Deltek Time & Expense™ Version 10.0 (CU 10)

Hosted Help Release Notes

June 27, 2016

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Contents

Overview

Welcome to Deltek Time & Expense Version 10.0 Release Notes.

The General Availability release of version 10.0 is also Cumulative Update 10. Cumulative updates 01-09 were released during the Limited Availability period.

For the version 10.0 release, Deltek Time & Expense has been fully integrated into the Costpoint framework and interface. Time & Expense displays as its own domain within Costpoint. Although it has been ported to Costpoint, all the basic program functionality is unchanged.

If your installation of Time & Expense is co-deployed with Costpoint, Time & Expense displays as a new domain in the left navigation pane. Depending on your role, you may already be familiar with the navigation, toolbars, and basic screen functionality of Costpoint. Please see the *Deltek Costpoint 7.1.1 Deployment Options Technical Overview*.

If you did not previously have a Costpoint installation or, if you only used Time & Expense to enter timesheets and expense reports, you should acquaint yourself with the new interface before using version 10.0.

See “Available Documentation for this Release” on page 2 for a complete list of the training documentation available with this release.

Known Issues

Online Help is currently not loading correctly in **Microsoft Edge**.

Microsoft Edge is the default web browser for Windows 10. If you use Time and Expense in Windows 10 and load the local help, the help topics may not display correctly and some links may not work. As a workaround, use Google Chrome to browse for the help topics you want to view.

Alternatively, you can use hosted help.

1. Click System Administration » Configuration » System Configuration » Online Help Settings tab.
2. Select the **Connect to Hosted Help via Customer Care Site** check box.
3. Enter any valid Deltek Customer Care Connect credentials in the User Name and Password fields.
4. Click  or .

If you use **Internet Explorer** and the help does not display correctly, you need to turn **Off** Compatibility View for the browser.

Click **Tools » Compatibility View Settings**, and clear the **Display Intranet Sites in Compatibility View** check box.

Then refresh the browser. You could also elect to use hosted help or the FQDN of your server in the URL (for example, server.domain) to bypass this issue.

Important:

Make sure you remove **deltek.com** (if listed) from the Websites you have added to Compatibility View list.

Available Documentation for this Release

This section describes all the documentation available for this release.

Documentation in this section is broken down by category, as follows:

- **User Basics Documentation** – Guides and documents listed in this section are intended for all users who are unfamiliar with the Costpoint interface.
- **Technical Documentation** - Guides and documents listed in this section are intended for Time & Expense administrators.

Deltek Time and Expense 10.0 Online Help is not yet available. Except where noted, all the user guides and quick reference guides described below are available for download from the Deltek Customer Care Connect site.

User Basics Documentation

Getting Started Guide with the Interface and User Basics

The *Deltek Costpoint Interface Getting Started Guide* contains updated information about the Costpoint interface and application functions, with tips for navigating through Costpoint.

Use this guide as a starting point for learning about the Costpoint interface. There are many notable differences between version 10.0 and earlier versions of Time & Expense, because the application now resides within the Costpoint framework. Costpoint was previously used in conjunction with Time & Expense, but they were separate applications with distinct interfaces.

Before you begin using the version 10.0 screens, you should first familiarize yourself with the interface basics. The table below describes key areas of the guide.

Document Name	Description
Global Menu and Toolbars	The Global Menu provides easy access to commonly used functions, so you can carry out your tasks quickly and efficiently. Each menu item drills down to reveal options that are applicable to an open application/task or active window. Use the items in the Toolbar Menu to save work to the database, clone records, refresh the current application, manage printing tasks, and many other functions. To learn more about the Global Menu and Toolbar, see page 6 of the *Deltek Costpoint Interface Getting Started Guide*.
Domains and Modules	Costpoint is organized into five program areas, or domains. The Navigation screen displays these domains in the stack on the left side. These domains are further categorized in a series of three panes. Starting from left to right, you can navigate from the highest-level

Document Name	Description
	program domain down to the desired application. Each domain in Deltek Costpoint is subdivided into modules, which are displayed on the left pane next to the domain list. When you select a module, the list of application groups displays on the second pane. You only see those domains, modules, and applications to which you have access rights. If you have questions concerning access/permissions, please contact your administrator.
Ease of Access Features	Costpoint has a **Lookup** and **Autocomplete** feature that makes it easy for you to create new records and find the data that you need.
User Preference Functions	Costpoint has a **Change Default Period** feature which you can use to change your default fiscal year, period, and subperiod for the current module. It also has a **Maintain My Menu** feature which you can use to create a custom user menu for quick access to your most frequently used screens, including the Manage My Desktop screen.

Quick Reference Cards

A Quick Reference Card displays a visual presentation of summary information about a system feature or screen.

Currently, four quick reference cards are available:

- **User Interface** – This card contains information about the Costpoint interface and navigation.
- **Shortcut Keys and Toolbar Icons and Buttons** – This card lists the shortcut keys and icons available in Costpoint.
- **Query and Lookup** – This card shows you how to use the Query and Lookup features.
- **Views** – This card explains the differences between Table View and Form View.

You can also obtain these Quick Reference Cards from the Deltek Software Manager.

Videos

See the Getting Started section of the online Help for videos on a variety of topics, including:

- Basic Printing
- Copying to MS Excel
- Using Lookup and Query

- Changing the Global Icons
- Printer Setup and Saved Printer Parameters
- Error Messages
- How to Run Multiple Sessions
- Manage User Interface Profiles
- Job Server

Note also that within the Time & Expense online help system, you will also find other videos available that are specific to the using the Time & Expense applications.

Menu Maps

If you are moving to version 10.0 from version 9.0.1 or earlier, the Time & Expense Menu Maps can help you locate your applications. Menu Maps can be downloaded from the Deltek Software Manager.

- **9.0.1 to 10.0 Menu Mapping –**— The left column of this Menu Map lists the version 9.0.1applications in menu order. Find the application you want to open. The second column displays that application's menu path in version 10.0.
- **10.0 to 9.0.1 Menu Mapping –**– The left column of this Menu Map lists the version 10.0 applications in menu order. Find the application you want to open. The second column displays that application's menu path in version 9.0.1.

Technical Documentation

Deltek Time & Expense 10.0 is built on the Deltek Costpoint platform. As a result, it inherits and benefits from the standard features of Costpoint and shares the available technical guides.

Costpoint Technical Guides

Deltek Time & Expense 10.0 is built on the Deltek Costpoint platform. As such, it inherits and benefits from the standard features of Costpoint and shares the available technical guides.

The guides and documents are described in the table below and can provide administrators with additional information about Costpoint features and benefits.

Document Name	Description
Deltek Costpoint 7.1.1 Configuration Utility	This document describes how to use the Costpoint Configuration Utility, which helps Costpoint administrators perform the most common configuration tasks.
Deltek Costpoint 7.1.1 Content Management Integration	This document describes how to configure and tune the Costpoint Content Management Integration (CMI) application to provide access to Microsoft SharePoint™, as well as other Content Management Systems (CMS) that are compliant with the Content Management Interoperability Standard (CMIS).
Deltek Costpoint 7.1.1 DB Wizard Utility	This document describes how administers can use the DB Wizard utility to apply hot fixes and

Document Name	Description
	database structure changes to Costpoint installations.
Deltek Costpoint 7.1.1 Deployment Options Technical Overview	This document provides a high level overview of various Costpoint configuration options, including server, database, and security options.
Deltek Costpoint 7.1.1 Integration Overview	This document provides a high level overview of how Costpoint reports, processes, and data can be integrated with third-party applications via Web services.
Deltek Costpoint 7.1.1 Integration Console	This document is a detailed guide to the Costpoint Integration Console, which automates the process of integrating Costpoint reports, processes, and data with third-party applications via Web services.
Deltek Costpoint 7.1.1 Message Boards	This document describes how integration between Costpoint and MS Exchange can enable collaboration among Costpoint users as well as between Costpoint and non-Costpoint users. This capability also allows you to link e-mails with attachments directly to Costpoint documents and view them directly from Costpoint.
Deltek Costpoint 7.1.1 Monitoring Utility	This document describes how to use the Monitoring Utility to diagnose Costpoint configuration problems.
Deltek Costpoint 7.1.1 Performance Optimization	This document contains Costpoint performance tips and tricks, information on the configuration of the Deltek performance lab, as well as a list of optimized applications for the Oracle parallel SQL execution option.
Deltek Costpoint 7.1.1 Post Installation Hardening Guide	This document presents common principles and recommendations that administrators should consider for post-installation hardening of the Costpoint server environment.
Deltek Costpoint 7.1.1 Process Execution Modes	This document describes the many options for executing reports and processes in Costpoint, including using interactive and batch modes and job servers.
Deltek Costpoint 7.1.1 Security	This document describes user authentication and other security safeguards in Costpoint.

Document Name	Description
Deltek Costpoint 7.1.1 User Migration Utility	This document describes how to migrate users from earlier Costpoint versions to Costpoint 7.1.1.
Deltek Costpoint 7.1.1 Extensibility Designer Coding Guide	This document contains java coding information for Costpoint Extensibility developers.
Deltek Costpoint 7.1.1 Extensibility Designer Quick Start Guide	This document outlines the basic steps for creating and deploying extensibility.
Deltek Costpoint 7.1.1 Extensibility Designer Report Guide	This document describes how to extend a report.
Deltek Costpoint 7.1.1 Extensibility Designer User Guide	This document contains detailed instructions for using the Costpoint Extensibility Designer.
Deltek Costpoint 7.1.1 Screen Customization and Business Logic Extensibility	This document is an overview of Costpoint's screen customization and business logic extensibility features.

Overview of Version 10.0 and General Changes

The integration with Costpoint provides several key benefits to Deltek Time & Expense, including but not limited to the following:

- Web Services/Extensibility – Provides the capability to customize and extend product functionality. Also provides the capability to create custom integrations.
- Enhanced authentication methods – Provides enhanced LDAP, SSO, and mixed authentication capabilities.
- Infrastructure enhancements such as clustering support, Oracle RAC and parallel execution – Provides benefits such as true failover support so that user sessions are not lost.
- Screen personalization – Modify screen layout by user or for a group of users.
- Tablet\Phone Support – Provides automatic screen resizing when used with a tablet or phone (Smart Phone Mode).
- Content management integration – Provides content management integration with SharePoint and other CMIS compliant systems (same as Costpoint).

Continuous Delivery Model

With this release, Time & Expense has moved to a "Continuous Delivery Model" where we will release new features and enhancements incrementally on top of Time & Expense 10.0 without requiring customers to upgrade to a major, minor or maintenance release as often as in the past.

New enhancements will be made available through DSM after development and testing are complete. These software changes can be applied in the same way that hot fixes, cumulative updates, and regulatory updates are currently applied, through a combination of system jar and application level changes.

Some features may require a new license, some may be enabled through a control/configuration setting, and others, such as an increase to a field size in the database, will be available once the changes are applied.

For more information on the Costpoint Continuous Delivery model, refer to KB article # 81289, or also see *DeltekCostpoint711ContinuousDeliveryModelWhitePaper.pdf*, available from DSM.

Subcontractor Management

Time & Expense version 10.0 integrates the new Costpoint Subcontractor Management functionality, enabling companies that co-deploy the systems to capture, approve, and export subcontractor labor and expenses. Consequently, various new fields have been added to key labor and expense screens, and the term “Employee” has been changed to “Resource” throughout the entire system.

Because Subcontractor Management utilizes a direct integration between Costpoint and Time & Expense, it requires a shared Costpoint 7.1.1 and Time & Expense 10 deployment model. To learn more about the Subcontractor Management, see the *Deltek Costpoint® 7.1.1 Release Notes: Subcontractor Management.*

Technical Console

The Technical Console is no longer available in version 10.0. In most cases, functionality was superseded through integration with Costpoint. Certain fields were added to existing Time & Expense screens. These are noted in sections of this document that discuss application changes.

Employee Self Service

The Employee Self Service (ESS) module has been separated from Time & Expense and will be integrated within the People domain of Costpoint in the near future.

Hosted Online Help

You can now access the online help for Time & Expense through the Web, instead of locally.

Users do need Internet access to use the help this way. The benefit of hosted help is that Deltek updates this help periodically. Regardless of whether you use hosted or local help, the process is the same—when you click **Shift+F1** or **HELP » Help**, the appropriate help topic displays.

To ensure that you always have the most current version of the help, Deltek strongly recommends using hosted help. Otherwise, you will only receive help updates as you download help updates from DSM, when they are available.

