How to Install/Set up Interactive Emails for Costpoint Time & Expense

> 💡 **Note:** The Interactive Email feature relies on Adaptive Card technology. If your company is using Microsoft 365 Government Community Cloud High (GCC High), this platform does not support Adaptive Cards, so the feature is unavailable to you.

What are Interactive Emails?

Costpoint Time & Expense can send interactive emails in a Microsoft adaptive card format. This allows you to enter time, approve, or reject timesheets right from your Microsoft (MS) Outlook email.

The selected actions are immediately reflected within the Time & Expense application.
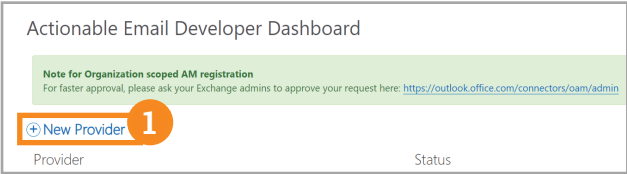
Prerequisite

To use the Interactive Email features, you must register your Organization with Microsoft as a Provider (Sender) of Actionable Messages.

> 💡 **Note:** Registering with Microsoft is not required for Deltek Cloud customers because Deltek is registered with Microsoft as a Global Sender.

For on-premise Costpoint customers, to start the registration process:

1 Go to **https://outlook.office.com/connectors/oam/publish**, and click **+ New Provider**.

Actionable Email Developer Dashboard

Note for Organization scoped AM registration
For faster approval, please ask your Exchange admins to approve your request here: https://outlook.office.com/connectors/oam/admin

⊕ New Provider **1**

Provider   Status

2 For the **Scope of submission**, select **Organization** and then return to the first section.

2. Scope of submission

Who are you enabling this for? *

○ Test Users (Test your provider on users from same tenant, auto-approved)

● **2** Organization (You will be submitting this request to your organization's Exchange administrators. Please note that rollout takes 24 hours after this submission is approved)

○ Global (Please note that rollout takes 2 weeks after this submission is approved)

3. Additional Information

Email addresses of other people who should be notified.

expense-notification@contoso.com ⊗

Add another email address

Comments

Any additional detail for your administrator to easily approve this request.

☐ I accept the terms and conditions of the App Developer Agreement

Save   Cancel

Time & Expense Interactive Emails Start to Finish Setup

3 In the **Friendly Name** field, enter a name that is meaningful to you. This value is used just for your reference.

4 Make note of the **Provider Id** and the **Sender email address**. These are the values that you need to enter into Configuration Utility.

5 After you generate a key pair, click ellipses button to copy the **Public Key**, and enter it into the provider page.

The **Target URL** is the Costpoint URL that must be publicly available on the Internet with a valid SSL certificate.

6 When done, save the provider page and save changes in Costpoint Configuration Utility.

Actionable Email Developer Dashboard

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1. New Provider

Friendly Name *
(any name as you wish)

Provider Id (originator)
232191db-4a70-4832-a218-d6a4dcf015cf

Organization Info

Sender email address from which actionable emails will originate *
costpoint@deltek.com

Add another email address

Target URLs *
(HTTPS URLs which will be invoked by the actions from the message card. Regex can be used to club mutiple URLs)
(Costpoint public URL)

Add another actions URL

Public Key
(Provide your own public key if you want to send signed card payloads)
(generated public key from Config Utility)

Add another public key

Logo
Logo must be of type .png, .jpg or .gif and no greater than 60 kb

Interactive Email Settings

| Provider ID | | Sender Email | costpoint@deltek.com |
| Private Key | MIIEvQIBAD... | Public Key | >AQAB</Exponent></RSAKeyValue> | Generate Keys |

Costpoint Configuration

The Interactive Email tab in Configure System Settings includes options to enable interactive email notifications for Time & Expense. Select the **Enable Time & Expense Interactive Email** checkbox to enable.

Access: **Admin > System Administration > System Administration Controls > Configure System Settings**

🏠 ★ ☐ ▤ Admin > System Administration > System Administration Controls > Configure System Settings

| Company Settings | Batch Job | Case Reporting | Login Banner | Interactive Email |

☑ Enable Time & Expense Interactive Email
☑ Enable Workflow Interactive Email
☑ Enable Requisition Approval Interactive Email

It is essential for users to ensure that their email address in the Manage Users (SYMUSR) application matches the primary email address in MS Outlook to receive interactive emails; otherwise, the system will default to a plain email format.

