PCI

HEPTAGON
INFORMATION TECHNOLOGY

Costpoint Training Guide:

Requesting Leave

Electronic Timekeeping

Table of Contents:

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.

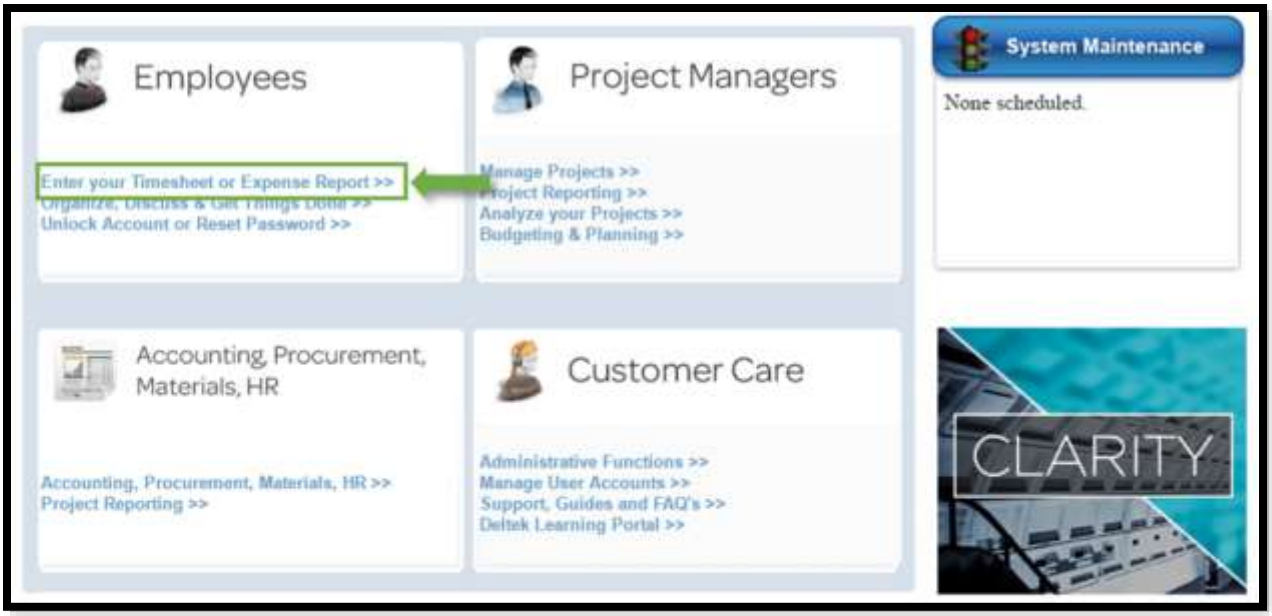
In the address line, enter the following path:

