Deltek Costpoint

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Costpoint Mobile Time and Expense User Guide

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Costpoint Mobile Time and Expense User Guide

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.

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 guide contains detailed information and instructions on how to use various features of the application.

Note: The Costpoint Mobile T&E server must be installed and configured using the guidelines in the *Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

Guides and Videos

Costpoint Mobile T&E has several short "How to" videos and additional documents available per release.

We will continue to add to the video and learning aid collection and update this listing.

Type	Item
Videos	Manage Timesheet Entries Approve Timesheets Add Expense Reports Approve Expense Reports Capture Outstanding Expenses Managing Duplicate Outstanding Expense Configure Settings
FAQ Guide	Deltek Costpoint Mobile Time and Expense FAQ

Type	Item
Technical Installation and Configuration Guide	Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide
Release Notes	Deltek Costpoint Mobile Time and Expense Release Notes
Cumulative Update Release Notes	Deltek Costpoint Mobile Time and Expense Cumulative Update Release Notes
Cloud Administrator Guide	Deltek Costpoint Mobile Time and Expense Cloud Administrator Guide

Features Not Supported

There are Costpoint Time & Expense (Web) features that are not available in Costpoint Mobile T&E.

These features are as follows:

- **Interim Charges**: You cannot create interim charges in Costpoint Mobile T&E. However, you can charge interim charges already on 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) are referred to as Costpoint Time & Expense.

Mobile Device Requirements

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

- Apple iOS 18 or later
- iPadOS 18 or later
- Android 14 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.

Getting Started

To start using the Costpoint Mobile T&E application, take note of the following:

- Download the application from the appropriate App Store and install it.

  Attention: For more information, see Install Costpoint Mobile T&E.

- Your system administrator will provide the Costpoint T&E Server URL. Enter this URL in the **Server URL** field on the Login page along with your login credentials in the appropriate fields to connect to the application.

  Attention: For more information, see Log Into Costpoint Mobile T&E.

- If biometric authentication is supported on your device, you will be able to use it for future logins. Otherwise, you will use a PIN.

  Attention: For more information, see Biometric Authentication.

- If Costpoint Mobile T&E is configured for SAML identity provider authentication, you may login using your third-party authentication login credentials.

  Attention: For more information, see Log Into Costpoint T&E Using SAML Identity Provider Authentication.

Install Costpoint Mobile T&E

Download the application and follow the screen prompts to install Costpoint Mobile T&E.

To install Costpoint Mobile T&E:

1. In the appropriate App Store, search for the application (Costpoint Time and Expense).
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application and follow the screen prompts to install it.

   Attention: For more information, see Log Into Costpoint Mobile T&E.

Log Into Costpoint Mobile T&E

Depending on your setup, you may log into Costpoint Mobile T&E using your third-party authentication login credentials, biometric authentication (Face ID or fingerprint), or PIN credentials.

> **Note:** Costpoint Mobile T&E supports Lightweight Directory Access Protocol (LDAP) authentication.

To log into Costpoint Mobile T&E:

1. Tap **Costpoint**.
2. In the **Server URL** field, enter your organization's Costpoint Mobile T&E URL using the format **https://<server>/DeltekTouch/Costpoint/TE**, where **<server>** refers to the host name of your Costpoint Mobile T&E server.

   > **Note:** Including "https://" at the beginning of the URL is optional.

3. Tap **Connect**.
4. On the Log In screen, the **SAML/3rd Party Authentication** is set to **On**. Tap the **Username** and **System** fields to enter the corresponding values, and tap **Log In**.

   If Costpoint Mobile T&E is not yet configured to allow Single Sign-On (SSO), tap the **SAML/3rd Party Authentication** to set it to **Off**, enter the corresponding values in the fields, and tap **Log In**.

   > **Attention:** For more information, see Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication.

5. To review and accept the terms and use of service, tap the **Terms and Use of Service** button.
6. To continue, tap the **I accept these terms** button.
7. On the Local Storage/Cookies Policy screen, tap your preferred option for storing local data and managing cookies.

   > **Note:** The buttons on this screen vary depending on your region. For more information about local storage and cookie management, see Managing Local Storage and Cookies.

8. Tap to choose between using PIN or biometric authentication.

   You can change the setting at any time on the Settings screen.

   - If you choose to log in using biometric authentication, the application prompts you to allow access to your Face ID or fingerprint.
   - If you choose to cancel, Costpoint Mobile T&E displays the PIN screen. Enter a PIN code, which you will use on your succeeding logins.

     > **Attention:** For more information, see Create Security PIN.

     Costpoint Mobile T&E remembers your user ID and selected database (and domain, if Windows Authentication is used) on your next login. To log in using a different user ID and database, tap **Change User / Reset PIN**. All your user settings and favorites will be lost

9. If Two-Factor Authentication (2FA) is enabled, the One-Time Passcode screen displays. Enter your credentials.

   > **Attention:** For more information, see Biometric Authentication and Two-Factor Authentication (2FA) and

One-Time Passcode Screen.

If SAML Identity Provider Authentication is enabled, enter your login credentials.

Attention: For more information, see Log Into Costpoint Mobile T&E using SAML Identity Provider Authentication and Biometric Authentication and SAML Identity Provider Authentication.

Log Into Costpoint Mobile T&E Using SAML Identity Provider Authentication

If Costpoint Mobile T&E is configured for SAML identity provider authentication, you may login using your third-party authentication login credentials.

To log into Costpoint Mobile T&E:

1. On the Costpoint Mobile T&E Login screen, tap **SAML/3rd Party Authentication** to **On**.
2. Tap the **Username** and **System** fields to enter corresponding values.
3. Tap **Login**.

   Costpoint Mobile T&E redirects you to the SAML Service Provider (ADFS, Azure, Okta, or Ping) Login page where you provide your credentials such as user name, passwords, biometrics, certificates, and so on.

   The SAML provider verifies your identity and issues SAML authentication token. You are then directed back to Costpoint Mobile T&E, which verifies your SAML authentication token. If your token is valid, you are allowed to continue with your login and the PIN screen displays.

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

Managing Local Storage and Cookies

Costpoint Mobile T&E provides preferences for managing local storage and cookies based on your region.

The application supports two types of preferences related to local storage and cookies.

- The **Required Local Storage/Cookie** preference is essential for the application’s core functionality—such as secure login—and is always enabled.
- The **Functional Settings Local Storage** preference allows the application to save your application settings. Depending on your region and choices, you can enable or disable this preference.
  When you enable this preference, the application remembers your settings for future sessions. When you disable it, the application forgets your settings and uses default values for each session.

You can manage the storage preferences through the Local Storage/Cookies Policy screen, which can be accessed in the following areas of the application:

- The **Open Local Storage/Cookies Settings** button on the Local Storage/Cookies Policy screen during login: This is where you initially manage your storage and cookie preferences when you log into the application for the first time.
- The **Local Storage/Cookies Settings** field on the Settings screen: This is where you can update your storage and cookie preferences at any time.

The table summarizes the status of affected areas of the application based on region specific behavior of local storage and cookie settings during login.

Region	Buttons Display on the Local Storage/Cookies Policy Screen During Login	Functional Settings Local Storage Status	Local Storage/Cookies Settings Field Value on the Settings Screen	Can Be Updated After Login?
EEA, UK, and California	Accept All	Enabled	Accept All	Yes, on the Settings screen
	Accept Only Required	Disabled	Only Required	Yes, on the Settings screen
Other Regions	I Understand	Enabled	Accept All	Yes, on the Settings screen

Create Security PIN

For initial login, Costpoint Mobile T&E requires you to create a PIN, which you will use on your next login, instead of entering your user name and password.

Note:

- By default, PIN length is 6 digits, but you can configure it from 4 digits (minimum length) up to 12 digits (maximum length).
- PIN is not required if you are using your device's biometric authentication to log into the application.

Attention: For more information on how to configure PIN settings, see the "Configure PIN Settings" section of the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

To create the security PIN:

1. On the Login screen, enter a PIN, and tap .

   The minimum number of digits is displayed.

2. Re-enter the PIN to confirm, and tap .

   If you enter an incorrect PIN three times, you will be prompted to log in using your user name and password.

One-Time Passcode Screen

If your Costpoint login is configured for two-factor authentication and Costpoint PIN, the One-Time Passcode screen displays before the PIN screen.

Two-factor authentication (2FA) is an extra layer of security that verifies the identification of users using a combination of two different components, such as the user name/password component and the one-time passcode component.

- One-time Passcode: The one-time, 6-digit random number passcode is either generated by Costpoint and securely emailed to a user's email address or generated separately by a user on a mobile device through one of the available 2FA mobile applications, such as Duo Security or Google Authenticator.
- Permanent PIN: In addition to a one-time passcode, you may be asked to verify their identity through a personal four-digit PIN. This PIN is stored in User Preferences and may be required on the Login page.

Attention: For information on how to set up two-factor authentication using email or mobile application and how to configure the Costpoint PIN, see the Two-Factor Authentication section in the *Deltek Costpoint Security Guide* and "Authentication Tab" in the Costpoint Online Help System under **Administration > Security > System Security > Manage Users > Tabs**.

Change User

Use the Change User feature to log into the application using a different username.

To change a user:

1. Tap , and tap .
2. On the PIN screen, tap **Change User**.
3. Tap the **Username, Password**, and **System** fields to enter corresponding values.
4. Tap **Log In**.
5. Enter a PIN, and tap .

   By default, the PIN is 6 digits.

Log Out of Costpoint Mobile T&E

Tapping , and then tapping **Log Out** logs you out of Costpoint Mobile T&E. On your next login, regardless of the timeout period, the application prompts you for your PIN or biometric data.

If you are using a SAML or third-party authentication provider, Costpoint Mobile T&E follows the following behavior:

- When you log into Costpoint Mobile T&E on an iOS device using a SAML or third-party authentication provider and then log out, the PIN screen or the Biometric screen displays on your next login.
- When you log into Costpoint Mobile T&E on an iOS device using a SAML or third-party authentication provider and then you tap **Forget Me On This Device** or close the application, the SAML/third-party authentication provider login page displays after the Costpoint Mobile T&E Login screen on your next login, requiring you to enter your SAML or third-party authentication login credentials.

  > **Note:** You should not force-quit applications on an iOS device. Apple iOS manages the applications and removes them from memory as needed. When you force quit an application, it is removed completely from memory, including any active login token you may have with your SAML or third-party authentication provider. Deltek recommends that you logout from the application (tap **Logout**) when you are done using it, and switch to another application.

- When you log into Costpoint Mobile T&E on an Android device using a SAML or third-party authentication provider and then log out, the PIN screen or the Biometric screen displays on your next login.

  > **Note:** To allow the application to store your third-party authentication login credentials on an Android device, make sure that the Reply URL points to the new server location. Otherwise, the SAML or third-party authentication provider login page displays after the Costpoint Mobile T&E Login screen on your next login, requiring you to enter your SAML or third-party authentication login credentials.

  > **Attention:** For more information on the Reply URL, see "User Authentication" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

- When you log into Costpoint Mobile T&E on an Android device using a SAML or third-party authentication provider, and then you tap **Forget Me On This Device** or close the application, the SAML or third-party authentication provider login page displays after the Costpoint Mobile T&E Login screen on your next login, requiring you to enter your SAML or third-party authentication login credentials.

- When you reach the mobile session inactivity limit, which is 15 minutes, by default, Costpoint Mobile T&E displays a notification about it so you can choose to keep your session active instead of being logged out.

> **Attention:** For more information on how to configure the mobile session inactivity limit, see "Configure the Mobile Session Inactivity Limit" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

Biometric Authentication

You can log in to 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.

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 the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

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

  > Note: 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).
- If you are using Two-Factor Authentication (2FA) with Microsoft Authenticator and Face ID on iOS devices, you may get 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.

If you use Costpoint Mobile T&E on a device that supports biometric authentication, the application displays a message that biometric authentication is supported and that you can enable it on the Settings screen.

Biometric authentication identifies you using your unique body measurements or characteristics, such as your fingerprint, or your face. Use the fingerprint sensor or face recognition function of your device to set up the biometric authentication. The next time you log into the application, Costpoint Mobile T&E prompts you to use your fingerprint or face. If biometric authentication fails, Costpoint Mobile T&E prompts you to choose between PIN or biometric login during subsequent logins (just once).

Note: PIN is not required if you are using your device's biometric authentication to log into the application.

Biometric Authentication Behavior on an Android Device

When you log out from an Android device, Costpoint Mobile T&E closes out.

When you launch the application again, Costpoint Mobile T&E prompts you to login using your fingerprint. If you tap **Cancel** on the Biometric Login screen, the Login screen displays and asks you enter to your login credentials. If authentication is successful, you are logged into the application without using biometric authentication. The application prompts you to use fingerprint authentication on your next login. When you tap **Cancel** on the Biometric Login screen and then completely close out Costpoint Mobile T&E, the application prompts you to select between using biometric authentication or PIN on your next login.

Biometric Authentication Behavior on an iOS Device

When you log out from an iOS device and then launch Costpoint Mobile T&E again, the application displays the "Login using Face ID (or Touch ID)" screen.

When you completely closes out application, Costpoint Mobile T&E displays the Biometric Login screen.

Biometric Authentication and Two-Factor Authentication (2FA)

You can use biometric authentication with 2FA.

If both enabled, Costpoint Mobile T&E will validate you using the biometric authentication, followed by your One-Time Passcode login credentials.

Biometric Authentication and SAML Identity Provider Authentication

You can use biometric authentication with SAML Identity Provider Authentication.

If both enabled, Costpoint Mobile T&E validates you using your biometric, followed by your SAML/third-party authentication login credentials, depending on the status of your login token.

If your session times out and the login token is still active and valid, Costpoint Mobile T&E prompts you to log in again using your biometric. However, if your session times out and the login token already expires, Costpoint Mobile T&E displays the Biometric login page, followed by the SAML/third-party authentication provider login page instead, requiring you to enter your SAML/third-party authentication login credentials.

Switching Between Screens in Costpoint Mobile T&E

Costpoint Mobile T&E prompts you to save the timesheet or the expense report when there is an unsaved timesheet or expense report, and you perform any of the following actions:

- Navigate to a new timesheet or a new expense report by tapping .
- Navigate to a new timesheet by tapping  when you are not in the timesheet with today's date.
- Tap , and tap any other menu item.

Switching Between Applications on the Device

If you switch between applications on the device, Costpoint Mobile T&E keeps any unsaved changes in the memory as long as the application is still active on your device.

If you close the application from the task list or if you turn off your device, changes will be lost.

> **Note:** Changes are only saved in memory with the packaged application and not when accessed through the device browser via a URL.

iOS Lockdown Mode

Lockdown Mode is an optional security feature available on iOS devices. It is designed to protect users against highly sophisticated cyberattacks.

By default, Lockdown Mode is disabled.

Costpoint Mobile T&E and iOS Lockdown Mode

By default, Costpoint Mobile T&E does not function on iOS devices when Lockdown Mode is enabled. If Lockdown Mode is enabled on your device, a warning message will be displayed when you launch the application. However, you can exclude Costpoint Mobile T&E and other trusted application from Lockdown Mode through your iOS device settings.

> **Attention:** For more information, see Exclude Costpoint from Lockdown Mode.

Exclude Costpoint from Lockdown Mode

Follow this procedure to allow Costpoint Mobile T&E to function normally while keeping the rest of Lockdown Mode active.

To exclude Costpoint from Lockdown mode:

1. On your iOS device, tap **Settings**.
2. Tap **Privacy & Security** > **Lockdown Mode**.
3. Tap **Configure Web Browsing**.
4. Toggle **Costpoint** to off.

Screen Display

The Costpoint Mobile T&E user interface has different menus, which you access by tapping .

When you access Costpoint Mobile T&E on a mobile phone running on any supported operating system, the Landscape mode is turned off, and your mobile phone screen is locked to Portrait mode. However, if you access the application on a tablet computer, you can switch your screen orientation.

> **Note:** When you use Costpoint Mobile T&E on a mobile phone running on iOS, you can rotate the screen Landscape mode if you are using the date picker on the Timesheet or Expense Reports screen. This is not an issue with Costpoint Mobile T&E.

Screenshots and Screen Recording

Screenshots and screen recordings are hidden and disabled in Costpoint Mobile T&E on both Android and iOS devices.

Android

Screenshots and screen recordings are disabled by default. Behavior may vary depending on the device.

- **Pixel devices**: Taking a screenshot results in a black image.
- **Samsung devices**: Taking a screenshot or recording the screen displays the message **This app doesn't allow screenshots** or **Can't record screen due to security policy**.

To enable screenshots and screen recording for 15 minutes during your current application session, tap the **Screenshots/Recording Temporarily Allowed** option on the Settings screen.

iOS

Screenshots are hidden when switching applications, but you can still take screenshots and record their screen.

App Switching

When you are switching applications in Costpoint Mobile T&E, screenshots are hidden on both Android and iOS devices. A placeholder screen—gray on Android and the launch screen with a Timesheet icon on iOS—is displayed to prevent exposure of sensitive information. On some older iOS devices, a solid color may display instead, while certain Android devices may display the logo on a white screen in specific cases.

Contents of the Screen Display

Use the fields and options to manage and configure the different Costpoint Mobile T&E screens.

Menu Items

Field	Description
Time Clock	Tap **Time Clock** to display the Time Clock screen, which allows you to record start/stop times without manual entry.

Timesheet	Tap **Timesheet** to display the Timesheet screen, which allows you to perform several tasks for your timesheet.
	The Timesheet screen contains the following icons:
	▪ : Tap this icon to display the calendar.
	▪ **Time Clock**: This icon is available only if your timesheet class in Costpoint Time & Expense is configured for the Time In-Out feature or the Start-Stop Time feature (**Break Tracking**). Tap this icon to display the Time In/Out screen or the Start-Stop Time screen.
	▪ **Sign**: Tap this icon to sign a timesheet.
	▪ **Save**: Tap this icon to save a timesheet.
	▪ **Add**: Tap this icon to display the Add Charge screen.
	▪ : Tap this icon to display the following options:
	  ▪ View Summary
	  ▪ Timesheet Search

Field	Description
	▪ Request Correction ▪ Correct ▪ Work Schedule ▪ Manage Favorites ▪ Help
Capture Receipt	Tap **Capture Receipt** to access the Capture Receipt screen, which allows you to either take an image using your device's camera or select an image from the archive or camera gallery, and easily attach the image to an expense report.
Expense Reports	Tap **Expense Reports** to display the Expense Reports screen, which allows you to manage expense reports and outstanding expenses depending on your role. The Expense Reports screen contains the following tabs: ▪ Expense Reports ▪ Outstanding Expenses The Expense Reports screen contains the following icons: ▪ **Filter**: Tap this icon to filter the expense reports displayed on the Expense Reports tab by status. ▪ **Add**: Tap this icon to display the New Expense Report screen. The Outstanding Expenses screen contains the following icon: ▪ **Hide**: Tap this icon to hide an outstanding expense.
Quick Entry Expense	Tap **Quick Entry Expense** to display the Quick Entry Expense screen, which allows you to create a simplified expense report. The Quick Entry Expense screen contains the following icons: ▪ **Filter**: Tap this icon to filter the expense reports displayed on the Quick Entry Expense screen by status.

Field	Description
	▪ **Add**: Tap this icon to display the New Quick Entry screen.
Self Service	Tap **Self Service** to display the Self Service screen, which allows you to view your pay and expense payment records. The Self Service screen contains the following tabs: ▪ Payroll ▪ Expense Payment
Leave	Tap **Leave** to display the Leave screen, which shows your leave balances by type. The Leave screen contains the following icons: ▪ **Requests**: Tap this icon to display the Leave Requests screen and view the leave requests you submitted. ▪ **Add**: Tap this icon to display the Request Leave screen and submit a new leave request.
Tasks	Tap **Tasks** to display the Tasks/Dashboard screen, which shows the tasks you need to perform.
Settings	Tap **Settings** to display the Settings screen, which helps you configure the Costpoint Mobile T&E settings.
Help	Tap **Help** to display the user guide for this application.
Logout	Tap **Logout** to log out of the application.

Field Indicators

Several indicators mark the fields on the screen when you add, edit, or configure settings.

Field	Description
Required	You must enter a value in this field in order to continue a task. This field is marked with an asterisk (*) and labeled *Required.*
Editable	This field allows you to enter or select a value. This field is marked with and allows you to enter or select a value.
Read Only	Fields without a forward arrow are defined by your company or set by using pre-saved favorites and are non-editable.

Error and Warning Indicators

If there is a problem when saving a timesheet or expense report, Costpoint Mobile T&E displays a corresponding error or warning indicator to help you easily identify the data fields that you need to address.

Icon	Description
	This icon indicates an error in the timesheet or expense report line. A timesheet or expense report with an error cannot be saved until the error is resolved. Tap to return to the timesheet or expense report and correct it before submitting.
	This icon indicates a warning in the timesheet or expense report line. You can either tap **Continue** to submit the timesheet or expense report, or tap to return to the timesheet or expense report and make changes.

Timesheet

The Timesheet screen allows you to view and change timesheet periods and create, revise, and submit timesheets.

If you are a new user, you may want to go to Costpoint Time & Expense and load the previous timesheets from Favorites. This way, you can start off with some projects in your first timesheet that you know are valid and you can use on mobile. This makes your first time using Costpoint Mobile T&E more convenient.

The Timesheet screen is available only if the **Allow Mobile Time Application** option is selected in Costpoint Time & Expense.

Note: If your timesheet class is configured for Time Clock entry and you tap **Timesheet** on the Costpoint Mobile T&E menu, the Timesheet screen displays the message **Please use Time Clock to enter your time.**

Timesheets are read-only.

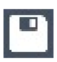
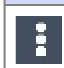
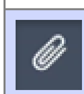
Attention: For more information on how to configure access to the Mobile Time application, see "Allow Access to the Costpoint Mobile T&E Application" in the *Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

Timesheet Screen Icons

The table below provides information on the icons available on the Timesheet screen.

Note: If you are logged into Costpoint Mobile T&E with a proxy user role, the **Resource** field displays on the Timesheet screen, just above the date carousel.

Attention: For more information on proxy users, see Mobile Time Access for Proxy Users.

Icon	Description
	Tap this icon to display the calendar.
 Sign	Tap this icon to sign a timesheet.
 Save	Tap this icon to save a timesheet.
 Add	Tap this icon to display the Add Charge screen.
	Tap this icon to display the following: ▪ View Summary ▪ Timesheet Search ▪ Request Correction ▪ Correct ▪ Work Schedule ▪ Advanced Charge Search ▪ Manage Favorites ▪ **Help**: Tap this option to view the help topic for this screen.
	Tap this icon to display the Overall Attachments screen, where you can upload attachments required for your timesheet.

