Deltek

Deltek Costpoint®
Mobile Time and Expense 2.7

Technical Installation and Configuration Guide

December 6, 2024

Contents

Overview

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

> **Note:** SSL is a term commonly used when referring to both Secure Sockets Layer technology and its successor, Transport Layer Security (TLS). Although you may see references to SSL in this guide and in the application's user interface, all Deltek applications use current TLS protocols to provide protected connections between web servers and web browsers.

This document provides instructions for the installation and 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.

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 checkbox 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 are not already logged in.

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 12 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.

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 and Costpoint 8.1, 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. You must use the TLS 1.2 or TLS 1.3 protocol and configure the IIS server to support "Forward Secrecy" for all deployments.

- 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 2016, Windows Server 2019, or Windows Server 2022.

- When using Secure Sockets Layer (SSL), you must have a certificate issued by a trusted certificate authority. You must not use self-signed certificates. Wildcard certificates are acceptable if they come from a trusted certificate authority.

> **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.
>
> - To comply with the new mobile application security requirements, the feature to populate the Costpoint Mobile T&E Server URL via email when logging on to the application for the first time is no longer supported. If you attempt to use this feature, Costpoint Mobile T&E will display an "unspecified error" message and will automatically close.
>
> - The Costpoint Mobile T&E installer installs PHP 8.3.12 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.
>
> 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.

  - 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/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.
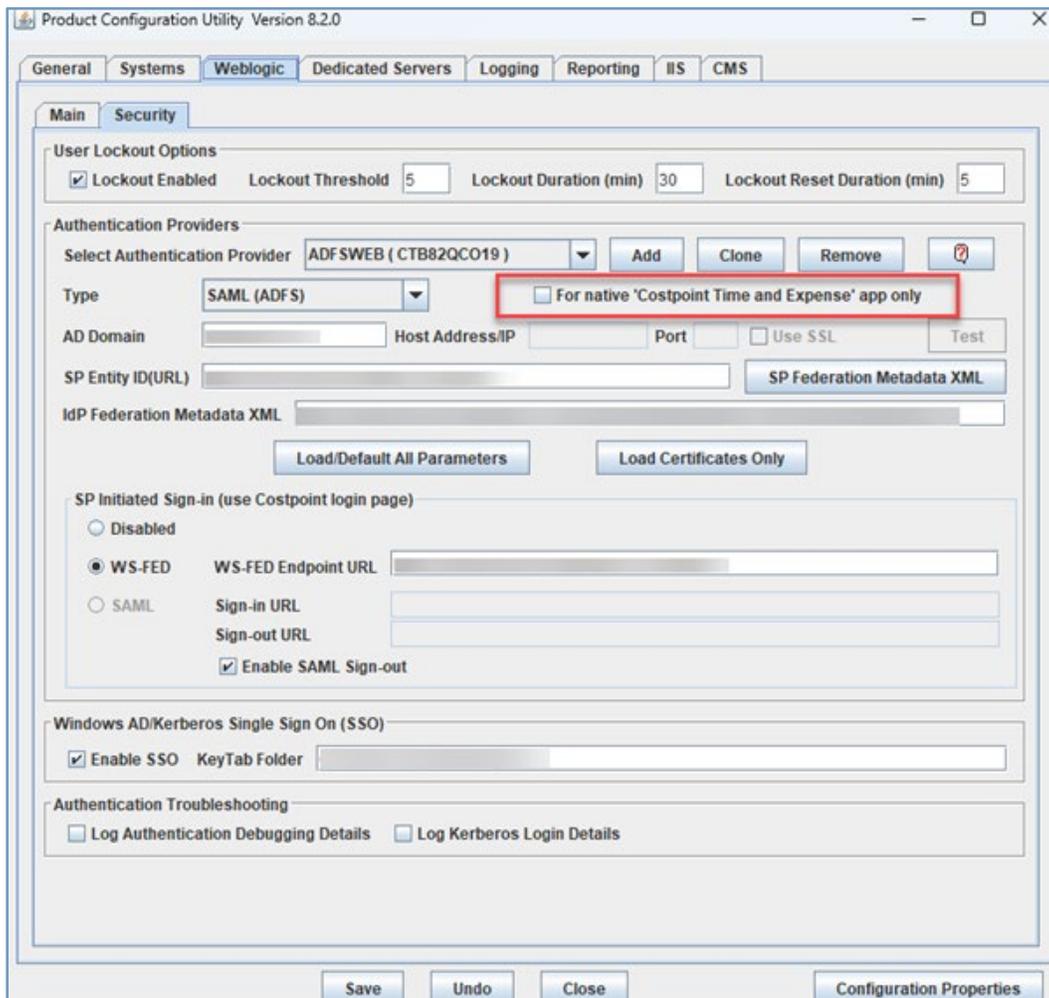
- The overall configuration process is very specific for each SAML Identity Provider. However, there are a few key things to keep in mind when configuring another SAML Provider. These are discussed in the *Deltek Costpoint Security Guide*.

  - 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 Costpoint Time & Expense 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 app 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 **Admin » Security » System Security » Manage Users** screen in Costpoint.
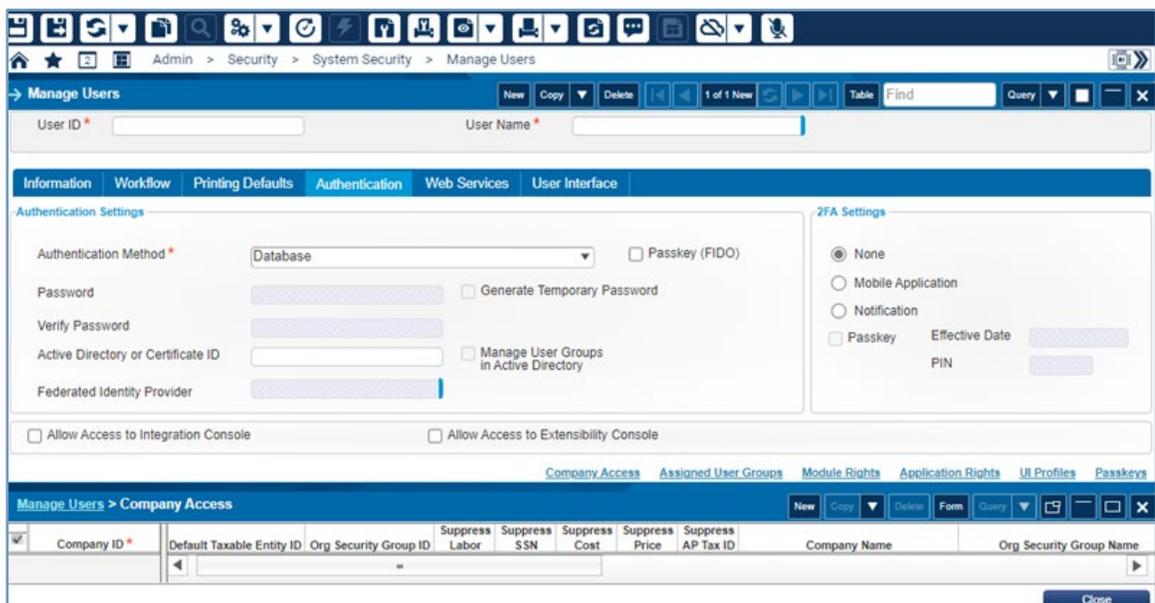
  If a user is already set up for SAML SSO authentication in Costpoint, you will need to assign the mobile authentication provider to the user or user group on the third-party authentication server.

