

# Costpoint Mobile Time and Expense FAQ

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# Costpoint Mobile Time and Expense FAQ

## Overview

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

**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.

## 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 **EPMEXP**OUTSTANDING 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*.

What are the scenarios when the Costpoint Mobile T&E application resets?

The Costpoint Mobile T&E application may reset under the following conditions:

- You exceed the limit of 3 incorrect PIN attempts (non-configurable for security reasons).
- You reach PIN expiration based on the `configuration.ini` file (defaults to 90 days; can be set to 0 for no expiration).
- You tap **Forget Me On This Device** on the Settings screen.
- You tap **Change User** on the PIN screen.
- You remove the passcode or encryption on your device, requiring you to log in manually each time.
- Your password expires or changes on the server, prompting you to enter your credentials again.
- You change or add a fingerprint.
- You change your device PIN and/or password.

**Note:** VPN or Internet issues do not trigger a reset.

## 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 or later. 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 (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*.

## 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 come to the foreground if other applications are open 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 do 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 are displayed. 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.