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# **Deltek Costpoint Mobile Time and Expense in the Cloud 2025.3**

Administrator 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 & Expense database.

This product is for iOS, iPadOS, and Android 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 & Expense (Web) 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 only displays the entered hours. Prorated hours after signing the timesheet will display in the Summary view.
- **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.

**Note:** Succeeding instances of Costpoint Time & Expense (Web) display Costpoint Time & Expense.

## Mobile Device Requirements

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

- Apple iOS 17 or later
- iPadOS 17 or later
- Android 13 or later

In addition, you must have the following default browsers:

- Safari for Apple iOS and iPadOS 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.

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

**Important:** Regardless of the number of SAML providers you have registered per system for Costpoint, Costpoint Mobile T&E supports only one SAML provider.

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.
  - 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.
  - 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/deltektouch/costpoint/te>

The Reply URL is:

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

- In the **enterprise.properties** file, **[system].ldap.ldapServers** is a required property. If multiple SAML providers are configured in this file, Costpoint Mobile T&E will always use the second provider in the list as its authentication provider.

For example, if you have the following entry in the **enterprise.properties** file:

```
T10QCM14CLSYS7.ldap.ldapServers=AZUREWEBSAML1,AZUREMOBILESAML1
```

**AZUREWEBSAML1** will be the authentication provider for Costpoint, while **AZUREMOBILESAML1** will be the authentication provider for Costpoint Mobile T&E.

- If you use the property **[system name].nativeAppProvider=true** in the **enterprise.properties** file, and you have the **For native 'Costpoint Time and Expense' app only** option selected on the Costpoint Configuration Utility screen, Costpoint Mobile T&E will then use the selected SAML provider on this screen as its authentication provider.
- 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 another 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 Costpoint Mobile T&E before uploading the federation metadata XML file into ADFS or Azure.

**For example:**

```
<?xml version='1.0' encoding='UTF-8'>
<md:EntityDescriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" entityID="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:fed="http://docs.oasis-open.org/wsrf/federation/200706" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  protocolSupportEnumeration="http://schemas.xmlsoap.org/ws/2005/02/trust http://docs.oasis-open.org/wsrf/federation/200706" xsi:type="fed:ApplicationServiceType">
  <fed:TargetScopes>
    <EndpointReference xmlns="http://www.w3.org/2005/08/addressing">
      <Address>http://www.w3.org/2005/08/addressing</Address>
    </EndpointReference>
  </fed:TargetScopes>
  <fed:PassiveRequestorEndpoint>
    <EndpointReference xmlns="http://www.w3.org/2005/08/addressing">
      <Address>http://www.w3.org/2005/08/addressing</Address>
    </EndpointReference>
  </fed:PassiveRequestorEndpoint>
  </md:RoleDescriptor>
  <md:SPSSODescriptor AuthnRequestsSigned="false" WantAssertionsSigned="true" protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
    <md:NameIDFormat urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress</md:NameIDFormat>
    <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST" Location="http://www.w3.org/2005/08/addressing" index="0">
    </md:AssertionConsumerService>
  </md:SPSSODescriptor>
</md:EntityDescriptor>
```

- If you are setting up new users to use SAML SSO authentication, use the **Admin » Security » System Security » Manage Users** 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.

**Attention:** For more information, see “Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication” in the *Costpoint Mobile Time and Expense User Guide*.

## 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.

**Attention:** For more information on how to enable the biometrics login, see “Settings Screen” in 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.
- 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 Issue on Android Devices:** Some older Android devices will no longer support Face ID. To use Face ID, devices must support Class 3 biometric strong face authentication.

- 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).

