



# Costpoint Training Guide:

## Requesting Leave

Electronic Timekeeping

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## Welcome:

All Heptagon Information Technology, LLC employees will utilize Deltek Time & Expense [T&E] to record hours worked. This documentation covers how to request leave in the Time Collection [TC] system.

## Accessing the Portal:

First double click on the Internet Explorer Browser Icon or another web browser.



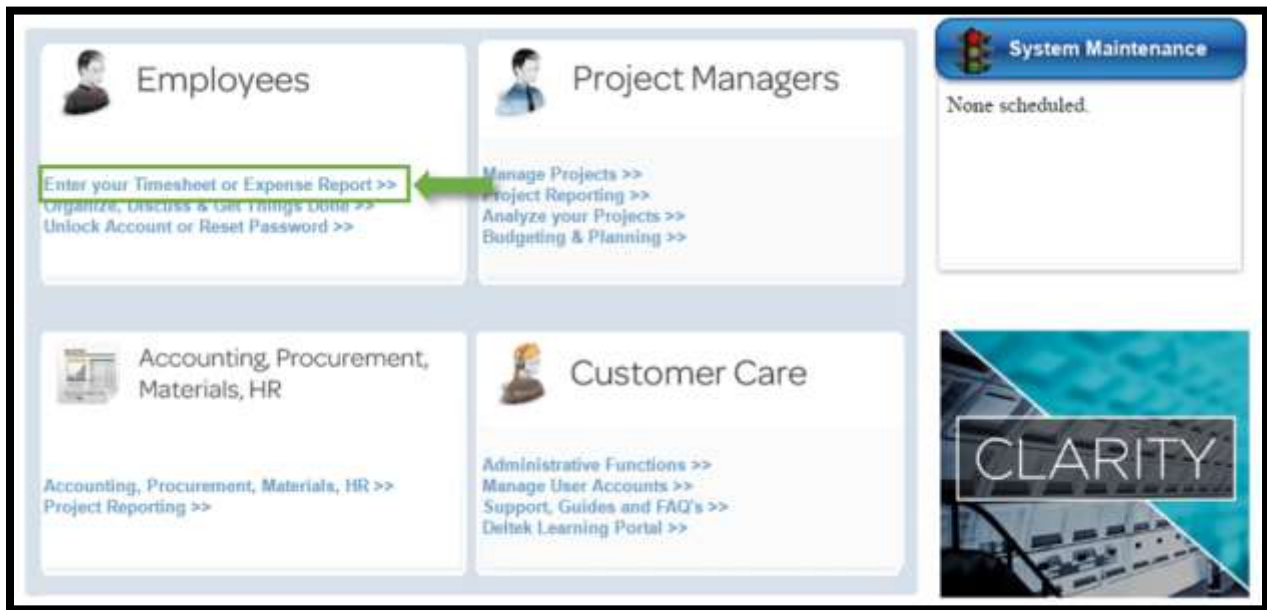
In the address line, enter the following path:


<https://www.costpointfoundations.com/HEPTAGONIT/portal.html>

Please add this as a bookmark on your browser.

## Logging into Deltek Expense:

Click on “Enter your Timesheet or Expense Report”.




**Welcome** 

Username  1

Password  2

System  3

[SHOW ADDITIONAL CRITERIA](#) 

**Deltek Costpoint<sup>®</sup> 7**

Remember log in information

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Enter your credentials, system and click “Log In”. Note that your username and system are NOT case-sensitive. Your password IS case-sensitive.

