Costpoint Training Guide:
Employee Training Manual

Electronic Timekeeping
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**Introduction**

This guide is designed to provide instructional insight into the procurement processes within Costpoint. Each section is designed to provide best practices, in accordance with system operations and workflow. This guide is designed to be used by employees who already have an understanding of basic access and navigation within Costpoint. All screens are shown in Form View for ease of read, table view may be preferred.
Welcome:

All Azimuth employees throughout the corporation will utilize Deltek Time & Expense [T&E] to record hours worked. This documentation covers Time Collection [TC] training for employees.

Welcome to Deltek Time & Expense – Time Collection training!

We want you to be able to fill out 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 has to 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:

- You will receive an email with your username and a temporary password. You will use these credentials to access the system for the first time. A link to the portal page is included below. Upon logging in for the first time, you will be asked to change your password. Please follow the instructions below and create a password that fits the requirements listed.

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 and Logging in:

First double click on the Google Chrome Icon or another web browser.

In the address line, enter the following path:

https://www.deltekenterprise.com/AZIMUTH/portal.html

Please add this as a bookmark on your browser.

Upon accessing the portal, please click on Enter your Timesheet or Expense Report >>
You will be taken to the log in page. Please enter your username and password you created. Click on “show additional criteria”
Under “System”, please enter “AZIMUTHCONFIG”. The other fields can be left blank. Click on LOG IN.
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 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:

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.
Entering a Timesheet:

Next we will break the above screen into sections to better explain each section.
Timesheet Header:

- **New:** Use to open a new timesheet for a new time period
- **Query:** Select the Query option to open a specific timesheet
- **Save:** Select the Save option to save the changes made to your 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
- **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
- **Timesheet Schedule 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
- **Revision:** The revision will display as "1" for a new timesheet. The revision number will be automatically incremented by one every time you save auditable changes
- **Sign:** Employees electronic signature upon completion of timesheet
- **Approve:** Manager electronic signature of approval of employee timesheet
- **Reject:** Manager rejection of employee timesheet
Timesheet Lines:

- **New**: Click this button to add new timesheet lines
- **Copy**: Click to make a copy of an existing timesheet line
- **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 account column and a new dialog box will open up
- **Description**: Defaults based on the Charge Number that is entered
- **PLC**: Your project labor category is optional, and not required
- **Location**: This can be used for the location of your project work
- **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 indirect or direct charge code, or you can simply click on the “Execute” button.
  - Execute will bring up all charge codes that are available to you. Direct charge codes are mapped to each employee specifically, and should only be available to those who are authorized to charge
**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, click Select to add to timesheet.

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, 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.
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 for the entire time period, 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.

By signing this timesheet you are certifying that hours were incurred on the charge and day specified in accordance with company policies and procedures.

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.

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.