Icon	Description
	This icon is available only if the **Timesheet Overall Attachments** field, located on the Miscellaneous tab of the Time Settings screen in Costpoint Time & Expense, is set to either **Optional** or **Required**. ▪ A white paperclip icon indicates that no attachment is present or an attachment is missing. ▪ A green icon indicates that an attachment has been added. If **Timesheet Overall Attachments** is set to **Required** and you attempt to sign a timesheet without an attachment, Costpoint Mobile T&E will display the "Attachment is required" message. **Attention:** For more information, see "Overall Attachments" in the Costpoint Online Help under **Time & Expense** > **Time** > **Time Controls** > **Time Settings** > **Miscellaneous Tab**. **Important:** Overall attachments for proxy users are read-only.
Time Clock	Tap this icon to display the Time In/Out screen. This icon is available only if your company uses the Time In/Out feature.
Meal	Tap this icon to display the Start/Stop Time screen. This icon is available only if your company uses the Start/Stop Time feature.
Break	Tap this icon to display the Start/Stop Time screen. This icon is available only if your company uses the Start/Stop Time feature.

The Timesheet screen displays the timesheet up to the current date, even if you have a future timesheet saved.

Depending on your company setup, the Timesheet screen also displays the following details:

- **Total**: This is the combined regular and overtime hours for the timesheet period.
- **Regular**: This is the total regular hours for the timesheet period.
- **Overtime**: This is the total overtime hours for the timesheet period.

> **Note:** The Overtime hours display only if the overtime calculation associated with the timesheet class in Costpoint Time & Expense is configured.

- **Minimum**: This is the total minimum hours for the timesheet period.

> **Note:** The Minimum hours display only if the **Show Minimum Hours on Timesheet** option associated with the timesheet class in Costpoint Time & Expense is selected.

> **Attention:** For more information on how to configure your timesheet class, see the "Timesheet Classes" topics in the Costpoint Online Help under **Time** > **Time Controls**.

Mobile Time Access for Subcontractors

For subcontractors, it is important to understand the requirements for accessing Costpoint Mobile T&E.

These requirements are as follows:

- You must have access to the Mobile Time application.
- Your timesheet class must indicate that it is for subcontractors.
- Your resource type must be set to subcontractor and with access to the Time module.

> **Attention:** For more information on how to configure access to the Mobile Time application for subcontractors, see "Set up the Timesheet and Expense Classes for a Subcontractor" and "Assign a Seat License and Provide Module Access to a Subcontractor" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

Mobile Time Access for Proxy Users

A proxy user is a supervisor or a backup supervisor who has proxy rights to create, edit, and sign timesheets on behalf of other users.

> **Note:** Proxy permission is set by your system administrator for your Timesheet Group Class and functional role rights through Costpoint Time & Expense.

> **Note:** This feature is available if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

> **Attention:** For more information, see "Manage/Approve Timesheets" in the Costpoint Online Help under **Time & Expense** > **Time** > **Timesheets**.

If you are logged into Costpoint Mobile T&E with a proxy user role, the **Resource** field displays on the Timesheet screen. Tapping displays the Resource screen, which displays all users for whom you are designated as a proxy. As a proxy user, you can choose the user on whose behalf you are acting. After the Timesheet screen refreshes, the timesheet information of the selected user based on the timesheet period becomes available to you. You can create, edit, and sign timesheets as you normally would if you were managing your own timesheets, if the role permits.

> **Attention:** For more information, see Timesheets Tasks.

Tapping refreshes the Timesheet screen with your own timesheet.

> **Important:** Overall attachments for proxy users are read-only.

Manage Timesheets as a Proxy User

As a proxy user, you can create, edit, and sign timesheets on behalf of other users, if the role permits.

> **Note:** Proxy permission is set by your system administrator for your Timesheet Group Class and functional role rights through Costpoint Time & Expense.

> **Attention:** For more information on proxy users, see Mobile Time for Access for Proxy Users.

To manage timesheets as a proxy user:

1. On the Timesheet screen, tap next to the **Resource** field.
2. On the Resource screen, perform one of the following actions:
   - Scroll through the list and tap a user.
   - Tap **Search Name** to search for user by name, tap , and tap a user from the list.
   - Tap **Search ID** to search for user by ID, tap , and tap a user from the list.

   The timesheet information of the selected user based on the timesheet period is displayed on the Timesheet screen.
3. Perform the required timesheet task (for example, add, edit, or sign a timesheet.)

   > **Attention:** For more information, see Timesheets Tasks.
4. Tap to refresh the Timesheet screen with your own timesheet.

Add Charge/Edit Charge Screen

The Add Charge screen displays when you tap **Add** on the Timesheet screen.

The Edit Charge screen displays when you tap an existing charge on the timesheet.

Use the Add Charge screen or the Edit Charge screen to perform detailed timesheet entry.

Note: The charge line information such as charge status and dates is displayed for a timesheet charge on the Edit Charge screen when you expand the timesheet charge name.

Field	Description
Date	This field displays the selected timesheet date.
Hours	Tap this field to enter the hour values of your time entry using the onscreen keypad or the time picker.
Hour Comments	Tap this field to enter your comments regarding the hours you entered.
Charge Comments	Tap this field to enter your comments regarding the charge. **Note:** When you add a comment to a favorite charge on the Manage Favorites screen and you add that favorite charge to your timesheet, the same comment also displays in the comment field of the timesheet line.
Favorite	Tap **On/Off** to set it to **On** to automatically add the selected charge to **Favorites**. **Attention:** For more information, see Favorite and Autopopulate Fields.
Autopopulate	Tap **On/Off** to set it to **On** to automatically add the selected charge to your timesheets. **Attention:** For more information, see Favorite and Autopopulate Fields.
Copy Charge	Tap this button to copy a timesheet charge.
Delete Charge	Tap this button to delete a timesheet charge.

Add Charge Screen or Edit Charge Screen for Subcontractors

If you are logged in as a subcontractor, the Add Charge or Edit Charge screen also displays the following fields.

Field	Description
Description	This field displays the work assignment description.
Work Assignment ID	This field displays the work assignment ID associated with the timesheet charge.
PO ID	This field displays the PO ID associated with the timesheet.
PO Line	This field displays the line number on the order.

UDT Fields

The rest of the fields on the Add Charge/Edit Charge screen are user-defined table fields. Their labels may change depending on your company's preferences.

If a UDT field is configured for manual entry in Costpoint Time & Expense and you tap it, the **Manual Entry** field displays on the UDT screen. Use the **Manual Entry** field to assign the appropriate value for the UDT field by entering or searching for the ID or name, and then tapping **Done**. When you tap **Done**, the Edit Charge screen displays, and the value you entered is populated in the UDT field. To clear the entry, click the circle icon in the field.

Attention: For more information on how to allow manual entry for UDTs, see "Configure UDTs to Allow Manual Entry" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

For more information on UDTs used in Costpoint and how to configure them, see "UDT Names" and "UDT Options Subtask" in the Costpoint Online Help under **Time & Expense** > **Time** > **Time Controls** > **Time Settings**.

Add/Edit Charge Screen Tasks

These are the procedures you can perform on the Add/Edit Charge screen.

Add a Charge to Your Timesheet

Add a charge to your timesheet by selecting a charge from your favorite charges or by searching among all available charges.

To add a charge to your timesheet:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap **Add**.
3. On the Charge Lookup screen, perform any of the following actions:

- Tap **Favorites** to select a charge from your favorite charges.

  > **Note:** This tab is hidden if favorites are not set up.

- Tap **Lookup Charges** to search among all available charges.
  If you do not have a charge added to Favorites, the Charge Lookup screen defaults to **Lookup Charges**. By default, search is performed by **Project ID**.

  > **Note:** If you are logged in as a subcontractor, search is performed by **Work Assignment ID**.

  To perform a search using a search type other than **Project ID** (or **Work Assignment ID**), tap the **Project ID** field and tap a search type.
  Search types are user-defined fields, and their labels may change depending on your company's preferences.

  Enter a value in the **Search String** field and tap to perform the search.

4. Tap a charge.
5. On the Add Charge screen, enter the required values and tap **Done**.

   The charge is added to your timesheet.

Copy a Timesheet Charge on the Edit Charge Screen

You can copy a timesheet charge on the Edit Charge screen.

To copy a timesheet charge on the Edit Charge screen:

1. Tap an existing charge.
2. On the Edit Charge screen, tap **Copy Charge**.

Enter Time on Timesheet Line (Detailed Entry)

Use the Edit Charge screen to update the details of the selected charge.

To enter time on a timesheet line:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap anywhere outside the hour field on the timesheet line that you want to edit.
3. On the Edit Charge screen, tap the field that you want to update and then enter or tap appropriate values.
4. Tap **Done** to display the timesheet in the Day view.
5. Tap **Save**.

   > **Note:** During time and leave request entries, fractional hours entries are rounded based on the **Hours Increment** and **Rounding** settings for the timesheet class in Costpoint Time & Expense.

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Attention: For more information, see Rounding Time Entries Based on the Timesheet Class Settings.

Timesheet Status

The status of the selected timesheet and time period is displayed on the header of the Timesheet screen.

The status determines which processing options are available to you.

- **Missing**: This status indicates a missing timesheet for the selected period. This is available in Costpoint Mobile T&E and indicates that favorite charges are loaded automatically in the background.
- **Open**: This status indicates that the timesheet period is current.
- **Signed**: This status indicates that the timesheet has been signed but not yet approved by the supervisor.
- **Approved**: This status indicates that the timesheet has been approved by the supervisor but has not been processed.
- **Rejected**: This status indicates that the timesheet was signed but was rejected by the supervisor.
- **Processed**: This status indicates that the timesheet has been successfully exported.

Rounding Time Entries Based on the Timesheet Class Settings

To ensure that hour entries with fractional values are entered correctly, fractional hours entries are rounded based on the **Hours Increment** and **Rounding** settings for the timesheet class in Costpoint Time & Expense.

Note: Rounding rules are applied only if the **Hours Entry** field on the Settings screen is set to **Use Keypad**.

During time and leave request entries, the following rules are applied:

- 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.

Timesheets Tasks

Costpoint Mobile T&E allows you to perform several tasks for your timesheets. You can enter timesheet data, add or delete a timesheet line, copy a timesheet list, delete a timesheet line, create or delete a favorite, select an activity or task, and reopen a timesheet.

Attention: For more information, see "Manage Timesheet Entries" in Guides and Videos.

Change the Timesheet Period

Use the buttons on the Calendar screen to change the timesheet period that you want to view or update.

To change the timesheet period:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap .
3. On the Calendar screen, take one of the following actions:
    - Tap **Today** to display the current date and its timesheet entries on the Timesheet screen.
    - Tap to perform a search by tapping the appropriate values on the date picker.
    - To view periods or weeks for the previous month, tap .
    - To view periods or weeks for the next month, tap .
    - To view periods or weeks for the previous year, tap .
    - To view periods/weeks for the next year, tap .
4. Tap to close the calendar and return to the Timesheet screen.

Copy a Timesheet Charge from the Timesheet Screen

You can copy a timesheet charge from the Timesheet screen.

To copy a timesheet charge from the Timesheet screen:

1. Tap the date that you want to copy.
2. Touch and hold the charge until a pop up menu displays, and tap **Copy Charge**.

Delete a Timesheet Line

You can remove a timesheet line on the Timesheet screen or on the Edit Charge screen by deleting it.

To delete a timesheet line:

Take one of the following actions:

- On the Timesheet screen, swipe the timesheet line, and tap **Delete**.
- On the Edit Charge screen, tap **Delete Charge**.

Costpoint Mobile T&E displays a message that varies depending on the version of Costpoint you are using.

- If you are using Costpoint 8.1, Costpoint Mobile T&E displays "Are you sure you want to delete this charge?". Tapping **Yes** zeroes out the timesheet line.
- If you are using Costpoint 8.2, Costpoint Mobile T&E displays "This line will be cleared and deleted. Are you sure?". Tapping **Yes** removes the timesheet line.
  - If the **Do not Allow Delete Timesheet Line** option is selected in Costpoint Time & Expense, tapping **Save** refreshes the screen. The deleted timesheet line displays, and its recorded hours is set to **0**.
  - If the **Do not Allow Delete Timesheet Line** option is not selected in Costpoint Time & Expense, tapping **Save** permanently deletes the timesheet line.

Enter Time on a Timesheet (Quick Entry)

You can quickly enter time on a timesheet line using the onscreen keypad or the time picker on your mobile device.

To enter time on a timesheet quickly:

1. Tap  and tap **Timesheet**.
2. Tap the hour field of the selected timesheet line.
3. Enter the hour values using the onscreen keypad or the time picker.

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> **Note:** During time and leave request entries, fractional hours entries are rounded based on the **Hours Increment** and **Rounding** settings for the timesheet class in Costpoint Time & Expense.

> **Attention:** For more information, see Rounding Time Entries Based on the Timesheet Class Settings.

4. Tap Save.

> **Note:** When you add a new timesheet line, the onscreen keypad or the time picker defaults to the unrecorded remaining hours based on your standard work schedule for a day.
>
> For example, your standard work schedule is set to 8 hours a day. If it is your first entry for that day, the onscreen keypad or the time picker defaults to 8. If it is your second time entry and you already entered 3 hours, the onscreen keypad or the time picker defaults to 5.

Save a Timesheet

After you make any changes, tap **Save** to save the updated timesheet line to the Costpoint Time & Expense database.

Enter or Select Revision Explanations

You can use preset revision explanations when you make changes to a timesheet in Costpoint Mobile T&E 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.*

To enter or select an explanation for revisions made:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap the charge that you want to update.
3. Tap the field that you want to update and enter or tap appropriate values.
4. Tap **Done**.
5. Tap Save.

   The Revision Explanation screen displays with the following details:

   - **Line No**: This row displays the specific timesheet line that has been revised.
   - **Date:** This row displays the date when the revision was made.
   - **Revision Audit Detail:** This row displays the revision details.

6. Enter or search for the revision explanation code or enter a note to explain the revision made.
7. Tap **Done**.

Sign a Timesheet on the Timesheet Screen

You can sign a timesheet to submit it for approval.

To sign a timesheet:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap **Sign**.
3. On the Signature Certification screen, view your timesheet summary by day, week, charge, or pay type by tapping the corresponding tab.

   Note: This screen displays if **Use Summary on Sign** on the Settings screen is set to **On**.

   Attention: For more information, see Summary Screen.
4. Tap .
5. If there is a problem with the timesheet you are signing, Costpoint Mobile T&E displays errors and warnings.

   Tap **Continue** to submit the timesheet or tap to return to the timesheet and make changes.
6. Tap **OK**.

   The timesheet status is changed to **Signed**. The timesheet is sent back to the user, and the **Approve Timesheets** indicator on the Tasks screen of the supervisor is automatically updated to reflect the signed timesheet.

View the Calendar

Use the Calendar screen to quickly select a specific date for which you want to enter or update the time.

To view the calendar:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap .

   Note: You can also display the Calendar screen in the Summary view.

View a Timesheet

The current status and total hours of a timesheet period (in the Day view), including regular hours and overtime hours, are displayed on the Timesheet screen header.

To view a timesheet:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, take one of the following actions:
   - Tap to display the calendar.

     > **Attention:** For more information on how to display the timesheet period that you want to view or update, see Change the Timesheet Period.

   - On the date carousel, tap a date to display the timesheet containing the current date and its timesheet entries.
3. You can perform any of the following tasks using the date carousel:
   - Switch between different days of a timesheet period by swiping the date carousel or tapping a date (for example, if you are on Mon 1, tapping Thu 4 moves the calendar to Thu 4).
   - Tap or at either end of the date carousel to go back to the previous period or move to the next (for example, if you are on Mon 13–Sun 19, tapping moves the period to Mon 20–Sun 26).

   The date carousel is color-coded.
   - **Blue**: This color indicates that the date is the selected date.
   - **Gray**: This color indicates that the date is a non-work day.
   - **Green**: This color indicates that the date is an approved leave.
   - **Red**: This color indicates that the date has a pending leave approval.
   - **Yellow**: This color indicates that the date is a holiday.

Time Dashboard

Costpoint Mobile T&E provides different dashboard charts to represent your time entries for the period, pay type, and charge code in a graphical display of the summary data by time or by charges.

> **Note:** This feature is available if you have a license for the Time application. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

The dashboard charts are accessible through the tabs on the Timesheet-Summary screen.

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Attention: For more information, see Summary View.

Summary View

Use the Summary view to display timesheet data, such as days submitted for each timesheet and the hours submitted per charge or per pay type.

You can also use this view to display the revision history of the timesheet using the audit information.

Summary Screen

On the Timesheet screen, tapping ⋮ and then tapping **View Summary** displays the Summary screen.

The Summary screen displays the following details about the timesheet period:

- **Period**: This indicates the span of time that determines how work hours are calculated. If a timesheet is set up for a particular schedule (or period within a schedule), it is displayed next to the timesheet period.
- **Ending**: This indicates the timesheet period's end date.
- **Status**: This indicates the status of the timesheet period.
- **Revision**: This indicates the number of revisions made to the timesheet period.
- **Total**: This indicates the combined regular and overtime hours for the timesheet period.
- **Regular**: This indicates the total number of regular hours for the timesheet period.
- **Overtime**: This indicates the total number of overtime hours for the timesheet period.

Summary Screen Icons

On the Summary screen, tapping ⋮ displays several options.

Icon	Description
⋮	Tap ⋮ to display the following options: - **Calendar**: Tap this option to display the calendar. Attention: For more information, see View the Calendar in the Summary View. - **Sign**: Tap this option to sign a timesheet. Note: If your company uses the Hour Proration

Icon	Description

	feature, the Summary screen displays prorated hours after signing a timesheet.
	
	Attention: For more information, see Sign a Timesheet in the Summary View.
	
	- **Audit**: Tap this option to display the Audit screen and see the revision history of a timesheet.
	Tap any of the following tabs to filter your view:
	  - **Status**: Tap this tab to display the signature and approval details (approver and date of approval) for the current timesheet revision.
	  - **Revision**: Tap this tab to display the explanation for any revisions made to the timesheets.
	  - **Warnings**: Tap this tab to display the warnings you received when saving or signing the timesheet.
	
	Attention: For more information, see View Audit Information.
	
	- **Day View**: Tap this option to display the Timesheet screen in the Day view.

	Tap the **Chart View** icon to display the dashboard chart that corresponds to the tab you are viewing. Attention: For more information, see Summary Screen Tabs.

Summary Screen Tabs

On the Summary screen, tap any of the tabs to filter your view.

Tab	Description
Day	Tap this tab to display the hours you submitted for each day of the selected timesheet period, including any overtime charges. You can view the charge details submitted for each

Tab	Description
	day if the **Show Charge Detail in Day Summary** option on the Settings screen is set to **On**. Tapping **Chart View** displays the Period Breakdown chart, which shows the total hours you submitted for the current timesheet period as well as any overtime charges and the remaining hours for the current timesheet period.
Week	Tap this tab to display the hours submitted per week for the selected timesheet, including any overtime charges.
Charge	Tap this tab to display the hours per charge that you submitted for the selected timesheet, including any overtime charges, and the charge breakdown details based on the selected option in the **Charge Summary Breakdown** field on the Settings screen. This tab also displays the status of the timesheet and the total hours. Tap a charge to display the Charge screen, which shows the number of hours submitted per day for the charge you tap. Tapping **Chart View** displays 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.
Pay Type	Tap this tab to display the hours per pay type that you submitted for the selected timesheet. This tab also displays the status of the timesheet and the total hours. A cost-only charge is indicated by an asterisk (*). Tapping **Chart View** displays the Pay Type Breakdown chart, which shows the hours per pay type that you submitted for the current timesheet period as well as the status of the timesheet and the total hours.

Summary View Tasks

These are the procedures you can perform in the Summary view.

Sign a Timesheet in the Summary View

You can also sign a timesheet in the Summary view and submit it for approval.

To sign a timesheet:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap and tap **View Summary**.
3. On the Summary screen, tap and tap **Sign**.
4. On the Signature Certification screen, view your timesheet summary by day, week, charge, or pay type by tapping the corresponding tab.

   > **Attention:** For more information, see View Timesheet Summary.

   > **Note:** This screen displays if **Use Summary on Sign** on the Settings screen is set to **On**.

5. Tap .
6. If there is a problem with the timesheet you are saving, Costpoint Mobile T&E displays errors and warnings.

   Tap **Continue** to submit the timesheet or tap to return to the timesheet and make changes.
7. Tap **OK**.

   The timesheet status is changed to **Signed**. The timesheet is sent back to the user, and the **Approve Timesheets** indicator on the Tasks screen of the supervisor is automatically updated to reflect the signed timesheet.

View Audit Information

Use the audit information to see the revision history of a timesheet, which includes signature and approval details, explanation for the revisions, and any warnings received.

To view audit information:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap and tap **View Summary**.
3. On the Summary screen, tap and tap **Audit**.
4. On the Audit screen, tap the appropriate tab to filter your view.

   > **Attention:** For more information, see Summary Screen Icons.

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View the Calendar in the Summary View

You can view the calendar in Summary view to select a specific date quickly for which you want to enter or update time.

To view the calendar:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap and tap **View Summary**.
3. Tap and tap **Calendar**.

   Note: You can also display the calendar using the Timesheet screen.

View Timesheet Summary

You can view a timesheet summary by day, week, charge, or pay type on the Summary screen.

To view timesheet summary:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap and tap **View Summary**.
3. On the Summary screen, tap the appropriate tab to filter your view.

   Attention: For more information, see Summary View.

Timesheet Search

Use the Search screen to find existing timesheets based on specified criteria.

Typically, the primary role that performs approval, the supervisor, has tasks created based on the system setup. However, for backup supervisor, for example, the tasks are not created unless a process is run to escalate the tasks to them. If you are a backup supervisor, you can use the Search screen to find signed timesheets that require approval.

Note: Timesheet search is only available to users with rights to view or approve other users' timesheets.

Field	Description
Period	Tap this field to select a period to perform the timesheet search.

