



Costpoint Training Guide:

Employee Training Manual

Electronic Timekeeping

Table of Contents:

Welcome: 3

Activating Your Account: 4

Password Requirements: 5

Accessing the Portal: 6

Logging into Time Collection:..... 7

Becoming Familiar with the Timesheet Screen: 9

User Navigation: 10

Global Toolbar in T&E:..... 11

Entering a Timesheet:..... 12

Header: 13

Data Entry Grid: 14

Charge Lookup: 15

Adding Favorites into T&E:..... 16

Entering Hours: 17

Saving your Timesheet: 18

Signing your Timesheet: 18

Revision Explanations:..... 19

Correcting Timesheets: 20

Making Changes Prior to Signing the Timesheet: 20

Making Changes to a Prior Timesheet That Has Been Processed:..... 20

Resetting a Password and Unlocking Your Account: 21

Completion:..... 22

Welcome:

All Heptagon Information Technology, LLC employees will utilize Deltek Time & Expense [T&E] to record hours worked. The following document is our Time Collection [TC] training for employees.

Welcome to Deltek Time & Expense – Time Collection training!

We want you to be able to complete your timesheet as easily as possible. Accurate timesheets are critical because they affect everything we do, from tracking progress and managing contracts, to invoicing, cash flow, and staying in business. Timesheet data must be accurate as it flows into all modules of the corporate-wide system, so any mistakes in your Timesheet can be amplified.

Activating Your Account:

Upon receiving the activation e-mail from Deltek, follow the instructions included in the email to access the activation website and activate your account.

- The e-mail will include the link to Deltek's account activation website
- Upon accessing the link, enter the username and temporary password from your email into the upper left part of the page and follow the instructions to create your security questions and permanent password



New users, login with your credentials to enroll for password self-service.

Sign in

User Name:

Password:

Login

Enrolled users, click on one of the following links to reset your password or unlock your account.



Reset Password

Reset your forgotten password



Unlock Account

Unlock your locked out account

Note1: If you receive a page error message, please try completing this step using an alternate browser, such as Firefox. The site has some compatibility issues with certain versions of Internet Explorer, and Safari, so depending on which version of the software you are using, you may come across this issue.

Note2: Passwords are case sensitive. Upon entering an incorrect password 3 times, your account will automatically lock. You will need to contact administration to unlock your account. Please e-mail your accounting department and request that your account be unlocked.

Upon successful activation, please proceed to your web portal by following the steps below. Please do not attempt to access the portal or the timesheet system prior to successfully activating your account.

Password Requirements:

- Passwords may not contain the user's account name or two consecutive characters that spell parts of the user's full name
- Passwords must be at least eight characters in length
- The last 10 passwords cannot be re-used
- Passwords must contain characters from three of the following four categories:
 - English uppercase characters (A through Z)
 - English lowercase characters (a through z)
 - Base 10 digits (0 through 9)
 - Non-alphabetic characters (for example, !, \$, #, %)
- Passwords are active for 90 days. Two weeks prior to expiration, users will receive an auto email prompting a password change

Accessing the Portal:

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



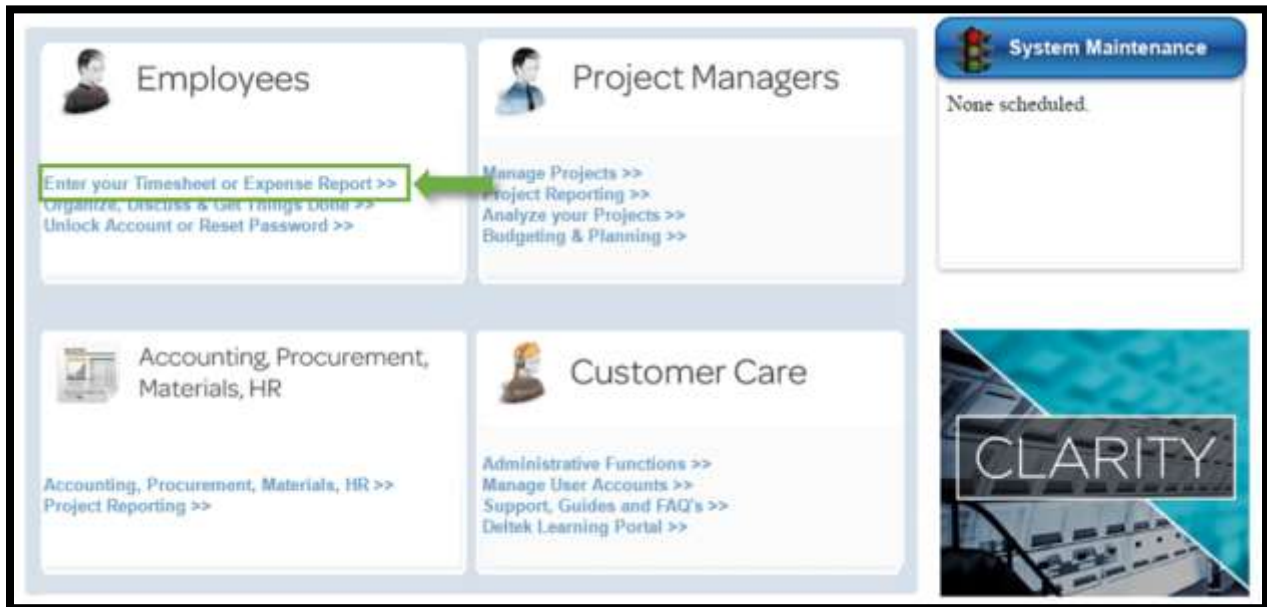
In the address line, enter the following path:

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

Please add this as a bookmark on your browser.

