




Deltek

Deltek Time & Expense™

Post Installation Configuration Guide

September 14, 2020



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Overview

Welcome to the Time & Expense 8.0 Post-Installation Configuration guide. The procedures described in this guide should be completed after Time & Expense 8.0 is fully installed but before employees access the software.

This guide is for customers who have upgraded from version 9.x.

Post Upgrade Configuration

To finalize the upgrade to Time & Expense 8.0, you must perform the 12 steps described in this document in the order presented.

The following list provides a brief description of the more important steps within this process:

- **Verify Time & Expense User Security** — Because Time & Expense and Costpoint are deployed as one product, with this upgrade we converted the Time & Expense 9.x security role to the Costpoint user group security. For this reason, you should review the user groups the upgrade created during the upgrade process.
- **Configure New Features** — Time & Expense 8.0 contains several new features that require configuring, including features for enhanced timesheet correction and timesheet preset revision explanation.
- **Grant Access to Time & Expense** — Time & Expense and Costpoint are deployed as a single product, administrators must first set up Costpoint IDs for Time & Expense users and sync existing Costpoint users with Time & Expense.
- **Set Up Scheduled Processes** — As Time & Expense utilizes Costpoint's Job Server for scheduled processes, administrators must create new parameters for scheduled applications along with jobs created on Job Server.

□ Step 1 — Log In to Costpoint (Time & Expense)

Log in to Time & Expense 8.0 as CPSUPERUSER.

□ Step 2 — Review Costpoint Security (User Groups)

During installation, user groups are created and users are assigned to them based on their security role assignments in version 9.x. In this step, you will ensure that the user group assignments are correct.

For example, if a Time & Expense 9.x user has a security role of EMPLOYEE which grants access to the Timesheet and Expense Report screens, the upgrade will create two User Groups:

- TM_EMPLOYEE — This User Group will provide access to Timesheet.
- EP_EMPLOYEE — This User Group will provide access to Expense Reports.

The upgrade will also link both User Groups with the EMPLOYEE Time & Expense Security Role, so if user access is changed in Time & Expense (Security Role or Seat License), the user will be assigned to the correct user groups.

For new users, Time & Expense uses Security Role and Seat License information to assign them to the correct User Groups and thus provide proper menu access.

Note: Although you can grant access to Employee Self Service (ESS) from **People » Employee » Basic Employee Information » Manage Employee Information**, the conversion will also create user groups for ESS screen access. In the example above, if the EMPLOYEE role in 9.x had access to ESS screens, a user group of ES_EMPLOYEE would be created.

To review user groups and associated menu assignments, complete the following steps:

1. Click **Administration » Security » System Security » Manage User Groups**.
2. In User Groups, select the group you want to review.
3. Click the **Application Rights** subtask.

The screenshot shows the 'Manage User Groups' application. The main window has a table with columns: User Group ID, Name, and Active Directory ID (sAMAccountName). The table lists several user groups, including 'TFS', 'ALL', 'CER__ACCTG', 'CER__ACCT_ALL_SECURE', 'CER__ADMIN', and 'CER__ADV'. Below the table are tabs for 'Assign Users to Group', 'Module Rights', 'Application Rights', 'Active Directory Groups', and 'UI Profiles'. The 'Application Rights' tab is selected, and a pop-up window titled '> Application Rights' is open. This pop-up window has columns for Application, Name, and Application Rights. It lists applications such as 'AOPUTLAP', 'AOPUTLVU', and 'APMACCT' with their respective names and rights (Full). A 'Close' button is at the bottom right of the pop-up window.

As you perform your review, take note of the following:

- Current Time & Expense menus do not completely align with Time & Expense 9.x.

- Supervisory functions (for example, approving timesheets) associated with timesheets and expense reports/authorizations were separated into the following new screens:
 - Manage/Approve Timesheets
 - Manage/Approve Expense Reports
 - Manage/Approve Expense Authorizations

You should carefully review user groups for the above screens to determine which groups should or should not have access to them.

Note If users have access to the Manage/Approve Timesheet application, but they do not have any employee groups where they can at least view timesheets, timesheets will not display in the application. The same is true for the Manage/Approve screens in Expense.

- Print functions in the Expense module were separated into the following new screens:
 - Print Expense Report
 - Print Expense Authorization Report
- My Desktop and Preferences are menu selections in the new version. All user groups created are granted rights.

□ Step 3 – Create Time & Expense Administrator User Account

This step is required only under the following conditions:

- You are implementing a standalone deployment of Time & Expense.
- You are implementing a shared deployment of Time & Expense with Costpoint 7.1.1, and the Time & Expense administrator is not currently set up as a user in Costpoint 7.1.1.

To create a user account for the Time & Expense Administrator, complete the following steps:

1. Click **Administration » Security » System Security » Manage Users**.

2. In the Identification section, enter the following information:

Column	Description
User ID	Enter the current Time & Expense login ID for the Time & Expense administrator
User Name	This is required for standalone deployments of Time & Expense. For shared deployments where the Time & Expense administrator is an employee in the Costpoint employee table, this field will automatically populate when the Employee ID is provided. If the Time & Expense administrator is not an employee, you must enter a name.
Email	Provide an e-mail address for the user if it is not provided by Costpoint based on the employee ID.
Default Company	Assign the user account to the appropriate default company. This is mostly needed for Costpoint, it is therefore is required for Time & Expense.

Step 3 – Create Time & Expense Administrator User Account

3. In the Information tab, provide the following information:

- **Authentication Method** – Select the authentication method for the Time & Expense administrator account.

