




**Deltek**

# Deltek Costpoint® Mobile Time and Expense in the Cloud

## 2.2

Administrator Guide

**March 30, 2023**



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## Overview

Costpoint Mobile Time and Expense by Deltek, the native mobile version of the standard timesheet and expense applications, enables you to view, enter, update, submit, and approve timesheet data and expense reports, depending on your role, from anywhere at any time using your touch screen device, and synchronizes that data to the Costpoint Time and Expense database.

This product is for iOS and Android devices and does not support Blackberry devices.

**Note:** The official name of the application is Costpoint Mobile Time and Expense. This document uses it only at the first mention. 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 provides instructions for the configuration of Costpoint Mobile T&E.

## Features Not Supported

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

- **Interim Charges:** You cannot create interim charges in Costpoint Mobile T&E. However, you can charge interim charges already in the timesheets. Interim charge edit occurs 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.
- **Line-Level Approval:** You can perform line-level approvals only in a browser-based timesheet screen.
- **Timesheet Printing:** You will not be able to print timesheets. You will need to use browser-based timesheets.
- **Timesheet Comments:** You will not be able to enter or view the OVERALL timesheet comments and notes.
- **Unhide Outstanding Expenses:** You can only hide outstanding expenses displayed on the Outstanding Expenses tab. To display a hidden outstanding expense again in Costpoint Mobile T&E, you need to log into Costpoint, navigate to **Time & Expense » Expense » Expense Reports » My Outstanding Expenses**, and clear the **Hide** checkbox for that outstanding expense.
- **Multi-Day Per Diem Ceiling Meal Expenses:** You will not be able to enter or edit multi-day per diem ceiling meal expenses in Costpoint Mobile T&E. You can enter or edit these expenses only via browser.

## Mobile Devices Requirements

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

- Apple iOS 14 and higher
- Android 10 and higher

In addition, you must have the following default browsers:

- Safari for Apple iOS devices
- Google Chrome for Android devices

**Note:** For Samsung devices, you must have the default Samsung Internet browser.

## User Authentication

Costpoint Mobile T&E does not introduce users and passwords, or define its own models. Instead, it uses existing product user provisioning and authentication.

### SAML Single Sign-On (SAML SSO) Mode

You can configure Costpoint to act as a Security Assertion Markup Language (SAML) Service Provider to allow you to log into Costpoint Mobile in the SAML Single Sign-On (SAML SSO) mode. In this scenario, you do not provide credentials such as a password on the login page. Instead, a SAML compliant server acts as a SAML Identity Provider responsible for verifying your identity.

SAML SSO mode authentication is supported for the following third-party authentication servers:

- Microsoft Active Directory Federation Services (ADFS)
- Microsoft Azure
- Okta
- Ping

**Note:** If you are set up for SAML SSO authentication in Costpoint, you can use that username and password for Costpoint Mobile T&E with the same SAML SSO authentication once the mobile application entity is set up.

**Note:** The device must be encrypted and must have a passcode or screen lock set up to allow the Costpoint Mobile T&E application to bypass the PIN/Biometric Login screen.

**Important:** Costpoint Mobile T&E does not currently support multiple SAML Service Providers within a single system.

Consider the following guidelines when configuring third-party authentication servers.

- On the specific third-party authentication server's Admin Portal or Console, register and configure Costpoint Mobile T&E.

**Note:**

- If you already have one Azure setup for Costpoint and you would like to add another one for Costpoint Mobile T&E, you must use a different entity ID URL for Costpoint Mobile T&E.
- The Entity ID is a unique identifier for a SAML entity. The Entity ID for Costpoint Mobile T&E must be unique (no other application is set up with the same name ) and should be a URL that starts with **https://**, for example: <https://CostpointTEMobile>
- The Reply URL is the location to which Azure AD will send the authentication response. The Reply URL format is: **Your organization's Costpoint Mobile T&E URL+ /cpshared/backend/samltokenreturn.php**

For example:

If the Costpoint Mobile T&E URL is <https://johnsmithcorp.com/costpoint/te>

The Reply URL is

<https://johnsmithcorp.com/costpoint/te/cpshared/backend/samltokenreturn.php>

- The **enterprise.properties** file should contain an entry for the LDAP servers with both the authentication providers listed, starting with the Costpoint authentication provider followed by the Costpoint Mobile authentication provider.

For example:

For the system T10QCM14CLSYS7, AZUREWEBSAML1 is the authentication provider for Costpoint while AZUREMOBILESAML1 is the authentication provider for Costpoint Mobile.