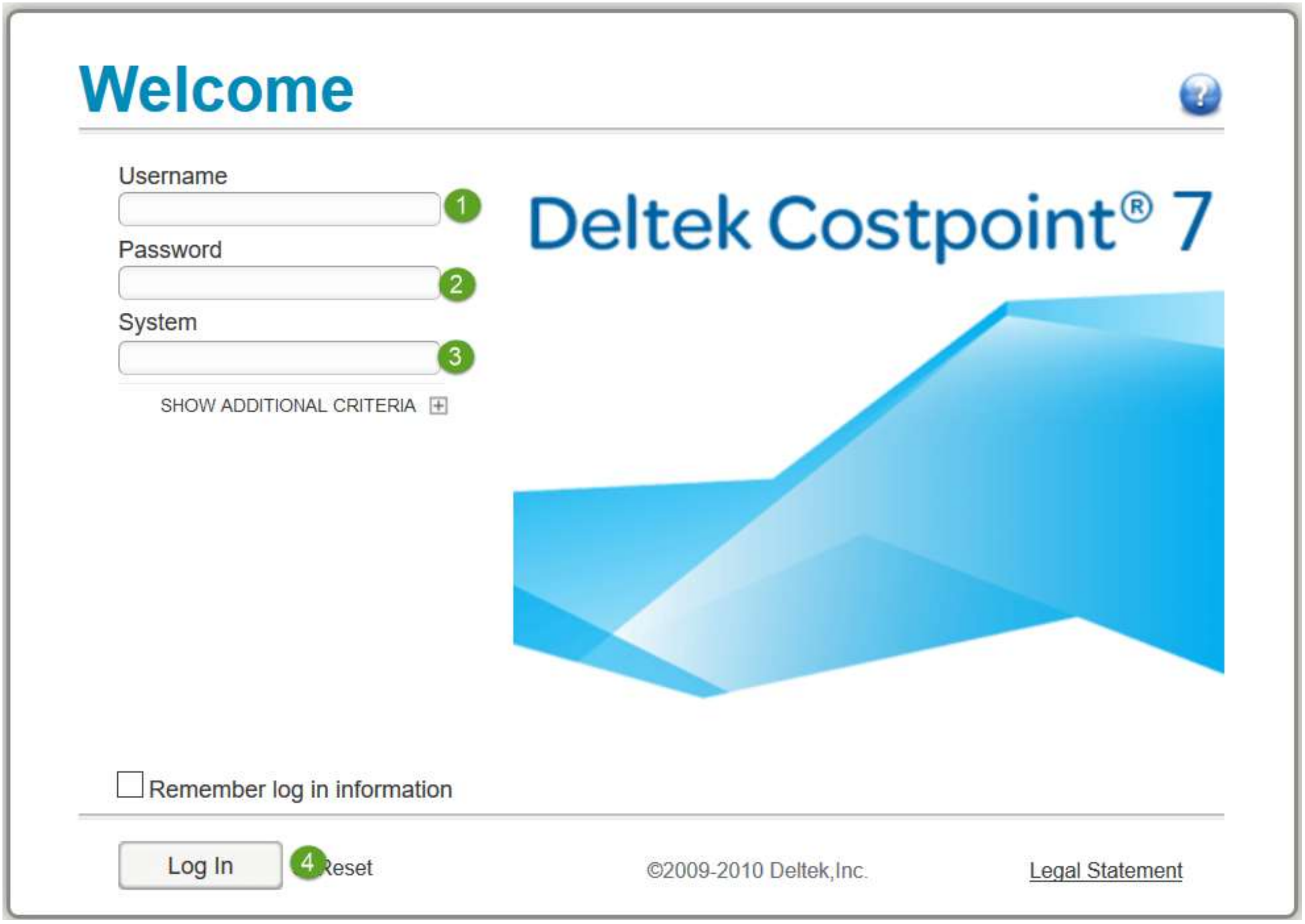
https://www.costpointfoundations.com/HEPTAGONIT/portal.html

Please add this as a bookmark on your browser.

Logging into Deltek Expense:

Click on “Enter your Timesheet or Expense Report”.



