



Deltek

Deltek Costpoint® Mobile Time and Expense

2.7

Frequently Asked Questions

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Overview

This document presents frequently asked questions related to Costpoint Mobile Time and Expense 2.7.

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.

Costpoint Mobile T&E Questions and Answers

Here are some of the commonly asked questions to give you more information about Costpoint Mobile T&E.

Expense

After I capture a receipt and tap **Submit**, why do I get the “Missing Batch Type for Manual Expense” error?

Your company has not set up the expense batch type **MANUAL** in your Costpoint Time & Expense system. This batch type must be set up first in order for the Expense Capture Receipt feature to work.

Attention: For more information, see "Set Up the “MANUAL” Batch Expense Type” in the *Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

Why can I see the Expense Reports tab but not the Outstanding Expenses tab and the Capture Receipt menu option in the Costpoint Mobile T&E application?

You must have rights to the **PMEXP** application in order to access the Capture Receipt and Outstanding Expenses features of Costpoint Mobile T&E.. Contact your Costpoint Administrator for more information if you feel you should have access to these functions.


Why don't I see the **Capture Receipt** or the **Expense Reports** menu option in the Costpoint Mobile T&E application?

You are either not licensed for the Expense module or your Costpoint Administrator does not allow you to access the Mobile Expense features of the Costpoint Mobile T&E application. Contact your Costpoint Administrator for more information if you feel you should have access to these functions.

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

How do I add my captured receipt to an expense report?

There are 2 ways to add a captured expense to an expense report.

- After capturing the image, verifying the data, and saving the receipt, tap **Save to Expense Report** on the Add Expense screen.
- On the Expense Reports screen, tap an existing expense report, and then tap . On the Expense Details screen, tap the **Expense Type** field, and then tap an expense type. Tap the **Outstanding Expense** field, and then tap a captured receipt from the list of outstanding expenses that matches your selected expense report type.

Attention: For more information, see “Adding an Outstanding Expense to an Existing Expense Report” in the *Costpoint Mobile Time and Expense User Guide*.

After using Capture Receipt, why doesn't data from my captured receipt populate the fields on the Add Expense screen?

Costpoint Mobile T&E did not perform ICR processing on the captured receipt. Make sure that the **ICR for expenses** option on the Settings screen of Costpoint Mobile T&E is set to **On**. Also, check with your Costpoint Administrator and make sure that your company allows ICR processing of captured receipts.

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

Timesheet

How do I get a predefined explanation when I make changes to a timesheet?

When you make changes to a timesheet, the preset revision explanations display in the application only if Costpoint Time & Expense is configured for it.

Attention: For more information, see “Configure Preset Revision Explanation Feature” in the *Deltek Time & Expense Post-Installation Configuration Guide*.

Login

Why doesn't anything happen when I click the Login button?

This is most likely the result of having the wrong URL entered in the app. Check the URL entered in the application; it should end with [/DeltekTouch/Costpoint/TE/](#). For the complete URL, check with your system administrator.

When I log into the application using RSA Authenticator with biometric authentication, I get a white blank screen with a **Done** button.

Tap the **Done** button.

After logging into the application using SAML Identity Provider Authentication, I am redirected to the Costpoint Web interface instead of the mobile application interface.

This is most likely because you have not created a separate entity for Costpoint Mobile T&E, or you may have set the same reply address for the Costpoint Web and Costpoint Mobile T&E entities.

If you already have one Azure setup for Costpoint and you would like to add another one for Costpoint Mobile T&E, you must use a different entity ID URL for Costpoint Mobile T&E.

The Entity ID is a unique identifier for a SAML entity. The Entity ID for Costpoint Mobile T&E must be unique (no other application is set up with the same name) and should be a URL that starts with **https://**, for example: <https://CostpointTEMobile>.

The Reply URL is the location to which Azure AD will send the authentication response. The Reply URL format is:

Your organization's Costpoint Mobile T&E URL+ /cpshared/backend/samltokenreturn.php

For example:

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

The Reply URL is <https://johnsmithcorp.com/costpoint/te/cpshared/backend/samltokenreturn.php>

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

For example:

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

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

T10QCM14CLSYS7.Idap.IdapServers=AZUREWEBSAML1,AZUREMOBILESAML1

Attention: For more information, see "User Authentication using SAML Single Sign-On (SAML SSO) Mode" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

Offline Time Entry

What can I do in offline mode?

You prepare for an offline time entry each time before you go offline by tapping **Make Timesheets Available Offline** on the menu. Offline time entry allows you to download three timesheet periods: previous, current, and next (if existing). You are not allowed to create a new timesheet period and add timesheet line/charge. If you make changes to the timesheets when offline, and then you go back online, Costpoint Mobile T&E displays the Sync Records screen, where you can sync or discard offline timesheet data. When you choose to sync offline timesheet data, additional options are displayed on the screen.

What happens to the offline timesheet data when you change your PIN?

Offline timesheet data are retained and are still accessible using your new PIN.

What happens to the offline timesheet data when you tap **Forget Me On This Device** on the Settings screen?

Offline timesheet data are deleted.

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


Subcontractor Time and Expense Entry

Can Subcontractors enter timesheets and expense reports in Costpoint Mobile T&E?

Yes. Subcontractor time and expense entry is supported beginning with Costpoint Mobile T&E version 2.1, with Costpoint version 8.1 and higher. When you add a timesheet charge or an expense charge or perform a search, the Lookup screen displays only the Work Assignment IDs to which you are assigned.

Leave


Can I submit leave requests using the application?

Yes. On the Leave screen, tap  **Add** located at the bottom of the screen. The Request Leave screen displays, where you enter or specify the values in the appropriate fields. Upon tapping **Apply**, your supervisor will be notified of the leave request through an email notification. The supervisor will use the **Approve Leave** task to (on the Tasks screen) to take action on the submitted leave requests.