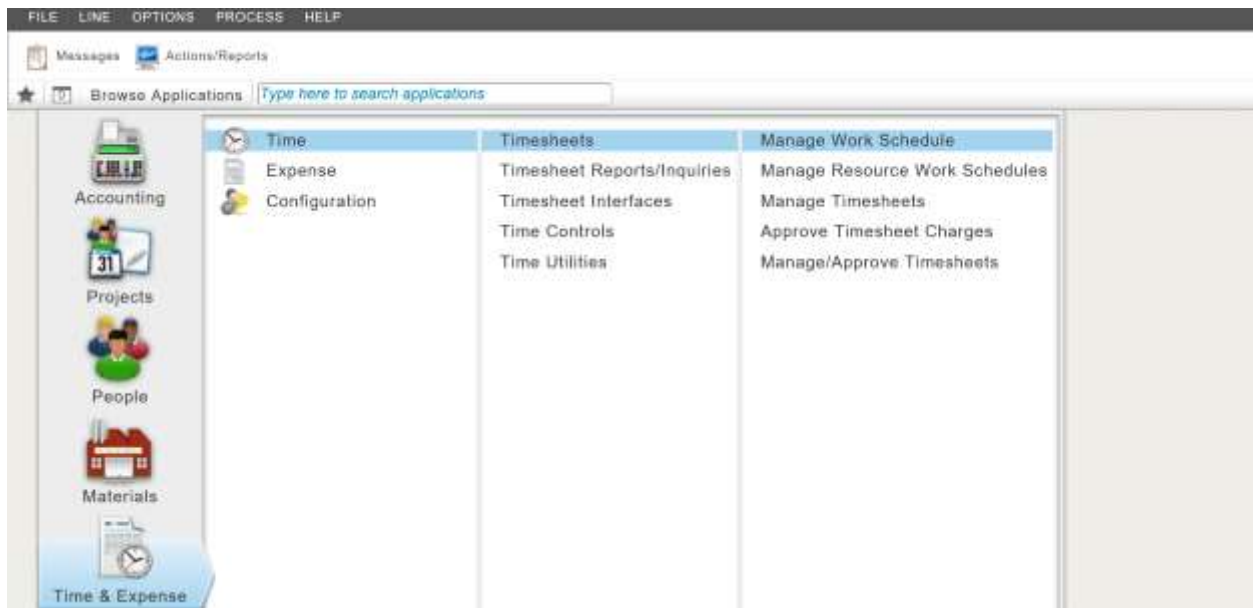
Username: 52678.FirstName.LastName

Password: Password created by user

System: HEPTAGONITTEST

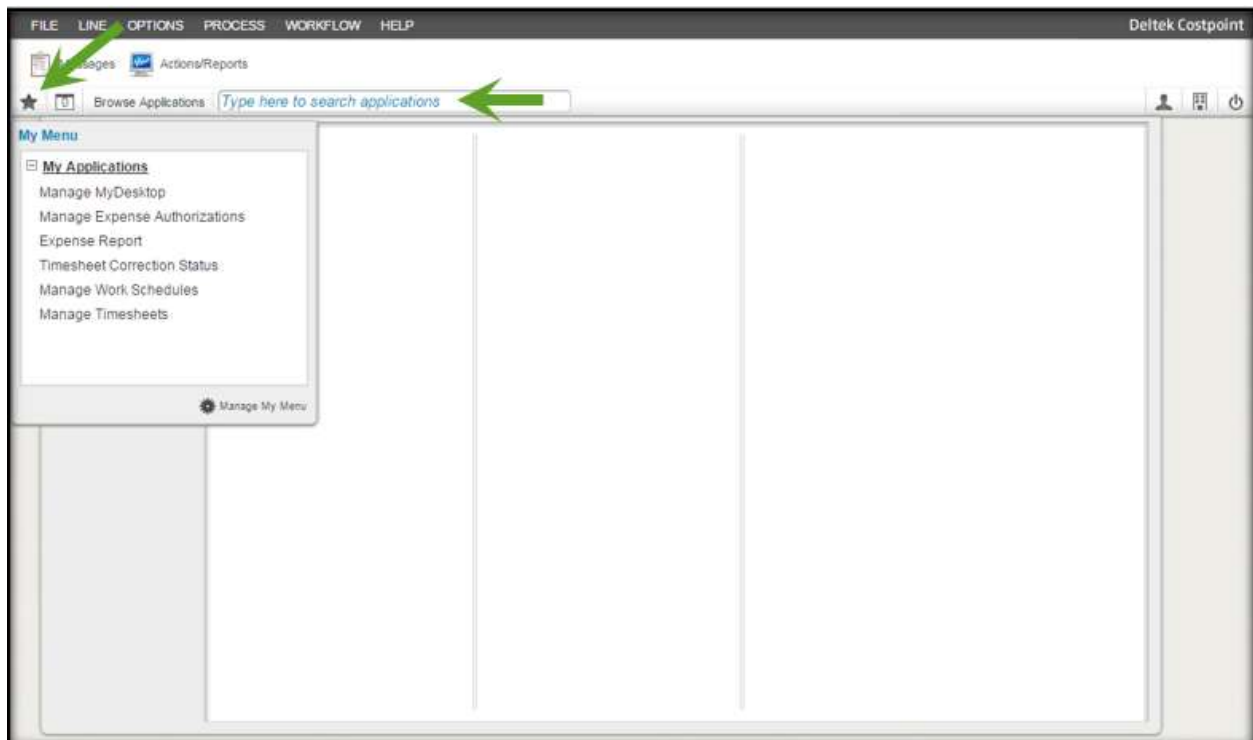
***PLEASE NOTE, THE TEST SUFFIX WILL BE REMOVED AFTER YOUR FIRST 45 DAYS***

## Becoming Familiar with the Timesheet Screen:



- Depending on your job functionality, you may see additional modules
- All users will see Time & Expense
- To Navigate to the area to request leave, select Time & Expense → Time → Timesheets → Manage Work Schedule

## User Navigation:



- Users can add applications to a menu list, My Menu, for quicker access
- Users can also use the browse bar, Browse Applications, to pull up your work schedule

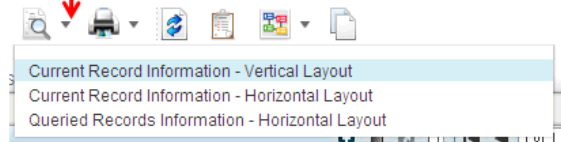


## Global Toolbar in T&E:



Note: full descriptions available in the getting started guide

**Split Buttons:** Several of the toolbar actions have split buttons. They are indicated by the down arrow next to a given toolbar icon. Click on the down arrow to receive additional options for this action.



## Requesting Leave:

- The screen captures found below show the employee's work schedule
- The header displays the employee name, employee ID and the legend of what each color represents
- The "Month/Year" field in blue allows the employee to choose any day in the future
  - o Your work schedule will default to the current month
  - o (1) You can click on the month/year field and choose a different date in a different month, you will need to select the Execute icon (2) once the date is selected
