Deltek

Deltek Costpoint®
Mobile Time and Expense
1.0

Release Notes

March 05, 2020

Contents

Overview

Welcome to Deltek Costpoint Mobile Time and Expense 1.0 Release Notes. These release notes contain a summary of the following:

- Major New Features and Enhancements
- Software Issues Resolved
- Known Issues

> **Note:** The official name of the application is *Deltek 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*.

Pre-Installation Information

Before you begin the installation and setup of Costpoint Mobile T&E, it is important to understand the following information:

- You must install Costpoint Time & Expense 10.x and Costpoint Maintenance Release 7.1.3, at the minimum.

- If you are going to access Costpoint Mobile T&E from the Internet, open a port in your firewall to access the Costpoint Time & Expense virtual directory, which will be installed on the IIS server. Costpoint Mobile T&E requires the use of TLS 1.2 protocol in production deployments and all installations when using mobile devices.

- You must install Costpoint Mobile T&E on an IIS Web server. You can use an existing IIS Web server, or your Costpoint Web server, but not on the embedded WebLogic Web server.

- Costpoint Mobile T&E supports applications from the *Apple App Store* and *Google Play Store*.

> **Note:** The Costpoint Mobile T&E URL has the format
> **https://<server>/DeltekTouch/Costpoint/TE**, where **<server>** refers to the host name of your Costpoint Mobile T&E server.

Technical Considerations

The following requirements must be met to run Costpoint Mobile T&E:

- You must install Costpoint Mobile T&E on an IIS server that is installed on Windows Server 2012, Windows Server 2012 R2, or Windows Server 2016.

- When using Secure Sockets Layer (SSL), you must have a certificate issued by a trusted certificate authority. You must not use self-signed certificates. Wild card certificates are acceptable if they come from a trusted certificate authority.

- Costpoint Mobile T&E supports applications from the *Apple App Store* and *Google Play Store*.

> **Note:** The Costpoint Mobile T&E URL has the format
> **https://<server>/DeltekTouch/Costpoint/TE**, where **<server>** refers to the host name of your Costpoint Mobile T&E server.

> **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.

New Features and Enhancements

This section includes summaries of the new features and enhancements included for this release.

New Application Name

The application, previously called Deltek Touch Time & Expense for GovCon, has been renamed to Deltek Costpoint Mobile Time and Expense. This native mobile version of the standard timesheet application still supports mobile devices that run on Apple iOS and Android operating systems.

Improved User Interface

The Costpoint Mobile T&E application has an improved user interface and appearance but still maintains the functionalities that existed in the Touch Time & Expense for GovCon application. Some improvements in the user interface are as follows:

PIN Login
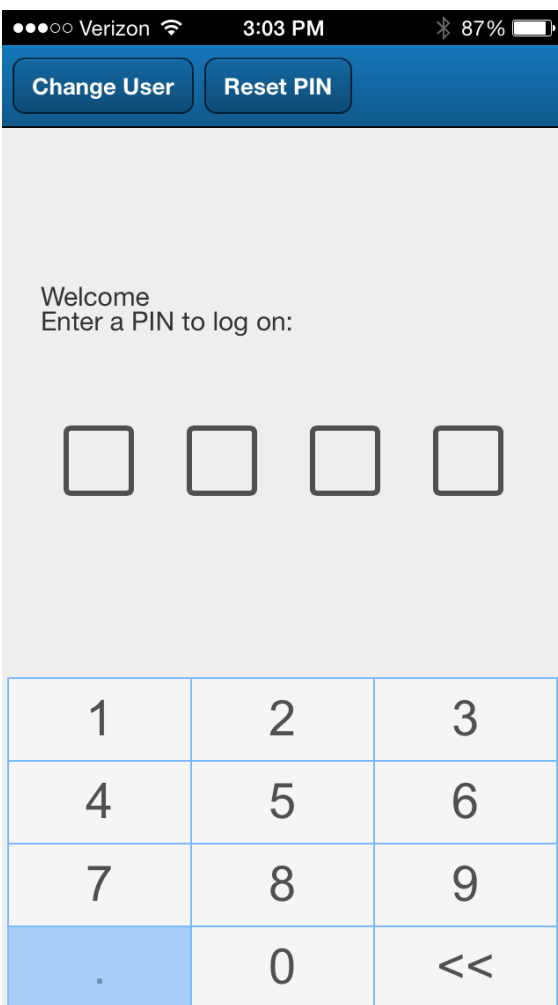
Touch Time and Expense for GovCon