To enable the Hosted Help option, go to the Logging tab in the Configuration Utility and select the **Use Hosted Online Help** option.

Note also that version the version 10.0 online help was converted to a new delivery format, and as such, offers a new look and improved functionality.

The majority of the online help topics have been updated to reflect the interface changes that resulted from the conversion to the Costpoint framework. Note, however, that this is an ongoing process, and you may come across minor discrepancies or some areas that have not yet been updated, such as the topics for the Manage Expense Authorization and Manage Expense Report applications.

If you use Hosted Help, updated topics will be available to you as soon as they are completed.

Overview of Screen Layout Changes

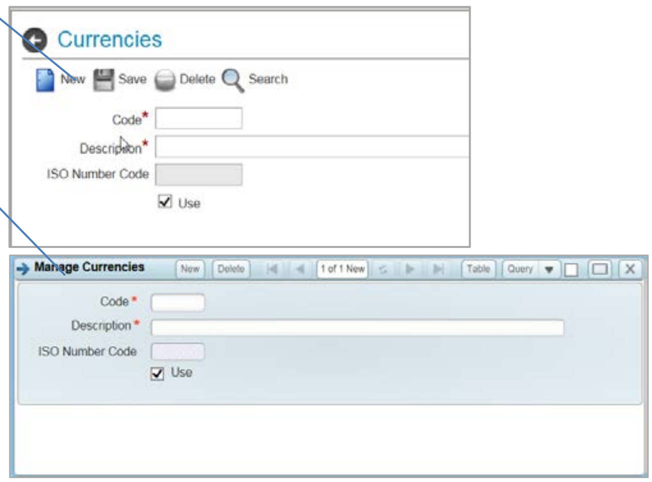
To help you understand basic differences in screen layout between version 10.0 and earlier versions of Time & Expense, this section compares a few version 9.0.1 screens to the screens in version 10.0. It is important to note, however, that though the interface has changed, functionality for most applications is virtually the same.

If you use Time & Expense primarily to enter timesheets, see "Manage Timesheets" on page 18 to learn more about screen changes in that application. The screens chosen as examples in this section are typically used by Administrators.

Simpler screens, for instance those without tabs, have not changed at all in terms of how fields display on the screen. For example:

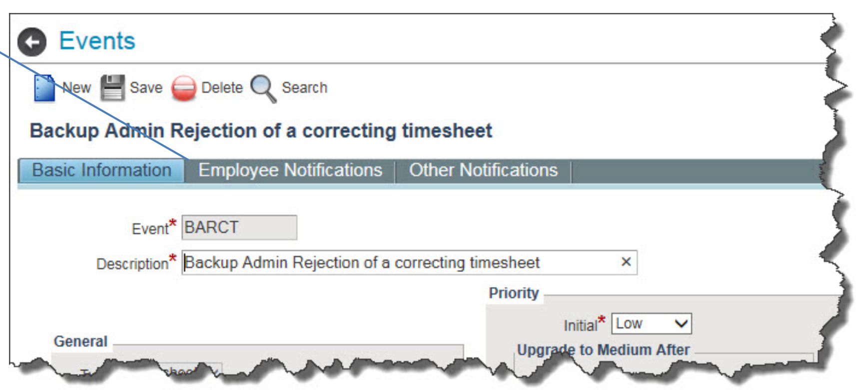
In 9.0.1, this screen displayed three fields and a check box.

The same three fields and check box display in the 10.0 version of this screen.



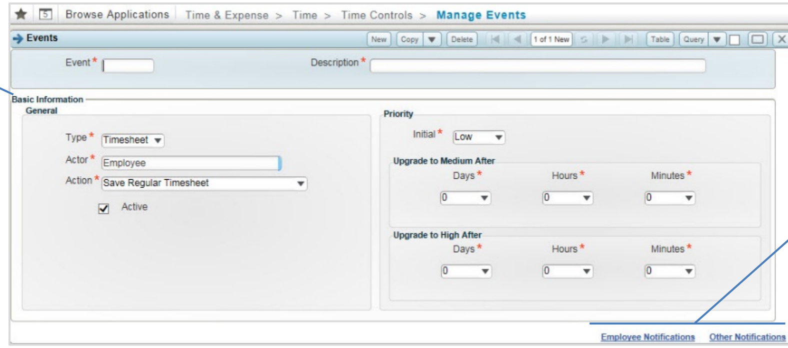
Screens that displayed tabs in earlier versions have undergone more significant layout changes. For example:

In earlier versions, the Manage Events screen displayed three tabs.



In many version 10.0, the tabs were converted to subtasks, which are opened by clicking the subtask link, as shown below:

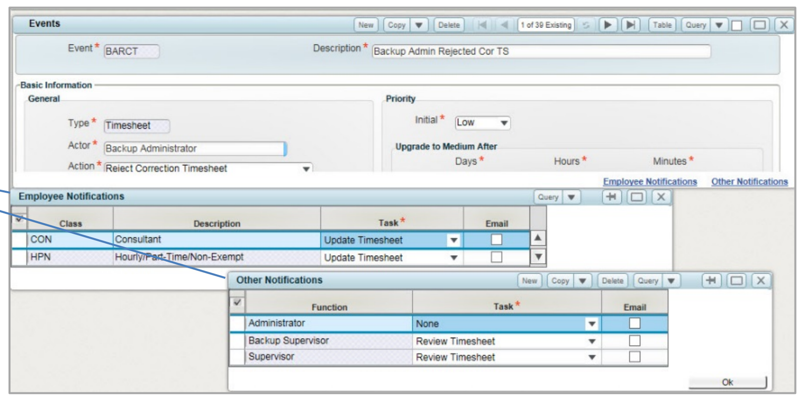
In version 10.0, the Basic Information tab on the Manage Events screen is now a section heading instead of separate tab.

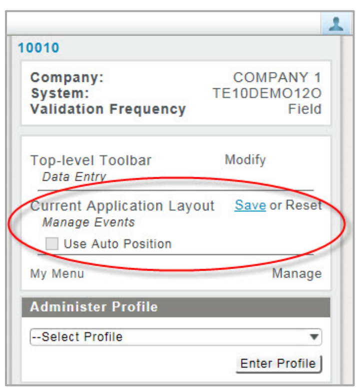


Employee Notifications and Other Notifications are now opened by clicking subtask links.

When you click a subtask link, the subtask opens as a separate element on the screen that you can position to suit your preferences. Subtasks collect and store additional information (also known as child data) related to the selected record on the main screen. To facilitate data entry, you can have multiple subtasks open simultaneously.

Once clicked, subtasks usually display below the main screen.





Save your application layout preferences using the Current Application Layout feature on the Screen Configuration menu.

In some applications, tabs have been only partially converted into subtasks, meaning the tab itself still exists, but certain sections are now separate subtasks. For example, in **Configuration » Controls » Configure General Settings**, the Miscellaneous tab still exists, but the Attachments section is now a separate subtask.

You may also encounter a few applications where a single tab was separated into multiple subtasks. For example, in **Expense » Controls » Expense Report Types**, information and fields previously found on the Expense Authorization tab now display in two separate subtasks:

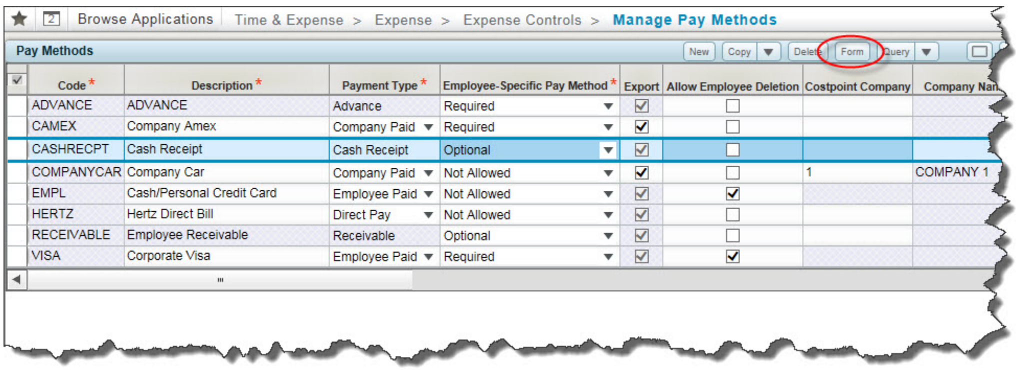
- Expense Authorization Tasks – Authorization
- Expense Authorization Tasks – Advance.

Screen layout changes such as these are noted by application in the “Overview of Changes by Application” sections of this document.

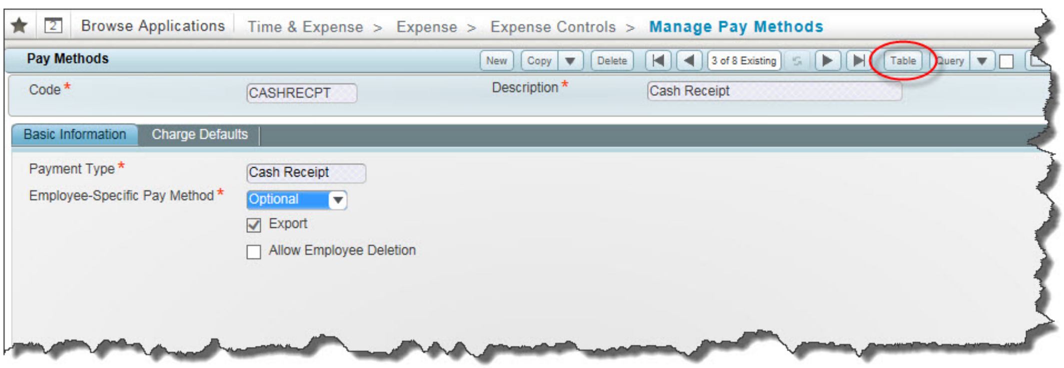
Table View and Form View

Any screen that has the Query function can display in Form View or Table View. Usually, if more than one row is returned in a Query, the screen displays in Table View.

In Table View, the fields display in a grid, as shown below.



In Form View, the screen displays as shown below, with the fields grouped on the screen.

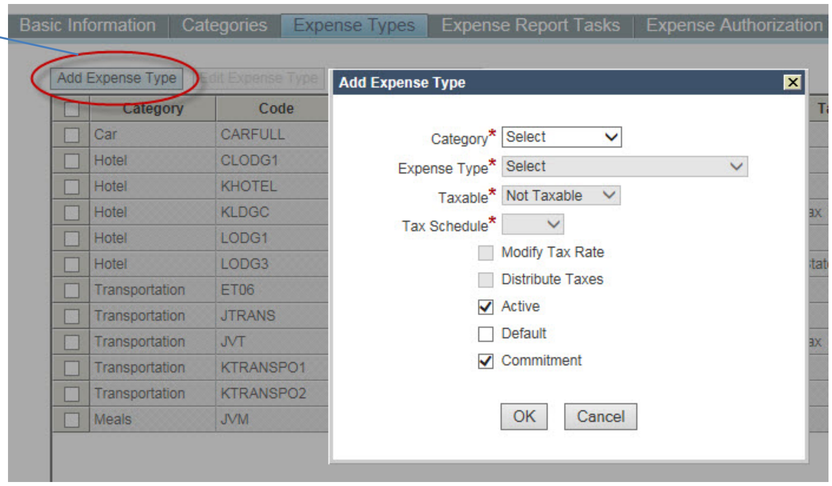


To toggle between the different views, click the **Table** or **Form** button on the application toolbar. Record selection may be easier in Table view, but depending on the screen, you may find that Form view is helpful when entering data or selecting field options.

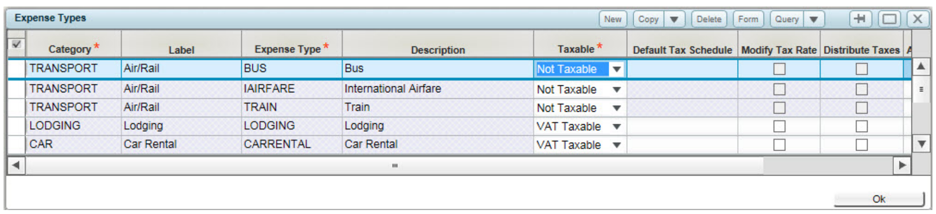
Adding and Editing Records in Subtasks

In earlier versions, child data that displayed in tables, such as Expense Types, was read- only, and dialog boxes opened when you clicked **Add** or **Edit**. For example, in 9.0.1 new expense types were entered in the Add Expense Type dialog box:

In Version 9.0.1, clicking **Add Expense Type** displayed the Add Expense Type dialog box.