> **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* under **Getting Started**.

Biometric Authentication

You can log into Costpoint Mobile T&E using the biometric authentication feature. This functionality is controlled by a server setting, which allows you to enable or disable the biometric login on the Settings screen in Costpoint Mobile T&E, if enabled.

> **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.

  > **Attention:** For more information on how to enable the biometric authentication setting, see "Update the Biometric Authentication Setting" under **Set Up Costpoint Mobile Time and Expense** in this guide.

- You are using a device that supports biometric authentication:
  - Fingerprint on Android devices
  - Touch ID on all supported Apple devices
  - Face ID on all supported Apple devices

  > **Known 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 has a passcode, which is required).

  > **Attention:** For more information on biometric authentication behavior on different devices, see "Biometric Authentication" in the *Costpoint Mobile Time and Expense User Guide* under **Getting Started**.

- 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.

Certificate Validation

Costpoint Mobile T&E supports Secure Sockets Layer (SSL) certificate validation.

The Costpoint Mobile T&E application validates the SSL certificate used for the Costpoint Mobile T&E Server URL against the fingerprint you configured in the following settings of the **configuration.ini** file: **SSL_CERT_FP1** and **SSL_CERT_FP2** (optional).

To support a smooth transition when the SSL certificate expires, the fingerprint of both the old and new certificates should be provided. Use the SHA-256 certificate fingerprint for these entries. This validation is optional and only done with the native mobile application.

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

Adding Allowed Hosts

Costpoint Mobile T&E supports adding a list of host names that can perform requests on the Costpoint Mobile T&E Server. The host names usually use the same domain as the Costpoint Mobile T&E Server URL.

The host names are entered in the **[ALLOWED_HOST]** section of the **configuration.ini** file following this format: **ALLOWEDHOST[] = "te.domain.com."**

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

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

End to End Technology Stack Overview
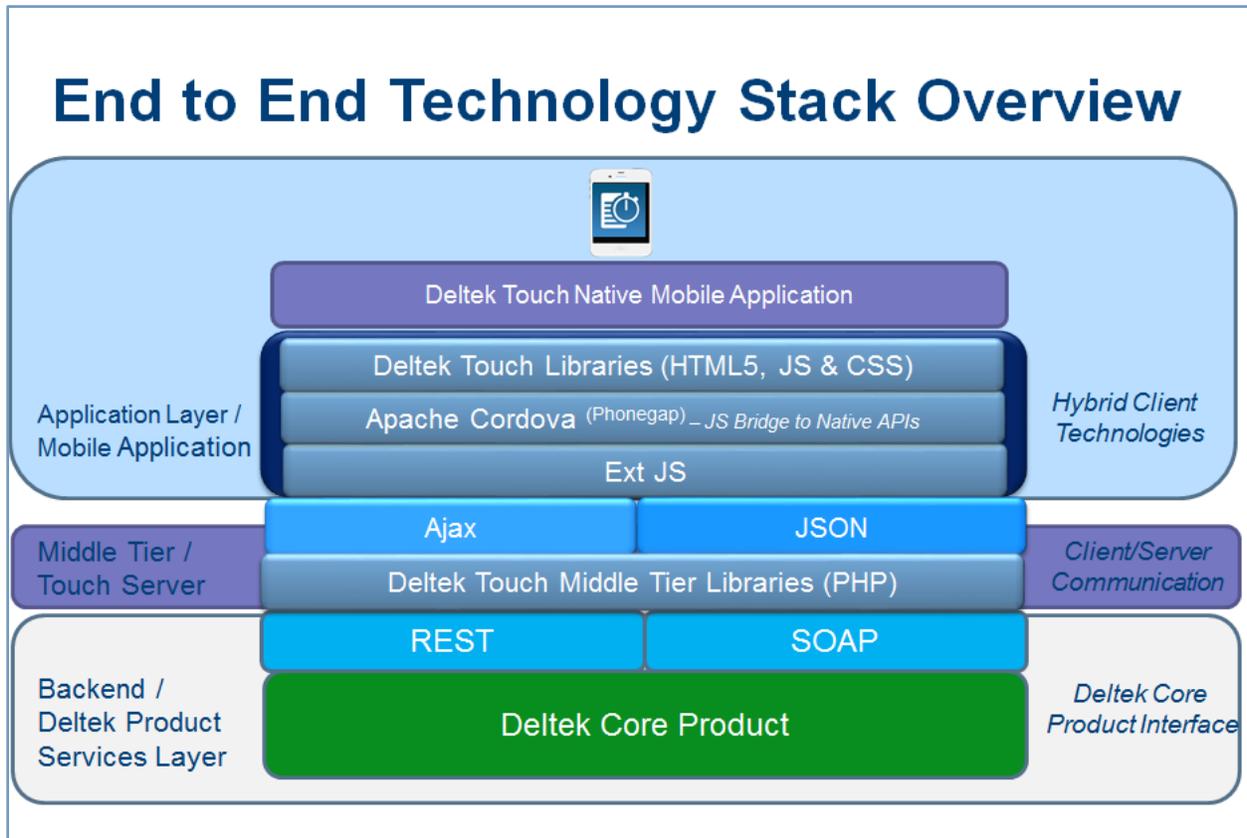
Client Tier and Middle Tier