Password/Verify Password – If the authentication already exists in the database, provide the initial password that the account will use. This is unnecessary if Time & Expense will co-deploy with Costpoint, since SMTP would be setup and the system will send e-mail to the administrator.

4. In the Company Access subtask, add one row assigning user access to Costpoint Company 1.

- **Company ID** – Click to select Company 1.
- **Default Taxable Entity ID** – Click to select the appropriate default Taxable Entity.

5. Click **Save**.

Company ID *	Default Taxable Entity ID	Org Security Group ID	Suppress Labor	Suppress SSN	Suppress Cost	Suppress Price	Suppress AP Tax ID	Company Name	Org Security Group Name
ENSCO			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ENSCO, Inc	

□ Step 4 — Grant Time & Expense Administrator Rights

Before completing the remaining steps, ensure that your primary administrator account is assigned to the correct user groups. For example, if you have a security role of ADMIN Time & Expense, the upgrade process creates the following user groups:

- TM_ADMIN — Administrator screen rights for Deltek Time
- EP_ADMIN — Administrator screen rights for Deltek Expense

To assign Time & Expense Administrator User Groups to the Primary Administrator, complete the following steps:

1. Click **Administration » Security » System Security » Manage Users**.
2. Query to find the particular Admin Account.
3. Open the Assigned User Groups Subtask.

The screenshot shows the 'Manage Users' interface in Deltek Costpoint. The 'Assigned User Groups' subtask is open, displaying a table with columns: User Group, User Group Name, and Company. A red box highlights the 'New' button in the top right corner of the subtask, and a red arrow points to it from the 'New' button in the top right corner of the main window.

4. Add the appropriate Time & Expense Admin group. Based on the example above, if you are only licensed for Deltek Time you would only assign TM_ADMIN. If you are also licensed for Deltek Expense or Employee Self Service, you would add those as well.
5. Click **Save**.
6. Log out and log back in.

Note: This step only needs to be performed for one administrator. In a later step, all remaining user accounts will be created in a mass action.

Step 5 — Create Alternate File Locations

In Time & Expense 9.x, file directories were configured within the Technical Console. In this latest version of Time & Expense, they are replaced by alternate file locations.

In this step, you will set up the alternate file locations for the Export Location, Import Location, and Trash Location and various Expense Attachment Locations.

To add alternate file locations, complete the following steps:

1. Click **Administration » System Administration » File Management » Manage Alternate File Locations**.

Alternate File Location ID *	Name *	URL/Folder	Content Type	Content Type Description	CMS Location	CMS ID	CMS Name
&^OHHIHH-09-9-090-90-9090-	test test test test	\\makd-dmanibog\PAYROLLchuva					
01CATHY-000000000000000000000001	Cath's Alternate File Location	\\Makfsp5\Costpoint\QE\ACPJ BNP\ACPJ\					
01_GAVIN_MAIELLA_ALT_LOCATION1	01_GAVIN_MAIELLA_ALT_LOCATION1	\\MAKLELATINAJA1\New Folder\Regressi					
444830	jean	\\MAKLASORIA1\Sample\444830					
AAPOSTOL	AAPOSTOL	\\makfsp3\costpoint\Dev\Peer Review\Ar					
ABBY	ABBY	\\as100293\Share\ALTLOC					
ABBY2	ABBY	\\as100293\Share\ALTLOC\TRASH					
ACA	ACA XML File	\\AS100841\Users\ErikaYu\Desktop\Deltek					

User / User Group *	Name	Company *
ALL	Permit full access all modules	ALL

2. Create the following locations:
 - Time or Expense:
 - Export Location** — This is the location where timesheets, expense reports, and advances are exported.
 - Import Location** — This is the location where master data is dropped off for import into Time & Expense (ASCII and XML).
 - Trash Location** — This is the location where master data files (ASCII and XML) are moved after import.
 - Expense (if applicable):
 - Receipt Storage Location** — This is the location where Expense Report and Expense Authorization attachments are stored.
 - Traveler Location** — This is the location where attachment travelers can be dropped off for the automatic attachment to expense report or expense authorization.
 - Traveler Reject Location** — This is the location where attachment travelers that are rejected during automatic attachment to expense report or expense authorization are moved.

For each of the locations, you will need to add the appropriate user groups that would need access. For example, access to the Export, Import, and Trash locations would be needed by any

Step 5 — Create Alternate File Locations

user groups that runs integration between Costpoint and Time & Expense. For expense locations, it should be granted to all expense user groups that needs to attach and view expense attachments.

Note: Refer to the [Costpoint Online Help](#) for details on the Manage Alternate File Locations screen.

□ Step 6 – Configure Alternate File Locations and Default Authentication Method

To configure alternate file locations and set a default authentication method, complete the following steps:

1. Click **Time & Expense » Configuration » General Controls » General Settings**.
2. Click the **General Options** tab.

The screenshot shows the 'General Settings' form in Deltek Costpoint. The 'General Options' tab is active. The 'Notification Method' dropdown is highlighted with a red box and set to 'Email'. Other fields include 'Locale (Country/Language)' as 'US/en', 'Description' as 'United States/English', 'TEAccount Type Code' as 'Direct Labor', 'Employee Security Role' as 'RSI MANAGERS SECURITY ROLES', 'Subcontractor Security Role' as 'Shop Workers TS only', 'Date Edit' as 'Soft Edit', 'Currency' as 'US Dollar', and 'Time Zone' as 'Eastern Standard Time (America/New_York)'.