Costpoint Mobile T&E

Timesheet Screen
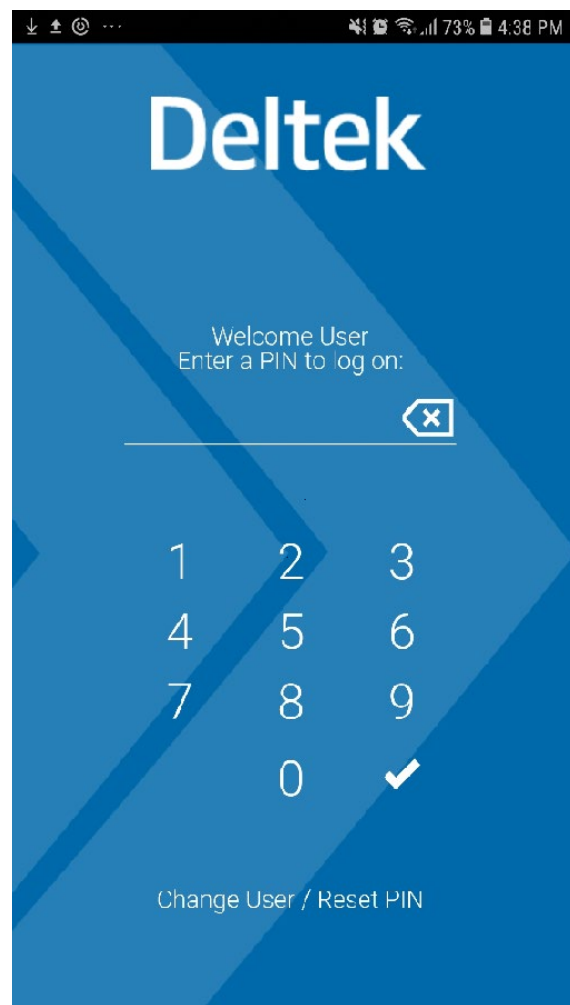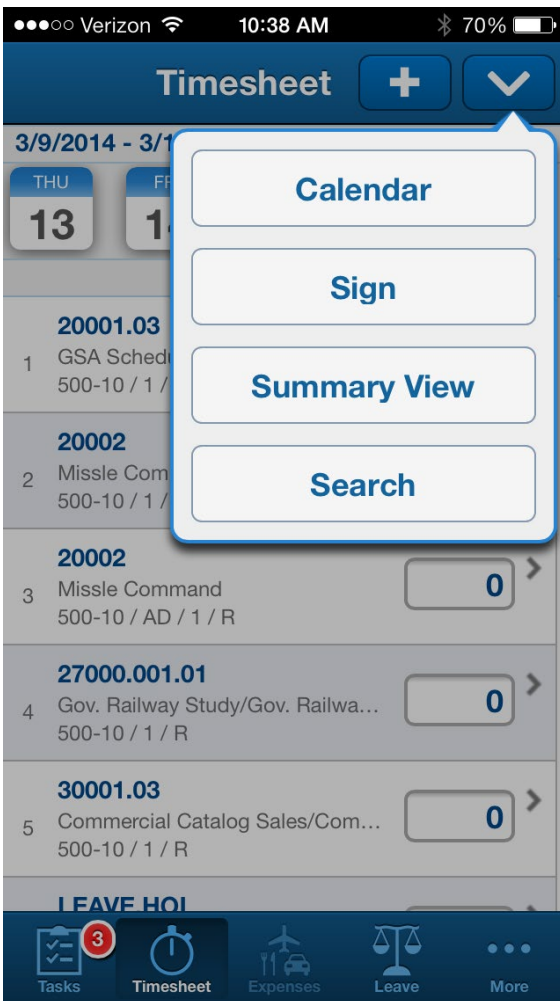

