Deltek

Deltek Costpoint®
Mobile Time and Expense in the Cloud
2.0

Administrator Guide

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Contents

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 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 provides instructions for the installation and 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.
- **Correct Timesheet**: You will not be able to reverse timesheets within Costpoint Mobile T&E. If a timesheet class requires a reverse timesheet, you must perform timesheet corrections in a browser-based timesheet.
- **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.
- **Subcontractor Time Entry**: You will not be able to use Work Assignment charges during time entry if you are a subcontractor.
- **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** check box for that outstanding expense.
- **Combine Duplicate Outstanding Expenses**: You cannot view and combine duplicate outstanding expenses using Costpoint Mobile T&E. You can only perform this task on the My Outstanding Expenses screen in Costpoint.

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

- **Time In/Out**: You will not be allowed to use time entry in Costpoint Mobile T&E if this feature is enabled, which is checked during login. However, if you are licensed for expense and Mobile Expense is enabled, then you will have access to the mobile functions of the application.
- **Start/Stop Time**: You will not be allowed to use time entry in Costpoint Mobile T&E if this feature is enabled, which is checked during login. However, if you are licensed for expense and Mobile Expense is enabled, then you will have access to the mobile functions of the application.
- **Subcontractor Time Entry**: You will not be able to use Work Assignment charges during time entry if you are a subcontractor.

Mobile Devices Requirements

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

- Apple iOS 12 and higher
- Android 8 and higher

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 already have one Azure setup for Costpoint Cloud and you would like to add another one for Costpoint Mobile T&E in the Cloud, you must use a different entity ID URL for Costpoint Mobile T&E in the Cloud.
- The Entity ID is a unique identifier for a SAML entity. The Entity ID for Costpoint Mobile T&E in the Cloud must be unique (no other application is setup 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 in the Cloud 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.ldap.ldapServers=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 SAML providers.

- For ADFS, see *Deltek Costpoint Cloud Configuring ADFS*.

- For Microsoft Azure, see *Deltek Costpoint Cloud Configuring Microsoft® Azure*.
- For Ping, see *Deltek Costpoint Cloud Configuring Ping*.
- For Okta, see *Deltek Costpoint Cloud Configuring Okta*.

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, refer to the “Settings Screen” section of the *Deltek 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 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 supports 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.

  > **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).

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	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.

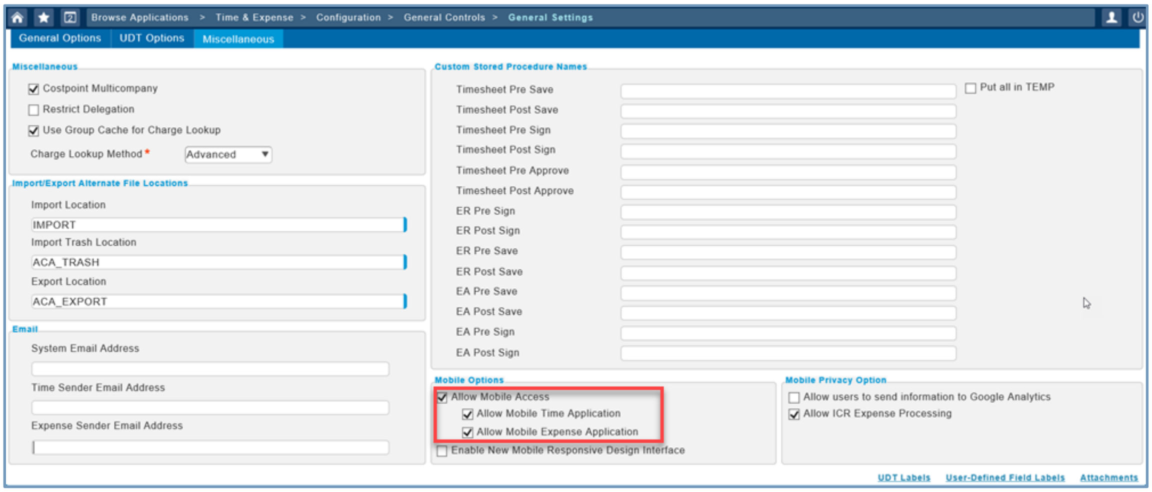
To allow users to access Costpoint Mobile T&E:

1. In 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:** 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."



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
ADMDESKTOP	Manage MyDesktop	Full
SYMABOUT	View Help About	Read-Only
EPMEXPRPT	Expense Report	Full
EPMEXPOUTSTANDING	My Outstanding Expenses	Full

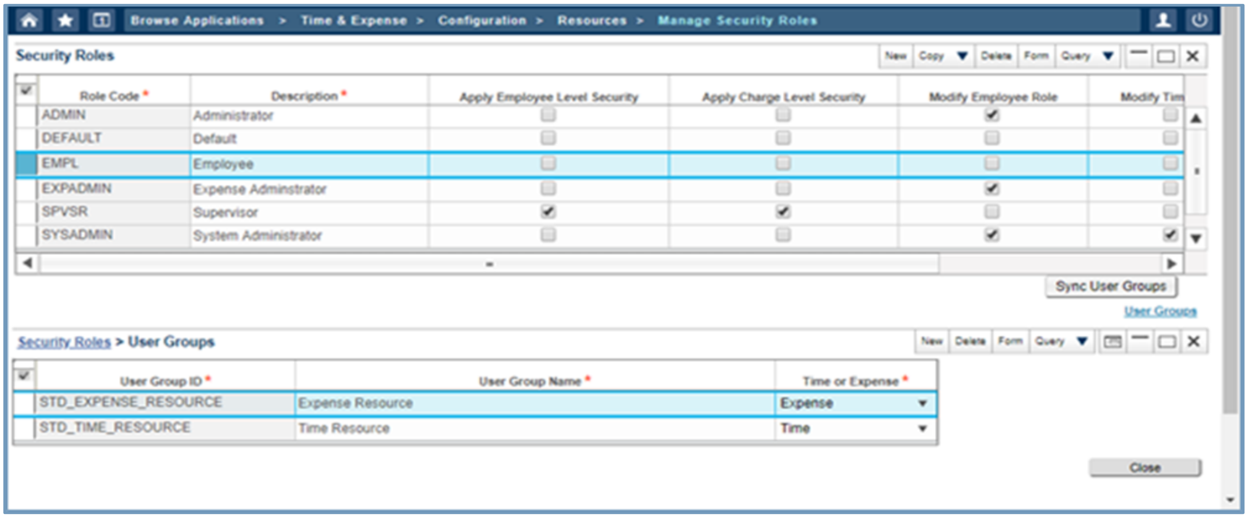
Any Costpoint Mobile T&E user will need appropriate rights for the applications mentioned above. Since Costpoint Time & Expense security is based on Costpoint user groups, you can perform one of the following options.

