




Deltek

Deltek Costpoint® Mobile Time and Expense in the Cloud

1.0

User Guide

August 10, 2020



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Contents

Overview 1

Getting Started 3

Screen Display 12

Timesheet..... 14

Leave..... 25

Tasks..... 27

Settings Screen 32

Help 37

Log Out..... 38

Appendix A: If You Need Assistance 39

Overview

Costpoint Mobile Time and Expense by Deltek, the native mobile version of the standard timesheet application, enables you to enter, view, and sign timesheet information.

Note: The official name of the application is *Costpoint Mobile Time and Expense*. This document only uses it at first mention. The succeeding instances of the application name display *Costpoint Mobile T&E*.

In addition, the application name in the *Apple App Store* and *Google Play Store* displays *Costpoint Time and Expense*.

This document contains detailed information and instructions on how to use various features of the application.

Note: This version does not yet include the expense application, which is currently scheduled for release in the third quarter of 2020.

Features Not Supported

The following Costpoint Time timesheet features are not available in Costpoint Mobile T&E:

- **Interim Charges:** Interim charges cannot be created in Costpoint Mobile T&E. However, interim charges already in timesheets can be charged. Interim charge edit does occur upon timesheet signing.
- **Hours Proration:** Hours proration is supported but the Day view is limited to entered hours display only. Prorated hours after signing the timesheet will display in the Summary view.
- **Correct Timesheet:** Users will not be able to reverse timesheets within Costpoint Mobile T&E. If a timesheet class requires a reverse timesheet, a user must perform timesheet corrections in a browser-based timesheet.
- **Line Level Approval:** Approvals should be performed in a browser-based timesheet screen.
- **Timesheet Printing:** Users will not be able to print timesheets. They will need to use browser-based timesheets.
- **Timesheet Comments:** Users will not be able to enter/view OVERALL timesheet comments/notes.
- **Subcontractor Time Entry:** Users who are subcontractors will not be able to use Work Assignment charges during time entry.

Specific users will not be able to use Costpoint Mobile T&E based on their timesheet class business rules for the following Costpoint Time & Expense features:

- **Time In/Out:** Users with timesheet classes will not be allowed to use Costpoint Mobile T&E if this feature is enabled. This is checked at login.
- **Start/Stop Time:** Users with timesheet classes with this feature will not be allowed to use Costpoint Mobile T&E if this feature is enabled. This is checked at login.
- **Subcontractor Time Entry:** Users who are subcontractors will not be able to use Work Assignment charges during time entry.

Mobile Devices Requirements

The Costpoint Mobile T&E application supports mobile devices that run on the following operating systems:

- Apple iOS 11 and higher
- Android 8 and higher

Getting Started

Install Costpoint Mobile T&E

1. In the *Google Play Store* or *Apple App Store*, search for the application (*Costpoint Time and Expense*).
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking.

Note: Costpoint Mobile T&E supports Lightweight Directory Access Protocol (LDAP) authentication.

Log Into Costpoint Mobile T&E

1. Tap **Costpoint**.
2. In the **Server URL** field, enter your organization's Costpoint Mobile T&E URL using the format **https://<server>/DeltekTouch/Costpoint/TE**, where <server> refers to the host name of your Costpoint Mobile T&E server.

Note: If you receive the Costpoint Mobile T&E API URL via email, click the link to populate the Costpoint Mobile T&E URL in the **Server URL** field automatically.

3. Tap **Connect**.
4. If Costpoint Mobile T&E is configured to allow Single Sign-On (SSO) through a Security Assertion Markup Language (SAML) Service Provider authentication, tap **SAML/3rd Party Authentication** to **On**. See "[Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication](#)" for more information.

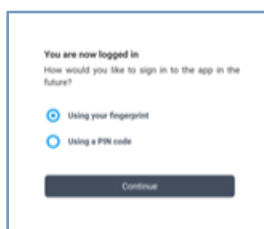
Otherwise, tap the **Username**, **Password**, and **System** fields to enter corresponding values, and tap **Login**.

Note: You may use special characters in your password. However, do not use any of these characters consecutively: @, #, and \$.

5. The application prompts you to review and accept **Terms and Use of Service**. Tap the **Terms and Use of Service** button to review.
6. Tap the **I accept these terms** button to continue.
7. The application prompts you to review and accept **Usage Statistics Tracking**. Toggle the usage tracking off to not allow user tracking in the application. Tap the **I accept these terms** button to continue.

Note: Costpoint Mobile T&E tracks the number of times you access the application and how often you use certain features. It does not track any personal or confidential data, such as user name and companies.

8. The application prompts you select between using PIN or biometric authentication. You can change the setting at any time on the Settings screen.



9. If you choose to login using biometric authentication, the application prompts you to allow access of your face ID or fingerprint.
10. If you choose to cancel, the Costpoint Mobile T&E application displays the PIN screen. Enter a PIN code, which you will use on your succeeding logins. For more information, see [Create Security PIN](#).

Note: Costpoint Mobile T&E remembers your user ID and selected database (and domain, if Windows Authentication is used) on your next login. To log in using a different user ID and database, tap **Change User / Reset PIN**. All your user settings and favorites will be lost.

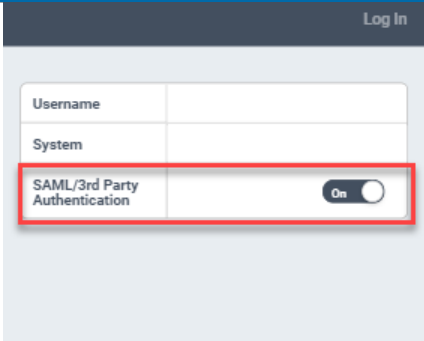
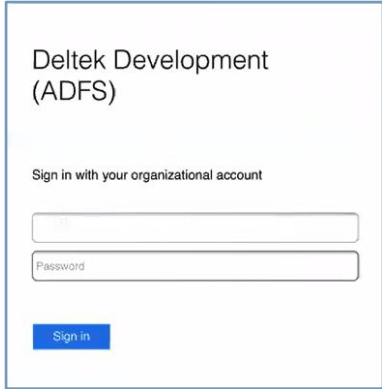
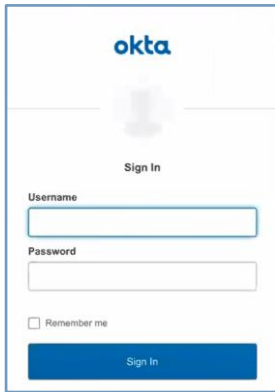
11. If Two-Factor Authentication (2FA) is enabled, the One-Time Passcode screen displays. Enter your credentials. For more information, see [Biometric Authentication and Two-Factor Authentication \(2FA\)](#) and [One-Time Passcode Screen](#) for more information.