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.
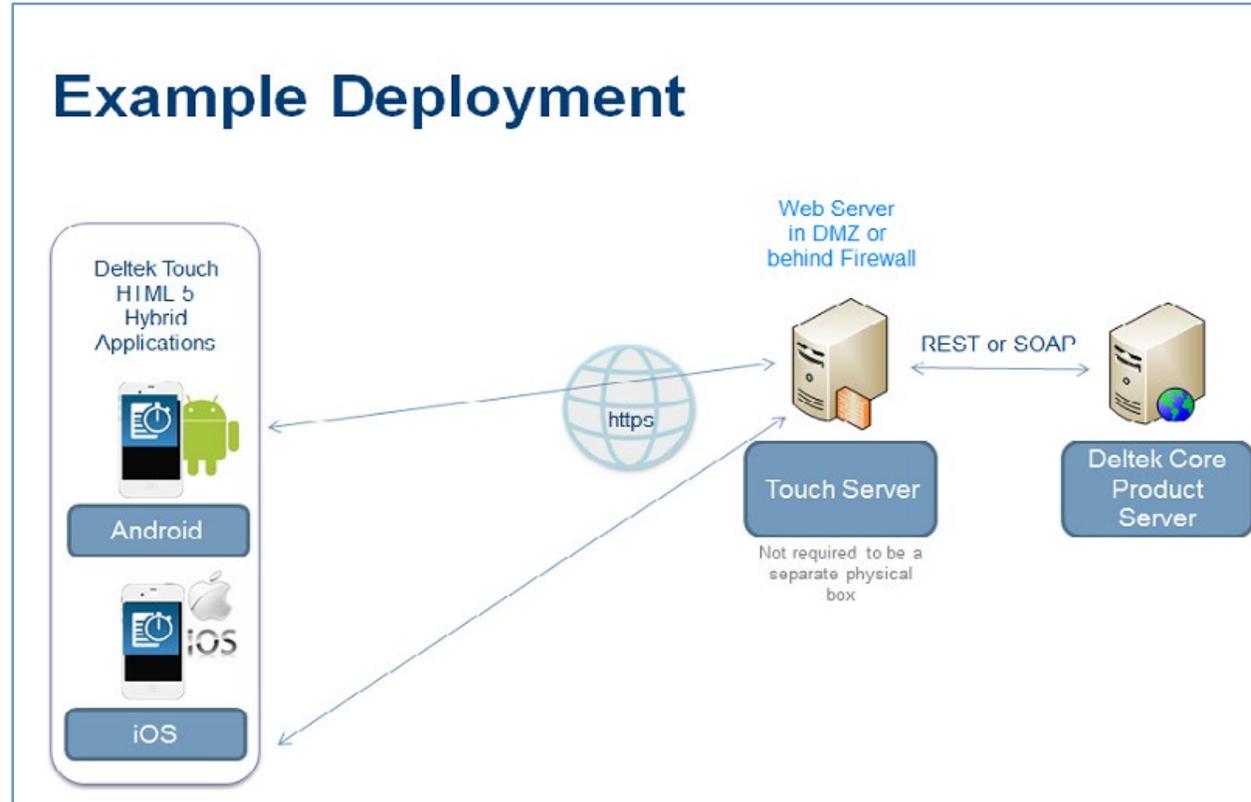
> **Note:** Costpoint Mobile T&E requires the use of HTTPS protocol and TLS 1.2.

Configure the Microsoft IIS Web Server on Windows Server

Perform this procedure if you are going to install Costpoint Mobile T&E on Windows Server 2016, Windows Server 2019, or Windows Server 2022. 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 the Microsoft IIS web server on Windows 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 is complete, 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 guide.

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** checkbox 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 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 and apply the product license.	
3	Verify application rights assigned to user roles.	
4	Configure the 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	Set up the "MANUAL" batch expense type.	
10	Set up a task at the expense level both for the expense report type and expense type.	
11	Set up the timesheet and expense classes for a subcontractor.	
12	Assign a seat license and provide module access to a subcontractor.	
13	Make timesheets available offline.	
14	Configure UDTs to allow manual entry.	
15	Configure your timesheet class to use the Time Clocking features.	
16	Configure the mobile session inactivity limit.	

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:

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 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 Deltek Time & Expense Help System 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."
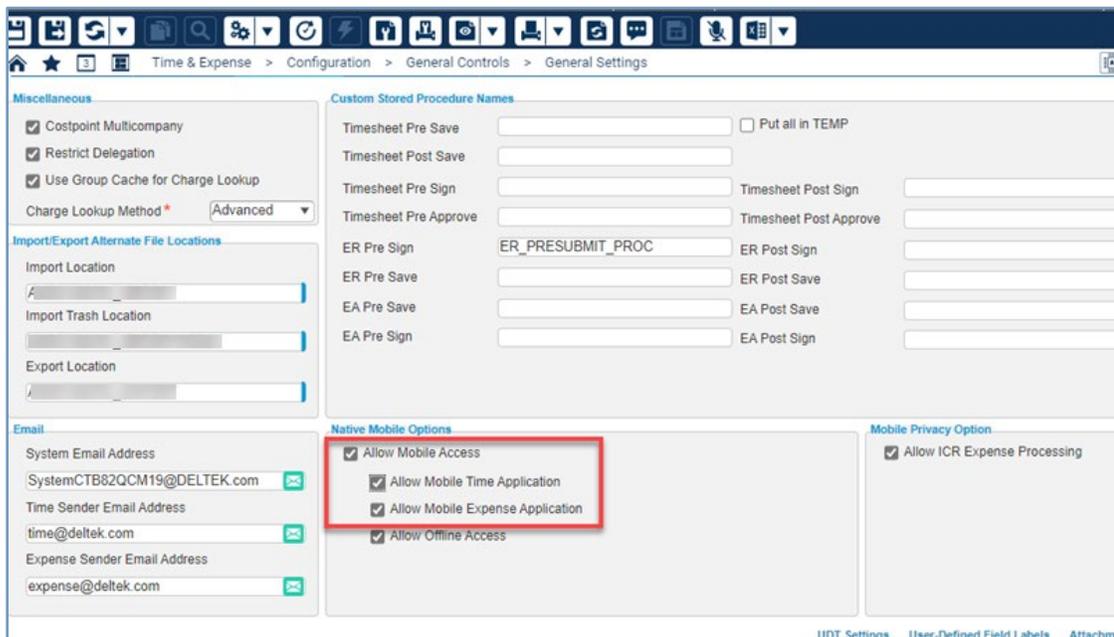
Step 2: Verify and Apply the Product License

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.

