

Deltek

Deltek Costpoint®

Costpoint 7.1.1 Getting Started Guide

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INTRODUCING COSTPOINT

Deltek Costpoint is the industry-leading Enterprise Resource Planning solution for government contractors and other project-driven organizations, including (but not limited to) the following industries:

- Aerospace and defense
- Architecture and design
- Biotechnology
- Computer services
- Consulting services
- Construction
- Engineering
- Environmental
- Federal government
- Government contracting
- High technology
- Laboratories
- Make-to-order manufacturing
- Non-profit
- Professional services
- Public relations and marketing
- Research and development
- Shipbuilding and marine services
- Software development
- Systems integration
- Technical services

These enterprises adopt Deltek Costpoint to improve their operational efficiency and profitability, and to meet the strict compliance and audit requirements of their customers, as well as government auditors, such as the Defense Contract Audit Agency (DCAA).

Deltek Costpoint offers an array of comprehensive capabilities that deliver game-changing results for your organization:

- Financial Management
- Project Accounting
- Time and Labor Collection
- Expense Management
- Project Manufacturing
- Material and Inventory Management
- Procurement
- Budgeting and Planning
- Human Resources and Payroll
- Business Development
- Performance Management
- DCAA Compliance



These modules integrate seamlessly with specialized Costpoint modules in materials management, human resources, reporting tools, and electronic timekeeping.

The online help provides instructions for accessing Costpoint's applications as well as descriptions of menus, toolbars, and other global features. You will also find information on logging on to Costpoint, accessing the database, printing reports, reviewing online help, and contacting Deltek Customer Care and other client services.

GETTING STARTED

Welcome to the Deltek Costpoint product suite. The exact products, domains, and applications you have depend upon what you have purchased. Regardless of the applications you have though, the user interface and basic functionality remain the same.

This Getting Started online help provides instructions for accessing applications, descriptions of menus, toolbars, and other global features. There is also information on accessing the database, printing reports, reviewing online help, and contacting Deltek Customer Care and other client services.

DUAL TABLE OF CONTENTS

We are in the process of transitioning to a new tool used to create our online help. In this transition phase, you can still display help from any page by selecting **Help, Help** or pressing **Shift/F1**. The help appears in a slightly different format, but has the same data. For the existing help, you can still click **Show** to see the entire table of contents. In the newer help, the table of contents always appears. The two tables of content work together to display all help. You can move to and from the tables of content to search help as needed.

Online help will be transitioned to our new tool gradually, by domain.

Domains converted to the new authoring tool

- Getting Started
- Time & Expense
- Admin
- Reports & Analytics - Dashboards

Sample Tables of Content

Existing:

The screenshot shows a web-based help system with a blue header bar containing 'Contents', 'Search', 'Print', and 'Back' buttons. The main content area is titled 'Time & Expense Help' and contains the text: 'Click below to display the Time & Expense help.' followed by a link 'Time and Expense online help'. To the left of the main content is a vertical table of contents tree:

- ☰ GETTING STARTED
 - ⌚ GETTING STARTED
 - ⌚ CONTINUOUS DELIVERY MODEL
 - ⌚ USER INTERFACE
 - ⌚ GLOBAL MENUS AND TOOLBARS
 - ⌚ APPLICATION FUNCTIONS
 - ⌚ SUPPORT OPTIONS
- ☰ COSTPOINT
 - ⌚ COSTPOINT GETTING STARTED
 - ⌚ ACCOUNTING
 - ⌚ PROJECTS
 - ⌚ PEOPLE
 - ⌚ MATERIALS
- ☰ REPORTS & ANALYTICS
 - ⌚ REPORTS AND ANALYTICS
 - ⌚ ENTERPRISE REPORTING
 - ⌚ ANALYTICS
 - ⌚ DASHBOARDS
- ⌚ BUDGETING AND PLANNING
- ☰ TIME & EXPENSE
 - ⌚ Time & Expense Help
- ⌚ ADMINISTRATION
- ⌚ TRAINING RESOURCES

New:

The screenshot shows the Deltek Costpoint Help interface. At the top left is the Deltek logo. The top right features a search bar with the placeholder "Enter search terms" and a magnifying glass icon. Below the header is a blue navigation bar with icons for back, forward, search, and other functions. The main content area has a blue header bar with the title "II-Costpoint Help". Underneath is a breadcrumb trail: "Home > Getting Started". A search bar is also present in the top right of the content area. The main content is titled "Getting Started" and includes a welcome message and a detailed description of the online help system. It also lists "Related Topics" such as "Continuous Delivery Model", "User Interface", "Global Menus and Toolbars", "Application Functions", and "Support Options". On the left side, there is a sidebar titled "Contents" with a tree view of topics like "Getting Started", "Continuous Delivery Model", "User Interface", etc. At the bottom of the sidebar is a "Search Results" section.

CONTINUOUS DELIVERY MODEL

Costpoint 7.1.1, Budgeting and Planning 7.0, and Time and Expense 10.0 have moved to a "Continuous Delivery Model" where new features and enhancements are released incrementally on top of the existing versions without requiring customers to upgrade to a major, minor, or maintenance release as often.

New enhancements will be made available through DSM after development and testing are complete. These software changes can be applied the same way that hot fixes, regulatory updates, and cumulative updates are currently applied, through a combination of system jar and application level changes. Some features may require a new license, some may be enabled through a control/configuration setting, and others such as an increase to a field size in the database will be immediately enabled once the changes are applied.

Although each enhancement includes release notes, the online help is only periodically updated to reflect these changes. If you use hosted help, you will see these changes as they become available. If you do not use hosted help, we recommend that you install periodic help updates. These updates are also available from DSM. You will receive an alert when a new help installer is available.

For more information on the Costpoint Continuous Delivery model you may refer to KB article # 81289, or also see *DeltekCostpoint711ContinuousDeliveryModelWhitePaper.pdf*, available from DSM.

To view the online help in Internet Explorer, you must apply a few adjustments in the Compatibility View Settings. Click **Tools** » **Compatibility View Settings**. Clear the **Display intranet sites in Compatibility View** check box. And then, refresh the browser. Make sure you remove Deltek.com (if listed) from the Web sites you have added to Compatibility View list.

DOCUMENTATION FEEDBACK

We at Deltek are always striving to improve your experience with our products. As such, we welcome any feedback regarding this online help system.

Please email any questions, issues, or comments to:

CostpointDocFeedback@deltek.com

GETTING STARTED WITH COSTPOINT

THE USER INTERFACE

USER INTERFACE OVERVIEW

The user interface is designed to optimize user navigation. Global toolbars and menus provide easy access to commonly used functions, while the major programs areas, organized under five domains, display below. The following images provide overviews of the major features of the user interface.

Global Toolbars and Menu:

The user interface provides you with several convenient menus and toolbars, always available and accessible, so you can carry out your tasks quickly and efficiently.



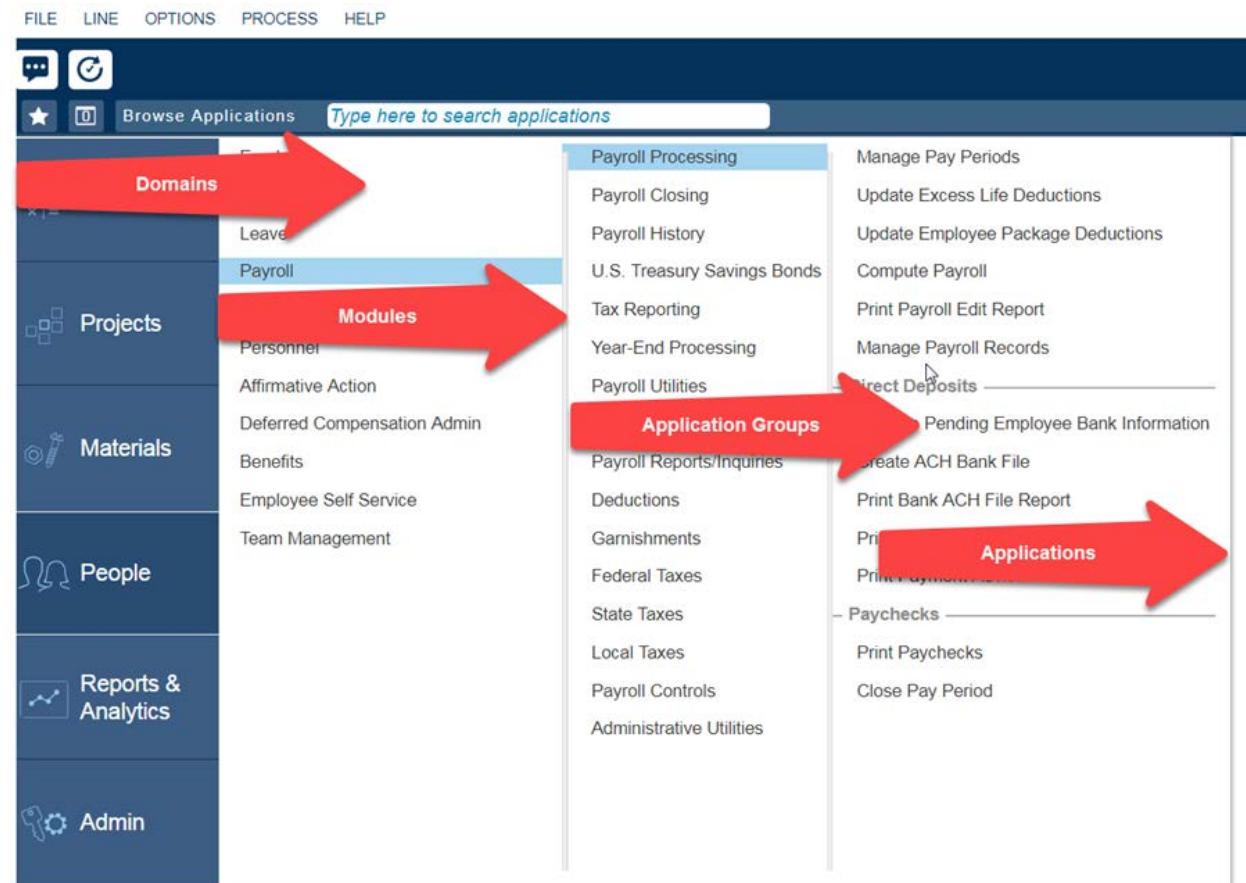
- **Global Menu** - These menu options are always available and provide quick access to frequently used features.
- **Global Toolbar** - These toolbar options are always available and you can configure both display and content.
- **Navigation Toolbar** - This toolbar enables easy navigation and includes a "bread crumb" trail that displays your present location.
- **Application Toolbar** - This toolbar displays in every application. Use it to open new records, make queries, and other tasks.

