

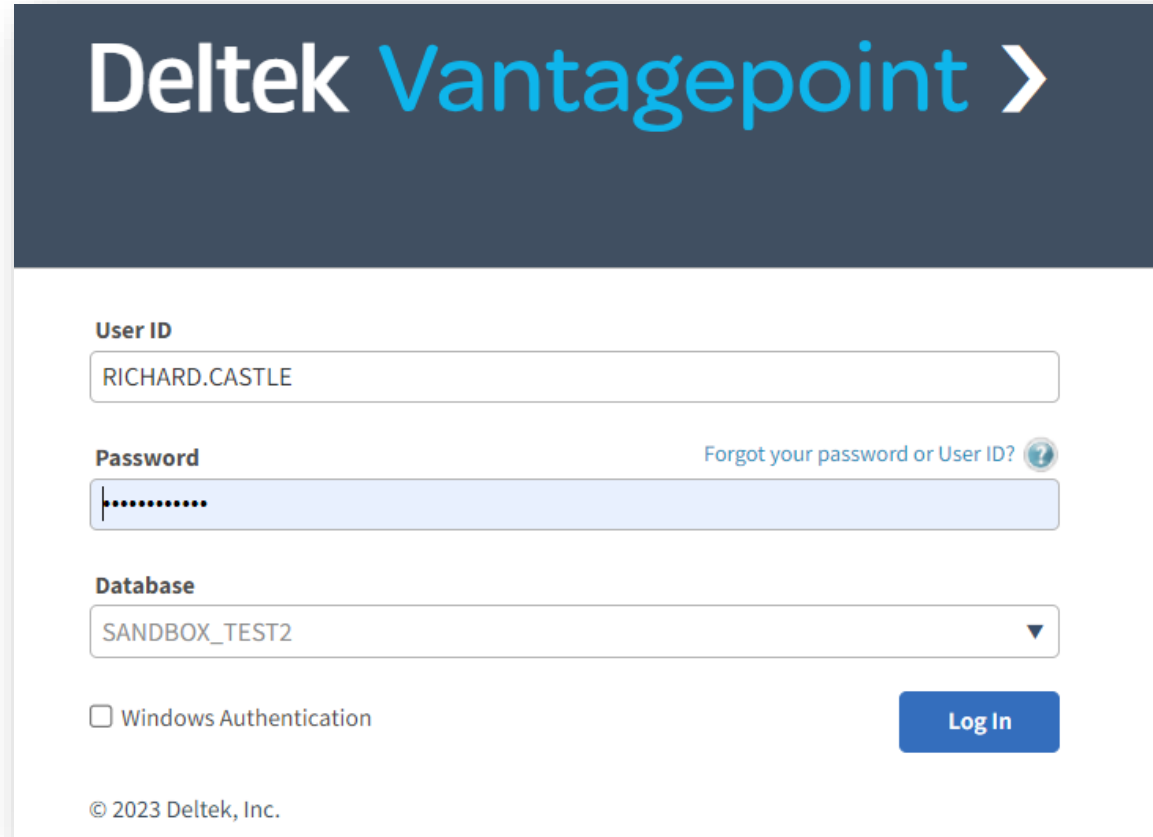
Entering an Expense Report Using the Web Portal

Deltek Vantagepoint



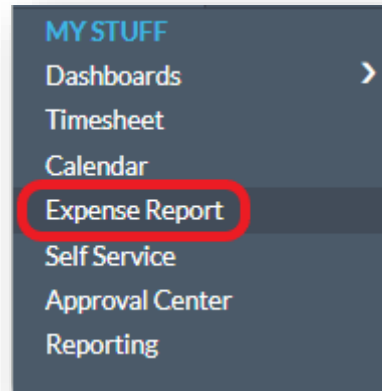
Step 1: Login into Deltek Vantagepoint

- Use the following URL to login into the Vantagepoint Web Portal –
- If using Windows Authentication check the box and click Log In. If not, enter your User ID and Password and then click Log In.



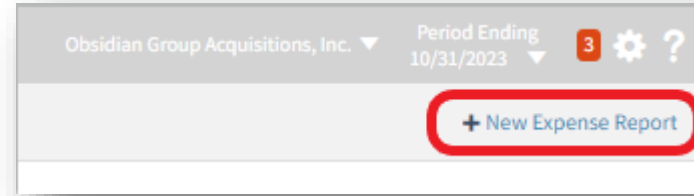
The screenshot shows the Deltek Vantagepoint login interface. At the top, the text "Deltek Vantagepoint" is displayed in white and blue on a dark blue background, followed by a right-pointing chevron. Below this, the login form consists of several fields: a "User ID" field containing "RICHARD.CASTLE", a "Password" field with masked characters and a "Forgot your password or User ID?" link with a question mark icon, a "Database" dropdown menu set to "SANDBOX_TEST2", and a checkbox for "Windows Authentication" which is currently unchecked. A blue "Log In" button is positioned to the right of the checkbox. At the bottom left of the form, the copyright notice "© 2023 Deltek, Inc." is visible.