**Attention:** For more information on biometric authentication behavior on different devices, see “Biometric Authentication” in 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 the Costpoint Mobile T&E Application

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 the charge lookup options.	
4	Enable or disable ICR processing in capturing expense.	
5	Set up the "MANUAL" batch expense type.	
6	Set up a task at the expense level both for the expense report type and expense type.	
7	Set up the timesheet and expense classes for a subcontractor.	
8	Assign a seat license and provide module access to a subcontractor.	
9	Make timesheets available offline.	
10	Configure UDTs to allow manual entry.	
11	Configure your timesheet class to use the Time Clocking features.	

### 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 to access and use Costpoint Mobile T&E.

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

- On the Costpoint menu, click **Time & Expense » Configuration » General Controls » General Settings**, and then click the Miscellaneous tab.
- 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 Costpoint Mobile T&E.
- Selecting **Allow Mobile Expense Application** displays **Expense Reports** and **Capture Receipt** in Costpoint Mobile T&E.
- 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 Costpoint Mobile T&E 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 Costpoint Mobile T&E.

For more information on this option, see “Basic Information Tab” in the Costpoint Online Help under **Time » Time Controls » Timesheet Classes**.

**Note:** If both options are cleared and you logged into Costpoint Mobile T&E, you will remain on the PIN and Biometric Login screen of the 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 displays the 'General Settings' page for 'Time & Expense'. The 'Native Mobile Options' section is highlighted with a red box, containing the following checked options:

- ☒ Allow Mobile Access
- ☒ Allow Mobile Time Application
- ☒ Allow Mobile Expense Application
- ☒ Allow Offline Access

Other visible 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', 'Import Trash Location', and 'Export Location'.
- Email:** Fields for 'System Email Address' (SystemCTB82QCM19@DELTEK.com), 'Time Sender Email Address' (time@deltek.com), and 'Expense Sender Email Address' (expense@deltek.com).
- Custom Stored Procedure Names:** Fields for '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 Privacy Option:** A checked checkbox for 'Allow ICR Expense Processing'.

At the bottom right, there are links for 'UDT Settings', 'User Defined Field Labels', and 'Attachments'.

## 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.
EPMEXPOUTSTANDING	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.

**Attention:** For more information, see the *Deltek Time & Expense Technical Guide*.

### 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 Costpoint 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:

**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"/>

**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

**Note:** On the Costpoint menu, click **Time & Expense » Configuration » Resources » 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	

**Application List**

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

**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.

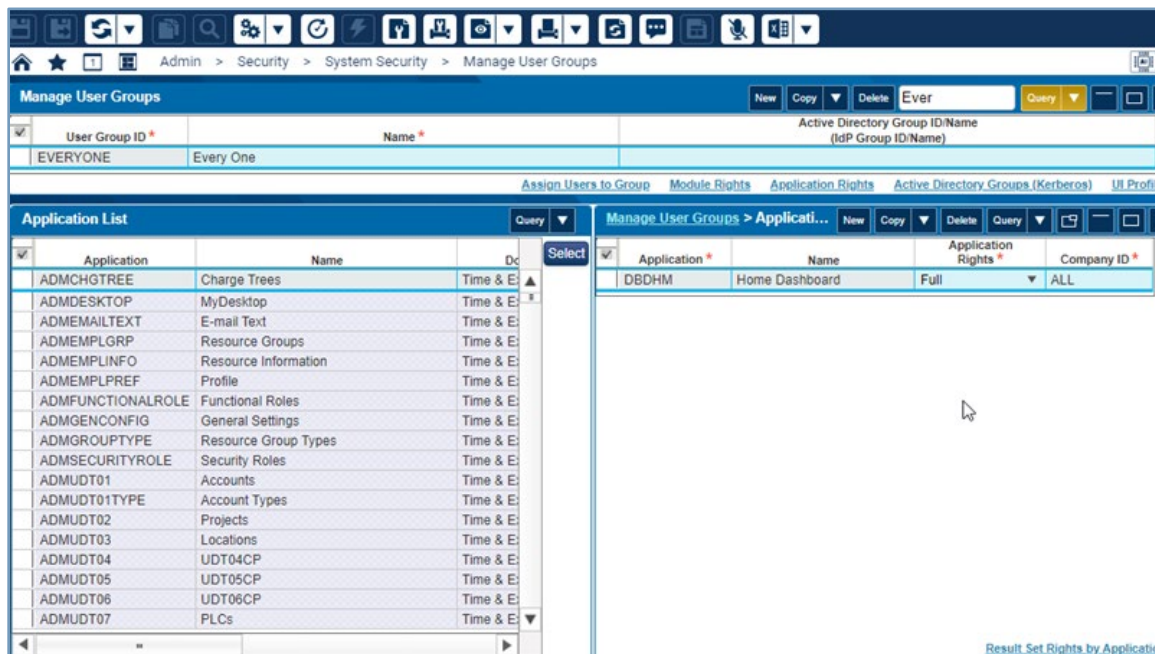
**Note:** You need to verify all Costpoint User Groups that are mapped to Time and Expense security roles. In this example, you also need to verify **STD\_TIME\_RESOURCE**.