Select options for the following new fields:

Field	Description
Notification Method	Change the Notification Method to Email since alerts are no longer created in Time & Expense.

3. Click the **Miscellaneous** tab.

Step 6 — Configure Alternate File Locations and Default Authentication Method

- Under **Imports**, select values in the following fields:

Field	Description
Import Location	Click  to select the alternate file location for the import directory.
Trash Location	Click  to select the alternate file location where all trash files will be stored.

- If you are an Expense client, click **Time & Expense » Expense » Expense Controls » Expense Settings**.
- Click the **Miscellaneous** tab.

Step 6 — Configure Alternate File Locations and Default Authentication Method

The screenshot shows the 'Expense Settings' window in Deltek Costpoint. The 'Miscellaneous' sub-tab is selected. The 'General' section contains the following fields and options:

- Foreign Reimbursement *: Actual
- Header UDT *: UDT02
- AP Invoice Date *: Expense Report Date
- Last Expense Report Number *: RSISY70715
- ☒ Allow Unauthorized Charges
- ☒ Allow User Override of UDT09CS in Expense Wizard
- ☒ Allow UDT09CS entry in General Wizard
- ☒ Allow Submitter to Perform Charge Approvals
- ☒ Query field for UDF fields
- General Wizard default UDT09CS *: Employee

The 'Defaults' section contains the following fields and options:

- Number of MyExpense Reports *: 20
- Default Expense Class *: Employee - Commercial
- Number of MyExpense Authorizations *: 20
- ☒ Hide Voided Expense Reports on Desktop
- ☒ Hide Voided Expense Authorizations on Desktop

The 'Image Options' section contains the following fields and options:

- File Imaging *: Standard
- ☒ Gather Receipt Info at ER Sign

The 'Print Options' section contains the following options:

- ☒ Include Voucher Distribution Schedule on ER Print

The 'Expense Authorization' section contains the following fields:

- Last Expense Authorization Number *: TA00000034
- Tolerance % *: 1%

The 'Commitments' section contains the following options:

- Include Expense Authorizations in commitments at status *: Submitted
- Include Expense Reports in commitments at status *: Submitted

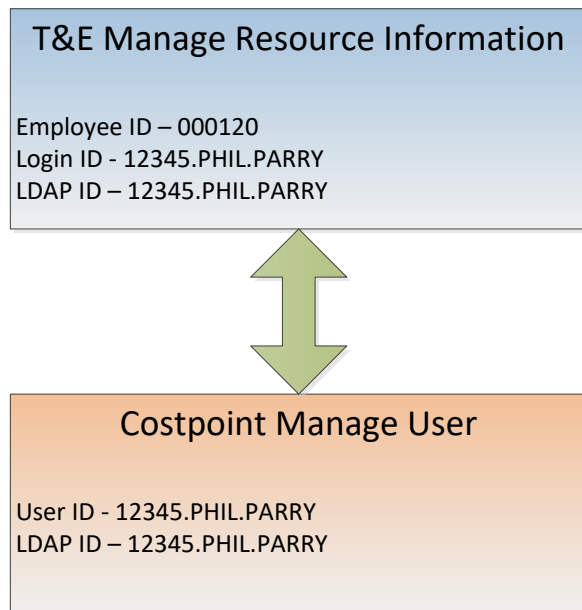
7. Under **Expense Authorization**, enter location values in the following fields:

- Receipt Storage Location.
- Traveler Location (FAX attachment location)
- Traveler Reject Location

Note: In version 9.x, this information was located on the Domain Details screen in the Technical Console.

□ Step 7— Sync Time & Expense Admin User Account

Use this step to review and synchronize the Time & Expense Resource Information record for the main administrator account for which you just assigned user groups. The Time & Expense resource information record (Employee Record) must be associated to user in Costpoint security. For example:



To synchronize the main administrator account, complete the following steps:

1. Click **Time & Expense » Configuration » Resources » Resource Information**.

Query to find the particular Admin Account.

The screenshot shows the "Resource Information" form in the Deltek Costpoint application. The form is divided into several sections. The "Identification" section on the left includes fields for Employee ID (set to "INSTALL"), Last Name (set to "User"), First Name (set to "Installation"), Government ID (set to "000000000"), Vendor ID, Login ID (set to "99999.PHILIPARRY"), Active Directory (set to "99999.philip.parry"), Hire Date (set to "01/01/1900"), Termination Date, Email, and Resource Type (set to "Employee"). The "Payroll" section on the right includes fields for Payroll ID and Payroll Employee ID. The "Costpoint Vendor" section includes fields for Costpoint Vendor Employee ID and Costpoint Vendor Email. A red rectangle highlights the "Login ID" and "Active Directory" fields in the Identification section. Another red rectangle highlights the "Create User Account" button in the bottom right corner of the form.

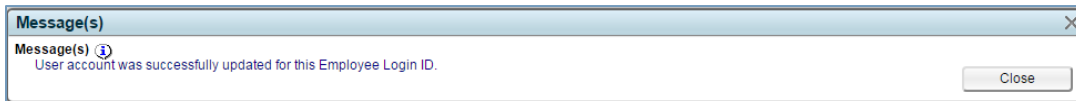
2. Verify that the **Login ID** value is correct. If Time & Expense is co-deployed with Costpoint that value equals the current Costpoint User ID.
3. Verify that **Active Directory** fields is correct.

Step 7— Sync Time & Expense Admin User account

This only needs to be verified if you are using an authentication method other than Database. (If necessary, you can confirm the 9.x Authentication method in the Domains screen of the Technical Console.)