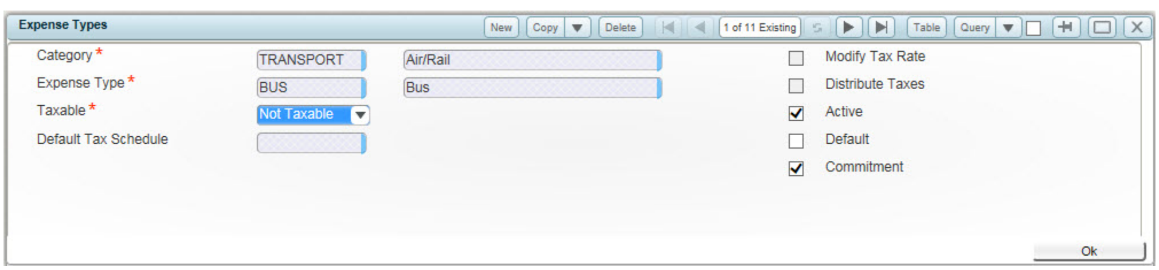
In version 10.0, dialog boxes are most often replaced with subtasks (child tables), where you can add and edit records directly in the table. Most subtasks allow you to toggle between Table View and Form View.



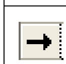
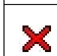
- Table View  – In some subtasks, Table View is the only display option.

  Click **New** to add new records.

- Form View  – Form View more closely resembles the dialog box layout of earlier versions, and works best for reviewing one record at a time. Use the navigational arrows to page through available records.



When you add, delete, or edit a line while working in table windows, symbols display beside each line that designate which lines will change when you save your table.

Symbol	Description
	Indicates rows that contain data you have modified
	Indicates rows you have added
	Indicates rows you have marked for deletion

Time Module Application Changes

This section describes changes made to applications in the Time module, including entering timesheets, and for supervisors, approving and rejecting timesheets.

Overview of Changes by Menu Area

Refer to the tables below for an overview of changes made to applications within the Time module. The tables are organized according to the version 10.0 menu structure. If a screen includes additional information within this document, a page number reference is included. Otherwise, refer to the online Help for additional information.

Timesheets

Application	9.0.1 Path	Overview of Changes
Manage Work Schedule	Schedule » Employee Work Schedule	Employee and supervisor functionality were separated into two screens. Manage Work Schedule is used by Resources (employees and contractors) to manage their own schedules.
Manage Resource Work Schedule	N/A (not applicable) in version 9.0.1.	New screen for supervisors and proxies to manage work schedules of employees and subcontractors. Previously, employee and supervisor work schedule functions were performed from the same screen.
Manage Timesheets	Record Time » Timesheet	The following is an overview of changes. ▪ You can display timesheets in Table view or Form view. ▪ A **Correct** button now displays on the timesheet header and replaces the Reverse Timesheet toolbar icon (see page 26). ▪ You now have greater flexibility in how columns are arranged. In earlier versions, columns on the timesheet could be resized but not rearranged. Your display preferences can be saved in your UI Profile. ▪ Instead of opening as a dialog box, areas such as Leave and Time In/Out open as subtasks, which can be pinned to the screen. You can save your layout preferences in your profile, making it easier to use and view these tasks as you enter time. ▪ Charge Favorites is easier to access and manage as it is now a separate subtask and no longer part of the Charge Lookup screen. See Page 18 for more information.

Application	9.0.1 Path	Overview of Changes
Approve Timesheet Charges	Process » TS Line Level Approval	**Work Assignment** has been added to Charge Options, enabling project managers to approve the labor activity incurred on subcontractor work assignments.
Manage/Approve Timesheets	N/A	This new screen enables managers to approve or reject timesheets and manage employee timesheets, including entering time and creating missing timesheets. See page 24 for more information.

Timesheet Reports/Inquires

Report and Inquiry screens in the Time module are more streamlined in version 10.0. In earlier versions, depending on the screen, the report or inquiry results displayed on the Results tab, where you could preview or print.

In version 10.0, use the Print options to preview and print results. On inquiry screens, the results display in a table on the main screen. Since the report and inquiry screens are no longer tabbed, other fields, such as those relating to workflow notifications, have been consolidated on the main screen as well.

Before you begin using the reporting screens, review the “Report Output Options” section of the *Deltek Costpoint Interface Getting Started Guide*, and see “Basic Printing” video available in the Getting Started area of the Costpoint online help.

Application	9.x Path	Overview of Changes
Daily Floor Check Inquiry	Audit » Daily Floor Check Inquiry	▪ Fields and tabs have been consolidated to a single screen. ▪ Alerts have been removed from Notification Types.
Timesheet Status	Audit » Timesheet Status	▪ Fields and tabs have been consolidated to a single screen. ▪ Alerts have been removed from Notification Types.
Timesheet Correction Status	N/A	New screen. If you are a supervisor, use this screen to review and manage timesheet correction requests from employees who report to you. You can approve or reject the employee's request. See page 27 for more information.
Print Resource Activity Report	Analyze » Employee Activity	▪ Fields and tabs consolidated to a single screen. ▪ The **Show Self Only** check box replaced the “Self” option that was previously on the Function drop-down list. If you are assigned more than one function, select the function/group from the Employee Selection table.

Application	9.x Path	Overview of Changes
Print Charge Activity Report	Analyze » Charge Activity	▪ Fields and tabs have been consolidated to a single screen. ▪ *Work Assignment* and other options related to Subcontractor Management have been added to screen Lookups.
Print Resource Utilization Report	Analyze » Utilization Inquiry	▪ Fields and tabs have been consolidated to a single screen. ▪ *Work Assignment* and other options related to Subcontractor Management have been added to screen Lookups.
Print Timesheets by Charge	Analyze » Print Timesheets by Charge	New options: ▪ Entered Hours ▪ Prorated Hours
Print Billing Backup Report	Analyze » Billing Backup	No significant changes.
Print Interim Timesheet Report	Analyze » Interim Timesheet	Fields and tabs have been consolidated to a single screen.

Timesheet Interfaces

Application	9.x Path	Overview of Changes	See...
Export Timesheets	Process » Export Timesheets	**New Subcontractor Management Fields** ▪ Subcontractor Export ▪ Make Next Period Current **Other New Fields** ▪ File Location ▪ File Name **Screen Changes** ▪ The **Print** button have been replaced by print functionality on Global toolbar. ▪ **Process** and **Export** buttons have been replaced by on Global toolbar.	

Time Controls

Application	9.x Path	Overview of Changes
Configure Time Settings	Settings » Time Configuration	**UDT Options Tab** ▪ Now a subtask instead of a tab. ▪ Signature/Approval Task is now a separate subtask. **Export Options Tab** ▪ **Export Filter** and **Export** have been relocated to the UDT Options subtask table. **Miscellaneous Tab** ▪ **Number of my Timesheets** removed. ▪ **Charge Default Description** removed. ▪ **Mobile Defaults** removed. ▪ **Must Use Predefined Revisions** has been added. Select this to require Resources to use revision messages. **Revision Explanations Subtask** ▪ New. Enter standardized timesheet revision messages. Can be optional or required based on setting.
Manage Utilization Categories	Settings » Utilizations	No changes.
Manage Leave Types	Settings » Leave Types	Tabs are now subtasks.
Manage Company Work Schedules	Settings » Company Work Schedules	A Date field with calendar icon were added, which replaces the screen calendar.
Manage Timesheet Schedules	Settings » Timesheet Schedules	Add, edit, or delete schedules directly in the Timesheet Schedule Periods table instead of the Add/Edit dialog box.
Manage Wage Schedules	Settings » Wage Schedules	Add, edit, or delete schedules directly in the Wage Schedule Rates table instead of the Add/Edit dialog box.
Manage Events	Settings »Events	Employee Notifications and Other Notifications are now subtasks instead of tabs.
Manage Interim Charges	N/A	This new screen replaces the option to create timesheet charges directly from the timesheet.

Time Utilities

Application	9.x Path	Overview of Changes
Mass Correct Timesheets	Utilities » Mass Correct Timesheets	▪ The **Group** drop-down list was added. Choose *All* or *Selected*. If you choose *Selected*, use the **Select Employee Groups** subtask to select which employee groups to include. ▪ The **Execute** button has been replaced by on Global toolbar.
Generate Timesheets	Utilities » Record Time » Generate Timesheets	These screen buttons have been replaced by options on the Global menu: ▪ **Print/Preview** was replaced by options under . ▪ **Generate** replaced by options under .
Change Timesheet Status	Utilities » Change TS Status	No changes of note.
Rebuild Leave Taken	Utilities » Rebuild Leave	No changes of note.
Clear Timesheets	Utilities » Clear Timesheets	The **Execute** button label changed to **Clear Timesheet**.
Timesheet Transfer	Utilities » Timesheet Transfer	No changes of note.

Other Changes of Note

- Direct Charge Lookup — This functionality is no longer supported. Changes are underway that will improve the functionality and are forthcoming in a future release.

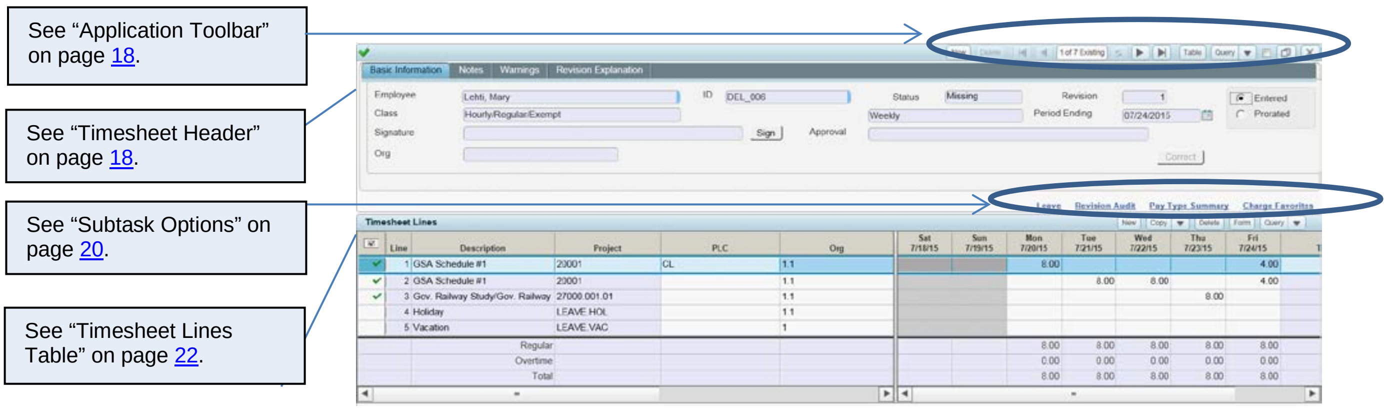
Manage Timesheets

The Manage Timesheet screen is located on the **Time » Timesheets » Manage Timesheets** menu. Use this screen to record time.

In earlier versions of Time & Expense, you opened this screen by clicking **Time » Record Time » Timesheet**.

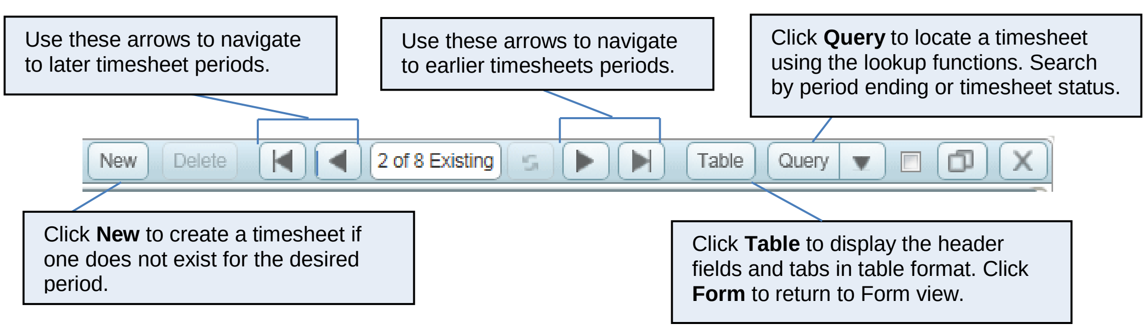
To open an existing timesheet, choose from the following options:

- Click **Time » Timesheets » Manage Timesheets** and use the navigational arrows or query function to locate the timesheet.
- Click **Configuration » Resources » Manage My Desktop** and select the timesheet task you want to open.



