Time & Expense with ESS version 9.0
 - Upgrade to 9.0 from any of the following versions: 7.1.6, 8.1.x, 8.2.x, 8.3.x
 - New 9.0 installation
- Licenses for Deltek Mobile Time
- Costpoint clients must be running Costpoint 6.1 or greater
- GCS clients must be running GCS Premier 5.0 or greater

Steps for Installing Deltek Mobile Time

Step 1: Install Deltek Time & Expense with ESS version 9.0

Before you install the Deltek Mobile Time application, you must first install Time & Expense with ESS version 9.0. You can download the installation guide (in PDF format) from the Deltek Customer Care Connect site at <http://support.deltek.com>.

Step 2: Install the Deltek Mobile Time Application

The Deltek Mobile Time application is a separate installation, which is performed on your BlackBerry Enterprise Server. It should be installed only after you have installed Deltek Time & Expense with ESS version 9.0.

For instructions on installing Deltek Mobile Time, see the *Deltek Mobile Time™ 9.0 New Installation Guide*. You can download this guide (in PDF format) from the Deltek Customer Care Connect site at <http://support.deltek.com>. It is also available from the Deltek Software Distribution site when you download the software.



The remaining configuration steps, which are outlined below, can be performed immediately after you install Deltek Time & Expense with ESS 9.0 (Step 1), or you can perform them after you install the Deltek Mobile Time application.

Steps for Configuring Deltek Mobile Time

Step 1: Enable users to log on using a PIN

This step is optional. You can allow users to log on to Deltek Mobile Time using a PIN (personal identification number) instead of a password. The PIN is automatically synchronized with the regular system password, but it cannot be used to log on to the desktop version of the Time Entry module.

Because the PIN is synchronized with the password, the PIN stands in for the password when users log on to Mobile Time. However, since the PIN is only four digits, it is easier to enter it when logging on from a hand-held device.

When an employee later changes his or her system password, the PIN is automatically synchronized with it. However, should a logon attempt be made before the synchronization occurs, Deltek Mobile Time requires the user to enter the system password instead.

To enable the PIN option, complete the following steps.

1. From the main menu in Deltek Time & Expense with ESS, click the **Configuration » General » General Options** tab
2. On the General Options tab, select the **Allow PIN use on mobile device** check box.
3. Click **Save**.



Employees who wish to use a PIN must enter it in the **PIN** field of the Mobile Time User Options screen.

Step 2: Set UDT Short Labels

Because mobile devices have a more limited screen space, you may want to create abbreviated versions of UDT labels. This is accomplished from the **Mobile Label** column on the UDT tab in General Configuration.

To set UDT short labels for Deltek Mobile Time, complete the following steps:

1. From the main menu in Deltek Time & Expense with ESS, click the **Configuration » General » UDT Options** tab
2. In the **Mobile Label** column on the UDT tab, enter an abbreviated version for each applicable UDT. For example, if UDT 01 is "Account," the abbreviated version could be "Acct."

Step 3: Set Default View and Sort Options

In this step you will set the default options for both Timesheet View (1 column/ 6 rows, or 1 column/3 rows) and Timesheet Line Sort (sort by Project ID, Project Description, or Line Number). Employees can later override these default options from the Options menu within Mobile Time.

To set the default options, complete the following steps

1. From the main menu in Deltek Time & Expense with ESS, click the **Configuration » Time » Miscellaneous** tab.
2. From the **Timesheet View** drop-down list under **Mobile Defaults**, select the number of lines (3 or 6) that you want to display on the timesheet.
3. From the **Timesheet Line Sort** drop-down list, select the default for sorting timesheet lines, either *UDT 01*, *UDT 02*, or *Line Number*.
4. Click **Save**.

Step 4: Configure Charge Lookup Options

In this step you will configure the charge lookup options that will be available to employees from the Deltek Mobile Time Search Charge Lookup screen. Note, however, that if you already have an existing Time & Expense with ESS installation, these options may already be configured, and the current configuration settings will automatically apply to Deltek Mobile Time.

To set the default options, complete the following steps:

1. From the main menu in Deltek Time & Expense with ESS, click **Time Setup » Timesheet Classes » Basic Information** tab.

2. Use the Search feature to select the Timesheet Class that you want to configure for Deltek Mobile Time.
3. Under **Costpoint/Mobile Time Lookup Options**, select the check box next to each lookup option you want to enable.
 - Show Project
 - Show MO (this option is available only to Costpoint users)
 - Show Account
4. Click **Save**.



Hint: While you have the Timesheet Summary screen open, confirm that the **Time In/Out** and **Start/Stop Times** options are disabled. If these options are enabled, members of this timesheet class cannot access Deltek Mobile time.

Step 5: Create the Message Bundle Location

In this step you will create a location for storing the Mobile Time message bundles.


To set the message bundle location, complete the following steps:

1. From the Technical Console, open the Domain Details screen.
2. In the **Mobile Message Bundle Location** field, enter the location where message bundle files should be stored.
3. Click **OK** to save your changes.

Step 6: Customize Application Text and Generate the Message Bundle File

To customize the application's text and generate the message bundles, complete the following steps:

1. From the main menu in Deltek Time & Expense with ESS, click the **Configuration » Custom Text**.
2. On the Custom Text screen, select **Mobile** from the Module drop-down list.
3. From the **Screen/Application** field, select the screen or application for which you want to create custom text.
4. If applicable, select a value from the **Page** drop-down list.
5. Select the check box next to the message you want to customize and click **Edit**.
6. In the Edit Text box, enter the custom text and then click **OK**.
7. Repeat steps 3-6 for each remaining application that requires custom text.
8. When you have finished customizing the text messages, click **Create File(s)** to generate the message bundle files.
9. In the Create File(s) dialog, review the selected languages. If you don't want to generate a message bundle for any of the selected languages, clear the check box next to that language.
10. Click **Create File(s)**.

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

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The files are saved in the location you provided in the **Mobile Message Bundle Location** field of the Domain Details screen in the Technical Console.

Step 7: Grant Users Access to Deltek Mobile Time

You can grant access to Deltek Mobile time from either the Employee Information screen or the Password Utility.

To grant access from the Employee Information screen, complete the following steps:

1. From the main menu in Deltek Time & Expense with ESS, click **Personnel » Employee Information**.
2. On the Basic Information tab, select the employee for whom you want to grant access.
3. Under Access, select the **Mobile Time** check box.

To grant access from the Password Utility, complete the following steps:

1. From the main menu, click Utilities » Password Utility.
2. From the Function drop-down list on the Criteria tab, select the functional role to which want to grant access.
3. From the Action drop-down list, select Grant Access.
4. From the Module drop-down list, select Mobile Time.
5. From the License Type drop-down list, select Seat.
6. Optionally, to apply your selection criteria to a single employee, enter all or part of the employee's last name in the Employee field, or to apply your selection to the entire group, leave this field blank.
7. Click Execute.



If the search is successful, the results display on the Results tab, where you complete the process of granting access to the selected employees.

8. On the Results Tab grid, select the check box of each employee to whom you want to grant access, or click the uppermost check box to select all employees listed in the grid.
9. Click **Update**.

Other Information Resources

The following are also available to help users learn how to use Deltek Mobile Time.

Quick Reference Cards – These documents are available in PDF format from the Deltek Software Distribution site or from the Customer Care site. They provide a graphical overview of using Deltek Mobile Time, including logging on, entering time, and selecting charges.

Online Help – Online help for Deltek Mobile Time is available directly from the BlackBerry. Click Help on the menu from any screen to open the Table of Contents.