Domains and Applications:

Domains display in the stacked list on the left side of the screen. The contents of these domains are organized in the three panes located next to the Domain list, "drilling down" as you proceed rightward. Proceeding from left to right, these panes display:

- The available modules for the selected domain
- The application groups for the selected module
- The applications within the selected application group

GETTING STARTED WITH COSTPOINT



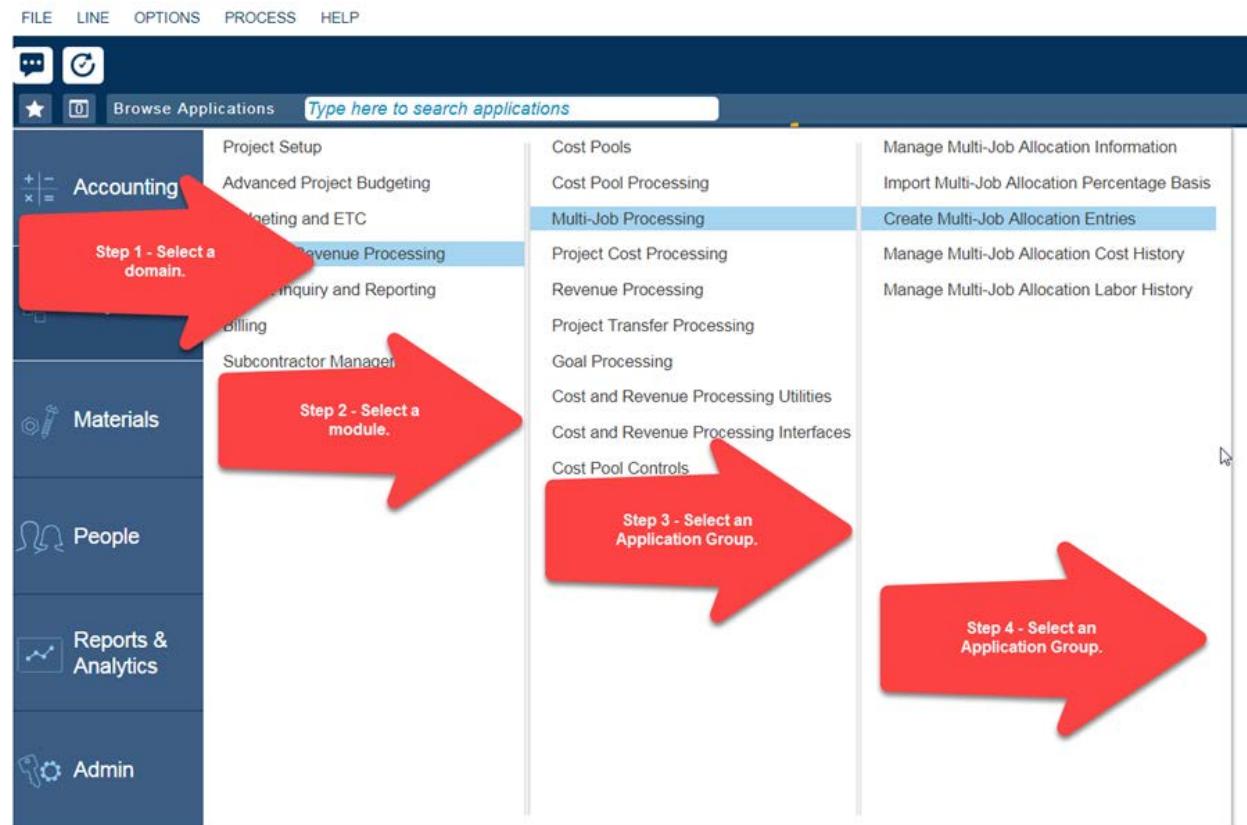
- **Domains** - This column displays Costpoint domains, and also displays other purchased products. In this example, the Costpoint Accounting domain is selected.
- **Modules** - This pane displays modules that belong to the selected domain. In this example, all modules that belong to the Costpoint Accounting domain display.
- **Application Groups** - This pane displays application groups for the selected module. In this example, the pane displays application groups for the General Ledger module.
- **Applications** - This pane displays applications for the selected application group, in this case the Company Calendar group.

GETTING STARTED WITH COSTPOINT

NAVIGATING THE USER INTERFACE

The user interface is organized into program areas or domains. The Navigation screen displays these domains in the stack on the left side. These domains are further categorized in a series of three panes. Starting from left to right, you can navigate from the highest-level program domain down to the desired application.

You can access the Navigation screen at any time by clicking **Browse Applications** on the Navigation Toolbar.



To navigate the Costpoint User Interface, follow these steps:

1. **Select a Costpoint Domain or product** - Click a domain to display its modules on the next pane.
2. **Select a module** - Click a module to display its application groups on the middle pane.
3. **Select an application group** - Click an application group to display its applications on the right-hand pane.
4. **Select an application** - Click an application to open it. For example, click Manage Fiscal Years to open that application.

You only see those domains, modules, and applications to which you have access rights. If you have questions concerning access/permissions, please contact your administrator.

Searching for an application? Read more about [Costpoint's Search feature](#).

GETTING STARTED WITH COSTPOINT

NAVIGATION TOOLBAR



Navigation Toolbar Menu

Use the items in this menu to select the active company, display active applications, configure your screen and application displays, and manage My Menu.

Toolbar Option	Function
 My Menu Click the My Menu icon to access the My Menu dialog box. My Menu displays a convenient list of your most-used applications. You can easily activate an application included in My Menu by clicking its name from the My Applications list.	 To modify your My Menu, click the Manage My Menu link at the bottom of the dialog box. For more information, see Screen Configuration under Global Options .
 Open Applications Click the Open Applications icon to display a list of currently open applications. The number in the box reflects the number of applications you currently have opened. In this example, the Open Applications icon indicates that two applications are open. Click any application on the list to display that application.  This icon indicates the application contains unsaved data. Click  to close the selected application.	

GETTING STARTED WITH COSTPOINT

Toolbar Option	Function
	<p>Click  Close Inactive  Close All to close inactive or all applications.</p>
<p>Browse Applications <i>Type here to search applications</i></p> <p>Browse Applications</p>	<p>Click Browse Applications to display the basic Domain and Application (user interface) structure. Select a Domain to view its component modules in the first column. From there, you can drill down to view a module's application groups (displayed in the second column) and, finally, the individual applications belonging to that group in the third column. Click an application to activate it.</p> <p>For more information, see Navigating the User Interface.</p>
<p>Browse Applications > Accounting > Accounts Payable > Voucher Processing > Create Recurr</p> <p>"Bread Crumb" Trail</p>	<p>The "Bread Crumb" trail displays in the center of the Navigation Toolbar whenever you view and work in an application, so you always know your current location, as well as the path you took to get there. The Bread Crumb trail also provides convenient navigation, since you can click any item in the trail (for example, a domain, module, or application group) to go to that location. As an example, you can click Billing to go directly back to the Billing module.</p>
 System Message(s)	<p>Click  to display administrative messages. This icon displays for the logged-</p>

GETTING STARTED WITH COSTPOINT

Toolbar Option	Function
 User Preferences Click  to modify displays for your Global Toolbar, current application layout, and My Menu. <ul style="list-style-type: none"> • Application Layout Changes - Click Save to retain the current application display. For example, you might want a specific subtask to automatically display every time you access a particular application. You can also save the order of the columns for a particular table. Click Reset to revert to the default settings for this application. • Global Toolbar Icon Options - Click Edit to configure the Global Toolbar. You can rearrange the display of function icons, as well as add or remove them. You can also choose whether to display function labels for the icons. Your configurations apply for each 	in user only if there are system messages for the user to see.

GETTING STARTED WITH COSTPOINT

Toolbar Option	Function
	<p>application type. For instance, if you configure the Global Toolbar in the Manage Project Billing Information application, that configuration applies to all applications. Click Reset to return the toolbar display to the default setting.</p> <ul style="list-style-type: none"> • Auto Positioning On - In the Classic view of the UI, select this check box to resize applications to fully utilize screen space. • Manage User Profiles - Select the user profile you want to view from the list. Click Manage Profile to open the user profile. <p>All applications must be closed to access User Profiles. If applications are open, click Close Applications to close them or click View Applications to identify the open applications and then close them.</p> <p>Click the Configure User Preferences link at the bottom of the window to modify</p>

GETTING STARTED WITH COSTPOINT

Toolbar Option	Function
	<p>the contents of My menu in the Configure User Preferences screen. From the My Menu Application List in the bottom left pane, click the column with the check adjacent to each application you wish to add to My Menu (CTRL+Click for multiple applications). And then click the Select button. The applications you selected display in the My Menu pane on the bottom right. To save your updated preferences, click File » Save from the Global Menu, or click  Save from the Global Toolbar.</p>
 Select Company	<p>Click  to select a company from a list of available companies. Choose a different company from the list and click Change Company.</p> <p>You must close all open applications for the active company before you can switch to another company. If applications are open, click Close Applications to close them or click View Applications to identify the open applications and then close them.</p> <p>You can then access data for the designated company through My Menu or Browse Applications.</p>

GETTING STARTED WITH COSTPOINT

Toolbar Option	Function
	You must save database changes and exit all open applications for the current company before you can switch to another company.
Sign Out	Click  to exit.