Logging into Time Collection:

Click on “Enter your timesheet or Expense Report”.



Welcome

1 Username

2 Password

3 System

SHOW ADDITIONAL CRITERIA

Deltek Costpoint 7®

Remember log in information SmartPhone mode

4 Log In or Reset

©2009-2010 Deltek, Inc. [Legal Statement](#)

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

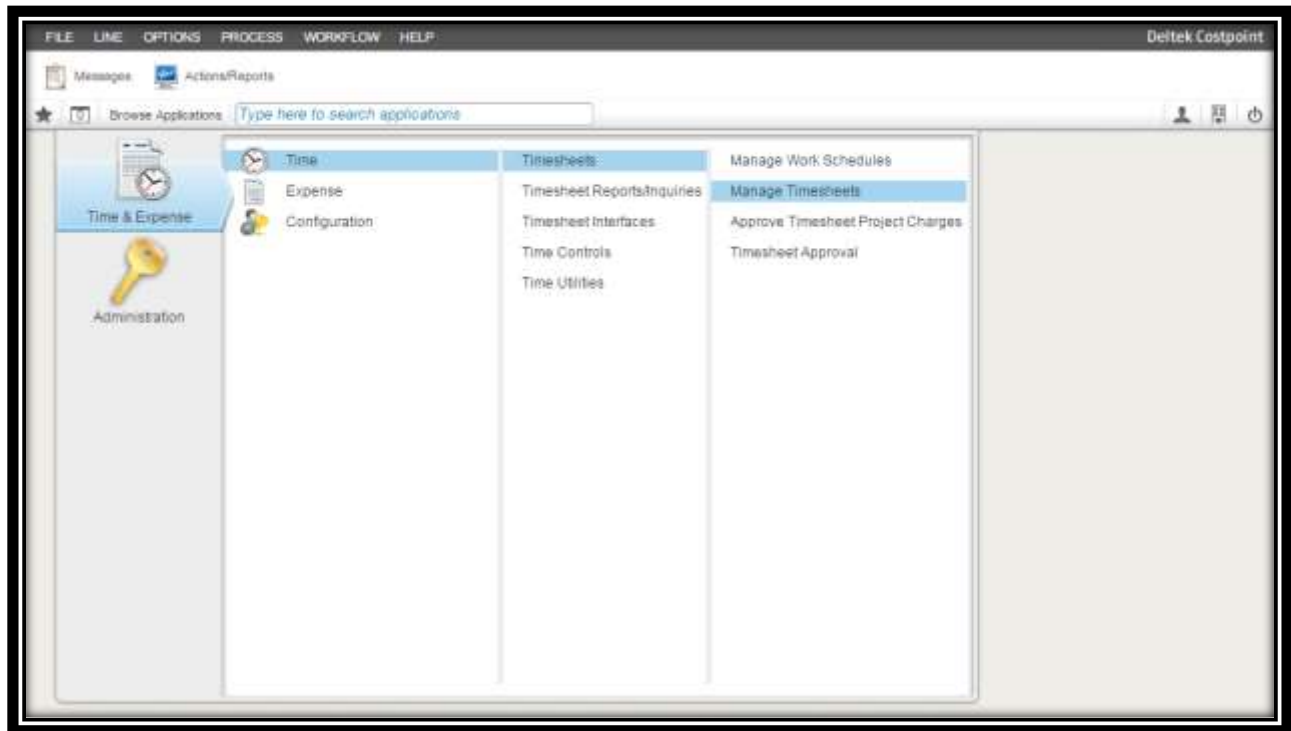
System: HEPTAGONITTEST

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

Note1: A maximum of 20 characters is allowed in the username field. If your full first and last name does not fit, your username will be automatically truncated and the last letters of your last name will be deleted. The activation e-mail from Deltek will include your correct username and it should be entered in the screen above.