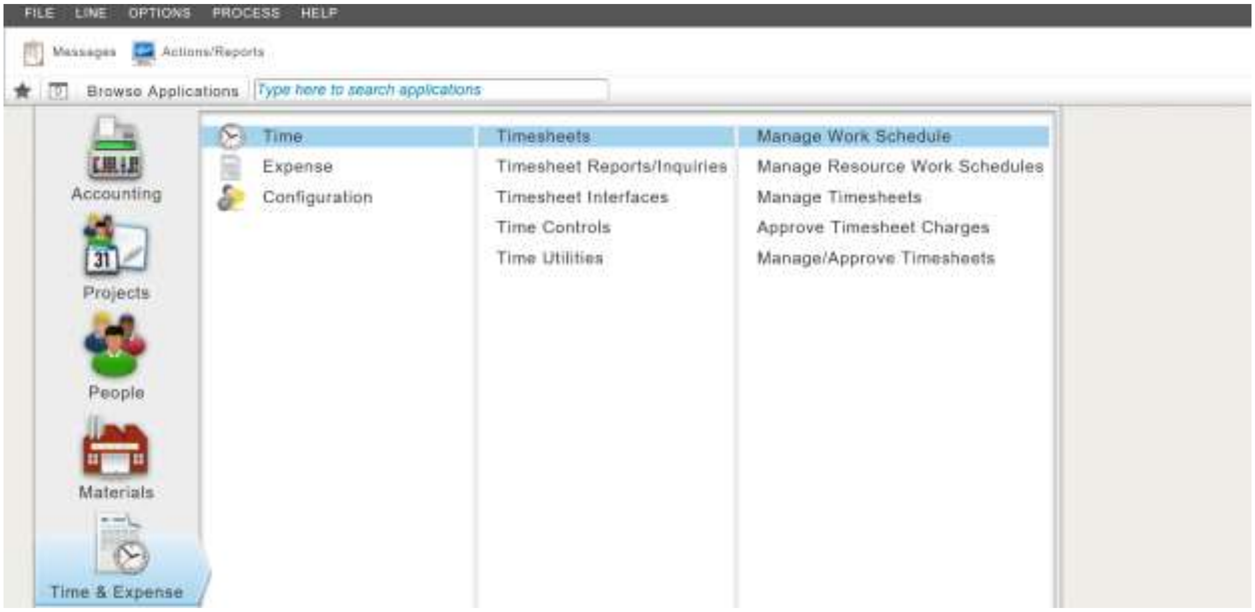


Enter your credentials, system and click "Log In". Note that your username and system are NOT case-sensitive. Your password IS case-sensitive.

Username: 52678.FirstName.LastName
Password: Password created by user
System: HEPTAGONITTEST

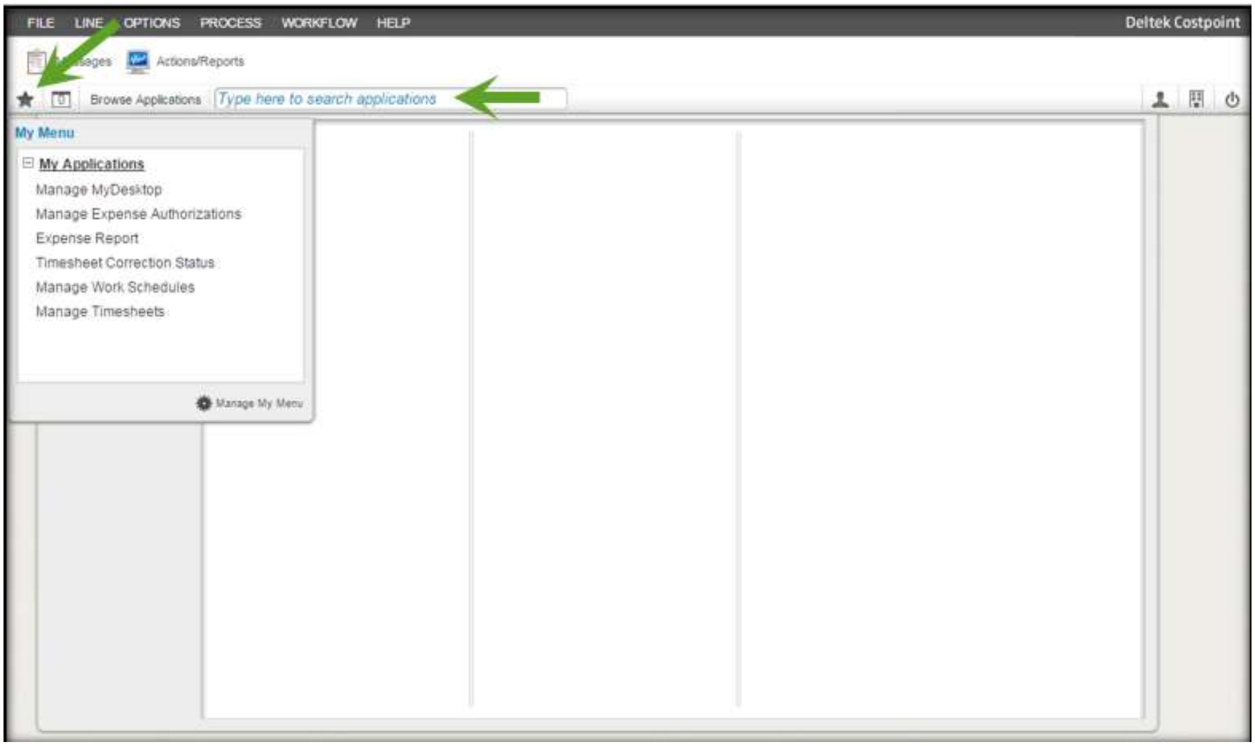
PLEASE NOTE, THE TEST SUFFIX WILL BE REMOVED AFTER YOUR FIRST 45 DAYS

Becoming Familiar with the Timesheet Screen:



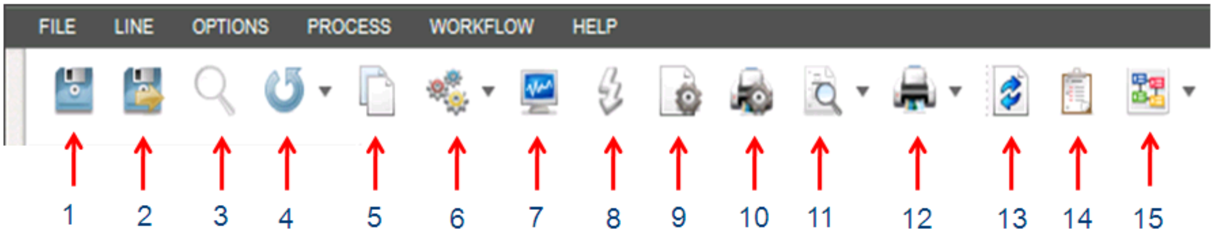
- Depending on your job functionality, you may see additional modules
- All users will see Time & Expense
- To Navigate to the area to request leave, select Time & Expense → Time → Timesheets →Manage Work Schedule

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

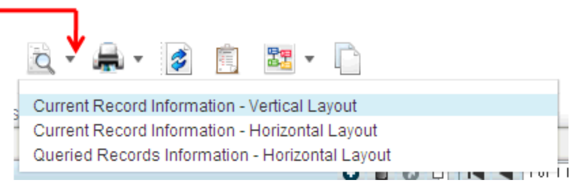
Global Toolbar in T&E:



1. Save
2. Save & Continue
3. Look-Up
4. Refresh
5. Clone Record
6. Default Action
7. View Action\Report status
8. Execute
9. Page Setup
10. Print Setup
11. Preview
12. Print
13. Reset View
14. Messages
15. Workflow

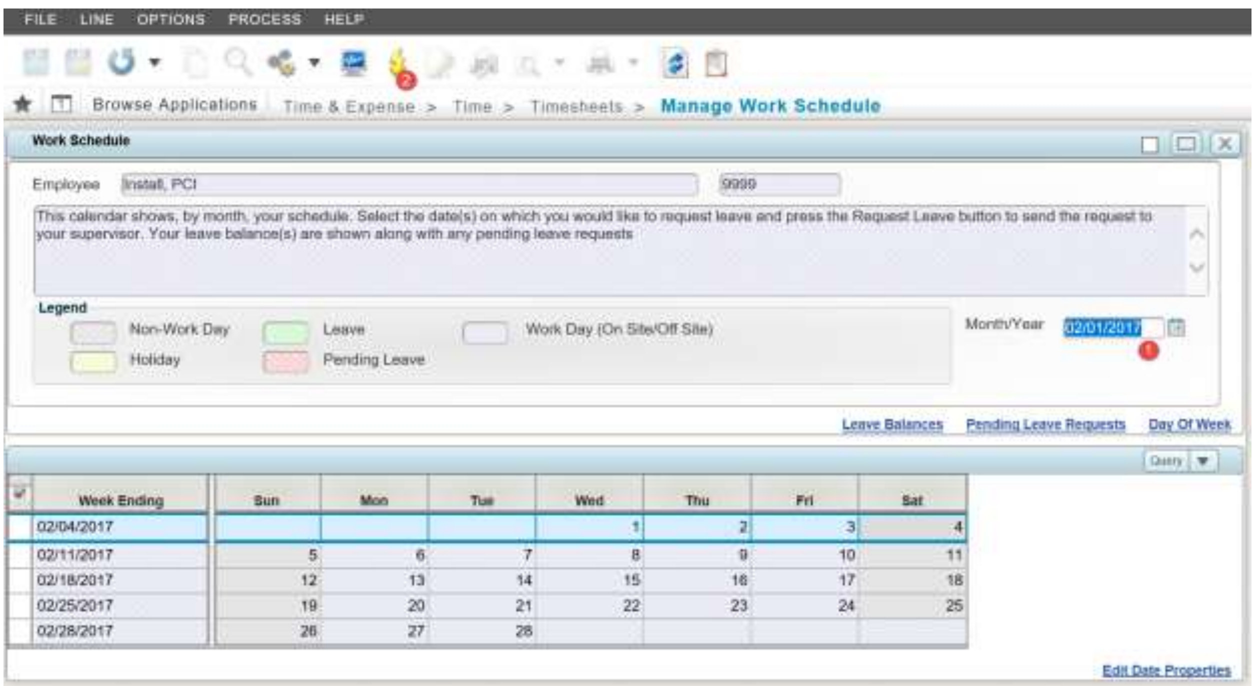
Note: full descriptions available in the getting started guide

