Deltek

Deltek Costpoint® Mobile Time and Expense 2.0

Technical Installation and Configuration Guide

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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 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.
- **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.

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.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login.**
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   > **Note:** When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.
   >
   > You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

   Options include:

   - **Complete**
   - **Cumulative Updates**
   - **HotFixes**
   - **Sub-Release**
8. In the table, select the check box that corresponds to the Deltek product that you want to download.

   The right pane displays a message stating that the product has been added to the download queue.

   > **Note:** To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to https://dsm.deltek.com/DeltekSoftwareManagerLite.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon.**
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

> **Note:** The download behavior and download folder may differ depending on the browser and browser settings that you are using.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.
- To view a tutorial on how to use Deltek Software Manager, click here.
- To view more information on troubleshooting Deltek Software Manager, click here.

> **Note:** When you click a link, you will be asked to log into DSM if you aren't already logged in.

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

Prerequisites

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 the embedded WebLogic Web server.

Technical Considerations

You must meet the following requirements to run Costpoint Mobile T&E:

- You must install Costpoint Mobile T&E on an IIS server that is installed on Windows Server 2012 R2, Windows Server 2016, or Windows Server 2019.
- 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.

> **Note:** 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 Costpoint Mobile T&E installer installs PHP 7.4.15 in this release.

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.

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:

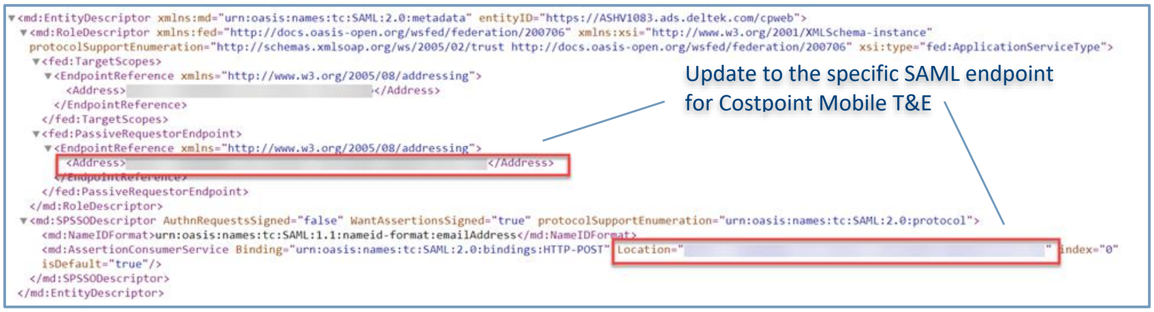
  T10QCM14CLSYS7.ldap.ldapServers=AZUREWEBSAML1,AZUREMOBILESAML1

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 other SAML Provider. These are discussed in the *Deltek Costpoint Security Guide*.

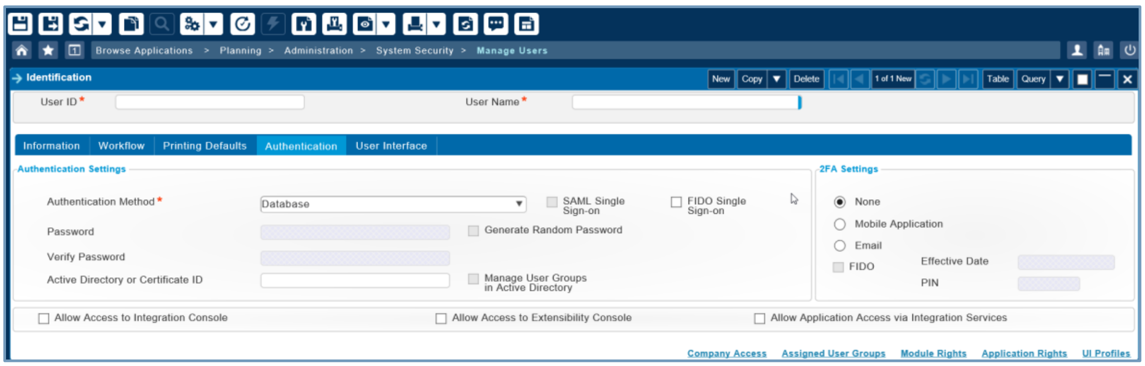
- For ADFS, see the "Configure SAML Single Sign-on between Costpoint and Microsoft AD FS" section.
- For Microsoft Azure, see the “Configure SAML Single Sign-on between Costpoint and Microsoft Azure” section.
- For other SAML providers (Okta and Ping), see the “Configure SAML Single Sign-on between Costpoint 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 Cospoint 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 *Deltek 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, 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 installer will automatically update this setting.

  > **Note:** For more information on how to enable the biometric authentication setting, see "Step 7: Update the Biometric Authentication Setting".

- 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.