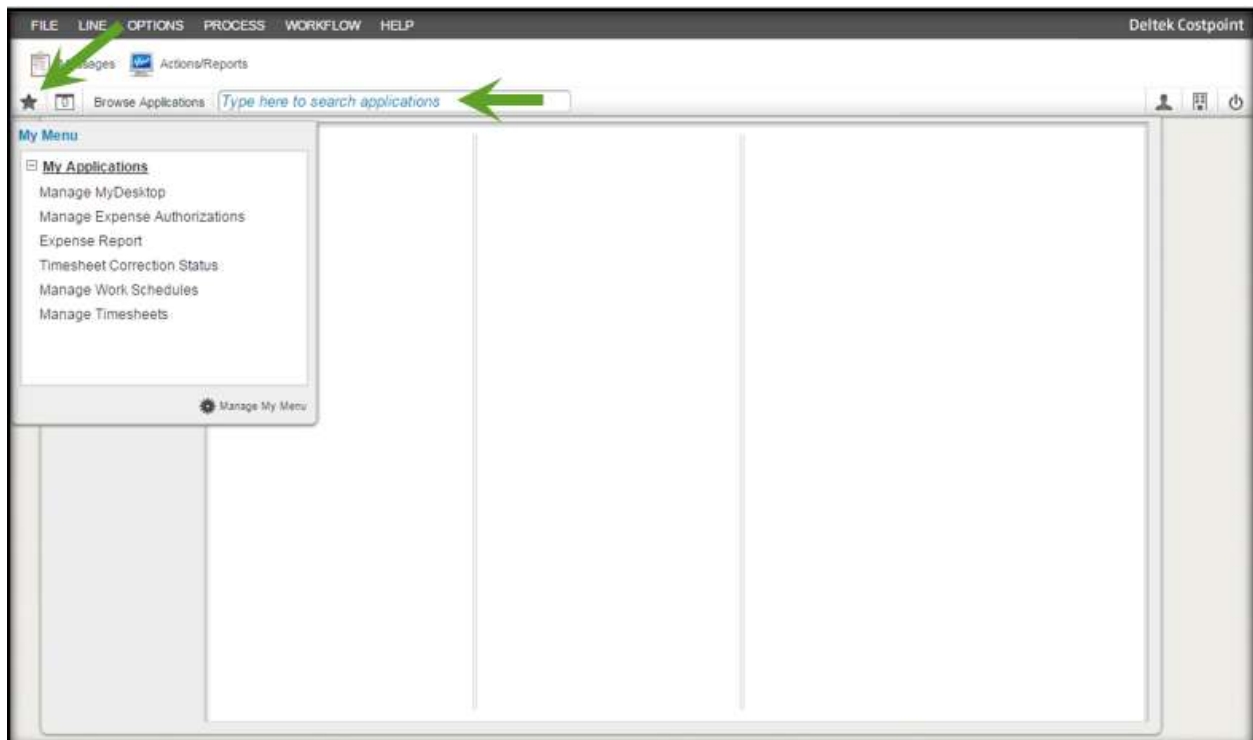
Note2: Make sure you enter the password you created during your account activation. Do not attempt to log into the timekeeping system using the temporary password provided by Deltek. That password should be exclusively used to activate your account.

Becoming Familiar with the Timesheet Screen:



- Depending on your job functionality, you may see additional modules
- All users will see the Time & Expense module
- To Navigate to your Timesheet, select "Time", "Timesheets", and "Manage Timesheets"

User Navigation:



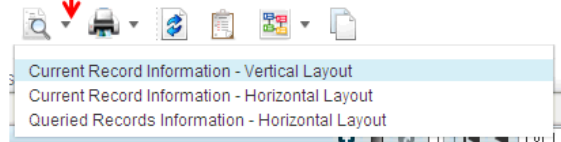
- Users can add applications to a menu list, My Menu, for quicker access
- Users can also use the browse bar, Browse Applications, to pull up timesheets

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.



Entering a Timesheet:

FILE LINE OPTIONS PROCESS WORKFLOW HELP Deltek Costpoint

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

Basic Information Notes Warnings Revision Explanation

Employee Adams, Deltek ID DEL_001 Status Open Revision 1 Entered
 Class Hourly/Regular/Exempt Weekly Period Ending 07/17/2015 Priced
 Signature Sign Approval
 Org 1.1.01.1111 Correct

Leave Revision Audit Per Type Summary Charge Favorites

Timesheet Lines New Copy Delete Form Query

Line	Description	Project	PLC	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
1	GSA Schedule #1	20001					2.00			
2	GSA Schedule #1/GSA Schedule #1	20001.03				6.00				
3	Missile Command	20002								
4	Atrium Towers Multi-Use/Atrium-Cor	20010.02								
5	Gov. Railway Study/Gov. Railway St	27000.001.01								
6	Holiday	LEAVE.HOL								
7	Sick	LEAVE.SCK								
8	Vacation	LEAVE.VAC								
9	Overhead - General/Overhead - Ope	OVRHD.OP1								
	Regular:						8.00			
	Overtime:									
	Total:						8.00			

Note, if you do not have any lines listed on your timesheet please select New, as shown below, to add a charge line to your timesheet.

Timesheet Lines New Copy Delete Form Query

Line	Description	Account	Project	PLC	Sat 1/7/17	Sun 1/8/17	Mon 1/9/17	Tue 1/10/17	Wed 1/11/17	Thu 1/12/17	Fri 1/13/17	Total

Next, we will break the above screen into sections to better explain each area.

Header:

The screenshot shows the 'Manage Timesheets' interface in Deltek Costpoint. The window title is 'Deltek Costpoint'. The menu bar includes 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. The breadcrumb trail is 'Browse Applications > Time & Expense > Time > Timesheets > Manage Timesheets'. The main form is titled 'Timesheet' and has tabs for 'Basic Information', 'Notes', 'Warnings', and 'Revision Explanation'. The 'Basic Information' tab is active, showing fields for Employee (Adams, Deltek), ID (DEL_001), Status (Open), Revision (1), Class (Hourly/Regular/Exempt), Signature, Approval, Org (1.1.01.1111), and Period Ending (07/17/2015). There are 'Sign' and 'Correct' buttons.