Touch Time and Expense for GovCon
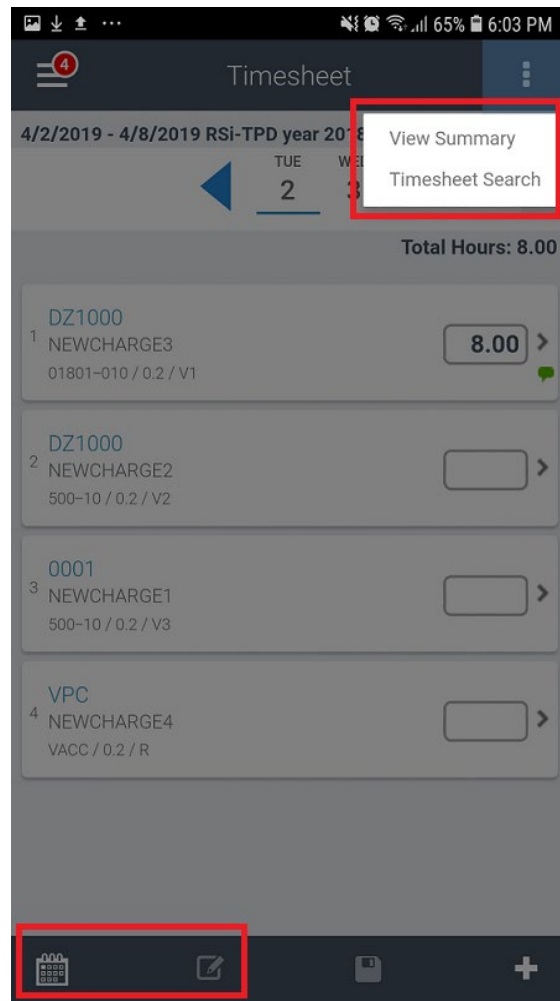
Costpoint Mobile T&E

Basic Functionalities

The Costpoint Mobile T&E application brings forward all of the current functionalities that exist in the Touch Time & Expense for GovCon application. These functionalities are briefly described in the following sections.

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

> **Note:** This version does not yet support the Work Assignment charges for the Subcontractor feature.

Navigate Timesheets

Costpoint Mobile T&E provides different ways to navigate to a different day or timesheet period.

▪ On the Timesheet screen, tap to display the calendar, where you can quickly tap a specific date to enter, update, or view the time entries for it.

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

▪ On the Calendar screen, tap **Today** to display the current date and its timesheet entries.

▪ On the Calendar screen, tap or to view periods or weeks for the previous or next month, or tap or to view periods or weeks for the previous or next year.

View Timesheet Summary and Audit Revisions

The Summary View displays 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 a timesheet using the audit information. On the Timesheet screen, tap and tap **View Summary**. Tap any of the following tabs to filter your view:
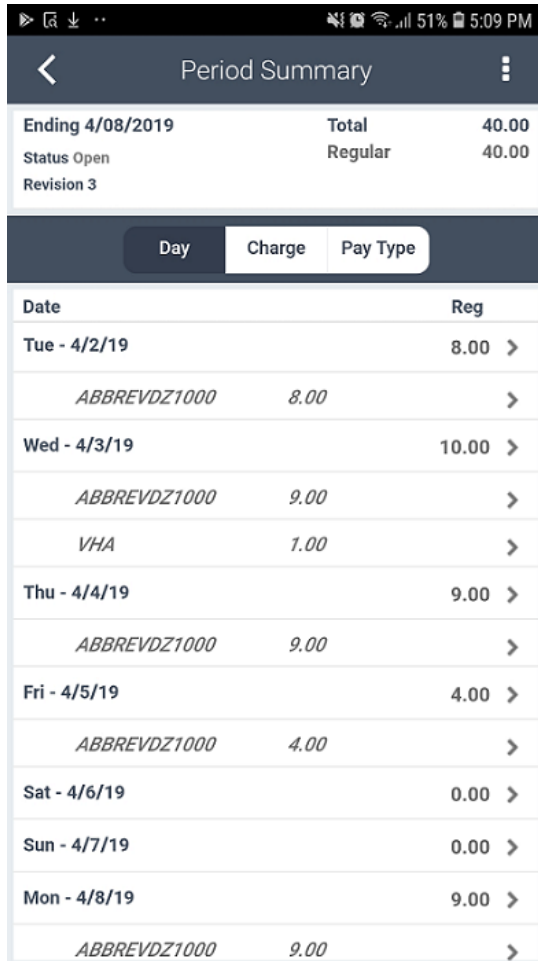
▪ **Day**: Tap this tab to display the hours you submitted for each day of the selected timesheet period, including overtime charges, if any exist. It also displays the status of the timesheet and the total hours.