  - o Once you click execute, the bottom part of your screen will refresh and the desired month will display

FILE LINE OPTIONS PROCESS HELP

Browse Applications Time & Expense > Time > Timesheets > Manage Work Schedule

Work Schedule

Employee Install, PCI 9999

This calendar shows, by month, your schedule. Select the date(s) on which you would like to request leave and press the Request Leave button to send the request to your supervisor. Your leave balance(s) are shown along with any pending leave requests

Legend

Non-Work Day  Leave  Work Day (On Site/Off Site)

Holiday  Pending Leave

Month/Year 02/01/2017

Leave Balances Pending Leave Requests Day Of Week

Week Ending	Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/04/2017				1	2	3	4
02/11/2017	5	6	7	8	9	10	11
02/18/2017	12	13	14	15	16	17	18
02/25/2017	19	20	21	22	23	24	25
02/28/2017	26	27	28				

Edit Date Properties

Once you have the desired month on your screen you are ready to request leave.

Once you are in the correct month, you will need to complete the following steps:

- 1 – Click on the date you wish to take off
- 2 – Click on Edit Date Properties
- 3 – Click on Request Leave
- 4 – Enter the number of hours you wish to take off
- 5 – If necessary, specify the start and end time of your time off
- 6 – Enter any notes to your supervisor
- 7 – Select Save

As soon as you hit save, an e-mail is generated to your supervisor notifying them of your request. Your supervisor will then need to log in to review your request and reject or approve it. Once it is rejected or approved, you will receive an e-mail notification from the system.