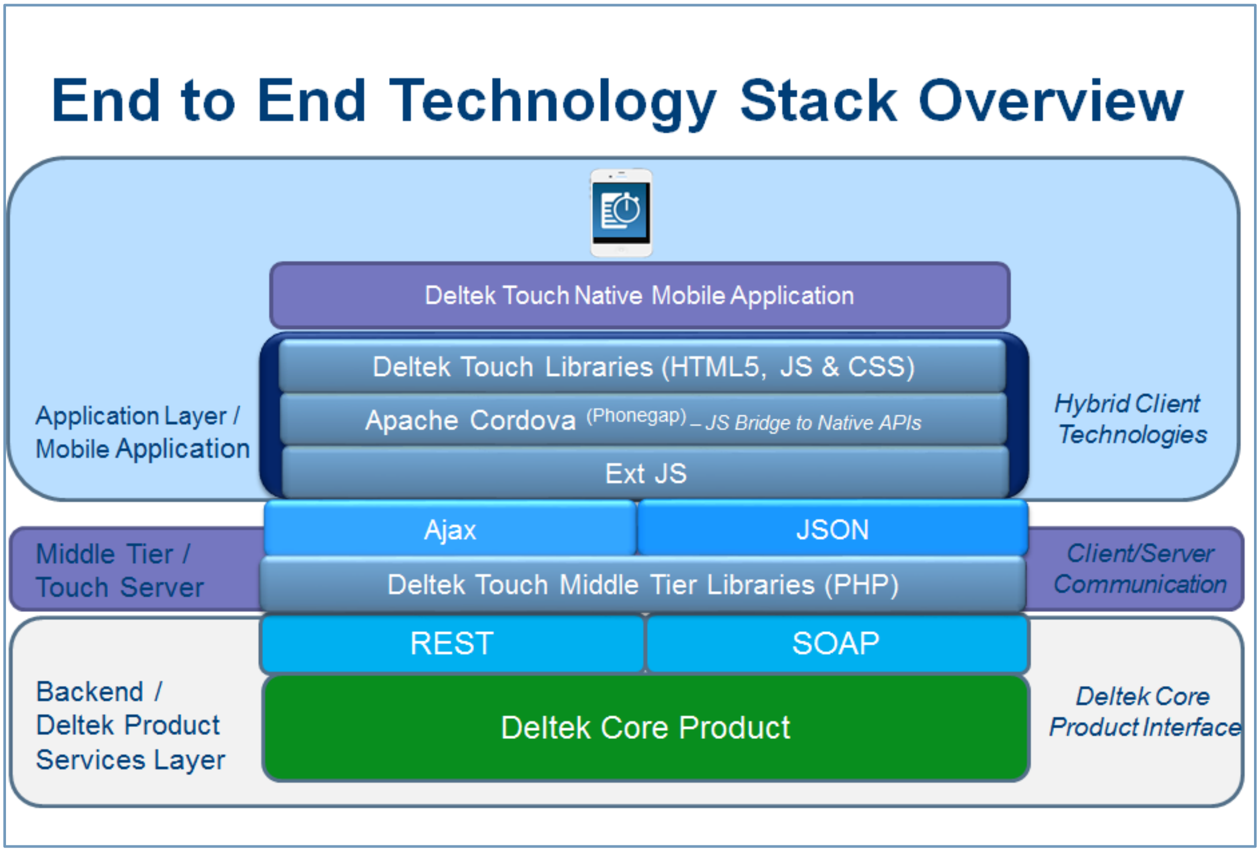
These are issues with Google Android and not with the Costpoint Mobile Time and Expense application.

- 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).

Costpoint Mobile T&E Infrastructure

The Costpoint Mobile T&E infrastructure is composed of the application tier, middle tier, and services tier. The Costpoint Mobile T&E server (middle tier) is used to optimize service delivery and transform data when necessary. The Touch Server only communicates with the product service layer and does not have access to the database.

