

Deltek Costpoint Changes Summary

For Deltek Costpoint8 New Version Release

February 2021

Applications Panel

On the landing page of Deltek Costpoint in the last panel, "Manage Timesheets" will be titled "Timesheets" and "Manage Work Schedule" will be titled "Work Schedule".

This does not affect navigation.

Current Deltek Costpoint Version



New Costpoint8 Version



Expense

Please note: This section only applies to Magellan Federal team members who currently use the Expense application in Deltek Costpoint. **MFLC Counselors do not currently use the Expense application in Costpoint8.**

In the new release of Deltek Costpoint (Costpoint8), there are minor improvements to graphics and navigation in the Expense application.

New Costpoint8 Version

The "Approve" and "Reject" buttons have been renamed and color-coded for improved visibility.



Ex	pense Report												New Exper	se Report	Form Query	
×	Expense Report ID	Revision	Status	Correction	Total To Me	Batch ID	Payment Received	Charge	Class	Organization	Total Unallowable	Personal	Non-Reimbursable	Total Non Billable	Company Paid	Total Billable
	ER00000137	Q <u>S</u>	bmitted	0	0 521.03 0.00 BIDPR.19.NETCENT Em		Employee	is 01.01.01 - High Tech	0.00	0.00	0.00	521.03	0.00	0.00		
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	Employee		Submit -	Expense Rep	ort (Required)		Submitted		Ale	xander, Ashley (1304) - Wed, 1 Jul 2020 16:05.	1				1	
	Employee		Attach - E	Expense Rece	ipt(s) (Require	ed)	Attached	<u>1 file</u>	Ale	xander, Ashley (1304) - Wed, 1 Jul 2020 16:05	1 Expenses/Entertain	ment		500.00000 USD	2	
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Time Entry

New Costpoint8 Version

In the new release of Deltek Costpoint (Costpoint8), there are minor improvements to graphics and navigation in the Time application.

To create a new timesheet, click the "New Timesheet" button.

Timesheet										Now	Timesheet	opy 🔻	Deterio 🛋	Table	Query 🔻		×
Basic Information																	
Employee*	Parmenter, Megan R.	1	ID*	1001	1	Semi-M	onthiy.			Period Er	nding*	06/30/20	20	Statu	Open		
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To create a new timesheet line, click the "Add Line" button.







All buttons to move forward are green.

Timesheet										New To	mesheet	Copy 💌	Detroit 🛋	Table	Query		×
Basic Information																	
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For Timesheet Approvers: The Approval button is green. The Reject button is red.

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Evans, Tony	1005	Signed	01/15/2020	Entered *	1	Semi-Monthix		Applied Tech Full Tin	ne Salary	01.01.05	Evans, Tony (1005) 2/27	20 9:40:29 AM		Custom Option #	11	
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Work Schedule/Request Leave (PTO)

Please note: Using the Deltek Costpoint system to request/manage leave is a recommended practice. If you are not sure whether this applies to you, check with your Manager or Supervisor.

1. Navigate to the Work Schedule application in Deltek Costpoint

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🏫 ★ 🖪 Brow	se Applications Type here	e to search applications	
	Time	Timesheets	Work Schedule
Time &	Expense	Ī	Manage Timesheets
Expense	Configuration		



2. Click the "New Leave Request" button in the middle of the Work Schedule screen

Employee P	armenter, Meg	an R.						1001				
This calendar she press the submit	ows, by month button. The cu	, your sched irrent leave l	ule. Click on balance shal	New Leave I I be displaye	Request or I d allong with	New Planne the currer	d Leave button to op it calendar year app	pen up the popup. Select the roved or pending leave requ	date(s) and leave type est.	on which you woul	d like to request le	eave and
egend	Non-Work Day		Lea	ve		Wo	rk Day (On Site/Off S	ite)		Month/Year	07/06/2020	
Leave Ralances		nun Patanunder									_	
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ployee Work Schedu Week Ending 87/04/2020	ule Dates	Mon	Tue	Wed 1	Thu 2	Pri 3	Sat 4		New L	eave Request	Edit Daily S	Schedule
Week Ending 07/04/2020 07/11/2020	ule Dates	Mon 6	Tue 7	Wed 1 8	The 2	Fri 3 10	Sat 4 11		New L	eave Request	Edit Daily S	schedule
View Coding Week Ending 97/04/2020 97/11/2020 97/11/2020	Sun 5 12	Mon 6 13	Tue 7 14	Wed 1 8 15	The 2 9 16	Fri 3 10 17	Sat 4 11 18		New L	eave Request	Edit Daily S	schedule
Veek Ending 97/04/2020 97/11/2020 07/11/2020 07/12/2020 07/12/2020	Sun 5 12 19	Mon 6 13 20	Tue 7 14 21	Wed 1 8 15 22	The 2 9 16 23	Fn 3 10 17 24	Sat 4 11 18 25		New L	eave Request	Edit Daily S	schedule