If SAML Identity Provider Authentication is enabled, enter your login credentials. For more information, see [Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication](#) and [Biometric Authentication and SAML Identity Provider Authentication](#).


Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication

The following table outlines the steps to log into Costpoint Mobile if SAML SSO is configured.

Step	Description
1	On the Costpoint Mobile T&E Login screen, tap SAML/3rd Party Authentication to On and tap Username and System fields to enter corresponding values.

Step	Description
	
2	<p>Costpoint Mobile T&E redirects you to the SAML Service Provider (ADFS, Azure, Okta, or Ping) Login page where you provide credentials such as user name, passwords, biometrics, certificates, and so on.</p> <div data-bbox="358 783 737 1169">  <p>Microsoft ADSF Login screen</p> </div> <div data-bbox="358 1278 631 1667">  <p>Okta Login Screen</p> </div>

Step	Description
	 <p>Ping Login Screen</p>  <p>MS Azure Login Screen</p>
3	<p>The SAML provider verifies your identity and issues SAML authentication token. You are directed back to Costpoint Mobile T&E, where it verifies your SAML authentication token. If your token is valid, you are allowed to continue with your login and the PIN screen displays.</p>

Step	Description
	

Note: See the "SAML Single Sign-On (SAML SSO) Mode" section in the *Deltek Costpoint Mobile Time and Expense in the Cloud Administrator Guide* for more information.

Biometric Authentication

You can log in to Costpoint Mobile T&E using the biometric authentication feature. This functionality is controlled by a server setting, which, if enabled, allows you to enable or disable the biometric login on the Settings screen in Costpoint Mobile T&E.

Note: For more information on how to enable the biometrics login, refer to the Settings Screen of the *Deltek Costpoint Mobile Time and Expense in the Cloud User Guide*.

You can use the Biometric authentication feature under the following conditions:

- The **ALLOW_BIOMETRICS** setting in the configuration.ini file is set to true. The Costpoint Mobile T&E version 1.0.9 installer will automatically update this setting.
- The Costpoint Mobile T&E Server version 1.0.9 or above and the Costpoint Mobile T&E application version is at 1.0.9 or above.
- You are using a device that support biometric authentication:
 - Fingerprint on Android
 - Touch ID on all supported Apple devices
 - Face ID on all supported Apple devices

Note: Face ID is not yet supported on Android devices although some devices already have this feature.

- The device has at least one fingerprint or a face ID registered. This implies that the device is encrypted and has a passcode, which are required.

Once you upgrade to Costpoint Mobile T&E version 1.0.9 on a device that supports biometric authentication, the application displays a message that biometric authentication is supported and that you can enable it on the Settings screen.

Biometric authentication identifies you using your unique body measurements or characteristics, such as your fingerprint, or your face. Use the fingerprint sensor or face recognition function of your device to set up the biometric authentication. The next time you log into the application, Costpoint Mobile T&E prompts you to use your fingerprint or face. If biometric authentication fails, Costpoint Mobile T&E prompts you to login using your PIN.

Biometric Authentication Behavior on an Android Device

When you log out from an Android device, Costpoint Mobile T&E closes out. When you launch the application again, Costpoint Mobile T&E prompts you to login using your fingerprint. If you tap **Cancel** on the Biometric Login screen, the Login screen displays and asks you enter to your login credentials. If authentication is successful, you are logged into the application without using biometric authentication. The application prompts you to use fingerprint authentication on your next login. When you tap **Cancel** on the Biometric Login screen, and then completely close out Costpoint Mobile T&E, the application prompts you to select between using biometric authentication or PIN on your next login.

Biometric Authentication Behavior on an iOS Device

When you log out from an iOS device and then launch Costpoint Mobile T&E again, the application displays the "Login using Face ID (or Touch ID)" screen. When you completely closes out application, Costpoint Mobile T&E displays the Biometric Login screen.

Biometric Authentication and Two-Factor Authentication (2FA)

You can use biometric authentication with 2FA. If both enabled, the Costpoint Mobile T&E application will validate you using the biometric authentication, followed by your One-Time Passcode login credentials.


Biometric Authentication and SAML Identity Provider Authentication

You can use biometric authentication with SAML Identity Provider Authentication. If both enabled, the Costpoint Mobile T&E application will validate you using the biometric authentication, followed by your SAML Identity Provider login credentials.


Create Security PIN

For initial login, Costpoint Mobile T&E requires you to create a PIN. Instead of entering your user name and password on your next login, you need to enter your PIN.

Note: By default, PIN length is 6 digits, but you can configure it from 4 digits (minimum length) up to 12 digits (maximum length).

1. On the Login screen, enter a PIN and tap .

Note: The minimum number of digits is displayed.

2. Re-enter the PIN to confirm and tap .

Note: If you enter an incorrect PIN three times, you will be asked to log in using your user name and password.

One-Time Passcode Screen

If your Costpoint login is configured for two-factor authentication and Costpoint PIN, the One-Time Passcode screen displays before the PIN screen.





Two-factor authentication (2FA) is an extra layer of security that verifies the identification of users using a combination of two different components, such as the user name/password component and the one-time passcode component.

- **One-time Passcode:** The one-time, 6-digit random number passcode is either generated by Costpoint and securely emailed to a user's email address or generated separately by a user on a mobile device through one of the available 2FA mobile applications, such as Duo Security or Google Authenticator.
- **Permanent PIN:** In addition to a one-time passcode, a user may be asked to verify their identity through a personal four-digit PIN. This PIN is stored in User Preferences and may be required on the login page based on the Costpoint System Settings.

Note: For information on how to set up two-factor authentication using email or mobile application and how to configure the Costpoint PIN, see the [Two-Factor Authentication](#) section in the *Deltak Costpoint 7.1.1 Security Guide* and the [Authentication Tab](#) topic in the Costpoint Online Help.