4. Click **Create User Account**.

If all information entered is correct, the following message displays:



5. Log out and log back in.

□ Step 8 — Configure SMTP and Valid Attachment Types

In this step, you will define SMTP server information. If you are co-deploying with Costpoint then SMTP should already be setup. Attachment types only need to be configured for standalone deployments.

To define SMTP server information, complete the following steps:

1. Click **Administration » System Administration » System Administration Controls » Configure System Settings**.

The screenshot shows the 'Configure System Settings' window in Deltek Costpoint. The window is divided into several sections:

- Email System:** SMTP Server Name (SMTP.DELTEK.COM), SMTP Port Number (25), SMTP Server User ID, Password, E-mail Redirect, Require SSL / TLS, and Send all emails from SMTP Server User ID.
- Company Defaults:** Print Cover Page, Report Table Purge (Days) (8).
- Costpoint User Accounts:** Auto-create User Accounts, Authentication Method (Kerberos Single Sign-on), Preferred Notification Method (Email), Generate Random Password, and Manage User Groups in AD.
- 2FA Settings:** None, Mobile Application, Email, IDO.
- Default Settings:** Page Size (Letter), Unit of Measure (Inches), Page Height (11,000), Page Width (8,500), Top Margin (0.125), Bottom Margin (0.125), Left Margin (0.125), Right Margin (0.125), Default Font (Arial Narrow), Default Locale (en_US), Company Logo (DELTEK SYSTEMS), Footer Label, and Footer Text.
- Corporate Settings:** General Settings, Security Settings, Batch Job Retry Defaults (Number of Retries: 25, Retry Period: 1), Licensing Email ID (ConfigSysSet@deltek.com), Enforce Segregation of Duties Rules, Enable AutoComplete, and Use Auto Position mode.

Step 8 — Configure SMTP and Valid Attachment Types

FILE LINE OPTIONS PROCESS HELP Company 1 (CTB80QCM17SUBKS7) Deltek Costpoint

Browse Applications > Admin > System Administration > System Administration Controls > Configure System Settings

System Settings

Company Settings Batch Job Case Reporting Login Banner

☐ Apply Organization Security ☒ Allow Reusing of Passwords Header Color LightSkyBlue ☒ Display System in the Header

☐ Apply Org Security for Employees without User ID ☐ Allow HR Org Manager/Rep/Spvrs from Other Companies

Environment Name

Email System

SMTP Server Name * SMTP.DELTEK.COM SMTP Port Number * 25

SMTP Server User ID Password

E-mail Redirect

☐ Require SSL / TLS ☐ Send all emails from SMTP Server User ID

Company Defaults

☒ Print Cover Page Report Table Purge (Days) * 8

Costpoint User Accounts

☐ Auto-create User Accounts Preferred Notification Method Email

Authentication Method * Kerberos Single Sign-on ☐ FIDO Single Sign-on

☐ Generate Random Password ☐ Manage User Groups in AD

2FA Settings

☐ None ☐ Mobile Application ☐ Email ☐ FIDO

Default Settings

Default Page Size

Page Size Letter Unit of Measure Inches Page Height 11.000 Page Width 8.500

Top Margin 0.125 Bottom Margin 0.125 Left Margin 0.125 Right Margin 0.125

Default Font Arial Narrow

Default Locale * en_US English (United States) ☒ Print Currency Symbol

Company Logo DELTEK SYSTEMS

Footer Label Footer Label

Footer Text Footer Text

Corporate Settings

General Settings Security Settings

Batch Job Retry Defaults

Number of Retries * 25 Licensing Email ID * ConfigSysSet@deltek.com

Retry Period 1

☐ Enforce Segregation of Duties Rules ☒ Enable AutoComplete ☒ Use Auto Position mode

Company Logos

Logo Name *	Description	Logo File Location *	Logo File Name *
DELTEK SYSTEMS	deltek logo	<input checked="" type="checkbox"/> BABES	file name logo
LOGO	LOGO	EFILES	LOGO.BMP
AMDELTEKLOGO	AMDELTEKLOGO	AMATIRA	AMDELTEKLOGO.BMP
LOGO1	logo1	AMATIRA	AMDELTEKLOGO1.BMP

File Upload Limits

File Extension *	Description	Upload Rights *	Maximum Size (MB) *	Source	Never Purge	Expiration Age	Expiration Timeframe	Allow Override
(NONE)	Files With No Extension	Allow	100.00	System Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
.PDF	PDF	Allow	100,000.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
ACH	ACH Files	Allow	1.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
CSV	Comma Separated Values Files	Allow	100.00	System Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
DAT	text files	Allow	1.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>
DOC	DOC	Allow	1.00	User Files	<input checked="" type="checkbox"/>		-None-	<input checked="" type="checkbox"/>

- On the **Company Settings** tab, enter the SMTP server information for Time & Expense, if it is not already defined.
- If you use expense attachments, define the valid file extensions accepted for attachments. In the File Upload Limits table, add rows for the various file types (PDF, JPG, PNG, and so on) acceptable for attachments. Enter the following information:

Column	Description
Upload Rights	Select Allow from the drop-down list.
Maximum Size (MB)	Enter 10 .
Source	The source is User Files .
Never Purge	Select the check box.
Expiration Timeframe	Select None from the drop-down list.

□ Step 9 – Configure Preset Revision Explanation Feature

Time & Expense enables companies that are licensed for Time to define preset revision explanations for use by their employees when revising timesheets.