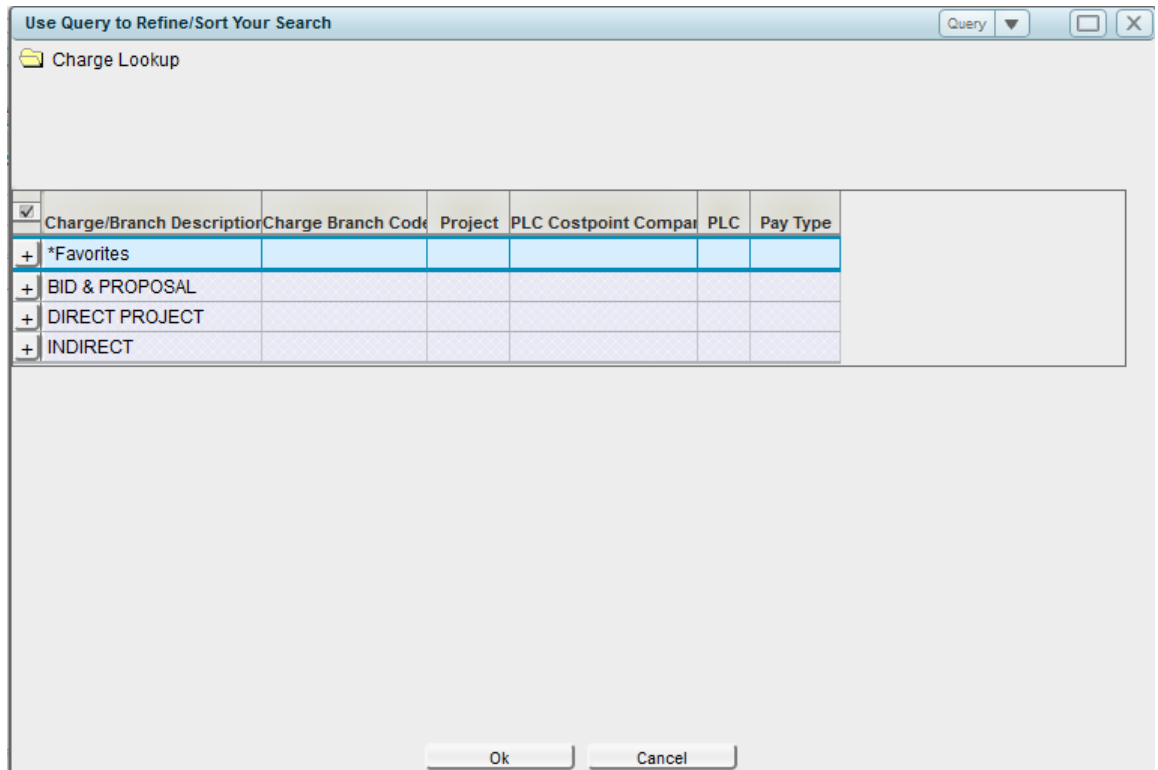
- **Save:** Select the Save option to save the changes made to your timesheet
- **Query:** Select the Query option to open a specific timesheet
- **Arrows:** Use the arrows to move between timesheet weeks
- **Employee:** Non-editable field displays your last name, first name, and middle initial (if supplied) as submitted to your human resources department
- **ID:** Non-editable field displays your employee ID number
- **Class:** Non-editable field dictates the business rules that will be in effect during timesheet entry for the class that is assigned to you
- **Status:** Non-editable field displays the status of the current timesheet.
 - MISSING: Timesheet has not been started
 - OPEN: Timesheet is in progress and has not been signed by the employee or approved by the employees' manager
 - SIGNED: Employee has completed the signing process
 - APPROVED: Employees' manager has completed approval process
 - PROCESSED: Timesheet has been electronically sent to the company's accounting system
 - REJECTED: Timesheet has been rejected during processing. This status usually means that the data on the timesheet is not correct as it stands
- **Revision:** The revision will display as "1" for a new timesheet. The revision number increases automatically by one every time you save auditable changes
- **Period Ending:** This non-editable field displays the period ending date, based on the company's timesheet schedules and the schedule that is assigned to you
- **Signature:** Employees' electronic signature upon completion of timesheet
- **Approval:** Manager electronic signature of approval of employee timesheet
- **Reject:** Manager rejection of employee timesheet

Data Entry Grid:

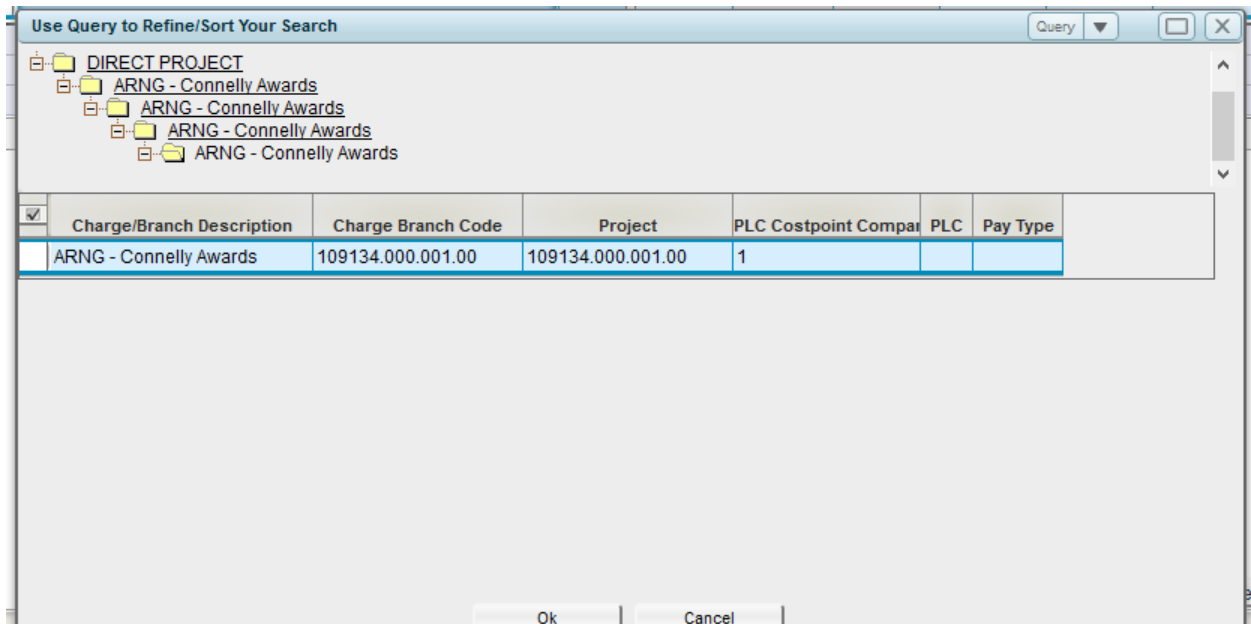
Timesheet Lines					New	Copy	Delete	Print	Query	
Line	Description	Project	PLC	Sat 7/11/15	Sun 7/12/15	Mon 7/13/15	Tue 7/14/15	Wed 7/15/15	Thu 7/16/15	Fri 7/17/15
1	GSA Schedule #1	20001				2.00				
2	GSA Schedule #1/GSA Schedule #1	20001.03				6.00				
3	Missile Command	20002								
4	Atrium Towers Multi-Use/Atrium-Cor	20010.02								
5	Gov. Railway Study/Gov. Railway St	27000.001.01								
6	Holiday	LEAVE HOL								
7	Sick	LEAVE SCK								
8	Vacation	LEAVE VAC								
9	Overhead - General/Overhead - Ops	OVRHD.OP1								
	Regular					8.00				
	Overtime									
	Total					8.00				

- **Project:** Manually enter or look up the charge number to be used for the timesheet period
 - To look up the charge number, click on the magnifying glass under the project column and a new dialog box will open
- **Description:** Defaults based on the Charge Number that is entered
- **PLC:** This is your project labor category (PLC)
- **Pay Type:** This will default to "R"; if you work overtime you may be required to change this value
- **Charge Lookup:** In the charge lookup box, you have the option to drill down each category by clicking on the "+" next to each line until you find the correct indirect or direct charge code

Charge Lookup:



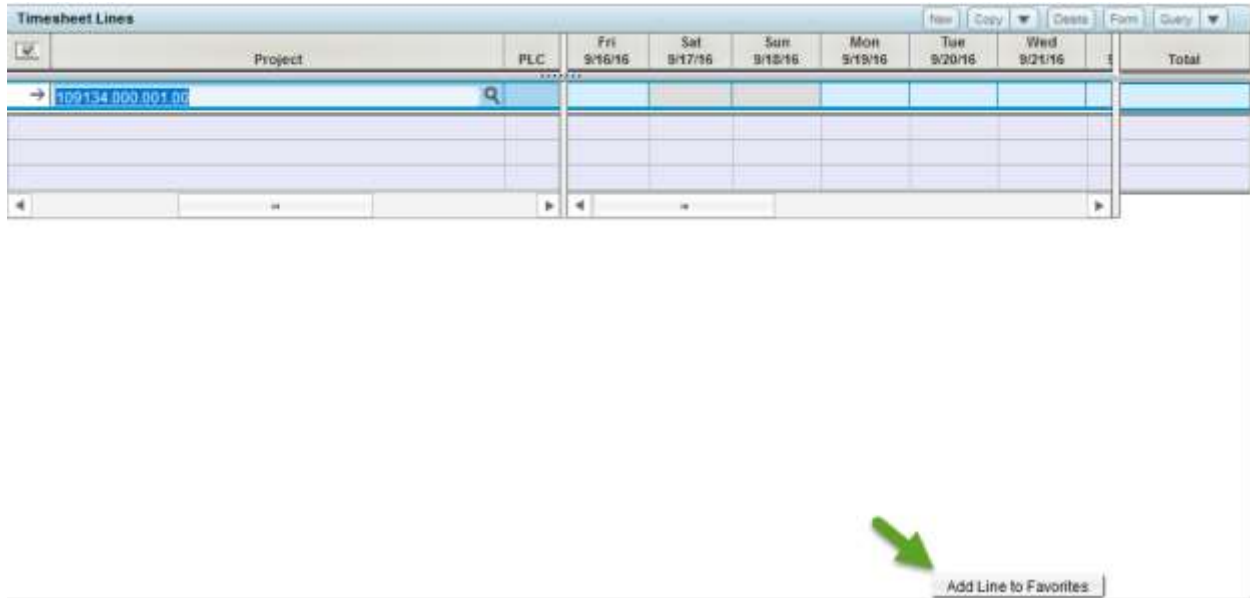
By clicking on an individual charge, the next level, called the "Charge Branch," will display only those tasks the employee has been assigned to charge by the contract workforce. All other tasks will not be visible.