> **Attention:** For more information on product licensing, see the *Deltek Costpoint DB Wizard Utility Guide*.

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	Note
ADMDESKTOP	Manage MyDesktop	Full	
TMMTIMESHEET	Timesheet	Full	This application is required for entering timesheets.
EPMEXPRPT	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:
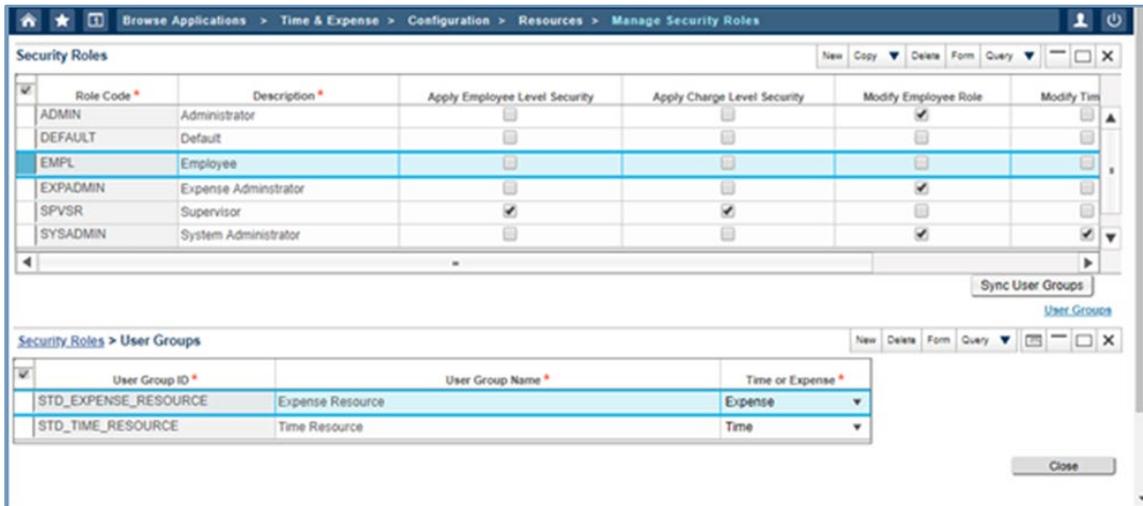
Note: On the Costpoint menu, click **Time & Expense » Configuration » Resources » Security Roles** to display the screen.

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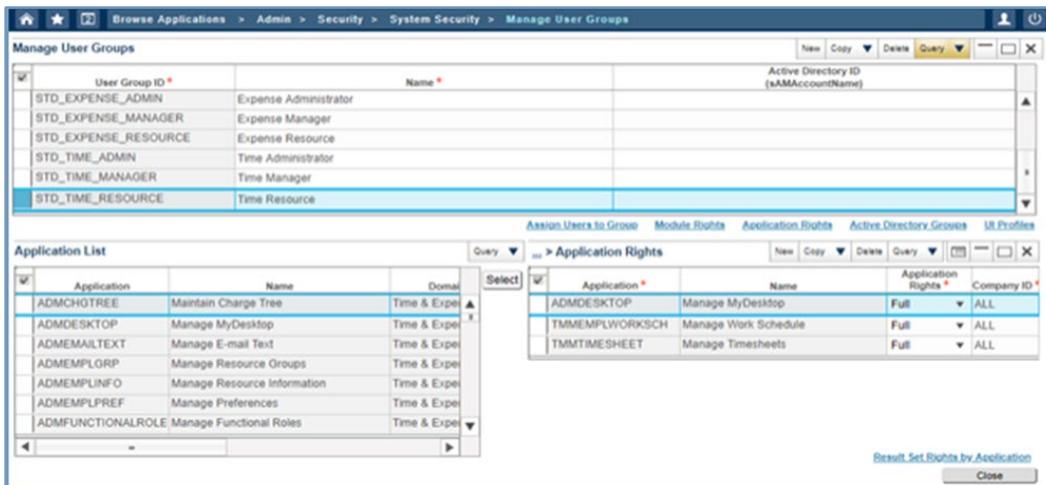
Note: On the Costpoint menu, click **Admin» Security » System Security » Manage User Groups** to display the screen.

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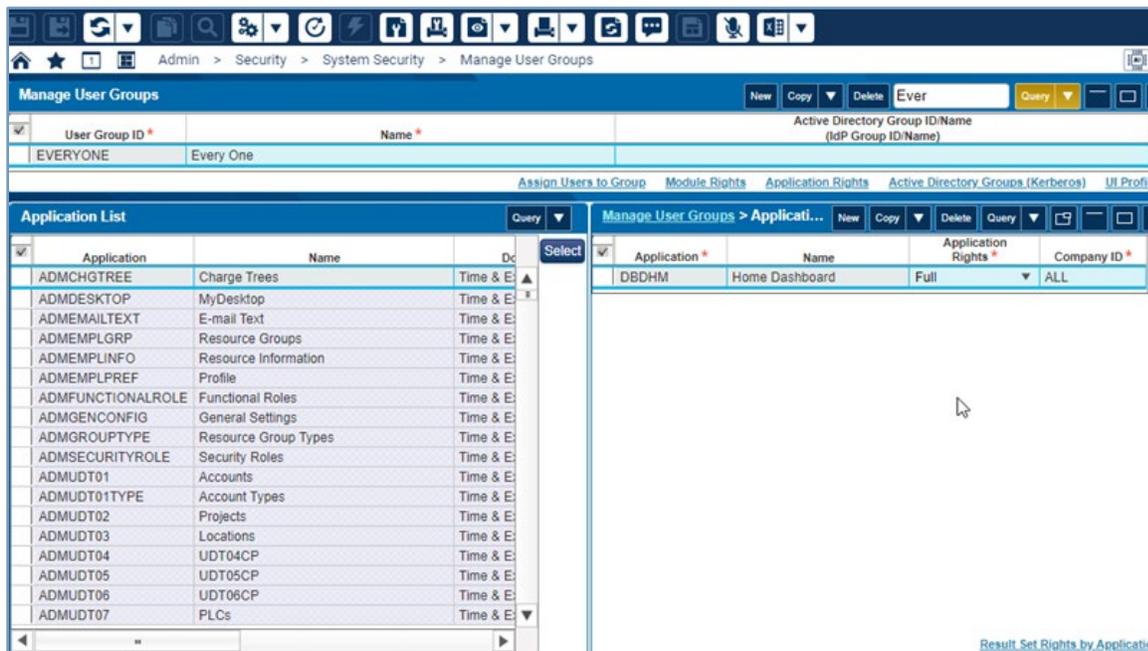
In this example, **EVERYONE** already gives FULL rights to the ADMDESKTOP application, but no rights are assigned to the SYMABOUT application. Thus, you need to grant rights for the SYMABOUT application.