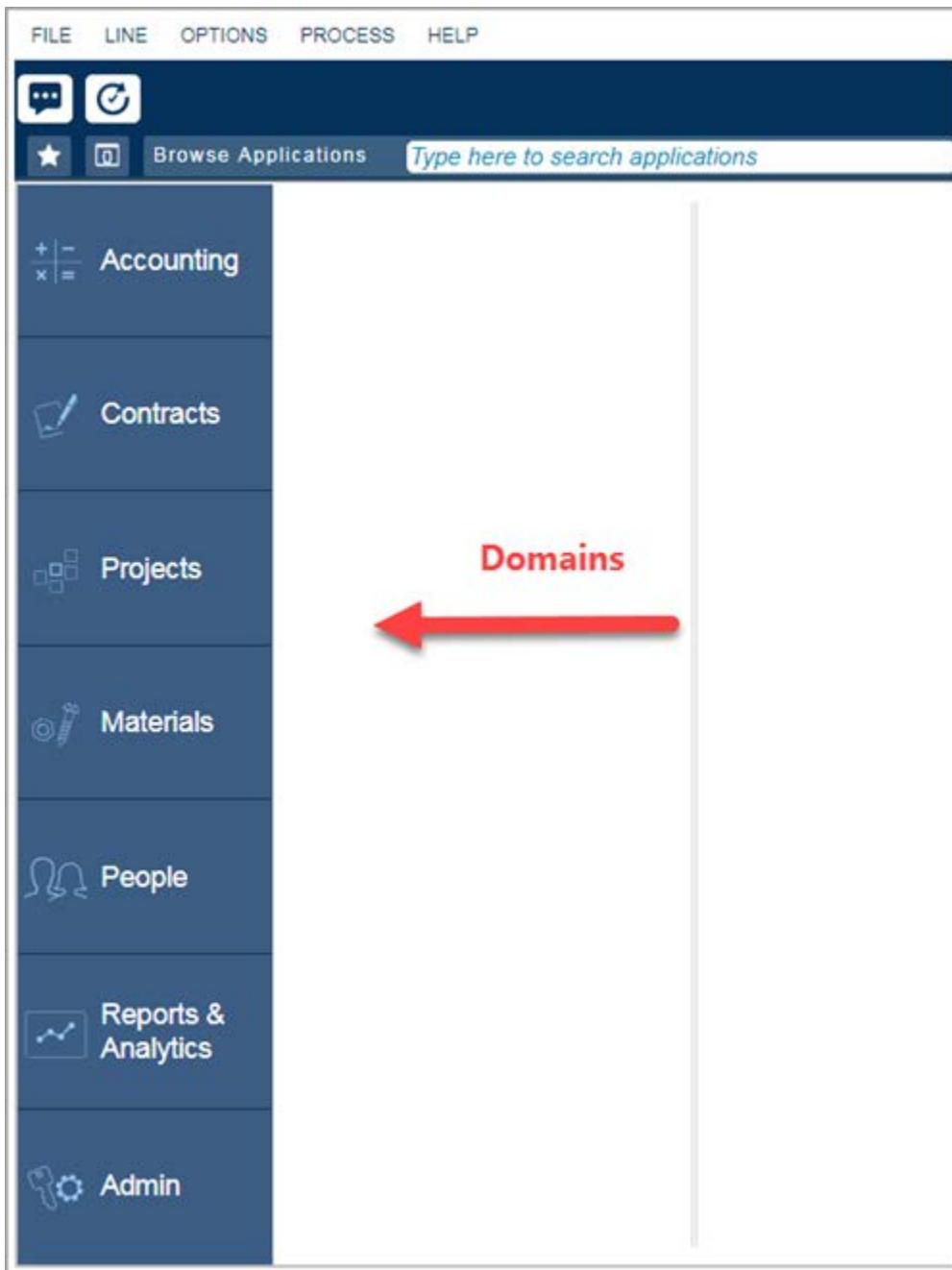
COSTPOINT DOMAINS OR PRODUCTS

Data comprising Deltek Costpoint are categorized into domains. Domains represent the top level of the Costpoint hierarchy and always display in a stack on the left side of the Costpoint Navigation screen. When you click a domain, the modules for that domain display in the first pane to the immediate right of the domain list.

There are six domains in Costpoint:

- Accounting
- Contracts
- Projects
- People
- Materials
- Reports & Analytics
- Admin

GETTING STARTED WITH COSTPOINT



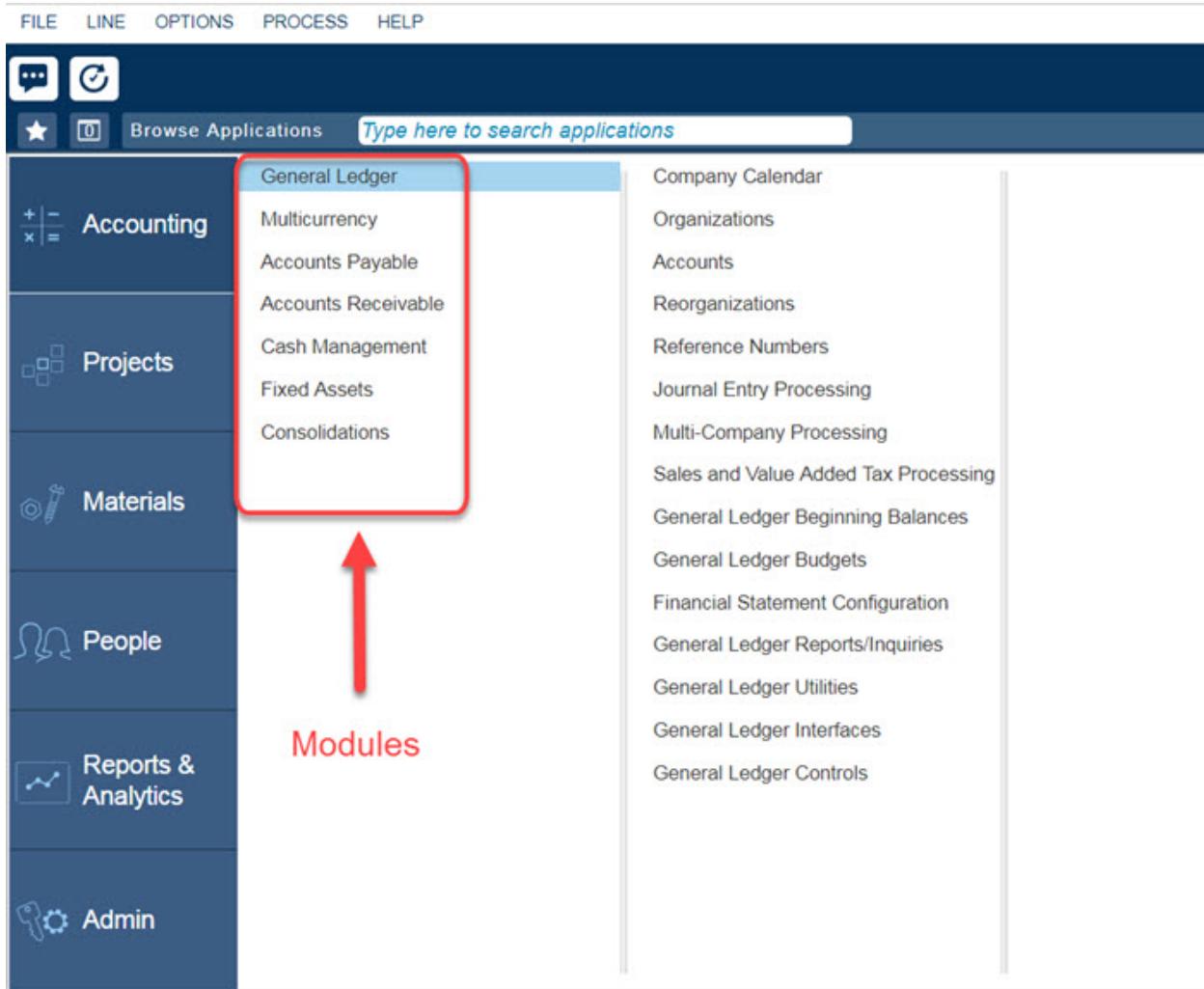
Deltek Costpoint is organized by domains as displayed in the above pane. To view the various modules that comprise a specific domain, click the domain.

If you purchased other products, additional options appear (for example, Time & Expense or Budgeting & Planning).

GETTING STARTED WITH COSTPOINT

MODULES

Each domain is subdivided into modules, which are displayed on the left pane next to the domain list. When you select a module, the list of application groups displays on the second pane.



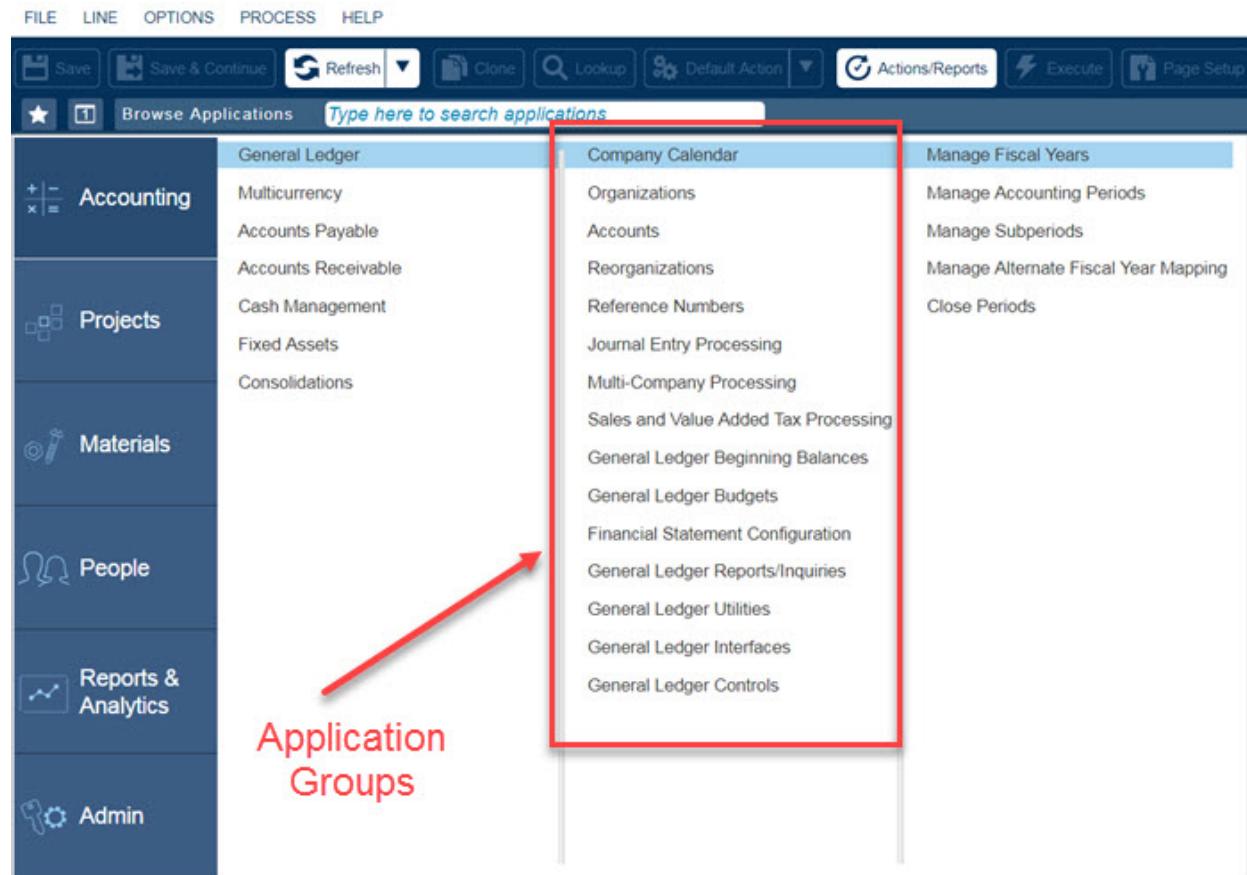
In the example above, when the **General Ledger** module is selected from the left-hand pane, the **General Ledger** application groups (for example, **Company Calendar**, **Organizations**, **Accounts**) display in the next pane immediately to its right.