In the **enterprise.properties** file, you will have the following entry:

**T10QCM14CLSYS7.Idap.IdapServers=AZUREWEBSAML1,AZUREMOBILESAML1**

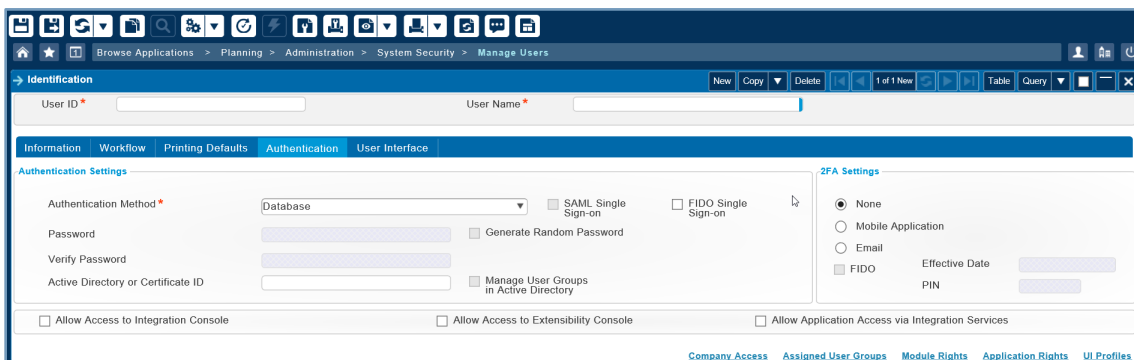
The overall configuration process is very specific for each SAML Identity Provider. However, there are a few key things to keep in mind when configuring other SAML Provider. These are discussed in the [Deltek Costpoint Security Guide](#).

- For ADFS, see the "Configure SAML Single Sign-on between Costpoint and Microsoft AD FS" section.
- For Microsoft Azure, see the "Configure SAML Single Sign-on between Costpoint and Microsoft Azure" section.
- For other SAML providers (Okta and Ping), see the "Configure SAML Single Sign-on between Costpoint and Other SAML Identity Providers" section.
- Download the federation metadata XML file. For Azure and ADFS, you may copy the XML file into the Costpoint Mobile T&E configuration file. For Ping and Okta, you may put the XML file in a common location and import.
- For Azure and ADFS, you may reuse the federation metadata XML that you generated for the Costpoint Web application if you are using the same system. However, make sure to correct the Costpoint Assertion Consumer Service (ACS) URLs to point to the specific SAML endpoint references for the Costpoint Mobile T&E application before uploading the federation metadata XML file into ADFS or Azure.

For example:



- If you are setting up new users to use SAML SSO authentication, use the **Planning » Administration » System Security » Manage User** screen in Costpoint.



If a user is already set up for SAML SSO authentication in Costpoint, you will need to assign the mobile authentication provider to the user or user group on the third-party authentication server.

**Note:** See “Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication” in the *Costpoint Mobile Time and Expense User Guide* for more information.

## Biometric Authentication

You can log into 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, see the “Settings Screen” section of the *Costpoint Mobile Time and Expense 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 installer will automatically update this setting.

**Note:** For more information on how to enable the biometric authentication setting, see “Update the Biometric Authentication Setting” in this guide.

- You are using a device that supports biometric authentication:



- Fingerprint on Android devices
- Touch ID on all supported Apple devices
- Face ID on all supported Apple devices

**Known Issues on Android Devices:** There are biometric authentication issues on specific Android devices, such as Samsung Galaxy Note, Samsung Galaxy A10, Samsung Galaxy S8, and Xiaomi Redmi Note 7.

- If both Face ID and Fingerprint ID are registered for biometric authentication, only the Fingerprint ID option displays on the Biometric Login screen after you enter your login credentials on the Costpoint Mobile T&E Login screen.
- If only Face ID is registered for biometric authentication, only the PIN screen displays after you enter your login credentials on the Costpoint Mobile T&E Login screen and not the PIN/Biometric screen.

These are issues with Google Android and not with the Costpoint Mobile Time and Expense application.

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

**Note:** For more information on biometric authentication behavior on different devices, see the “Biometric Authentication” section of the *Costpoint Mobile Time and Expense User Guide*.

- If you are using Two-Factor Authentication (2FA) with Microsoft Authenticator and Face ID on iOS devices, you may be stuck when trying to approve an authentication from Microsoft Azure.

This is a known issue with the Microsoft Authenticator application, and the workaround is to use PIN instead of Face ID with the application.

## Set Up Costpoint Mobile Time and Expense

Use the following checklist as a guide for setting up Costpoint Mobile T&E Collection.

Step	Procedure	✓
1	Allow access to the Costpoint Mobile T&E application.	
2	Verify application rights assigned to user roles.	
3	Configure charge lookup options.	
4	Enable or disable ICR processing in capturing expense.	
5	Enable or disable sending of information to Google Analytics.	
6	Set up the "MANUAL" batch expense type.	
7	Set up a task at the expense level both for the expense report type and expense type.	
8	Set up the Timesheet and Expense Classes for a subcontractor.	
9	Provide modules access to a subcontractor using the Resource screen	
10	Make timesheets available offline.	
11	Configure UDTs to allow manual entry.	
12	Configure your Timesheet Class to use the Time Clocking features.	
13	Create the email link to send to users.	

### Step 1: Allow Access to the Costpoint Mobile T&E Application

You must enable access to the Mobile Time application or the Mobile Expense application in order to access and use the Costpoint Mobile T&E application.