Application Toolbar

Use the application toolbar to create a new timesheet record or to navigate to existing records.



Note that the back arrow (left pointing) advances the display to more recent records, and the forward arrow (right pointing) moves to earlier records. In earlier versions, the arrows worked in the exact opposite manner.

Additionally, if you navigated to a timesheet period that did not yet exist, you were prompted to create a timesheet, but in version 10.0, you must click **New**.

When you switch from Form view to Table view, all the information in the header, including the tabs, display in a table. You should experiment with both layouts to see which you prefer. See the *Getting Started with the Interface and User Basics* guide to learn how to save your preferences.

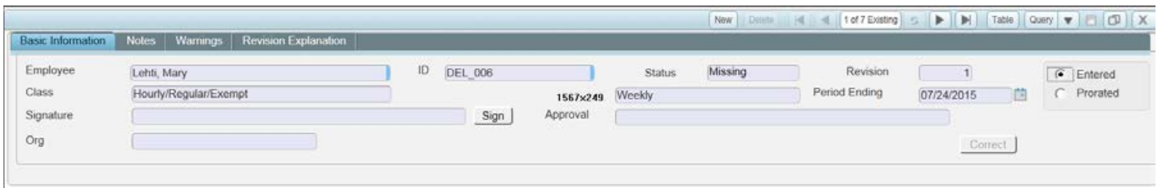
Timesheet Header

The header area of the version 10.0 timesheet includes the same basic information, but now includes tabs for functions or processes that previously opened in dialog boxes.

The toolbar icons that displayed at the top of the 9.x header have been largely replaced by subtask links. Those changes are covered under "Subtask Options" on page 20 of this document.

Basic Information Tab

The Basic Information tab of the header area displays the employee name, timesheet status, revision number, timesheet class, and the timesheet period ending date.



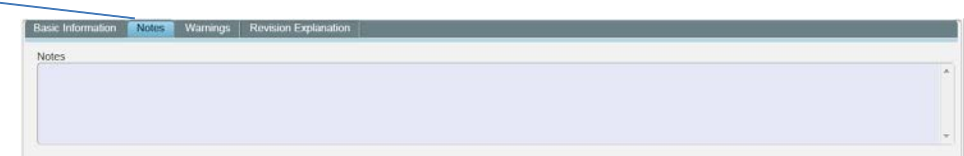
However, it also displays fields that in earlier versions were located in the footer area, including the following:

- **Signature** — If the timesheet has a status of Signed, this field displays the name of the signer and a time/date stamp.
- **Sign** — Click this button to sign your timesheet. A message displays confirming the action, but in the current version, you are not required to enter your password.
- **Approval** — If the timesheet has a status of Approved, this field displays the name of the individual who approved it and a time/date stamp.
- **Correct** — This button is enabled on timesheets only under certain conditions. This new feature replaces the Reverse Timesheet function.
- **Entered** and **Prorated** — Toggle between these options to display entered or prorated hours. In version 9.x, these fields displayed if your company configured the Hours Proration settings. In version 10.0, they display on the interface even when Hours Proration is not enabled. In that case, either setting displays entered, not prorated, hours.

Notes Tab

Select the Notes tab in the Timesheet header to view notes associated with the timesheet.

The Notes tab is read-only and displays text added to the timesheet by your supervisor or administrator.



In earlier versions, notes displayed in the Notes dialog box after you clicked  on the timesheet toolbar.

Warnings Tab

Select the Warnings tab in the timesheet header to display all the Save, Sign, and Approve warnings associated with timesheet.

When you save or sign your timesheet, warnings initially display in a pop-up message window. After you click **OK**, the message is saved to the Warnings tab.

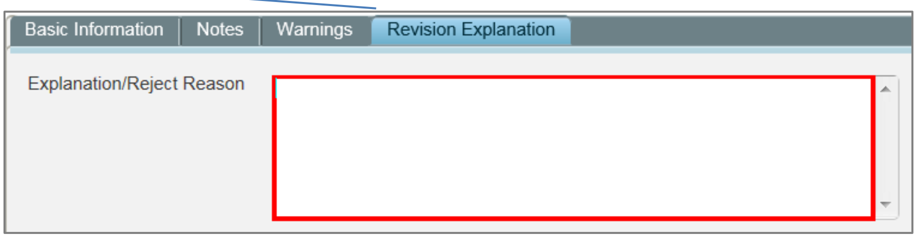
The Warnings tab is read-only and stores all the warning messages associated with the timesheet.

In earlier versions, warnings displayed in a dialog box that opened automatically during validation.

Revision Explanation

Select the Revision Explanation tab in the timesheet header to display revisions.

The Revision Explanation tab displays when you make revision that requires an explanation.



Dismiss the message after you enter a reason.

The tab displays automatically if you make a revision that requires an explanation after you click **Save** or **Save & Continue**. Type your explanation in the **Explanation/Reject Reason** field. The field is outlined in red when a revision explanation is required.

To view the revision history of the timesheet, click the **Revision Audit subtask**. For more information, see “Subtask Options” on page 20 of this document.

Subtask Options

Subtasks collect and store additional information (also known as child data) related to the selected record on the main screen.

The subtasks for the Timesheet display between the header area and Timesheet Lines table. The links that display can vary based on company configuration settings.

After you click a link, the selected subtask displays below the Timesheet Lines table

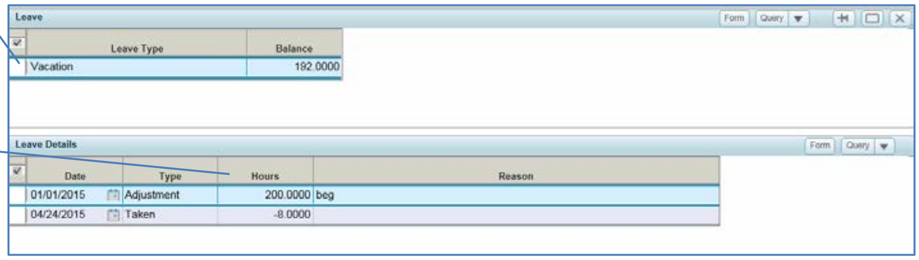
You can control where on the screen subtask tables display, and you can have multiple subtasks open at the same. After you position them, you can save your settings, and Costpoint will remember them next time you display the Timesheet screen. See *Getting Started with the Interface and User Basics* guide for more information.

Leave Subtask

Click the **Leave** subtask to view leave hours. To print leave information, click on the Global menu and select **Leave Status** on the short-cut menu.

In the Leave table, select the type of leave you want to view.

Leave balances for the selected leave type display in the Leave Details table.



In version 9.x, you clicked on the timesheet toolbar to display the Leave dialog box, which included a Print/Preview button.

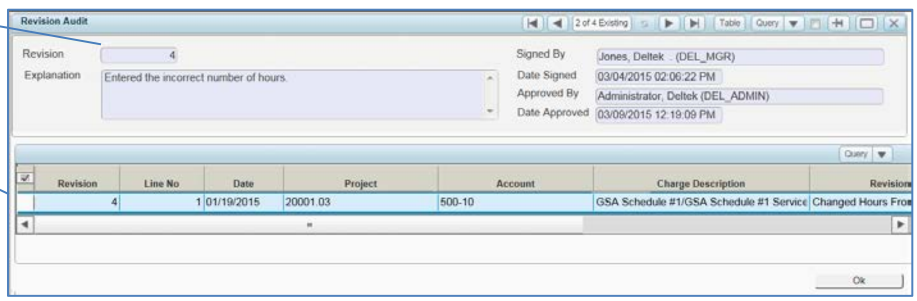
Revision Audit Subtask

Click the **Revision Audit** subtask to view the revision history for the timesheet.

Use the directional arrows to navigate to other revision records.

The Revision field displays the revision number.

Revision details display in the table.

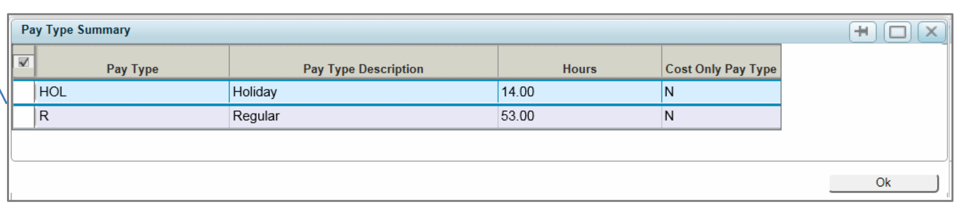


In earlier versions, you clicked on the toolbar to open the Revision Audit dialog box, and instead of using directional arrows, you selected revisions from the Revision drop-down list.

Pay Type Summary Subtask

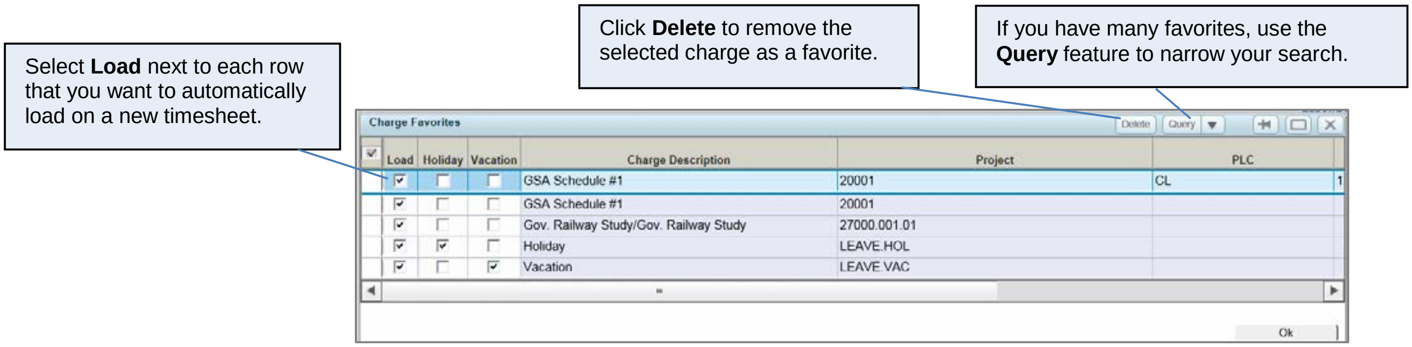
Click the Pay Type Summary subtask to view a summary of hours by Pay Type, such as regular hours and vacation hours.

The pay type information is read-only.



Charge Favorites Subtask

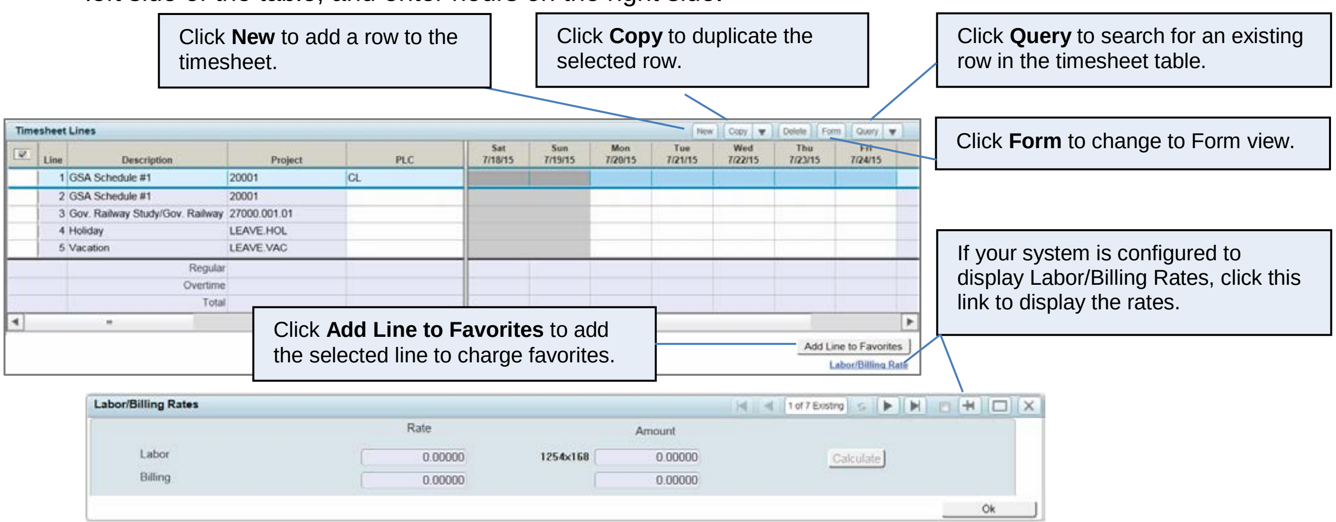
Click the Charge Favorites subtask to manage existing charge favorites. Instead of the tree structure which existed in earlier versions, the charges display in table format.