Step 4: Configure 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**
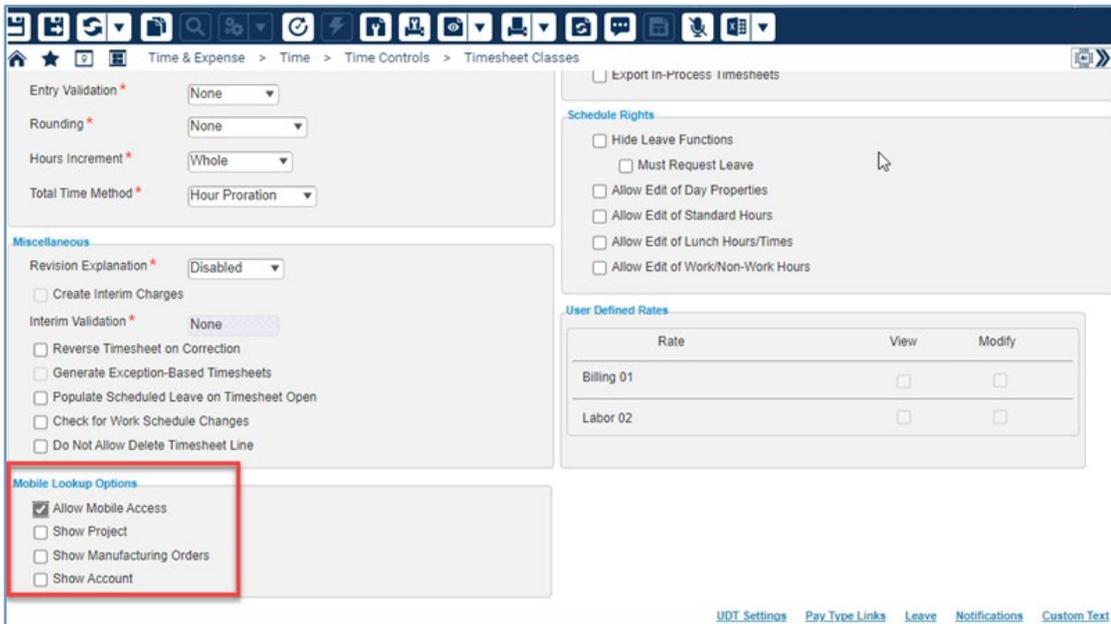
4. Click **Save**.

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**
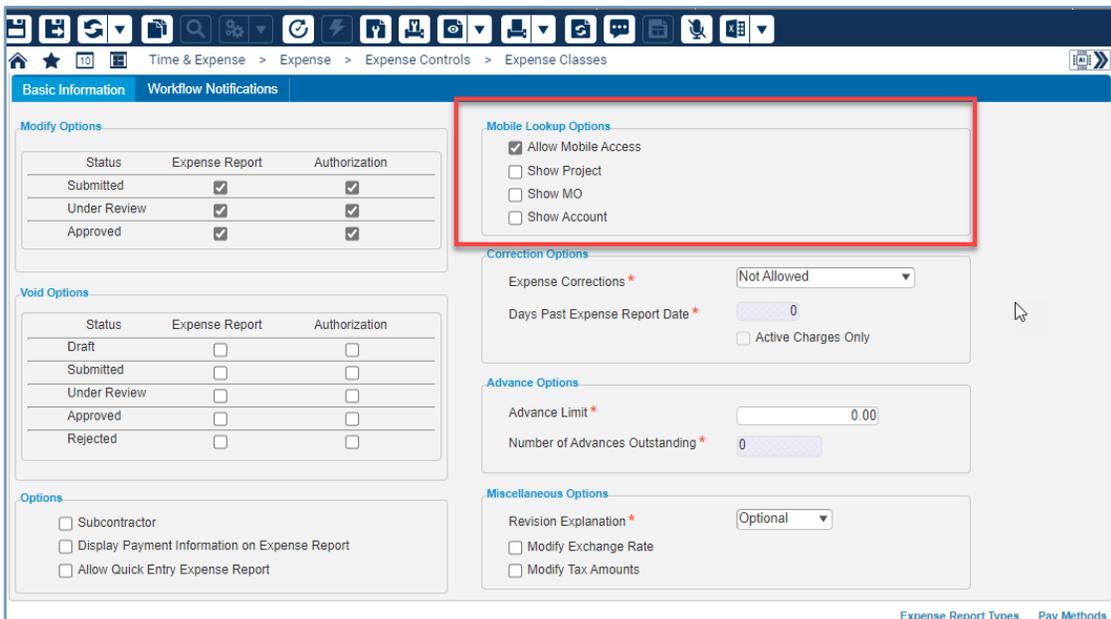
8. Click **Save**.

Step 5: Configure PIN Settings

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

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

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

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 setting 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).
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, this setting 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.