#### To allow users to access Costpoint Mobile T&E:

1. On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings**, and then click the Miscellaneous tab.
2. In **Mobile Options**, select **Allow Mobile Access**, and select one or both options:
  - To allow access to the Time application, select the **Allow Mobile Time Application** option.
  - To allow access to the Expense application, select the **Allow Mobile Expense Application** option.

### Note:

- Selecting **Allow Mobile Time Application** displays **Time** in the Costpoint Mobile T&E application.
- Selecting **Allow Mobile Expense Application** displays **Expense Reports** and **Capture Receipt** in the Costpoint Mobile T&E application.
- If you have access only to the Mobile Time application or to the Mobile Time and Mobile Expense applications, Costpoint Mobile T&E displays the Timesheet screen upon login.
- If you have access only to the Mobile Expense application, Costpoint Mobile T&E displays the Expense Reports screen upon login.

**Note:** You can also provide access to the Costpoint Mobile T&E application at the Timesheet Class or Expense Class level through the **Allow Mobile Access** option on the Timesheet Classes or the Expense Classes screen. This option, which is enabled and selected by default, overrides the options on the General Settings screens, allowing you to provide or deny specific Timesheet/Expense Class users access to the Costpoint Mobile T&E application.

For more information on this option, see the "Timesheet Classes » Basic Information Tab" topic and the "Expense Classes » Basic Information Tab" topic in the *Deltek Time & Expense Help System*.

**Note:** If both options are cleared and you logged into the Costpoint Mobile T&E application, you will remain on the PIN and Biometric Login screen of the Costpoint Mobile T&E application with the following message:

"Your organization does not allow access to the Costpoint Mobile Time or Costpoint Mobile Expense. Contact your administrator for further information."

The screenshot shows the 'General Settings' window for 'Time & Expense'. The 'Miscellaneous' tab is selected. In the 'Native Mobile Options' section, the following settings are visible:

- ☒ Allow Mobile Access
- ☐ Allow users to send information to Google Analytics
- ☒ Allow Mobile Time Application
- ☒ Allow Mobile Expense Application
- ☒ Allow Offline Access

In the 'Mobile Privacy Option' section, the following setting is visible:

- ☐ Allow ICR Expense Processing

A red box highlights the 'Allow Mobile Time Application' and 'Allow Mobile Expense Application' options.

## Step 2: Verify Application Rights Assigned to User Roles

Since Costpoint Mobile T&E utilizes the web services of Costpoint applications, you may need to verify that users have appropriate rights. These four required applications are:

Application	Name	Application Rights	Note
ADMDESKTOP	Manage MyDesktop	Full	
TMMTIMESHEET	Timesheet	Full	This application is required for entering timesheets.
EPMEXPRT	Expense Report	Full	This application is required only if you are using expense reports.
EPMEXPENDING	My Outstanding Expenses	Full	This application is required only if you are using expense reports.

Any Costpoint Mobile T&E user will need appropriate rights for the applications mentioned above. Since Costpoint Time & Expense security is based on Costpoint user groups, you can perform one of the following options.

- **Option 1:** Verify that each specific Time & Expense user group has rights.
- **Option 2:** Grant application rights in the Costpoint EVERYONE user group.

### Option 1: Verify that Each Specific Time & Expense User Group Has Rights

For this option, you need to verify that the required applications are granted to the appropriate Time & Expense user groups. The user groups that you need to verify are based on how your security roles are set up in Time & Expense.

For every security role, you can determine the user groups that you need to review on the Manage Security Roles screen, as shown below:

## Set Up Costpoint Mobile Time and Expense

**Security Roles**

Role Code *	Description *	Apply Employee Level Security	Apply Charge Level Security	Modify Employee Role	Modify Time
ADMIN	Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DEFAULT	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EMPL	Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EXPADMIN	Expense Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SPVSR	Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SYSADMIN	System Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Sync User Groups

**Security Roles > User Groups**

User Group ID *	User Group Name *	Time or Expense *
STD_EXPENSE_RESOURCE	Expense Resource	Expense
STD_TIME_RESOURCE	Time Resource	Time

Close

**Note:** On the Costpoint menu, click **Time & Expense » Configuration » Resources » Manage Security Roles** to display the screen.

On this screen, the **Employee** security role is mapped to two Costpoint user groups, **STD\_EXPENSE\_RESOURCE** and **STD\_TIME\_RESOURCE**. Thus, you need to verify these groups on the Manage User Groups screen.