Once the appropriate charge line has been selected, choose the “Ok” button

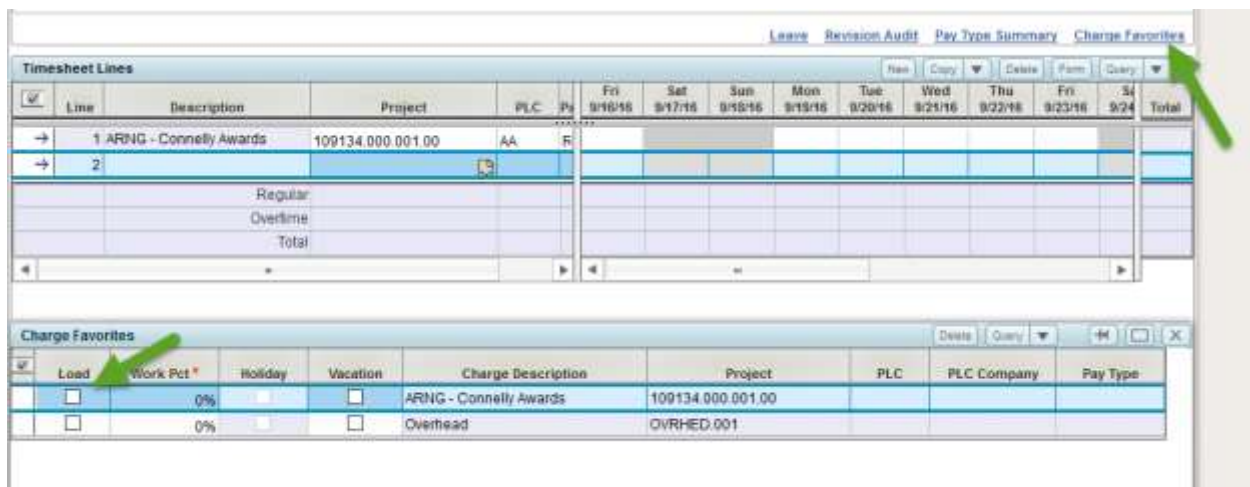
You can add charge codes to your favorites by checking the box next to a charge on your timesheet and clicking the “Add Line to Favorites” button

Adding Favorites into T&E:



If you would like the items in your Favorites list to automatically default when you first open a new timesheet, please do the following:

- Select Charge Favorites link located at the top of the timesheet lines
- Select the **Load** checkbox for the rows that you want automatically loaded
- Select Save and Continue once completed



NOTE: If you believe you are missing a charge code that should be available to you, or if you see a direct charge code that should not be available to you, please contact your supervisor.

Entering Hours:

Hours are entered by day and by charge number. Please note the following:

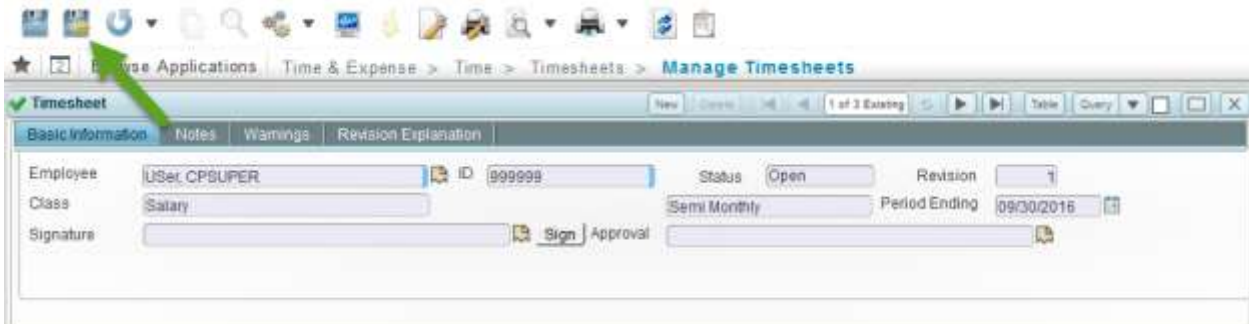
- Hours can only be entered to the hundredth digit (i.e., 7.51)
- The thick line in the middle of the page is called a splitter bar and splits the timesheet into two sections. This bar may be moved either to the left or the right to show more of either screen
- Future hours can be entered for Holiday and Vacation ONLY

Comments: Comments may be entered on either a daily or weekly basis by clicking on the below icon in either the daily or line cell. Only appropriate comments should be entered into the comment box. This is to ensure that inappropriate comments will not carry through to invoices or billing documents that might eventually make their way to a client.