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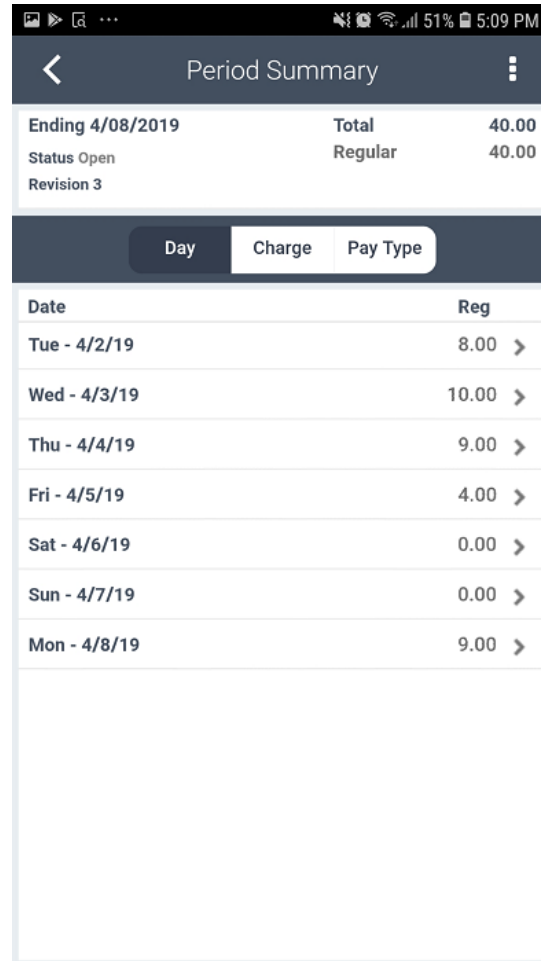
▪ **Charge**: Tap this tab to display the hours per charge that you submitted for the selected timesheet, including overtime charges, if any exist. It also displays the status of the timesheet and the total hours.

▪ **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.

Charge Details in Summary Day View

Summary Day View

While on the Summary screen, tap [icon] and tap **Audit** to display the Audit screen, which displays the revision history of a timesheet, including signature and approval details, explanation for the revisions, and any warnings received. 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 the revisions made to the timesheets, if there are any.

- **Warnings**: Tap this to display the warnings you received when you saved and/or signed the timesheet.
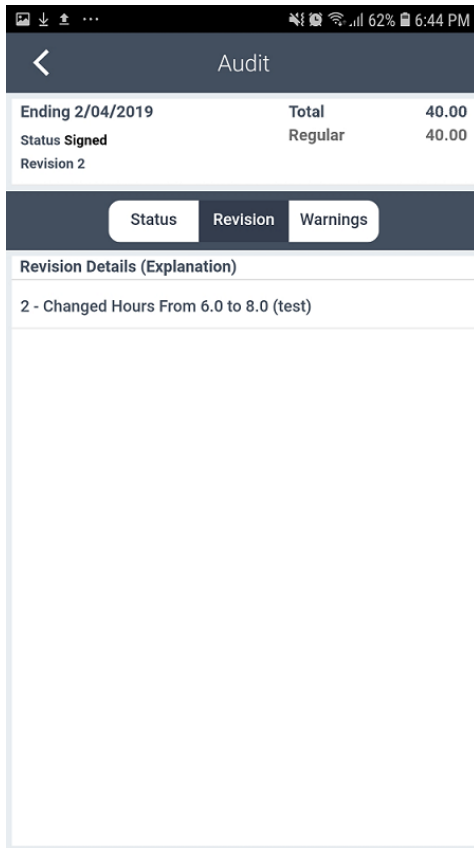
Record Time Entries

You use the Add Charge or Edit Charge screen to perform detailed timesheet entry. By default, the Add Charge or Edit Charge screen contains the following fields: **Date**, **Hours**, **Hours Comments**, and **Charge Comments**. The rest of the fields on this screen are user-defined, and their labels may change depending on your company's preference.