**Manage User Groups**

User Group ID *	Name *	Active Directory ID (sAMAccountName)
STD_EXPENSE_ADMIN	Expense Administrator	
STD_EXPENSE_MANAGER	Expense Manager	
STD_EXPENSE_RESOURCE	Expense Resource	
STD_TIME_ADMIN	Time Administrator	
STD_TIME_MANAGER	Time Manager	
STD_TIME_RESOURCE	Time Resource	

Assign Users to Group Module Rights Application Rights Active Directory Groups User Profiles

**Application List**

Application	Name	Domain
ADMCHOTREE	Maintain Charge Tree	Time & Expense
ADMDESKTOP	Manage MyDesktop	Time & Expense
ADMEMAILTEXT	Manage E-mail Text	Time & Expense
ADMEMPLORP	Manage Resource Groups	Time & Expense
ADMEMPLINFO	Manage Resource Information	Time & Expense
ADMEMPLPREF	Manage Preferences	Time & Expense
ADMFUNCTIONALROLE	Manage Functional Roles	Time & Expense

**Application Rights**

Application *	Name	Application Rights *	Company ID *
ADMDESKTOP	Manage MyDesktop	Full	ALL
TMMEMPLWORKSCH	Manage Work Schedule	Full	ALL
TMMTIMESHEET	Manage Timesheets	Full	ALL

Result Set Rights by Application

Close

**Note:** On the Costpoint menu, click **Admin » Security » System Security » Manage User Groups** to display the screen.

In this example, **STD\_TIME\_RESOURCE** already gives FULL rights to the ADMDESKTOP application, but no rights are assigned to the SYMABOUT application. Thus, you need to grant rights for the SYMABOUT application.

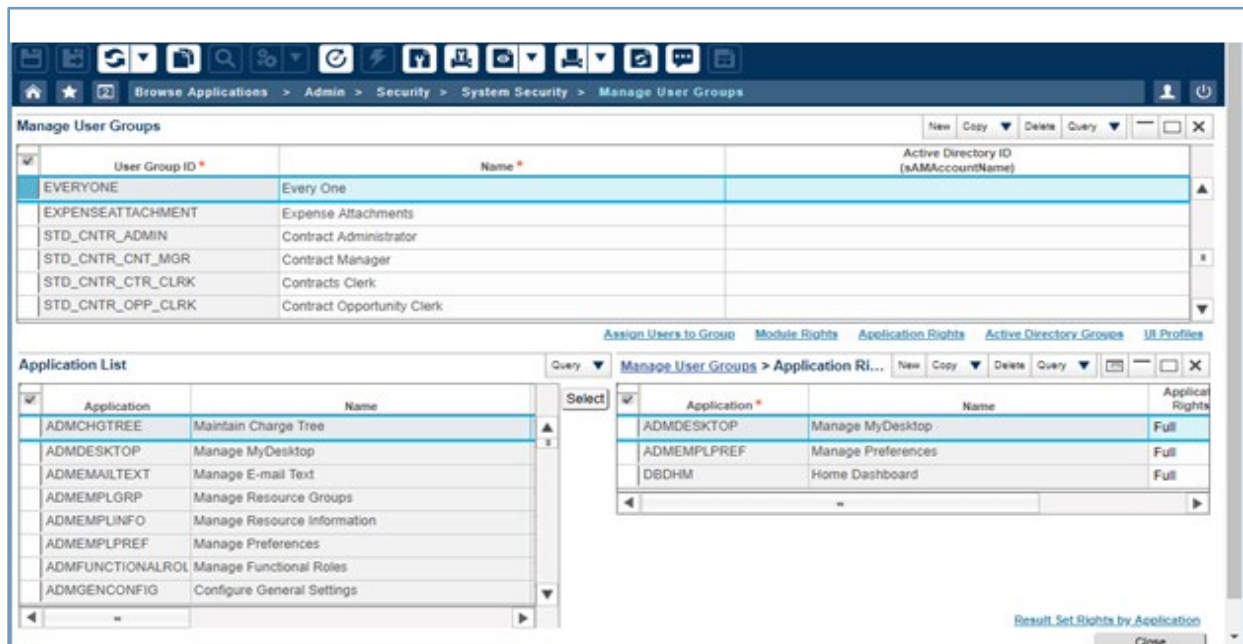
**Note:** You need to verify all Costpoint User Groups that are mapped to Time and Expense security roles. In this example, you also need to verify **STD\_TIME\_RESOURCE**.

## Option 2: Grant Application Rights in the Costpoint EVERYONE User Group

For this option, you need to add rights to the **EVERYONE** user group if you have no concern granting the required applications to all users.

You need to verify **EVERYONE** on the Manage User Groups screen.

**Note:** On the Costpoint menu, click **Admin» Security » System Security » Manage User Groups** to display the screen.



In this example, **EVERYONE** already gives FULL rights to the ADMDESKTOP application, but no rights are assigned to the SYMABOUT application. Thus, you need to grant rights for the SYMABOUT application.

## Step 3: Configure Charge Lookup Options

Configure the lookup charges options that will be available to employees on the Lookup screen of Costpoint Mobile T&E.

**To set the default options:**

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » Manage Timesheet Classes**.
2. On the Basic Information tab, use the Search feature to select the **Timesheet Class** that you want to configure for Costpoint Mobile T&E.