GETTING STARTED WITH COSTPOINT

APPLICATION GROUPS

Under some modules are application groups that display in the middle pane when a specific module is selected. Note that not all modules have application groups contained in them.

When you click an application group, the list of applications that belong to that group displays on the next pane on the right.



In the example above, when the **Company Calendar** group is selected, applications that belong to that group (for example, **Manage Fiscal Years**, **Manage Accounting Periods**, **Manage Subperiods**, **Manage Alternate Fiscal Year Mapping**, and **Close Periods**) display on the right-hand pane.

GETTING STARTED WITH COSTPOINT

APPLICATIONS

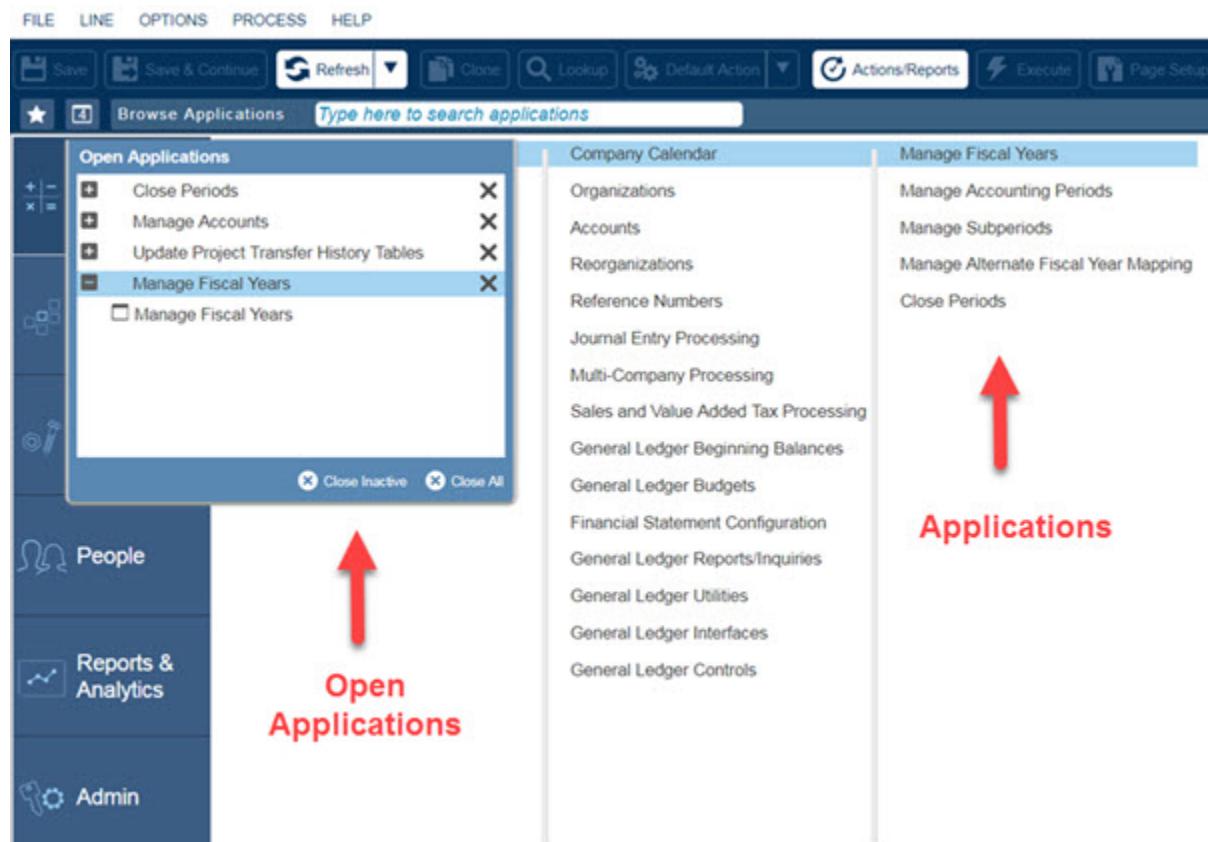
Applications reside in the deepest level of the hierarchy, and they are represented as separate screens.

You can work in separate application screens to carry out a wide variety of tasks, such as:

- Entering data for vouchers, purchase and manufacturing orders, and contracts
- Viewing and editing existing payroll records
- Creating and reviewing various labor, accounts payable, and inventory reports
- Printing and posting reports and checks

The above list represents only a small number of available functions.

There are three convenient methods for accessing applications and navigating between them:



Using the **Navigation** screen. You can access and open applications by drilling down to the appropriate location through the Module/Application Groups/Applications panes.

- Using the **Navigation Toolbar**. After you open more than one application, you can click  (**Open Applications**) from the Navigation Toolbar to select which open application you want to work with. The **Open Applications** dialog box is also a convenient way to close applications without having to display them directly.
- The numeral that displays in the Open Applications icon changes depending on the number of applications that are open. Click it to display the **Open Applications** dialog box. The image below displays the Open Applications dialog box, which opens as a drop-down when you click the icon.

GETTING STARTED WITH COSTPOINT

- Using the **Search** feature. Learn more about accessing an application using the [**Search**](#) feature.

In the **Application** field on the Costpoint Login screen, you can specify the application (through its application ID) that you would like to display by default when you open Costpoint.

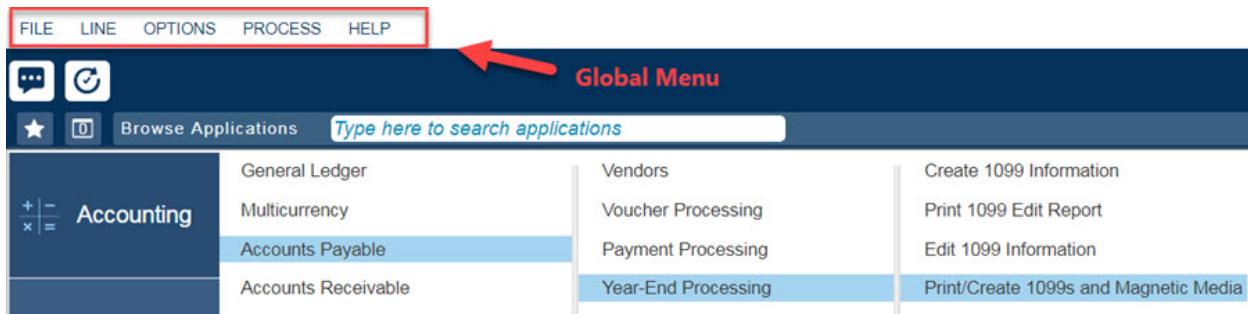
Many applications are organized by task type (for example, reports and inquiries are grouped together in the application list) or topic (for example, W-2s, Electronic Filing, and State and Local Taxes).

GLOBAL MENUS AND TOOLBARS

GLOBAL MENU

The Deltek Global Menu provides easy access to commonly used functions, so you can carry out your tasks quickly and efficiently. Each menu item drills down to reveal options that are applicable to an open application/task or active window. Menu options are presented in two colors:

- **Gray** - Indicates that the option is inactive or is not available for that particular application or active window.
- **Black** - Indicates that the option is active or available for that particular application or active window.



The following menu items are available in the Global Menu:

- **FILE** - Contains options to manipulate database tables and records, including creating new records, saving and deleting them, and logging out.
- **LINE** - Contains options to add, delete/undelete, copy, or toggle between lines/selections. Line menu options are only available at the table window level.
- **OPTIONS** - Contains options to select company data, search for data and records, navigate through records, and modify user preferences.
- **PROCESS** - Contains options to upload and download files as well as select default actions related to the current application.
- **HELP** - Displays online help for a currently displayed function.

GLOBAL FILE MENU

The Global File Menu contains items to manipulate database tables and records, including creating new records, saving and deleting them, and logging out.

The table below describes Global File Menu functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Execute (F3)	<p>Select this option to populate the table window. Costpoint uses the filtering conditions you entered on the top screen. If you have not yet entered data (for example, when you have just opened the application), you can click Execute to retrieve all available database rows permitted by the business rules.</p> <p>Click  to launch Execute from the Global Toolbar.</p>
Clone Record (F4)	<p>Click Clone Record to create a new record that retains information from an existing record.</p> <p>After you create a new record by cloning an existing record, you can edit the data in the new record.</p> <p>Use the Toggle View option on the Application Toolbar to switch back and forth between the new record and the existing record.</p> <p>Clone is not available for all functions.</p>
Save (F5)	<p>Select this option to save your data to the database.</p> <p>Click  to use this feature from the Global Toolbar.</p>
Save & Continue (F6)	<p>This menu option saves your input without clearing the screen, which allows you to continue working on the current record.</p> <p>Click  to use this feature from the Global Toolbar.</p>
Refresh	<p>Select this item to display a submenu with four Refresh options. These options allow you to refresh all or part of an application. Generally, refreshing an application returns it to the state it was in when you opened it, reversing any changes you have made to records on the screen and restoring those records to the state they were in when you first loaded them from the database.</p> <ul style="list-style-type: none"> ● Clear All - Use this option to do the following: <ul style="list-style-type: none"> ■ Cancel all edits you made since opening the application, and ■ Restart the application. <p>Costpoint deletes all the changes you made to your queried data since opening the application and then restarts your session.</p> ● Refresh All - Use this option to do the following: <ul style="list-style-type: none"> ■ Cancel all edits made in the current application, and ■ Re-execute all current queries for all currently opened screens within the application.