## 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 the Charge Lookup Options

Use this procedure to configure the charge lookup options that will be available to users on the Charge Lookup screen of Costpoint Mobile T&E.

**To configure the charge lookup options:**

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » 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 page in Deltak. 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 Validation:** None (dropdown)
- Rounding:** None (dropdown)
- Hours Increment:** Whole (dropdown)
- Total Time Method:** Hour Proration (dropdown)
- Miscellaneous:**
  - Revision Explanation: Disabled (dropdown)
  - ☐ Create Interim Charges
  - Interim Validation: None (dropdown)
  - ☐ Reverse Timesheet on Correction
  - ☐ Generate Exception-Based Timesheets
  - ☐ Populate Scheduled Leave on Timesheet Open
  - ☐ Check for Work Schedule Changes
  - ☐ Do Not Allow Delete Timesheet Line
- Schedule Rights:**
  - ☐ Hide Leave Functions
  - ☐ 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
Billing 01	<input type="checkbox"/>	<input type="checkbox"/>
Labor 02	<input type="checkbox"/>	<input type="checkbox"/>

4. Click **Save**.

5. On the Costpoint menu, click **Time & Expense » Expense » Expense Controls » Expense Classes**.

6. On the Basic Information tab, use the Search feature to select the expense class that you want to configure for Costpoint Mobile T&E.

7. In **Mobile Lookup Options**, select the checkbox next to each lookup option you want to enable:

- **Show Project**
- **Show MO:** This option is available only to Costpoint users.
- **Show Account**

The screenshot shows the 'Expense Classes' configuration page in the Deltek Costpoint Mobile T&E system. The 'Mobile Lookup Options' section is highlighted with a red box. It contains the following options:

- ☒ Allow Mobile Access
- ☐ Show Project
- ☐ Show MO
- ☐ Show Account

Other sections visible on the page include:

- Modify Options:** A table with columns for Status, Expense Report, and Authorization. It shows settings for Submitted, Under Review, and Approved statuses.
- Void Options:** A table with columns for Status, Expense Report, and Authorization. It shows settings for Draft, Submitted, Under Review, Approved, and Rejected statuses.
- Options:** A section with checkboxes for Subcontractor, Display Payment Information on Expense Report, and Allow Quick Entry Expense Report.
- Correction Options:** Includes a dropdown for Expense Corrections (set to 'Not Allowed') and a numeric field for Days Past Expense Report Date (set to 0).
- Advance Options:** Includes a numeric field for Advance Limit (set to 0.00) and a numeric field for Number of Advances Outstanding (set to 0).
- Miscellaneous Options:** Includes a dropdown for Revision Explanation (set to 'Optional') and checkboxes for Modify Exchange Rate and Modify Tax Amounts.

8. 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 Options**, 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 Costpoint Mobile T&E.
  - To disable ICR processing, clear the **Allow ICR Expense Processing** option. The **Use ICR for Expenses** field on the Settings screen in Costpoint Mobile T&E is hidden.