Technical Platform



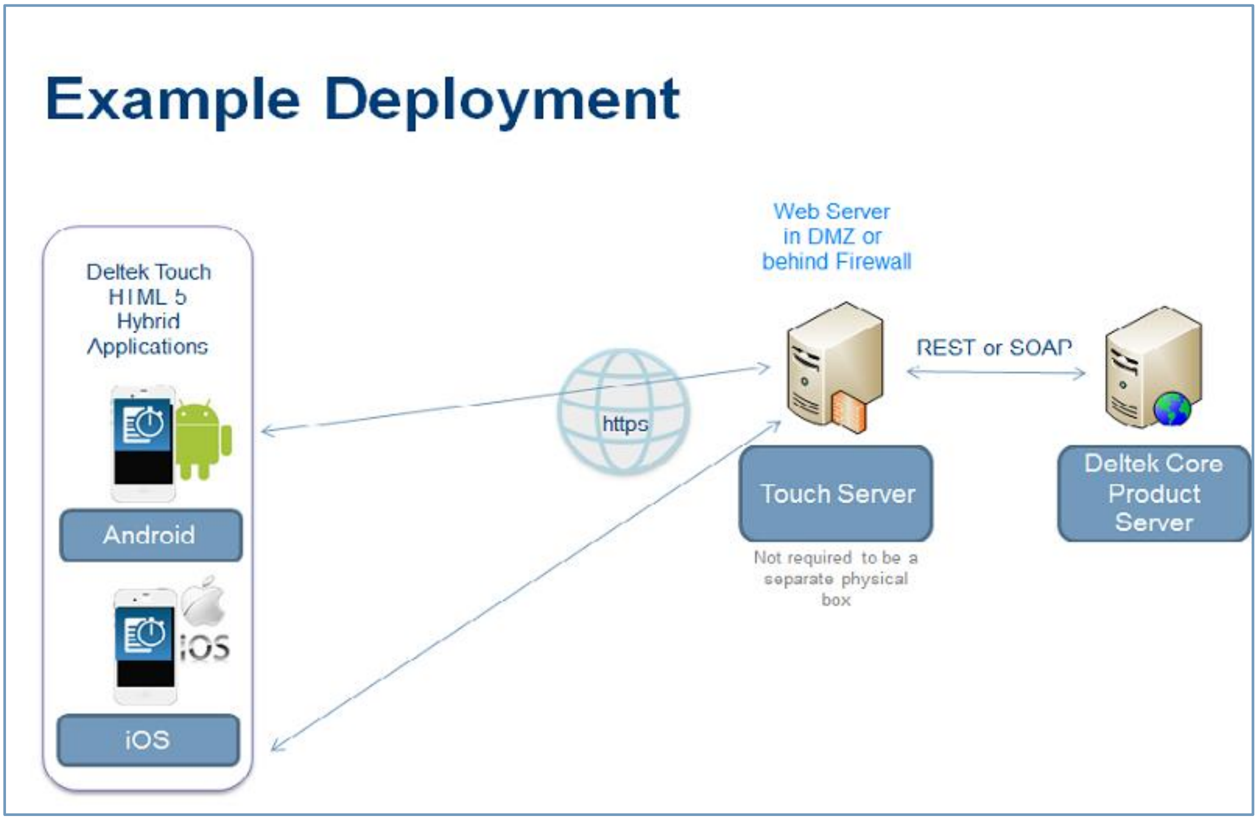
Client Tier and Middle Tier

Costpoint Mobile T&E server (middle tier) optimizes service delivery and provides a platform for future third-party product integration. It is based on Sencha Touch and uses JSON, Ajax, and PHP.

Costpoint Mobile T&E Client (client tier) is a hybrid application created using HTML 5 and CSS 3 but with the ability to access the native device capabilities.

Supported Deployment Scenarios

Costpoint Mobile T&E may be installed on another IIS server or as a separate virtual directory on an existing Costpoint IIS Web server.



Note: Costpoint Mobile requires the use of HTTPS protocol and TLS 1.2.

Configure Microsoft IIS Web Server on Windows 2012 R2 Server

Perform this procedure if you are going to install Costpoint Mobile T&E on Windows Server R2 2012. The Costpoint Mobile T&E installer checks if Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

> **Note:** Costpoint Mobile T&E requires Anonymous Authentication and does not support Basic Authentication.

To configure Microsoft IIS web server on Windows 2012 R2 Server:

1. From the desktop view, display the Charms bar. To do this, take one of the following actions:
   - Move the cursor to the bottom-right corner of the screen, which causes the bar to display on the right.
   - On your keyboard, press the Windows key + **C**.

   > **Note:** This product requires the use of HTTPS protocol when transmitting data over the Internet. HTTPS encrypts the data in transit.

2. Click **Start » Administrative Tools » Server Manager**.
3. On the left pane, click **IIS** and scroll down to the **ROLES AND FEATURES** section.
4. In the **Tasks** field, select **Add Roles and Features**.
5. On the Before you begin page of the Add Roles and Features Wizard, click **Next**.
6. On the Select installation type page, select the **Role-based or feature-based installation** option.
7. On the Select Destination Server page, verify if the **Select a server from the server pool** option is selected, and click **Next**.
8. On the Select server roles page, perform the following steps:
   a. Click **Web Server (IIS) » Web Server » Application Development, and then select CGI and ISAPI Extensions**.
   b. Click **Web Server (IIS) » Web Server » Management Tools, and then select IIS Management Scripts and Tools**.
9. Click **Next**.
10. On the Select features page, click **Next**.
11. When the installation completes, click **Close** to exit the wizard.

Configure Microsoft IIS Web Server on Windows Server 2016 or Windows 2019 Server

Perform this procedure if you are going to install Costpoint Mobile T&E on Windows Server 2016 or Windows Server 2019. The Costpoint Mobile T&E installer checks if Microsoft Internet Information Services (IIS) is already installed before proceeding with the installation. The installation terminates if IIS is not yet installed.

> **Note:** Costpoint Mobile T&E requires Anonymous Authentication and does not support Basic Authentication.

To configure Microsoft IIS web server on Windows Server 2016 or Windows 2019 Server:

1. From the desktop view, display the Charms bar. To do this, take one of the following actions:
   - Move the cursor to the bottom right corner of the screen, which causes the bar to display on the right.
   - On your keyboard, press the Windows key + **C**.

   > **Note:** This product requires the use of HTTPS protocol when transmitting data over the Internet. HTTPS encrypts the data in transit.

2. Click **Start » Administrative Tools » Server Manager**.
3. On the left pane, click **IIS** and scroll down to the **ROLES AND FEATURES** section.
4. In the **Tasks** field, select **Add Roles and Features**.
5. On the Before you begin page of the Add Roles and Features Wizard, click **Next**.
6. On the Select installation type page, select the **Role-based or feature-based installation** option.
7. On the Select Destination Server page, select the **Select a server from the server pool** option, and click **Next**.
8. On the Select server roles page, perform the following steps:
   a. Click **Web Server (IIS) » Web Server » Application Development, and the select CGI and ISAPI Extensions**.
   b. Click **Web Server (IIS) » Web Server » Management Tools, and then select IIS Management Scripts and Tools**.
9. Click **Next**.
10. On the Select features page, click **Install**.
11. When the installation completes, click **Close** to exit the wizard.