GETTING STARTED WITH COSTPOINT

Menu Option	Function
	<p>Costpoint only re-executes a query if you previously executed one in the current session.</p> <ul style="list-style-type: none"> ● Refresh Subtask - Use this option to refresh the current subtask. Costpoint deletes all edits for a single document that you have made both under that subtask and its subordinate subtasks, if any. Data on the header record and on other subtasks do not refresh. This option is available only within a subtask. ● Refresh Document - Use this option to refresh the currently selected document. Costpoint refreshes the data on the current header row and all its supporting details. Costpoint removes all previous edits. This option applies to documents (header records) only. You cannot refresh a new row since it does not yet exist in database. <p>This option enables only for the top level, at the root of the document. This option is disabled for subtasks.</p> <p>Click  to open this feature from Global Toolbar.</p>
Print Options (CTRL+ALT+P)	<p>Select this item to display the Print Options dialog box, where you can review and modify your printer options. Choose the destination for your output (for instance, system or local printer, file, email, download, or archive), select specific pages for printing, number of copies, and more.</p> <p>Click  to open this feature from the Global Toolbar.</p>
Page Setup	<p>Select this item to display the Page Setup dialog box, where you can specify your report's layout. You can choose the font, layout (landscape or portrait), paper size, margins, and whether to include your company logo and name.</p> <p>Click  to open this feature from the Global Toolbar.</p>
Preview Default Report (CTRL+SHIFT+V)	<p>Select this item to display a preview of the current report. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.</p> <p>For most non-report applications, three options are available to print the records:</p> <ul style="list-style-type: none"> ● Current Record Information - Vertical Layout ● Current Record Information - Horizontal Layout ● Queried Records Information - Horizontal Layout <p>Click  to open this feature from the Global Toolbar.</p>
Print Default Report (CTRL+SHIFT+P)	<p>Select this item to print the current report. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes.</p> <p>Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.</p> <p>For most non-report applications, three options are available to print the records:</p>

GETTING STARTED WITH COSTPOINT

Menu Option	Function
	<ul style="list-style-type: none"> ● Current Record Information - Vertical Layout ● Current Record Information - Horizontal Layout ● Queried Records Information - Horizontal Layout <p>Click  to open this feature from the Global Toolbar.</p>
Export to Excel (CTRL+SHIFT+E)	<p>Select this item to export the current report to Microsoft Excel. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes, except the report output is automatically set to Excel format.</p>
Close Application (CTRL+W)	<p>Select Close to exit the current Costpoint application. When you click Close Application from the Global Menu, Navigation Menu (in Open Applications ) or Application Toolbar will not exit Costpoint.</p> <p>Click  to close the current application from the Application Toolbar.</p>
Log Out (CTRL+SHIFT+F12)	<p>Select this option to exit Costpoint, including all currently active Costpoint applications. If you have unsaved changes, you will have the opportunity to cancel and save your new data before you exit Costpoint.</p> <p>Click  to log out of Costpoint from the Navigation Toolbar.</p>

GETTING STARTED WITH COSTPOINT

GLOBAL LINE MENU

The Global Line Menu contains options to add, delete, and undelete lines. Options under the Line menu are only available at the table window level. If the options are not available, it is usually because no table window is present on the screen.

The table below describes Global Line Menu functions for Costpoint and includes available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
New Record (F2)	<p>Select New Record from the Line menu to create a new line at the end of a table window for input of new data. Use this function when beginning work with any table window. Most transaction screens require this to begin the "line" portion of the input.</p> <p>Click  to open this feature from the Application Toolbar.</p>
Copy Record (CTRL+E)	Select Copy Record to duplicate a line.
Copy Data to Insert into Excel	Select this option to copy the line to Microsoft Excel.
Copy Data to Paste into New Record(s)	Select this option to copy the line as another parent record.
Paste Data	Select this option if you just copied a line and want to paste it as a new line.
Paste Data from Excel	Select this option to paste a line from Microsoft Excel
Delete Record (CTRL+DEL)	<p>Select Delete Record from the Line menu to designate deletion of a specified line of data from a table window. An  displays in this box and indicates that the next time you save your data, the row will be deleted.</p> <p>Click  to use this feature from the Application Toolbar.</p>

GETTING STARTED WITH COSTPOINT

Menu Option	Function
Undelete Record (CTRL+DEL)	<p>Select Undelete Record from the Line menu to reverse the previous menu option. For example, with table window lines, you can remove the designation for deleting a particular line. This removes the  from the far left column.</p> <p>Click  to use this feature from the Application Toolbar.</p> <p>Note that the Undelete Record option appears only when an actual record has been deleted.</p>
Toggle Row Selection (SHIFT+F7)	Use this option to select or deselect a row on an active screen.
Force Object Validation (CTRL+ALT+V)	<p>Use this option to validate the current field. Costpoint validates data for business logic at either the server or browser level, depending on the complexity of the calculation.</p> <p>This option is necessary only in Record and Application validation frequency modes.</p>
Force Line Validation (ALT+SHIFT+V)	<p>Use this option to validate the current record. Costpoint validates data for business logic at either the server or browser level, depending on the complexity of the calculation.</p> <p>This option is necessary only for the Application validation frequency mode.</p>

GLOBAL OPTIONS MENU

The Global Options Menu contains items to select company data, search for data and records, navigate through records, and modify user preferences.

The table below describes the functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Select Company	<p>Select this item to display the Select Company dialog box. The drop-down list displays available companies. Choose a different company from the list and click Change.</p> <p>You must exit all open applications for the active company before you can switch to another company.</p> <p>Click  to open this feature from the Navigation Toolbar.</p>
Lookup (F10)	<p>Select this feature to look up and select available values in cases where you are unsure of the ID or code you need to complete a particular field.</p> <p>The Lookup dialog box displays a table containing the values that are available for entry into a specific screen field. You can either scroll through the displayed values or look up a specific value. When you select a value in Lookup, Costpoint transfers that value to the field from which you launched Lookup. If you place your cursor in a character field (non-numeric and non-date), you can enter the first few letters of the data you are looking for and Costpoint will automatically filter using this data.</p> <p>Certain fields also contain the Lookup feature. These fields display a thick blue line on the right side:  1. Mouse-over the blue line to display the Lookup icon:  . To display the Lookup dialog, click the Lookup icon or press F10 on your keyboard.</p> <p>Note that Query is also available from Lookup. When unavailable, the Lookup toolbar icon is shaded.</p> <p>Click  to access Lookup from the Global Toolbar.</p> <p>See Lookup for more information.</p>

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Menu Option	Function
Query (F11)	<p>Select Query to set up a data query and define parameters for your database search. The Query dialog box will appear once you click Query.</p> <p>On the Find tab, use the Search Criteria fields to narrow your search by specifying key words. The available fields vary depending on the type of application.</p> <p>On the Query tab, use the Query Condition fields to indicate search parameters by specifying field conditions.</p> <p>On the Sort tab, use the Sort Records By fields to specify the order in which they should be sorted.</p> <p>On the Saved Queries tab, you will see the previously created queries that are stored in Costpoint. You can select among the list and use it as your query.</p> <p>Click the Count button to display the number of records that the query will return based on your parameters. You can then modify your parameters to narrow your search results, if necessary.</p> <p>Click the Search button to display the result set. Under the Form View you can page through the result set records when you use the forward and buttons. Or, under Table View, highlight the row you want to review or modify. You can modify the selected record directly from the table grid as well as launch associated functions.</p> <p>Open the Saved Queries tab to display a list of your saved queries.</p> <p>See Query for more information.</p> <p>Click to access Query from the Application Toolbar.</p>
First (CTRL+UP ARROW)	<p>Click First to call up the first row in the Query result set and make it available for review or editing. This item disables and is shaded if the current row is actually the first row in the result set.</p> <p>Click to access the First record from the Application Toolbar.</p>
Previous (CTRL+LEFT ARROW)	<p>Click Previous to call up the row immediately previous to the currently active row in the Query result set and make it available for review or editing. This function disables if the current row is the first row in the result set.</p> <p>Click to access the Previous record from the Application Toolbar.</p>
Next (CTRL+RIGHT ARROW)	<p>Click Next to bring up the row immediately following the currently active row in the Query result set and make it available for review or editing. This function disables if the current row is the last row in the result set.</p> <p>Click to access the Next record from the Application Toolbar.</p>
Last (CTRL+DOWN ARROW)	<p>Click Last to bring up the last row in the Query result set and make it available for review or editing. This function disables if the current row is actually the last row in the result set.</p> <p>Click to access the Last record from the Application Toolbar.</p>

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Menu Option	Function
Toggle View (ALT+CTRL+T)	After you create a new record by cloning an existing record, use this option to switch back and forth between the new record and the existing record. This is particularly useful for Form View-only screens.
Switch to Table/Form View (CTRL+M)	<p>Click Switch to Table View or Switch to Form View to change the display format between Form View and Table View.</p> <p>In Table View, click  from the Application Toolbar to switch to Form View.</p> <p>In Form View, click  from the Application Toolbar to switch to Table View.</p>
Reset Default Positioning and View (SHIFT+ALT+Z)	Use this option to return objects within an application (for instance, tables and screens) to their default positions, and to return the current application to the view (Table or Form) in which it displayed when you activated it.
System Message(s)	Click System Messages(s) to view system messages and alerts in a display box at the bottom of the screen.
Screen Configuration	<p>Click Screen Configuration to modify the layout of the current application and make changes to your Navigation Toolbar and My Menu.</p> <p>Top-Level Toolbar - Click Modify to configure the Navigation Toolbar. You can rearrange the display of function icons, as well as add or remove them. You can also choose whether to display function labels for the icons. Your configurations apply for each application type. For instance, if you configure the Navigation Toolbar on the Manage Project Billing Information application, that configuration will apply for all Data Entry applications in Costpoint.</p> <p>The application type (for example, Processing, Data Entry, or Reporting) of the current application displays on the second line of this section.</p> <p>Click Reset to return the toolbar display to the default setting.</p> <p>Current Application Layout - Click Save to retain the current application display. For example, you might want a particular subtask to display automatically every time you access a particular application. Click Reset to revert to the default settings for this application.</p> <p>My Menu - Click Manage to display the Configure User Preferences screen, where you can modify the contents of My Menu. From the My Menu Application List in the bottom left pane, select the check box for each application you wish to add to My Menu. Then click the Select button. The applications you selected display in the My Menu pane on the bottom right.</p> <p>Click File » Save from the Global Menu, or click  from the Global Toolbar, to save your updated preferences.</p> <p>Click  from the Navigation Toolbar to access this feature.</p>