- **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

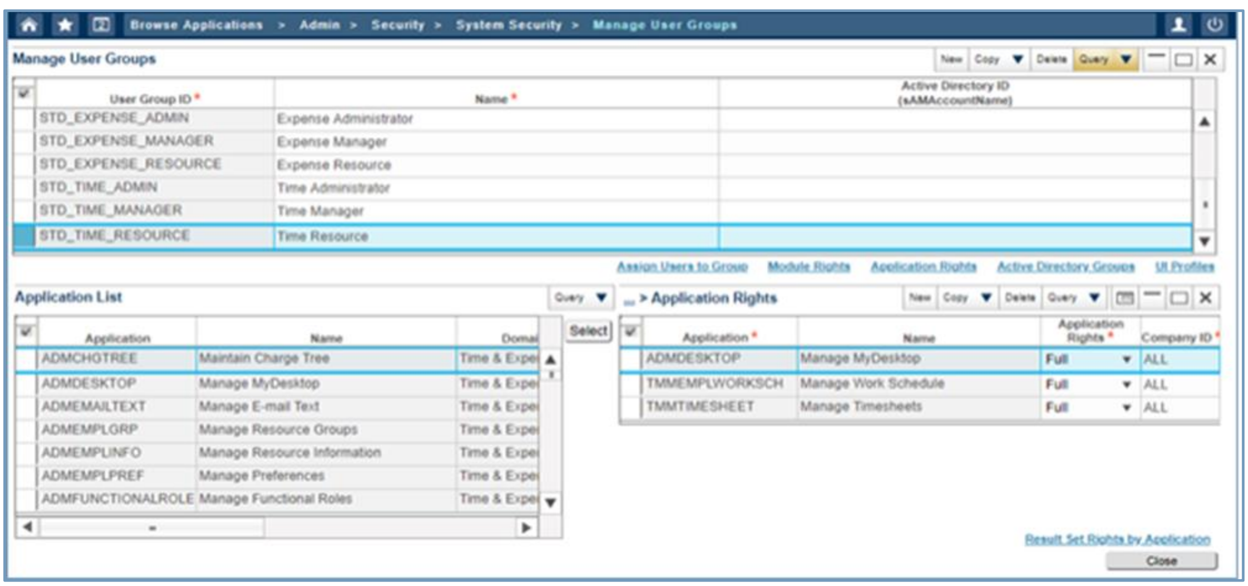
For this option, you need to verify that the required applications are granted to the appropriate Time & Expense user groups. The user groups that you need to verify are based on how your security roles are set up in Time & Expense.

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



> **Note:** In 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.



> **Note:** In 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.

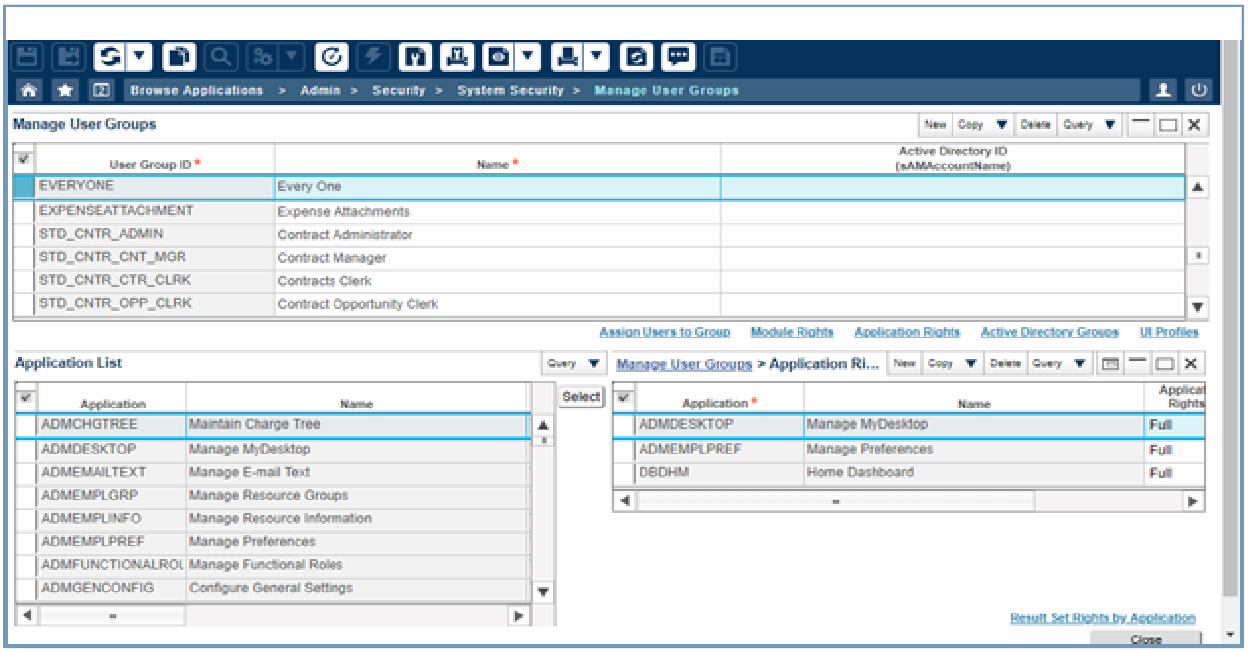
> **Note:** You need to verify all Costpoint User Groups that are mapped to Time and Expense security roles. In this example, you also need to verify **STD_TIME_RESOURCE**.