Log Out of Costpoint Mobile T&E

Tap  and tap . Costpoint Mobile T&E prompts you for your PIN or biometric data on your next login regardless of the timeout period.

If you are using a SAML/3rd party authentication provider, Costpoint Mobile T&E follows the following behavior:

- When you log into Costpoint Mobile T&E using a SAML/3rd party authentication provider on an iOS device, and then you log out, the PIN screen or the Biometric screen displays on your next login.
- When you log into Costpoint Mobile T&E using a SAML/3rd party authentication provider on an iOS device, and then you tap **Forget Me On This Device** or close the application, the SAML/3rd party authentication provider login page displays after the Costpoint Mobile T&E Login screen on your next login.




Note: You should not dismiss or close applications on an iOS device. Apple iOS manages the applications and removes them from memory as needed. When you close an application, it is removed completely from memory, including any active login token you may have with your SAML/3rd party authentication provider. Deltek recommends that you logout from the application (tap **Logout**) when you are done using it.

- When you log into Costpoint Mobile T&E using a SAML/3rd party authentication provider on an Android device, and then you log out, the SAML/3rd party authentication provider login page displays after the PIN screen or the Biometric screen on your next login.

Change User

Use the Change User feature to log into the application using a different username.




To change a user:

1. Tap  and tap .
2. On the PIN screen, tap **Change User**.
3. Tap the **Username**, **Password**, and **System** fields to enter corresponding values.
4. Tap **Log In**.
5. Enter a PIN and tap .

Note: By default, the PIN is 6 digits.

Switching Between Screens in Costpoint Mobile T&E

Costpoint Mobile T&E prompts you to save the timesheet when there is an unsaved timesheet and you perform any of the following actions:


- Navigate to a new timesheet by tapping .
- Navigate to a new timesheet by tapping  when you are not in the timesheet with today's date.
- Tap  and tap any other menu.

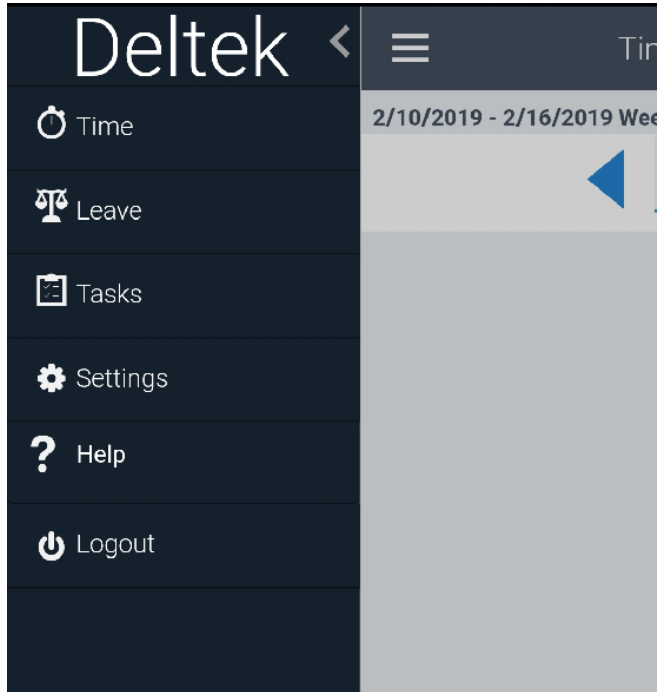
Switching Between Applications on the Device

If you switch between applications on the device, Costpoint Mobile T&E keeps any unsaved changes in the memory as long as the application is still active on your device. If you close the application from the task list or if you turn off your device, changes will be lost.


Note: Changes are only saved in memory with the packaged application and not when accessed through the device browser via a URL.






Screen Display

The Costpoint Mobile T&E user interface has the following menus, which you access by tapping .




Time


Tap  to display the Timesheet screen, which allows you to perform several tasks for your timesheet. The Timesheet screen contains the following buttons:

Timesheet Buttons	Description
	Tap to display the calendar .
	Tap to sign a timesheet .
	Tap to save a timesheet .
	Tap to display the Add Charge screen .
	Tap to display the following: <ul style="list-style-type: none"> ▪ Summary View ▪ Timesheet Search


Leave

Tap  to display the Leave screen, which shows your leave balances by type.


Tasks

Tap  to display the Tasks screen, which shows the tasks you need to perform.


Settings

Tap  to display the Settings screen, which helps you configure the Costpoint Mobile T&E settings.

Help


Tap  to display the Costpoint Mobile Time and Expense Help page, where you can access the Costpoint Mobile T&E User Guide, videos, and learning aids.

Logout

Tap  to log out of the application.

Field Indicators

Several indicators mark the fields on the screen when you add, edit, or configure settings. These indicators are as follows:

- **Required:** You must enter a value in this field in order to continue a task. This field is marked with an asterisk (*).
- **Editable:** This field allows you to enter or select a value. This field is marked with  and allows you to enter or select a value.
- **Read Only:** Fields without a forward arrow are defined by your company, or set by using pre-saved Favorites and are non-editable.

Timesheet


The Timesheet screen allows you to view and change timesheet periods, and create, revise, and submit timesheets.

Note: If you are a new user, you may want to go to Costpoint Time & Expense and load the previous timesheets from Favorites. This way, you can start off with some projects in your first timesheet that you know are valid and you can use on mobile. This makes your first time of using the Costpoint Mobile T&E more convenient.

View Calendar

You use the Calendar screen to quickly select a specific date for which you want to enter or update time.





To view the calendar:

1. On the Timesheet screen, tap .
2. On the Calendar screen, tap **Today** to display the current date and its timesheet entries. Today's date is underlined.

Note: You can also display the Calendar screen using the Summary view.

Change Timesheet Period




To change the timesheet period:

- On the Calendar screen, tap the date for which you want to enter or update time.
The timesheet period that contains the date you selected is displayed on the Timesheet screen. By default, the Timesheet screen displays the date of the current timesheet.
- To view periods or weeks for the previous month, tap . To view periods or weeks for the next month, tap .
- To view periods or weeks for the previous year, tap . To view periods/weeks for the next year, tap .

View Timesheet

The current status and total hours of a timesheet period (in Day view) are displayed on the header of the Timesheet screen.