Field	Description
	▪ Schedule ▪ Year ▪ Period Ending This field is optional.
Function	Tap this field to select the user's functional role. This field defaults to the user's role that takes precedence over other users.
Group	Tap this field to select the user's group.
Timesheet Class	Tap this field to select the timesheet class to perform the timesheet search. **Note:** This field is available if you are using Costpoint 8.1.25 or later and Costpoint 8.2.4 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.
Filter	Tap this field to select a filter category to perform the timesheet search. You can filter by: ▪ Last Name ▪ ID ▪ Signature Last Name ▪ Signature ID ▪ Approver Last Name ▪ Approver ID **Note: Signature Last Name, Signature ID, Approver Last Name,** and **Approver ID** are available if you are using Costpoint 8.1.25 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.
Filter Value	Tap this field to enter a value for the selected filter category.
Timesheet Status	Tap an option to select the timesheet status to search. ▪ Open ▪ Signed ▪ Approved ▪ Rejected ▪ Processed

Field	Description
	You must tap at least one timesheet status to perform a search.
Missing	Tap the button in this field to set it to **On** and perform a search on missing timesheets. When you search for missing timesheets, you must specify a value in the **Period** field. When this field is set to **On**, all the selections made in the **Timesheet Status** field are cleared. When you tap any of the options in the **Timesheet Status** field, this field is set to **Off**. When your search identifies missing timesheets, the application will display a list of these timesheets. However, you will not be able to select or review any of the timesheets in the list. **Note:** This field is available if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

Search Timesheets

You must specify the required fields on the Search screen to perform a search, select a timesheet from the list, and perform the appropriate task such as approving a timesheet or viewing its audit information.

To search timesheets:

1. On the Timesheet screen, tap , and tap **Timesheet Search**.
2. Tap the appropriate fields to enter, or tap the appropriate values.

   If you are a backup supervisor, tap the **Function** field, and tap the function that corresponds to a backup supervisor role as defined by your company.
3. Tap .

   The application displays the timesheets that match the criteria you specify.
4. On the Search screen, tap the check mark next to the timesheet that you want to view.

   Tap **Select All** to select all timesheets in the list.
5. Tap **Review**.

   The timesheet displays on the Review screen.

   Attention: For more information, see Review Screen.
6. Tap , and perform any of the following options:
   - Tap **Approve** to approve the selected timesheet.
   - Tap **Reject** to reject the selected timesheet.
   - Tap **Audit** to view the audit information of the selected timesheet.
   - Tap **Day View** to view the selected timesheet in Day view.

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> **Note:** The values you specify in the **Function**, **Group**, and **Timesheet Status** fields remain as long as you are logged into the application.

Timesheet Correction

The timesheet correction feature allows you to correct previously processed timesheets. Depending on how your timesheet has been configured, you can use one of two methods to make corrections.

If the timesheet status is **Processed** and the timesheet period is still open, the **Correct** button on the timesheet is enabled. Tap the **Correct** button to change the timesheet status from **Processed** to **Open**, and modify the timesheet as needed.

If the timesheet status is Processed and the timesheet period is already closed, the **Request Correction** button on the timesheet is enabled. Tap the **Request Correction** button to send a timesheet correction request to the supervisor. You will receive a notification if the request is approved or rejected. If the timesheet correction request is approved, the **Correct** button on the timesheet becomes enabled, the timesheet status is changed from **Processed** to **Open**, and you can modify the timesheet as needed.

> **Attention:** For more information on this feature, see Correct a Processed Timesheet in this guide and "Timesheet Corrections Overview" in the Costpoint Online Help under **Time** > **Concepts** > **Timesheet Corrections**.

Correct a Processed Timesheet

You can correct previously processed timesheets depending on how your timesheet has been configured.

> **Attention:** For more information, see Timesheet Correction.

To correct a processed timesheet:

1. Tap and tap **Timesheet**.
2. Open the timesheet that you want to modify.
3. On the Timesheet screen, tap .
4. Tap **Correct**.

> **Note:** If the **Correct** button does not display, tap **Request Correction**.
>
> Costpoint Mobile T&E sends a timesheet correction request to the supervisor. You will receive a notification if the request is approved or rejected. If the timesheet correction request is approved, the

Correct button on the timesheet becomes enabled.

5. Modify the timesheet as needed and save your changes.

   Attention: For more information, see Save a Timesheet.

6. Sign the timesheet.

   Attention: For more information, see Sign a Timesheet on the Timesheet Screen.

Work Schedule

There are two types of work schedules: company and employee. Company schedules define standard work and non-work days and company holidays. Employee schedules derive from company schedules but may include modifications that reflect the employee's personal schedule.

On the Timesheet screen, tapping and then tapping **Work Schedule** displays the Work Schedule Dates screen. This screen displays a list of your work week. Tapping a week displays the details for each day of the week, including your work schedule properties and leave information.

You can only view your work schedule if you are viewing your own timesheets. Additionally, the work schedule displays the employee work schedule by default. If there is no employee work schedule, it will default to the company work schedule.

Attention: For more information on work schedule, see "Work Schedule" in the Costpoint Online Help under Time > Timesheets.

Advanced Charge Search

Use this feature to search for charge codes by Project Manager and Project Labor Category, and to add the charge line to your timesheets.

To use the Advanced Charge Search feature, go to the Timesheet screen and tap > **Advanced Charge Search**.

On the Advanced Search screen, you can filter and select charge codes by tapping either **Project Manager** or **Project Labor Category**.

Note: The label for **Project Labor Category** depends on how your company has configured the field.

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Attention: For more information, see Add Charge Codes by Project Manager or by PLC.

Add Charge Codes by Project Manager or by PLC

Use the Advanced Charge Search feature to add charge codes to your timesheets by Project Manager or Project Labor Category (PLC).

To add charge codes:

1. On the Timesheet screen, tap ⋮ > **Advanced Charge Search**.
2. On the Advanced Search screen, tap the drop-down arrow and then tap **Project Manager** or **Project Labor Category**.

   Note: The label for **Project Labor Category** depends on how your company has configured the field.
3. On the Project Manager or PLC screen, search and tap an entry from the list.
4. On the Advanced Search screen, tap the **Lookup** button to view the list of charges linked to your previous selection.
5. Tap one or more values from the list (indicated by a green check mark) and then tap **Done**.

   The charge line is added to your timesheet.

Favorites

Favorites are saved combinations of projects, tasks, and activities, which give you easy access to them when doing time registration.

Timesheet-Manage Favorites

Use the Manage Favorites screen to easily manage your timesheet charge favorites on a mobile device.

To display this screen, tap ⋮ on the Timesheet screen, and then tap **Manage Favorites**.

You can perform the following actions on the Timesheet–Manage Favorites screen:

- Load work percentage if your timesheet is generated to use the Generate Exception-Based Timesheets feature.
- Set to load the timesheet charge into your timesheet automatically when you open a new timesheet.
- Set the timesheet charge as a favorite charge either for a holiday or vacation time.
- Delete a favorite timesheet charge by swiping the row either to the left or right and then tapping the delete icon.

Each timesheet charge entry contains the following fields:

Field	Description
% (Work Percentage)	If your timesheet is generated to use the Generate Exception-Based Timesheets feature, **% for work percentage** displays next to the timesheet charge. Enter a work percentage for each favorite, and the percentages for all favorites must total 100%. Enter the percentages as whole numbers, 0 to 100. **Note:** This field displays only if you are using Costpoint 8.2 or later and the **Generate Exception-Based Timesheets** option in **Time & Expense > Time > Time Controls > Timesheet Classes** in Costpoint Time & Expense is selected.
Load	Tap the button to set it to **On** and automatically load the timesheet charge into your timesheet when you open a new timesheet.
Holiday	This field displays if your timesheet is set up to automatically enter holiday hours when it loads favorites. Tap the button to set it to **On** and set the timesheet charge as favorite for a holiday time. **Note:** This field displays if the **Populate Scheduled Leave on Timesheet Open** option in **Time & Expense > Time > Time Controls > Timesheet Classes** in Costpoint Time & Expense is selected.
Vacation	This field displays if your timesheet is set up to automatically enter scheduled vacation hours when it loads favorites. Tap the button to set it to **On** and set the timesheet charge as favorite for a vacation time. **Note:** This field displays if the **Populate Scheduled Leave on Timesheet Open** option in **Time & Expense > Time > Time Controls > Timesheet Classes** in Costpoint Time & Expense is selected.

Field	Description
Comment (Text Field)	Tap the text field to add a comment to the favorite charge. If the favorite charge is added to a timesheet line, the same comment also displays in the Charge Comments field of the timesheet line charge. **Note:** This field displays only if you are using Costpoint 8.2 or later.

Note: Some fields on this screen display only if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

To save the changes you made on this screen to the Costpoint Time & Expense server, tap **Save**.

Attention: For additional information, see "Charge Tree Lookup Dialog Box" in the Costpoint Online Help under Time & Expense > Time > Timesheets > Areas of the Timesheet Screen > Timesheet Subtasks.

Favorite and Autopopulate Fields

The following table describes the behavior of the **Favorite** and **Autopopulate** fields depending on your action on a specific screen.

Screen	Action	Behavior
Add Charge Screen	Add a charge from the Favorites list on the Charge Lookup screen	▪ The **Favorite** field is set to **On** and disabled. ▪ The **Autopopulate** field is disabled and defaults to the charge favorite setting.
Add Charge Screen	Add a charge from the Lookup Charges list on the Charge Lookup screen	▪ The **Favorite** field is set to **Off** and enabled. ▪ The **Autopopulate** field is set to **Off** and disabled. If you are using Costpoint 8.1.13 or later: ▪ If you set the **Favorite** field to

Screen	Action	Behavior
		On, the **Autopopulate** field is automatically set to **On**. When you tap **Done** on the Add Charge screen, the charge is saved as a favorite and becomes available in the Favorites list even if the timesheet is not saved.
Edit Charge Screen	Edit an existing charge with the timesheet line derived from a favorite	▪ The **Favorite** field is set to **On** and disabled. ▪ The **Autopopulate** field is disabled and defaults to the charge favorite setting. ▪ If you change one of the UDTs, the **Favorite** field is set to **Off** and enabled, and the **Autopopulate** field is set to **Off** and disabled.
Edit Charge Screen	Edit an existing charge with the timesheet line not derived from a favorite	▪ The **Favorite** field is set to **Off** and enabled. ▪ The **Autopopulate** field is set to **Off** and disabled. When you tap **Done** on the Edit Charge screen, the charge is saved as a favorite and becomes available in the Favorites list even if the timesheet is not saved. If you are using Costpoint 8.1.13 or later: ▪ If you set the **Favorite** field to **On**, the **Autopopulate** field is automatically set to **On**.

Note: To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

Timesheet Favorites Tasks

These are the procedures you can perform to manage your timesheet favorites.

Add a Charge to Favorites

After you add a charge to the Favorites list, it becomes available on the Favorites tab on the Charge Lookup screen.

To add a charge to Favorites:

1. On the Timesheet screen, tap **Add**.
2. On the Charge Lookup screen, tap **Lookup Charges**.

   By default, search is performed by **Project ID**.

   > **Note:** If you are logged in as a subcontractor, search is performed by **Work Assignment ID**.

3. To perform a search using a search type other than **Project ID**, tap the **Project ID** field (or **Work Assignment ID**), and tap a search type.

   > **Note:** Search types are user-defined fields and their labels may change depending on your company's preferences.

4. Enter a search string in the **Search String** field, and tap to perform the search.
5. Tap the charge that you want to add to **Favorites**.
6. Tap **On/Off** in the **Favorite** field to set it to **On**.
7. Tap **Done**.

Delete a Favorite

You can remove a charge from the Favorites list by deleting it.

To delete an entry from Favorites:

1. On the Timesheet screen, tap **Add**.
2. On the Charge Lookup screen, tap **Favorites**.
3. Swipe the timesheet charge that you want to delete from the list, and then tap **Delete**.

   Costpoint Mobile T&E prompts you to save the timesheet to complete the delete operation.

4. Tap **Yes**.
5. On the Timesheet screen, tap **Save** to save your changes.

The charge is now deleted from **Favorites**.

> **Attention:** Alternatively, you can remove a charge from the Favorites list on the Manage Favorites screen.

Time Clocking

If your timesheet class in Costpoint Time & Expense is configured for the Start-Stop Time or the Time In-Out feature, the related screens will be available through Costpoint Mobile T&E, allowing you to easily track and record start and stop times for each new task and for breaks and meals.

> **Attention:** For more information, see "Manage Timesheet Entries" in Guides and Videos.

Time In-Out Feature

Use the Time In-Out feature to record your starting and stopping times and your lunches and breaks.

The Time In-Out feature is available in the Costpoint Mobile T&E application only if your company uses it. Your timesheet class must be configured to **Attendance Required** or **Attendance Optional** in Costpoint Time & Expense in order for this feature to be available on a mobile device through Costpoint Mobile T&E.

> **Attention:** For more information on how to configure the Time In-Out feature, see "Configure the Timesheet Class to Use the Time Clocking Features" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

If the Time In-Out feature is configured, **Time Clock** displays on the Timesheet screen. Tap **Time Clock** to display the Time In-Out screen and record your starting and stopping times and your lunches and breaks.

The in and out times default to your schedule and are editable. You can move from one date to another within the timesheet period, add your in and out time entries, and tap **Apply** anytime.

Time In-Out Screen

Use the Time In-Out screen to record your starting and stopping times and your lunches and breaks.

Screen Fields

> Note:
>
> - The timesheet date displays the date currently selected in the timesheet.

- The in and out times default to your schedule and are editable. You can move from one date to another within the timesheet period, add your in and out time entries, and tap **Apply** anytime.

Attention: For more information on the screen fields, see "Time In/Out Subtask" in the Costpoint Online Help under Time & Expense > Time > Timesheets > Areas of the Timesheet Screen > Timesheet Subtasks.

Field	Description
Date In	Tap this field or the calendar icon to select the date. Eligible dates are the date you select and the same date minus one day.
Date Out	Tap this field or the calendar icon to select the date. Eligible dates are the date you select and the same date plus one day.
Time In	Tap this field or the clock icon to select the time that you started working in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM. The default value for a new entry is the end time for on-site work from the user's work schedule.
Time Out	Tap this field or the clock icon to select the time that you stopped working in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM. The default value for a new entry is the end time for on-site work from the user's work schedule.
Lunch Start	If lunch start and end times are being tracked, tap this field or the clock icon to select the time that you went for lunch in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM.
Lunch End	If lunch start and end times are being tracked, tap this field or the clock icon to select the time that you returned from lunch in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM.
[-] Non-Work Hours	Tap this field to select the number of hours between the Time In and Time Out hours taken for breaks and other non-work activities. Do not include lunch hours.
[+] Off-Site Hours	Tap this field to select the number of hours (besides the hours between the Time In and Time Out hours) that are off-site hours. These hours are not included in the time in and out calculation.
Time In/ Out Hours	This field displays the gross hours, calculated by subtracting Time In from Time Out.
Total Hours	This field displays the total number of hours recorded for the day.
Comments	Tap this field to enter comments for the day.

Field	Description
Apply	Tap this button to validate the time in and out times and to close the Time In-Out screen. The Costpoint Time & Expense database is updated with time in and out information when you save the timesheet.
Clear	Tap this button to delete your entries on the Time In-Out screen.

Start-Stop Time Feature

Use the Start-Stop Time feature to record your start and stop times for each new task, breaks, and meals.

The Start-Stop Time feature is available in Costpoint Mobile T&E only if your company uses it. Your timesheet class must be configured to **Break Tracking**, **Start/Stop Detail**, or **Start/Stop Summary** in Costpoint Time & Expense in order for this feature to be available on a mobile device through Costpoint Mobile T&E.

Attention: For more information on how to configure the Start-Stop Time feature, see "Configure the Timesheet Class to Use the Time Clocking Features" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

The related Start-Stop Time screens displayed in the Costpoint Mobile T&E application depend on how your timesheet class is configured for the Start-Stop Time feature.

Start/Stop Detail and Start/Stop Summary

If your timesheet class is configured to **Start/Stop Detail** or **Start/Stop Summary**, you can enter start and stop times for individual timesheet charge rows, meals, and breaks.

The following sections display on the Timesheet screen:

- **Break**: Tap this section to display the Start-Stop Time Break screen and enter your start and stop times for a non-meal break. After entering your start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where the total number of non-meal break hours recorded for the day is displayed.
- **Meal**: Tap this section to display the Start-Stop Time Meal screen and enter your start and stop times for a meal break. After entering your start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where the total number of meal hours recorded for the day is displayed.

In addition, (labeled **Start Time**) displays next to the hour field of each timesheet charge row. Tap the icon to display the Start-Stop Time screen and enter your start and stop times for the timesheet charge.

Note: The Start-Stop Time screen header displays the timesheet charge for which you are entering the start and stop times.

After entering the start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where becomes red (labeled **Stop Time**), and the gross hours are displayed in the hour field.

> **Note:** Use the Start/Stop Summary feature for a timesheet period only through Costpoint Mobile T&E or through Costpoint Time & Expense. If you enter timesheet data through Costpoint Time & Expense and then make updates through Costpoint Mobile T&E, you will encounter errors.

Break Tracking

If your timesheet class is configured to **Break Tracking**, you can enter start and stop times for breaks and meals.

Time Clock displays on the Timesheet screen. Tap the icon to display the Start-Stop Time screen and enter start and stop times for meals and breaks.

Start-Stop Time Screen (Start/Stop Detail or Start/Stop Summary)

Use the Start-Stop Time screen to record start and stop times for individual timesheet charge rows, meals, and breaks.

Screen Fields

> Note:
>
> - This screen displays if your timesheet class in Costpoint Time & Expense is configured to **Start/Stop Detail** or **Start/Stop Summary**.
> - The start time defaults to your schedule and is editable.
> - The Start-Stop Time screen header displays the type of charge for which you are entering the start and stop times. For example, if you tap next to the timesheet charge on the Timesheet screen, the header displays the timesheet charge name. If you tap **Meal** on the Timesheet screen, the header displays **Meal**.
> - Use the Start/Stop Summary feature for a timesheet period only through Costpoint Mobile T&E or through Costpoint Time & Expense. If you enter timesheet data through Costpoint Time & Expense and then make updates through the Costpoint Mobile T&E application, you will encounter errors.
> - If you are using the Start/Stop Detail or Start/Stop Summary feature, you will be able to view but not edit the work and break hours per day of timesheets with **Processed** status.

> **Attention:** For more information on the Start–Stop Time screen fields, see "Start Stop Times Subtask" in the Costpoint Online Help under **Time & Expense** > **Time** > **Timesheets** > **Areas of the Timesheet Screen** > **Timesheet Subtasks**.

Field	Description
Total Hours	This field displays the total number of work period hours recorded for the day.
Start Date	Tap this field or the calendar icon to select the date on which the time period began.
Start Time	Tap this field or the clock icon to select the starting time of the break, meal, or work period.
Stop Date	Tap this field or the calendar icon to select the date on which the time period ended.
Stop Time	Tap this field or the clock icon to select the ending time of the break, meal, or work period. You can leave this field blank as long as it is the only record without a stop time and is for the latest start/stop time line for the date.
Hours	This field displays the gross hours, calculated by subtracting Start Time from Stop Time. This field displays **Minutes** if the **Calculate Start/Stop Time in Minutes** option on the Basic Information tab of the Timesheet Classes screen (**Time** > **Time Controls**) in Costpoint Time & Expense is selected, allowing start and stop times to be summarized by minutes instead of hours. Rounding is still based on company settings, as for example, by the quarter hour or half hour and so on. In addition, once an effective date is set in Costpoint Time & Expense, any time recorded on the timesheet up to that date will continue to be summarized either by hours or as a percentage.
Comments	Tap this field to enter a short note concerning the break, meal, or work period.
Apply	Tap this button to validate the start and stop times and to close the Start-Stop Time screen. The Costpoint Time & Expense database is updated with start and stop time information when you save the timesheet. When you return to the Timesheet screen, the total number of non-meal break or meal hours recorded for the day is displayed on the corresponding section. If you enter start and stop times for a timesheet charge,  becomes red (labeled **Stop Time**), and the gross hours are displayed in the hour field.
Clear	Tap this button to delete your entries on the Start-Stop Time screen.

Line Allocation Section

The bottom part of the Start-Stop Time screen displays the time entries recorded for the timesheet charge for the day. You can edit or delete a time entry in this section.

Attention: For more information, see Edit Start and Stop Times.

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Start-Stop Time Screen (Break Tracking)

Use the Start-Stop Time screen to enter your start and stop times for meals and breaks.

Screen Fields

Note:

- This screen displays if your timesheet class in Costpoint Time & Expense is configured to **Break Tracking**.
- The start time defaults to your schedule and is editable.
- On the date carousel, tap the date for which you want to enter your start and stop times.
- Second-level break tracking is supported only if you are using Costpoint 8.2.12 or later.

Attention: For more information on the Start-Stop Time screen fields, see "Start Stop Times Subtask" in the Costpoint Online Help under **Time & Expense** > **Time** > **Timesheets** > **Areas of the Timesheet Screen** > **Timesheet Subtasks**.

Field	Description
Charge	Tap this field and select the type of charge for which you are entering start and stop times. Your options are: - **Meal**: Tap this option to enter start and stop times for a meal break. - **Break**: Tap this option to enter start and stop times for a non-meal break.
Entered Hours	This field displays the gross hours, calculated by subtracting Start Time from Stop Time.
Start Date	Tap this field or the calendar icon to select the date on which the time period began.
Start Time	Tap this field or the clock icon to select the starting time of the break or meal.
Stop Date	Tap this field or the calendar icon to select the date on which the time period ended.
Stop Time	Tap this field or the clock icon to select the ending time of the break or meal. You can leave this field blank as long as it is the only record without a stop time and is for the latest start and stop time lines for the date.
Comments	Tap this field to enter a short note concerning the break or meal.
Hours	This field displays the total number of hours recorded for the day.
Apply	Tap this button to validate the start and stop times and to close the Start-Stop Time screen. The Costpoint Time & Expense database is updated with start and stop time information when you

Field	Description
	save the timesheet.
Clear	Tap this button to delete your entries on the Start-Stop Time screen.

Line Allocation Section

The bottom part of the Start-Stop Time screen displays the time entries recorded for the timesheet charge for the day. You can edit or delete a time entry in this section.

> **Attention:** For more information, see Edit Start and Stop Times.

Time Clocking Tasks

These are the procedures you can perform on timesheets if your timesheet class in Costpoint Time & Expense is configured for the Start-Stop Time or the Time In-Out feature.

Record Time In and Out Entries

Use the Time In-Out screen to record your starting and stopping times and your lunches and breaks.

The Time In-Out feature is available only if your timesheet class in Costpoint Time & Expense is configured for it. The in and out times default to your schedule and are editable. You can move from one date to another within the timesheet period, add your in and out time entries, and tap **Apply** anytime.

To record time in and out entries:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap **Time Clock**.
3. On the Time In-Out screen, enter, tap, or specify the values in the appropriate fields.
4. Tap **Apply** to validate the time in and out entries and to close the Time In-Out screen.

   > **Note:** If there is a problem with the time in and out entries, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to proceed.