Install Costpoint Mobile T&E

Before you proceed, make sure that you downloaded the server component from Deltek Software Manager (DSM). After the server part is installed, download the application from the Apple App Store or Google Play Store and install it in your device.

> **Attention:** For more information about DSM, see Downloading Deltek Products using Deltek Software Manager in this document.

To install the Costpoint Mobile T&E:

1. Run **DeltekCostpointMobileTExx.exe** to launch the installation program.

   > **Note:** Taking into consideration the enhanced security, Deltek recommends selecting the **Run as Administrator** option when launching the installation executable even if you (as the logged-on user) have local administrative rights. You can access this option by right-clicking the installation executable file name in Windows Explorer, and then clicking **Run as Administrator** on the shortcut menu.

2. On the Welcome to the Deltek Costpoint Mobile Time and Expense installation wizard page, click **Next**.
3. On the Choose Application Install Directory page, verify if the default location for Costpoint Mobile T&E is correct, and click **Nex**t. Otherwise, click **Browse** to navigate to the installation folder.

   > **Note:** The default folder is C:\Program Files\Deltek\Touch on a 64-bit machine.

4. On the IIS Website Information page, select or enter the default website, and click **Next**.

   > **Note:** By default, the **Please check the box if the website is configured for SSL** check box is selected to use the HTTPS protocol when transmitting data over the Internet.

5. On the Deltek Costpoint Web Services URL page, enter the Costpoint Web URL (for example, https://myserver.com/cpweb) in the **URL** field, and click **Next**.
6. On the Pre-Installation Summary page, review the installation details that you provided.
   - If you want to change any settings, click **Back**, and make the necessary updates.
   - If you are done, click **Install** to begin the installation.

   > **Note:** If there are errors, the DeltekTouchInstall.log file displays.

7. On the InstallShield Wizard Complete page, click **Finish** when the installation is done.

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 and apply the product license.	
3	Verify application rights assigned to user roles.	
4	Configure charge lookup options.	
5	Configure PIN settings.	
6	Update the Help URL.	
7	Update the Biometric Authentication setting.	
8	Enable or disable ICR processing in expense.	
9	Enable or disable sending of information to Google Analytics.	
10	Set up the “MANUAL” batch expense type.	
11	Set up a task at the expense level both for the expense report type and expense type.	
12	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:

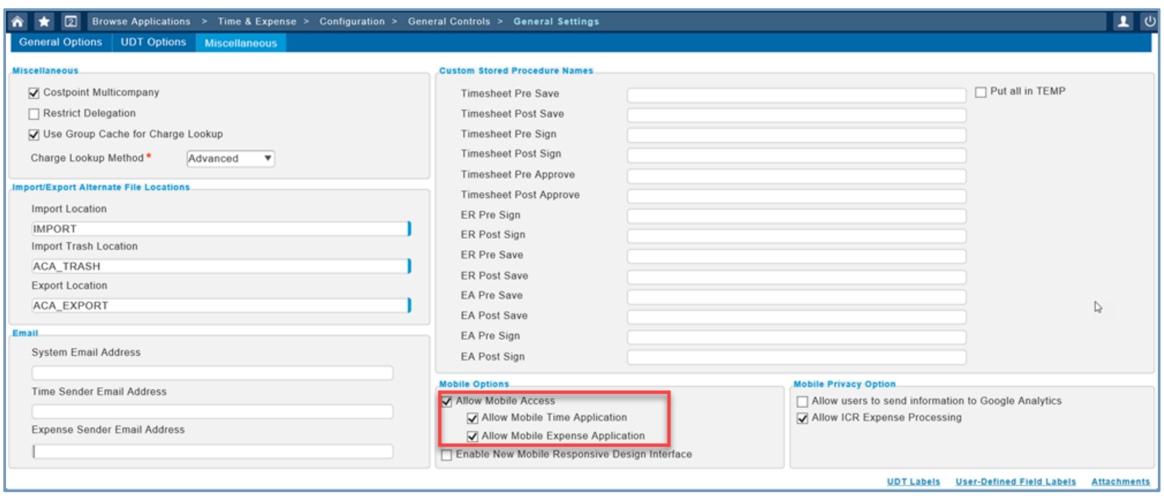
1. On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings,** and then click the Miscellaneous tab.
2. In **Mobile Options**, select **Allow Mobile Access**, and select one or both options:

- 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: 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.”