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
  - Your work schedule will default to the current month
  - (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
  - Once you click execute, the bottom part of your screen will refresh and the desired month will display

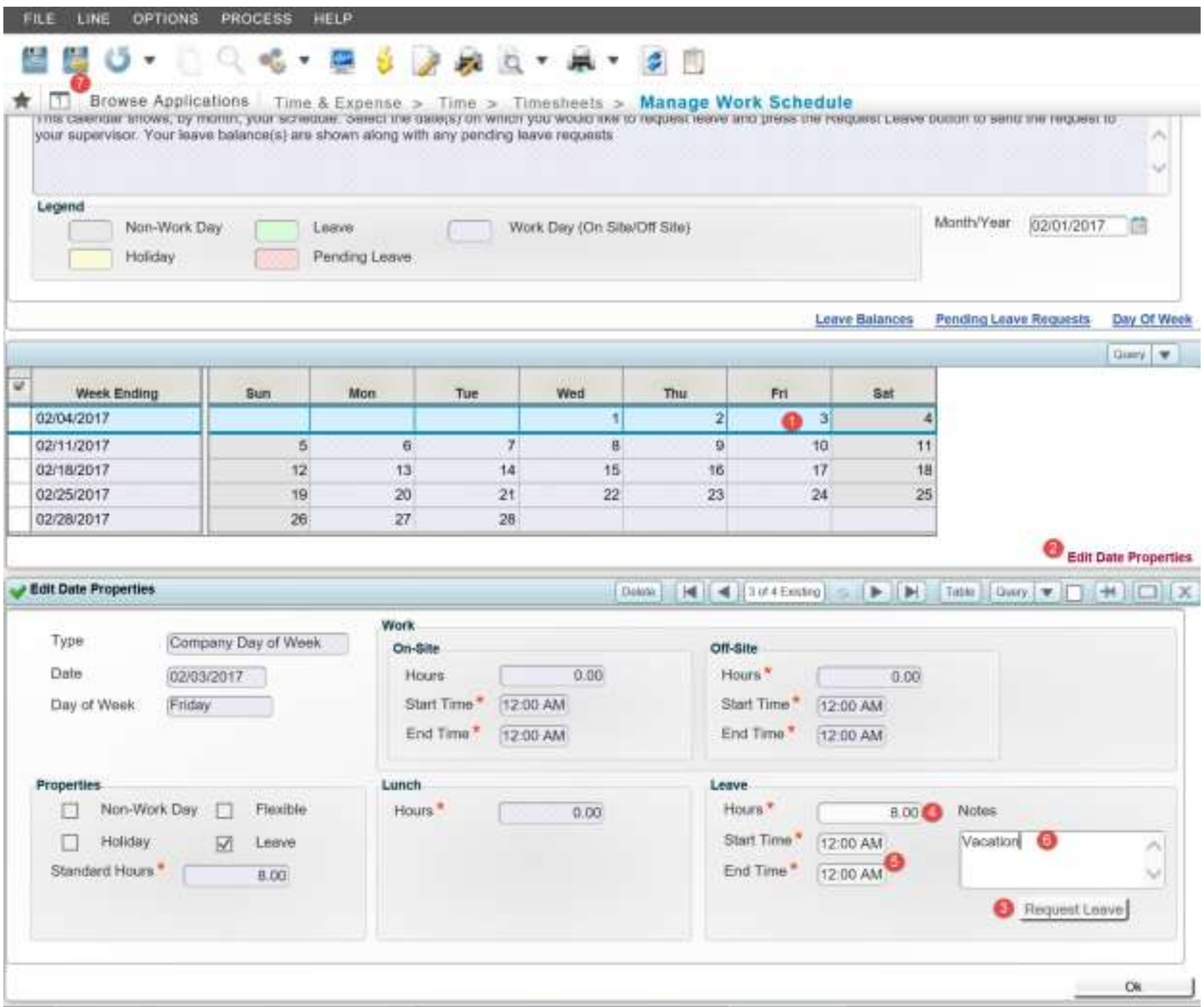


Once you have the desired month on your screen you are ready to request leave.