   The Costpoint Time & Expense database is updated with the time in and out information when you save the timesheet.

Record Start and Stop Times (Start/Stop Detail or Start/Stop Summary)

Use the Start-Stop Time screen to record your start and stop times for individual timesheet charge rows, meals, and breaks.

> Note:
>
> - The Start-Stop Time feature is available only if your timesheet class in Costpoint Time & Expense is configured for it.
> - This procedure applies if your timesheet class is configured to **Start/Stop Detail** or **Start/Stop Summary**.

To record start and stop times:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, do one of the following:
   - Tap **Meal** to enter the start and stop times for a meal break.
   - Tap **Break** to enter the start and stop times for non-meal break.
   - Tap next to the timesheet charge for which you want to enter start and stop times.
3. On the Start-Stop Time screen, enter, tap, or specify the values in the appropriate fields.
4. Tap **Apply** to validate the start and stop time information and to close the Start-Stop Time screen.

   > Note: If there is a problem with the start and stop time information, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to proceed.

   Costpoint Mobile T&E saves the information to the Costpoint Time & Expense database, and the time entry is displayed at the bottom of the Start-Stop Time screen.
5. Tap to return to the Timesheet screen.

   On the Timesheet screen, the total of hours recorded for the day is displayed on the corresponding section.

   If you enter start and stop times for a timesheet charge, becomes red (labeled **Stop Time**), and the gross hours are displayed in the hour field. The Costpoint Time & Expense database is updated with the start and stop time information when you save the timesheet.

Record Start and Stop Times (Break Tracking)

Use the Start-Stop Time screen to enter your start and stop times for meals and breaks.

> Note:

- The Start-Stop Time feature is available only if your timesheet class in Costpoint Time & Expense is configured for it.
- This procedure applies if your timesheet class is configured to **Break Tracking**.

To record start and stop times:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, tap **Time Clock**.
3. On the Start-Stop Time screen, enter, tap, or specify the values in the appropriate fields.
4. Tap **Apply** to validate the start and stop time information and to close the Start-Stop Time screen.

   Note: If there is a problem with the start and stop time information, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to proceed.

   The Costpoint Mobile T&E application saves the information to the Costpoint Time & Expense database, and the time entry is displayed at the bottom of the Start-Stop Time screen.

5. Tap to return to the Timesheet screen.

   On the Timesheet screen, the total number of non-meal break or meal hours recorded for the day is displayed on the corresponding section. The Costpoint Time & Expense database is updated with the start and stop time information when you save the timesheet.

Edit Start and Stop Times

Use the Start-Stop Time screen to edit recorded start and stop times for breaks and meals.

The Start-Stop Time feature is available only if your timesheet class in Costpoint Time & Expense is configured for it.

Attention: For more information, see Start-Stop Time Screen (Start/Stop Detail or Start/Stop Summary) and Start-Stop Time Screen (Break Tracking).

To edit start and stop times:

1. Tap and tap **Timesheet**.
2. On the Timesheet screen, do one of the following:
   - Tap **Meal** or tap **Break**.

- Tap next to hour field of a timesheet charge row.

  Note: This icon is available only if your timesheet class is configured for **Start/Stop Detail** or **Start/Stop Summary**.

3. On the Start-Stop Time screen, scroll down to the bottom to see the time entries recorded for the timesheet line for the day.
4. To edit a time entry, tap next to it.

   The Start-Stop Time screen is populated with data you saved for the time entry.
5. Enter or specify the values in the appropriate fields and tap **Apply** to save your changes.
6. To delete a time entry, swipe the time entry that you want to delete from the list and then tap **Delete**.

Time Clock

The Time Clock screen enables you to record start and stop times automatically through your device's clock, providing an intuitive interface that registers punches without requiring any manual data entry.

The Time Clock icon is displayed on the Costpoint Mobile T&E menu if:

- You are using Costpoint version 2026.1 or later.

  Note: To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.
- The **Time Clock** option on the Basic Information tab of the Timesheet Classes screen in Costpoint Time & Expense is selected.

Tapping **Time Clock** displays the Time Clock screen.

Important: Any required links must be set up by default or come correctly from the charge, as no other UDTs are displayed on the Time Clock screen. For example, UDT07 and UDT10 are supported, and UDT10 is always required.

Note: If you use Time Clock and no timesheet exists for the current period, Costpoint Mobile T&E creates a new timesheet in the background. However, the timesheet is not created until you add a charge, unless timesheet lines are successfully loaded from favorites.

Attention: For more information on how to configure this feature, see "Time Clock" in the Costpoint Online Help under **Time & Expense** > **Time** > **Timesheets**.

Time Clock Screen

Use the fields and buttons on the Time Clock screen to record your start and stop times for a task automatically.

> **Note:** When you switch tasks or change the charge to which you are recording the start and stop times, and Costpoint Mobile T&E is configured for explanations, the application displays the Revision Explanation screen, where you must select an explanation code or enter your reason to proceed.

> **Note:** When selecting charges, Costpoint Mobile T&E displays the picker if you have five or fewer charges. If you have six or more charges, it displays the Charge screen.

Icons

The table below provides information on the icons available on the Time Clock screen.

Icon	Description
	Tap this icon to display the following options: ▪ Manage Favorites: Tap this option to display and view the Manage Favorites screen. **Important:** You currently do not have the functionality to add favorites within the Time Clock screen. This capability is planned for a future enhancement. ▪ **Request to Correct**: Tap this option to display the Correction Request screen, where you can select the dates to correct and enter the reason for the correction. After you tap **Apply** to submit the dates for correction, this option changes to **Pending Correct** and remains that way until your supervisor applies the correction. This option is always visible unless your timesheet has no entries or contains no hours or comments. ▪ **View Summary**: Tap this option to display the Period Summary screen, where you can view the charge details for each day in the timesheet period either by charge or by day. ▪ **Help**: Tap this option to view the help topic for this screen.

Icon	Description
Sign	Tap this icon to sign your timesheet. Once signed, the timesheet status updates to **Signed**. Note: This option becomes enabled after you tap the **End Day** button.
Save	Tap this option to save the comments you entered for the task. This option displays when you enter comments in the **Comments** field in the Daily Charge Details section.

Header Fields

This section displays the user's identification, the period end date, and the timesheet status.

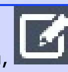
Field	Description
Name	This field displays the user name.
ID	This field displays the user ID.
Period Ending	This field displays the timesheet period ending date.
Status	This field displays the timesheet status.
Missed End Day	This button becomes available and enabled if any task in the timesheet period is missing a stop time entry. Tap this button to display the Missed End Day screen, where you can record the end time for any task during the timesheet period for which you did not stop tracking time.

Daily Charge Section

Use this section to either start your day, switch to a new task, or end your day. Dates and times for each task are automatically captured based on your device's clock.

Field or Button	Description
Date	This field displays the current date in the timesheet period.
Start	The time stamp displayed in this field marks the

Field or Button	Description
	commencement of your work on the current charge. The timestamp is recorded when you tap **Start Day** or **Switch Task**. Entries for this field are not manually editable.
Stop	The time stamp displayed in this field marks the end of your work on the current charge. The default value is blank. The current date displays when you tap **Switch Task** or **End Day**.
Switch Task	Tap this button to switch between tasks during the day. Select a charge from the list of existing charges in the **Charge** field, or add a new charge by tapping the **Add New** button to display the Charge Lookup dialog box and select a charge from your favorite charges or all charges. Once the new charge is added, select it from the charge list. Then, tap the **Start** button to begin recording time for the new task. Costpoint Mobile T&E then records the stop time for the previous task and the start time for the new one. This button is enabled only after the day has started.
Start Day	Tap this button to begin recording time. Select a charge from the list of existing charges in the **Charge** field, or add a new charge by tapping the **Add New** button to display the Charge Lookup dialog box and select a charge from your favorite charges or all charges. Once the new charge is added, select it from the charge list. Then, tap the **Start** button to begin recording time for the task. **Note:** Meal and break charges are not displayed when you start the day.
End Day	Tap this button to record the end of your workday for the current task. Costpoint Mobile T&E records the stop date and the stop time, and updates the timesheet accordingly.

Field or Button	Description
	Note: You cannot tap this button while on a meal or break. After you tap this button,  **Sign** becomes enabled, allowing you to sign your timesheet.
Project or MO	This field displays the project or MO to which the start and stop times are recorded, if applicable.
Account	This field displays the account to which the start and stop times are recorded, if applicable.
Charge	This field displays the charge to which the start and stop times are recorded.

Charges Section

Use this section to view the available charges for the task.

Field	Description
Existing	Tap this button to display the Charge screen and view existing charges. If no charges exist, this button is disabled.
New Charge	Tap this button to display the Charge Lookup screen and select a charge from either the list of favorite charges or all charges.

Daily Charge Details Section

Use this section to view detailed records of your daily charges. Dates and times for each task are automatically captured based on your device clock when you tap **Start Day**, **Switch Task**, or **End Day**.

This section displays **No Recorded Task Yet** if you have not recorded any tasks.

Field	Description
Charge	This field displays the charge code that was selected for the task.
Start Date	This field displays the date the task was started.

Field	Description
Start Time	This field displays the time the task was started.
Stop Date	This field displays the date the task was stopped.
Stop Time	This field displays the time the task was stopped.
Minutes	This field displays the time elapsed in minutes for the current charge code.
Comment	Use this field to enter comments related to the task and then tap **Save** at the top of the screen.

Missed End Day Screen

Use this screen to record the end time for any task during the timesheet period for which you did not stop tracking time.

To display this screen, tap the **Missed End Day** button the Time Clock screen.

The Missed End Day screen displays the total number of tasks with missing stop time entries. The **Back** and **Next** buttons allow navigation through each entry. The Charge Information section displays the details about the project or MO, account, and charge. The Time Information section displays the start date and time. In the **Stop Time** field, enter the stop time, which must occur after the start time; otherwise, Costpoint Mobile T&E displays the message **Start Time must be before Stop Time**. Enter your reason in the **Comments** field and then tap **Save** to save your entries.

Correction Request Screen

Use this screen to select and submit timesheet dates for correction when using the Time Clock feature.

On the Time Clock screen, tapping and then tapping **Request to Correct** displays the Correction Request screen.

The Correction Request screen displays days for the timesheet period. A check mark displays next to any date in the list, along with a field to enter the reason. You may tap one or multiple dates, but you must enter a reason for each one; otherwise, Costpoint Mobile T&E displays the message **Reason for Correction is required**. Tapping the **Apply** button submits your requests.

Period Summary Screen

Use this screen to view the charge details for each day in the timesheet period either by charge or by day.

On the Time Clock screen, tapping and then tapping **View Summary** displays the Period Summary screen.

By default, the Period Summary screen displays the details about the current timesheet period in Day view. Tap or to navigate between timesheet periods.

> **Note:** Past timesheet periods are read-only. You can only view the daily charge details and tap the **Request to Correct** option if you need to make a correction.

The Period Summary screen displays the following details about the timesheet period:

- **Total in Minutes**: This field displays the total number of minutes for the timesheet period.
- **Total Regular Hours**: This field displays the total number of regular hours for the timesheet period.
- **Total Overtime Hours**: This field displays the total number of overtime hours for the timesheet period.

Tap any of the tabs to filter your view.

- **Day**: Tap this tab to view the start and stop time details by day.
- **Charge**: Tap this tab to view the start and stop time details by charge.

> **Note:** Tap to expand or collapse the view, whether you are in Day view or Charge view.

Time Clock Tasks

These are the procedures you can perform on timesheets if your timesheet class in Costpoint Time & Expense is configured for the Time Clock feature.

Record Start and Stop Times

Use the Time Clock screen to record your start and stop times for a task automatically.

To record your start and stop times:

1. Tap and tap **Time Clock**.
2. On the Time Clock screen, tap the **Start Day** button to initiate your workday and do one of the following:
   - Select a charge from the list of existing charges in the **Charge** field and then tap the **Start** button.
   - Add a new charge by tapping the **Add New** button to display the Charge Lookup dialog box and select a charge from your favorite charges or all charges. Once the new charge is added, select it from the charge list and then tap the **Start** button.

3. Tap the **End Day** button to record the end of your workday for the current task.

> Note:
> - You cannot tap the **End Day** button while on a meal or break.
> - To switch between tasks during the day, tap the **Switch Task** button. For more information, see Switch Between Tasks.

4. Tap **Sign**.

   Once signed, the timesheet status updates to **Signed**.

Switch Between Tasks

You can switch between tasks during the day using the Time Clock feature.

The **Switch Task** button on the Time Clock screen becomes available only after you initiate your workday by tapping the Start Day button.

To switch between tasks:

1. On the Time Clock screen, tap the **Switch Task** button.

   Costpoint Mobile T&E then records the stop time for the previous task and the start time for the new one.
2. Update your charge details by doing one of the following:
   - Select a charge from the list of existing charges in the **Charge** field.
   - Add a new charge.
     a. Tap the **Add New** button.
     b. In the Charge Lookup dialog box, select a charge from your favorite charges or all charges.
     c. In the **Charge** field, select the new charge from the list.

> Note: When you switch tasks or change the charge to which you are recording the start and stop times, and Costpoint Mobile T&E is configured for explanations, the application displays the Revision Explanation screen, where you must select an explanation code or enter your reason to proceed.

3. Tap the **Start** button.

   Costpoint Mobile T&E begins recording time for the new task.

Capture Receipt

This screen allows you to either take an image of the receipt using your device's camera or select an image of the receipt from the archive or camera gallery, and easily attach the captured or selected image of the receipt to an expense report.

The Capture Receipt feature is only available if the **Allow Mobile Expense Application** option is selected in Costpoint Time & Expense.

Attention: For more information on how to configure access to the Mobile Expense application, see "Allow Access to the Costpoint Mobile T&E Application" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

ICR Processing in Expense

You can use Capture Receipt with the intelligent character recognition (ICR) technology. If ICR processing is enabled, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the outstanding expense created, and populates the matched fields on the Expense screens. Costpoint Mobile T&E sends the image to Deltek's trusted partner for processing and data extraction.

Attention: For more information on the populated/mapped fields during Capture Receipt, see "My Outstanding Expenses" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports**.

Capture Receipt with ICR processing is enabled if the following conditions are met:

- The **Allow ICR Expense Processing** option is selected in Costpoint Time & Expense.

  Attention: For more information on how to configure the option, see "Enable or Disable ICR Processing in Capturing Expense" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

- The **Use ICR for expenses** option on the Settings screen is set to **On**.

When enabled, the ICR feature works when you use your device's camera, or select an image from the archive or camera gallery through Capture Receipt.

Note: Upon the return of the image and extracted data, Costpoint Mobile T&E immediately deletes the image and extracted data from the partners system so it is only stored in your Costpoint instance.

Add Expense Screen

The Add Expense screen displays after a receipt is captured or an image of a receipt is selected through the Capture Receipt feature. Use the Add Expense screen to create a new expense entry and add details to it.

After completing the Add Expense screen details, you can save the receipt and add it to an expense report at a later time, or add it to an expense report immediately. If you choose the latter, you can create a new expense report from it, or attach it to an existing expense report.

Attention: For more information, see Attach a Receipt using Capturing Receipt.

Note: Tap ⋮, and tap **Help** to view the help topic for this screen.

Expense Reports

The Expense Reports screen allows you to manage expense reports and outstanding expenses depending on your role.

The Expense Reports screen contains two tabs:

- **Expense Reports:** This tab displays a list of your claimed expenses.
- **Outstanding Expenses:** This tab displays a list of expenses that were imported from a credit card feed or manually entered as an expense and are yet to be claimed.

The Expense Reports screen is available only if the **Allow Mobile Expense Application** option is selected in Costpoint Time & Expense.

Attention: For more information on how to configure access to the Mobile Expense application, see "Allow Access to the Costpoint Mobile T&E Application" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

To manually add expenses either from a credit card or from another source using Costpoint Mobile T&E, you must have a batch expense type called MANUAL set up.

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

Mobile Expense Access for Subcontractors

For subcontractors, it is important to understand the requirements for accessing Costpoint Mobile T&E.

These requirements are as follows:

- You must have access to the Mobile Expense application.
- Your expense class must indicate that it is for subcontractors.
- Your resource type must be set to subcontractor and with access to the Expense module.

Attention: For more information on how to configure access to the Mobile Expense application for subcontractors, see "Set up the Timesheet and Expense Classes for a Subcontractor" and "Assign a Seat License and Provide Module Access to a Subcontractor" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

Mobile Expense Access for Proxy Users

A proxy user is a supervisor or a backup supervisor who has proxy rights to create, edit, and submit expense reports on behalf of other users.

Note: Proxy permission is set by your system administrator for your Timesheet Group Class and functional role rights through Costpoint Time & Expense.

Note: This feature is available if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

If you are logged into Costpoint Mobile T&E with a proxy user role, displays on the Expense Reports screen. Tapping and tapping **View Others** allows you to search by **Search Name** or by **Search ID** among the users for whom you are designated as a proxy. After selecting a user, the Expense Reports screen refreshes with the selected user's expense reports on the Expense Reports tab. After tapping an entry, the expense report information becomes available to you. You can create, edit, and submit expense reports as you normally would if you were managing your own expense report, if the role permits.

Note: Capturing and accessing other users' outstanding expenses is currently not supported. The Outstanding Expenses tab always displays the expense list of the logged-in user.

Attention: For more information, see Expense Report Tasks.

Tapping **View Mine** refreshes the Expense Reports screen with the list of your own expense reports.

Note: When you tap an entry, the screen header displays **My Expense Report**.

Manage Expense Reports as a Proxy User

As a proxy user, you can create, edit, and submit expense reports on behalf of other users, if the role permits.

Note: Proxy permission is set by your system administrator for your Timesheet Group Class and functional role rights through Costpoint Time & Expense.

Attention: For more information on proxy users, see Mobile Expense Access for Proxy Users.

To manage expense reports as a proxy user:

1. On the Expense Reports screen, tap , and tap **View Others**.
2. On the Expense Reports tab, perform one of the following actions:

- Scroll through the list of expense reports and tap an entry.
- Tap **Search Name** to search for user by name, tap , and tap an entry from the list.
- Tap **Search ID** to search for user by ID, tap , and tap an entry from the list.

The expense report information is displayed on the screen.

> Note: Capturing and accessing other users' outstanding expenses is currently not supported. The Outstanding Expenses tab always displays the expense list of the logged-in user.

3. Perform the required expense report task (for example, add, edit, or submit an expense report.)

> Attention: For more information, see Expense Report Tasks.

4. Tap **View Mine** to refresh the Expense Reports screen with the list of your own expense reports.

> Note: When you tap an entry, the screen header displays **My Expense Report**.

Expense Reports Listing

The Expense Reports tab displays a list of expense reports. Each expense report has general information about it. Use this tab to view and manage all your expense reports that are not voided.

The expense reports listed on the Expense Reports tab are sorted by status with draft status first, then by date from newest to oldest for each status, and are displayed in summary view with the following details:

- **Description**: This is the description that was applied to the expense report when it was created.
- **Date**: This is the expense report date. This can be either a single date or a date range, depending on the expense report type configuration.
- **Total Amount**: This is the total amount of expenses claimed in the expense report.
- **Total to Me**: This is the total amount that will be reimbursed for the expense report.
- **Paid <Payment Date>**: This status indicates that the expense has already been paid by the company and includes the corresponding payment date. The **Paid** status displays **N/A** instead of a payment date when the amount is 0 and no payment is required.

  > Note: This information is displayed only when you tap an expense report on the Expense Reports screen. If the expense report has not been paid, the status will not be displayed.

- **Expense Report Number**: This is the expense report number assigned by Costpoint Time & Expense.
- **Expense Report Status**: This is the status of the expense report. Expense report statuses are color-coded.

Expense Report Sections

Each expense report entry has the default sections associated with it. Tapping each of these sections displays its respective screen.

- Details: Tap this section to display the Details screen, which you use to enter basic information for the expense report.
- Default Charges: Tap this section to display the Default Charges screen, which you use to enter specific charges to which the expense estimates will default.

Depending on your company's expense report type setup in Costpoint Time & Expense, the expense report may display additional sections.

- Location displays if **Track Locations** is enabled for the expense type. Use the Location screen to enter locations where expenses were incurred.
- **Outstanding Advances** displays if the expense type allows advances.
- **Overall Attachments** displays if there are receipts attached to the expense report.
- **Reason for Rejection** displays if the expense report status is **Rejected**. This section displays the reason for rejection entered on the Reason screen when a supervisor rejects an expense report.

Attention: For more information on these sections, see the related topics in "Basic Information" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report** > **The Expense Report Form**.

On the following screens, a button labeled **Company Guidelines** becomes available if custom text is configured in Costpoint Time & Expense (**Expense** > **Expense Controls** > **Expense Types or Expense Report** > **Custom Text Subtask**):

- Default Charges
- Location
- Expense Advances
- Expense Details
- Expense Report Details
- User-Directed Options (Expense Report Details)

Tapping the **Company Guidelines** button displays the customized screen description and instruction text for any of these expense report screens.

Attention: For more information on how to set up custom text, see Expense Wizard in "The Expense Report Form" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report**.

Expense Reports Tab Icons

The table below provides information on the items displayed on the Expense Reports tab.

Icon	Description
Search	Tap this icon to display the Search screen. Note: This icon displays only if you have Manage Approve Expense rights.
Filter Status	Tap this icon to filter the expense reports displayed on the Expense Reports tab by status. Attention: For more information, see Filter Expense Reports.
Add	Tap this icon to display the New Expense Report screen.
	Tap this icon to display the following options: ▪ **View Mine**: If you are logged into Costpoint Mobile T&E with a proxy user role, this option will be available. It is enabled when you are viewing other users' expense reports. Tap this option to refresh the Expense Reports screen with the list of your own expense reports. ▪ **View Others**: If you are logged into Costpoint Mobile T&E with a proxy user role, this option will be available. It is enabled when you are viewing your own expense reports. Tap this option to access and view expense reports for other users. When you tap **View Others**, the **Search Name** and **Search ID** fields are displayed on the Expense Reports screen, just below the Expense Reports and Outstanding Expenses tabs. Note: This option displays only if you are logged into Costpoint Mobile T&E with a proxy user role. ▪ **Help**: Tap this option to view the help topic for this screen. Attention: For more information on proxy users, see Mobile Expense Access for Proxy Users.

New Expense Report Screen

Use the New Expense Report screen to create a new expense report.

The New Expense Report screen displays when you tap on the Expense Reports screen, or when you choose to create a new report using the Capture Receipt feature.

By default, the New Expense Report screen contains two sections: **Details** and **Default Charges**. Tap the section to display its corresponding screen and perform detailed expense entry.