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:** In 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.

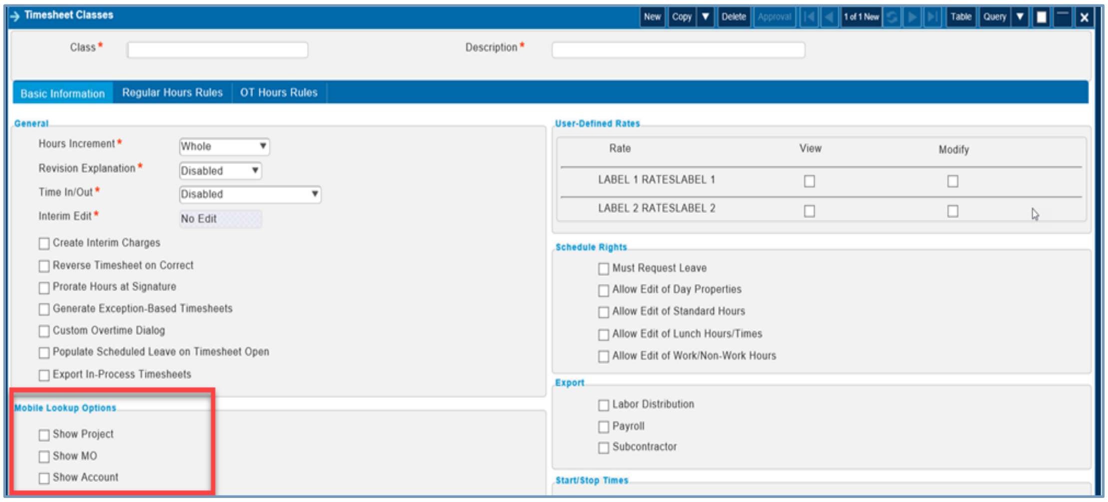
Step 3: Configure Charge Lookup Options

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

To set the default options:

1. In 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 check box next to each lookup option you want to enable:
   - **Show Project**
   - **Show MO**: This option is available only to Costpoint users.
   - **Show Account**



4. Click **Save**.

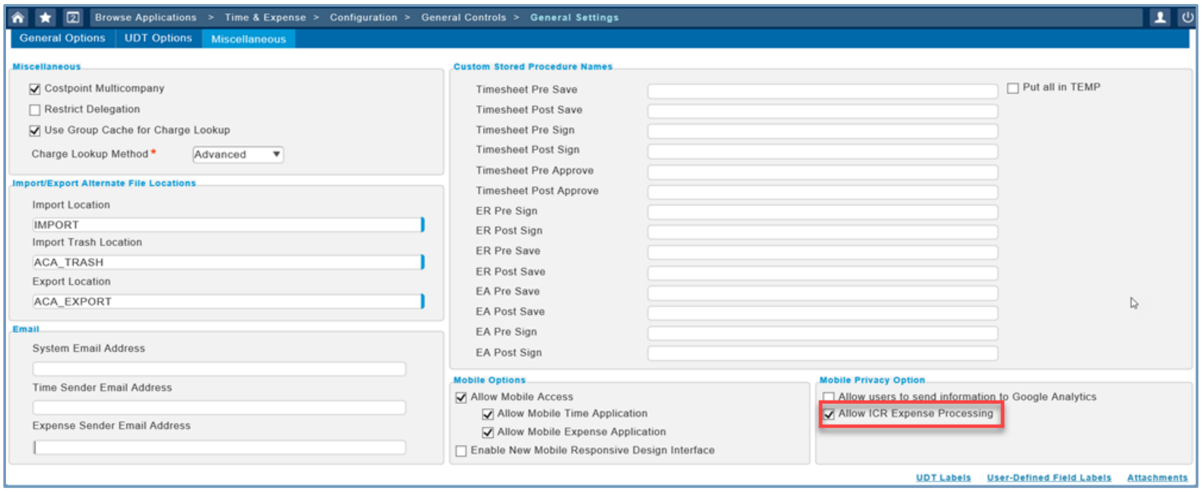
> **Note:** On the **Time & Expense » Configuration » General Controls » Manage Account Types** screen, confirm that the **Time In/Out** and **Start/Stop Times** options are disabled. If these options are enabled, members of this timesheet class will not be able to access Costpoint Mobile T&E.

