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
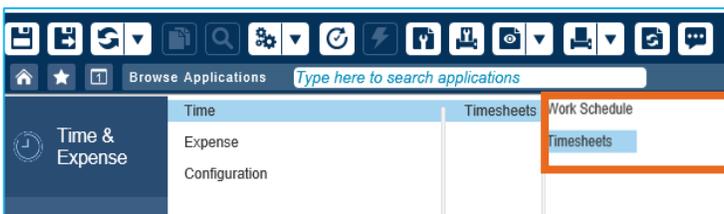
Expense

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.

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.

To create a new timesheet line, click the "Add Line" button.

All buttons to move forward are green.
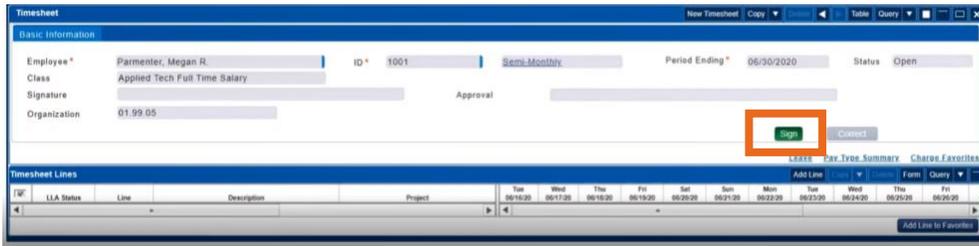
For Timesheet Approvers: The Approval button is green. The Reject button is red.
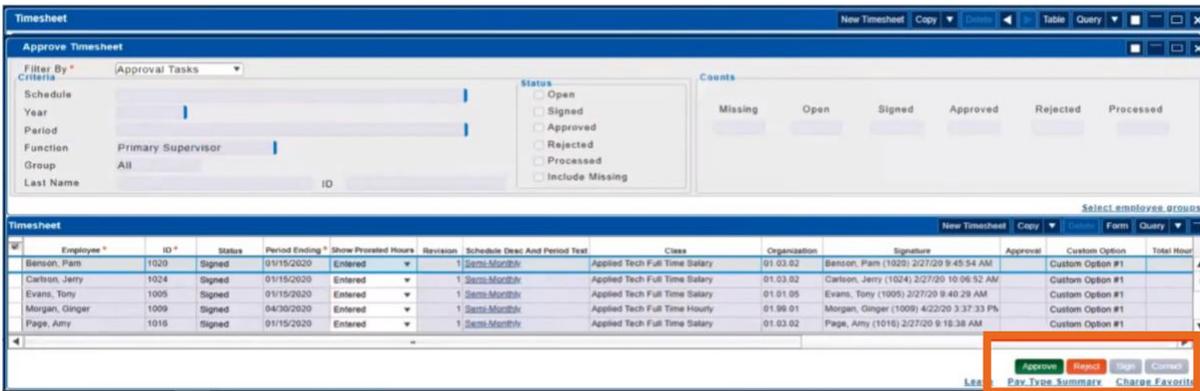
Work Schedule/Request Leave (PTO)

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

2. Click the "New Leave Request" button in the middle of the Work Schedule screen
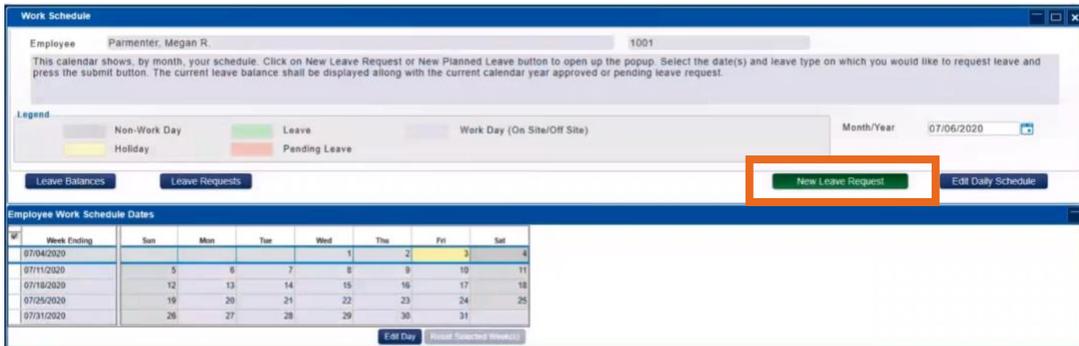
3. In the New Leave window:
    a. Use the calendar icons to change the "From" and "To" dates. You can request a single day or a range.
    b. Use the down arrow in the "Leave Type" field to select the type of leave you are requesting. Your available balance displays
    c. Enter the number of hours 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 ☒ out of the Work Schedule screen(s)
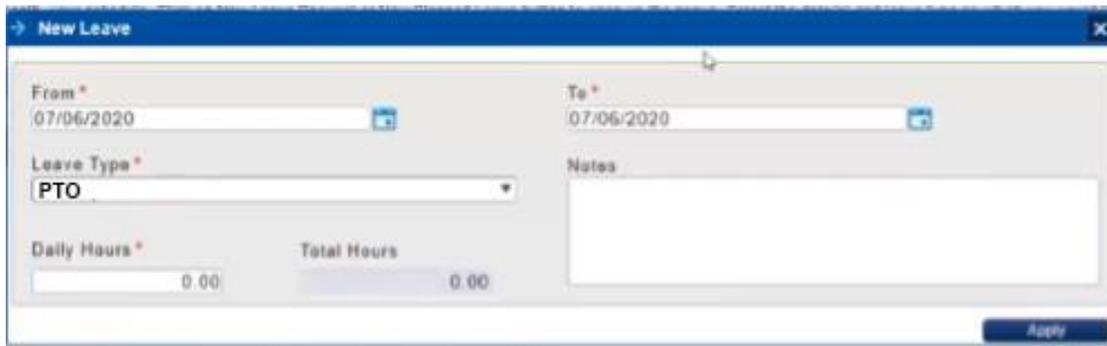
On Your Timesheet