Note: Depending on your company's expense report type setup, the expense report may display additional sections.

Attention: For more information, see Expense Reports Listing.

New Expense Report Screen Items

The table below provides information on the items display on the New Expense Report screen.

Note: The following items also display when you tap an existing expense report on the Expense Report screen.

Item/Icon	Description
Details	Tap this section to display the Details screen.
Default Charges	Tap this section to display the Default Charges screen.
Submit	Tap **Submit** to submit the expense report for approval. Note: If there are no expenses attached to an expense report, this icon is disabled.
Add	Tap **Add** to display the Add Expense screen.
Delete	Tap **Delete** to delete a claimed expense line.
Save	Tap **Save** to save the expense report, send it to the Costpoint Time & Expense database, and assign it an expense report number.
	Tap this icon to display the following buttons: Note: This icon only displays if you tap an existing

Item/Icon	Description
	expense report. - **Void**: Tap this button to void an expense report. You can void an expense report based on the conditions allowed by your system administrator for your expense class. **Attention:** For more information, see Void an Expense Report in this guide and "Expense Classes" in the Costpoint Online Help under **Time & Expense > Expense > Expense Controls**. - **Correct**: Tap this button to correct a processed expense report. **Attention:** For more information, see Expense Report Correction and Correct a Processed Expense Report. - **Manage Favorites:** Tap this button to display the Manage Favorites screen. **Attention:** For more information, see Expense Reports-Manage Favorites.

Details Screen

Use the Details screen to enter basic information for the expense report.

Screen Fields

Attention: For more information on the New Expense Report screen fields, see "The Expense Report Form" in the Costpoint Online Help under **Time & Expense > Expense > Expense Reports > Expense Report**.

Field	Description
Date	This field defaults to the current date. To change the date, tap the calendar icon to display the date picker.
Type	Tap > to display the list of valid expense report types. From the list, tap the expense report type, where more than one type of is available to you. If there is only type available, it displays

Field	Description
	in the field by default.
Authorization	This field displays only if the selected expense report type has an authorization type. If approved expense authorizations are available, tap › to display the list, and tap the appropriate value.
Description	Tap this field and enter a short description of the expense report.
From	This field is blank by default. To change the date, tap the calendar icon to display the date picker. The date you specify in this field automatically displays in the **Start Date** field on the Location screen.
To	This field displays today's date. To change the date, tap the calendar icon to display the date picker. The date you specify in this field automatically displays in the **End Date** field on the Location screen.
Purpose	Tap and enter a description of the expense report. This field is required only if configured by expense report type.

Default Charges Screen

Use the Default Charges screen to enter the specific charges to which the claimed expense and percentage estimates default. Enter as many charge allocations as necessary and set up the default allocation percentage for each allocation.

Screen Fields

Attention: For more information on the New Expense Report screen fields, see "The Expense Report Form" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report**.

Field	Description
Charge Type	Tap this field to select the charge type used for the expense. The valid values are UDT01 and UDT02.
Charge	Tap this field to select the charge used for the expense.
Description	Tap this field to display the description of the charge. This field is not editable.
Add to Favorites	Tap **On/Off** to set it to **On** to automatically add the selected charge to **Favorites**. **Attention:** For more information, see Favorite and Autopopulate Fields.

Default Charges Screen for Subcontractors

The Default Charges screen displays the fields in the table below if you are logged in as a subcontractor.

Field	Description
Work Assignment ID	This field displays the work assignment ID associated with the expense charge.
Description	This field displays the work assignment description.
PO ID	This field displays the PO ID associated with the expense.
PO Line	This field displays the line number on the order.
Default Allocation %	This field displays the allocation percentage that was allotted to this charge.
ID	This field displays the numerical number that identifies the charge allocation.

Add a Default Charge

Use the Default Charges screen to add a default charge to the expense report.

To add a default charge:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. On the Expense Report screen, tap **Default Charges**.
5. On the Default Charges screen, tap **Add**.
6. On the Charge Lookup screen, tap **Favorites**, or tap **Lookup Charges**.

   If you tap **Lookup Charges**, tap the required fields, and search among the available values.

   a. To perform a search using a search type other than **Project ID**, tap the **Project ID** field and tap a search type.

      > **Note:** If you are logged in as a subcontractor, search is performed by **Work Assignment ID**.
      >
      > Search types are user-defined fields and their labels may change depending on your company's preferences.

   b. Enter a search string in the **Search String** field, and tap to perform the search.

   c. Tap a charge from the list.
7. If you tap **Favorites**, tap a charge from the list.

8. On the Default Charges screen, enter or specify the values in the appropriate fields, and tap **Done**.

   The new default charge is added to the list of available default charges on the Default Charges screen.

Delete a Default Charge

You can remove a default charge from an expense report by deleting it.

To delete a default charge:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. On the Expense Report screen, tap **Default Charges**.
5. On the Default Charges screen, tap next to the charge you want to delete.

   The check mark turns green after you tap it. You can tap one or multiple charges.
6. Tap **Delete**.
7. Tap **Yes** on the prompt to delete the charge.

   Costpoint Mobile T&E removes the charge and saves the changes.

   The deleted charge no longer displays on the Default Charges screen.

   > **Note:** Alternatively, you can remove a charge from the Favorites list on the Manage Favorites screen.

Location Screen

Use the Location screen to enter or view locations where expenses were incurred. The Location screen displays if **Track Locations** is enabled for the expense type in Costpoint Time & Expense.

Screen Fields

> **Attention:** For more information on the New Expense Report screen fields, see "The Expense Report Form" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report**.

Field	Description
Location	This field displays the location based on options specified in other fields. If no locations currently display, tap to display the Location dialog box, where you can tap **Favorites** to select a location from the Favorite Location list, or tap **Lookup** to search among available locations.

Field	Description
	If your system administrator has configured default locations for every expense type, the default location displays in the **Location** section. You can override the default by selecting a different location.
Start Date	This field defaults to the current date and displays the start date for this location. To change the date, tap the calendar icon to display the date picker.
End Date	This field displays the end date for this location. To change the date, tap the calendar icon to display the date picker.
Country	Tap this field to select the country.
State	Tap this field to select the state.
City	Tap this field to select the city.
Country	Tap this field to select the country.
Comments	Tap this field to add comments for the location.
Favorite	Tap **On** to add the selected location to your list of favorites. After it is added, it becomes available on the Favorite tab on the Location screen.
Edit Location	Tap this field to display the Location screen and edit the location details.
Per Diem Rates	Tap this field to display the per diem rates for the selected location.

Add a Location

Use the Location screen to add a new location and provide details about the location where you incurred expenses.

To add a location:

1. Tap , and then tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and then tap an expense report to open and edit.
4. On the Expense Report screen, tap **Location**.
5. On the Location screen, tap **Add**.
6. On the Location screen, tap **Favorite** or tap **Lookup**.

If you tap **Favorite**, tap a location from the list. If you tap **Lookup**, tap the required field, and search among the available values.

7. Tap **Apply Location**, and then tap **Done**.

   The new location is added to the list of available locations on the Location screen.

Delete a Location

You can delete a location that you previously added to an expense report.

To delete a location:

1. Tap , and then tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and then tap an expense report to open and edit.
4. On the Expense Report screen, tap **Location**.
5. On the Location screen, tap next to the location you want to delete.

   The check mark turns green after you tap it. You can tap one or multiple locations.

6. Tap **Delete**.
7. Tap **Yes** on the prompt to delete the location.

   Costpoint Mobile T&E removes the location and saves the changes.

   The deleted location no longer displays on the Location screen.

Edit a Location

Use the Location screen to edit the details of the location where you incurred expenses.

To edit a location:

1. Tap , and then tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and then tap an expense report to open and edit.
4. On the Expense Report screen, tap **Location**.
5. On the Location screen, tap the location you want to open and edit.
6. Tap **Edit Location**.

7. Enter or specify the values in the appropriate fields, and then tap **Apply Location**.
8. Tap **Done**.

Expense Details Screen

Use the Expense Details screen to enter required and optional information about the expense.

The fields that display on the Expense Details screen depend on the type and category of expense you selected.

Examples of expense types include:

- Airfare
- Rail
- Car Rental
- M&IE
- Meals
- Mileage
- Parking
- Per Diem Lodging
- Non-Per Diem Lodging
- Cell Phone
- Office Supplies
- Entertainment

This table provides information on the default fields on the Expense Details screen.

Field	Description
Expense Type	Use this field to select the expense type.
Expense Date	Use this field to select the date for the expense.
Expense Incurred	Use this field to enter the full amount of the expense.

Attention: For more information about the fields for a specific expense type, see "Expense Details Tab" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report** > **The Expense Report Form** > **Expenses Section** > **Expenses Tab**.

Depending on your company's expense report type setup in Costpoint Time & Expense, the Expense Details screen may display additional sections such as:

- **Charge Allocations Under Ceiling**
- **Attachments**

- Per Diem Rates
- Meals

> **Note:** If your expense class is configured for multi-day per diem ceiling meal expense entry in Costpoint Time & Expense, tapping **Meals** displays the Multi-Day Meals screen, which you can use to enter or edit per diem ceiling meal expenses for multiple days.

Expense Report Tasks

These are the procedures you can perform on expense reports.

Add a New Expense Report

Use the New Expense Report screen to create a new expense report.

To add a new expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Tap **Add**.
4. On the New Expense Report screen, perform the following:
   - Tap **Details**, enter or specify the values in the appropriate fields, and tap **Done**.
   - Tap **Default Charges**, enter or specify the values in the appropriate fields, and tap **Done**.

   > **Note:** Depending on your company's expense report type setup, the Expense Report may display additional sections.
   > For example:
   > - **Outstanding Advances** displays if the expense type allows advances.
   > - **Location** displays if **Track Locations** is enabled for the expense type.
   > - **Overall Attachments** displays if receipts can be attached to the expense report.
   >
   > Enter or specify the values in the appropriate fields in each section, and tap **Done**.
5. Tap .

   The new expense report is added to the list of expense reports on the Expense Reports screen.

   > **Attention:** For more information, see "Add Expense Reports" in Guides and Videos.

Add a Claimed Expense to an Expense Report

Use the Expense Details screen to add a claimed expense to an existing expense report.

To add a claimed expense to an expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. On the Expense Report screen, tap **Add**.
5. On the Expense Details screen, tap **Expense Type**, and then tap the expense that you want to add.

   Depending on the expense report type setting, you may see the **Category** field on the Expense Details screen. Tap **Category** first, the tap the appropriate value, and tap **Expense Type**.
6. If there are outstanding expenses available for the selected expense type, Costpoint Mobile T&E displays the **Outstanding Expenses** field and allows you to select an outstanding expense to claim.

   Tap the field, and tap an outstanding expense from the list based on the date range of your expense report.
7. Scroll down to the bottom of the Expense Details screen, and make sure that all required fields are filled out.
8. Tap **Save**.

   If there is a problem with the expense report, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to save the expense report.

   The claimed expense line is added to the expense report.

Edit an Expense Report

You can modify an existing expense report's section, such as **Details**, **Location**, and **Default Charges**.. You can also add a claimed expense to an expense report.

To edit an existing expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. Tap the corresponding section (**Details**, **Location**, or **Default Charges**) to edit and make the appropriate changes to the fields.
5. Tap **Done**.
6. Tap **Save**.
7. To add a claimed expense, tap **Add** on the Expense Report screen.
8. On the Expense Details screen, enter or specify the values in the appropriate fields.
9. Tap **Save**.

The claimed expense line is added to the expense report.

Attaching a Receipt

You can attach a receipt to an expense report by using Capture Receipt or by capturing or selecting an image of the receipt and associating it with the Overall Attachments section of an expense report or to a claimed expense line of an expense report.

Attach a Receipt Using Capture Receipt with ICR Enabled

Use Capture Receipt to capture or select an image of a receipt and create an expense entry. You can use the expense entry to create a new expense report or to attach it to an existing expense report.

To attach a receipt using Capture Receipt:

1. Tap , and tap **Capture Receipt**.

   > **Note:** Costpoint Mobile T&E prompts you to allow access to your camera and photo gallery. Tap **Allow** to use the ICR feature.
   >
   > If you are using an iOS device, you must tap **Allow Access to All Photos** to use the ICR feature. Otherwise, you will receive the **Gallery access required** notification when the application tries to access the photo gallery.
   >
   > Gallery files must be local to be accessed via Google Photos and must be downloaded to the device. You will get the “Image path is not valid” notification if the image is not local on the device and you try to choose it via Google Photos.

2. Perform one of the following:
   - Focus your device’s camera on the receipt, and tap the device’s default camera button.
   - Tap  to select an existing image from the camera gallery.
3. Perform any of the following on the captured or selected image:
   - Tap  to crop the image.
   - Tap  to rotate the image.
   - Tap  to delete the image.

     > **Note:** You can either take another photo or cancel adding of images.

   - Tap  to capture or select another image and stitch additional pages of a receipt.

Note: The stitch functionality is not intended for different unique receipts.

- Tap ◀ if you want to discard the previous image and capture a new one.

4. Tap **Submit** when you are ready to submit the image.
5. On the Add Expense screen, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the screen, and populates the matched fields. If ICR is disabled, enter or specify the values in the appropriate fields.

   Attention: For more information on the populated/mapped fields during Capture Receipt, see "My Outstanding Expenses" in the Costpoint Online Help under **Time & Expense > Expense > Expense Reports**.

6. Tap **Save Receipt** to add the expense as an outstanding expense or tap **Save to Expense Report** to add the expense entry to an existing expense report or to create a new expense report using the expense entry.

   Note: If there is already a duplicate of the captured receipt in the database, Costpoint Mobile T&E notifies you and provides options on how to proceed, depending on whether or not the existing duplicate is a claimed expense. For more information, see Managing Duplicate Outstanding Expenses When Capturing Expenses.

7. To add the expense entry to an existing expense report, perform the following steps:
   a. Tap **Save to Expense Report**.
   b. On the Expense Report Options screen, tap **Choose Existing Report**.
   c. On the Expense Reports screen, tap an existing expense report to which you want to attach the expense entry.
   d. Tap ➕ **Add**.
   e. On the Expense Details screen, tap **Expense Type**, and tap the type of the expense you captured.

      Costpoint Mobile T&E populates the matched fields from the expense entry. Enter or modify the values in the fields.
   f. Tap 💾 **Save**.

      The expense entry is added to the expense report.

      The **Attachments** button displays at the bottom of the screen if the expense contained an attachment and the task to add an attachment at the expense level is set up for the Expense report type and the Expense type. If the tasks are not set up, this button is hidden and the attachment is only saved to the database attachments location. Contact your Costpoint Administrator if you have questions about this functionality.

      Attention: For more information, see "Set up a Task at the Expense Level Both for the Expense Report Type and Expense Type" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

If there is a problem with the expense report you are saving, Costpoint Mobile T&E displays a corresponding error or warning indicator to help you easily identify the data fields that you need to address.

> **Note:** When the **Use Quick Entry for Capture** field on the Settings screen is set to **On**, tapping **Choose Existing Report** displays the Quick Entry Expense screen, where you can tap an existing quick entry expense report in the list and attach the receipt you captured.

8. To create a new expense report using the expense entry:
   a. Tap **Save to Expense Report**.
   b. On the Expense Report Option screen, tap **Create New Report**.

   The New Expense Report screen displays.
   Perform any of the following:
   - Add a New Expense Report
   - Add a Claimed Expense to an Expense Report

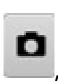
   > **Attention:** For more information, see "Capture Outstanding Expenses" in Guides and Videos.

   > **Note:** When the **Use Quick Entry for Capture** field on the Settings screen is set to **On**, tapping **Create New Report** displays the New Quick Entry screen and attach the receipt you captured.

Attach a Receipt to the Overall Attachments Section of an Expense Report

You can attach a receipt to an existing expense report through the Overall Attachments section.

To attach a receipt to the Overall Attachments section of an expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. Tap **Overall Attachments**, and tap the attachment type (for example, PDF.)
5. Tap , and perform one of the following:
   - Focus your device's camera on the receipt, and tap the device's default camera button.
   - Tap  to select an existing image from the camera gallery.
6. Perform any of the following on the captured or selected image:
   - Tap  to crop the image.
   - Tap  to rotate the image.

- Tap to delete the image.

  Note: You can either take another photo or cancel adding of images.

- Tap to capture or select another image and stitch additional pages of a receipt.

  Note: The stitch functionality is not intended for different unique receipts.

- Tap if you want to discard the previous image and capture a new one.

7. Tap **Submit** when you are ready to submit the image.
8. Tap **Done**.

Attach a Receipt to the Claimed Expense Line of an Expense Report

Use the Attachments section of an expense report to attach a receipt to a claimed expense line.

To attach a receipt to a claimed expense line of an expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. Tap a claimed expense.
5. On the Expense Details screen, tap **Attachments**.
6. On the Attachments screen, tap an attachment type (for example, PDF.)
7. Tap , and perform one of the following:
   - Focus your device's camera on the receipt, and tap the device's default camera button.
   - Tap to select an existing image from the camera gallery.
8. Perform any of the following on the captured or selected image:
   - Tap to crop the image.
   - Tap to rotate the image.
   - Tap to delete the image.

     Note: You can either take another photo or cancel adding of images.

   - Tap to capture or select another image and stitch additional pages of a receipt.

> **Note:** The stitch functionality is not intended for different unique receipts.

- Tap if you want to discard the previous image and capture a new one.

9. Tap **Submit** when you are ready to submit the image.

The new attachment is added to the attachment list on the Attachments screen.

Attach a Receipt to an Attachment Type Marked as Missing

You can attach a receipt to an expense report or a claimed expense line with an attachment type marked as **Missing**.

To attach a receipt to an attachment type marked as Missing:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, tap an expense report to open and edit, and perform one of the following:
   - Tap a claimed expense and tap **Attachments**.
   - Tap **Overall Attachments**.
4. On the Attachments screen or Overall Attachments screen, tap the check mark next to the attachment marked as **Missing**.

   The check mark turns green after you tap it.
5. At the bottom of the screen, tap the **Remove Missing** button.
6. Tap the same attachment, and tap **Capture** to capture or select an image to attach.
7. Tap **Done**.

Delete a Claimed Expense from an Expense Report

You can remove a claimed expense line from an expense report by deleting it.

To delete a claimed expense line from an expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report.
4. Tap next to the claimed expense line you want to delete.

The check mark turns green after you tap it. You can tap one or multiple claimed expense lines.

5. Tap **Delete**.
6. Tap **Yes** on the prompt to delete the expense and attachment.

   Costpoint Mobile T&E removes the claimed expense line from the expense report and saves it.

   The deleted claimed expense line no longer displays on the Expense Report screen. If the deleted claimed expense is used as an outstanding expense, the entry displays on the Outstanding Expenses tab.

Edit Expense Details

Use the Details screen to update expense details.

To edit the expense details:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. Tap **Details**.
5. On the Expense Details screen, update the necessary fields.
6. Tap **Done**.

Submitting an Expense Report for Approval

Depending on your company's setup, Costpoint Mobile T&E may display additional screens that you need to complete before you can submit the expense report for approval.

- The Attachments screen displays if there is an issue with the required attachments. Depending on the warning or error, you may need to review the receipts already attached to the expense report and/or to the claimed expense lines, add additional receipts, or mark items as missing. You must complete all required attachments before you can proceed to the next step.
- The User Directed Workflow screens (Review and Approve screens) display if you are required to assign approvers to review and approve the expense report. You must tap approver from the list and tap **Assign** before you can proceed to the next step.
- The Company Due screen displays if there is an amount due to the company. You must specify or select values in the **Amount** and **Type** fields before you can proceed to the next step.
- On the Certification screen, tap I agree. Make sure that all required expense details and attachments are included in the expense report based on the expense report type. If there is a problem with the expense report you are signing, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to sign the expense report.

Submit an Expense Report for Approval (on the Expense Reports Screen)

Once your expense report is complete, you can submit it for approval.

To submit an expense report for approval:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab, and tap the expense report that you want to sign and submit for approval.
3. On the Expense Report screen, tap **Submit**.
4. Costpoint Mobile T&E may display additional screens that you need to complete before you can submit the expense report for approval. Complete the appropriate screen first, and tap **Next** to move to the next screen.
5. Once you have completed each screen, tap **Done**.
6. On the Certification screen, tap **I agree**.

   Make sure that all required expense details and attachments are included in the expense report based on the expense report type. If there is a problem with the expense report, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to submit the expense report.

   Costpoint Mobile T&E saves your changes and displays the expense report. The expense report status is changed to **Submitted**.

   The Approve Expense Reports indicator on the Tasks screen of the supervisor is automatically updated to reflect the submitted expense report.

View the Expense Report List

The expense reports listed on the Expense Reports tab are sorted by date for each status in summary view. Tap an expense report to view its details.

To view expense report list:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list to view the expense reports, which are color-coded based on their status.

   Note: To refresh the list, pull the screen down (swipe your finger from the top of the screen downwards).
4. Tap an expense report to view its details.
5. To remove expense reports with specific status from the list, tap **Filter**, and tap the slider next to the status you want to remove.

Void an Expense Report

You can void an expense report regardless of the status if the expense class allows it. Once you void an expense report, any expense authorizations attached to it are updated to an approved status and become available for use with a new expense report.

Attention: For more information, see New Expense Report Screen.

To void an expense report:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list, and tap an expense report to void.
4. On the Expense Report screen, tap , and tap **Void**.
5. Enter a note to explain why you want to void the expense report.
6. Tap **Done**.

   The voided expense report no longer displays on the Expense Report screen.

Expense Report-Manage Favorites

Use the Manage Favorites screen to easily manage your expense charge favorites on a mobile device.

To display the Manage Favorites screen, tap an existing expense report to display the Expense Report screen, tap , and tap **Manage Favorites**.

To delete a favorite expense charge, swipe the row either to the left or right, and tap the delete icon.

Attention: For more information, see "Charge Favorites Subtask" in the Costpoint Online Help under **Time & Expense > Expense > Expense Authorizations > The Expense Authorization Form > Subtasks**.

Add a Default Charge to Favorites

After you add a default charge to the Favorites list, it becomes available on the Favorites tab on the Charge Lookup screen.

To add a default charge to Favorites:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.

3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. On the Expense Report screen, tap **Default Charges**.
5. On the Default Charges screen, tap **Add**.
6. On the Charge Lookup screen, tap **Lookup Charges**.
   a. To perform a search using a search type other than **Project ID**, tap the **Project ID** field, and tap a search type.

      Note: If you are logged in as a subcontractor, search is performed by **Work Assignment ID**.