To view a timesheet:

- On the Timesheet screen, take one of the following actions:
 - Tap  and tap a date.
 - Tap **Today** to display the timesheet containing the current date and its timesheet entries. Today's date is underlined.
- You can perform any of the following tasks:
 - Switch between different days of a timesheet period by swiping the date carousel or tapping a date (for example, if you are on Mon 1, tapping Thu 4 moves the calendar to Thu 4).
 - Tap  or  at either end of the date carousel to go back to the previous period or move to the next (for example, if you are on Mon 13–Sun 19, tapping the next button moves the period to Mon 20–Sun 26).

The selected day is underlined.

Timesheet Status

The status of the selected timesheet and time period is displayed on the header of the Timesheet screen. The status determines which processing options are available to you.


- Missing:** This status indicates a missing timesheet for the selected period. This is available in Costpoint Mobile T&E and indicates that favorite charges are loaded automatically in the background.
- Open:** This status indicates that the timesheet period is current.

- **Signed:** This status indicates that the timesheet has been signed but not yet approved by the resource manager.
- **Approved:** This status indicates that the timesheet has been approved by the resource manager but has not been processed.
- **Rejected:** This status indicates that the timesheet was signed but was rejected by the resource manager.
- **Processed:** This status indicates that the timesheet has been successfully exported.

Add or Edit Timesheet Entries

Costpoint Mobile T&E allows you to perform several tasks for your timesheets. You can enter timesheet data, add or delete a timesheet line, copy a timesheet list, delete a timesheet line, create or delete a favorite, select an activity or task, and reopen a timesheet.

Add Charge/Edit Charge Screen

The Add Charge screen displays when you tap  on the Timesheet screen. The Edit Charge screen displays when you tap an existing charge on the timesheet. Use the Add Charge or Edit Charge screen to perform detailed timesheet entry.

Field	Description
Date	This field displays the selected timesheet date.
Hours	Tap this field to enter the hour value using the time picker.
Hour Comments	Tap this field to enter your comments regarding the hours entered.
Charge Comments	Tap this field to enter your comments regarding a charge.
Favorite	Tap On/Off to set it to On to automatically add the selected charge to Favorites . See Favorite and Autopopulate Fields .
Autopopulate	Tap On/Off to set it to On to automatically add the selected charge to your timesheets. See Favorite and Autopopulate Fields .
Copy Timesheet Line	Tap this to copy a timesheet charge.


Note: The rest of the fields on this screen are user-defined fields. Their labels may change depending on your company's preferences.

Note: The **Allow Lookup** option in the **Timesheet Classes » Pay Type Links** subtask must be selected in order for Costpoint Mobile T&E to use the **Pay Type** UDT. Manual entry in the user-defined fields is not available in the current release. This will be supported in a future release.

Add a Charge to your Timesheet

You add a charge to your timesheet by selecting a charge from your favorite charges or by searching among all available charges.

To add a charge to your timesheet:


1. On the Timesheet screen, tap .
2. On the Lookup screen, perform any of the following actions:
 - Tap **Favorites** to select a charge from your favorite charges.
 - Tap **Lookup Charges** to search among all available charges.

Note: If you do not have a charge added to Favorites, the Lookup screen defaults to **Lookup Charges**.

Note: By default, search is performed by **Project ID**.

- To perform a search using a search type other than Project ID, tap the **Project ID** field, and tap a search type.

Note: Search types are user-defined fields, and their labels may change depending on your company's preferences.

- Enter a value in the **Search String** field and tap  to perform the search.
3. Tap a charge.
 4. On the Add Charge screen, enter the required values, and tap **Done**.


Note: Fields without a forward arrow are defined by your company or set by using pre-saved Favorites and are not editable. Fields with * are required.

The charge is added to your timesheet.

Enter Time on a Timesheet (Quick Entry)

You can quickly enter time on a timesheet by scrolling through the time picker in the timesheet line.

To quickly enter time on a timesheet:


1. Tap the hour field of a selected timesheet line.
2. Scroll through the time picker, and then tap a value.
3. Tap **Done**.
4. Tap  to save your changes.

Note: When you add a new timesheet line, the time picker defaults to the unrecorded remaining hours based on your standard work schedule for a day. For example, your standard work schedule is set to 8 hours a day. If it is your first entry for that day, the time picker defaults to 8. If it is your second time entry and you already entered 3 hours, the time picker defaults to 5.

Enter Time on Timesheet Line (Detailed Entry)

You use the Edit Charge screen to update the details of the selected charge.

To enter time on a timesheet line:

1. On the Timesheet screen, tap anywhere outside the hour field on the timesheet line that you want to edit.
2. On the Edit charge screen, tap the field that you want to update and enter or tap appropriate values.
3. Tap **Done** to display the timesheet in Day view.
4. Tap  to save your changes.

Copy a Timesheet Charge from the Timesheet Screen

You can copy a timesheet charge from the Timesheet screen or the Edit Charge screen.

To copy a timesheet charge:

- To copy a timesheet charge from the Timesheet screen:
 1. Tap the date that you want to copy.
 2. Touch and hold the charge until a pop up menu displays, and tap **Copy Charge**.
- To copy a timesheet charge on the Edit Charge screen:
 1. Tap an existing charge.
 2. On the Edit Charge screen, tap **Copy Timesheet Line**.

Delete a Timesheet Charge from the Timesheet Screen

To delete a timesheet charge, take one of the following actions:

- Swipe the timesheet charge and tap **Delete**.
- Touch and hold the charge until a shortcut menu displays, and tap **Delete Charge**.
- Tap the charge, and then tap **Remove from Timesheet** on the Edit Charge screen.


Note: You cannot remove a timesheet line from the timesheet if the line was saved previously. In this case, the system zeroes out the hours. This behavior is due to audit constraints.

Favorites


Favorites are saved combinations of projects, tasks, and activities, which give you easy access to them when doing time registration.

Add a Charge to Favorites

To add a charge to Favorites:

1. On the Timesheet screen, tap .
2. On the Lookup screen, tap **Lookup Charges**.
By default, search is performed by Project ID.
3. To perform a search using a search type other than project IDs, tap the **Project ID** field and tap a search type.



Note: Search types are user-defined fields and their labels may change depending on your company's preferences.