The screenshot shows the 'General Settings' page for 'Time & Expense'. The 'Miscellaneous' tab is selected. In the 'Native Mobile Options' section, the 'Allow Mobile Access' checkbox is checked. Below it, the 'Mobile Privacy Option' section is highlighted with a red box, containing the 'Allow ICR Expense Processing' checkbox, which is also checked. Other sections include 'Custom Stored Procedure Names' and 'Import/Export Alternate File Locations'.

## Step 5: 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** to manually add expenses either from a credit card or from another source using Costpoint Mobile T&E.

**Attention:** For more information, see “Expense Reports” in the *Costpoint Mobile Time and Expense User Guide*.

### 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 to **Manual Entry**.
  - **Days Due:** Enter the number of days on 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 6: 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.

**Attention:** For more information, see “Expense Reports” in the *Costpoint Mobile Time and Expense User Guide* and the following topics in the *Costpoint Online Help*:

- “Tasks Subtask” under **Expense » Expense Controls » Expense Types**
- “Expense Report Types Subtask” under **Expense » Expense Controls » Expense Classes**

## Step 7: Set Up the Timesheet and Expense Classes for a Subcontractor

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

Use these procedures to indicate that the timesheet class or the expense class is for subcontractors.

**Attention:** For more information, see “Mobile Time Access for Subcontractors” and “Mobile Expense Access for Subcontractors” in the *Costpoint Mobile Time and Expense User Guide*.

**Note:** 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 to access and use Costpoint Mobile T&E.

For more information, see [“Allow Access to the Costpoint Mobile T&E Application”](#) in this guide.

## 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' form with the 'Basic Information' tab selected. The 'Export Options' section is highlighted with a red box, showing the following options:

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

Other sections visible include 'Entry Options', 'Miscellaneous', 'Mobile Lookup Options', 'Schedule Rights', and 'User Defined Rates'.

**Attention:** For more information on the Basic Information screen, see [“Basic Information Tab”](#) in the Costpoint Online Help under **Time » Time Controls » Timesheet Classes**.

## 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' configuration screen. The 'Subcontractor Options' section is highlighted with a red box. It contains a checkbox labeled 'Subcontractor' which is currently unchecked. Other sections include 'Modify Options' with a table for Status, Expense Report, and Authorization; 'Mobile Lookup Options' with checkboxes for Allow Mobile Access, Show Project, Show MO, and Show Account; 'Correction Options' with a dropdown for Expense Corrections and a text field for Days Past Expense Report Date; 'Advance Options' with a text field for Advance Limit and a text field for Number of Advances Outstanding; and 'Miscellaneous Options' with a dropdown for Revision Explanation and checkboxes for Modify Exchange Rate and Modify Tax Amounts.

**Attention:** For more information on the Basic Information screen, see "Basic Information Tab" in the Costpoint Online Help under **Expense » Expense Controls » Expense Classes**.

## Step 8: Assign a Seat License and Provide Module Access to a Subcontractor

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

Use this procedure to assign a seat license to a subcontractor user and select the module access you want a subcontractor to have.

**Attention:** For more information, see "Mobile Time Access for Subcontractors" and "Mobile Expense Access for Subcontractors" in the *Costpoint Mobile Time and Expense User Guide*.

**Note:** 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 to access and use Costpoint Mobile T&E.

For more information, see "[Allow Access to the Costpoint Mobile T&E Application](#)" in this guide.

**To assign a seat license and provide module 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**.
3. On the Access subtask screen, set the **Access** column of the **Time and Expense** modules to **Seat**.

The screenshot displays two overlapping windows from the Deltek Costpoint application. The top window, titled 'Resource Information', contains several tabs: Identification, Payroll, and Costpoint Vendor. In the Identification tab, the 'Resource Type' dropdown menu is highlighted with a red rectangular box and is set to 'Subcontractor'. The bottom window, titled 'Access', shows a table with three columns: 'Module', 'Deactivate Date', and 'Access'. There are two rows in the table, both with 'Expense' in the 'Module' column. The 'Access' column for both rows is set to 'Seat'. The 'Access' column is highlighted with a red rectangular box. A 'Close' button is visible at the bottom right of the 'Access' window.