      Search types are user-defined fields and their labels may change depending on your company's preferences.

   b. Enter a search string in the **Search String** field, and tap to perform the search.
   c. Tap a charge from the list.
7. On the Default Charges screen, tap **On/Off** in the **Add to Favorites** field to set it to **On**.
8. Tap **Done**.

Expense Report Status

The expense report status determines which processing options are available to you.

Field	Description
Draft	This status indicates that the expense report is in process. It has not yet been submitted.
Submitted	This status indicates that the expense report has been signed but not yet approved by the supervisor.
Under Review	This status indicates that the expense report was signed, and it requires more than one approval, of which at least one has been completed.
Approved	This status indicates that the expense report has been approved by the supervisor but has not been processed.
Rejected	This status indicates that the expense report was signed but was rejected by the supervisor. Note: When you reject an expense report, the user receives a notification of the rejection, and the reason for rejection displays in the Reason for Rejection section of the expense report.
Processed	This status indicates that the expense report has been successfully exported.

Filter Expense Reports

You can limit the expense reports displayed on the Expense Reports screen by filtering their statuses.

To filter expense reports:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Tap **Filter** to display the Show the following statuses screen.
4. Tap **Off** to hide expense report entries with this specific status on the Expense Reports screen.

   By default, all expense report statuses are set to **On**.

   Note: For more information on the status, see Expense Report Status.
5. Tap **Apply** to save your changes.

   On the Expense Reports screen, the filter icon changes to yellow, which indicates that filters are applied.

   Note: Tap **Reset** to go back to the Expense Reports screen.

Expense Report Search

As a supervisor or a backup supervisor, you can view all expense reports of your group, regardless of the status, and perform expense reports approval using the Search screen. The search feature is available if you have rights to view or approve other users' expense reports (Manage Approve Expense).

Contents

Field	Description
Function	Tap this field to select the user's functional role. This field defaults to the user's role that takes precedence over other users.
Group	Tap this field to select the user's group.
Type	Tap this field to display the list expense type, and then tap a value from the list.
Filter	Tap this field to search by **Expense Report ID** or **Last Name**.
Filter Value	Tap this field to enter a value based on the filter you selected.
Start Date	Tap this field to display the calendar picker and specify the start date of your search to narrow your search results.

Field	Description
End Date	Tap this field to display the calendar picker and specify the end date of your search to narrow your search results.
Expense Report Status	Tap the status of the expense report that you want to search. ▪ Draft ▪ Submitted ▪ Under Review ▪ Approved ▪ Rejected ▪ Processed **Note:** Tap at least one expense report status to perform a search.

Search Expense Reports

You must specify the required fields on the Search screen to perform a search, select an expense report from the list, and perform the appropriate task such as approving an expense report.

To search expense reports:

1. Tap , and tap **Expense Reports**.
2. Tap the Expense Reports tab, and tap **Search**.
3. On the Search screen, tap the fields and values to use for your search, and tap .

   The application displays the expense reports that match the criteria you specify.
4. On the Search screen, tap the check mark next to the expense report that you want to view.

   You can tap one or more expense reports. If you want to select all expense reports in the list, tap **Select All**.
5. Tap **Review**.

   The Review Reports screen displays the expense report you selected.
6. Tap the appropriate section (**Details**, **Default Charges**, or **Location**) to view its details.
7. Approve or reject the expense report.
   - To approve an expense report:
     - Tap .
     - Tap , and tap **Approve**.

- To reject an expense report, tap ⋮, and tap **Reject**.

8. If you selected multiple expense reports to view, tap ▶ to display the next expense report or ◀ to display the previous expense report.

Expense Report Correction

You can modify expense reports that have already been processed in Costpoint Time & Expense based on permissions set by your system administrator for your Expense Group Class and functional role rights.

If the expense report status is **Processed**, the **Correct** button on the expense report is enabled. Tap the **Correct** button to change the expense report status from **Processed** to **Approved**, and modify the expense report as needed.

Attention: For more information, see Correct a Processed Expense Report in this guide and "Corrected Expense Reports" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report** > **Expense Report Concepts**.

Correct a Processed Expense Report

You can modify expense reports that have already been processed in Costpoint Time & Expense based on permissions set by your system administrator for your expense class or functional role.

Attention: For more information, see Expense Report Correction and New Expense Report Screen.

To correct an expense report:

1. Tap ☰, and tap **Expense Reports**.
2. Tap the Expense Reports tab.
3. Scroll through the list, and then tap a processed expense report to modify.

   Note: You can filter the list to display only expense reports with **Processed** status by tapping **Filter**.

   Attention: For more information, see Filter Expense Reports.

4. On the Expense Report screen, tap ⋮, and tap **Correct**.

   Costpoint Mobile T&E displays a message indicating that the expense report is now available for correcting.
5. Tap **Close**.

   The expense report status is changed to **Approved**.

6. Modify the expense report, and tap **Save**.

   If there is a problem with the expense report you are saving, Costpoint Mobile T&E displays errors and warnings. You must resolve the errors first in order to save the expense report.

7. On the Revision Explanation screen, enter or search for the revision explanation code or enter a note to explain the revision made, and tap **Done**.

   Costpoint Mobile T&E displays that the expense report is saved.

Outstanding Expenses

Outstanding expenses are expenses imported from a credit card feed, created through Capture Receipt, or manually entered as an expense, and are not yet claimed on an expense report.

Use the Outstanding Expense tab to view and manage your outstanding expenses as well as duplicate outstanding expenses.

The Outstanding Expenses tab contains two sub-tabs.

- **All**: This tab displays a list of all your outstanding expenses.
- **Duplicates**: This tab displays a list of outstanding expenses flagged as duplicates. This tab is hidden if there are no duplicate outstanding expenses.

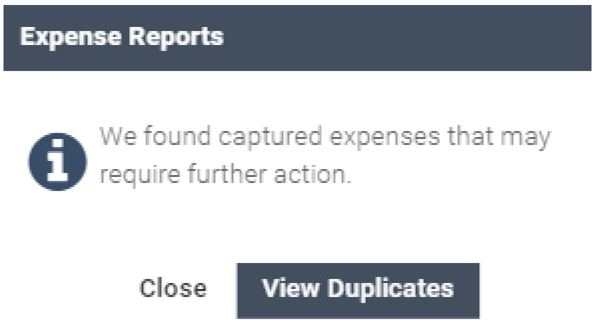
> **Note:** Tap , and tap **Help** to view the help topic for this screen.

Managing Duplicate Outstanding Expenses

Importing credit card expenses, capturing expense receipts, and manually adding expenses can potentially create duplicate outstanding expenses. You can use Costpoint Mobile T&E to manage duplicate outstanding expenses on a mobile device.

> **Note:** This feature is available if you are using Costpoint 8.1.15 or later and 8.2.x. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

When you navigate to the Expense Reports screen and there are duplicate outstanding expenses in the database, Costpoint Mobile T&E displays a notification on the screen.



Tapping **View Duplicates** displays the Outstanding Expenses-Duplicates tab, which contains a list of outstanding expenses that have been found to be duplicates of other outstanding expenses.

Note: To hide an outstanding expense, tap next to the outstanding expense you want to hide, and tap **Hide**.

Attention: For more information, see Hide an Outstanding Expense.

Each entry displays the date, amount, currency code, and merchant of each expense. An expense with a credit card icon next to it denotes that it is imported from a credit card feed. An expense with no credit card icon denotes that it is manually entered.

Tapping a duplicate outstanding expense entry displays the Duplicate Expenses screen, with all the duplicates of the selected outstanding expense listed.

The table below provides information on the buttons available on the Duplicate Expenses screen.

Button	Description
Combine Duplicates	Tap this button to combine all duplicate outstanding expenses. The following rules apply when combining duplicates: ▪ If you are combining an expense imported from a credit card feed and an expense manually entered, the expense imported is retained while the expense manually entered is deleted, but its comments and attachments are added to the expense imported. ▪ If you are combining manually entered expenses, the oldest expense is retained while other expenses are deleted, but their comments and attachments are added to the oldest expense.
Cancel	Tap this button to return to the Expense screen.

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Button	Description
	Alternatively, tap .

Managing Duplicate Outstanding Expenses When Capturing Expenses

When capturing expenses (using Capture Receipt), Costpoint Mobile T&E checks the date and the amount entered for the captured expense, whether you tap **Save Receipt** or **Save to Expense Report** on the Add Expense screen.

Attention: For more information, see Attach a Receipt Using Capture Receipt with ICR Enabled and Add Expense Screen.

If a duplicate of the captured expense already exists and it is not yet claimed, Costpoint Mobile T&E displays a message with the following options:

- **Combine**: Tap this option to add the captured expense to the existing duplicate outstanding expense. If there are multiple entries of the existing duplicate in the database, the captured expense is added to the oldest existing duplicate.
- **Create New**: Tap this option to save the captured expense and add it to the Outstanding Expenses tab.
- **Cancel**: Tap this option to cancel the capturing of the expense and return to the Outstanding Expenses tab.

If a duplicate of the captured expense already exists and it is already claimed, Costpoint Mobile T&E displays a message with the following options:

- **Create New**: Tap this option to save the captured expense and add it to the Outstanding Expenses tab.
- **Cancel**: Tap this option to cancel the capturing of the expense and return to the Outstanding Expenses tab

Adding an Outstanding Expense to an Existing Expense Report

There are two ways to add an outstanding expense to an existing expense report: using Capture Receipt and using the Outstanding Expense section of the Expense Details screen.

Attention: For more information, see "Capture Outstanding Expenses" in Guides and Videos.

Add an Outstanding Expense to an Expense Report Using Capture Receipt

Use Capture Receipt to attach an outstanding expense to an expense report.

To add an outstanding expense to an expense report using Capture Receipt:

1. Tap , and tap **Capture Receipt**.

   > **Note:** Costpoint Mobile T&E prompts you to allow access to your camera and photo gallery. Tap **Allow** to use the ICR feature.
   >
   > If you are using an iOS device, you must tap **Allow Access to All Photos** to use the ICR feature. Otherwise, you will receive the **Gallery access required** notification when the application tries to access the photo gallery.
   >
   > Gallery files must be local to be accessed via Google Photos and must be downloaded to the device. You will get the “Image path is not valid” notification if the image is not local on the device and you try to choose it via Google Photos.

2. Perform one of the following:
   - Focus your device’s camera on the receipt, and tap the device’s default camera button.
   - Tap to select an existing image from the camera gallery.
3. Perform any of the following on the captured or selected image:
   - Tap to crop the image.
   - Tap to rotate the image.
   - Tap to delete the image.

     > **Note:** You can either take another photo or cancel adding of images.

   - Tap to capture or select another image and stitch additional pages of a receipt.

     > **Note:** The stitch functionality is not intended for different unique receipts.

   - Tap if you want to discard the previous image and capture a new one.
4. Tap **Submit** when you are ready to submit the image.
5. On the Add Expense screen, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the screen, and populates the matched fields. If ICR is disabled, enter or specify the values in the appropriate fields.

   > **Attention:** For more information on the populated/mapped fields during Capture Receipt, see "My Outstanding Expenses" in the Costpoint Online Help under **Time & Expense > Expense > Expense Reports**.

6. Tap **Save to Expense Report**.

   Costpoint Mobile T&E displays that the outstanding expense is added.

> **Note:** If there is already a duplicate of the captured receipt in the database, Costpoint Mobile T&E notifies you and provides options on how to proceed, depending on whether the existing duplicate is a claimed expense or not. For more information, see Managing Duplicate Outstanding Expenses When Capturing Expenses.

a. On the Expense Report Options screen, tap **Choose Existing Report**.

b. On the Expense Reports screen, tap an existing expense report to which you want to attach the expense entry.

c. Tap **Add**.

d. On the Expense Details screen, tap **Expense Type**, and tap the type of the expense you captured.

   Costpoint Mobile T&E populates the matched fields from the expense entry. Enter or modify the values in the fields.

e. Tap **Save**.

   The expense entry is added to the expense report.

   The **Attachments** button displays at the bottom of the screen if the expense contained an attachment and the task to add an attachment at the expense level is set up for the Expense report type and the Expense type. If the tasks are not set up, this button is hidden and the attachment is only saved to the database attachments location. Contact your Costpoint Administrator if you have questions about this functionality.

   > **Attention:** For more information, see "Set up a Task at the Expense Level Both for the Expense Report Type and Expense Type" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.

   If there is a problem with the expense report you are saving, Costpoint Mobile T&E displays a corresponding error or warning indicator to help you easily identify the data fields that you need to address.

   > **Note:** When the **Use Quick Entry for Capture** field on the Settings screen is set to **On**, tapping **Choose Existing Report** displays the Quick Entry Expense screen, where you can tap an existing quick entry expense report in the list and attach the receipt you captured.

Add an Outstanding Expense Using the Expense Details Screen

You can add an outstanding expense to an existing expense report using the Outstanding Expense section of the Expense Details screen if the selected expense type has outstanding expenses.

To add an outstanding expense to an expense report using the Expense Details screen:

1. Tap , and tap **Expense Reports**.

2. Tap the Expense Reports tab.
3. Scroll through the list of expense reports, and tap an expense report to open and edit.
4. Tap **Add** to add a claimed expense.
5. On the Expense Details screen, tap the **Expense Type** field, and tap the expense type to which you want to add an outstanding expense.
6. Tap the **Outstanding Expense** field.

   The Outstanding Expense screen displays a list of outstanding expenses that matches the specified expense type.
7. Tap an outstanding expense based on the date range of your expense report.
8. On the Expense Details screen, Costpoint Mobile T&E populates the matched fields from the outstanding expense. Enter or modify the values in the fields.
9. Tap **Save**.

   The outstanding expense is added to the expense report.

   The Attachments button displays at the bottom of the screen if the expense contained an attachment and the task to add an attachment at the expense level is set up for the Expense report type and the Expense type. If the tasks are not set up, this button is hidden, and the attachment is only saved to the database attachments location. Contact your Costpoint Administrator if you have questions about this functionality.

   > **Attention:** For more information, see "Set up a Task at the Expense Level Both for the Expense Report Type and Expense Type" section in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*

View and Edit Outstanding Expense Details

You can modify the details of an existing outstanding expense and attach a new receipt to it.

To view and edit outstanding expense details:

1. Tap , and tap **Expense Reports**.
2. Tap the Outstanding Expenses tab.
3. Scroll through the list of outstanding expenses.

   > **Note:** To refresh the list, pull the screen down (swipe your finger from the top of the screen downwards).
4. Tap an outstanding expense to view its details.
5. On the Expense Details screen, tap the corresponding field to edit, and make the appropriate changes to it.
6. Tap **Images Attached** to attach a new receipt to the outstanding expense .
7. On the Attachments screen, tap , and perform one of the following:

- Focus your device's camera on the receipt, and tap the device's default camera button.
- Tap to select an existing image from the camera gallery.

8. Perform any of the following on the captured or selected image:
   - Tap to crop the image.
   - Tap to rotate the image.
   - Tap to delete the image.

   Note: You can either take another photo or cancel adding of images.

   - Tap to capture or select another image and stitch additional pages of a receipt.

   Note: The stitch functionality is not intended for different unique receipts.

   - Tap if you want to discard the previous image and capture a new one.
9. Tap **Submit** when you are ready to submit the image.
10. To delete an attachment, perform the following:
    a. On the Attachments screen, tap next to the attachment you want to delete. The check mark turns green after you tap it. You can tap one or multiple attachments.
    b. Tap **Delete**.
11. On the Expense Details screen, tap **Save**.

Hide an Outstanding Expense

You can hide outstanding expenses displayed on the Outstanding Expenses tab if you will not ever claim it. For example, a personal expense is imported from a credit card feed.

To hide an outstanding expense:

1. Tap , and tap **Expense Reports**.
2. Tap the Outstanding Expenses tab.
3. Scroll through the list of outstanding expenses.
4. Tap next to the outstanding expense you want to hide.

   The check mark turns green after you tap it. You can tap one or multiple outstanding expenses.

5. Tap **Hide**.

   The outstanding expense no longer displays on the Outstanding Expenses tab.

   > **Note:** 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.

Delete an Outstanding Expense

You can delete an outstanding expense on the Outstanding Expenses tab only if it is manually entered.

To delete an outstanding expense:

1. Tap , and tap **Expense Reports**.
2. Tap the Outstanding Expenses tab.
3. Scroll through the list of outstanding expenses.
4. Swipe the outstanding expense that you want to delete, and tap **Delete**.

   The outstanding expense no longer displays on the Outstanding Expenses tab.

Quick Entry Expense

The Quick Entry Expense screen displays a list of quick entry expense reports and enables you to create simplified expense reports on a mobile device.

The **Quick Entry Expense** icon is displayed on the Costpoint Mobile T&E menu if:

- You are using Costpoint version 2025.2.1 or later.

  > **Note:** To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

- The **Allow Quick Entry Expense Report** option on the Basic Information tab of the Expense Classes screen in Costpoint Time & Expense is selected.

> **Attention:** For more information on how to configure this feature, see "Quick Entry Expense Report" in the Costpoint Online Help under **Time & Expense > Expense > Expense Reports**. In addition to the online help, also see the Quick Entry Expense Report Infographic.

The table below provides information on the items displayed on the Quick Entry Expense screen.

Icon	Description
Filter Status	Tap this icon to display the Quick Expense Report Filters screen, which allows you to filter the quick entry expense reports displayed on the Quick Entry Expense screen by status and date range. Attention: For more information, see Filter Quick Entry Expense Reports. Note: Quick entry expense report statuses are the same as those of standard expense reports. For more information, see Expense Report Status.
Add	Tap this icon to display the New Quick Entry screen.
	Tap this icon to display the following options: - **Delete Expense(s)**: Tap this icon to enable the deletion of quick expense reports with **Draft** status. To proceed with the deletion, select the **Allow User to Delete Quick Entry Expense Reports in Void or Draft Status** option on the Miscellaneous tab of the Expense Settings screen in Costpoint Time & Expense. Otherwise, the application will display the following message: "Delete unavailable based on Expense Setting." Attention: For more information, see Delete a Quick Entry Expense Report. - **Help**: Tap this option to view the help topic for this screen.

When the **Use Quick Entry for Capture** field on the Settings screen is set to **On** and you use the Capture Receipt feature, Costpoint Mobile T&E will add new receipts to the quick entry expense report by default instead of the standard expense report.

New Quick Entry/Edit Quick Entry Screen

Use the New Quick Entry screen or the Edit Quick Entry screen to create or edit a simplified expense report.

The New Quick Entry screen displays when you tap **Add** on the Quick Entry Expense screen. The Edit Quick

Entry screen displays when you tap an existing quick entry expense report in the list.

Screen Fields

Attention: For more information on the New Quick Entry/Edit Quick Entry screen fields, see "Contents of the Quick Entry Expense Report Screen" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Quick Entry Expense Report**.

Field	Description
Report ID	This field displays the expense report number assigned by Costpoint Time & Expense.
Date	This field automatically displays the date.
Type	Tap this field to select an expense type available for the expense class.
Description	Tap this field to enter an identifying description for the quick entry expense report.
Total	This field displays the total amount of claimed expenses in the quick entry expense report.
Total To Me	This field displays the total amount that will be reimbursed for the quick entry expense report.
Status	This field displays the status of the quick entry expense report.

Icons

Icon	Description
Submit	Tap this icon to submit your completed quick entry expense report for approval. **Attention:** For more information, see Submitting an Expense Report for Approval.
Add Expense	Tap this icon to add either a new expense or an unclaimed expense to the quick entry expense report. ▪ **Create from Unclaimed:** Tap this option to add an unclaimed expense to the quick entry expense report. ▪ **Create New Expense:** Tap this option to add a new expense to the quick entry expense report.
Delete	Tap this icon to delete the expense.
Save	Tap this icon to save the quick entry expense report.

Icon	Description
	Tap this icon to display the Manage Favorites screen.

Expense Report Sections

Depending on your company's expense report type setup in Costpoint Time & Expense, the New Quick Entry and Edit Quick Entry screens may display additional sections. The fields displayed will vary based on how your expense report is configured in Costpoint Time & Expense.

- The Location section displays if **Track Locations** is enabled for the expense type. Use the Location screen to enter locations where expenses were incurred.
- The **Overall Attachments** section displays if there are attachments to the expense report. This section indicates the number of attachments, as well as the number of missing attachments.
- The **Additional** section displays when the expense report type is configured for expense authorizations. Use the Additional screen to link an expense authorization and enter user-defined field information.

Quick Entry Expense-Manage Favorites

Use the Manage Favorites screen to easily manage your expense charge favorites on a mobile device.

To display the Manage Favorites screen, either tap **Add** or tap an existing quick entry expense report on the Quick Entry screen and then tap > **Manage Favorites**.

To delete a favorite expense charge, swipe the row either to the left or right and tap the delete icon.

Attention: For more information on how to add a charge to favorites, see Add a Charge to Favorites (Quick Entry Expense).

Quick Entry Expense Screen

Use the Quick Entry Expense screen to add either a new expense or an unclaimed expense to the quick entry expense report.

The fields displayed on the Quick Entry Expense screen vary based on the selected type and category of expense, allowing you to enter both required and optional information.

Example of expense types include:

- Airfare
- Rail

- Car Rental
- M&IE
- Meals
- Mileage
- Parking
- Per Diem Lodging
- Non-Per Diem Lodging
- Cell Phone
- Office Supplies
- Entertainment

Attention: For more information about the fields for a specific expense type, see "Expense Details Tab" in the Costpoint Online Help under **Time & Expense** > **Expense** > **Expense Reports** > **Expense Report** > **The Expense Report Form** > **Expenses Section** > **Expenses Tab**.

Depending on your company's expense report type setup in Costpoint Time & Expense, the Quick Entry Expense screen may display additional sections such as:

- **Attachments**: Tap this section to display the Attachments screen, where you can add, edit, or delete attachments to the expense report.
- **Split Expense**: Tap this section to open the Split Expense screen, where you can allocate charges by amount or percentage. This section is displayed only when a charge is assigned to multiple projects.
  You can also add a charge to your favorites using the Split Expense screen.

  Attention: For more information, see Add a Charge to Favorites (Quick Entry Expense).

Note: If you create an expense without setting a location for the expense report and then add the location later, the amount incurred for per diem expenses will default. However, unless you revisit the expense, make a modification, and save it, you will encounter an error when submitting the expense report. The same issue will occur when performing these steps in Costpoint Time & Expense. To prevent the error, assign a location to the expense report before you create per diem expenses.

Quick Entry Expense Tasks

This section contains procedures that you can perform on the Quick Entry Expense screen.

Add a Quick Entry Expense Report

Use the New Quick Entry screen to add a new quick entry expense report.