🏠 ★ ☐ ▤ Admin > Security > System Security > Manage Users

❯ Manage Users   New | Copy | ▼ | Delete | |◀ ◀ | 1 of 1 New | ▶ ▶| | Table | Query | ▼ | ☐ | ☐ | ✕

User ID *   User Name *

| Information | Workflow | Printing Defaults | Authentication | Web Services | User Interface |

User Information   Status   Preferences User Can Change

Employee ID   Deactivation Date   ☐ Name
Phone   Date Password Changed   ☐ Notification Options
Extension   Mobile -None- Last Login Date   ☐ Phone and Extension
                   Carrier   ☐ Register Biometric Device
Locale ID   ☑ Force Password Change   ☐ Password
Email   ☐ Notify When Batch Job Is Completed   ☐ Default Company
Preferred   ☐ Allow User to Override Batch Job Priority
Notification   ☐ Can Report Issues From Application Screen   Default Company *
Method

Company Access   Assigned User Groups   Module Rights   Application Rights   UI Profiles   Passkeys

Time & Expense Interactive Emails Start to Finish Setup

## What are Interactive Emails used for?

Interactive Email functionality enables administrators to send automated reminders directly to the inboxes of designated recipients, if timesheets have not been saved, signed, or approved. Interactive emails contain details sourced directly from the timesheet, as well as other interactive fields.

Timesheet Interactive Email

Resources can enter and submit hours from within the email without logging on to Costpoint. Hours and other changes saved in the email automatically update the real timesheet.

The image below provides an example of the fields and options that are displayed in the body of the email:
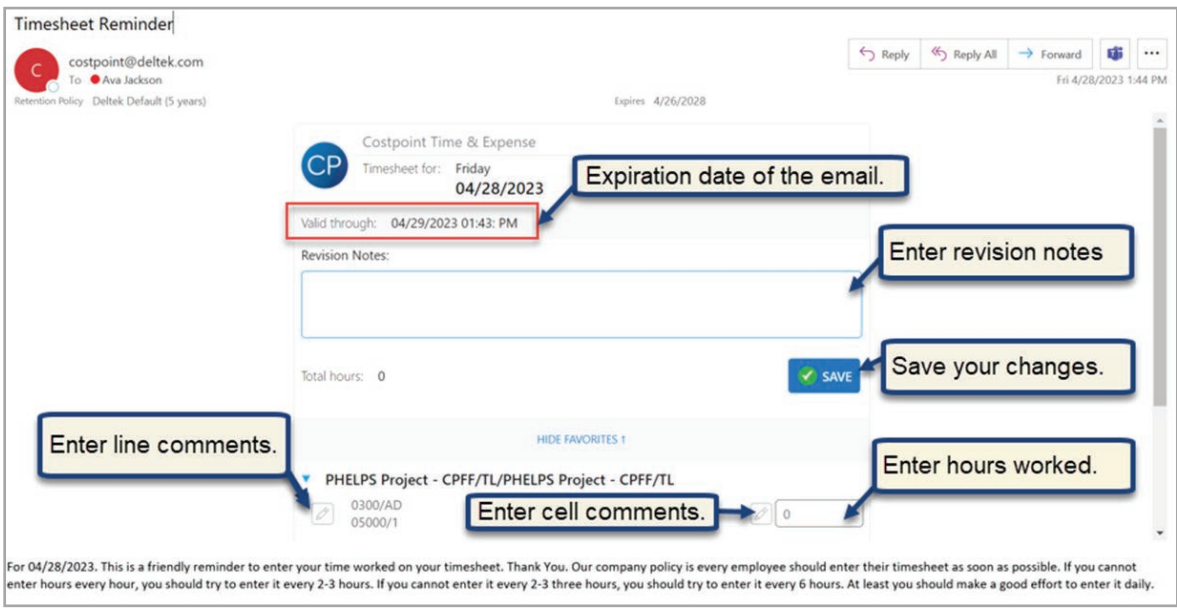
Timesheet Approval/Rejection Interactive Emails

Interactive emails enable personnel responsible for approving timesheets the ability to approve or reject timesheets from within the email itself, and the selected actions are immediately reflected within Time & Expense.