To configure time settings, complete the following steps:

1. Click **Time & Expense » Time » Time Controls » Configure Time Settings**.

2. On the **Miscellaneous** tab, select the **Must Use Predefined Revisions** check box if a user must select from preset revision explanations.

If this check box is left clear, the user can select from the list or provide the revision.

3. On the Revision Explanations subtask, enter the preset revision explanations.

□ Step 10 – Configure Enhanced Correcting Timesheet Feature

The process of correcting timesheets has been enhanced for Time & Expense Time customers in the following ways:

- A **Correct** button was added to the Timesheets screen, which enables users to open a processed timesheet for editing. This button replaces the Reverse Timesheet toolbar icon available in earlier versions, and the reversal process now takes place “behind-the-scenes.”
- If the timesheet period is closed, the **Correct** button changes to **Request Correction**, which requires the employee to enter an explanation for the request. Via workflow, the request is automatically routed to the appropriate role for approval or rejection. Approvals allow the initiator of the request to correct their timesheet in the closed period.

To configure timesheet correction workflow settings, complete the following steps:

1. Click **Time & Expense » Time » Time Controls » Workflow Events**.

Class	Description	Task	Email
12345678901234567890	test max in TE class	None	
ACTSCASS	Apple's Timesheet Class	None	
ANALYST	ANALYST	None	
ANALYST JR	ANALYST JR	None	
ANALYST SR	ANALYST SR	None	
BA TS CLASS	Booz Allen Timesheet Class	None	
CHE CLASS	Che's Timesheet Class	None	

There are three different events that need to be defined on this screen, as follows:

- An event for the employee requesting correction with appropriate notification/task in the Other Notifications configured in subtask.
- An event for when the appropriate role approves correction request with appropriate notification/task for requestor to perform correction to their timesheet in Employee Notifications configured in subtask.
- An event for when the appropriate role rejects correction request that appropriate notification is sent to requestor as configured in the Employee Notifications subtask.

To configure the timesheet correction setting, complete the following steps:

1. Click **Time & Expense » Time » Time Controls » Timesheet Classes**.

Step 10 — Configure Enhanced Correcting Timesheet Feature

The screenshot shows the 'Timesheet Classes' configuration window in Deltek Costpoint. The 'General' tab is selected. In the 'General' section, the 'Reverse Timesheet on Correct' checkbox is highlighted with a red box. Other settings include 'Hours Increment' set to 'Whole', 'Revision Explanation' set to 'Disabled', 'Time In/Out' set to 'Disabled', and 'Interim Edit' set to 'No Edit'. The 'User-Defined Rates' section shows two rates: 'Billing 01' and 'Labor 02'. The 'Schedule Rights' section has several unchecked checkboxes. The 'Export' section has 'Labor Distribution', 'Payroll', and 'Subcontractor' unchecked. The 'Start/Stop Times' section has 'Mode' set to 'Disabled', 'Edit' set to 'No Edit', and 'Rounding' set to 'Round Up'.

2. Review the status of the **Reverse Timesheet on Correct** check box.

This setting controls whether a complete reversal of a timesheet is required prior to correction when exporting timesheets. This is typically checked for salaried employees, but is left clear for hourly employees, for whom timesheet reversal is unnecessary.

Note: For more information, see [Deltek Time And Expense 1000 General Availability Release Notes](#) or the online [Help](#).

□ Step 11 – Create/Sync Remaining User Accounts

In this step you will create user accounts for Time & Expense-only users and synchronize accounts for users who already have existing Costpoint login credentials. This step grants Time & Expense access to remaining users.

To create/sync user accounts, complete the following steps:

1. Click **Configuration » Resources » Resource Information**.

2. Filter based on currently active users as shown below:

3. Select the employees for whom you want to create user accounts. As you select employees, you should confirm that login ID information is accurate for users with existing Costpoint login credentials.

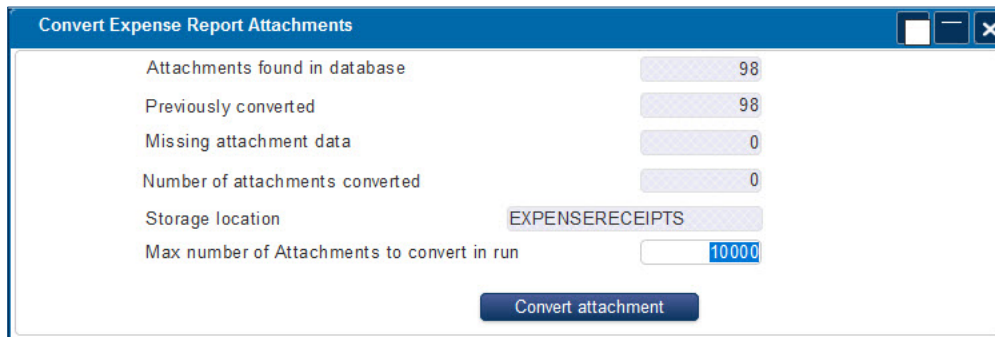
4. Click **Create User Account**. Only existing user accounts are updated. Verify that users can log in to Time & Expense.

Note: If a User ID in the Costpoint Manage User screen does not match the one entered on the Time and Expense Resource Information screen, you may receive an error message: “Different User Account exists for this Active Directory.” To address this issue, revise the login ID on the Time and Expense Resource Information screen to match the User ID on the Costpoint Manage User screen.

□ Step 12 – Database Attachments Conversion Utility

In this step, you run the Expense Report Convert Attachment utility, which converts attachments stored in the 9.0.1 database to PDFs. These PDFs are available to users after the upgrade to the latest version is complete.