4. Enter a search string in the **Search String** field, and tap  to perform the search.
5. Tap the charge that you want to add to **Favorites**.
6. Tap **On/Off** in the **Favorite** field to set it to **On**.
7. Tap **Done**.

Delete a Favorite

Remove a charge from the Favorites list by deleting it.

To delete an entry from Favorites:


1. On the Timesheet screen, tap .
2. On the Lookup screen, tap **Favorites**.
3. Swipe the timesheet charge that you want to delete from the list and tap **Delete**.
Costpoint Mobile T&E prompts you to save the timesheet to complete the delete operation.
4. Tap **Yes**.
5. On the Timesheet screen, tap  to save your changes. The charge is now deleted from **Favorites**.

Favorite and Autopopulate Fields

The following table describes the behavior of the **Favorite** and **Autopopulate** fields depending on your action on a specific screen.





Screen	Action	Behavior
Add Charge Screen	Add a charge from the Favorites list	The Favorite field is set to ON . If the selected Favorite has the Autopopulate field set to On , the Autopopulate field on the Add Charge screen is set to On .
Add Charge Screen	Add a charge using the Lookup Charges to search among all available charges (not from the Favorites list)	The Favorite and Autopopulate fields on the Add Charge screen are set to Off .
Edit Charge Screen	Edit an existing charge	The values in Favorite and Autopopulate fields depend on the values set in the Default Add to Favorites and Default Autopopulate fields on the Settings screen.

Save a Timesheet

After you make any changes, tap  to save the updated timesheet line to the Time and Expense server.

Error and Warning Indicators

If there is a problem when saving a timesheet, Costpoint Mobile T&E displays a corresponding error or warning indicator to help you easily identify the lines that you need to address.


Icon	Description
	This icon indicates an error in the timesheet line. A timesheet with an error cannot be saved until the error is resolved. Tap  to return to the timesheet and correct it before submitting.
	This icon indicates a warning in the timesheet line. You can either tap Continue to submit the timesheet or tap  to return to the timesheet and make changes.

Enter or Select Revision Explanations

You can use preset revision explanations when you make changes to a timesheet in Costpoint Mobile T&E if Costpoint Time & Expense is configured for it.


Note: For more information, see [Step 9 — Configure Preset Revision Explanation Feature in the Deltek Time & Expense 10.0 Post-Installation Configuration Guide](#).

To enter or select an explanation for revisions made:

1. On the Timesheet screen, tap the charge that you want to update.
2. Tap the field that you want to update, and enter or tap appropriate values.
3. Tap **Done**.
4. Tap  to save your changes.

The Revision Explanation screen displays with the following details:



- **Line No:** This row displays the specific timesheet line that has been revised.
- **Date:** This row displays the date when the revision was made.
- **Revision Audit Detail:** This row displays the revision details.

5. Enter a note to explain the revision made, or tap  to select an appropriate explanation from the list.
6. Tap **Done**.

Sign a Timesheet on the Timesheet Screen

You sign a timesheet to submit it for approval.

To sign a timesheet:

1. On the Timesheet screen, tap .
If there is a problem with the timesheet you are saving, the screen displays errors and warnings.
Tap **Continue** to submit the timesheet, or tap  to return to the timesheet and make changes.
2. Tap **OK**.



Note: The timesheet status is changed to **Signed**. The timesheet is sent back to the resource, and the **Approve Timesheets** indicator on the Tasks screen of the resource manager is automatically updated to reflect the signed timesheet.

Summary View

Use the Summary view to display timesheet data such as days submitted for each timesheet, and the hours submitted per charge or per pay type. You can also use this view to display the revision history of the timesheet using the audit information.

View Calendar on the Summary View

To view the calendar:

1. On the Timesheet screen, tap  and tap **View Summary**.
2. Tap  and tap **Calendar**.

Sign a Timesheet on the Summary View

To sign a timesheet:

1. On the Timesheet screen, tap  and tap **View Summary**.
2. Tap  and tap **Sign**.

If there is a problem with the timesheet you are saving, the screen displays errors and warnings.


Tap **Continue** to submit the timesheet, or tap  to return to the timesheet and make changes.

3. Tap **OK**.

Note: The timesheet status is changed to **Signed**. The timesheet is sent back to the resource, and the **Approve Timesheets** indicator on the Tasks screen of the resource manager is automatically updated to reflect the signed timesheet.

View Timesheet Summary

To view timesheet summary:

1. On the Timesheet screen, tap  and tap **View Summary**.

Note: If a timesheet is set up for a particular schedule (period within a schedule), text is displayed next to the timesheet period.

2. On the Summary screen, tap any of the following tabs to filter your view:
 - **Day:** Tap this tab to display the hours you submitted for each day of the selected timesheet period, including any overtime charges. It also displays the status of the timesheet and the total hours.

Note: You can view the charge details submitted for each day if the **Show Charge Detail in Day Summary** option on the Settings screen is set to **On**.

Note: Tapping a date in the Day view displays the timesheet for that date, where you can make any necessary revisions.

- **Week:** Tap this tab to display the hours submitted per week for the selected timesheet, including any overtime charges.
- **Charge:** Tap this tab to display the hours per charge that you submitted for the selected timesheet, including any overtime charges. It also displays the status of the timesheet and the total hours.

Note: Tap a charge to display the Charge screen. The Charge screen displays the number of hours submitted per day for the charge you tap.


- **Pay Type:** Tap this tab to display the hours per pay type that you submitted for the selected timesheet. It also displays the status of the timesheet and the total hours.

Note: Cost-only charge is indicated by an asterisk (*).

View Audit Information

Use the audit information to see the revision history of a timesheet, which includes signature and approval details, explanation for the revisions, and any warnings received.

To view audit information:

1. On the Summary screen, tap , and then tap **Audit**.
2. On the Audit screen, tap any of the following tabs to filter your view:
 - **Status:** Tap this tab to display the signature and approval details (approver and date of approval) for the current timesheet revision.
 - **Revision:** Tap this tab to display the explanation for any revisions made to the timesheets.
 - **Warnings:** Tap this to display the warnings you received when you saved and/or signed the timesheet.

Timesheet Search

Typically, the primary role that performs approval, the resource manager, has tasks created based on the system setup. However, for backup resource managers, for example, the tasks are not created unless a process is run to escalate the tasks to them. If you are a backup resource manager, you can use the Search screen to find signed timesheets that require approval.