To add a new quick entry expense report:

1. Tap , and tap **Quick Entry Expense**.
2. On the Quick Entry Expense screen, tap **Add**.
3. On the New Quick Entry screen, enter or specify the values in the appropriate fields and tap **Save**.

> **Note:** Depending on your company's expense report type setup, the Quick Entry Expense screen may display additional sections, such as **Location** and **Overall Attachments**. Tap the section and enter or specify the values in the appropriate fields in each section and then tap **Apply**.

4. Tap **Add Expense** to add either a new expense or an unclaimed expense to the quick entry expense report.

> **Attention:** For more information, see Add a New Expense to the Quick Entry Expense Report and Add an Unclaimed Expense to the Quick Entry Expense Report.

Add a New Expense to the Quick Entry Expense Report

Follow this procedure to add a new expense to the quick entry expense report using the Quick Entry Expense screen.

To add a new expense:

1. On the New/Edit Quick Entry screen, tap **Add Expense**.
2. On the **Would you like to** pop-up message, tap **Create New Expense**.
3. On the Quick Entry Expense screen, enter or specify the values in the appropriate fields and tap **Save**.

> **Note:** Depending on your company's expense report type setup, the Quick Entry Expense screen may display additional sections, such as **Split Expense** and **Overall Attachments**. Tap the section and enter or specify the values in the appropriate fields in each section and then tap **Save**.

4. On the New/Edit Quick Entry screen, tap **Submit**.

> **Attention:** For more information, see Submitting an Expense Report for Approval.

Add a Charge to Favorites (Quick Entry Expense)

Use this procedure to add a charge to the Favorites list on the Quick Entry Expense screen.

To add a charge to favorites:

1. Tap and tap **Quick Entry Expense**.
2. On the Quick Entry Expense screen, do one of the following:

- Tap **Add**, tap **Add Expense**, and then tap **Create New Expense**.
- Tap an existing quick entry expense report, tap **Add Expense**, and then tap **Create New Expense**.

3. On the Quick Entry Expense screen, tap **Split Expense**.

   Note: The **Split Expense** section is displayed only when a charge is assigned to multiple projects.

4. On the Split Expense screen, tap either **Amount** or **Percentage** and then tap the check mark next to the charge you want to add as a favorite.

   The check mark turns green after you tap it.

   Note: You can tap one or multiple charges in the list.

5. Tap **Favorite**.

   The charge is added as a favorite on the Manage Favorites screen.

Add an Unclaimed Expense to the Quick Entry Expense Report

Follow this procedure to add an unclaimed expense to the quick entry expense report using the Quick Entry Expense screen.

To add an unclaimed expense:

1. On the New/Edit Quick Entry screen, tap **Add Expense**.
2. On the **Would you like to** pop-up message, tap **Create from Unclaimed**.
3. On the Unclaimed Expenses screen, tap an unclaimed expense.
4. On the Quick Entry Expense screen, enter or specify the values in the appropriate fields and tap **Save**.

   Note: Depending on your company's expense report type setup, the Quick Entry Expense screen may display additional sections, such as **Split Expense** and **Overall Attachments**. Tap the section and enter or specify the values in the appropriate fields in each section and then tap **Save**.

5. On the New/Edit Quick Entry screen, tap **Submit**.

   Attention: For more information, see Submitting an Expense Report for Approval.

Delete a Quick Entry Expense Report

Follow this procedure to delete a quick entry expense report with **Draft** status.

To proceed with the deletion, you must first select the **Allow User to Delete Quick Entry Expense Reports in Void or Draft Status** option on the Miscellaneous tab of the Expense Settings screen in Costpoint Time & Expense. Otherwise, the application will display the following message: "Delete unavailable based on Expense Setting."

To delete a quick entry expense report:

1. On the Quick Entry Expense screen, tap ⋮ and then tap **Delete Expense(s)**.
2. Tap the quick entry expense report with **Draft** status that you want to delete.

   You can tap one or more quick entry expense reports.
3. Tap **Delete**.

   Costpoint Mobile T&E displays a message asking if you want to delete the expenses. Tap **Yes** to proceed with the deletion.

Filter Quick Entry Expense Reports

You can limit the quick entry expense reports displayed on the Quick Entry Expense screen by filtering their statuses.

To filter quick entry expense reports:

1. Tap ☰ and tap **Quick Entry Expense**.
2. Tap **Filter** to display the Quick Expense Report Filters screen.
3. Tap **Off** to hide quick entry expense reports with this specific status on the Quick Entry Expense screen.

   By default, all quick entry expense report statuses are set to **On**.
4. Optionally, tap **From Date** and **To Date** to filter quick entry expense reports by date.

   > **Note:** This date range will not be saved after logout and will be reset to empty.
5. Tap **Apply** to save your changes.

   On the Quick Entry Expense screen, the filter icon changes to yellow, which indicates that filters are applied.

   > **Note:** Tap **Reset** to return to the Quick Entry Expense screen. When you tap **Filter** again, your previous filter selections are cleared on the Quick Expense Report Filters screen.

Self Service

The Self Service feature provides a way for Costpoint Mobile T&E users to view pay and expense payment records on a mobile device.

The **Self Service** icon displays on the Costpoint Mobile T&E menu if:

- You are using Costpoint version 8.2 or later.

> **Note:** To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

- You have appropriate rights to the Employee Service module in Costpoint.
- You have appropriate rights to the Payroll Checks application in Costpoint, at the minimum.

Tapping **Self Service** displays the Self Service screen, a non-editable screen that contains the Payroll and Expense Payment tabs.

> **Note:** If you have rights only to the Payroll Checks application, only the Payroll tab displays on the Self Service screen. If you also have rights to the Expense Checks application, the Expense Payment tab also displays on the Self Service screen.

The table below provides information about the tabs on the Self Service screen.

Self Service Tab	Description
Payroll	The Payroll tab displays a list of your pay records. Each pay entry includes the following details: ▪ Pay Check Date and Type ▪ Pay Period From Date and To Date ▪ Gross Amount and Net Amount The Payroll tab displays 10 of your most recent pay entries, sorted by check date. **Note:** If you do not have pay records, the screen displays **No Records Found**.
Expense Payment	The Expense Payment tab displays a list of your expense payment records. Each expense payment entry includes the following details: ▪ Check Date ▪ Check Number ▪ Total Amount of the Check The Expense Payment tab displays 10 of your most recent expense payment entries, sorted by check date. Tapping an entry displays the check number with the following details:

Self Service Tab	Description
	▪ Invoice Number ▪ Amount Paid **Note:** If you do not have expense payment records, the screen displays **No Records Found**.

View Pay and Expense Payment Records

Use the Self Service screen to view your pay and expense payment records.

To view your pay and expense payment records:

1. Tap , and tap **Self Service**.
2. On the Self Service screen, perform one of the following actions:
   - Tap **Payroll** to view your pay records.
   - Tap **Expense Payment** to view your expense payment records.

Tasks

The Tasks screen shows you various tasks that you need to perform, depending on your role.

These may include tasks such as updating your timesheet and approving timesheets or expense reports, if you have such rights.

Tapping and then displays the Tasks/Dashboard screen, with tasks arranged into categories.

The number of tasks that you must perform is indicated on the top of the Tasks/Dashboard screen. For example, 298 indicates that you have 298 tasks to perform.

Task notifications are also color-coded based on priority level.

- **Red**: This color indicates that at least one task is high priority.
- **Yellow**: This color indicates that at least one task is medium priority and no task is high priority.
- **Black**: This color indicates that all tasks are low priority.

Tasks Screen Icons

The table below provides information on the icons available on the Tasks/Dashboard screen.

Icon	Description
	Tap this icon to update the list of tasks and counts after you complete a task.
	Tap this icon to display the following option: ▪ **Help**: Tap this option to view the help topic for this screen.

Task Categories

The table below provides information on each task category and to which role the category is available.

Task Category	Description	Supervisor	User
Approve Timesheets	This task category is displayed and available only for supervisors. Tap **Approve Timesheets** to display the timesheets that are ready for review and approval. Tap a timesheet to display it on the Review screen. **Attention:** For more information, see Approve a Timesheet.	✓	
Approve Timesheet Charges	This task category is displayed and available only for supervisors that do not have rights to users' timesheets but do have rights to approve timesheet charges. Tap **Approve Timesheet Charges** to display the timesheet charge ready for review and approval on the Review screen. **Attention:** For more information, see Approve a Timesheet Charge. **Note:** This feature is available if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.	✓	

Task Category	Description	Supervisor	User
Sign Timesheets	Tap **Sign Timesheets** to display the timesheets that you added, or someone has added for you, and you need to sign. Timesheets that are not signed by the owner are marked **Signed** (in red text). If there is only one timesheet to sign, tapping **Sign Timesheets** displays the timesheet. If there are multiple timesheets to sign, tapping **Sign Timesheets** displays the list of timesheets. **Attention:** For more information, see Sign a Timesheet on the Tasks Screen.	✓	✓
Update Timesheets	Tap **Update Timesheets** to display the timesheets that you need to check and update. If there is only one timesheet to update, tapping **Update Timesheets** displays the timesheet. If there are multiple timesheets to update, tapping **Update Timesheets** displays the list of timesheets. **Attention:** For more information, see Update a Timesheet.	✓	✓
Submit Expense Reports	Tap **Submit Expense Reports** to display the expense reports that you created, or someone has created for you, and you need to submit for approval. **Attention:** For more information, see Submit an Expense Report for Approval on the Tasks Screen.	✓	✓
Approve Expense Reports	This task category is displayed and available only for supervisors. Tap **Approve Expense Reports** to display the Approve Reports screen, where you can approve or reject expense reports submitted for approval. **Attention:** For more information, see Approve an Expense Report.	✓	
Approve Expense Charges	This task category is displayed and available only for supervisors. Tap **Approve Expense Charges** to display the Approve Charges screen, where you can approve or reject expense report charges submitted for approval.	✓	

Task Category	Description	Supervisor	User
	Attention: For more information, see Approve an Expense Report Charge.		
Approve Attachments	This task category is displayed and available only for supervisors. Tap **Approve Attachments** to display the Approve Attachments screen, where you can approve or reject expense report attachments submitted for approval. **Attention:** For more information, see Approve an Expense Report Attachment.	✓	
Approve Leave Requests	This task category is displayed and available only for supervisors. Tap **Approve Leave Requests** to display the Approve Leave screen, where you can approve or reject leave requests. **Attention:** For more information, see Approve a Leave Request.	✓	
Correction Request	This task category is displayed and available only for supervisors. Tap **Correction Request** to display the Correction Request screen, where you can approve or reject timesheet correction requests. **Attention:** For more information, see Approve a Correction Request..	✓	

Timesheet Tasks

This section contains timesheet-related tasks that you can perform on the Tasks screen.

Review Screen

The Review screen allows supervisors or backup supervisors to review and approve or reject a timesheet or a timesheet charge.

The Review screen displays when you perform any of the following actions:

- On the Tasks Screen

    - Tap **Approve Timesheets** and tap the timesheet that you want to view.
    - Tap **Approve Timesheet Charges** and tap the timesheet charge that you want to view.
- On the Timesheet Search Screen
    - Tap , tap **Timesheet Search**, and perform a search. On the Search screen, tap the check mark next to the timesheet that you want to view, and tap **Review**.

Review Screen for a Timesheet

Tapping a timesheet displays the following details:

- User's Name
- Timesheet period ending date
- Status of the selected timesheet
- Number of revisions made to the selected timesheet
- Total hours submitted for that timesheet period, which include the regular hours and any overtime charges
- Previous timesheet period hours
- Next timesheet period hours

Tap any of the following tabs to filter your view:

- **Day**: Tap this tab to display the hours submitted for each day of the selected timesheet period, including any overtime charges.
- **Week**: Tap this tab to display the hours submitted per week for the selected timesheet, including any overtime charges.
- **Charge**: Tap this tab to display the hours per charge that you submitted for the selected timesheet, including any overtime charges.
- **Pay Type**: Tap this tab to display the hours per pay type that you submitted for the selected timesheet.

You may perform the following tasks on this screen:

- To view the audit information of a particular timesheet or the hours submitted for each date of the selected timesheet period, tap , and tap **Audit** or **Day View**.
- To approve a timesheet, perform one of the following actions:
    - Tap , and tap **Approve**.
    - Tap .
- To reject a timesheet, tap , and tap **Reject**.

Attention: For more information, see Approve a Timesheet, Reject a Timesheet, and View Timesheet Summary.

Review Screen for a Timesheet Charge

Note: This feature is available if you are using Costpoint 8.2 or later. To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

Attention: For more information, see "Approve Timesheet Charges" in the Costpoint Online Help under **Time** > **Timesheets**.

The Review screen for a timesheet charge is available only to supervisors that do not have rights to users' timesheets but do have rights to approve timesheet charges.

Each timesheet charge displays the following details:

- User's Name
- Timesheet period ending date
- Status of the selected charge (which is always Pending)
- Charge code
- Charge description
- Total hours submitted for that timesheet charge, which include the regular charge hours and any overtime charge hours
- UDT07–PLC (If available)
- UDT10–Pay Type
- UDT 01–Project (For subcontractors only)
- UDT 02–Project ID (For subcontractors only)
- Work Assignment ID

Note:

- The number of timesheet charges for approval is displayed on the header, below the user's name. Tap  or  to navigate between the timesheet charges.
- For subcontractors, the timesheet charges displayed are sorted by charges with user's UDT 02 charges first, followed by UDT 01 charges.

Tap any of the following tabs to display additional information related to the timesheet charge:

- **Hours Detail**: Tap this tab to display a breakdown of the hours entered per timesheet line within the timesheet period ending date.
  - The Cell column displays the date for the submitted timesheet charge.
  - The Hours column displays the number of hours submitted for the timesheet charge for that date.

> **Note:** A cost-only charge is indicated by an asterisk (*).

- **Pending Approval:** Tap this tab to see other supervisors who also have rights to approve or reject the timesheet charge.

You may perform the following tasks on this screen:

- To approve a timesheet charge, perform one of the following actions:
  - Tap , and tap **Approve**.
  - Tap .
- To reject a timesheet charge, tap , and tap **Reject**.

> **Attention:** For more information, see Approve a Timesheet Charge and Reject a Timesheet Charge.

Approve a Timesheet

This task applies only to supervisors.

> **Attention:** To reject a timesheet, see Reject a Timesheet.

> **Important:** If you are a backup supervisor, you can use the Search screen to search for signed timesheets awaiting your approval. On the Timesheet Search screen, tap , tap **Timesheet Search**, and perform a search. On the Search screen, tap the check mark next to the timesheet that you want to view, and tap **Review**.

> **Attention:** For more information, see Review Screen and Search Timesheets.

To approve a timesheet:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Timesheets**.
   - If there is more than one timesheet to approve, tapping **Approve Timesheets** displays the timesheet list. Tap a timesheet to display it on the Review screen.
   - If there is only one timesheet to approve, tapping **Approve Timesheets** displays the timesheet on the Review screen.
3. On the Review screen, review the timesheet details.
4. To approve the selected timesheet, perform one of the following actions:
   - Tap .

- Tap , and tap **Approve**.
- Tap , and tap **Day view**. In Day view, tap or tap , and tap **Approve**.

  Costpoint Mobile T&E displays a message stating that the timesheet is approved.

  If there is a problem with the timesheet, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors to approve the timesheet.

5. If there are multiple timesheets in the list, the Review screen displays the next timesheet.

   Tap to display the next timesheet or to display the previous timesheet.

   Attention: For more information, see "Approve Timesheets" in Guides and Videos.

Reject a Timesheet

This task applies only to supervisors.

Attention: To approve a timesheet, see Approve a Timesheet.

Important: If you are a backup supervisor, you can use the Search screen to search for signed timesheets awaiting your approval. On the Timesheet Search screen, tap , tap **Timesheet Search**, and perform a search. On the Search screen, tap the check mark next to the timesheet that you want to view, and tap **Review**.

Attention: For more information, see Review Screen and Search Timesheets.

To reject a timesheet:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Timesheets**.
   - If there are multiple timesheets, tapping **Approve Timesheets** displays the timesheet list. Tap a timesheet to display it on the Review screen.
   - If there is only one timesheet, tapping **Approve Timesheets** displays the timesheet on the Review screen.
3. Tap , and tap **Reject**.

   If there is a problem with the timesheet, Costpoint Mobile T&E displays errors and warnings.
4. On the Revision Explanation screen, enter or search for the revision explanation code or enter a note to explain the revision made.
5. Tap **Done**.

The timesheet status is changed to **Rejected**. The timesheet is sent back to the user, and the **Update Timesheets** indicator on the Tasks screen (of the user) is automatically updated to reflect the rejected timesheet.

6. If there are multiple timesheets in the list, the Review screen displays the next timesheet.

   Tap to display the next timesheet or to display the previous timesheet.

   Attention: For more information, see "Approve Timesheets" in Guides and Videos.

Approve a Timesheet Charge

This task applies only to supervisors that do not have rights to users' timesheets but do have rights to approve timesheet charges.

Attention: To reject a timesheet charge, see Reject a Timesheet Charge.

Important: If you are a backup supervisor, you can use the Search screen to search for timesheets charges awaiting your approval. On the Timesheet Search screen, tap , tap **Timesheet Search**, and perform a search. On the Search screen, tap the check mark next to the timesheet charge that you want to view, and tap **Review**.

Attention: For more information, see Review Screen and Search Timesheets.

To approve a timesheet charge:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Timesheet Charges**.
   - If there is more than one timesheet charge to approve, tapping **Approve Timesheet Charges** displays the timesheet charge list. Tap a timesheet charge to display it on the Review screen.
   - If there is only one timesheet charge to approve, tapping **Approve Timesheet Charges** displays the timesheet charge on the Review screen.
3. On the Review screen, review the timesheet charge details.
   - Tap the Hours Detail tab to display the date for the submitted timesheet charge and the number of hours submitted for it.
   - Tap the Pending Approval tab to see other supervisors who can approve the timesheet charge.
4. To approve the timesheet charge, perform one of the following actions:
   - Tap .
   - Tap , and tap **Approve**.

The number of timesheet charges for approval decreases and the next timesheet charge displays.

If there are multiple timesheet charges in the list, tap to display the next timesheet charge or to display the previous timesheet charge.

Attention: For more information, see "Approve Timesheets" in Guides and Videos.

Reject a Timesheet Charge

This task applies only to supervisors that do not have rights to users' timesheet but do have rights to approve timesheet charges.

Attention: To approve a timesheet charge, see Approve a Timesheet Charge.

Important: If you are a backup supervisor, you can use the Search screen to search for timesheets charges awaiting your approval. On the Timesheet Search screen, tap , tap **Timesheet Search**, and perform a search. On the Search screen, tap the check mark next to the timesheet charge that you want to view, and tap **Review**.

Attention: For more information, Review Screen and Search Timesheets.

To reject a timesheet charge:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Timesheet Charges**.
   - If there is more than one timesheet charge to approve, tapping **Approve Timesheet Charges** displays the timesheet charge list. Tap a timesheet charge to display it on the Review screen.
   - If there is only one timesheet charge to approve, tapping **Approve Timesheet Charges** displays the timesheet charge on the Review screen.
3. On the Review screen, review the timesheet charge details.
   - Tap the Hours Detail tab to display the date for the submitted timesheet charge and the number of hours submitted for it.
   - Tap the Pending Approval tab to see other supervisors who can approve the timesheet charge.
4. To reject the timesheet charge, tap , and tap **Reject**.
5. On the Reason screen, enter the reason for rejecting the timesheet charge, and tap **Done**.

   The number of timesheet charges for approval decreases and the next timesheet charge displays.

   If there are multiple timesheet charges in the list, tap to display the next timesheet charge or to display the previous timesheet charge.

Attention: For more information, see "Approve Timesheets" in Guides and Videos.

Approve a Correction Request

When you approve a correction request, the timesheet period is opened for the user, who is then notified that the timesheet is now available for correction. The **Correct** button on the user's timesheet becomes enabled.

Note: This task applies only to supervisors.

Attention: To reject a timesheet correction request, see Reject a Correction Request. Also, see Correct a Processed Timesheet.

To approve a timesheet correction request:

1. Tap ☰, and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Correction Request**.
3. On the Correction Request screen, tap ✔ next to the timesheet correction request you want to approve.

   Note: The check mark turns green after you tap it. You can tap one or multiple timesheet correction requests.

4. To approve the selected timesheet correction request, perform one of the following actions:
   - Tap ✔.
   - Tap ⋮, and tap **Approve**.

   Note:
   - If there is only one correction request, tapping **Approve** executes the action on the single request.
   - If there are multiple correction requests, tapping **Approve** displays the following message: **Select a row (tap check mark) to act upon.**

   Costpoint Mobile T&E displays a message stating that the timesheet correction request is approved.

   If there is a problem with the timesheet, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to approve the timesheet correction request.

5. If there are multiple timesheet correction requests in the list, the Correction Request screen displays the next timesheet correction request.

Tap ▶ to display the next timesheet correction request or ◀ to display the previous timesheet correction request.

Reject a Correction Request

When you reject a correction request, the user receives a notification of the rejection.

Note: This task applies only to supervisors.

Attention: To approve a timesheet correction request, see Approve a Correction Request. Also, see Correct a Processed Timesheet.

To reject a timesheet correction request:

1. Tap ☰, and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Correction Request**.
3. On the Correction Request screen, tap ✔ next to the timesheet correction request you want to reject.

   Note: The check mark turns green after you tap it. You can tap one or multiple timesheet correction requests.
4. Tap ⋮, and tap **Reject**.

   Note:
   - If there is only one correction request, tapping **Reject** executes the action on the single request.
   - If there are multiple correction requests, tapping **Reject** displays the following message: **Select a row (tap check mark) to act upon.**
5. On the Reason screen, enter the reason for rejecting the timesheet correction request, and tap **Done**.

   Costpoint Mobile T&E displays a message stating that the timesheet correction request is rejected.
6. If there are multiple timesheet correction requests in the list, the Correction Request screen displays the next timesheet correction request.

   Tap ▶ to display the next timesheet correction request or ◀ to display the previous timesheet correction request.

Sign a Timesheet (on the Tasks Screen)

You sign a timesheet that was previously signed by a supervisor (or another user) and submit it for approval.

To sign a timesheet:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Sign Timesheets**.
   - If there are multiple timesheets to sign, tapping **Sign Timesheets** displays the timesheet list. Tap a timesheet to display it on the Timesheet screen.
   - If there is only timesheet to sign, tapping **Sign Timesheets** displays the timesheet on the Timesheet screen.
3. On the Timesheet screen, tap **Sign** to sign a timesheet.
4. On the Signature Certification screen, view your timesheet summary by day, week, charge, or pay type by tapping the corresponding tab.