Add a Charge

The Add Charge screen displays when you tap on the Timesheet screen.

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

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

On the Add Charge screen, tap the appropriate fields and tap or enter the appropriate values. Tap **Done**, and the charge is added to your timesheet.

> **Note:** The fields without a forward arrow are fields defined by your company, or set by using pre-saved Favorites and are non-editable. Fields with an asterisk are required.

Edit a Charge (Detailed Entry)

The Edit Charge screen displays when you tap anywhere outside the hour field on the timesheet line that you want to edit. The Edit Charge screen displays with details of the selected charge. Tap the field that you want to update, or tap the appropriate values.

> **Note:** You will be prompted to enter a revision explanation every time you edit a previously saved timesheet line. Enter a note to explain the revision made. Alternatively, you can select from the list of preset revision explanations if your application is configured for it.

Edit a Charge (Quick Entry)

You can also edit your timesheet quickly through the time picker in the timesheet line. To display the time picker, tap the hour field of the timesheet charge that you want to edit.

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

Manage Tasks

Costpoint Mobile T&E allows you to perform various tasks, 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 is indicated in the main menu. For example, indicates that you have 4 tasks.
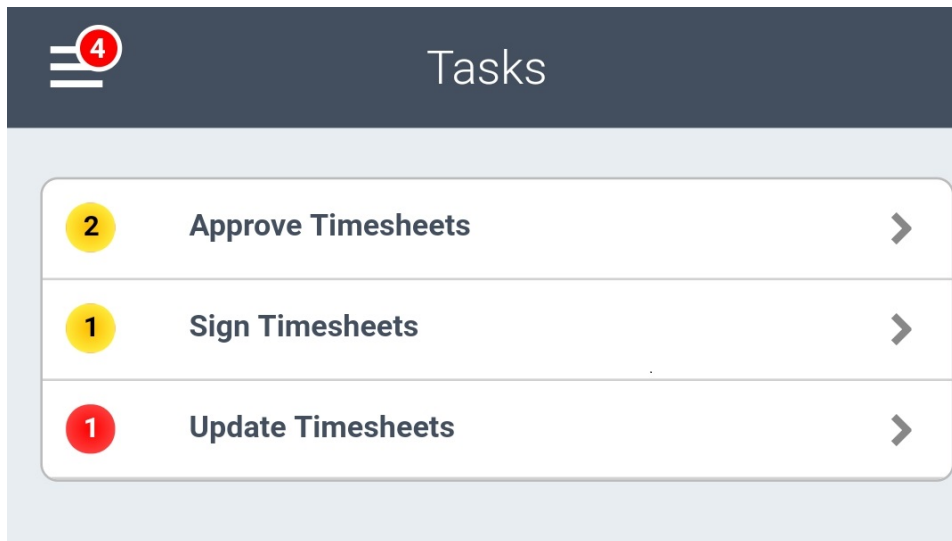
Task notifications are also color-coded based on priority level.

- **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. Tap , or tap and tap **Approve,** to approve a timesheet.	✓	
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 and submit for approval. If there is only one timesheet period to sign, tapping **Sign Timesheets** displays the timesheet. If there are multiple timesheet periods to sign, tapping **Sign Timesheets** displays the list of timesheets. Tap to sign a timesheet.	✓	✓
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 period to update, tapping **Update Timesheets** displays the timesheet. If there are multiple timesheet periods to update, tapping **Update Timesheets** displays the list of timesheets.	✓	✓