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

Time Dashboard

How do I access the Time Dashboard?

On the Timesheet screen, tap , and then tap **View Summary**. On the Timesheet-Summary screen, each of the tabs contains the **Chart View** icon. Tapping the icon displays the dashboard chart that corresponds to the tab you are viewing.

- On the Day tab, tapping **Chart View** displays the Period Breakdown chart.
- On the Charge tab, tapping **Chart View** displays the Charge Breakdown chart.
- On the Pay Type tab, tapping **Chart View** displays the Pay Type Breakdown chart.

Attention: For more information on these charts, see “Summary View” in the *Costpoint Mobile Time and Expense User Guide*.

What is the Time Dashboard?

The Time Dashboard is a representation of hours in graphical form based on scheduled hours and worked hours, including a visual representation of regular and overtime hours.

What does the Time Dashboard show me?

The dashboard displays hours for today, week, or charge based on your work schedule and how many total hours have been charged per day, period total, and pay type.

Can I navigate to another day?

No. The dashboard is primarily for use each day.

Can I see the activity per day based on projects that I have on the Timesheet?

On the Timesheet-Summary screen, tap the Charge tab, and then tap **Chart View** to display the Charge Breakdown chart, which shows a list of charges (non-cost-only pay types) on the timesheet with the total hours for each charge, displayed from highest to lowest.

Session Timeout Notification

What is session timeout notification?

The session timeout notification is displayed when a session is about to expire. The timeout notification, which defaults to 15 minutes of inactivity, is set up on the Touch server.

When do I get notified that I am about to be logged out?

The notification displays 1–2 minutes before the session reaches the 15 minutes of inactivity. Costpoint Mobile T&E will not be brought up to the front if you have other applications opened on your device. You must open and display the application on the device's screen.

How do I get notified?

The device's screen will display the notification that you are about to be logged out. All unsaved data will be lost if you do not tap **Yes** and save your changes.

What happens if I tap **No** or wait and not respond on the notification?

The Costpoint Mobile T&E application will close, and any unsaved changes will be discarded.

Round Fractional Hours Based on Hours Increment in the Timesheet Class Setting

Why do hours change to something different when I enter a value?


Costpoint Mobile T&E will round the fractional hours to the nearest fraction based on setting and entry.

- If **Hours Increment = Whole**, fractional hour is set to .00.
For example:
 - If you enter 2.5, 2.6, 2.7, 2.8, or 2.9, hours entry is set to 3.00
 - If you enter 2.1, 2.2, 2.3, or 2.4, hours entry is set to 2.00.

- If **Hours Increment = Half**, fractional hour is set to .00 or .50.
For example:
 - If you enter 2.1 or 2.2, hours entry is set to 2.00.
 - If you enter 2.3, 2.4, or 2.5, hours entry is set to 2.50.
 - If you enter 2.6, 2.7, 2.8, or 2.9, hours entry is set to 3.00.
- If **Hours Increment = Quarter**, fractional hour is set to .25, .50, .75, or .00.
For example:
 - If you enter 2.1 or 2.2, hours entry is set to 2.25.
 - If you enter 2.3, 2.4, or 2.5, hours entry is set to 2.50.
 - If you enter 2.6 or 2.7, hours entry is set to 2.75.
 - If you enter 2.8 or 2.9, hours entry is set to 3.00.
- If **Hours Increment = Tenth**, fractional hour is set to .10, .20, .30, .40, .50, .60, .70, .80, .90, or .00.
For example:
 - If you enter 2.10, 2.11, 2.12, 2.13, or 2.14, hours entry is set to 2.10.
 - If you enter 2.15, 2.16, 2.17, 2.18, or 2.19, hours entry is set to 2.20.
- If **Hours Increment = Hundredth**, rounding is not required.

Improved Favorites Functionality

How do I manage my favorites?

To display the Manage Favorites screen on Timesheet screen or Expense Report screen, tap , and then tap **Manage Favorites**.

Can I delete existing favorite lines?

Yes. Swipe the row either to the left or right, and tap the delete icon.

Can I change other attributes about favorites?

Yes. Each favorite displayed on the Manage Favorites screen has a toggle button based on your timesheet class configuration. For example, if your timesheet is set up to automatically enter scheduled vacation hours when it loads favorites, the **Vacation** field with a toggle button displays. Toggle the button for a field to on or off, and save your changes.

Can I save the same favorite charge twice?

The primary charge UDT records are UDT02 (Project), UDT01 (Account), and Work Assignment ID. These records can be saved in combination with other non-primary UDT records that are editable but not the exact UDTs. If a charge is selected, the UDT default values are not saved to favorites unless you select the UDT using **Lookup Charges** before saving it as a favorite.

When adding a charge to the timesheet, why is the **Favorite** field set to **On**?

When adding a charge to a timesheet by tapping a favorite charge on the Favorites tab, loading the timesheet line sets its **Favorite** field to **On**. If you change any UDT on the timesheet line, the record is no longer a favorite charge, and the **Favorite** field will be set to **Off**. This allows you to change the UDT (for example, UDT07), and set the toggle to **On** to save the timesheet line as a separate favorite line with the new UDT values.

Viewing of Calculated Overtime Charges

What is the benefit of viewing the calculated overtime charges?

Calculated overtime (OT) hours display if your timesheet is configured to automatically calculate overtime. The OT hours display allows you to see how the entered hours are distributed.

Why do I see “...” next to the regular hours and overtime hours?

This means the hours on the timesheet have changed but are not yet recalculated and distributed as overtime hours. You must save the timesheet to reflect the changes.

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 Deltek Customer Success 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 Customer Success 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 Customer Success 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.

About Deltek

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