Deltek

Deltek Costpoint® Mobile Time and Expense 2.0

Frequently Asked Questions

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Overview

This document presents frequently asked questions related to Costpoint Mobile Time and Expense 2.0.

Costpoint Mobile T&E Questions and Answers

Here are some of the commonly asked questions to give you more information about Costpoint Mobile T&E.

Expense

After I capture a receipt and tap **Submit**, why do I get the “Missing Batch Type for Manual Expense” error?

Your company has not set up the expense batch type **MANUAL** in your Costpoint Time and Expense system. This batch type must be set up first in order for the Expense Capture Receipt feature to work.

> **Attention:** See "Step 10: Set Up the “MANUAL” Batch Expense Type " in the *Costpoint Mobile Time and Expense Technical Installation and Configuration Guide* for more details.

Why can I see the Expense Reports tab but not the Outstanding Expenses tab and the Capture Receipt menu option in the Costpoint Mobile T&E application?

You must have rights to the **EPMEXPOUTSTANDING** application in order to access the Capture Receipt and Outstanding Expenses features of the Costpoint Mobile T&E application. Contact your Costpoint Administrator for more information if you feel you should have access to these functions.

Why don’t I see the Capture Receipt or the Expense Reports menu option in the Costpoint Mobile T&E application?

You are either not licensed for the Expense module or your administrator does not allow you to access the Mobile Expense features of the Costpoint Mobile T&E application. Contact your Costpoint Administrator for more information if you feel you should have access to these functions.

> **Attention:** See “Contents of the Screen Display “in the Costpoint Mobile T&E Help for more details.

How do I add my captured receipt to an expense report?

There are 2 ways to add a captured expense to an expense report.

- After capturing the image, verifying the data, and saving the receipt, tap **Save to Expense Report** on the Add Expense screen.
- On the Expense Reports screen, tap an existing expense report, and then tap . On the Expense Details screen, tap the **Expense Type** field, and then tap an expense type. Tap the **Outstanding Expense** field, and then tap a captured receipt from the list of outstanding expenses that matches your selected expense report type.

> **Attention:** See "Adding an Outstanding Expense to an Existing Expense Report" in the Costpoint Mobile T&E Help for more details.

After using Capture Receipt, why doesn't data from my captured receipt populate the fields on the Add Expense screen?

Costpoint Mobile T&E did not perform ICR processing on the captured receipt. Make sure that the **ICR for expenses** option on the Settings screen of the Costpoint Mobile T&E application is set to **On**. Also, check with your Costpoint Administrator and make sure that your company allows ICR processing of captured receipts.

> **Attention:** See "Capture Receipt" in the Costpoint Mobile T&E Help for more details.

Timesheet

How do I get a predefined explanation when I make changes to a timesheet?

When you make changes to a timesheet, the preset revision explanations display in the application only if Costpoint Time & Expense is configured for it.

> **Attention:** See "Configure Preset Revision Explanation Feature" in the *Deltek Time & Expense 10.0 Post-Installation Configuration Guide* for more details.

Login

Why doesn't anything happen when I click the Login button?

This is most likely the result of having the wrong URL entered in the app. Check the URL entered in the application; it should end with /DeltekTouch/Costpoint/TE/. For the complete URL, check with your system administrator.

How do I get to auto-populate the Costpoint Mobile T&E URL when I log into the application?

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

> **Attention:** See "Step 12: Create the Email Link to Send to Users" in the *Costpoint Mobile Time and Expense Technical Installation and Configuration Guide* for more details.

When I log into the application using a Blackberry Key2 LE device and enter values in the System field, the entries sometimes get duplicated.

This issue is device-related. As a workaround, change your device keyboard to SwiftKey software keyboard.

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.

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