3. In **Mobile Lookup Options**, select the checkbox next to each lookup option you want to enable:
  - **Show Project**
  - **Show Manufacturing Orders:** This option is available only to Costpoint users.
  - **Show Account**

The screenshot shows the 'Timesheet Classes' configuration window. The 'Mobile Lookup Options' section is highlighted with a red box. It contains the following options:

- ☒ Allow Mobile Access
- ☐ Show Project
- ☐ Show Manufacturing Orders
- ☐ Show Account

Other visible sections include:

- Entry Options:** Entry Mode (dropdown), Require Confirmation (checkbox), Entry Validation (dropdown), Rounding (dropdown), Hours Increment (dropdown).
- Overtime Options:** Overtime Handling (dropdown), Overtime Distribution (dropdown), Pay Type Rules Source (dropdown), Custom Overtime Dialog (checkbox).
- Miscellaneous:** Revision Explanation (dropdown), Create Interim Charges (checkbox), Interim Validation (dropdown), Reverse Timesheet on Correction (checkbox).
- Schedule Rights:** Must Request Leave (checkbox), Allow Edit of Day Properties (checkbox), Allow Edit of Standard Hours (checkbox), Allow Edit of Lunch Hours/Times (checkbox), Allow Edit of Work/Non-Work Hours (checkbox).
- User Defined Rates:** Table with columns Rate, View, and Modify.

4. Click **Save**.

## Step 4: Enable or Disable ICR Processing in Capturing Expense

Costpoint Mobile T&E is integrated with an intelligent character recognition (ICR) technology when you use Capture Receipt. With this feature, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the Expense Report screens, and populates the matched fields.

**To enable or disable ICR processing in capturing expense:**

1. On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings**, and then click the Miscellaneous tab.
2. In **Mobile Privacy Option**, select whether to enable or disable ICR processing in capturing expenses.
  - To enable ICR processing, select the **Allow ICR Expense Processing** option. The **Use ICR for Expenses** field, which defaults to **On**, displays on the Settings screen in the Costpoint Mobile T&E application.
  - To disable ICR processing, clear the **Allow ICR Expense Processing** option. The **Use ICR for Expenses** field on the Settings screen in the Costpoint Mobile T&E application is hidden.



## Set Up Costpoint Mobile Time and Expense

The screenshot displays the 'General Settings' configuration page for 'Time & Expense'. The 'Miscellaneous' tab is selected. Key sections include:

- Miscellaneous:** Checkboxes for 'Costpoint Multicompany', 'Restrict Delegation', and 'Use Group Cache for Charge Lookup'. A dropdown for 'Charge Lookup Method' is set to 'Advanced'.
- Import/Export Alternate File Locations:** Fields for 'Import Location' (set to 'IMPORT'), 'Import Trash Location' (set to 'ACA\_TRASH'), 'Export Location', and 'ACA\_EXPORT'.
- Email:** Fields for 'System Email Address', 'Time Sender Email Address', and 'Expense Sender Email Address'.
- Custom Stored Procedure Names:** A list of procedure names with corresponding input fields, including 'Timesheet Pre Save', 'Timesheet Post Save', 'Timesheet Pre Sign', 'Timesheet Post Sign', 'Timesheet Pre Approve', 'Timesheet Post Approve', 'ER Pre Sign', 'ER Post Sign', 'ER Pre Save', 'ER Post Save', 'EA Pre Save', 'EA Post Save', 'EA Pre Sign', and 'EA Post Sign'. A checkbox 'Put all in TEMP' is also present.
- Mobile Options:** Checkboxes for 'Allow Mobile Access', 'Allow Mobile Time Application', 'Allow Mobile Expense Application', and 'Enable New Mobile Responsive Design Interface'.
- Mobile Privacy Option:** A checkbox 'Allow users to send information to Google Analytics' is unchecked, while 'Allow ICR Expense Processing' is checked and highlighted with a red box.

## Step 5: Enable or Disable Sending of Information to Google Analytics

Google Analytics is a tool that Deltek uses to anonymously gather mobile application usage, such as user interface clicks and selections and application crashes. Users opt in for usage tracking when they install and launch the Costpoint Mobile Time & Expense application.

While usage tracking is completely anonymous, Deltek understands that some companies do not want to allow their users to opt in to this usage tracking tool. With this, Deltek adds an option that you can configure to not allow users to opt in.

**Note:** Beginning with Apple iOS 14.5 and higher, the **Usage Tracking** field on the Settings screen is turned off/hidden to comply with Apple's Application Tracking Transparency policy.

### To enable or disable sending of information to Google Analytics:

- On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings**, and then click the **Miscellaneous** tab.
- In **Mobile Privacy Option**, select whether to enable or disable sending of information to Google Analytics.
  - To enable sending, select the **Allow users to send information to Google Analytics** option. The **Usage Tracking** field, which defaults to **On**, displays on the Settings screen in the Costpoint Mobile T&E application.
  - To disable sending, clear the **Allow users to send information to Google Analytics** option. The **Usage Tracking** field on the Settings screen in the Costpoint Mobile T&E application is hidden.