Note: The utility should be run only after the Alternate File Location has been set up and configured (see Steps 5 and 6 in this document).



Field	Value
Attachments found in database	98
Previously converted	98
Missing attachment data	0
Number of attachments converted	0
Storage location	EXPENSERECEIPTS
Max number of Attachments to convert in run	10000

Convert attachment

To convert the 9.0.1 attachments, click **Expense » Expense Utilities » Expense Report Convert Attachments**. The process runs automatically when the screen opens.

The converted files are stored in the Alternate File Location (**Administration » System Administration » File Management » Manage Alternate File Locations**) for attachments.

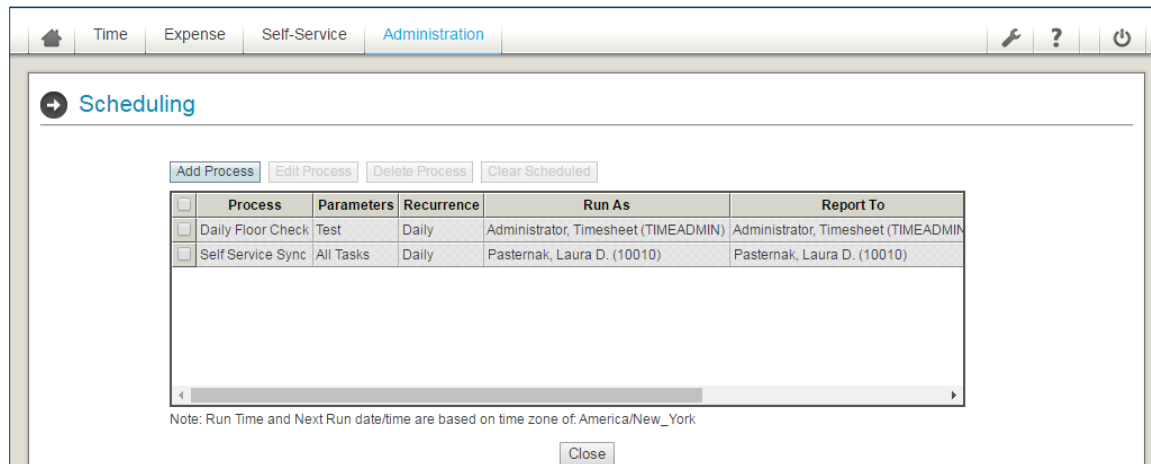
The utility includes the following fields:

- **Attachments found in Database** – This is the number of attachments found in the 9.0.1 database.
- **Previously Converted** – This is the number of attachments that were converted in previous runs.
- **Number of Attachments Converted** – This is the number of attachments converted in the current run. For example, if all the attachments found have previously been converted, this field will display “0” because no attachments were found to convert in the current run. Note that the utility run automatically after the screen is opened.

□ Step 13 – Create Scheduled Jobs

Since the schedule jobs process and its associated parameters have not been converted from Time & Expense 9.x, you must create and save the necessary parameters for the appropriate screen.

Examples of relevant procedures include floor check, timesheet status, expense status, and import master tables. To view existing jobs in version 9.x, open the Scheduling screen of the Administration module.



Once the parameters are specified, you must set up scheduled jobs. See the **Deltek Costpoint 8.0 Process Execution Modes** guide for further information. Also see KB8094 on the Deltek support site.

A step-by-step example of the process used to create a daily floor check is provided below. The example takes you through a five-step process:

1. Create a job parameter.
2. Create a job ID.
3. Create a job queue.
4. Create a server.
5. Submit the job to the queue.

Although the screen location in Step 1 will vary based on the job, you can generally apply all the steps to any scheduled process you need to enable.

Create a Job Parameter (Step 1 of 5)


To create a job parameter, complete the following steps:

1. Click **Time & Expense » Time » Time Reports/Inquiries » Daily Floor Check Inquiry**.

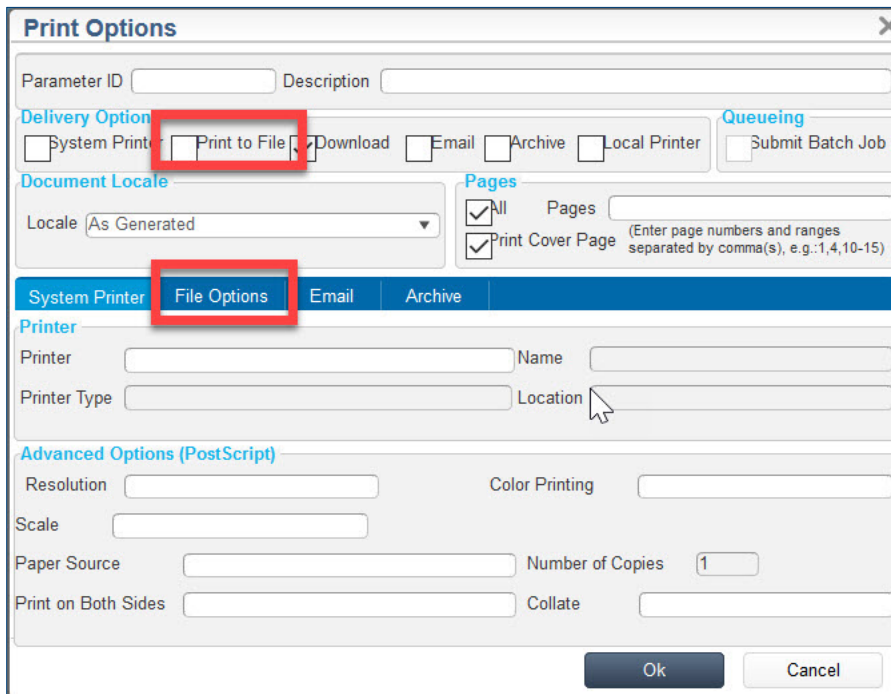
Step 13 — Create Scheduled Jobs

- On the Daily Floor Check screen (in this example), designate the groups and classes for whom the report should be run, as well specify notification options. Note the following fields in particular:

Field	Description
Parameter ID	Provide a unique ID for the parameter.
Description	Provide a unique description for the parameter.
Run for Previous Day	Select this check box to run the report for the previous system date, which is always yesterday's date.
Automatically Send Notification After Producing Report	Select this check box to automatically send workflow notifications after the report runs.

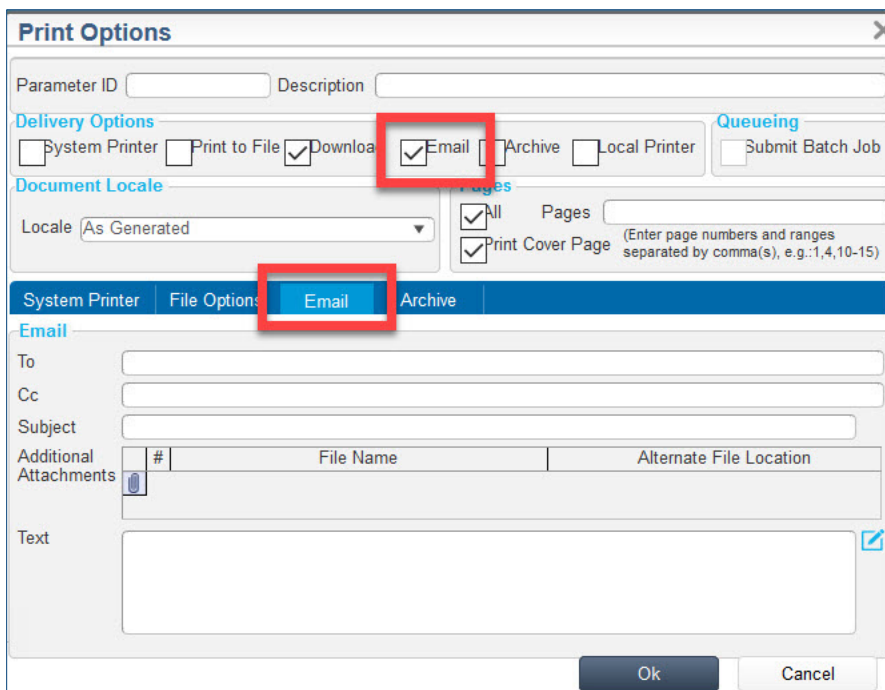
- Click  to open the Print Options screen, where you can establish report output settings. Under Delivery Options, select either **Email** or **Print to file**. Do not select **Local Printer**. If you choose **Print to File**, indicate the delivery options on the File Options tab. Specify the name of the file and designate the location where the report should be saved.

Step 13 — Create Scheduled Jobs



The **Print Options** dialog box is shown with the **File Options** tab selected. The **Delivery Options** section includes checkboxes for **System Printer**, **Print to File** (highlighted with a red box), **Download**, **Email**, **Archive**, and **Local Printer**. The **Queueing** section has a **Submit Batch Job** checkbox. The **Document Locale** section has a **Locale** dropdown set to **As Generated**. The **Pages** section has checkboxes for **All** and **Print Cover Page**, with a **Pages** text field. The **Printer** section has fields for **Printer**, **Name**, **Printer Type**, and **Location**. The **Advanced Options (PostScript)** section includes fields for **Resolution**, **Scale**, **Paper Source**, **Color Printing**, **Number of Copies** (set to 1), **Print on Both Sides**, and **Collate**. The **Ok** and **Cancel** buttons are at the bottom right.

If you choose **Email** as your preferred delivery option, use the Email tab to specify options for email delivery.



The **Print Options** dialog box is shown with the **Email** tab selected. The **Delivery Options** section includes checkboxes for **System Printer**, **Print to File**, **Download**, **Email** (highlighted with a red box), **Archive**, and **Local Printer**. The **Queueing** section has a **Submit Batch Job** checkbox. The **Document Locale** section has a **Locale** dropdown set to **As Generated**. The **Pages** section has checkboxes for **All** and **Print Cover Page**, with a **Pages** text field. The **Email** section includes fields for **To**, **Cc**, **Subject**, and **Additional Attachments** (with a table for **#**, **File Name**, and **Alternate File Location**). There is also a **Text** field with a blue checkmark icon. The **Ok** and **Cancel** buttons are at the bottom right.

Create a Job ID (Step 2 of 5)

To create a job ID, complete the following steps:

1. Click **Administration » Job Management » Job Management Codes » Manage Jobs**.
2. On the Manage Jobs screen, create the job that is associated with the application and parameter you saved in step 1 of the previous procedure ([Create a Job Parameter](#)).

Review values in the following fields:

Field	Description
Job Group	If Job Groups do not already exist, or if you want to set up a new job group, click Administration » Job Management » Job Management Codes » Manage Job Groups and then return to this step.
Module	The correct modules for Time, Expense, and Administration are TM, EP, and AD respectively.
Application	Provide the application name. In the current example, it is TMRFLRCHK.
Parameter	Provide the parameter you previously created in step 1 of the previous procedure (Create a Job Parameter).
Report	Because you already set notification values when you created the parameter, you need to indicate the report. You do not need to indicate processes.