- 3. In the New Leave window:
 - a. Use the calendar icons to change the "From" and "To" dates. You can request a single day or a range.
 - b. Use the down arrow in the "Leave Type" field to select the type of leave you are requesting. Your available balance displays
 - c. Enter the number of hours requested per day in the Daily Hours field
 - d. Enter any explanation related to your request in the Notes field
 - e. Click the "Apply" button
 - f. "Save" and x out of the Work Schedule screen(s)

		6	
From *		Te*	
07/06/2020	1	07/06/2020	3
Leave Type*		Notes	
PTO	•		
Daily Hours*	Total Hours		
0.00	0.00		

On Your Timesheet

You will receive an email notification when your Timesheet Approver takes action on your leave request. Approved leave displays green, pending leave displays light pink, and rejected leave displays bright red.

Please note: Leave can be requested into the future but cannot be recorded on your timesheet until the pay period in which it occurs.



Adding Leave/PTO Hours to Your Timesheet in Costpoint8

Once leave time (PTO) is approved, a green highlight will display in those dates on the current timesheet. To add PTO hours to the timesheet:

1. Build a new timesheet line by clicking on the "Add Line" button.

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Basic Information																	
Employee*	Parmenter, Megan R.	1	ID*	1001	1	Semi-M	onthiy.			Period En	ding*	06/30/20	20	Status	Open		
Class	Applied Tech Full Time Salary																
Signature					Approval												
Organization	01.99.05																
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- 2. Click or tap in the Project field to drill down (i.e., open folders) into the Charge Lookup tree.
- 3. Click into the "Indirect" folder, then "Fringe Benefits" and select the appropriate Charge Branch Code.

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Ē	Charge Lookup INDIRECT Fringe Benefits							
V	Charge/Branch Description	Charge Branch Code	PROJECT	PLC	Cost	point C	omp	any
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+	Leave without Pay	FRNG.LWOP						
+	Military Leave	FRNG.MILI						
+	Paid Time Off	FRNG.PDTO						
•								►
		(5	elect		C	ancel		

- 4. Enter hours for the date(s) on the timesheet line(s) that corresponds to the correct Charge Code.
- 5. Click "Save" to save your timesheet entry.



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Approving Leave Requests for Supervisors/Managers

Managers receive emails notifying them of leave requests submitted by their employees. Leave requests are found in the Resource Work Schedules > Pending Leave Requests screen. There are two ways to navigate to this screen:

- Through the application panels: Time » Timesheets » Resource Work Schedule, or
- In the Browse Applications field, type "Manage My Desktop" and select "Work Schedule" from the Tasks list.

Resource Work Schedu	lles							
Criteria Employee ID Last Name Active * Functional Role * Work Schedule Date *	CJ05 Yes V Primary Supervisor 07/13/2020	13, 2020 to Jul 19, 2020				After you vie employee's l	Ion-Work Day Ioliday eave eave eave reques	⁹⁾
Pending Leave Requests	Last Name vee Name CJ05)	Click an employee's na leave requests associat that employee in the P Leave Requests table.	me to view ted with ending	End Time	Hours	select the ch the request a Approve or I 8.00 tests	eck box for and click Reject . tes/Reason for Re	jection
Employee Work Schedule							Appro	ve Reject
Cipriano, KeaneEMP L. (C	Irce CJ05)	Pending Leave Weekly Hours 0.00	Mon 7/13 8	Tue 7/14 8	Wed 7/15 8	7/16 8	Fri 7/17 8	Sat 7/18
			<u>14 - 2 11</u>	Leave Balanc	es 🛛 Edit Day	Edit Daily Sci	hedule Reset	Selected Row(s)

On the Resource Work Schedules screen:

- 1. Click an employee's hyperlinked name in the Employee Work Schedule table to view the Pending Leave Requests table for that employee.
- 2. After you view the employee's leave request, select the check box next to the employee's name for the request and click Approve or Reject.
- 3. A Friendly Reminder: Don't forget to click Save!

About Leave Requests in Costpoint8

The Leave Requests table displays both leave that has been approved and leave awaiting approval. Approved leave displays in 8/8 green while leave pending approval displays in 8/8 red. The first of the two numbers displayed in the cell represents the number of hours that have either been requested or approved, while the second number represents the total standard hours for the employee's workday.

Leave requests that span multiple days display with each day allotted its own row in the Pending Leave Requests table. You can approve or reject all days of the requested leave, or individual ones.

Reach out to your next level Supervisor or Manager if you have any questions.