The screenshot shows the 'General Settings' page for 'Time & Expense'. The 'Miscellaneous' tab is selected. In the 'Mobile Privacy Option' section, the checkbox 'Allow users to send information to Google Analytics' is checked and highlighted with a red box. Other sections include 'General Options', 'UDT Options', 'Import/Export Alternate File Locations', 'Email', 'Custom Stored Procedure Names', and 'Mobile Options'.

## Step 6: Set Up the “MANUAL” Batch Expense Type

This step applies only if you have not yet set up a batch expense type called **MANUAL**.

Use this procedure if you have access to the Mobile Expense application and are planning to utilize the Capture Receipt feature. You need to have a batch expense type called **MANUAL** and the **Batch Type Source** to **Manual** in order to manually add expenses either from a credit card or from another source using the Costpoint Mobile T&E application,.

To set up the “MANUAL” Batch Expense Type:

1. On the Costpoint menu, click **Time & Expense » Expense » Batch Expenses » Expense Batch Types**, and then click the Basic Information tab.
2. In **General**, specify the following fields:
  - **Batch Type Code:** Enter **MANUAL**.
  - **Description:** Enter up to 30 characters for the batch type description.
  - **Source:** Set this field to **Manual Entry**.
  - **Days Due:** Enter the number of days in which the expenses that use this batch type will be due.
  - **Payment Method:** Select the payment method that is used by this batch type. The valid values are all payment methods that have been set up in the system with the exception of the Advance payment method.
  - **Bill Currency:** Select the bill currency that should be used to process this expense batch type.

The screenshot shows the 'Expense Batch Types' page. The 'Batch Type Code' is 'MANUAL'. The 'Basic Information' tab is selected, showing the 'General' section. The 'Source' is set to 'Manual Entry', 'Days Due' is 0, 'Payment Method' is 'Cash', and 'Bill Currency' is 'US Dollar (USD)'. The 'Defaults' section shows 'Transaction Currency' as 'US Dollar (USD)', 'Employee' as an empty field, 'Provider' as an empty field, and 'Wizard Type' as '-None-'.

## Step 7: Set up a Task at the Expense Level Both for the Expense Report Type and Expense Type

Make sure that a task (for example, approval, review, or attachment task) at the expense level is set up both for the expense report type and expense type. For more information, refer to the following topics in the *Deltek Time & Expense Help System*:

- Manage Expense Types
- Tasks Subtask
- Manage Expense Report Types
- Expense Report Tasks Subtask

## Step 8: Set Up the Timesheet and Expense Classes for a Subcontractor

This step applies only if you are providing access to a subcontractor.

**Note:** The Subcontractor Time and Expense Entry feature is available to users of Costpoint 8.1 and higher. See “Mobile Time Access for Subcontractors” and “Mobile Expense Access for Subcontractors” in the *Costpoint Mobile Time and Expense User Guide* for more details.

Before you perform this step, make sure that you have enabled the subcontractor's access to the Mobile Time application or the Mobile Expense application in order to access and use the Costpoint Mobile T&E application.

**Attention:** See “[Allow Access to the Costpoint Mobile T&E Application](#)” in this guide.

Use these procedures to indicate that the Timesheet Class or the Expense Class is for subcontractors.

**To indicate that the Timesheet Class is for subcontractors:**

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » Timesheet Classes**, and then click the Basic Information tab.
2. In **Export Options**, select **Subcontractor**.

The screenshot shows the 'Timesheet Classes' application window. The 'Basic Information' tab is selected. The 'Export Options' section is expanded, and the 'Subcontractor' checkbox is checked and highlighted with a red box. Other sections include 'Entry Options', 'Overtime Options', 'Miscellaneous', 'Mobile Lookup Options', 'Schedule Rights', and 'User Defined Rates'.

**Attention:** For more information on the Basic Information screen, see the "Timesheet Classes » Basic Information Tab" topic in the *Deltak Time & Expense Help System*.

To indicate that the Expense Class is for subcontractors:

1. On the Costpoint menu, click **Time & Expense » Expense » Expense Controls » Expense Classes**, and then click the Basic Information tab.
2. In **Subcontractor Options**, select **Subcontractor**.

The screenshot shows the 'Expense Classes' screen with the 'Basic Information' tab selected. The 'Subcontractor Options' section is highlighted with a red box, indicating that the 'Subcontractor' checkbox is checked. Other sections visible include 'Modify Options', 'Void Options', 'Mobile Lookup Options', 'Correction Options', 'Advance Options', and 'Miscellaneous Options'.

**Attention:** For more information on the Basic Information screen, see the "Expense Classes » Basic Information Tab" topic in the *Deltak Time & Expense Help System*.

## Step 9: Provide Modules Access to a Subcontractor Using the Resource Screen

This step applies only if you are providing access to a subcontractor.

**Note:** The Subcontractor Time and Expense Entry feature is available to users of Costpoint 8.1 and higher. See "Mobile Time Access for Subcontractors" and "Mobile Expense Access for Subcontractors" in the *Costpoint Mobile Time and Expense User Guide* for more details.