In earlier versions, you clicked the Lookup icon on a timesheet row and then clicked Favorites in the Charge Lookup dialog box. Charge Favorites were navigated using a tree structure.

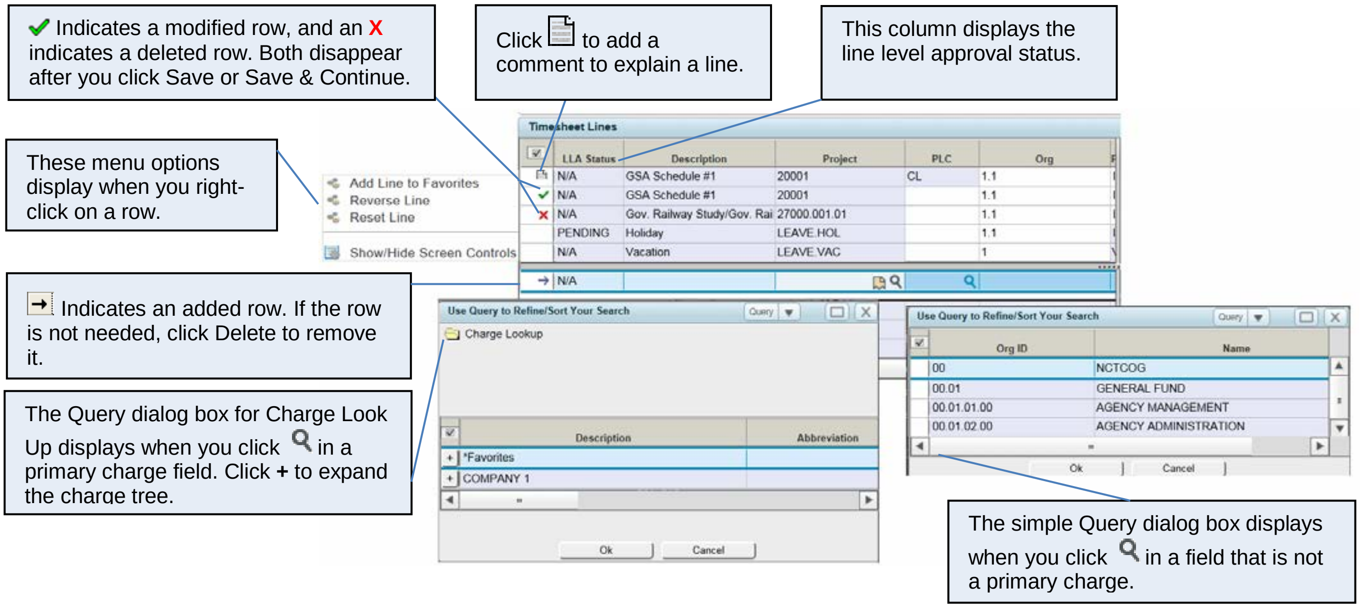
Timesheet Lines Table

Enter hours in the Timesheet Lines table. Similar to version 9.x, you select charge codes on the left side of the table, and enter hours on the right side.



Left Side of the Timesheet Lines Table

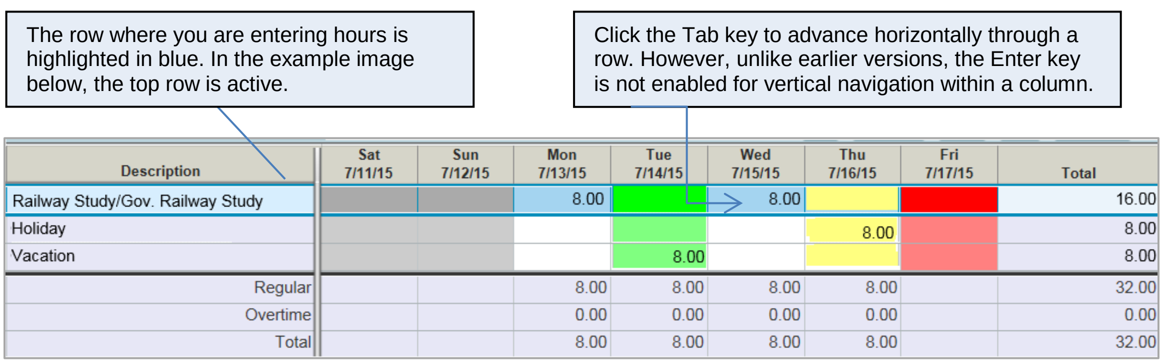
After you add a row to the Timesheet Lines table, select or enter project charges on left side of the table.



Columns on your timesheet may appear in different order than the screen image above.

Right Side of the Timesheet Lines Table

Enter hours by typing directly in the table cell, or enter hours in Form view.



Description	Sat 7/11/15	Sun 7/12/15	Mon 7/13/15	Tue 7/14/15	Wed 7/15/15	Thu 7/16/15	Fri 7/17/15	Total
Railway Study/Gov. Railway Study			8.00		8.00			16.00
Holiday						8.00		8.00
Vacation				8.00				8.00
Regular			8.00	8.00	8.00	8.00		32.00
Overtime			0.00	0.00	0.00	0.00		0.00
Total			8.00	8.00	8.00	8.00		32.00

As in earlier versions, color coding in the cells indicates the work status for a given day:

Cell Color	Meaning	Cell Color	Meaning
Gray	Non-Work Day	White	Work Day (On Site)
Yellow	Holiday	Blue	Work Day (Off Site)
Green	Leave		
Red	Pending Leave		

Manage/Approve Timesheets Screen

To open the Manage/Approve Timesheets screen, click **Time » Timesheets » Approve Timesheet**.

If you are a supervisor, use this new screen to manage employee timesheets, or if you have proxy rights to create or sign timesheets on behalf of others, you can do so from this screen.

Although the Manage/Approve Timesheets screen is new, the functionality existed previously. In earlier versions, you clicked Search on the Global toolbar in the Timesheet application. The Search dialog box displayed the same fields that you will now see in the Approve Timesheets screen. Thus you will already be familiar with basic layout and functionality of this screen.

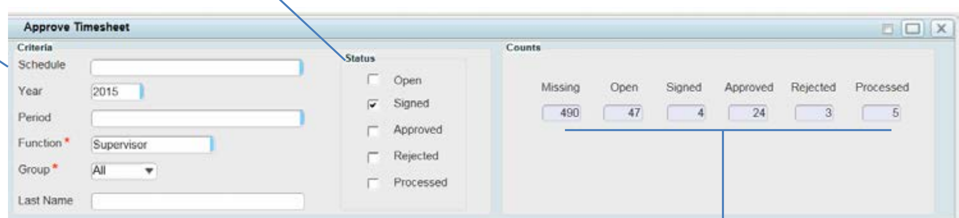
One key difference is that the Costpoint architecture allows for display of search results in Table view, allowing for easier and more efficient review and approval/rejection of timesheets. Once you have selected a timesheet record, the approval/rejection tasks are completed in much the same manner as in earlier versions.

The use and various states of this screen are illustrated in the two examples that follow below.

Example 1: Initial Default Values

(1.) Under **Criteria**, select search parameters. In this example, the results, which display under **Counts**, are for the entire year.

(2.) Under **Status**, select the timesheets you want to display. In the example below, only timesheets with a status of Signed will display, limiting the results to timesheets that are ready for approval.



(3.) This section displays the total number of timesheets by status. The totals are based on selections you made under **Criteria**. In this example, values shown are for the entire year.

(See Example 2 on next page.)

Example 2: Timesheets by Schedule, Period, and Status

In this example, **Schedule** and **Period Ending** are added to narrow the results.

Click to refresh the timesheet counts.

The **Open** status was also selected.

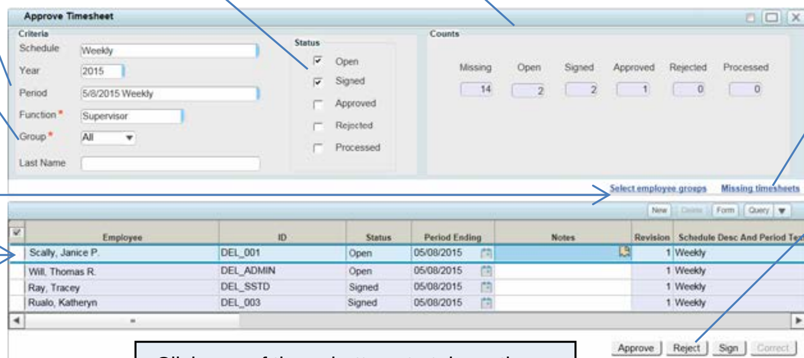
The updated counts are reflected below.

If All is selected in Groups, records all groups display. If you choose Selected, click the Select Employees Groups subtask to select the group.

Click this subtask to display missing timesheets. See "Create Missing Timesheets" below.

If you click **Reject**, a rejection explanation is required.

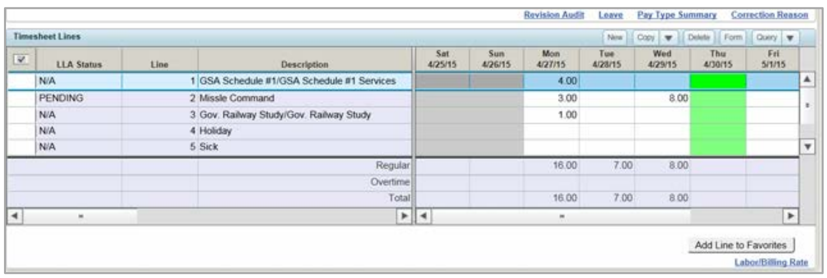
In Table view, the results display in list format. The timesheet for the selected employee displays below. I this example, the first row is selected.



Click one of these buttons to take action on the timesheet.

Based on timesheet status, one or more of these buttons may be disabled.

If you have rights and want to modify the timesheet, select the line to display the timesheet, or click **Sign** if you only need to sign it.



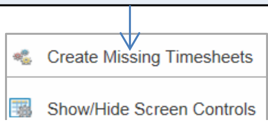
Correct is enabled only under certain conditions. Documentation for this feature is forth-coming

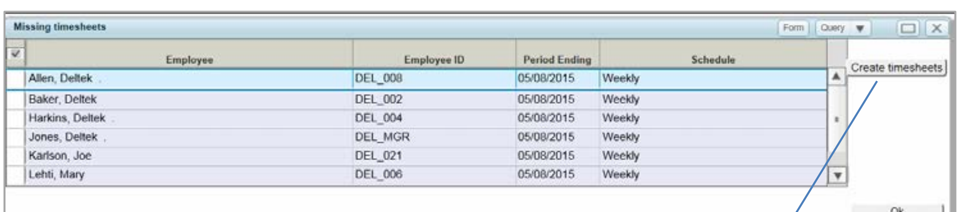
For information on entering timesheets, see Manage Timesheets on page 17.

Create Missing Timesheets

When you click the **Missing Timesheets** subtask, missing timesheets display in a separate table.

To create a timesheet, select the employee record, and right-click to display the short menu.





Or click the **Create Timesheets** button.

Additional Notes…

- After you create a timesheet, the status changes from Missing to Open. The record, therefore, no longer displays in the Missing Timesheets table.
- The numbers which display under **Count** are dynamically updated, so, for example, if you created three timesheets, **Missing** decreases by three, and **Open** increases by the same number.
- After you close the Missing Timesheets subtask, the timesheets you created display only if **Open** is selected under **Status**. You can, however, use the query function to search for the timesheet.

Timesheet Correction

Reversal and correction of processed timesheets was enhanced to include the following changes and improvements:

- A **Correct** button displays in the timesheet header. This button replaces the Reverse Timesheet toolbar icon available in earlier versions.

> The **Correct** button displays only when **Must Use Correct Timesheet** is selected in **Time » Time Controls » Manage Timesheet Classes**. The button remains dimmed on the timesheet until the status changes to *Processed*.

- Clicking **Correct** creates a reverse (negative) copy of the timesheet. This copy is hidden from the employee but exports along with the corrected version.

  In earlier versions, the Reverse Timesheet function added the negative (reversing) lines directly to the timesheet. These lines displayed in addition to the original positive lines, as well as the new correcting lines. So for example, a timesheet with only six original lines became an 18 line timesheet.