Use the Search screen to search for existing timesheets based on specified criteria.

Note: Timesheet search is only available to resources with rights to view or approve other resources' timesheets.

Field	Description
Period	Tap this field to select a period to perform the timesheet search. <ul style="list-style-type: none"> ▪ Schedule ▪ Year ▪ Period Ending This field is optional.
Function	Tap this field to select the resource's functional role. This field defaults to the resource's role that takes precedence over other resources.
Group	Tap this field to select the resource's group.
Last Name	Tap this field to enter the last name of the user. This field is optional.

Field	Description
ID	Tap this field to enter the ID of the user. This field is optional.
Timesheet Status	<p>Tap to select the timesheet status to search.</p> <ul style="list-style-type: none"> ▪ Open ▪ Signed ▪ Approved ▪ Rejected ▪ Processed <p>Tap at least one timesheet status to perform a search.</p>


Search Timesheets

You specify the required fields on the Timesheet screen to perform a search, select a timesheet that from the list, and perform the appropriate task such as approving a timesheet or viewing its audit information.


To search timesheets:

1. On the Timesheet screen, tap , and tap **Timesheet Search**.
2. Tap the appropriate fields to enter or tap the appropriate values.

Note: If you are a backup resource manager, tap the **Function** field and tap **Backup Supervisor** (or tap the function that corresponds to a backup resource manager role as defined by your company).

3. Tap . The application displays the timesheets that match the criteria you specify.
4. On the Search screen, tap the check mark next to the timesheet that you want to view.

Note: Tap **Select All** to select all timesheets in the list.

5. Tap **Review**. The timesheet displays on the [Review screen](#).
6. Tap , and perform any of the following options:
 - Tap **Approve** to approve the selected timesheet.
 - Tap **Reject** to reject the selected timesheet.
 - Tap **Audit** to view the audit information of the selected timesheet.
 - Tap **Day View** to view the selected timesheet in Day view.

Note: The values that you specify in the **Function**, **Group**, and **Timesheet Status** fields remain as long as you are logged into the application.

Leave

The Leave screen allows you to view your leave balances by type.

Leave	
Vacation	12.00 >
Sick Leave	26.00 >
Holiday Leave	12.00 >

Use the Leave screen to view the following:

- Leave balances by leave type. Examples of leave types are holiday, vacation, and sick leave.



Note: The leave types displayed are based on your company's configuration.

- Beginning Balance by leave type
- Number of leave hours accrued by leave type
- Number of leave hours taken by leave type
- Adjustments by leave type
- Number of leave hours available by leave type
- Leave transaction details

View Leave Balances


You view your available leave balances prior to submitting a leave request.

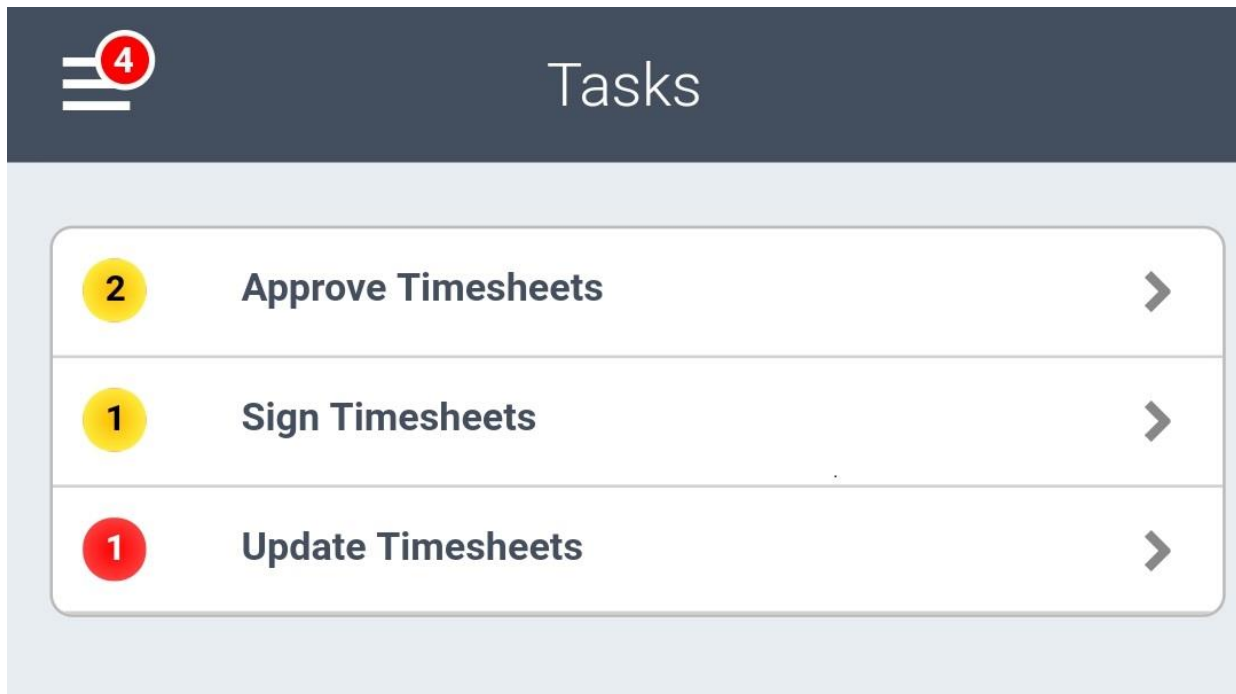
To view leave balances:

1. Tap  and tap .
2. On the Leave screen, tap the Leave type that you want to view the details.

Tasks



The Tasks screen shows you various tasks that you need to perform, depending on your role. These may include tasks such as updating your timesheet or approving timesheets, if you have such rights.

The number of tasks that you have to perform is indicated in the main menu. For example,  indicates that you have 4 tasks.



Task notifications are also color-coded based on priority level.

- **Red:** This color indicates that at least one task of this type is high priority.
- **Yellow:** This color indicates that at least one task of this type is medium priority and no other task of this type is high.
- **Black:** This color indicates that all tasks of this type are low priority.


Tapping  and then  displays the Tasks screen, with tasks arranged into categories. The following table describes each task category and to which role the category is available.