Before you perform this step, make sure that you have enabled the subcontractor's access to the Mobile Time application or the Mobile Expense application in order to access and use the Costpoint Mobile T&E application.

**Attention:** See "[Allow Access to the Costpoint Mobile T&E Application](#)" in this guide.

Use this procedure to designate a resource as a subcontractor and select the modules access you want a subcontractor to have.

To provide application access to a subcontractor:

1. On the Costpoint menu, click **Time & Expense » Configuration » Resources » Resource Information**.
2. In the Identification pane, enter basic subcontractor information and set **Resource Type** to **Subcontractor**.

- On the Access subtask screen, set the Access column of the **Time** and **Expense** modules to **Seat**.

The screenshot shows the 'Resource Information' screen with the 'Access' subtask selected. The 'Resource Type' is set to 'Subcontractor'. The 'Access' tab is selected, showing a table with 'Time' and 'Expense' modules, both set to 'Seat' access.

Module *	Deactivate Date	Access *
Time		Seat
Expense		Seat

**Attention:** For more information on the Resource Information screen, see the "Resource Information" topic in the *Deltak Time & Expense Help System*.

## Step 10: Make Timesheets Available Offline

**Note:** The Offline Time Entry feature is available to users of Costpoint 8.1 and higher. See "Offline Time Entry" in the *Costpoint Mobile Time and Expense User Guide* for more details.

Use this procedure to allow time recording using your mobile device while offline. Once offline access is provided, the **Make Timesheets Available Offline** item becomes available as a menu item in the Costpoint Mobile T&E application.

### To allow offline time entry:

- On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings**, and then click the Miscellaneous tab.
- In **Native Mobile Options**, select **Allow Offline Access**.

## Set Up Costpoint Mobile Time and Expense

General Settings

Locale (Country/Language) \* US/en Description United States/English Load Defaults

General Options UDT Options Miscellaneous Integration Setting

**Miscellaneous**

☒ Costpoint Multicompany  
☐ Restrict Delegation  
☒ Use Group Cache for Charge Lookup  
 Charge Lookup Method \* Advanced

**Import/Export Alternate File Locations**

Import Location ACA\_IMPORT  
 Import Trash Location ACA\_TRASH  
 Export Location ACA\_EXPORT

**Email**

System Email Address SysCTB81QCM17SUBKS1@deltek.com  
 Time Sender Email Address TSCTB81QCM17SUBKS1@deltek.com  
 Expense Sender Email Address EXPCTB81QCM17SUBKS1@deltek.com

**Custom Stored Procedure Names**

Timesheet Pre Save Timesheet Post Save Timesheet Pre Sign Timesheet Post Sign Timesheet Pre Approve Timesheet Post Approve ER Pre Sign ER Post Sign EA Pre Save EA Post Save EA Pre Sign EA Post Sign

**Native Mobile Options**

☒ Allow Mobile Access  
☐ Allow users to send information to Google Analytics  
☒ Allow Mobile Time Application  
☒ Allow Mobile Expense Application  
☒ Allow Offline Access

**Mobile Privacy Option**

☐ Allow ICR Expense Processing

\*Please be aware that enabling the downloading of any data offline may not be permitted under applicable rules and regulations. You should check with your organization's legal advisors before doing so.\*\*

## Step 11: Configure UDTs to Allow Manual Entry

If a user-defined table (UDT) field is configured for manual entry in Costpoint, the **Manual Entry** field for that UDT field displays on the Edit Charge screen in the Costpoint Mobile Time and Expense application. To allow manual entry in a UDT field, clear the **Validate** checkbox for that UDT in the UDT Options subtask.

To configure manual entry of a UDT:

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » Timesheet Classes**.
2. Click the UDT Options subtask.
3. Clear the **Validate** checkbox of the UDT that you want to enable the manual entry.

UDT Options

Entry Options

Entry Mode \* Standard  
☐ Require Confirmation  
 Entry Validation \* None  
 Rounding \* None  
 Hour's Increment \* Hundredth  
 Total Time Method \* None

Overtime Options

Overtime Handling \* Validate  
 Overtime Distribution \* None  
 Pay Type Rules Source \* None  
☒ Custom Overtime Dialog

Miscellaneous

Revision Explanation \* Disabled  
☒ Create Interim Charges  
 Interim Validation \* Warning  
☒ Reverse Timesheet on Correction  
☒ Generate Exception-Based Timesheets  
☒ Populate Scheduled Leave on Timesheet Open

Mobile Lookup Options

☒ Allow Mobile Access  
☒ Show Project  
☒ Show Manufacturing Orders  
☒ Show Account

Export Options

☒ Later Distribution  
☒ Payroll  
☐ Subcontractor  
☒ Export In-Process Timesheets

Schedule Rights

☒ Must Request Leave  
☒ Allow Edit of Day Properties  
☒ Allow Edit of Standard Hours  
☒ Allow Edit of Lunch Hours/Times  
☒ Allow Edit of Work/Non-Work Hours