Create a Job Queue (Step 3 of 5)

To create a job queue, complete the following steps:

1. Click **Administration » Job Management » Job Management Codes » Manage Job Queues**.

Step 13 — Create Scheduled Jobs

- On the Manage Job Queues screen, create a new Job Queue, or if one already exists that you want to use instead, you can skip this step of the process.

- If you are creating a new job queue, enter an ID in **Job Queue ID**.
- Click **Save**.

Note: Servers and scheduled jobs do not display until all steps are completed.

Create a Server (Step 4 of 5)

To create a server, complete the following steps:

- Click **Administration » Job Management » Job Management Processing » Start/Stop Job Server**.
- On the Start/Stop Job Server screen, create a server if one does not already exist. You will also assign the Job Queue you created in the above procedure ([Create a Job Queue](#)).

- Review values in the following fields:

Field	Description
Assigned Job Queue	Provide the Queue in which jobs will be submitted (this occurs in a later step).
Active for Server	Select this check box to activate the queue for the server.
Start	Click Start to schedule the jobs currently in the queue.

Submit a Job to the Queue (Step 5 of 5)

To submit a job to the queue, complete the following steps:

1. Click **Administration » Job Management » Job Management Processing » Submit Job Queue**.
2. On the Submit Job to Queue screen, submit the job to the queue.

- a. Review values in the following fields:

Field	Description
Job	Query to find the Job you created in Step 2 (Create a Job ID) of this example.
Queue	Specify the queue to which you are submitting the job.
Execution Option	Select the Start Time/Date.
Start Date	Specify the date the job should first run and reoccur from.
Start Time	Specify the time of day you want the job to first run and reoccur from.
Recur Every	Specify the number of time intervals (in minutes/hours/days/weeks/months) in which the job will recur. In the example of floor checks, it would recur on a daily basis.
Recurring Time Frame	Specify whether the prescribed interval is in minutes, hours, days, weeks, or months. For floor checks, this would typically be daily.

- b. Click the **Submit to Queue** button to submit the job to the queue.

After you complete this step, both the job and server display on the Manage Job Queues screen.

Note: When setting up future scheduled processes, provided you are not adding queues and servers for other jobs, you will only need to perform three of the procedures from this example:

- Create a job parameter (Step 1).
- Create a job ID (Step 2).

Submit the job to the queue (Step 5).

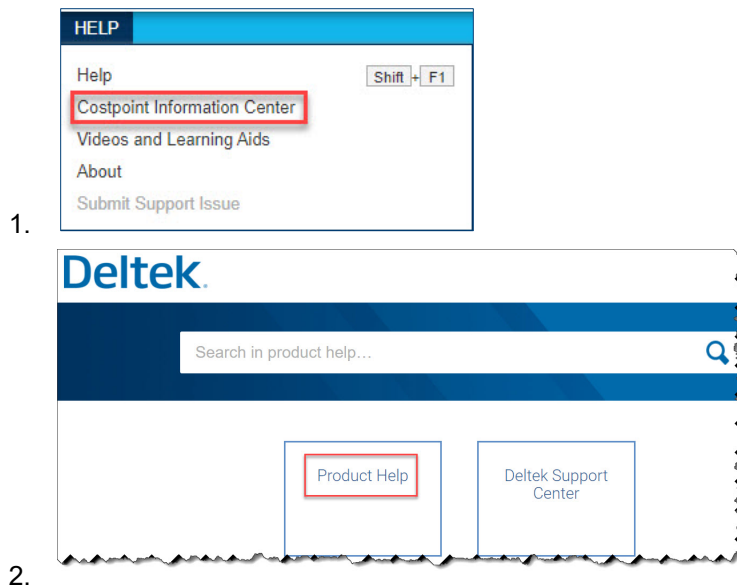
Appendix A — User Interface Customization

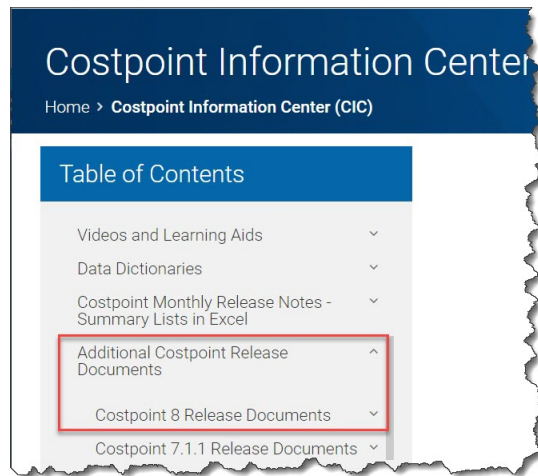
A user interface (UI) profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities. Areas of the interface that can be customized by user or user group include:

- Toolbar
- My Menu
- Hiding Fields/Controls
- Columns, both size and order
- Auto Position Mode
- Tables, including row sorting order
- Application elements, such as tabs and group boxes

To learn more about user profiles, see the online Help for **Administration » System Administration » Workspace Customization**.

For a complete list of available Costpoint Technical Documentation, including configuration guides for Mobile Time & Expense, click **Help » Costpoint Information Center » Product Help » Additional Costpoint Release Documents**. For example:





3.

Also visit the Deltek Learning Zone (<https://education.deltek.com>), and under Costpoint, browse for “Understanding Time & Expense” to see a list of available training resources.



About Deltek

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