- If the timesheet status is *Processed*, but the period is closed, the following enhancements were made:
  - The button label changes to **Request Correction**.
  - Via workflow, the supervisor is notified of the correction request.
  - A Timesheet Correction Status screen was added that enables supervisors to approve/reject timesheet correction requests.
  - If the correction request is approved, the period is opened for the requesting individual only. In earlier versions, the period had to be opened for all employees.

Configure Timesheet Correction

To enable the **Correct** button on the timesheet form, click **Time » Time Controls » Manage Timesheet Classes** and select **Must Use Correct Timesheet**.

> This feature is configured by timesheet class, and is typically enabled for salaried employees whose wages are distributed across multiple job codes.

Correct a Timesheet in an Open Period

If the timesheet has a status of **Processed** and the period is open, the **Correct** button is enabled on the timesheet form.

When you click **Correct**, the following occurs:

- Lines on the timesheet change from read-only to editable.
- The status of the timesheet changes to *Open* if edits are made.
- The button label changes from **Correct** to **Undo Correct**, enabling the employee to revert to the original entries if necessary.
- A negative copy of the timesheet is created and stored for export.

After you sign the form, the corrected timesheet follows the standard workflow process.

Submit a Timesheet Correction Request

If the timesheet has a status of **Processed** but the period is closed, the **Request Correction** button is enabled on the timesheet form.

When you click **Request to Correct**, the following occurs:

- The Reason for Correction dialog box displays, where the employee provides a reason for the correction.
- Via workflow, the supervisor is notified of the request.

Manage Timesheet Correction Requests

If you are timesheet administrator, you are notified via workflow when an employee submits a timesheet correction request.

Use the new **Time » Timesheet Reports/Inquires » Timesheet Correction Status** screen to approve or reject the requests.

You can create additional workflow events to notify employees when requests are approved or rejected.

When you approve a request, the timesheet period is opened, but only for the employee who requested the correction. When the employee opens the timesheet, the **Correct** button is enabled.

Expense Module Application Changes

This section describes changes made to applications in the Expense module.

Overview of Changes by Menu Area

Refer to the tables below for an overview of changes made to applications within the Expense module. The tables are organized according to the version 10.0 menu structure. If a screen includes additional information within this document, a page number reference is included. Otherwise, refer to the online Help for additional information.

Expense Authorizations

Application	9.0.1 Path	Overview of Changes
Manage Expense Authorization	Plan Expenses » Expense Authorization	**Overview of Improvements** ▪ You can display the expense authorizations in Form view or Table view, which displays all the authorizations according to date. ▪ Customize table layout, including column size, order, hide/show, and sort. ▪ The Wizard buttons (Continue and Back buttons) no longer display. Instead, you can select any tab or section of the form, regardless of where you are in the add/edit process. ▪ Attachment subtask enables you to add upload attachments while creating the expense authorization. ▪ You can request advances from the Advance subtask. In earlier versions, you requested them during the signing process. ▪ Approval tasks (for managers and supervisors) are now completed from the new Approve Expense Authorization screen. **New Interface Elements** ▪ Details Tab — This tab displays additional fields that previously displayed on the Purpose. ▪ Void Tab — This tab displays based on permissions and all the rules for voiding are the same as earlier versions.
Approve Expense Authorization	N/A	This new screen enables managers to approve or reject expense authorizations.
Print Expense Authorization Report	N/A	This new report replaces print functionality previously available from the Expense Authorization Form.

Expense Reports

Application	9.0.1 Path	Overview of Changes
Manage Expense Report	Record Expenses » Expense Report	**Overview of Improvements** ▪ You can display the expense reports in Form view or Table view, which displays all the authorizations according to date. ▪ Customize table layout, including column size, order, hide/show, and sort. ▪ The Wizard buttons (Continue and Back buttons) no longer display. Instead, you can select any tab or section of the form, regardless of where you are in the add/edit process. ▪ Attachment subtask enables you to add upload attachments while creating the expense authorization. ▪ Approval tasks (for managers and supervisors) are now completed from the new Approve Expense Reports screen. **New Interface Elements** ▪ Details Tab — This tab displays additional fields that previously displayed on the Purpose. ▪ Void Tab — This tab displays based on permissions and all the rules for voiding are the same as earlier versions. **Other Changes of Note** ▪ Expense Report toolbar was replaced by action buttons that display on the form. The buttons, such as **Correct**, are always visible, but may be enabled or disabled based on current status. ▪ Some schedules were combined.
Approve Expense Authorization	N/A.	This new screen enables managers to approve or reject expense reports.
Print Expense Authorization Report	N/A.	This new report replaces print functionality previously available from the Expense Authorization Form.

Expense Reports/Inquiries

Report and Inquiry screens in the Expense module are more streamlined in version 10.0. In earlier versions, depending the screen, the report or inquiry results displayed on the Results tab, where you could preview or print.

In version 10.0, use the Print options on the Global toolbar to preview and print results. On inquiry screens, the results display in a table on the main screen. Since the report and inquiry screens are no longer tabbed, other fields, such as those relating to workflow notifications, have been consolidated on the main screen as well.

Before you begin using the reporting screens, review the "Report Output Options" section of the *Deltek Costpoint Interface Getting Started Guide*, and see "Basic Printing" video available in the Getting Started area of the Costpoint online help.

Application	9.0.1 Path	Overview of Changes
Outstanding Aging Report	Analyze » Outstanding Aging	▪ Notifications fields now reside on main screen. ▪ The **Execute** button has been replaced by options under .
Expense Authorization Status	Audit » Expense Authorization Status	▪ Notifications fields now reside on main screen. ▪ Use options under to send Notifications.
Expense Report Status	Audit » Expense Report Status	▪ Notifications fields now reside on the main screen. ▪ Use options under to send Notifications.
Commitments Inquiry	Audit » Commitment Inquiry/Report	The inquiry and report functions of the 9.0.1 Commitment Inquiry/Report screen were split into two separate screens. Use this screen to perform inquiry functions. Click on the Global toolbar to display inquiry results in the Commitments Inquiry Results table. See the online help for more information.
Print Commitment Report	N/A	This screen was added to replace the Commitments Inquiry reporting functions. Use options under on the Global toolbar to preview or print report results.

Batch Expenses

Application	9.0.1 Path	Overview of Changes
Manage Expense Batch Types	Settings » Batch Types	**Screen Changes** ▪ Amex and Visa Import options were combined on the Import Options tab. Fields on the screen are enabled or disabled based on Batch Type Code (Visa or Amex). ▪ Filter options for Amex are now located in the Filters subtask. ▪ Transaction Type filters for Visa are now located in the Transaction Type Filter subtask. ▪ Filter Value fields for Visa are now located in Wizard Type Identification subtask.

Application	9.0.1 Path	Overview of Changes
		▪ Identification values for Ghost Card are now located in a separate subtask.
Manage Batch Expense	Process » Maintain Imported Expenses	The basic functionality of this screen is unchanged. However, since the Wizard entry model is no longer supported, you are no longer required to enter batch expense information in a particular order. In Form view, for example, the wizard pages have been replaced with tabs as follows: ▪ General tab — Fields on this tab resided on the first wizard page in earlier versions. ▪ Amounts tab — Fields on this tab resided on the second wizard page in earlier versions. ▪ Details tab— Fields on this tab enabled or disabled based on Wizard type. The fields were located on the third wizard page in earlier versions, and also varied by wizard type. To import expenses, open the Import Expenses subtask. ▪ File Location and File Name are new fields. ▪ Click the **Import** button on this subtask to import files or click on Global toolbar. ▪ Subtasks accessed from this screen are: Import Errors Dialog and Import Errors Dialog.

Expense Interfaces

Application	9.0.1 Path	Overview of Changes
Export ERs/Advances	Process » Export ERs/Advances	▪ New fields: File Location and File Name. ▪ Check boxes for selecting report options were added to the main screen. ▪ Use options under to refresh group or class selections or to print/export results.
Export Commitments	Process » Export Commitments	▪ Click in File Location to select export location. ▪ The Preview/Print buttons have been replaced by options under on the Global toolbar. ▪ The **Process** button has been replaced by on Global toolbar. ▪ The **Export** button has been replaced by on Global toolbar.

Application	9.0.1 Path	Overview of Changes
Compute Commitments	Process » Compute Commitments	The **Execute** button has been replaced by  on the Global toolbar.

Expense Controls

Application	9.0.1 Path	Overview of Changes
Configure Expense Settings	Settings » Expense Configuration	**UDT Options** ▪ Now a subtask instead of a tab. ▪ Signature/Approval Task is now a separate subtask. ▪ Aging Option is now a separate subtask. **Export Options Tab** ▪ **Export Filter** and **Export** have been removed from this tab and now reside in the UDT Options subtask table. **Miscellaneous Tab** The following fields are new to the screen but previously displayed on the Domain Detail screen in the Technical Console: ▪ Receipt Storage Location ▪ Traveler Location ▪ Traveler Reject Location ▪ Image Examine Level (was Traveler Examination Level)
Manage Currencies	Expense » Settings » Currencies	No changes of note.
Manage M&IE Breakdown	Settings » M&IE Breakdown	No changes of note.
Manage Providers	Settings » Providers	Visa Suppliers Name is now a subtask instead of a tab.
Manage Expense Charge Types	Settings » Charge Types	New **Add Details** button. For new charges, click **Add Details** to add expense charge type details to the table window.
Manage Pay Methods	Settings » Pay Methods	No changes of note.

Application	9.0.1 Path	Overview of Changes
Manage Currency Schedules	Settings » Currency Schedule	▪ Tabs are consolidated and streamlined to display as a single screen. ▪ You can enter or edit exchanges rates directly in the Exchange Rates table.
Manage Per Diem Schedules	Settings » Per Diem Schedules	▪ Tabs are consolidated and streamlined to display as a single screen. ▪ You can enter or edit schedules directly in the Schedule table instead. ▪ Click the Meal & Incidental subtask to view additional data for line selected in the table.
Manage Tax Schedules	Settings » Tax Schedules	▪ Tax Schedules Rates tab has been converted to a subtask. ▪ Tax Schedule Labels now displays as a separate table element at the bottom of the main screen.
Manage Expense Types	Settings » Expense Types	**Basic Information Tab** ▪ New fields: 1099 Type, Relocation Code, W-2 Code. ▪ Over-Ceiling text box has been moved to User-Defined Labels & Text subtask. **Input Options Tab** ▪ Label changed to Input Options – Required Fields. ▪ Fields for all wizard types display and are enabled or disabled based on selected Wizard Type. ▪ The User-Defined Values table has been converted to a subtask. **Other Screen Changes** ▪ Multiple tabs were converted to subtasks. ▪ The User Defined tab has been converted to three separate subtasks, which correspond to labels entered for values 1-3 in the User-Defined Labels & Text subtask.
Manage Expense Report Types	Settings » Expense Report Types	**Basic Information Tab** ▪ Fields that were on the Basic Information tab now reside under **Basic Information** on the main screen. ▪ The Label fields under User-Defined Values have been relocated to the User-Defined Values – Labels subtask. **Other Screen Changes**

Application	9.0.1 Path	Overview of Changes

		▪ Tabs were converted to subtasks.
		▪ Tables on the Expense Authorization tab were split into two separate subtasks:
		    ▪ Expense Authorization Tasks – Authorization
		    ▪ Expense Authorization Tasks - Advance
		▪ The User Defined tab was converted to three separate subtasks, which correspond to labels entered for values 1-3 in the User-Defined Labels & Text subtask.

Manage Expense Classes	Settings » Expense Classes	**Basic Information Tab** ▪ The Advance Request field has been removed. ▪ Costpoint Charge Lookup options are currently not supported pending future improvements. **Other Screen Changes** Expense Report Types and Pay Method tabs were converted to subtasks.

Expense Utilities

Application	9.0.1 Path	Overview of Changes
Clear Expense Reports	Utilities » Clear Expense Reports	The **Execute** button has been replaced by on the Global toolbar.
Clear Expense Authorizations	Utilities » Clear Expense Authorizations	The **Execute** button has been replaced by on the Global toolbar.
Maintain Expense	Utilities » Expense Utility	The **Purge** button has been replaced by on the Global toolbar.
Advance Utility	Utilities » Advance Utility	No changes of note.
Maintain Payment	Utilities » Payment Utility	No changes of note.
Change Expense Report/Advance Status	Utilities » Change ER/Advance Status	▪ The **Execute** button label was changed to **Update**. ▪ Click on the Global toolbar or **Refresh Groups** to update group selections if you change the criteria.