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/TimeandExpenseUserGuideAndroid/Overv
iew.html"
```

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

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.

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

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.

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

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.
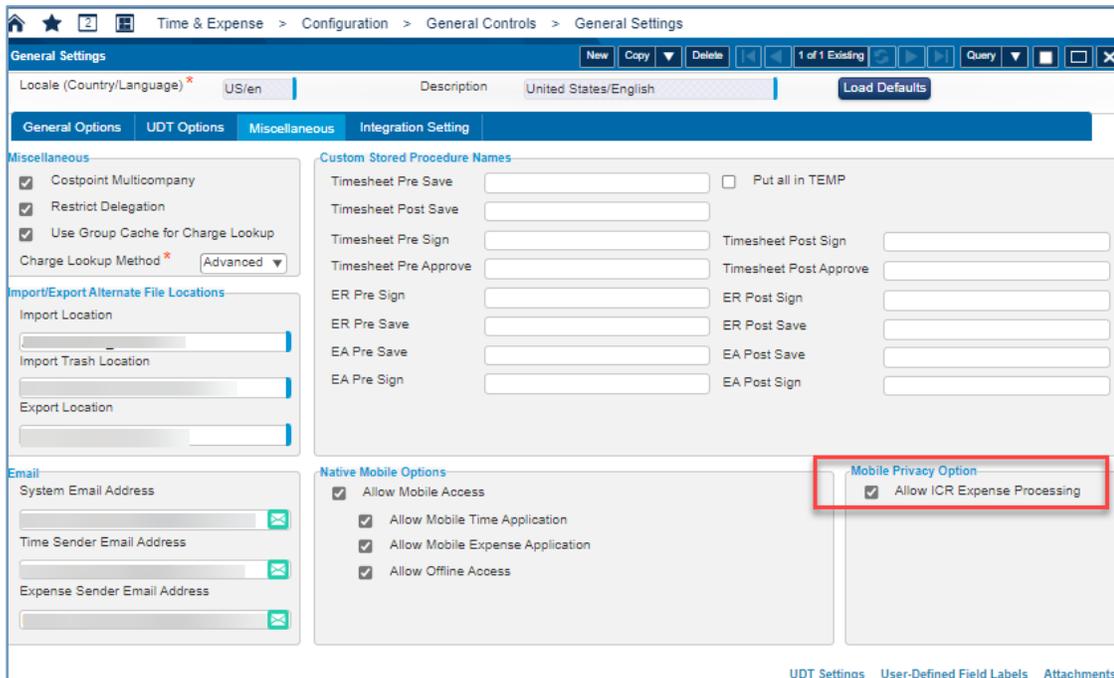
Step 9: Set Up the "MANUAL" Batch Expense Type

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** 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 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 10: 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 Deltek Time & Expense Help System:
> - "Tasks Subtask" under **Expense » Expense Controls » Expense Types**
> - "Expense Report Types Subtask" under **Expense » Expense Controls » Expense Classes**

Step 11: Set Up the Timesheet and Expense Classes for a Subcontractor

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

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.

> **Attention:** For more information, see "Allow Access to the Costpoint Mobile T&E Application" in this guide.
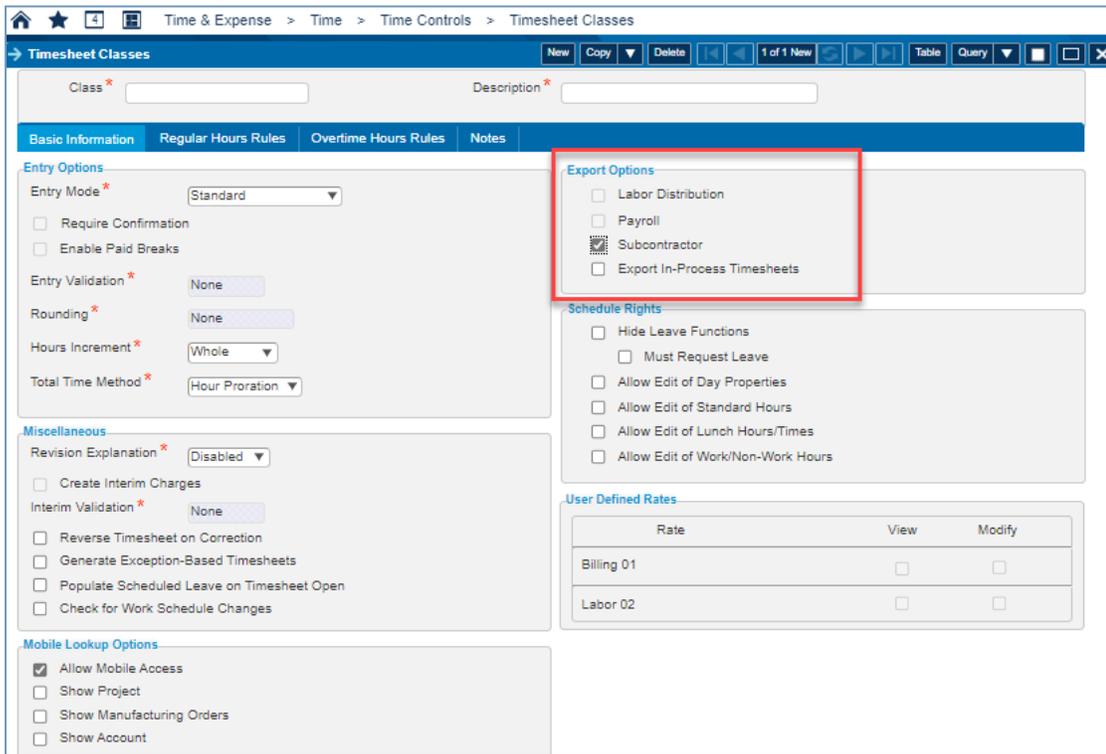
Use these procedures to indicate that the timesheet class or the expense class is for subcontractors.

> **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*.

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**.