- Click on Expense Report under “My Stuff” in the Navigation Tree on the left-hand side of the screen.



Step 3: Create a New Expense Report

- In the upper right-hand corner click “New Expense Report”



Expense Report Find expense report Selection No results Save Cancel

Report Name Report Date 8/24/2023

Default Expense Location None

LINE STATUS	*DATE	*CATEGORY	DESCRIPTION	DETAIL	COMP... PAID	*AMOUNT	EXPENSE LO...	TOTAL TAX AMOUNT	NET AMOUNT	*PROJECT	PROJECT NAME	PHASE	PHASE NAME	TASK
						0.00		0.00	0.00					

View: Default

+ Add Line

Total Expenses 0.00
Company Paid 0.00
Total Due 0.00

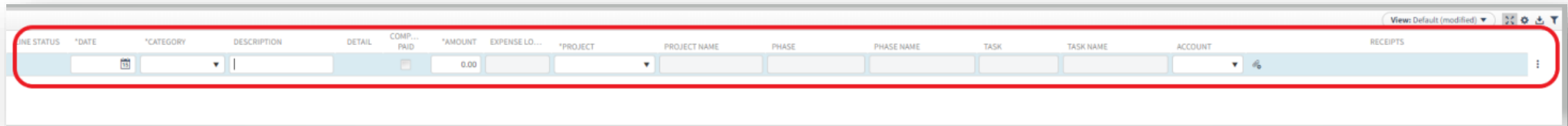
Credit Card Charges (6)

Step 3: Create a New Expense Report Cont.

- Enter a Report Name and the Report Date

The screenshot shows a web form titled "Expense Report". At the top left, there is a search bar with the text "Find expense report". To the right of the search bar are two dropdown menus: "Selection" and "No results". On the far right of the form header are "Save" and "Cancel" buttons. Below the header, there are two input fields. The first field is labeled "Report Name" and is currently empty. The second field is labeled "Report Date" and contains the date "8/24/2023". A red rounded rectangle highlights both the "Report Name" and "Report Date" fields. At the bottom right of the form, there are two small navigation icons: an upward arrow and a leftward arrow.

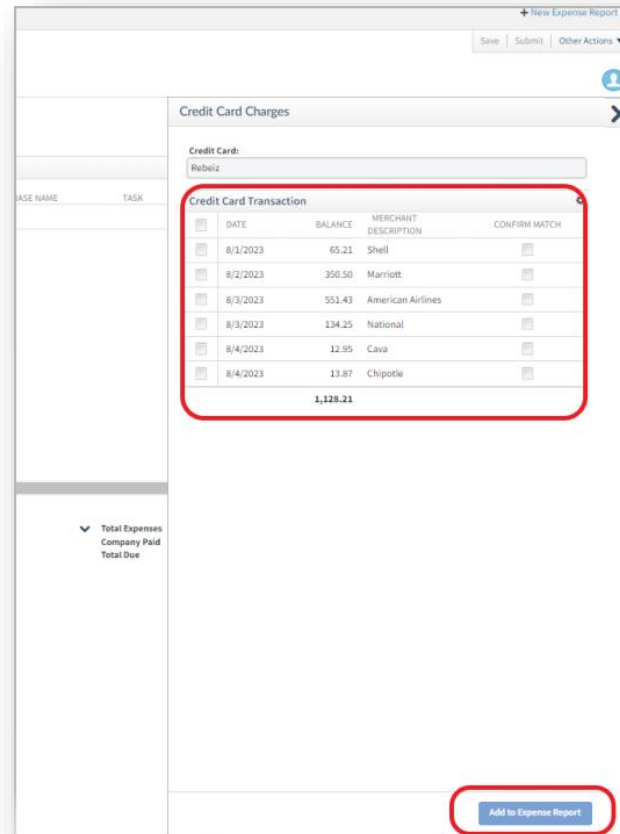
- Add expense line items to the report
 - Date: Enter the date of the charge
 - Category: Select the category the charge is associated with
 - Description: Enter a description for the line item
 - Amount: Enter the total amount for the charge
 - Project: Select the project/phase/task that the charge should apply to
 - Receipts: Attach receipts for all line items, Per Diem and Tolls



LINE STATUS	*DATE	*CATEGORY	DESCRIPTION	DETAIL	COMP... PAID	*AMOUNT	EXPENSE LO...	*PROJECT	PROJECT NAME	PHASE	PHASE NAME	TASK	TASK NAME	ACCOUNT	RECEIPTS
	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="RECEIPTS"/>

Step 5: Adding Credit Card Charges (If Applicable)

- Click the Arrow at the top of the Credit Card Charges Panel to open it up and see the available charges.
- Once open, you can select the charges that you wish to add to your report.
- Once you have selected the charges to add, click “Add to Expense Report” button
- Click the Arrow at the top of the Credit Card Charges Panel to close it.