Application	9.0.1 Path	Overview of Changes
Bar Code Processor	N/A.	This is a new screen that enables administrators to manually run the Bar Code Processor.

Other Changes of Note

- Per Diem Preprocessor — This application is no longer supported.

Manage Expense Authorizations

Detailed content pending.

Approve Expense Authorizations

To open the Approve Expense Authorizations screen, click **Expense » Expense Authorizations » Approve Expense Authorizations**.

If you are a supervisor, use this new screen to manage employee expense authorizations, or if you have proxy rights to create or sign expense authorizations on behalf of others, you can do so from this screen.

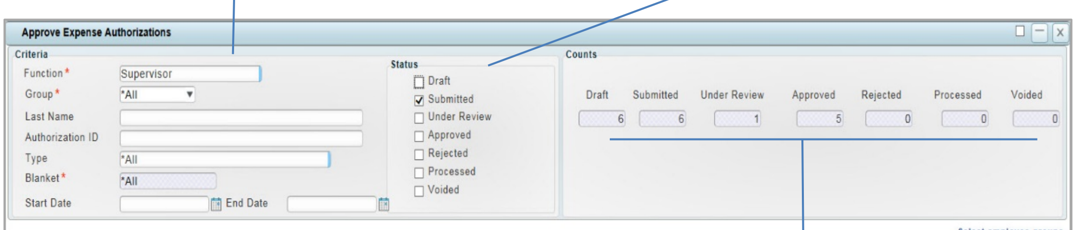
Although the Approve Expense Authorizations screen is new, the functionality existed previously. In earlier versions, you clicked Search on the Global Toolbar in the Expense Authorization application. The Search dialog box displayed the same fields that you will now see in the Approve Expense Authorizations screen. Thus you will already be familiar with basic layout and functionality of this screen.

One key difference is that the Costpoint architecture allows for display of search results in Table view, allowing for easier and more efficient review and approval/rejection of expense authorizations. Once you have selected an expense authorization, the approval/rejection tasks are completed in the same manner as in earlier versions. The only difference is that in Version 10 you click Workflow subtask to display the Workflow section of the screen. The use and various states of this screen are illustrated in the two examples that follow below.

Example 1: Initial Default Values

(1) Under **Criteria**, select search parameters to narrow your search results.

(2.) Under **Status**, select the expense authorizations you want to display. In the example below, once you click , only expense authorizations with a status of Submitted will display in the Manage Expense Authorization table directly below.



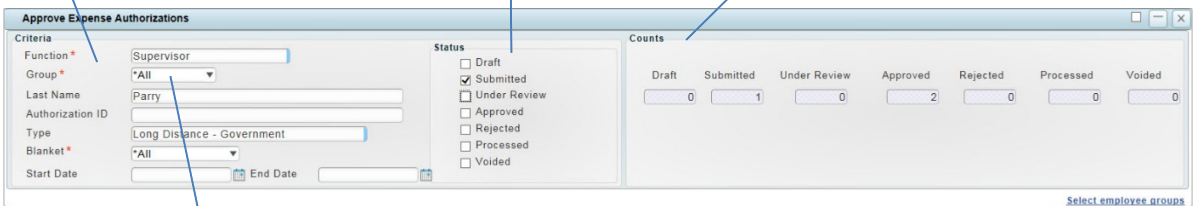
(3.) This section displays the total number of authorizations by status category.

Example 2: Expense Authorizations by Last Name, Type, and Status

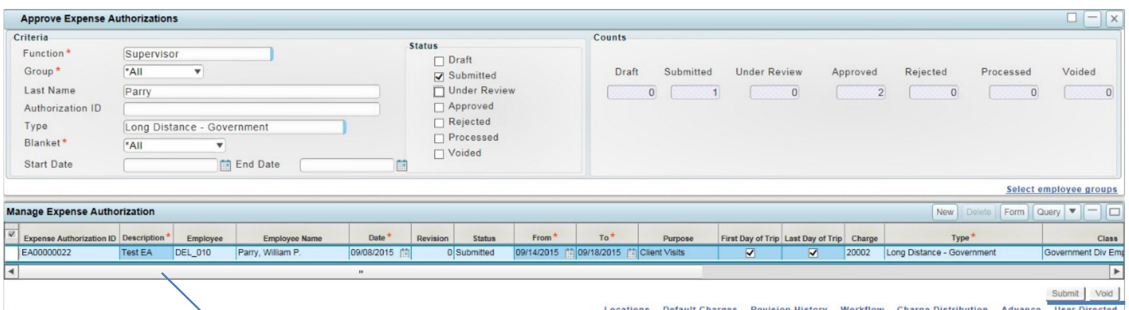
In this example, **Last Name** and **Type** are added to narrow the results. Click ⚡ to refresh the expense authorization counts.

The **Submitted** status was also selected as a filter.

The updated totals for each status category display in the **Counts** section.



If All is selected in Groups, records for all groups display. If you choose Selected, click the Select Employees Groups subtask to select the group.



In Table view, the filtered results set display in list format. In this example, there is just one Submitted authorization available to view.

Buttons display and are enabled or disabled depending on the status of the expense authorizations.

Manage Expense Reports

Detailed content pending.

Approve Expense Reports

The Approve Expense Report application is new for Version 10. To display the screen, click **Expense » Expense Reports » Approve Expense Reports**.

If you are a supervisor, use this new screen to manage your employees' expense reports, or if you have proxy rights to create or sign expense reports on behalf of others, you can do so from this screen.

Although the Approve Expense Reports screen is new, the functionality existed previously. In earlier versions, you clicked Search on the Global Toolbar in the Expense Report application. The Search dialog box displayed the same fields that you will now see in the Approve Expense Reports screen. Thus you will already be familiar with basic layout and functionality of this screen.

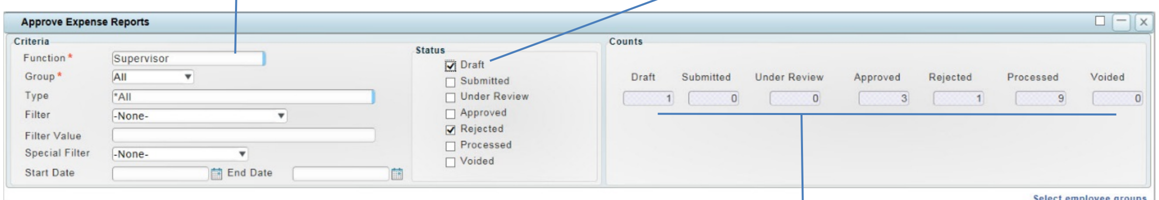
One key difference is that the Costpoint architecture allows for display of search results in Table view, allowing for easier and more efficient review and approval/rejection of expense reports. Once you have selected an expense report, the approval and rejection tasks are completed in the same manner as in earlier versions. The only difference is that in Version 10 you click Workflow subtask to display the Workflow section of the screen.

The use and various states of this screen are illustrated in the two examples that follow below.

Example 1: Initial Default Values

(1) Under **Criteria**, select search parameters to narrow your search results.

(2.) Under **Status**, select the expense report categories you want to review. In the example below, once you click , only expense reports with Draft and Rejected statuses will display in the table directly below.



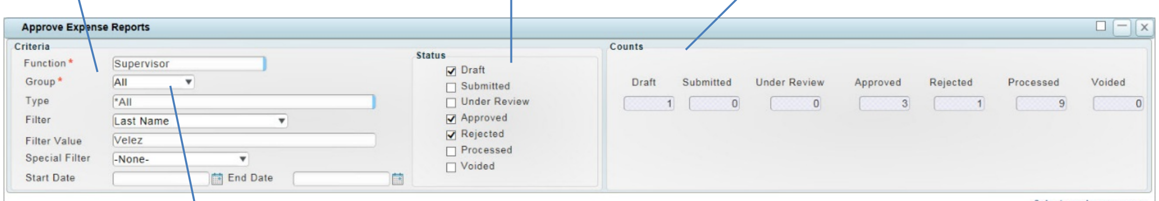
(3.) This section displays the total number of authorizations by status category.

Example 2: Expense Reports by Last Name and Status

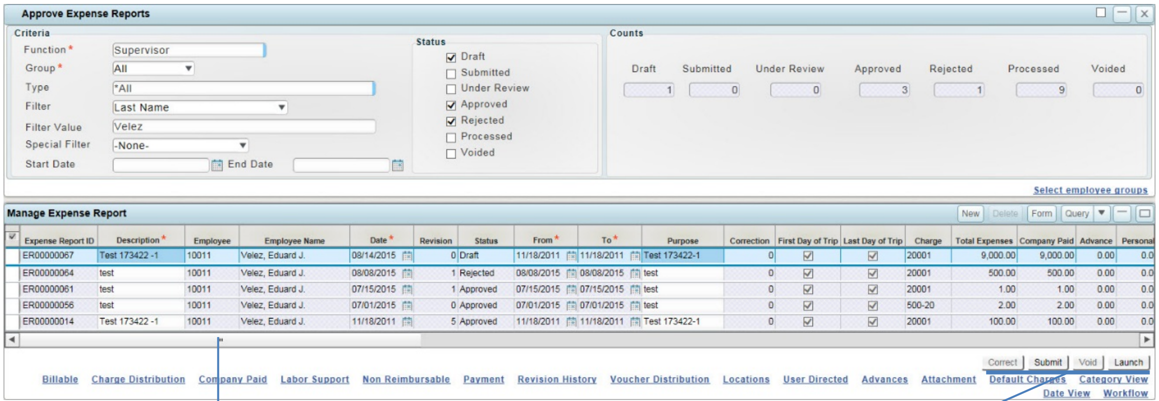
In this example, the filter **Last Name** is added to narrow the results. Click to refresh the expense report counts.

Three status categories were also selected.

The updated totals for each status category display in the **Counts** section.



If All is selected in Groups, records for all groups display. If you choose Selected, click the Select Employees Groups subtask to select the group.



In Table view, the filtered results set displays in list format. In this example, there are five records that match the filter criterion of Last Name, and the statuses of Draft, Approved, and Rejected.

Buttons display and are enabled or disabled depending on the status of the expense authorizations.

Configuration Module Application Changes

This section describes changes made to applications in the Configuration module.

Screens in the version 10.0 Configuration module existed in the Administration module in version 9.x.

Overview of Changes by Menu Area

Refer to the tables below for an overview of changes made to applications within the Configuration module. The tables are organized according to the version 10.0 menu structure. If a screen includes additional information within this document, a page number reference is included. Otherwise, refer to the online Help for additional information.

General Controls

Application	9.0.1 Path	Overview of Changes
Configure General Settings	Administration » Product Configuration » General Configuration	Many settings and functions controlled from this screen are now managed through Costpoint, most often in screens located within the Administration module. In the screen header, click in **Locale (Country/Language)** to change the locale, if more than one exists, and then click **Load Defaults** to refresh the screen data. In earlier versions, you clicked the Search icon on the toolbar to change the locale. **General Options Tab** Fields removed: ▪ All password settings except for Allow PIN use on Mobile device were removed. ▪ Show Menu check box was removed. ▪ Row Settings fields were removed. Fields added: ▪ Authentication Method — Select the method you use to authenticate user logins. If you select Database, the Email field on the Configuration >> Resources >> Manage Resource Information screen must contain a valid email address. **UDT Options Tab** The UDTs table section of the tab is now the UDT Labels subtask. Note, however, that you now modify UDT labels from the Administration >> System Administration >>

Application	9.0.1 Path	Overview of Changes
		Workspace Customization >> Manage Standard Label Customizations screen **Miscellaneous Tab** Fields/Sections removed: ▪ Show Employee ID ▪ Show Employee ID in Workflow ▪ The User-Defined Labels section was converted to a subtask. ▪ The Attachments section was converted to a subtask. Fields/Sections added that were previously located in the Technical Console: ▪ Export Location – Enter the location where all export files will be stored. ▪ Import Location – Click to select the location where all import files will be stored. ▪ Trash Location – Click to select to select the location where all trash files will be stored. ▪ Custom Stored Procedures – Enter the names of custom stored procedures. **Other Changes** The Charge Lookup Options tab was removed. This was used in conjunction with Costpoint Direct Lookup, which is currently de-supported pending future improvements.
Manage Account Types	Administration » Product Configuration » UDT 01 Types	No changes of note.
Manage Resource Group Types	Administration » Product Configuration » Employee Group Types	No changes of note.