Configure User Settings

Tap and tap **Settings** to display the Settings screen, where you can view and modify different settings of Costpoint Mobile T&E on your device.
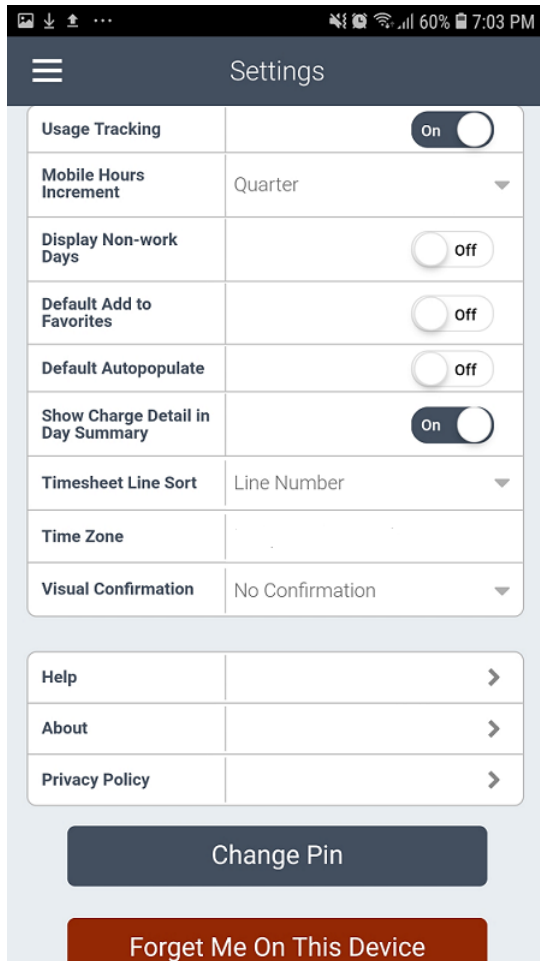
The fields on this screen are described in the following table:

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.
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	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

Field	Description
	Timesheet Class. For example, if Timesheet Class is set to:
	▪ **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	Tap **On/Off** to set the days that will be displayed on the timesheet.
	▪ Tap **On** to display non-work days.
	▪ Tap **Off** to display only work days. (Flexible days are displayed if the Work Schedule is set.)
Default Add to Favorites	Tap **On/Off** to configure the **Favorite** option on the Add Charge or Edit Charge screen.
	▪ 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	Tap **On/Off** to configure the **Autopopulate** option on the Add Charge or Edit Charge screen.
	▪ 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	Tap **On/Off** to set your view on the Day tab of the Summary screen.
	▪ 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	Tap to sort the charges on your timesheet by:
	▪ **Line Number**: This is set by default.
	▪ **Charge ID**

Field	Description
	▪ **Charge Description** Changes made to the sorting order are applied when you save the timesheet.
Time Zone	This field displays the selected time zone and is not editable.
Visual Confirmation	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: ▪ **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 message before 3 seconds. This is the default setting. ▪ **Action Confirmation**: Tapping this option requires you to tap **OK** to close the confirmation message.
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. You can also access **Help** by tapping and tapping **Help**.
About	Tap to view the device and operating system information, which includes the following: ▪ 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 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.

Field	Description
Privacy Policy	Tap to view the Legal Notices and Privacy Statement information page of Deltek.
Change PIN	Tap to create a new PIN code.
Forget Me On This Device	Tap to delete all information details from the application, including login information and settings.

Two-Factor Authentication

Costpoint Mobile T&E now supports Two-factor authentication (2FA), which 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 *Deltek Costpoint 7.1.1 Security Guide* and the Authentication Tab topic in the Costpoint Online Help.

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

> **Note:** This version does not yet support Single Sign On (SSO), which is currently scheduled for release in the first quarter of 2020.

Help Page

Tapping ▦ now displays the Costpoint Mobile Time and Expense Help page, where you can access the Costpoint Mobile T&E User Guide, videos, and learning aids.

Software Issues Resolved

There are no software issues resolved in this release.

Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

Known Issues

This section contains information about existing issues that will be resolved in a future release.

> **Attention:** The following issues are encountered in the Deltek Time & Expense application and affect the Costpoint Mobile T&E application.

Defect 1086426

Description: When you encounter problems with the timesheet you are saving, Costpoint Mobile T&E displays warnings without a blank row after each line.

Customers Impacted: This defect affects all Costpoint Mobile T&E users.

Workaround Before Fix: None.

Additional Notes: None.

Defect 1085446

Description: When you perform a search for a charge to add to your timesheet, the results display on the Lookup Charges screen do not match the criteria you specify. For example, you specify to search for project charge but the results displayed are related to account name.

Customers Impacted: This defect affects all Costpoint Mobile T&E users.

Workaround Before Fix: None.

Additional Notes: None.

Appendix A: For Additional Information

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
Deltek Costpoint Mobile Time and Expense User Guide	This document contains detailed information and instructions on how to use various features of the application.
Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide	This document provides instructions for the installation and configuration of the application.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com

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