Task Category	Description	Resource Manager	Resource
Approve Timesheets	This task category is displayed and available only for resource managers. Tap Approve Timesheets to display the timesheets that are ready for review and approval. Tap a timesheet to display it on the Review screen. See Approve a Timesheet .	✓	

Task Category	Description	Resource Manager	Resource
Sign Timesheets	This task category is displayed and available for resources and resource managers. Tap Sign Timesheets to display the timesheets that you need to sign because a resource manager (or someone else) previously signed it. Timesheets that are not signed by the owner are marked Signed (in red text). If there is only one timesheet to sign, tapping Sign Timesheets displays the timesheet. If there are multiple timesheets to sign, tapping Sign Timesheets displays the list of timesheets. See Sign a Timesheet on the Tasks Screen .	✓	✓
Update Timesheets	This task category is displayed and available for resources and resource managers. Tap Update Timesheets to display the timesheets that you need to check and update. If there is only one timesheet to update, tapping Update Timesheets displays the timesheet. If there are multiple timesheets to update, tapping Update Timesheets displays the list of timesheets. See Update a Timesheet .	✓	✓

Review Screen

The Review screen allows resource managers to review a timesheet before approving it. The Review screen displays when a resource manager performs any of the following actions:

- **On the Tasks screen:** Tap **Approve Timesheets**, and tap the timesheet that you want to view.
- **On the Timesheet screen:** Tap  , tap **Timesheet Search**, and perform a search. On the [Search screen](#), tap the check mark next to the timesheet that you want to view, and tap **Review**.


Tapping a timesheet displays the following details:

- Resource User Name
- Timesheet period ending date
- Status of the selected timesheet
- Number of revisions made to the selected timesheet
- Total hours submitted for that timesheet period, which include the regular hours and any overtime charges

Tap any of the following tabs to filter your view:

- **Day:** Tap this tab to display the hours submitted for each day of the selected timesheet period, including any overtime charges.
- **Week:** Tap this tab to display the hours submitted per week for the selected timesheet, including any overtime charges.

- **Charge:** Tap this tab to display the hours per charge that you submitted for the selected timesheet, including any overtime charges.
- **Pay Type:** Tap this tab to display the hours per pay type that you submitted for the selected timesheet.








Tap  and tap **Audit** or **Day View** to view the [audit information](#) of the particular timesheet or the hours submitted for each day of the selected timesheet period.

Approve a Timesheet

This task only applies to resource managers.

Note: If you are a backup resource manager, you can use the [Search screen](#) to search for signed timesheets that waiting to be approved.

To approve a timesheet:

1. On the Tasks screen, tap **Approve Timesheets**.
 - If there is more than one timesheet to approve, tapping **Approve Timesheets** displays the timesheet list. Tap a timesheet to display it on the Review screen.
 - If there is only timesheet to approve, tapping **Approve Timesheets** displays the timesheet on the Review screen.
2. On the [Review screen](#), review the timesheet details.
3. To approve the selected timesheet, perform one of the following actions:
 - Tap .
 - Tap  and tap **Approve**.
 - Tap  and tap Day view. In Day view, tap  or tap , and then tap **Approve**.
If there is a problem with the timesheet, the screen displays errors and warnings.
4. If you have more than one timesheet to approve, the Review screen displays the next timesheet. Tap  to display the next timesheet or  to display the previous timesheet.

Reject a Timesheet


This task only applies to resource managers.

To reject a timesheet:

1. On the Tasks screen, tap **Approve Timesheets**.
 - If there is more than one timesheet to approve, tapping **Approve Timesheets** displays the timesheet list. Tap a timesheet to display it on the Review screen.
 - If there is only one timesheet to approve, tapping **Approve Timesheets** displays the timesheet on the Review screen.

2. Tap , and tap **Reject**.

If there is a problem with the timesheet, the screen displays errors and warnings.

3. On the Revision Explanation screen, enter a note to explain the revision made or tap  to select an appropriate explanation from the list.
4. Tap **Done**.

Note: The timesheet status is changed to **Rejected**. The timesheet is sent back to the resource, and the **Update Timesheets** indicator on the Tasks screen (of the resource) is automatically updated to reflect the rejected timesheet.


5. If you have more than one timesheet to approve, the Review screen displays the next timesheet.

Tap  to display the next timesheet or  to display the previous timesheet.


Sign a Timesheet (on the Tasks Screen)

You sign a timesheet that was previously signed by a resource manager (or someone else) and submit it for approval.

To sign a timesheet:

1. On the Tasks screen, tap **Sign Timesheets**.
 - If there is more than one timesheet to sign, tapping **Sign Timesheets** displays the timesheet list. Tap a timesheet to display it on the Timesheet screen.
 - If there is only timesheet to sign, tapping **Sign Timesheets** displays the timesheet on the Timesheet screen.
2. On the Timesheet screen, tap  to sign a timesheet.

If there is a problem with the timesheet you are saving, the screen displays errors and warnings.

Tap **Continue** to submit the timesheet, or tap  to return to the timesheet and make changes.
3. Tap **OK**.

Note: The timesheet status is changed to **Signed**. The **Approve Timesheets** indicator on the Tasks screen of the resource manager is automatically updated to reflect the signed timesheet.


Update a Timesheet

Note: If a timesheet is set up for a particular schedule (period within a schedule), text is displayed next to the timesheet period.

To update a timesheet:

1. On the Tasks screen, tap **Update Timesheets**.

Tasks

- If there is only one timesheet period to update, tapping **Update Timesheets** displays the timesheet on the Timesheet screen.
 - If there are multiple timesheet periods to update, tapping **Update Timesheets** displays the list of timesheets.
2. On Timesheet screen, perform the necessary updates. You can modify hour values, delete charges, add charges, and modify charge details
 3. Tap  to save your changes.

Settings Screen


Use the information in this section to configure Costpoint Mobile T&E on your device.

Settings	
Usage Tracking	On <input checked="" type="checkbox"/>
Mobile Hours Increment	Quarter ▼
Display Non-work Days	Off <input type="checkbox"/>
Default Add to Favorites	Off <input type="checkbox"/>
Default Autopopulate	Off <input type="checkbox"/>
Show Charge Detail in Day Summary	On <input checked="" type="checkbox"/>
Timesheet Line Sort	Line Number ▼
Time Zone	
Visual Confirmation	No Confirmation ▼
Help	>
About	>
Privacy Policy	>
Change Pin	
Forget Me On This Device	

Configure Costpoint Mobile T&E Settings


Use the Settings screen to view or modify the Costpoint Mobile T&E settings.