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. In 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.



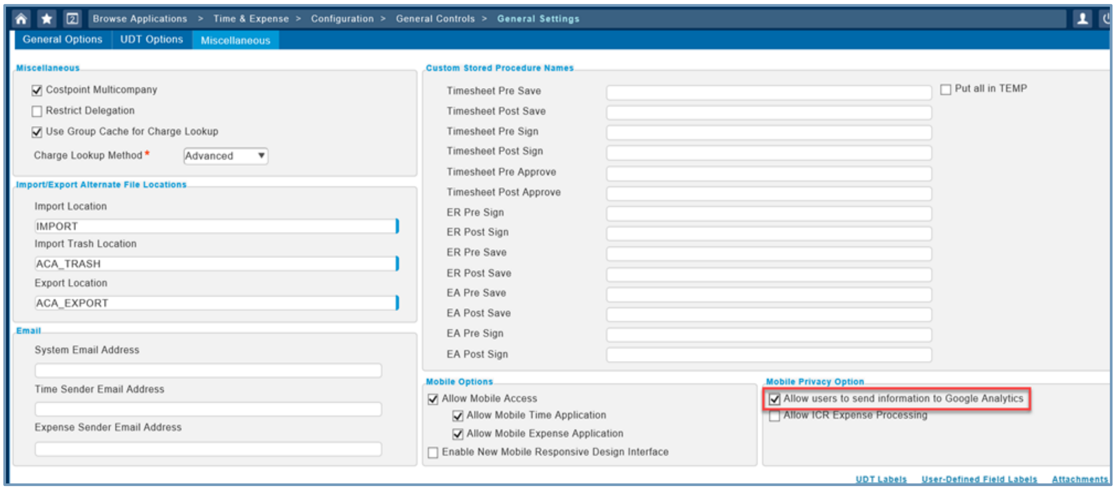
Step 5: Enable or Disable Sending of Information to Google Analytics

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.

To enable or disable sending of information to Google Analytics:

1. In 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 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.



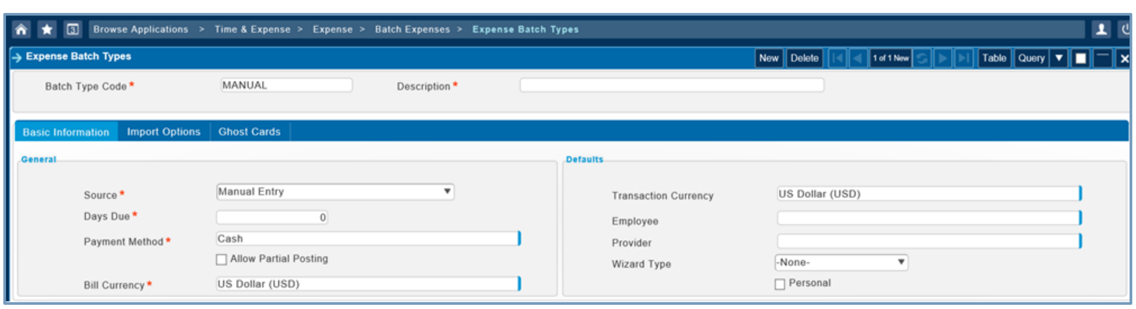
Step 6: Set Up the "MANUAL" Batch Expense Type

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 **MANUA**L 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. In 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.



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

About Deltek

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