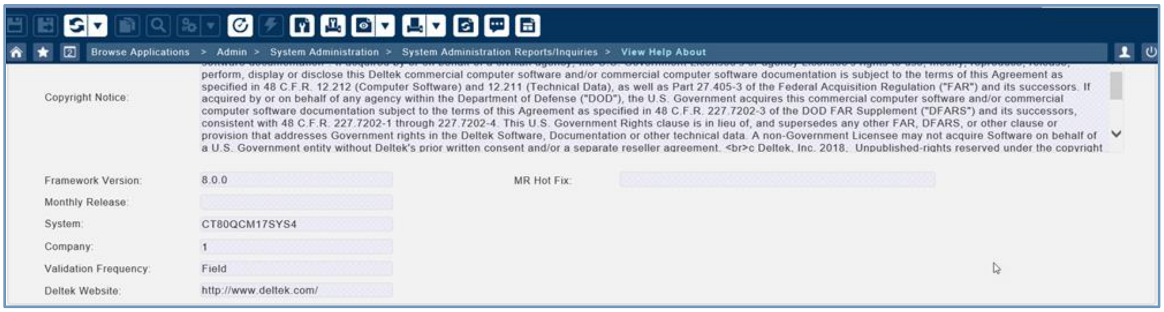


Step 2: Verify and Apply the Product License

Costpoint Mobile T&E requires Costpoint Time & Expense 10.x and Costpoint Maintenance Release 7.1.3, at the minimum.

To determine the version you currently have:

1. On the Costpoint menu, click **Admin » System Administration » System Administration Report Inquiries » View Help About**.



Note: The licensing of Costpoint Mobile T&E is based on “Web Time” and “Web Expense” license keys. If users have a license to Time, or Expense, they will be able to use Costpoint Mobile T&E.

Step 3: 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

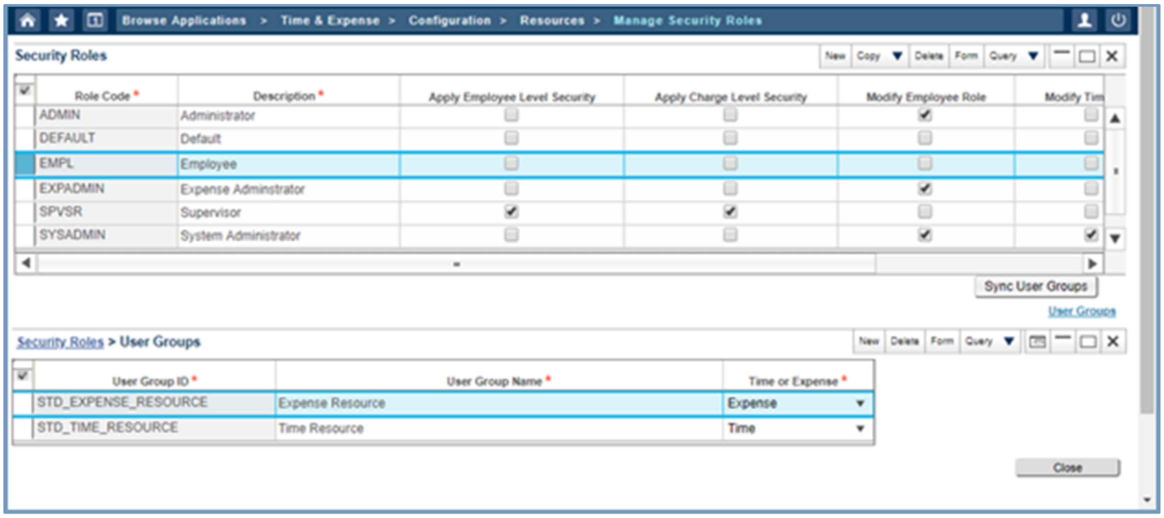
Any Costpoint Mobile T&E user will need appropriate rights for the applications mentioned above. Since Costpoint Time & Expense security is based on Costpoint user groups, you can perform one of the following options.

- **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

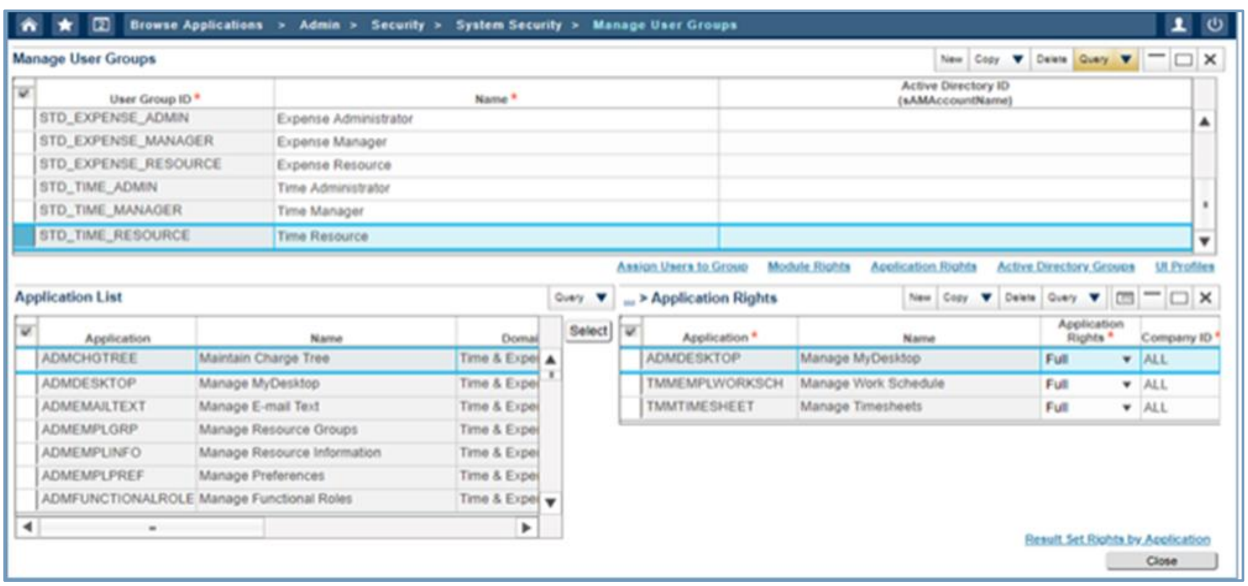
For this option, you need to verify that the required applications are granted to the appropriate Time & Expense user groups. The user groups that you need to verify are based on how your security roles are set up in Time & Expense.