The image below provides an example of the fields and options that are displayed in the body of the email:
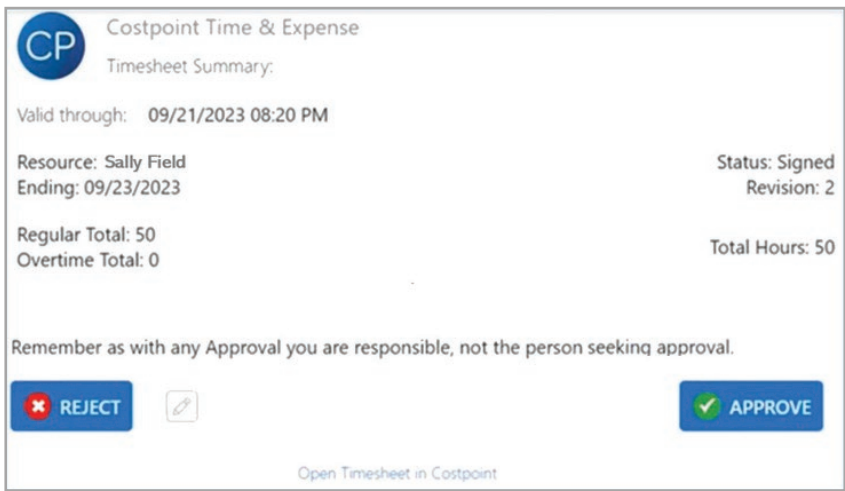
Timesheet Reminders

Use the Timesheet Reminder screen to generate automatic email reminders for entering, signing, or approving timesheets. From this screen, you can check whether timesheets are outstanding (unsaved) for the current day, or unsigned, or unapproved for the current period. The check can be performed according to functional role and by employee group and timesheet class. Email reminders are automatically sent based on results.

Sign Timesheet Reminder

Select this option to check for timesheets in the current period that are not yet signed.

Approve Timesheet Reminder

Select this option to check for timesheets in the current period that are not yet approved.

Daily Time Entry

In this section, select Entered Time Reminder to run a check for any timesheets for the current period or current day where hours have not yet been saved. Use settings under Work Schedule to further customize the delivery options.

Option	Description
Send	If interactive email functionality is enabled for Time & Expense within Costpoint Administration, the Email checkbox is replaced with the Send drop-down list.
	From the Send drop-down list, select the type of reminder you want to send. Choose from the following:
	● **Interactive Email:** Select this option to send an email that is enabled with interactive fields that directly update the timesheet in Costpoint, enabling the recipient to complete the timesheet without logging in to Costpoint.
	● **From Expires After:** Choose the number of hours for which the email message will be valid. After that period elapses, the email is no longer editable.
	● **Email:** Select this option to send an email that includes only a reminder. When this option is selected, resources need to log on to Costpoint to complete the timesheet.
Work Schedule Options	Use options in this section to manage email delivery according to resource work schedules.
	● **Always Send on Workdays:** Select this option to deliver emails only on workdays.
	● **Send if Hours are Less Than Scheduled:** Select this option to send the reminder only if the hours entered on the timesheet are less than those scheduled.
	● **Send on Holiday:** Select this option to send the reminder even on holidays.
	● **Send on Approved Leave:** Select this option to send the reminder even on days where leave is approved.

Emails can be scheduled for delivery in advance for designated days and times. You can direct email reminders toward groups and classes by functional role or to all groups and classes.

The system-generated emails include default text specific to the reminder type (for example, "Remember to sign your timesheet."), but the subject line and body text are both customizable. See the **Customize Timesheet Reminder Alerts** section below for details.

Customize Timesheet Reminder Alerts

In the Email Text application, you can set Timesheet Reminders as an Email Source option. You can customize the subject line and body text of the email for all three types of reminders: enter timesheet, sign timesheet, and approve/reject timesheet.

Access: **Time & Expense > Configuration > General Controls > E-mail Text**

You can enter customized text in the **Custom** field, as for example, to add the time by which the action must be completed.

Daily Floor Check Report Interactive Emails

The **Interactive Email** option on the Daily Floor Check screen is available only if this feature is enabled for Time & Expense. When enabled, selecting the Interactive Email option allows you to send resources an email where they can complete assigned tasks directly within the email body, streamlining the process.

> 💡 **Note:** The Interactive Email functionality is configured from the Configure System Settings screen in Costpoint Administration.

Access: **Time & Expense > Time > Timesheet Reports/Inquiries > Daily Floor Check**