   Attention: For more information, see View Timesheet Summary.

   Note: This screen displays if **Use Summary on Sign** on the Settings screen is set to **On**.
5. Tap .

   If there is a problem with the timesheet you are saving, Costpoint Mobile T&E displays errors and warnings.

   Tap **Continue** to submit the timesheet or tap to return to the timesheet and make changes.
6. Tap **OK**.

   The timesheet status is changed to **Signed**. The **Approve Timesheets** indicator on the Tasks screen of the supervisor is automatically updated to reflect the signed timesheet.

Update a Timesheet

You update a timesheet by modifying hour values and other charge details of your time entries.

Note: If a timesheet is set up for a particular schedule (period within a schedule), text is displayed next to the timesheet period.

To update a timesheet:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Update Timesheets**.
   - If there is only one timesheet period to update, tapping **Update Timesheets** displays the timesheet on the Timesheet screen.

- If there are multiple timesheet periods to update, tapping **Update Timesheets** displays the list of timesheets.

3. On Timesheet screen, perform the necessary updates.

   You can modify hour values, delete charges, add charges, and modify charge details.

4. Tap to save your changes.

Expense Report Tasks

This section contains expense report-related tasks that you can perform on the Tasks screen.

Approval Workflow Screen

As a supervisor, you can view other approval workflows or tasks required for the expense report assigned to you through the Approval Workflow screen.

If there are multiple approval tasks required for an expense report, the Approve screen (Approve Reports, Approve Expense Charges, or Approve Attachments) also contains the Approval Workflow section. Tapping **Approval Workflow** displays the Approval Workflow screen, which displays the following details:

- The approver to which the approval task is assigned
- The approval status (pending or completed)
- The approval type (approve report, approve expense charge, or approve attachment)

Note: The Approval Workflow screen is non-editable and only displays if there are additional approval tasks assigned to the expense report other than the approval task assigned to you.

Approve an Expense Report

This task applies only to supervisors.

Attention: To reject an expense report, see Reject an Expense Report.

Note: If you are a backup supervisor, you can use the Search screen to search for expense reports awaiting your approval. For more information, see Search Expense Reports.

To approve an expense report:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Expense Reports**.

3. On the Approve Reports screen, review the expense report details.
4. To approve the expense report, perform one of the following actions:
   - Tap .
   - Tap , and tap **Approve**.

   Costpoint Mobile T&E displays a message stating that the expense report is approved.

   If there is a problem with the expense report, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors to approve the expense report.

5. If there are multiple expense reports in the list, the Approve Reports screen displays the next expense report.

   Tap to display the next expense report or to display the previous expense report.

   Attention: For more information, see "Approve Expense Reports" in Guides and Videos.

Approve an Expense Report Charge

This task applies only to supervisors.

Attention: To reject an expense report charge, see Reject an Expense Report Charge.

To approve an expense report charge:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Expense Charges**.
3. On the Approve Charges screen, review the expense report charge details.
4. To approve the expense report charge, perform one of the following actions:
   - Tap .
   - Tap , and tap **Approve**.

   Costpoint Mobile T&E displays a message stating that the expense report charge is approved.

   If there is a problem with the expense report charge, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors to approve the expense report charge.

5. If there are multiple expense charges in the list, the Approve Charges screen displays the next expense report charge.

Tap to display the next expense report charge or to display the previous expense report charge.

Attention: For more information, see "Approve Expense Reports" in Guides and Videos.

Approve an Expense Report Attachment

This task applies only to supervisors.

Attention: To reject an expense report attachment, see Reject an Expense Report Attachment.

To approve an expense report attachment:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Attachments**.
3. On the Approve Attachments screen, review the expense report attachment and its details.
4. To approve the expense report attachment, perform one of the following actions:
   - Tap .
   - Tap , and tap **Approve**.

   Costpoint Mobile T&E displays a message stating that the expense report attachment is approved.

   If there is a problem with the expense report attachment, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors to approve the expense report attachment.

5. If there are multiple expense report attachments in the list, the Approve Attachments screen displays the next expense report attachment.

   Tap to display the next expense report attachment or to display the previous expense report attachment.

   Attention: For more information, see "Approve Expense Reports" in Guides and Videos.

Reject an Expense Report

This task applies only to supervisors.

Attention: To approve an expense report, see Approve an Expense Report.

Note: If you are a backup supervisor, you can use the Search screen to search for expense reports awaiting your approval. For more information, see Search Expense Reports.

To reject an expense report:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Expense Reports**.
3. On the Approve Reports screen, tap , and tap **Reject**.
4. On the Reason screen, enter the reason for rejecting the expense report, and tap **Done**.

   Costpoint Mobile T&E displays a message stating that the expense report is rejected.
5. If there are multiple expense reports in the list, the Approve Reports screen displays the next expense report.

   Tap to display the next expense report or to display the previous expense report.

   When you reject an expense report, the user receives a notification of the rejection, and the reason for rejection entered on the Reason screen displays in the Reason for Rejection section of the expense report.

   Attention: For more information, see "Approve Expense Reports" in Guides and Videos.

Reject an Expense Report Charge

This task applies only to supervisors.

Attention: To approve an expense report charge, see Approve an Expense Report Charge.

To reject an expense report charge:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Expense Charges**.
3. On the Approve Charges screen, tap , and tap **Reject**.
4. On the Reason screen, enter the reason for rejecting the expense report charge, and tap **Done**.

   Costpoint Mobile T&E displays a message stating that the expense report charge is rejected.
5. If there are multiple expense report charges in the list, the Approve Charges screen displays the next expense report charge.

   Tap to display the next expense report charge or to display the previous expense report charge.

Attention: For more information, see "Approve Expense Reports" in Guides and Videos.

Reject an Expense Report Attachment

This task applies only to supervisors.

Attention: To approve an expense report attachment, see Approve an Expense Report Attachment.

To reject an expense report attachment:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Attachments**.
3. On the Approve Attachments screen, tap , and tap **Reject**.
4. On the Reason screen, enter the reason for rejecting the expense report attachment, and tap **Done**.

   Costpoint Mobile T&E displays a message stating that the expense report attachment is rejected.
5. If there are multiple expense report attachment in the list, the Approve Attachments screen displays the next expense report attachment.

   Tap to display the next expense report attachment or to display the previous expense report attachment.

Submit an Expense Report for Approval on the Tasks Screen

You can also sign an expense report to submit it for approval on the Tasks screen.

To submit an expense report for approval on the Tasks screen:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Submit Expense Reports**.
3. On the Expense Report screen, tap **Submit**.
4. Costpoint Mobile T&E may display additional screens that you need to complete before you can submit the expense report for approval. Complete the appropriate screen first, and tap **Next** to move to the next screen.
5. Once you have completed each screen, tap **Done**.
6. On the Certification screen, tap **I agree**.

   Make sure that all required expense details and attachments are included in the expense report based on the expense report type. If there is a problem with the expense report, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors in order to submit the expense report.

Costpoint Mobile T&E saves your changes and displays the expense report. The expense report status is changed to **Submitted**.

The Approve Expense Reports indicator on the Tasks screen of the supervisor is automatically updated to reflect the submitted expense report.

7. If there are multiple expense reports in the list, the Expense Reports screen displays the next expense report.

   Tap to display the next expense report or to display the previous expense report.

Leave Tasks

This section contains leave-related tasks that you can perform on the Tasks screen.

Approve a Leave Request

This task applies only to supervisors.

Attention: To reject a leave request, see Reject a Leave Request.

To approve a leave request:

1. Tap , and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Leave Requests**.
3. On the Approve Leave screen, the user's leave request displays.

   If the user has submitted multiple leave requests, the leave is broken down by the individual days.

   Note: The Approve Leave screen displays only leave requests with pending approval tasks from the supervisor.

4. Tap next to the leave request you want to approve.

   The check mark turns green after you tap it. You can tap one or multiple leave requests.
5. To approve the leave request, perform one of the following actions:
   - Tap .
   - Tap , and tap **Approve**.

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Costpoint Mobile T&E displays a message stating that the leave request is approved.

6. If there are leave requests submitted by other users, the Approve Leave screen displays the next user.

   Tap ▶ to display the next user or ◀ to display the previous user.

Reject a Leave Request

This task applies only to supervisors.

Attention: To approve a leave request, see Approve a Leave Request.

To reject a leave request:

1. Tap ☰, and tap **Tasks**.
2. On the Tasks/Dashboard screen, tap **Approve Leave Requests**.
3. On the Approve Leave screen, the user's leave request displays.

   If the user has submitted multiple leave requests, the leave is broken down by the individual days.

   Note: The Approve Leave screen displays only leave requests with pending approval tasks from the supervisor.

4. Tap ✔ next to the leave request you want to reject.

   The check mark turns green after you tap it. You can tap one or multiple leave requests.

5. On the Approve Leave screen, tap ⋮, and tap **Reject**.
6. On the Reason screen, enter the reason for rejecting the leave request, and tap **Done**.

   Costpoint Mobile T&E displays a message stating that the leave request is rejected.

7. If there are leave requests submitted by other users, the Approve Leave screen displays the next user.

   Tap ▶ to display the next user or ◀ to display the previous user.

Leave

The Leave screen allows you to view your leave balances by type, view your leave requests, and submit leave requests.

The leave types displayed are based on your company’s configuration. If leave types are not set up for the user in Costpoint Time & Expense, the Leave screen displays **No leave information found**.

The Leave screen displays your leave balances by leave type. Examples of leave types are holiday, vacation, and sick leave.

Tapping a leave type displays the following information:

- Number of leave hours accrued
- Number of leave hours taken
- Adjustments by leave type
- Leave transaction details

The Leave screen contains the following icons:

Icon	Description
	Tap this icon to display the following option: - **Help**: Tap this option to view the help topic for this screen.
Requests	Tap this icon to display the Leave Requests screen and view the leave requests you submitted.
Add	Tap this icon to display the Request Leave screen and submit a leave request.

Note:

- The Leave feature is available if you are using Costpoint 8.1.x or later. If you are using Costpoint 8.2.1 or later, the **Leave** menu does not display if the **Hide Leave Functions** option is selected in Costpoint Time & Expense.
  For more information on the **Hide Leave Functions** option, see “Basic Information Tab” in the Costpoint Online Help under **Time & Expense** > **Time** > **Time Controls** > **Timesheet Classes**.
- If the **Do Not Track Leave Balances** option associated with the timesheet class in Costpoint Time & Expense is selected, leave balances are not tracked.
  For more information, see "Leave Subtask" in the Costpoint Online Help under **Time** > **Time Controls** > **Timesheet Classes**.

To check your Costpoint version, see **About (Deltek Costpoint)** on the Settings screen.

Leave Requests Screen

Use this screen to view the leave requests you submitted. The leave requests listed are sorted by date, from newest to oldest.

Screen Fields

Field	Description
Date	This field displays the date of the leave request.
Status	This field displays the status of the leave request.
Number of Hours	This field displays the number of leave hours.

Request Leave Screen

Use the Request Leave screen to submit a leave request.

Screen Fields

Field	Description
From	Tap the calendar icon to display the date picker and tap the start date for your leave request.
To	Tap the calendar icon to display the date picker and tap the end date for your leave request. If your leave request spans a full work day or less, use the same date in both the **From** and **To** fields.
Leave Type	Tap this field to select the leave type you are submitting. Note: This field only displays leave types for which the **Allow Leave Request** option associated with the timesheet class in Costpoint Time & Expense is selected. For more information, see "Leave Subtask" in the Costpoint Online Help under **Time & Expense** > **Time** > **Time Controls** > **Timesheet Classes**.
Daily Hours	If you are submitting a leave request for multiple days, tap this field to enter the total hours for each day.
Total Hours	This field displays the total hours for the leave request.
Notes	Tap this field to display the Notes screen and enter notes about your leave request.
Apply	Tap this button to submit your leave request. Your supervisor will be notified of the leave request through an email.
Clear	Tap this button to delete your entries on the Request Leave screen.

Leave Tasks

This section contains procedures that you can perform on the Leave screen.

View Leave Balances

You view your available leave balances prior to submitting a leave request.

To view leave balances:

1. Tap , and tap **Leave**.
2. On the Leave screen, tap the leave type that you want to view the details.

View Leave Requests

The leave requests listed on the Leave Requests screen are sorted by date, from newest to oldest.

To view the leave requests:

1. Tap , and tap **Leave**.
2. On the Leave screen, tap **Requests**.
3. On the Leave Requests screen, scroll through the list to view the leave requests.

   Each leave request displays the leave request date, status, and the number of leave hours.

Submit a Leave Request

Use the Request Leave screen to submit a leave request.

To submit a leave request:

1. Tap , and tap **Leave**.
2. On the Leave screen, tap **Add** located at the bottom of the screen.
3. On the Request Leave screen, enter or specify the values in the appropriate fields, and tap **Apply**.

   Your supervisor will be notified of the leave request through an email notification.

   > **Note:** During time and leave request entries, fractional hours entries are rounded based on the **Hours Increment** and **Rounding** settings for the timesheet class in Costpoint Time & Expense.

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Attention: For more information, see Rounding Time Entries Based on the Timesheet Class Settings.

Settings

The Settings screen helps you configure the Costpoint Mobile T&E settings.

The table below provides information on the fields and options on this screen.

Note: Tap ⋮ and tap **Help** to view the help topic for this screen.

Attention: For more information, see "Configure Settings" in Guides and Videos.

Fields and Options	Description
User Name	This field displays the name (First Name/Middle Initial/ Last Name) of the user currently logged into the application.
Domain	This field displays the database name.
Login using Fingerprint/Face ID	Tap **On/Off** to enable or disable the biometric login on your device.
Time Zone	This field displays the selected time zone and is not editable.
Visual Confirmation	Tap an option to have Costpoint Mobile T&E display a confirmation message after you perform an action such as saving a timesheet, signing a timesheet, or approving a timesheet. Your options are: ▪ **No Confirmation**: Tapping this option does not display a confirmation message after you perform an action. ▪ **Timed Confirmation**: Tapping this option displays a confirmation message which closes after three seconds. Or you can tap **OK** to close the confirmation message. This is the default setting. ▪ **Action Confirmation**: Tapping this option requires you to tap **OK** to close the confirmation message.

Fields and Options	Description
Home Page	Use this field to set the default screen of the application upon login. Your options are: ▪ Timesheet ▪ Time Clock ▪ Expense Report ▪ Quick Entry Expense The options displayed are based on your access to the application. **Timesheet** displays if you have access to the Time application. **Expense Report** displays if you have access to the Expense application. This field defaults to **Timesheet** if you have access to the Time application. This field defaults to **Expense Report** if you do not have access to the Time application. **Attention:** For more information on how to configure access to the Mobile and Time applications, see "Allow Access to the Costpoint Mobile T&E Application" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide*.
Hours Entry	Tap an option to set the number entry method to use on your mobile device. Your options are **Use Keypad** and **Use Picker**.
Mobile Hours Increment	Tap an option to set how the hours are entered and displayed or validated on the device when using the keypad. Your options are **Whole**, **Half**, **Quarter**, and **Tenth**. The options displayed are valid only for your timesheet class. For example, if the timesheet class is set to: ▪ **Whole**: The picker displays hours in whole numbers, for example, 1.00. ▪ **Half**: The picker displays hours in whole numbers

Fields and Options	Description
	and in half-hour increments, for example, 1.50. ▪ **Quarter**: The picker displays hours in whole numbers and in quarter-hour increments, for example, 1.25, 1.50. ▪ **Tenth**: The picker displays hours in whole numbers and in tenth-of-an-hour increments, for example, 1.10, 1.20. ▪ **Hundredth**: The picker displays hours in whole numbers and in hundredth-of-an-hour increments, for example, 1.99, 1.46. **Note:** This field is hidden if you do not have access to the Mobile Time application. If you are using Costpoint 2025.2 or earlier, this field is hidden when your timesheet class is configured for the Time In-Out feature. If you are using Costpoint 2025.3 or later, the **Allow Increment Change in Mobile** option will become available for the timesheet class in Costpoint Time & Expense, enabling you to control the display of the **Mobile Hours Increment** field in Costpoint Mobile T&E. ▪ If the **Allow Increment Change in Mobile** option is selected, the **Mobile Hours Increment** field will be available, and the mobile application will follow this selection for timesheet increments. ▪ If the **Allow Increment Change in Mobile** option is not selected, the **Mobile Hours Increment** field will be hidden. The timesheet increments displayed will align with your timesheet class settings, and any updates will be reflected in the mobile application.
Display Non-work Days	Tap **On/Off** to set the days that will be displayed on the timesheet. ▪ Tap **On** to display non-work days.

Fields and Options	Description
	▪ Tap **Off** to display only work days. (Flexible days are displayed if the Work Schedule is set.) **Note:** This field is hidden if you do not have access to the Mobile Time application.
Show Charge Detail in Day Summary	Tap **On/Off** to set your view on the Day tab of the Summary screen. ▪ Tap **On** to view the charge details submitted for each day of the selected timesheet period. ▪ Tap **Off** to view only the total number of hours you submitted for each day of the selected timesheet period. **Note:** This field is hidden if you do not have access to the Mobile Time application.
Charge Summary Breakdown	If Project Labor Categories (PLCs) are assigned to the same charge code, tap this field to select how to group the charge detail lines. Your options are: ▪ UDT02 ▪ UDT02/UDT01 ▪ UDT02/UDT07 ▪ UDT02/UDT01/UDT07 Based on the selected group, the charge detail lines will be displayed as a separate line instead of being rolled up under the charge code on the Charge tab on the Timesheet Summary screen. By default, the charge detail lines are grouped by **UDT02**. This means each unique UDT02 charge line is displayed on the Charge tab on the Summary screen. If you tap and select **UDT02/UDT01**, a unique combination of UDT02/UDT01 charge line is displayed on the Charge tab.
Timesheet Line Sort	Tap an option to sort the charges on your timesheet

Fields and Options	Description
	by: ▪ **Line Number**: This is set by default. ▪ **Charge ID** ▪ **Charge Description** Changes made to the sorting order are applied when you save the timesheet. **Note**: This field is hidden if you do not have access to the Mobile Time application.
Use Summary on Sign	Tap **On/Off** to display or hide the Signature Certification screen when you sign a timesheet. When this option is enabled (**On**), the Signature Certification screen, which shows the total, regular, and overtime hours for the selected period as well as the previous period and next period hour information, displays upon signing a timesheet.
Use ICR for Expenses	This field is available only if the **Allow ICR Expense Processing** option in Costpoint is selected. Tap **On/Off** to set the use of ICR in capturing expenses. Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the Expense Report screen, and populates the matched fields. **Note**: This field is hidden if you do not have access to the Mobile Expense application and the **Allow ICR Expense Processing** option in Costpoint Time & Expense is cleared. **Attention**: For more information on how to configure this option, see "Enable or Disable ICR Processing in Capturing Expense" in the *Deltek Costpoint Mobile Time and Expense Technical Installation and Configuration Guide.*
Use Quick Entry for Capture	This field is available only if the **Allow ICR Expense Processing** and **Allow Quick Entry Expense Report** options in Costpoint are selected. Tap **On/Off** to add

Fields and Options	Description
	new receipts to the quick entry expense report by default when using Capture Receipt.
Reduce image size	This field is available only if the **Use ICR for Expenses** field is set to **On**. Tap **On/Off** to compress the size of the Expense Report attachments captured during Capture Receipt up to 2MB or even smaller.
Help	Tap this option to display the Costpoint Mobile Time and Expense User Guide page, where you can access the Costpoint Mobile T&E online help, videos, and learning aids. You can also access **Help** by tapping and tapping **Help**.
About	Tap this option to view the device and operating system information, which includes the following: ▪ Device Type ▪ Operating System ▪ User Agent Name and Version ▪ Application (Native App or Web App) Version ▪ Touch Server Version ▪ Web Service Version ▪ Deltek Costpoint Version ▪ Touch Server Build ▪ Native App Build ▪ Web App Build ▪ Screen Resolution ▪ Window Resolution ▪ Passcode/Encrypted You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek Support Services if you have an issue with the application.
Privacy Policy	Tap this option to view the Legal Notices and Privacy Statement information page of Deltek.
Local Storage/Cookies Settings	This field displays either **Accept All** or **Only Required**

Fields and Options	Description
	based on the option you selected on the Local Storage/Cookies Policy screen during login. Tap this field to display the Local Storage/Cookies Policy screen and update your preferences. **Attention:** For more information about local storage and cookie management, see Managing Local Storage and Cookies.
Change PIN	Tap this option to create a new PIN to use when logging into the application. **Note:** This option is hidden if you enabled Biometric login.
Forget Me On This Device	Tap this option to delete all information details from the application, including login information and settings. **Attention:** For more information, see Delete Information from the Application.
Screenshots/Recording Temporarily Allowed	Tap this option to enable screenshots and screen recording for 15 minutes during the current session on an Android device. **Note:** This option is hidden on iOS devices.

Configure the Costpoint Mobile T&E Settings

Use the Settings screen to view or modify the Costpoint Mobile T&E settings.

To configure the Costpoint Mobile T&E settings:

1. Tap , and tap **Settings**.
2. View or modify the appropriate fields and options on the Settings screen.

Change PIN

Create a new PIN to use when logging into the application.

To change your PIN:

1. Tap , and tap **Settings**.
2. Tap **Change PIN**.
3. On the Login screen, enter a PIN, and tap .

> **Note:** If you decide not to change your PIN, tap to go back to the Settings screen.

4. Re-enter the PIN to confirm, and tap .

Delete Information from the Application

Use the Forget Me On this Device feature to delete all information details from the application, including login information and settings.

To delete information from the application:

1. Tap , and tap **Settings**.
2. Tap **Forget Me On This Device**.

   The application closes. On your next login, you are required to enter your user ID, password, and database information.

Help

Tap , and tap **Help** to display the Costpoint Mobile Time and Expense User Guide page, where you can access the Costpoint Mobile T&E online help, videos, and learning aids.

On certain screens, tapping displays the **Help** option. When you tap **Help**, you can view the help topic specific to that screen.

In-App Review

An in-app pop-up review is integrated with Costpoint Mobile T&E running on any supported operating system.

The pop-up review is triggered either by signing a timesheet or submitting an expense report for the first time, prompting you to submit ratings and reviews without the inconvenience of leaving the application.

Note: Costpoint Mobile T&E displays the pop-up review only if you are using an x.x.1 version of the application (for example, 2.2.1 or 2.3.1) and if you have not previously submitted a review.

Log Out

Tap , and tap **Log Out** to exit the application, requiring you to enter your password or PIN on your next login.