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.
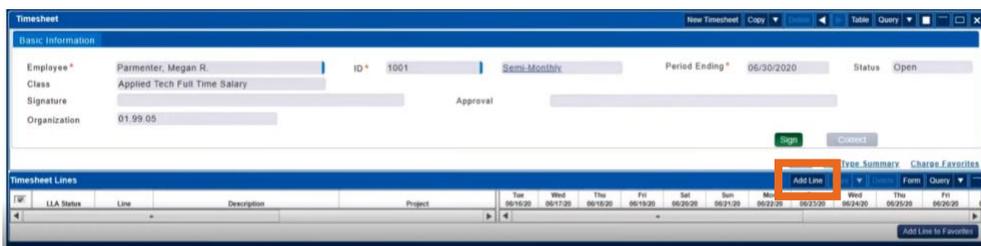
2. Click or tap in the Project field to drill down (i.e., open folders) into the Charge Lookup tree.

3. Click into the "Indirect" folder, then "Fringe Benefits" and select the appropriate Charge Branch Code.
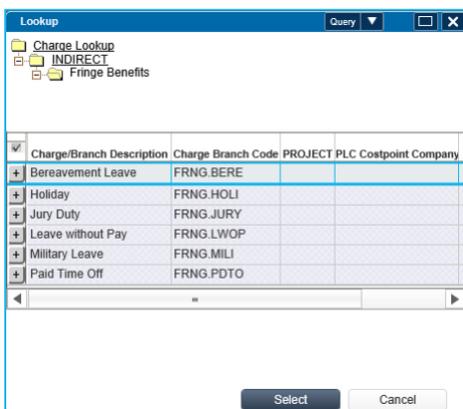
4. Enter hours for the date(s) on the timesheet line(s) that corresponds to the correct Charge Code.

5. Click "Save" to save your timesheet entry.

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.
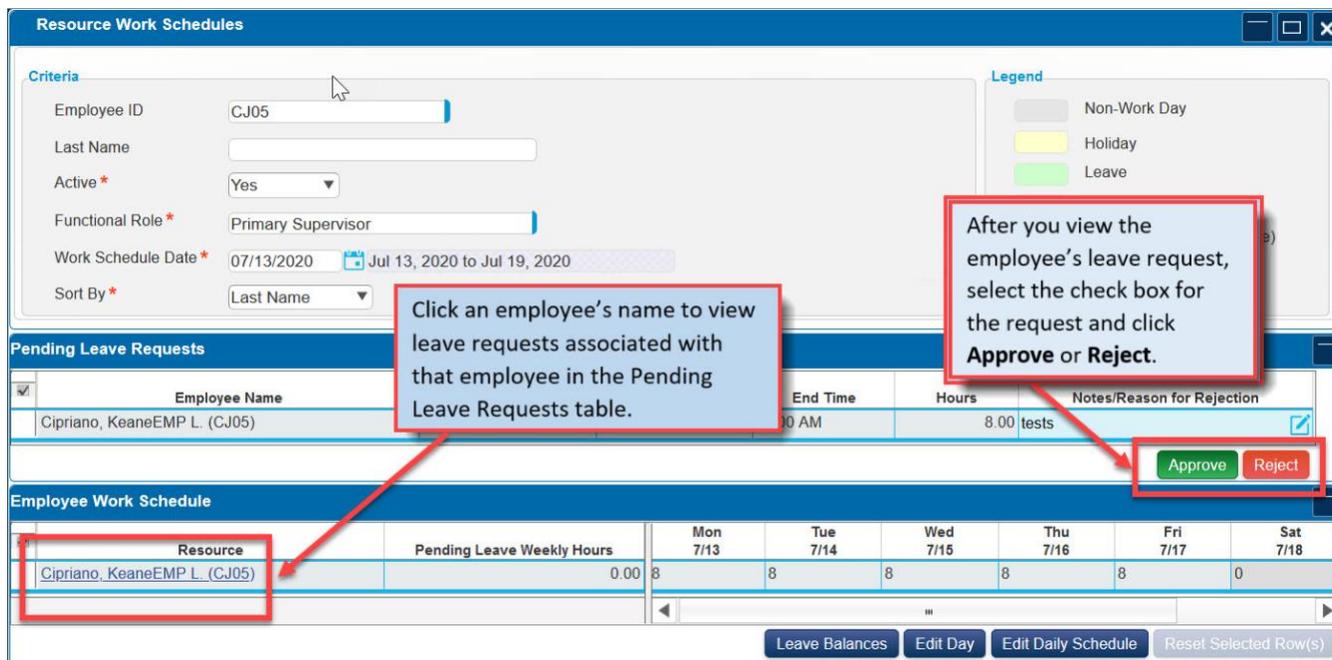
On the Resource Work Schedules screen:

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.