To configure Costpoint Mobile T&E settings:

1. Tap  and tap **Settings**.
2. You can view or modify the following fields:

Field	Description
User Name	This field displays the name (First Name/Middle Initial/Last Name) of the user currently logged into the application.
Domain	This field displays the database name.
Login using Fingerprint/Face ID	Tap On/Off to enable or disable the biometric login on your device.
Usage Tracking	Tap On/Off to enable or disable usage tracking using Google Analytics. When enabled (On), Google Analytics receives information about your use of Costpoint Mobile T&E (for example, the number of times you access the application). Deltek uses this information to determine what features are being used in the application. No confidential information (such as companies and user names) is tracked. This anonymous information is only available to Deltek and is not publicly available.
Mobile Hours Increment	<p>Tap to set how the hours are entered and displayed on the device. Your options are Whole, Half, Quarter, and Tenth. The options displayed are valid only for your Timesheet Class. For example, if Timesheet Class is set to:</p> <ul style="list-style-type: none"> ▪ Whole: The picker displays hours in whole numbers, for example, 1.00. ▪ Half: The picker displays hours in whole numbers and in half-hour increments, for example, 1.50. ▪ Quarter: The picker displays hours in whole numbers and in quarter-hour increments, for example, 1.25, 1.50. ▪ Tenth: The picker displays hours in whole numbers and in tenth of an hour increments, for example, 1.10, 1.20.
Display Non-work Days	<p>Tap On/Off to set the days that will be displayed on the timesheet.</p> <ul style="list-style-type: none"> ▪ Tap On to display non-work days.

Field	Description
	<ul style="list-style-type: none"> Tap Off to display only work days. (Flexible days are displayed if the Work Schedule is set.)
Default Add to Favorites	<p>Tap On/Off to configure the Favorite option on the Edit Charge screen.</p> <ul style="list-style-type: none"> Tap On to set the default value of the Favorite option to On. Tap Off to set the default value of the Favorite option to Off.
Default Autopopulate	<p>Tap On/Off to configure the Autopopulate option on the Edit Charge screen.</p> <ul style="list-style-type: none"> Tap On to set the default value of the Autopopulate option to On. Tap Off to set the default value of the Autopopulate option to Off.
Show Charge Detail in Day Summary	<p>Tap On/Off to set your view on the Day tab of the Summary screen.</p> <ul style="list-style-type: none"> Tap On to view the charge details submitted for each day of the selected timesheet period. Tap Off to view only the total number of hours you submitted for each day of the selected timesheet period.
Timesheet Line Sort	<p>Tap to sort the charges on your timesheet by:</p> <ul style="list-style-type: none"> Line Number: This is set by default. Charge ID Charge Description <p>Changes made to the sorting order are applied when you save the timesheet.</p>
Time Zone	<p>This field displays the selected time zone and is not editable.</p>
Visual Confirmation	<p>Tap to have Costpoint Mobile T&E display a confirmation message after you perform an action such as saving a timesheet, signing a timesheet, or approving a timesheet. Your options are:</p> <ul style="list-style-type: none"> No Confirmation: Tapping this option does not display a confirmation message after you perform an action. Timed Confirmation: Tapping this option displays a confirmation message for three seconds and then closes it. Or you can tap OK to close the confirmation


Field	Description
	<p>message before 3 seconds. This is the default setting.</p> <ul style="list-style-type: none"> ▪ Action Confirmation: Tapping this option requires you to tap OK to close the confirmation message.
Help	<p>Tap to display the Costpoint Mobile Time and Expense Help page, where you can access the Costpoint Mobile T&E User Guide, videos, and learning aids. You can also access Help by tapping  and tapping Help.</p>
About	<p>Tap to view the device and operating system information, which includes the following:</p> <ul style="list-style-type: none"> ▪ Device Type ▪ Operating System ▪ User Agent Name and Version ▪ Application (Native App or Web App) Version ▪ Touch Server Version ▪ Web Service Version ▪ Deltek Costpoint (Version 7.1.1 or higher) ▪ Touch Server Build ▪ Native App Build (1.0.0.xx) ▪ Web App Build <p>You can also send the same information to an email address by tapping Email Info. This information may be requested by Deltek support if you have an issue with the application.</p>
Privacy Policy	<p>Tap to view the Legal Notices and Privacy Statement information page of Deltek.</p>
Change PIN	<p>Tap to create a new PIN code. See Change PIN.</p>
Forget Me On This Device	<p>Tap to delete all information details from the application, including login information and settings. See Delete Information from the Application.</p>

Enable or Disable Usage Tracking

Usage tracking keeps a record of the number of times you accessed Costpoint Mobile T&E and the features that you used.

Note: Usage tracking does not track any personally identifiable data or confidential information such as company and contact names.




To enable or disable usage tracking:

1. Tap  and tap **Settings**.
2. Use the **Usage Tracking** slider to enable (**On**) or disable (**Off**) usage tracking.

Change PIN

Create a new PIN to use when logging into the application.


To change PIN:

1. Tap  and tap **Settings**.
2. Tap **Change PIN**.
3. On the Login screen, enter a PIN and tap .
4. Re-enter the PIN to confirm, and tap .


Delete Information from the Application

Use the Forget Me On this Device feature to delete all information details from the application, including login information and settings.


To delete information from an application:

1. Tap  and tap **Settings**.
2. Tap **Forget Me On This Device**. The application closes. On your next login, you are required to enter your user ID, password, and database information.

Help

Tap  and tap **Help** to display the Costpoint Mobile Time and Expense Help page, where you can access the Costpoint Mobile T&E User Guide, videos, and learning aids.

Log Out

Tap  and tap **Log Out** to exit the application, requiring you to enter your password or PIN on your next login.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Costpoint Mobile T&E, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Additional Documentation

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
<i>Deltek Costpoint Mobile Time and Expense Release Notes</i>	This document contains a summary of the technical considerations, major features, and known issues of the application.
<i>Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide</i>	This document provides instructions for the installation and configuration of application.



About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com