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: 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.



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.

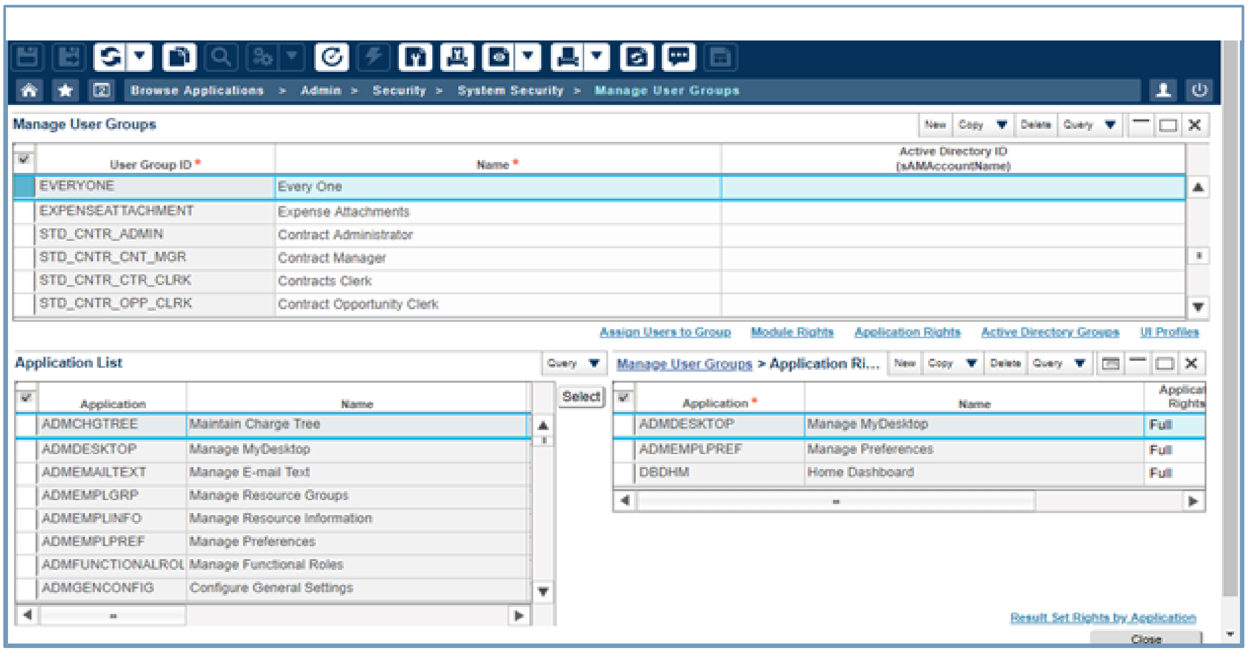
Note: You need to verify all Costpoint User Groups that are mapped to Time and Expense security roles. In this example, you also need to verify **STD_TIME_RESOURCE**.

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.

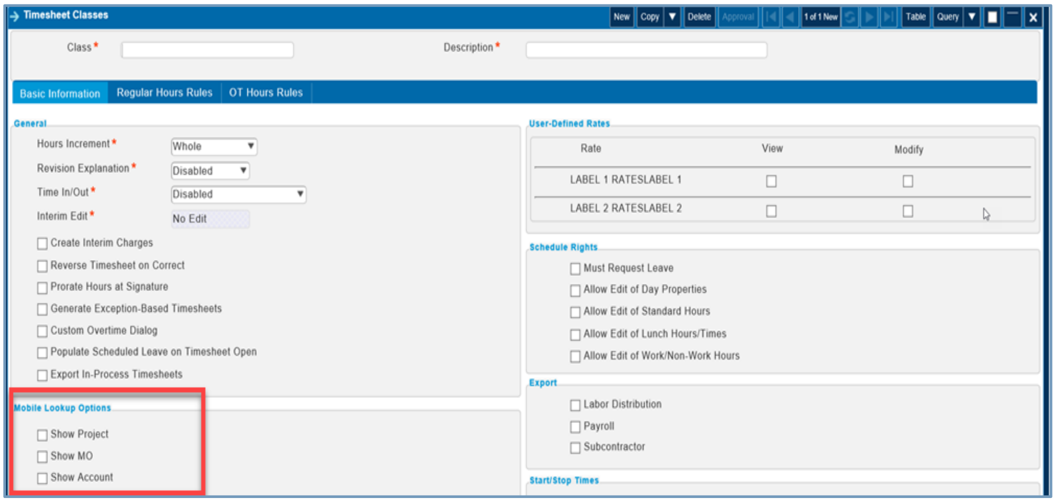
Step 4: Configure Charge Lookup Options

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. 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 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 5: Configure PIN Settings

This step is optional. Use the PIN_SETTINGS section in the **configuration.ini** file located in the installation folder to edit PIN settings.