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Menu Option	Function
User Preferences	<p>This screen consists of areas of user preferences and information:</p> <ul style="list-style-type: none"> ● User Information — Review or modify your reporting company, password, default information, default delivery options, and phone. ■ Password Information — Review or modify your access password. Learn more about this feature. ■ Default Report Delivery Options — Select the default delivery mode for reports. Options include System Printer, Download, Email and so on. ■ Phone — Modify your phone number and extension. ■ Notify When Batch Process/Report Is Completed — Select this check box if you want Costpoint to notify you once it completes a batch process or generates a report. ● Change Default Period — Click this link to display the Change Default Period subtask, where you can modify the default fiscal year, period, and subperiod for the current module. These defaults are used by many transaction functions in Costpoint. Learn more about this feature. ● UI Profiles — Administrators can use this subtask to pre-configure different settings for user groups as a whole. ● My Menu Application List — This table lists all Costpoint applications that are available for inclusion in the My Menu list. To include an application in My Menu, highlight the application (highlight multiple applications using CTRL + Click) and click the Select button. Costpoint moves the applications to the My Menu list. ● My Menu — My Menu provides convenient access to your favorite applications. Provided that you have authorization, you can modify your My Menu settings here. <p>Click  to access My Menu from the Navigation Toolbar.</p> <p>Learn more about this feature.</p> <ul style="list-style-type: none"> ● Default My Menu — Click this link to display the Default My Menu subtask, where you can set up customized My Menus for specific users.
Arrange Table Columns	<p>Select this menu item to open the Arrange Table Column dialog box, where you can Move Up or Move Down a specified column. Enter the number of columns you will lock when you scroll to the right in the Locked columns on left side field.</p> <p>Click Apply to save changes, and click Close to exit the dialog box.</p> <p>To make changes permanent, save the Application Layout after clicking Apply.</p>

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Menu Option	Function
Show/Hide Screen Controls (SHIFT+F3)	<p>Click this menu item to display the Show/Hide Screen Controls dialog box, where you can choose to display or hide screen controls such as input text fields, check boxes, combo boxes, radio buttons, group boxes, labels, screen tabs, subtask links, table/form, query, and records selected. You can also right-click on a field or screen control name and then click Show/Hide Screen Controls to display the dialog box.</p> <p>On the dialog box, click Data Fields, UI Controls, or Toolbar Controls to see the options available. Select the Always Hide check box next to the item(s) you want to hide, and then click Apply. Costpoint automatically hides the selected item(s) in Form and Table views. Click Close to exit the dialog box.</p> <p>To make changes permanent, save the Application Layout after clicking Apply.</p> <p>To display hidden fields, open the dialog box, clear the Always Hide check box, click Apply, and save the Application Layout.</p>
Show/Hide Messages & Errors (SHIFT+F3)	<p>Click this menu item to display or hide the Messages & Errors window at the bottom of the Navigation screen. This window is hidden by default. It normally displays in the following two situations:</p> <ul style="list-style-type: none"> ● When the user's actions within an application trigger a warning, error, or status notification. ● When the user manually selects the Show/Hide Messages & Errors option from with the Global Options Menu or the Global Toolbar. <p>Click  from the Global Toolbar to display the Messages and Errors window.</p> <p>Click  from the Global Toolbar to hide the Messages and Errors window.</p>
Next Application (CTRL+J)	<p>Click Next Application to shift the display to the next open application. Costpoint shifts through the active applications in the order you opened them. This menu option is disabled if you have only one active application.</p>
Next Window (CTRL+B)	<p>Select Next Window to shift the display to the next window within the application.</p>
Next Tab (CTRL+TAB)	<p>Select this menu item to display the next tab for the current application. The tab order moves from left to right.</p>
Attached Documents	<p>Select this menu item to open a subtask that displays attached documents from Content Management system.</p>
Attached Emails	<p>Select this menu item to open a subtask that displays attached emails from Content Management system.</p>

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Menu Option	Function
Approval	Select this menu item to request or give approval for an action.

GLOBAL PROCESS MENU

Global Process Menu contains options to upload and download files, as well as, select default actions related to the current application

The table below describes Costpoint Global Process Menu functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Action Menu	Click Action Menu to display a submenu of available actions that you can launch for the current application.
Default Action (CTRL+SHIFT+R)	Click Default Action to launch the default action in the current result set. For example, when running an import screen, click this option to initiate the import process.
View Action and Report Status	Click View Action and Report Status to launch a screen that helps monitor the overall workload on the job server and view the status details of the jobs being processed.
File Upload	Click File Upload to display the File Upload Manager, where you can specify the path for documents that reside on a different network. Not all file types and sizes are eligible for upload.
File Download	Click File Download to display a dialog box where you can select data files for download, including files from Deltek Time & Expense and Magnetic Media files. You can also use Query to find files for downloading.

GLOBAL WORKFLOW MENU

Global Workflow Menu provides quick access to some common Workflow functions, such as sending email notification that the user has completed a task using the current application. Note that the Workflow Menu only appears when an application screen is in Workflow mode.

The table below describes Costpoint Global Workflow Menu functions. Note that not all menu and toolbar functions are available for all features. Unavailable functions are shaded.

Menu Option	Function
Workflow	<p>Select this option to perform any of the following actions:</p> <ul style="list-style-type: none">● Re-Send Email - Select this option to route workflow activities and messages through email.● Activity Instructions - Select this option to view workflow cases, labels, and values, as well as activity instructions using the Activity Instructions screen.● Complete Activity - Select this option to complete a workflow activity. <p>See Administration » Workflow » Workflow Cases » Monitor Activities and Messages in the online help for more information.</p>

GLOBAL HELP MENU

The online help function is easily accessible when you click **Help** on the Global Menu.

When you click **Help » Help** for a currently displayed application or screen, the online help for that particular application displays. If the current screen is a subtask, the online help for the main screen displays. If there is no active screen, the Table of Contents and welcome screen display.

The table below describes Global Help Menu functions. Note that not all menu and toolbar functions are available for all features.

Help Menu	Function
Help (SHIFT+F1)	<p>This option displays the Table of Contents for the complete Help.</p> <p>You can either access the Help using the Local version which is embedded in the software during installation or you can use the Hosted Help version which can be accessed through the Web and is updated periodically. Users do need Internet access to use the hosted help.</p> <p>When you click Shift+F1 or HELP » Help, the appropriate help topic displays regardless if you are using hosted or local help.</p> <p>Costpoint is configured to use local help by default. To change this, select Use Hosted Online Help on the Logging tab in the Configuration Utility.</p> <p>To ensure that you always have the most current version of the help, Deltek strongly recommends using hosted help. Otherwise, you will need to download help updates periodically from DSM.</p>
Release Notes	<p>This option displays the Release Notes for Costpoint.</p> <p>The Release notes option lists links to all release notes for the recent Costpoint, Budgeting and Planning, and Time and Expense releases. Links to other product documentation are available as well. This allows you to access all pertinent documentation from the product, as well as from the online help.</p>

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Help Menu	Function
About	<p>The View Help About screen provides information about your Costpoint system, displayed in the following sections:</p> <ul style="list-style-type: none"> ● General Information - This section displays the version number for the current version of Costpoint, Budgeting & Planning, and/or Time & Expense, plus System, Company, and Validation Frequency information. ● Open Applications - Click this subtask link to view a table that lists currently active applications, their application IDs, and screen customization and extensibility unit status. ● Transactional DB Patches - Click this subtask link to display a table list of transactional database patches for the current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ● Administrative DB Patches - Click this subtask link to display a table list of administrative database patches for the current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ● Metadata DB Patches - Click this subtask link to display a table list of metadata database patches for the current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ● Budgeting & Planning DB Patches - Click this subtask link to display a table list of database patches for the current version of Budgeting & Planning. The table includes information on version numbers and the dates on which the patches were applied. This subtask is available only when Budgeting & Planning is deployed in the system you are using. ● Time & Expense DB Patches - Click this subtask link to display a table list of database patches for the current version of Time & Expense. The table includes information on version numbers and the dates on which the patches were applied. This subtask is available only when Time & Expense is deployed in the system you are using. ● Customized Labels - The Customized Labels subtask displays the customized labels, if any, that have been entered on the Manage Standard Label Customizations screen. You can use the Manage Standard Label Customizations screen to change how certain standard labels display in Costpoint. For example, if you change Customer to Client, Client displays in place of Customer on screens and reports throughout Costpoint. For more information, review the documentation for the Manage Standard Label Customizations screen. ● Features - Click this subtask link to view a list of features that are installed in Costpoint.
Submit Support Issues	<p>Select this option to report any performance issue to Deltek Customer Support.</p>

Search Help Topics

Use the Table of Contents of the Help to search terms or topics within the Help system.

To search for help topics, do the following steps:

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1. Click the **Search** button to find help topics that contain specific words or phrases.
2. Click **Go** to start the search.
3. Select the **Highlight search results** check box to highlight the instances of your search keywords in the help topics. You can also enter the number of search results you want to display.

GLOBAL TOOLBARS

GLOBAL TOOLBAR

Sample Global Toolbar. Items enabled depend on the application and process.



Global Toolbar Menu

Use the items in this menu to save work to the database, clone records, refresh the current application, manage printing tasks, and many other functions.

You can configure this toolbar for each application type. To modify the Global Toolbar, click  on the right-hand side of the screen, and then select **Modify** across the **Top Level Toolbar** label. You can rearrange, remove, or add functions, and choose whether or not to display labels with the icons.