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.



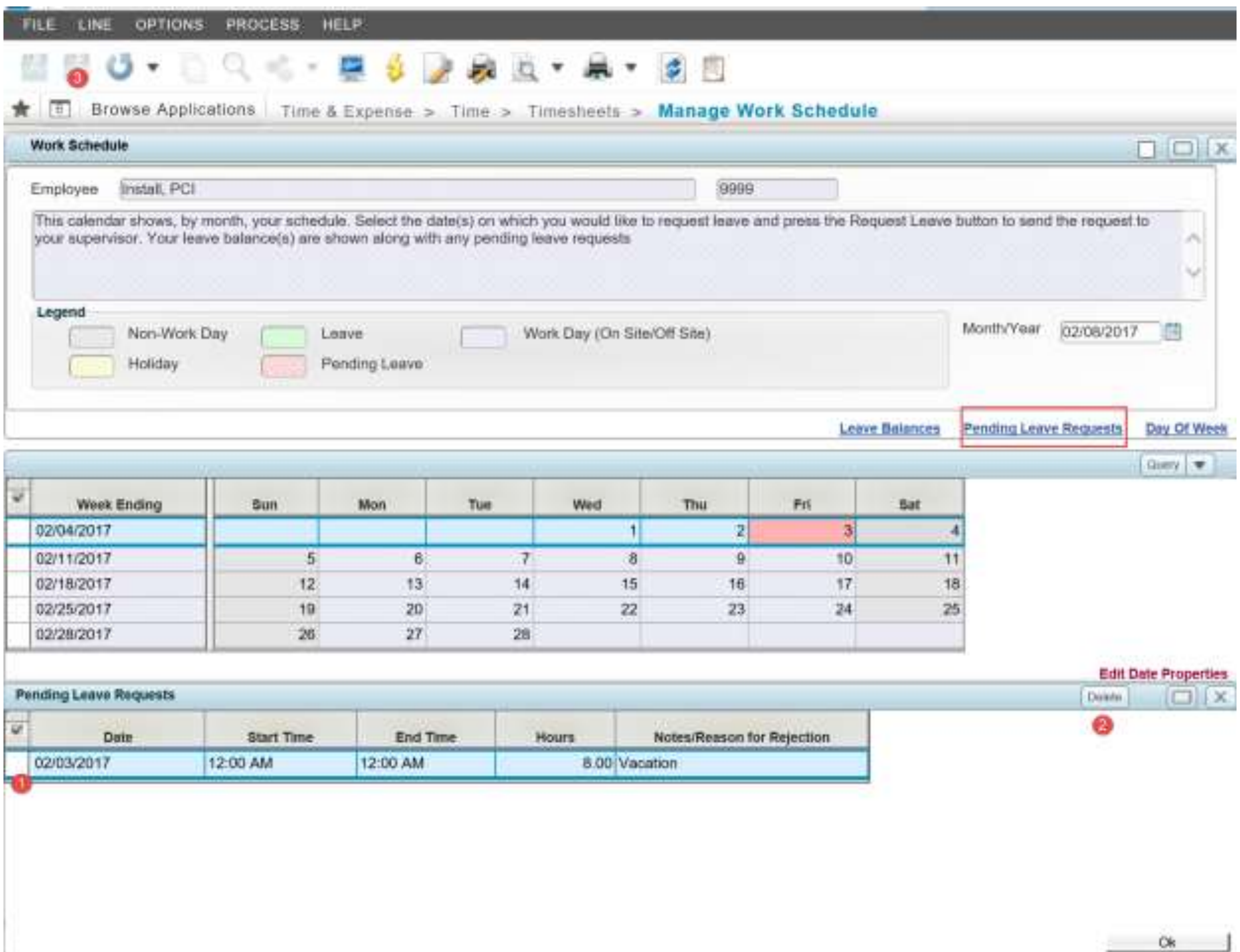
Viewing and Canceling Pending Leave Requests:

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.



Viewing your PTO Balance:

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