Setting	Description
MIN_LENGTH	This setting allows you to configure the PIN length from 4 digits (minimum length) up to 12 digits (maximum length). By default, this is set to 6.
COMPLEXITY	When the value is set to **true**, Costpoint Mobile T&E does not allow you to use a repeating PIN (for example, 111111) or a sequential PIN (for example, 123456).
UNIQUE_HISTORY	This setting allows you to set the maximum number of PIN reuse, thus, preventing you from using the same PIN over and over. You can configure this setting up to a maximum value of 6, which means that your current PIN cannot be the same as your last six PINs.

Setting	Description
PIN_EXPIRATION	This setting determines the validity (in days) of your current PIN before Costpoint Mobile T&E requires you to change it. You may enter 0 (meaning no expiration) up to 90. By default, it is set to 90. If you change your password, uninstall Costpoint Mobile T&E, tap **Forget Me on this Device**, or change user, the PIN expiration resets.

Below is a sample PIN SETTINGS section in the **configuration.ini** file.

```
[PIN_SETTINGS]
MIN_LENGTH="6"
COMPLEXITY="true"
UNIQUE_HISTORY="0"
PIN_EXPIRATION="90"
```

> **Note:** By default, the **configuration.ini** is located here: <C:\Program Files\Deltek\Touch\Costpoint\TE\cpshared\backend\configuration>.

Step 6: Update the Help URL

This step is optional and only for on-premises customers.

To change the Help URL and specify the location of your company's documentation, locate **HELPDOCURL = "<Help URL>"** in the **configuration.ini** file and edit its value.

For example:

```
HELPDOCURL =
"https://help.deltek.com/Product/Costpoint/Mobile/DeltekCostpointMobileforTimeandExpenseUserGuide.pdf"
```

> **Note:** By default, the **configuration.ini** is located here: <C:\Program Files\Deltek\Touch\Costpoint\TE\cpshared\backend\configuration>.

Step 7: Update the Biometric Authentication Setting

This step is only for on-premises customers.

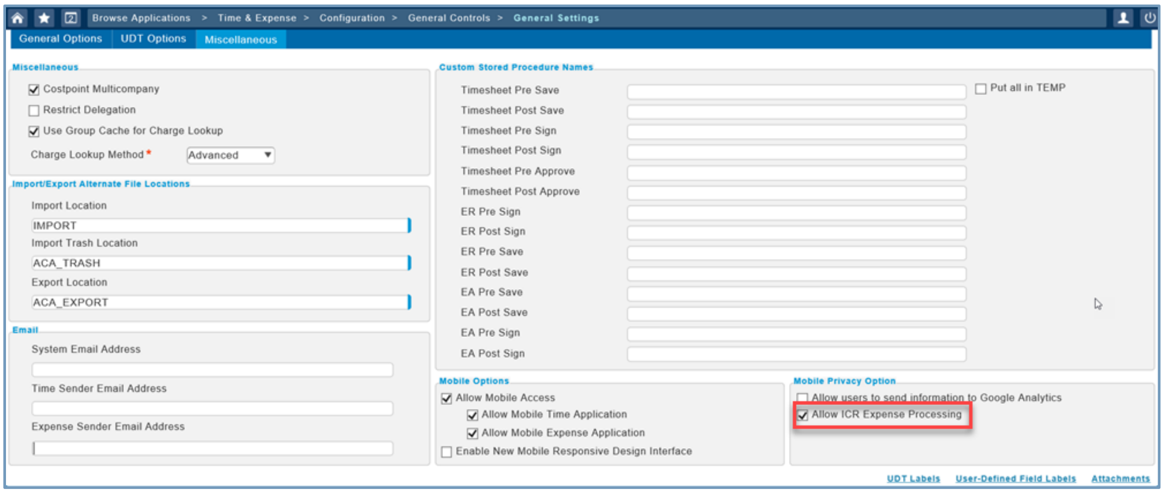
The **ALLOW_BIOMETRICS** setting in the configuration.ini file is set to **true**. The Costpoint Mobile T&E installer automatically updates this setting. If you wish to turn this off, set the setting value to **false**. If you turn off this setting, users will not be able to use biometric authentication.

Step 8: 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.