**Attention:** For more information on the Resource Information screen, see "Resource Information" in the Costpoint Online Help under **Configuration » Resources**.

## Step 9: Make Timesheets Available Offline

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 Costpoint Mobile T&E.

**Attention:** For more information, see "Offline Time Entry" in the *Costpoint Mobile Time and Expense User Guide*.

### To allow offline time entry:

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

Time & Expense > Configuration > General Controls > General Settings

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

Import Trash Location

Export Location

Email

System Email Address

Time Sender Email Address

Expense Sender Email Address

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 ER Pre Save ER Post Save EA Pre Save EA Post Save EA Pre Sign EA Post Sign

Put all in TEMP

Native Mobile Options

- ☒ Allow Mobile Access
- ☒ Allow Mobile Time Application
- ☒ Allow Mobile Expense Application
- ☒ Allow Offline Access

Mobile Privacy Option

- ☒ Allow ICR Expense Processing

UDT Settings User-Defined Field Labels Attachments

## Step 10: Configure UDTs to Allow Manual Entry

If a user-defined table (UDT) field is configured for manual entry in Costpoint Time & Expense, the **Manual Entry** field for that UDT field displays on the Edit Charge screen in Costpoint Mobile T&E.

To configure manual entry of a UDT:

1. On the Costpoint menu, click **Time & Expense » Time » Time Controls » Timesheet Classes**.
2. Click the **UDT10CS Links** subtask.
3. Select the **Allow Manual Entry** checkbox of the corresponding pay type.

Timesheet Classes > PAYTYPE Links						
✓	PAYTYPE *	Description	Allow Lookup	Allow Manual Entry	Overtime Type *	Level 1 Overtime Mapping
	ALW	ALLOWANCE PAY TYPE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Level 1	
	EIC	EICP	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	HOL	Holiday Leave	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	NOT	Not an OT pay type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	O	Overtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Level 1	
	PBC	Paid Break Charging	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	R	Regular	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

## Step 11: Configure the Timesheet Class to Use the Time Clocking Features

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

**Attention:** For more information, see “Time Clocking” in the *Costpoint Mobile Time and Expense User Guide*.

## 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 users to enter start/stop times for meals and breaks.
    - **Start/Stop Summary:** Select this option to enable users 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 users 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: 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', and 'Reverse Timesheet on Correction'. The 'Mobile Lookup Options' section includes 'Allow Mobile Access', 'Show Project', 'Show Manufacturing Orders', and 'Show Account'. The 'Export Options' section includes 'Labor Distribution', 'Payroll', 'Subcontractor', and 'Export In-Process Timesheets'. The 'Schedule Rights' section includes 'Must Request Leave', 'Allow Edit of Day Properties', 'Allow Edit of Standard Hours', 'Allow Edit of Lunch Hours/Times', and 'Allow Edit of Work/Non-Work Hours'. The 'User Defined Rates' section is also visible at the bottom.

**Attention:** For more information on the Basic Information Tab screen, see “Basic Information Tab” in the Costpoint Online Help under **Time » Time Controls » Timesheet Classes**.

## 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

Deltek has always 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 Deltek Support Services analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

**Attention:** Find out more about these and other services from the Deltek Support Center.

### Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Deltek Support Services 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 Deltek Support Services analyst online

**Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.



## Access Deltek Support Center


### To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

**Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

## Additional Documentation

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
<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 tap <b>Help</b> on the Costpoint Mobile Time and Expense application.</p>
<i>Deltek Costpoint Mobile Time and Expense FAQ Guide</i>	This document contains some of the commonly asked questions to give you more information about the application.