Resources

Application	9.0.1 Path	Overview of Changes
Manage Resource Information	Administration » Users and Groups »	All the tabs, except for Charge Favorites (removed), were converted to subtasks and fields previously on

Application	9.0.1 Path	Overview of Changes

	Employee Information	the Basic Information tab now display on main screen.
		
		Other changes to Basic Information include the following:
		
		- Access table is now a separate subtask.
		
		New Fields
		
		- Active Directory –
		- Resource Type – Select either Employee or Subcontractor.
		- Email field – Was located on the Miscellaneous tab. This field is required when Database is selected as the Authentication method in Configure General Settings.
		- Costpoint Vendor fields (new for Subcontractor Management):
		  - Costpoint Vendor Employee ID – Enter up to a 20-character, alphanumeric ID that will be used for the Subcontractor Employee interface.
		  - Costpoint Vendor Email – Enter the subcontractor's Email address.
		- Create User Account button – When you add a new record, the subtasks are not enabled until you click this button. Previously, you had to click Save.

Manage Resource Groups	Administration » Users and Groups » Employee Groups	All the tabs, except for Charge Favorites (removed), were converted to subtasks and fields previously on the Basic Information tab now display on main screen. There were otherwise no changes of note made to this screen.
Manage Security Roles	Administration » Users and Groups » Security Roles	In version 10, the User groups assigned to the user control the application menu options. Therefore, security roles are now associated with one more user groups, and by extension, granted access to the Time and/or Expense modules. Screen changes include the following: - Addition of a User Groups subtask, where you assign module rights to the selected user group based on the selected Security Role. - Security is assigned at the module level. You can no longer assign rights at the application level.

Application	9.0.1 Path	Overview of Changes
		See the Deltek Time & Expense Post-Installation Configuration Guide for more information on implementing this change prior to users logging on.
Manage Functional Roles	Administration » Users and Groups » Functional Roles	No significant changes.
Manage Preferences	You clicked on the Global Toolbar.	Click Time & Expense » Configuration » Resources » Manage Preferences. Time and Expense tabs have been removed but some functionality has been replaced by Costpoint features. For example, to specify which application will first display by default when you log in: 1. In My Menu, click **Manage My Menu**. 2. From the My Menu Application List, copy the application code for the application you want to display upon logging in to Time & Expense. 3. Exit Time & Expense. 4. On the Login Screen, click Additional Criteria. 5. Paste the code in the **Application** field. 6. Select the **Remember Log in Information** check box.
Manage Desktop	This is on the Home Page.	Screen changes include the following: ▪ Pending tasks display in new Tasks and Task Details tables. ▪ The My Timesheets section no longer resides on the screen. Instead, open Time » Timesheets » Manage Timesheets and use Table view to list all of your timesheets. ▪ The Alerts section has been removed. ▪ MyMenu no longer resides on this screen. It has been replaced with Costpoint's My Menu feature on the Navigation toolbar. See page 44 for more information.
Manage Resource Licenses	Administration » Users and Groups » Password Utility	Screen changes include the following: ▪ Fields and tabs have been consolidated to a single screen.

Application	9.0.1 Path	Overview of Changes
		▪ The **Execute** button has been replaced by on Global toolbar. The results display in the Resources table on the main screen.

Master Data

Application	9.0.1 Path	Overview of Changes
Maintain Charge Trees	Maintain Charge Trees	This application functions the same way as it did in earlier versions, except that the Add/Edit dialog boxes were replaced by subtasks. The Restrictions tab was replaced by the following subtasks that display on the main screen: ▪ Tree Restrictions ▪ Branch Restrictions ▪ Charge Restrictions
Manage UDT01	Manage UDT01	Tabs are now subtasks and there are separate subtasks for adding direct links and wild card links. Otherwise, no changes of note.
Manage UDT02	Manage UDT02	Tabs are now subtasks and there are separate subtasks for adding direct links and wild card links. Otherwise, no changes of note.
Manage UDT03	Manage UDT03	Tabs are now subtasks and there are separate subtasks for adding direct links and wild card links. Otherwise, no changes of note.
Manage UDT04	Manage UDT04	No changes of note.
Manage UDT05	Manage UDT05	No changes of note.
Manage UDT06	Manage UDT06	No changes of note.
Manage UDT07	Manage UDT07	There are separate subtasks for adding direct links and wild card links. Otherwise, no changes of note.
Manage UDT08	Manage UDT08	No changes of note.
Manage UDT09	Manage UDT09	There are separate subtasks for adding direct links and wild card links. Otherwise, no changes of note.

Application	9.0.1 Path	Overview of Changes
Manage UDT10	Manage UDT10	No changes of note.
Manage UDT11	Manage UDT11	No changes of note.
Manage UDT12	Manage UDT12	No changes of note.
Manage UDT13	Manage UDT13	No changes of note.
Manage UDT14	Manage UDT14	No changes of note.
Manage UDT15	Manage UDT15	No changes of note.

Interfaces

Application	9.0.1 Path	Overview of Changes
Import Master Data	Administration » Process » Import Console	The Log tab was removed and is replaced by the Master Data Import screen. The **Execute** button has been replaced by  on Global toolbar.
Master Data Import History	This was previously the Log tab of the Import Console screen	Some fields are obsolete due to the new framework while others have been added.

Other Changes of Note

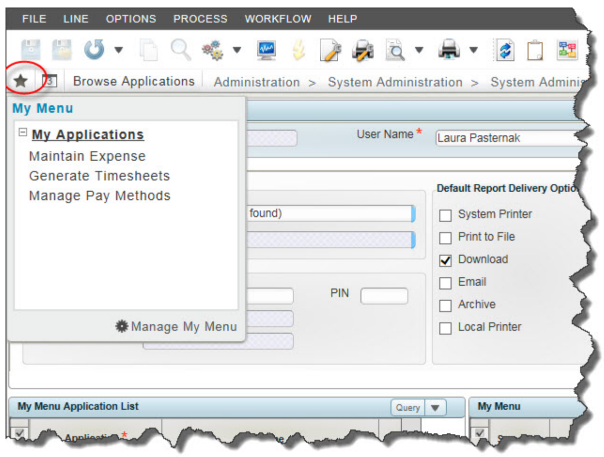
- Custom Text — This application has been discontinued.
- Recurrence Codes — This application has been discontinued.
- Scheduling — This application has been replaced with Costpoint functionality.

Manage MyDesktop

In 9.0.1, the MyDesktop screen displayed by default when you logged into Time & Expense. For Version 10.0, click **Time » Configuration » Resources » Manage MyDesktop** to display the screen.

You can still use this screen to view pending tasks related to timesheets, expense reports, and expense authorizations and launch the necessary applications to carry out these tasks directly from this screen. However, note the following changes:

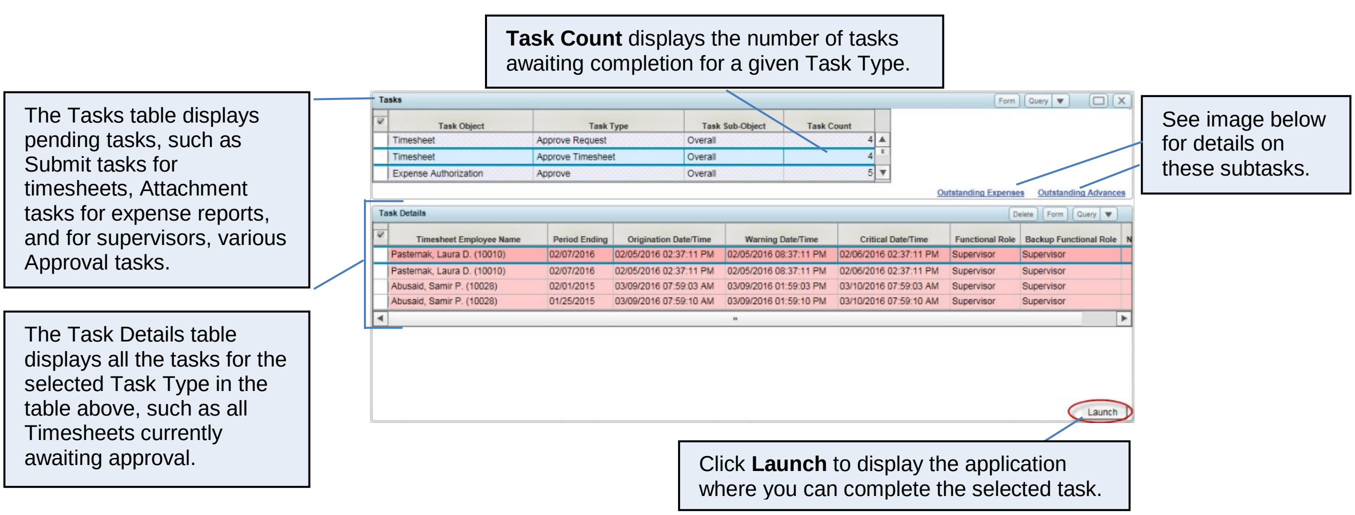
- The My Timesheets section no longer resides on the screen. Instead, open **Time » Timesheets » Manage Timesheets** and use Table view to list all of your timesheets.
- The Alerts section has been removed.
- MyMenu no longer resides on this screen. It has been replaced with Costpoint's My Menu feature on the Navigation toolbar:



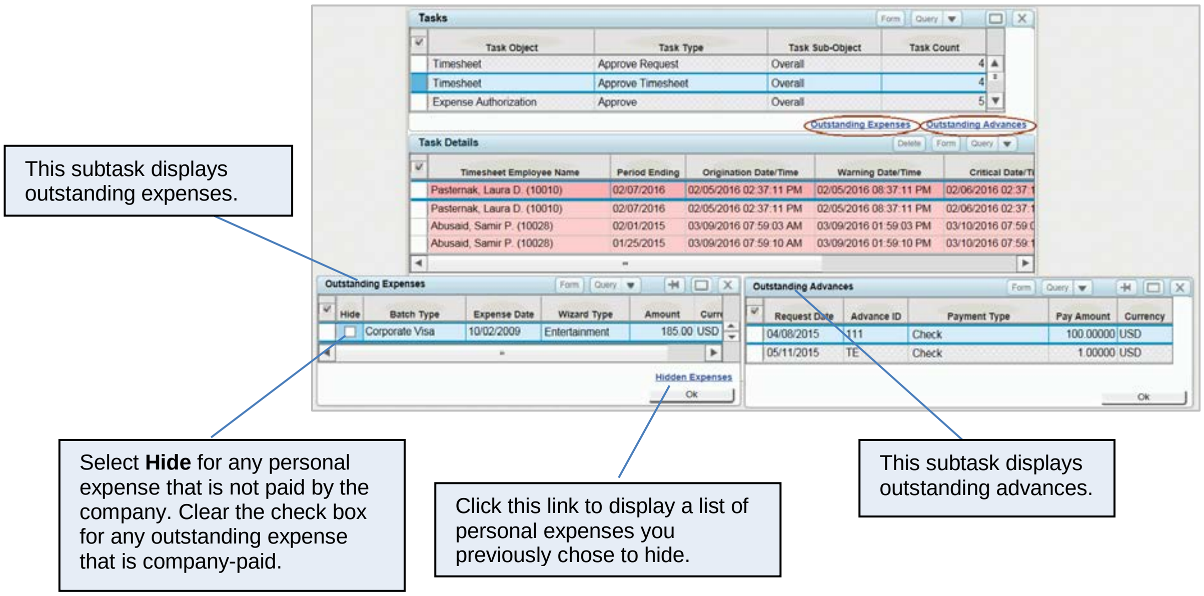
For more information on My Menu functionality, see the Navigation Toolbar section in the Costpoint Getting Started Guide.

The Manage MyDesktop screen contains two tables:

- Tasks Table — The Tasks table lists all the open tasks that the user needs to perform. Information categories tracked in a task include Task Object, Task Type and Task Count.
- Task Details Table — Below the Tasks table is the Task Details table. The information displayed here depends on the task highlighted in the Tasks table.



- Outstanding Advances – This subtask displays the user's outstanding advances. As the user claims the advances in the Expense Report screen, they are deleted here.
- Outstanding Expenses – This subtask displays 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.



Administration Domain

Deltek Time & Expense 10.0 is built on the Deltek Costpoint platform, and as such, it includes much new functionality related to the Costpoint framework.

Refer to the *Deltek Time & Expense 10.0 Administration Guide* to learn more about administrative tasks and procedures required to manage the software.

Time & Expense 9.0.1 also included an Administration module. In version 10.0, those screens now exist within the Configuration module.

For Additional Information

Customer Care Connect Site

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

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

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

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

Access Customer Care Connect

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

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

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

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