Toolbar Option	Function
 Save	Click  to save your data to the database.
 Save & Continue	Click  to save your input without clearing the screen. This allows you to continue working on the current record.
 Refresh	<p>Click  to display a submenu with four Refresh options. These options allow you to refresh all or part of an application. As long as you have not saved your changes, refreshing an application returns it to the state it was in when you opened it.</p> <ul style="list-style-type: none"> ● Clear All - Use this option to do the following: <ul style="list-style-type: none"> ■ Cancel all edits you made since opening the application, and ■ Restart the application. ● Changes made to your queried data since opening the application are deleted, and your session restarted. ● Refresh All - Use this option to do the following: <ul style="list-style-type: none"> ■ Cancel all edits made in the current application, and ■ Re-execute all current queries for all currently opened screens within the application. Only previously executed queries from the current session restart. ● Refresh Subtask - Use this option to refresh the current subtask. This deletes all edits for a single document that you have made both under that subtask and its subordinate subtasks. Data on the header record and on other subtasks do not refresh. This option is available only within a subtask. ● Refresh Document - Use this option to refresh the currently selected document. Costpoint refreshes the data on the current

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Toolbar Option	Function
	<p>header row and all its supporting details. Costpoint removes all previous edits. This option applies to documents (header records) only. You cannot refresh a new row since it does not yet exist in the database.</p> <p>This option enables only for the top level, at the root of the document. This option is disabled for subtasks.</p>
 Clone Record	<p>Click  to create a new record containing the same information as an existing record.</p> <p>After you create a new record by cloning an existing record, you can edit the data in the new record. Use the Toggle New/Existing Records View option on the Application Toolbar to switch back and forth between the new record and the existing record.</p>
 Lookup	<p>Click  to select available values in cases where you are unsure of the ID or code you need to complete a particular field.</p>
 Default Action	<p>Click  to launch the default action in the current result set. For example, when running an import screen, click this option to initiate the import process.</p> <p>This icon includes a drop-down list  that offers access to available actions for the current result set. The first action in the list is the default action.</p>
 View Action and Report Status	<p>Click  to launch a screen that helps monitor the overall workload on the job server and view the status details of the jobs being processed.</p>
 Execute	<p>Click  to populate the table window. Costpoint uses the filtering conditions you entered on the top screen. If you have not yet entered filtering parameters (for example, when you have just opened the application), you can click Execute to retrieve all available database rows permitted by the business rules.</p>
 Page Setup	<p>Click  to configure your report display options. Choose from Portrait and Landscape layouts, select margins and paper sizes, fonts, and whether to include footers and your company name and logo.</p>
 Print Options	<p>Click  to display the Print Options dialog box, where you can change your printer options. Choose the destination for your output (for instance, system or local printer, file, email, download, or archive), select specific pages for printing, number of copies, and more. See Print Options for more information.</p>

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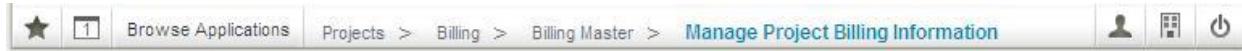
Toolbar Option	Function
 Preview Menu	<p>Click  to display a preview of the current report. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.</p> <p>For most non-report applications, three options are available to print the records:</p> <ul style="list-style-type: none"> • Current Record Information - Vertical Layout • Current Record Information - Horizontal Layout • Queried Records Information - Horizontal Layout
 Print Menu	<p>Click  to print a report using your default settings. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes.</p> <p>Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.</p>
 Reset Default Positioning and View	<p>Click  to return objects within an application (for instance, tables and screens) to their default positions, and to return the current application to the view (Table or Form) in which it displayed when you activated it.</p>
 Show Messages & Errors	<p>Click  on the Global toolbar to display the Message(s)/Error(s) window.</p> <p>Click  on the Global toolbar to hide the Message(s)/Error(s) window.</p> <p>The Message(s)/Error(s) window is hidden by default. It normally displays in the following two situations:</p> <ul style="list-style-type: none"> • When the user's actions within an application trigger a warning, error, or status notification. • When the user manually selects the Show Messages & Errors option from with the Global Options Menu or the Global Toolbar.
 Workflow	<p>This option is only available when an application screen in Workflow mode.</p> <ul style="list-style-type: none"> • Re-Send Email - Select this option to route workflow activities and messages through email. • Activity Instructions - Select this option to view workflow cases, labels, and values, as well as activity instructions using the Activity Instructions screen. • Complete Activity - Select this option to complete a workflow activity.

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Toolbar Option	Function
	See Administration » Workflow » Workflow Cases » Monitor Activities and Messages in the online help for more information.

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NAVIGATION TOOLBAR



Navigation Toolbar Menu

Use the items in this menu to select the active company, display active applications, configure your screen and application displays, and manage My Menu.

Toolbar Option	Function
 My Menu	<p>Click  to access the My Menu dialog box. My Menu displays a convenient list of your most-used applications. You can easily activate an application included in My Menu by clicking its name from the My Applications list.</p> <p>To modify your My Menu, click the Manage My Menu link at the bottom of the dialog box. For more information, see Screen Configuration under Global Options.</p>
 Open Applications	<p>Click  to display a list of currently open applications. The number in the box reflects the number of applications you currently have opened. In this example, the Open Applications icon indicates that two applications are open.</p> <p>Click any application on the list to display that application.</p> <p> This icon indicates the application contains unsaved data.</p> <p>Click  to close the selected application.</p>

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Toolbar Option	Function
	<p>Click  Close Inactive  Close All to close inactive or all applications.</p>
<p>Browse Applications <i>Type here to search applications</i></p> <p>Browse Applications</p>	<p>Click Browse Applications to display the basic Domain and Application (user interface) structure. Select a Domain to view its component modules in the first column. From there, you can drill down to view a module's application groups (displayed in the second column) and, finally, the individual applications belonging to that group in the third column. Click an application to activate it.</p> <p>For more information, see Navigating the User Interface.</p>
<p>Browse Applications > Accounting > Accounts Payable > Voucher Processing > Create Recurr</p> <p>"Bread Crumb" Trail</p>	<p>The "Bread Crumb" trail displays in the center of the Navigation Toolbar whenever you view and work in an application, so you always know your current location, as well as the path you took to get there. The Bread Crumb trail also provides convenient navigation, since you can click any item in the trail (for example, a domain, module, or application group) to go to that location. As an example, you can click Billing to go directly back to the Billing module.</p>
 System Message(s)	<p>Click  to display administrative messages. This icon displays for the logged-</p>

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Toolbar Option	Function
	in user only if there are system messages for the user to see.
 User Preferences	<p>Click  to modify displays for your Global Toolbar, current application layout, and My Menu.</p> <ul style="list-style-type: none"> ➊ Application Layout Changes - Click Save to retain the current application display. For example, you might want a specific subtask to automatically display every time you access a particular application. You can also save the order of the columns for a particular table. Click Reset to revert to the default settings for this application. ➋ Global Toolbar Icon Options - Click Edit to configure the Global Toolbar. You can rearrange the display of function icons, as well as add or remove them. You can also choose whether to display function labels for the icons. Your configurations apply for each

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Toolbar Option	Function
	<p>application type. For instance, if you configure the Global Toolbar in the Manage Project Billing Information application, that configuration applies to all applications. Click Reset to return the toolbar display to the default setting.</p> <ul style="list-style-type: none"> • Auto Positioning On - In the Classic view of the UI, select this check box to resize applications to fully utilize screen space. • Manage User Profiles - Select the user profile you want to view from the list. Click Manage Profile to open the user profile. <p>All applications must be closed to access User Profiles. If applications are open, click Close Applications to close them or click View Applications to identify the open applications and then close them.</p> <p>Click the Configure User Preferences link at the bottom of the window to modify</p>

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Toolbar Option	Function
	<p>the contents of My menu in the Configure User Preferences screen. From the My Menu Application List in the bottom left pane, click the column with the check adjacent to each application you wish to add to My Menu (CTRL+Click for multiple applications). And then click the Select button. The applications you selected display in the My Menu pane on the bottom right. To save your updated preferences, click File » Save from the Global Menu, or click  Save from the Global Toolbar.</p>
 Select Company	<p>Click  to select a company from a list of available companies. Choose a different company from the list and click Change Company.</p> <p>You must close all open applications for the active company before you can switch to another company. If applications are open, click Close Applications to close them or click View Applications to identify the open applications and then close them.</p> <p>You can then access data for the designated company through My Menu or Browse Applications.</p>

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Toolbar Option	Function
	You must save database changes and exit all open applications for the current company before you can switch to another company.
Sign Out	Click  to exit.

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APPLICATION TOOLBAR

The table below describes File menu functions, including available shortcut keystrokes.

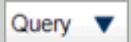
Not all menu and toolbar functions are available for all applications. Functions that are unavailable for a given application do not display.

Application Toolbar

The File menu contains items to manipulate database tables and records, including **Save**, **Delete**, and **Query**.

Menu Option	Function
New New Record (F2)	Click to enter a new record on the screen in either Form or Table View.
Delete Delete (CTRL+DEL)	<p>Click to mark the current record for deletion from both the database and from the Query result set.</p> <p>When you click for a record displayed in Table View, displays in the far left column for that record, while in Form View the displays on the upper left side corner of the application. This indicates that the record is flagged for deletion the next time you save your work to the database.</p> <p>This menu option deletes everything currently on the main screen, including any subtask information. For screens with table windows, this feature deletes all rows on the table window. To delete only one row on a table window, click Delete in the Line menu.</p>
Undelete	<p>Click to undo your most recent deletion.</p> <p>The "marked for deletion" indicator, , no longer displays in the far left column.</p> <p>This option only displays if there is a record marked for deletion. After you mark a particular record for deletion and then Save, you can no longer undelete that record.</p>
Copy ▾	<p>Click the Copy drop-down and select Copy Record to duplicate a record, but not its child records. Choose this option if you want to duplicate only one level of a record (at any level). The other available options are:</p> <ul style="list-style-type: none"> ● Copy Data to Insert into Excel - use this option to copy the record to Microsoft Excel. ● Copy Data to Paste into New Record(s) - select this to copy the record as another parent record. ● Paste Data - select this if you just copied a record and want to paste it as a new record.
Attach	Click to attach a document to the currently selected record.