The screenshot shows the 'Manage Work Schedule' application interface. At the top, there is a menu bar with 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. Below the menu is a toolbar with various icons. The main window title is 'Browse Applications Time & Expense > Time > Timesheets > Manage Work Schedule'. A text box explains that the calendar shows the user's schedule and allows for requesting leave. A legend identifies colors for Non-Work Day (grey), Holiday (yellow), Leave (green), Pending Leave (red), and Work Day (On Site/Off Site) (blue). The 'Month/Year' is set to 02/01/2017. Below the legend is a calendar grid showing dates from 02/04/2017 to 02/28/2017. A red circle highlights the date 02/03/2017. At the bottom right of the calendar, there is a red circle with the text 'Edit Date Properties'. Below the calendar is the 'Edit Date Properties' dialog box. It has a title bar with 'Edit Date Properties' and a 'Query' dropdown. The dialog contains several sections: 'Type' (Company Day of Week), 'Date' (02/03/2017), and 'Day of Week' (Friday). The 'Work' section has 'On-Site' and 'Off-Site' options, each with 'Hours', 'Start Time', and 'End Time' fields. The 'Properties' section has checkboxes for 'Non-Work Day', 'Flexible', 'Holiday', and 'Leave', and a 'Standard Hours' field set to 8.00. The 'Leave' section has 'Hours' (8.00), 'Start Time', 'End Time', and a 'Notes' field with 'Vacation' entered. A 'Request Leave' button is at the bottom right of the dialog. An 'Ok' button is at the bottom right of the dialog box.

## Viewing and Canceling Pending Leave Requests:

Once you save your request, you will notice that the selected date will turn Red, indicating that you have a pending leave request for that day. You can also click on Pending Leave Requests to view a list of all your pending requests for that month.

If you wish to cancel a pending leave request, you will need to complete the following steps:

- 1- Click on the Check-Box next to the date
- 2- Click on Delete
- 3- Save

You will notice that the date turns back to Blue, indicating a normal work day.

The screenshot shows the 'Manage Work Schedule' application window. The window title is 'Work Schedule' and the employee name is 'Install, PCI' with ID '9999'. The calendar shows the month of February 2017. The legend indicates that a red background represents a 'Pending Leave'. The calendar shows that February 3rd, 2017, is marked as a pending leave day. Below the calendar, there is a table of pending leave requests.

Week Ending	Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/04/2017				1	2	3	4
02/11/2017	5	6	7	8	9	10	11
02/18/2017	12	13	14	15	16	17	18
02/25/2017	19	20	21	22	23	24	25
02/28/2017	26	27	28				

Below the calendar, there is a table of pending leave requests:

Date	Start Time	End Time	Hours	Notes/Reason for Rejection
02/03/2017	12:00 AM	12:00 AM	8.00	Vacation

The 'Pending Leave Requests' table has a red circle with the number '2' next to it. The 'Edit Date Properties' button has a red circle with the number '1' next to it. The 'Delete' button has a red circle with the number '3' next to it. The 'Ok' button is at the bottom right.

## Viewing your PTO Balance:

You may view your Leave Balances by clicking on the Leave Balances link:

The screenshot shows the 'Manage Work Schedule' application interface. At the top, there is a menu bar with 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. Below the menu bar is a toolbar with various icons. The main window title is 'Manage Work Schedule'. The 'Employee' field is set to 'Install, PCI' with ID '9999'. A text box contains instructions: 'This calendar shows, by month, your schedule. Select the date(s) on which you would like to request leave and press the Request Leave button to send the request to your supervisor. Your leave balance(s) are shown along with any pending leave requests.' A legend below the text box defines colors: Non-Work Day (grey), Leave (green), Work Day (On Site/Off Site) (white), Holiday (yellow), and Pending Leave (red). The 'Month/Year' is set to '02/08/2017'. Below the legend are three tabs: 'Leave Balances' (highlighted with a red box), 'Pending Leave Requests', and 'Day Of Week'. A calendar table shows dates from 02/04/2017 to 02/28/2017. The 'Leave Balances' pop-up window is open, showing a table with the following data:

Leave	Balance
Sick	32.0000
Vacation	80.0000