The screenshot displays the 'Timesheet' application window. At the top, there are tabs for 'Basic Information', 'Notes', 'Warnings', and 'Revision Explanation'. The 'Basic Information' tab is active, showing fields for Employee (User: CPSUPER, ID: 999999), Status (Open), Revision (1), Class (Salary), Period Ending (09/30/2016), and Signature. Below this is a 'Timesheet Lines' section with a table. The table has columns for Line, Description, Project, PLC, Pay Type, and days of the week (Fri 9/16/16, Sat 9/17/16, Sun 9/18/16, Mon 9/19/16, Tue 9/20/16, Wed 9/21/16, Thu 9/22/16), plus a Total column. The first row is highlighted in blue and contains: Line 1, Description 'ARNG - Connelly', Project '109134.000.001.00', PLC 'AA', Pay Type 'R'. Below this row are sub-rows for 'Regular', 'Overtime', and 'Total'. Two green arrows point to the 'Regular' and 'Total' rows. At the bottom right, there is a button labeled 'Add Line to Favorites'.

Line	Description	Project	PLC	Pay Type	Fri 9/16/16	Sat 9/17/16	Sun 9/18/16	Mon 9/19/16	Tue 9/20/16	Wed 9/21/16	Thu 9/22/16	Total
1	ARNG - Connelly	109134.000.001.00	AA	R								
	Regular											
	Overtime											
	Total											

Saving your Timesheet:



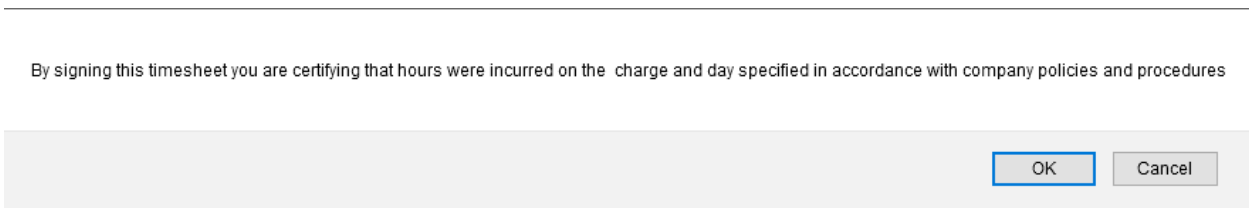
- After you have entered your time for each day, you will need to save your timesheet
- Click on 'Save' in the upper left corner of the timesheet

Signing your Timesheet:

After the timesheet has been completed, it needs to be signed before it can be processed. Under your name there is a box that says "Sign" click this box to sign your timesheet



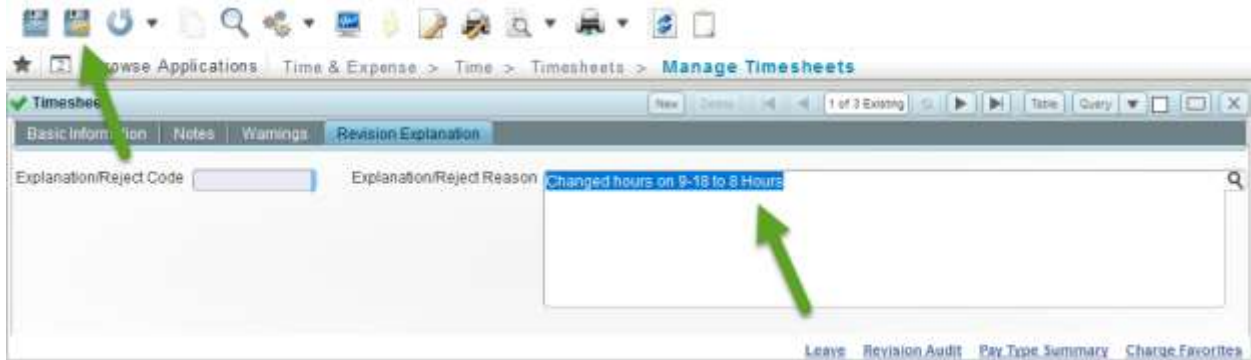
This dialog box will appear.



After hitting "OK" your timesheet is electronically signed and the status of the timesheet will change to "SIGNED."