User Defined Rates

Rate	View	Modify
LABEL 1 RATESLABEL 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LABEL 2 RATESLABEL 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Code	Label	Required	Default	Validate	Show	Print
UDT01	UDT01CS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UDT02	UDT02CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT03	UDT03CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT04	UDT04CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT05	UDT05CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT06	UDT06CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT07	UDT07CS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UDT08	UDT08CS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UDT09	UDT09CSUDT09CSU	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UDT10	UDT10CS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 12: Configure the Timesheet Class to Use the Time Clocking Features

**Note:** The Time Clocking feature is available to users of Costpoint 8.1 and higher. See “Time Clocking” in the *Costpoint Mobile Time and Expense User Guide* for more details.

Use this procedure to configure the Timesheet Class to use the Start-Stop Time or the Time In-Out feature.

- If the Start-Stop Time feature is configured in Costpoint, the Start-Stop Time screen becomes available in the Costpoint Mobile Time and Expense application.
- If the Time In-Out feature is configured in Costpoint, the Time In-Out screen becomes available in the Costpoint Mobile Time and Expense application.

**To configure the Timesheet Class to use any of the time clocking features:**

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » Timesheet Classes**.
2. Click the Basic Information tab.
3. In **Entry Mode**, do any of the following:
  - To configure the Start-Stop Time feature, select one of the following:
    - **Break Tracking:** Select this option to enable employees to enter start/stop times for meals and breaks.
    - **Start/Stop Summary:** Select this option to enable employees to enter start/stop times for meals, breaks, and work hours but not at the charge level.
    - **Start/Stop Detail:** Select this option to enable employees to enter start/stop times for meals, breaks, and work hours at the charge level.
  - To configure the Time In-Out feature, select one of the following:
    - **Attendance Required:** Select this option to require time in/out entries for hours entered on the timesheet.
    - **Attendance Optional:** Select this option to leave entry of time in/out as optional.

The screenshot displays the 'Timesheet Classes' configuration window. The 'Basic Information' tab is active. The 'Entry Mode' dropdown menu is open, showing the following options: Select, Standard, Attendance Required, Attendance Optional, Break Tracking, Start/Stop Detail, and Start/Stop Summary. Other visible options include 'Require Confirmation', 'Entry Validation', 'Rounding', 'Hours Increment', 'Overtime Handling', 'Overtime Distribution', 'Pay Type Rules Source', 'Custom Overtime Dialog', 'Revision Explanation', 'Create Interim Charges', 'Interim Validation', 'Reverse Timesheet on Correction', 'Mobile Lookup Options', 'Export Options', 'Schedule Rights', and 'User Defined Rates'.

**Attention:** For more information on the Basic Information Tab screen, see the "Time » Time Controls » Timesheet Classes » Basic Information Tab" topic in the *Deltek Time & Expense Help System*.

## Step 13: Create the Email Link to Send to Users

Once the Costpoint Mobile T&E app URL has been identified, you can send the URL to your users and allow them to copy and paste the URL into the Costpoint Mobile T&E application from their mobile device.

Use the following format for the URL:

**`https://<yourdomain>/DeltekTouch/Costpoint/TE/cpshared/backend/cptimeurl.php`**

**To create and send the link to users:**

1. Replace **<yourdomain>** with the company's domain information. The domain must be externally accessible to devices on the Internet.

The following part of the hyperlink, however, is fixed:

**DeltekTouch/Costpoint/TE/cpshared/backend/cptimeurl.php**

The Costpoint Mobile T&E application will use the domain URL as used by the Costpoint applications.

**Examples:**

**Costpoint URL:** <https://client.deltekenterprise.com/cpweb>

**Costpoint Mobile T&E URL:**  
<https://client.deltekenterprise.com/DeltekTouch/Costpoint/TE/cpshared/backend/cptimeurl.php>

2. Create the instructional text in the email message where you will embed the link.

### Example Email

The Costpoint Mobile Time and Expense application is now available to use for entering and signing timesheets, accessing pending tasks, approving timesheets, and viewing leave balances.

To download the application, search for Costpoint Time and Expense in Google Play Store or Apple App Store. After installing the application, tap on the below URL. It will launch the installed application and will pre-populate the Server URL field.

Example:

<https://client.deltekenterprise.com/DeltekTouch/Costpoint/TE/cpshared/backend/cptimeurl.php>

Your login credentials (username, password, and system) are the same as your login credentials for Costpoint web.



## 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 website 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 website.



## 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.

## Available Documentation for this Release

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 User Guide</i>	<p>This document contains detailed information and instructions on how to use various features of the application.</p> <p>To access the User Guide, tap , and then tap <b>Help</b> on the Costpoint Mobile Time and Expense application.</p>
<i>Deltek Costpoint Mobile Time and Expense FAQ Guide</i>	<p>This document contains some of the commonly asked questions to give you more information about the application.</p>



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## About Deltek

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