Step 5: Adding Credit Card Charges (If Applicable)

- With the credit card charges now added to your report. Finish entering the needed information for each line item.
 - Category
 - Detail
 - Project/phase/task
 - Receipt

Expense Report

Find expense report

All In Progress 1 of 1

+ New Expense Report

Save Submit Other Actions

Test 8/8/2023 In Progress
Andrew Rebelz — Contour Engineering, LLC
Last modified 8/8/2023 03:23 pm by Eric Scinto

Default Expense Location
None

LINE STATUS	DATE	CATEGORY	DESCRIPTION	DETAIL	COMP... PAID	AMOUNT	EXPENSE LO...	*PROJECT	PROJECT NAME	PHASE	PHASE NAME	TASK	TASK NAME	ACCOUNT	RECE
	8/1/2023		Shell		✓	65.21									📄
	8/2/2023		Marriott		✓	350.50									📄
	8/3/2023		American Airlines		✓	551.43									📄
	8/3/2023		National		✓	134.25									📄
	8/4/2023		Cava		✓	12.95									📄
	8/4/2023		Chipotle		✓	13.87									📄
					☐	0.00									📄

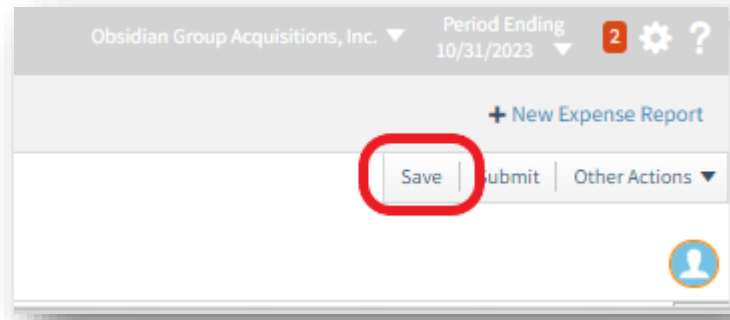
+ Add Line

View: Default (modified)

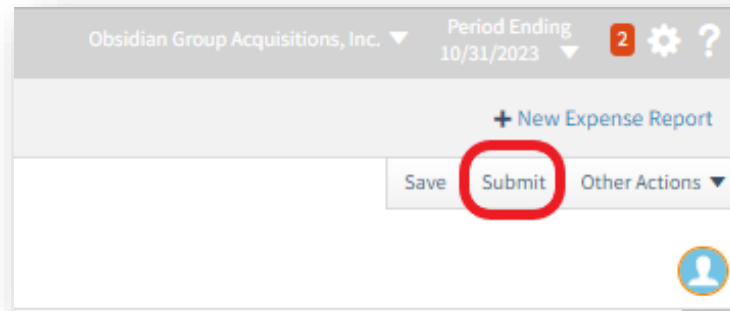
Credit Card Charges (0)

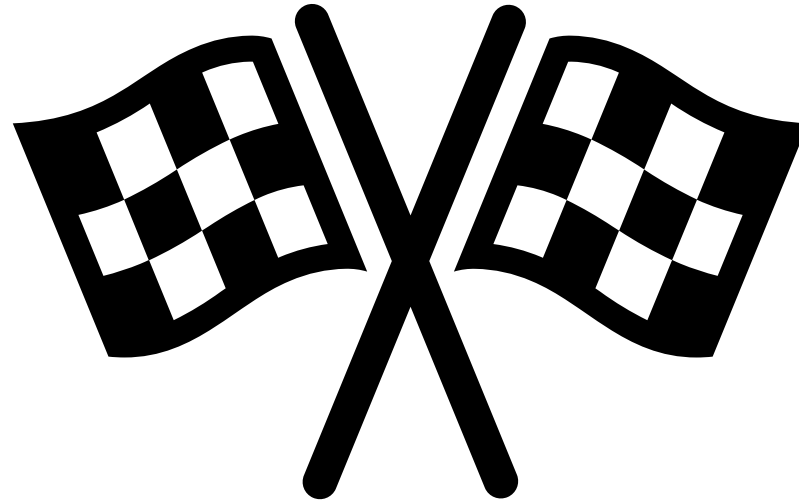
Total Expenses 1,128.21
Company Paid 1,128.21
Total Due 0.00

- Once you are finished updating your expense report you can click “Save”. This will allow you to access the report at a later time.



- Click Submit once you are ready to submit your expense report.





You have now completed this Training Module.