Step 9: Enable or Disable Sending of Information to Google Analytics

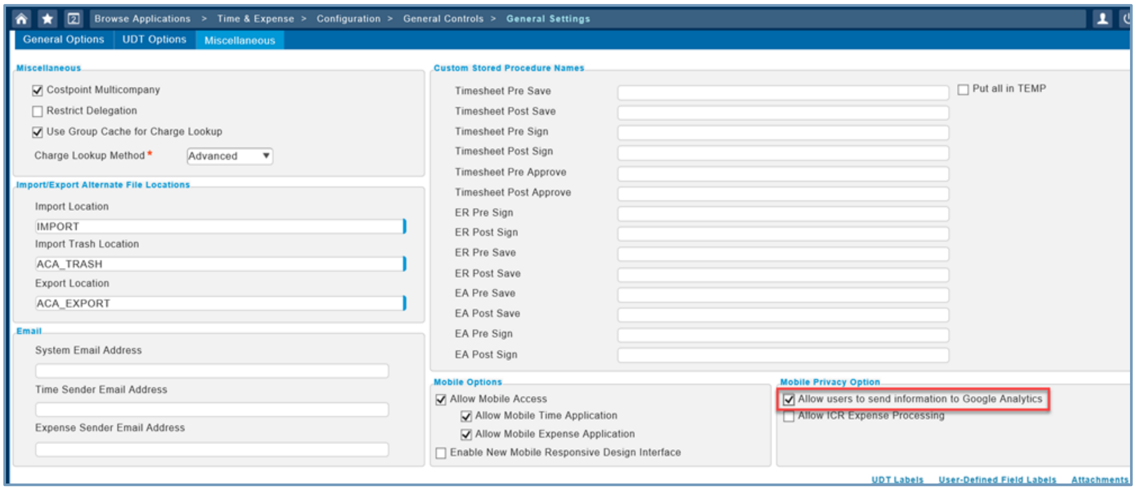
Google Analytics is a tool that Deltek uses to anonymously gather mobile application usage, such as user interface clicks and selections and application crashes. Users opt in for usage tracking when they install and launch the Costpoint Mobile Time & Expense application.

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. 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 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.



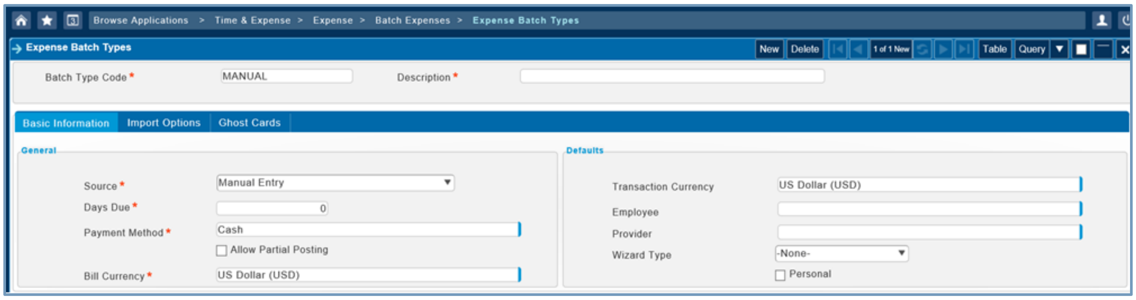
Step 10: Set Up the “MANUAL” Batch Expense Type

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. 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.



Step 11: 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 12: Create the Email Link to Send to Users

Once the Costpoint Mobile T&E application URL has been identified, you can send the URL to your users and allow them to tap the URL from their email on their mobile device in order to pre-populate the Costpoint Mobile T&E application from their mobile device.

> **Attention:** For more information on Costpoint Mobile T&E URL, see Appendix A: Costpoint Mobile T&E URL in Email.

Each application may have specific steps required to create a hyperlink. This procedure describes the steps that apply to Microsoft Outlook. For other applications, see the documentation on creating a hyperlink.

To create the link and send users:

1. Use the following format for the hyperlink:

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

2. 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

3. Create the instructional text in the email message where you will embed the link.
4. Highlight the word “here,” right-click, and select **Hyperlink** from the menu. (Alternatively, click the Insert tab, and click the **Hyperlink** button).
5. Paste the hyperlink into the **Address** field of the dialog box, and click **OK**.

Example email to users:

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 on your device, tap the link below to pre-populate the required URL in the application: <insert your system’s URL found above>

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.

When users receive the email, click the link, and the application is installed, the **Server URL** screen displays.

Appendix A: Costpoint Mobile T&E URL in Email

Logging on for the first time no longer requires users to enter the complete URL of the Costpoint Mobile T&E Server URL. You now send them an email message containing a link that either directs them to the appropriate app store (if Costpoint Mobile T&E is not yet installed) or populates the **Costpoint Mobile T&E Server URL** field with their company URL.

ProductApplication.php

The Costpoint Mobile T&E server has been updated with the ProductApplication.php file that performs the linking and passes the Costpoint Mobile T&E Server URL value to the application or redirects you to the appropriate app store.

Link for Users on iOS Devices

The link that you send to users contains two hyperlinks. The first hyperlink directs you to the Apple App Store, where you can download the application, if it is not yet installed. The second hyperlink populates the **Costpoint Mobile T&E Server URL** field with your company URL. Tap the **Connect** button to connect to the Costpoint Mobile T&E Server.

Link for Users on Android Devices

The link that you send to the users contains a hyperlink. If the application is not yet installed, clicking the hyperlink directs you to the Google Play Store, where you can download the application. After installing the application, clicking the hyperlink again populates the **Costpoint Mobile T&E Server URL** field with your company URL. If the application is already installed, clicking the hyperlink populates the **Costpoint Mobile T&E Server URL** field with your company URL. Tap the **Connect** button to connect to the Costpoint Mobile T&E Server.

Appendix B: 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

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