Revision Explanations:

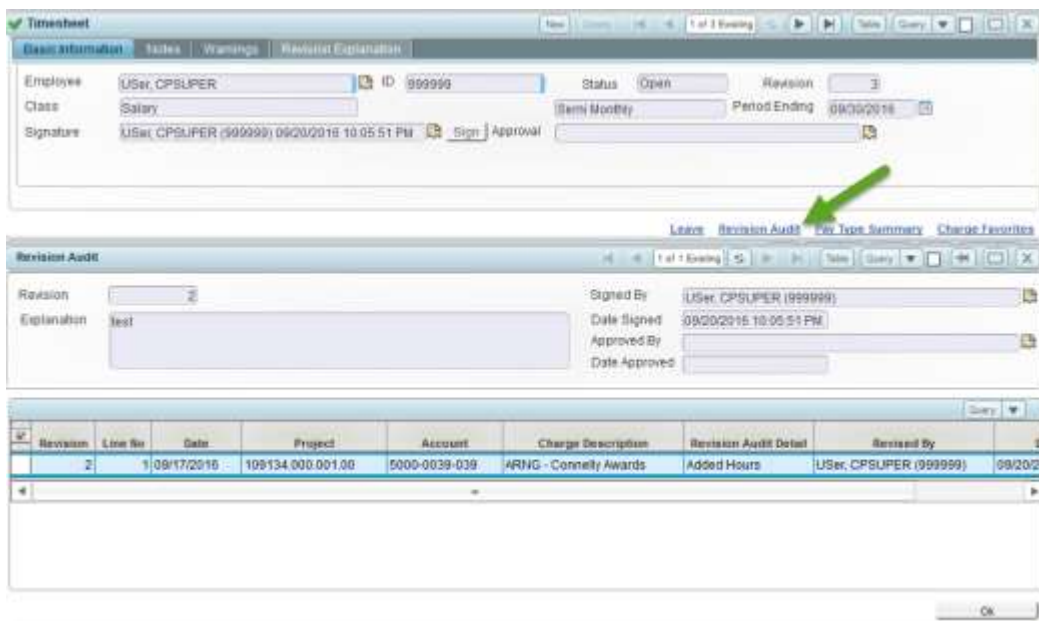
Any time you change a saved field in a timesheet or any field after it has been **signed**, you will be required to insert a revision explanation.



Note that only appropriate comments should be entered into the comment box. This is to ensure that no inappropriate comments will carry through to invoices or billing documents that might eventually make their way to a customer.

Revision explanations allow managers and auditors the ability to review the reason for the timesheet change and can be viewed in the Audit Application.

Revisions can be accessed by the employee or the manager by clicking on the Revision Audit link in the header menu. When accessed a screen appears and shows all revisions for that timesheet.



Correcting Timesheets:

Making Changes Prior to Signing the Timesheet:

Change values within timesheet

- A revision explanation will need to be entered
- Use appropriate Line Function features

Making Changes to a Prior Timesheet That Has Been Processed:

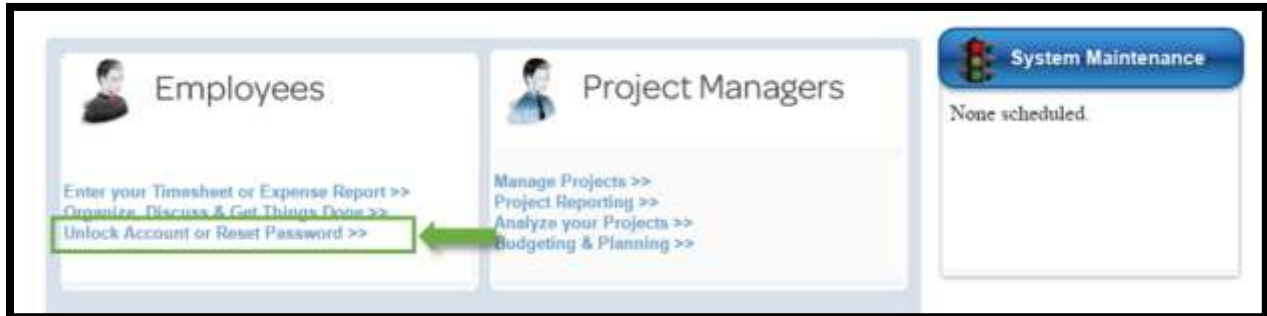
Verify that the timesheet period is open (contact your timesheet administrator if this closed)

- Open the specific timesheet
- Follow the same procedures for a current timesheet
- Employee electronic signature
- Manager electronic signature

*All adjustments that are processed through Electronic Time Collection are required to follow these procedures. Written adjustments will no longer be accepted by accounting.

Resetting a Password and Unlocking Your Account:

If you need to reset your password or unlock your account, please click on the “Unlock Account or Reset Password” link located in the web portal. This will take you to Deltek’s account activation website.



- Once on the account activation page, select the appropriate option from the right-hand side under Account Self-Service and follow the instructions
- Resetting your password also unlocks your account
- Reminder: your password needs to be reset every 90 days. You will receive an e-mail reminder from Deltek prompting you to do so



Account Activation

New users, log in with your provided credentials to activate your account.

Sign in

User Name:

Password:

Login

Account Self-Service

Current users, click the links below to reset your password or unlock your account.



Completion:

Congratulations! You are now an "expert" on basic Time Collection entry, correction, and saving. These are the skills you will need to complete your Timesheet in Time Collection each day.

Please complete and sign this training completion certificate. Then submit the certificate to Human Resources to be included in your personnel file.

Certificate of Completion

Deltek Timekeeping Training

TRAINEE NAME: _____

DATE OF COMPLETION: _____

TRAINEE SIGNATURE: _____ **DATE:** _____