> **Attention:** For more information on the Basic Information screen, see "Basic Information Tab" in the Deltek Time & Expense Help System 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**.

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

Step 12: 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**.
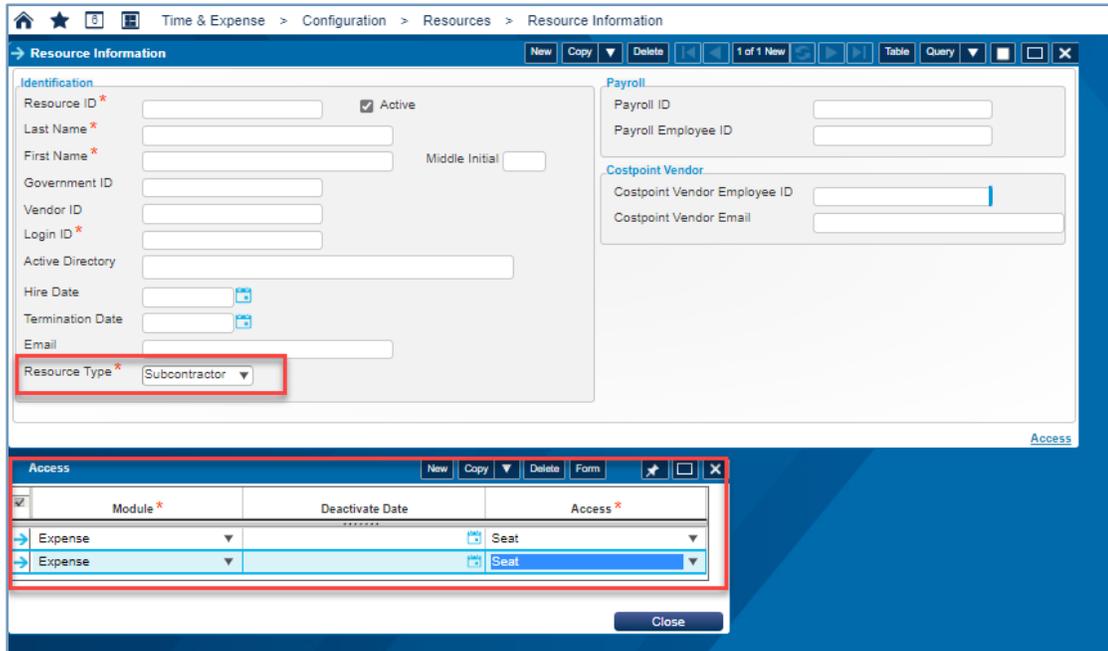
> **Attention:** For more information on the Resource Information screen, see "Resource Information" in the Deltek Time & Expense Help System under **Configuration » Resources**.

Step 13: 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.**
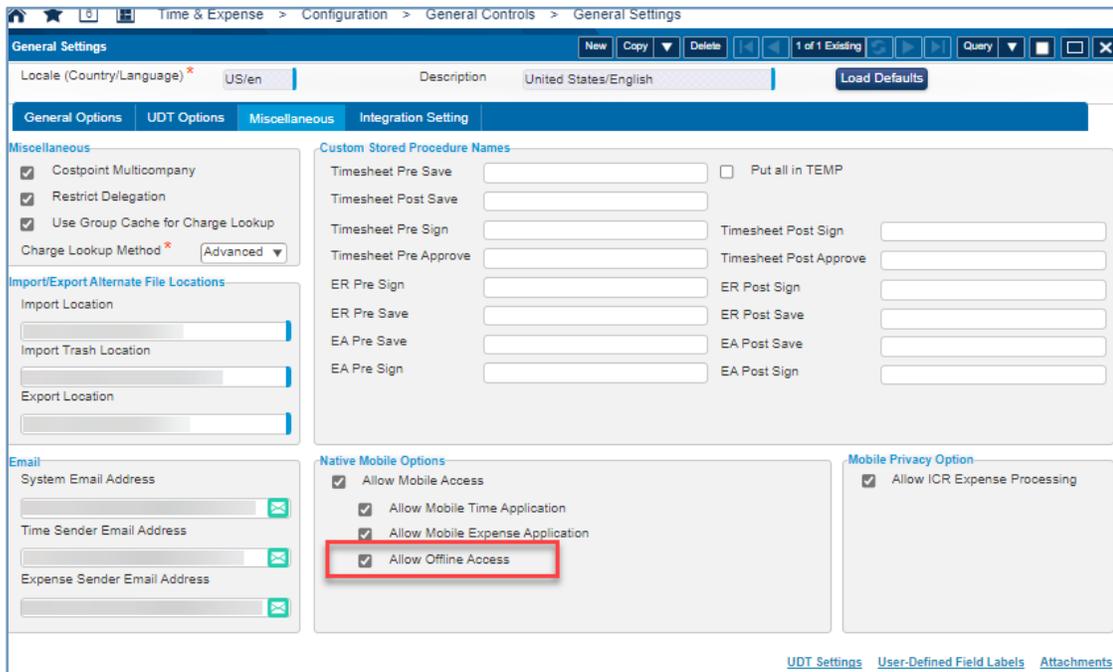
Step 14: Configure UDTs to Allow Manual Entry

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.

Step 15: 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.
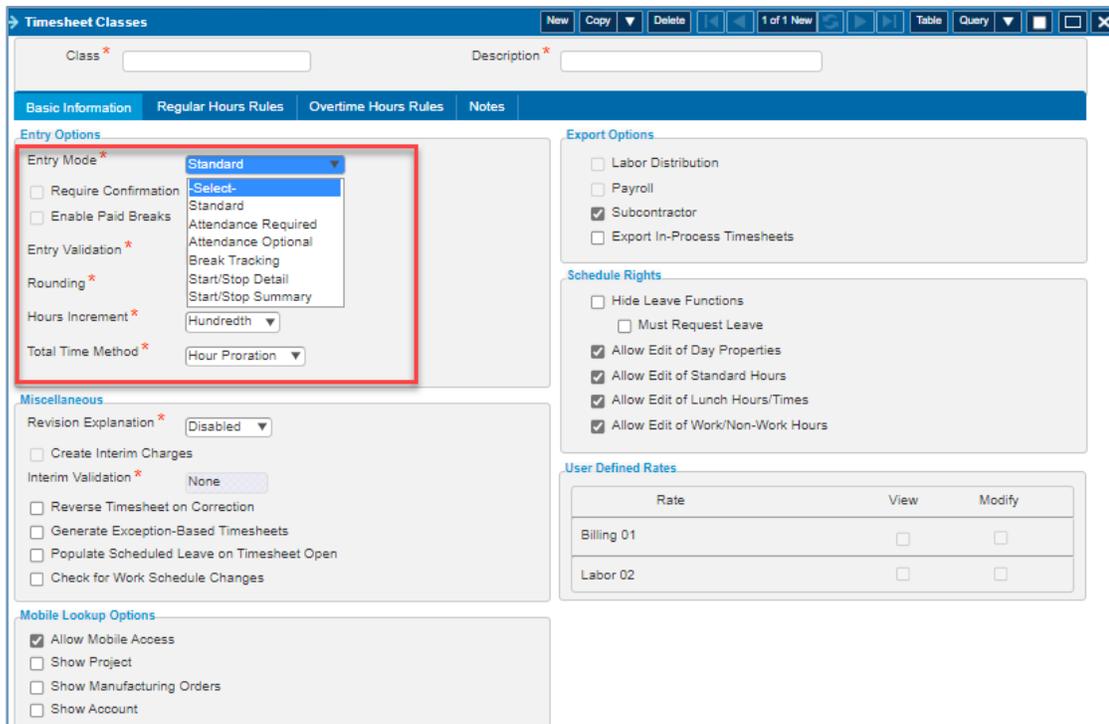
> **Attention:** For more information on the Basic Information Tab screen, see "Basic Information Tab" in the Deltek Time & Expense Help System under **Time » Time Controls » Timesheet Classes**.

Step 16: Configure the Mobile Session Inactivity Limit

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

To configure the inactivity limit in the Costpoint Mobile T&E session, locate **MOBILE_SESSION_TIMEOUT_MINS** in the **configuration.ini** file and edit its value.

> **Attention:** For more information on the **configuration.ini** file, see "The configuration.ini File" in this guide.

For example:

```
MOBILE_SESSION_TIMEOUT_MINS='15'
```

By default, the session inactivity limit is set to 15 minutes.

> **Note:** Deltek recommends setting this value to less than the Costpoint session inactivity limit.

If you set the value to less than 5 minutes, the session inactivity limit defaults to 5 minutes. Costpoint Mobile T&E displays a notification asking if you want to keep the session after 4 minutes of session inactivity. If you tap **Yes**, your session is reactivated, and the mobile session limit is renewed. If you tap **No** or if you do not respond after 1 minute, your session expires, and the application logs you out.

If you set the value to more than 5 minutes, Costpoint Mobile T&E displays a notification asking if you want to keep the session 2 minutes before the session expires. If you tap **Yes**, your session is reactivated, and the mobile session limit is renewed. If you tap **No** or if you do not respond after 2 minutes, your session expires, and the application logs you out.

Appendix A: The configuration.ini File

The **configuration.ini** file is a setting file utilized by Deltek to provide environment information to mobile applications.

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

Sample Configuration File for Costpoint Mobile T&E

Take note that the **configuration.ini** file contains three sections: **SERVER_DATA**, **ALLOWED_HOSTS,** and **PIN_SETTINGS**. It is important to remember to house these settings in their appropriate section when editing the file.

This table lists the configuration file settings and their descriptions.

> **Note:** When you add value to a setting, make sure to include the quotation marks.
>
> For example: URL="https:// johnsmithcorp.com/cpweb"

Section	Setting	Description	Default Value
SERVER_DATA	**URL**	This setting refers to the Costpoint Web URL.	"https:"<Costpoint server URL>/cpweb"
SERVER_DATA	**PRODUCT**	This setting refers to the Deltek product.	"Costpoint"
SERVER_DATA	**DEBUGGERFL**	If this setting is set to **true**, the debugging mode is enabled, and it writes potential error messages in the PHP log file.	"false"

Section	Setting	Description	Default Value
SERVER_DATA	**DYNAMICSCRIPT**	This setting is used for multi-tenant mobile application installations. If this setting is set to **true**, the other parameters in the configuration.ini file will be ignored, and the mobile application will use the values set in the **tenant.ini** files. In the **tenant .ini** files, this setting must be set to **false**.	"false"
SERVER_DATA	**TOUCHSERVERVER**	This setting represents the version of the Costpoint Mobile T&E Server. The value is set by the Costpoint Mobile T&E installer and should not be changed.	
SERVER_DATA	**REQUIREDEVICEPASSCODE**	This setting controls how Costpoint Mobile T&E handles users who do not have a passcode on their devices. If this setting is set to **true** and you do not have a passcode set on your device, you cannot use Costpoint Mobile T&E. If this setting is set to **false**, you are required to enter credentials during login and are not allowed to use a PIN.	"true"
SERVER_DATA	**ALLOW_BIOMETRICS**	This setting determines if users are allowed to use biometric authentication (fingerprint or face recognition) as an alternative to PIN. If this setting is set to **false**, biometric authentication is not allowed. If this setting is set to **true**, you can choose which authentication option to use during login (PIN, fingerprint, or face recognition).	"true"

Section	Setting	Description	Default Value
		Attention: For more information, see "Update the Biometric Authentication Setting" in this guide.	
SERVER_DATA	ANALYTICSKEY	This setting is not currently used.	""(blank)
SERVER_DATA	HELPDOCURL	This setting is used to set the source path of the User Guide that you see when tapping **Help** in Costpoint Mobile T&E. **Attention:** For more information on this setting, see "Update the Help URL" in this guide.	"https://help.deltek.com/product/Costpoint/Mobile/TimeandExpenseUserGuideAndroid/Overview.html"
SERVER_DATA	MOBILE_SESSION_TIMEOUT	This setting refers to the session inactivity limit for Costpoint Mobile T&E. **Attention:** For more information on this setting, see "Configure the Mobile Session Inactivity Limit" in this guide.	"15"
SERVER_DATA	SSL_CERT_FP1	This setting allows you to validate the certificate fingerprint of your Costpoint Mobile T&E connection. The Costpoint Mobile T&E installer sets this setting as an empty string. Deltek recommends updating this setting once you have confirmed that Costpoint Mobile T&E is working correctly.	
SERVER_DATA	SSL_CERT_FP2	By default, this setting is set to an empty string and does not validate the certificate until you enter the SHA-256 fingerprint. This setting is optional.	

Section	Setting	Description	Default Value
		Example value: "A1 1B 2C A1 1B 2C A1 1B 2C A1 1B 2C A1 1B 2C A1 A1 1B 2C A1 1B 2C A1 1B 2C A1 1B 2C A1 1B 2C A1"	
		Attention: For more information, see "Certificate Validation" in this guide.	
[ALLOWED_HOST]	**ALLOWEDHOST[]**	This setting allows you to add a list of host names that can perform requests on the Costpoint Mobile T&E Server. The host names usually use the same domain as the Costpoint Mobile T&E Server URL. The allowed hosts are entered in the [**ALLOWED_HOST**] section following this format: ALLOWEDHOST[] = "te.domain.com" **Example value:** ALLOWEDHOST[] = "host1234.mycompany.com" **Note:** Square brackets are required. **Note:** You may add multiple host names in this setting. By default, this setting is empty, and validation will only occur when you enter host names. Any host attempting to make requests but is not in the allowed hosts lists will be logged to the PHP error log. **Attention:** For more information, see "Adding Allowed Hosts" in this guide.	

Section	Setting	Description	Default Value
PIN_SETTINGS	**MIN_LENGTH**	This setting allows you to configure the PIN length from 4 digits (minimum length) up to 12 digits (maximum length). **Attention:** For more information on this setting, see "Configure PIN Settings" in this guide.	"6"
PIN_SETTINGS	**COMPLEXITY**	If this setting 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). **Attention:** For more information on this setting, see "Configure PIN Settings" in this guide.	"true"
PIN_SETTINGS	**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**. If you change your password, uninstall Costpoint Mobile T&E, tap **Forget Me on this Device**, or change user, the PIN expiration resets. **Attention:** For more information on this setting, see "Configure PIN Settings" in this guide.	"90"

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

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 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 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 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.

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 T&E 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.
Deltek Costpoint Mobile Time and Expense Release Notes	This document contains summaries of the new features and enhancements included for this release.

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