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Menu Option	Function
 Query (F11)	<p>Click  to populate an application with a result set of database records that are maintained by that application.</p> <p>You can place filters on the query to limit the result set to those records meeting specified selection criteria.</p> <p>For form-type maintenance screens, select Query to set up a data query and define parameters for your database search.</p> <p>Use the Find tab to narrow your search.</p> <p>Use the Sort tab to specify the order in which they should be sorted.</p> <p>Click Find to display the result set.</p> <p>You can also see saved queries on the Saved Queries tab.</p> <p>See Query for more information.</p> <p>Click  to access this function from the toolbar.</p>
 First (CTRL+UP ARROW)	<p>Click  to retrieve and display the first record in the database. In Table View, this is the first row on the main screen or subtask.</p>
 Previous (CTRL+LEFT ARROW)	<p>Click  to retrieve and display the prior record in the database. This would be the record immediately before the one currently displayed.</p>
 Next (CTRL+RIGHT ARROW)	<p>Click  to retrieve and display the next record in the database. This would be the record immediately following the one currently displayed.</p>
 Toggle View (ALT+T)	<p>After you create a new record by cloning an existing record, use this option in Form View to switch back and forth between the new record and the existing record.</p>
 Last (CTRL+DOWN ARROW)	<p>Click  to retrieve and display the final record in the database. In Table View, this is the last row on the main screen or subtask.</p>
 Switch to Form View (CTRL+M)	<p>Click  to change the display format for the current record from Table View to Form View.</p> <p>The Form View icon displays only when the current record displays in Table View.</p>
 Table	<p>Click  to change the display format for the current record from Form View to Table View.</p>

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Menu Option	Function
Switch to Table View (CTRL+M)	The Table View icon displays only when the current record displays in Form View.
 Select This Record  Deselect This Record	Click  to select the current record. Click  to deselect the current record. These options display only in Form View.
 Maximize	Click  to maximize the size of the application screen.
 Restore	Click  to display the default size of the application screen.
 Set Always on Top	Click  to pin or constantly display a subtask of an application even if you use its parent or main screen.
 Email	Click  to view messages related to the current record or to send messages with attachments.
 Close	Click  to close the current application.

APPLICATION FUNCTIONS

APPLICATION FUNCTIONS: GENERAL INFORMATION

This section provides information on fields, options, and buttons used throughout the Costpoint product suite. It also explains terminology and software behavior.

Browse, Add, Change

To browse information, click **Query**. You can use **Query** to locate and display records.

Adding data records or changing existing ones, operates in just one of two modes:

- **Insert Mode** — Use this mode to add data. You can activate the Insert mode by clicking **New** on the toolbar.
- **Update Mode** — Use this mode to edit data. Records automatically display in Update mode so you can edit them.

Main Screens vs. Subtasks

When you select an application, the main screen for that application displays. When you select one of the links located at the bottom of an application, a subtask screen displays. Subtasks collect and store additional information (also known as child data) related to the selected record on the main screen.

Table Windows

When you add, delete, or edit a line while working in table windows, symbols display beside each line that designate which lines will change when you save your table:

- - Indicates rows that contain data you have modified.
- - Indicates rows you have added.
- - Indicates rows you have marked for deletion.

To enter a new row of data into a table window, you must first select the **New Record** option from the Line menu.

Find

To find a value in a column, right-click the column heading and then click **Find**. On the dialog box, enter your search criteria and then click the **Find** button.

Replace

To replace a value in a column, right-click the column heading and then click **Replace**. On the dialog box, enter your replace condition(s) and then click one of these buttons:

- **Replace** – Use this to replace a value on the current row you selected.
- **Replace&Find** – Use this to replace value(s) and find the next row that meets your replace condition(s)
- **Replace All** – Use this to replace all values in the column that matches your replace condition. You can use the **Stop** button to halt the replace process.
- **Find** – This is similar to the **Find** button that you see on the Find tab. Use it to search for a value.
- **Stop** – Use this to halt an ongoing replace process.

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Lock/Unlock Columns

You can freeze a column when you scroll to the right when you apply the Lock Column feature.

To do this, right-click the column heading that you want to lock, and then click **Lock Columns**. You can unlock the column when you right-click its heading and click **Unlock Columns**.

Resize Column

To resize a column, on the column heading, hover to the right border of the column until a bi-directional arrow appears. Click and move the arrow to adjust the column size. You can also right-click the column heading and then click **Resize Column**. Click and move the bi-directional arrow that appears to adjust the column size.

Move Column

To move a column, click the column heading and drag it to a certain position in the table. You can also right-click the column heading, click **Move Column**, and drag the column to a certain position in the table.

Sort Ascending

To sort a column in ascending order (that is, from the lowest value to the highest), right-click the column heading to sort so you can see the sort options available. And then, click **Sort Ascending**.

- For characters, an ascending order will be from A to Z.
- For numeric digits, an ascending order is from the lowest number to the highest.
- If both numeric digits and characters are in the list, numeric digits will be listed before characters.

Sort Descending

To sort a column in descending order (that is, from highest to lowest), right-click the column heading to sort so you can see the sort options available. And then, click **Sort Descending**.

- For characters, a descending order will be from Z to A.
- For numeric digits, a descending order is from the highest number to the lowest.
- If both numeric digits and characters are in the list, characters will be listed before numeric digits.

Arrange Table Columns

You can change the order of the columns in a table window when you click and drag a column heading to a certain position in the table. Another way is to use the Arrange Table Columns dialog box. To open this, right-click any column heading and then click **Arrange Table Columns**. On the dialog box, arrange the order of the columns through the **Move Up** or **Move Down** buttons. Enter the number of columns you will lock when you scroll to the right in the **Locked columns on left side** field. Click **Apply** to save changes, and click **Close** to exit the dialog box.

To return to the original positions of the column headings, click **Options** » **Reset Default Positioning and View** or press SHIFT+ALT+Z.

Show/Hide Screen Controls

To show or hide columns, right-click the column heading and then click **Show/Hide Screen Controls**. On the dialog box, click **Data Fields** or **UI Controls** to see the options available. Select the **Always Hide** check box next to the item(s) you want to hide, and then click **Apply**. The selected item no longer appears in the table layout. Click **Close** to exit the dialog box.

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To make changes permanent, save the Application Layout after clicking **Apply**.

To display hidden columns, open the dialog box, clear the **Always Hide** check box, click **Apply**, and save the Application Layout.

IDs and Codes

When creating IDs and codes or entering them in a field (for example a part ID), you should observe the following guidelines:

- Never embed spaces in **ID** or **Code** fields.
- Never embed single quotes ('') in any field.
- Letters within IDs and codes should all be upper case.

If you are unsure of an ID or code required for a particular field, you can use [Lookup](#) to search and select available values.

Segmented IDs

In certain fields (for instance, account, organization, project, reference number 1, reference number 2, alternate project reporting, and alternate organization), segment separators (periods or dashes) automatically display when you enter a value. These multi-level items are called "segmented ID" fields.

Range Options

Use **Range Options** to limit the scope of records you want to include in a report, process, or inquiry. The system-defined options are:

- **All** - This option allows you to choose all available records in a database table.
- **One** - This option allows you to choose one of the available records in a database table.
- **Range** - This option allows you to choose a specific range of records in a database table.
- **From Beginning** - This option allows you to define a range from the beginning of a database table to a selected ending record.
- **To End** - This option allows you to define a range from a specified beginning record to the end of the database table.
- **Non-Contiguous Range** - Select this check box on the main screen and then use the Non-Contiguous Ranges subtask to select a noncontiguous range of records (for example, projects or employees). This is different from using a regular range because you can include or exclude any records of your choice. You can enter more than one row.

Select/Delete (or Deselect)

Use the **Select** or **Delete** buttons when you make selections and transfer items between two table windows.

- To move data in the top or left window to the bottom or right window, choose an item from the table window or top window and click the **Select** button.
- To remove data in the right or bottom window, choose the item and click the **Delete** button.

OK

Click **OK** to save the current data and return to the previous screen.

Cancel

Click **Cancel** to remove your additions, changes, and deletions and return to the previous screen.

GETTING STARTED WITH COSTPOINT**Logging Out**

To exit, click  on the Navigation Toolbar, click **File** » **Log Out** from the Global Menu, or press **CTRL+SHIFT+F12**.

CLONE RECORD AND COPY RECORD

Use the Clone Record or Copy Record feature to create a new record that contains information from an existing record. The differences of these two features is their availability that depend on the types of records that will be copied. They are not available for all functions.

- Use the Clone Record feature when you copy records that have a header (parent) and detail (child) information.
- Use the Copy Record feature when you copy data that involves just a single record or "child" rows. This is generally used when copying report parameters such as the Print Account List.

After you use clone or copy, the new record displays containing the data you copied except for the key which you must provide.

To clone information, complete the following steps:

1. Open the application where you want to copy a particular record.
2. Once you have opened the application screen, search for the record that you want to copy. You can use **Query** to search for it.
3. When the selected record is displayed, select **File » Clone Record** to copy the record.
4. Enter primary key(s) and any other information that you want to change.
5. Click **Save**.

To copy a line, complete the following steps:

1. Open the application where you want to copy a particular line.
2. Once you have opened the application screen, search for the record that you want to copy. You can use **Query** in the table window to search for it.
3. When the selected line is displayed, select it and go to **Line » Copy Record** or click the **Copy** drop-down on the table window and select **Copy Record**. The other options in the **Copy** button are:
 - **Copy Data to Insert into Excel** - use this option to copy the line to Microsoft Excel.
 - **Copy Data to Paste into New Record(s)** - select this to copy the line into another parent record.
 - **Paste Data** - select this if you just copied a line and want to paste it on the table window.
4. Enter primary key(s) and any other information that you want to change.
5. Click **Save**.

You can select **Save and Continue** after you enter your changes on the screen.

After you create a new record by cloning an existing record, use **Toggle View**  to switch back and forth between the new record and the existing record. This is particularly useful for Form View-only screens.

FILE UPLOAD MANAGER

Use this dialog to select a text file for upload to a database. You can access this dialog from any application by clicking **Process » File Upload** from the Global Menu.

The ID of the application uploaded is tagged to the uploaded file. Since the application ID determines which application you must use to access the file, it is important to upload files from the application in which they will eventually be used.

If you are running an import application (preprocessor), you can use this dialog to select the import file that contains the data you want to import.

To download or delete a file from a database, use the Export Files screen.

There are two ways to work with input files:

- You can access the input file from the network by using Alternate File Locations.
- You can use the File Upload Manager to upload the input file to the database, in which case no further access to network folders is necessary.

File Name

Enter the path and file name of the file you want to upload to the database or to an alternate file location, or click **Browse** to open a dialog and select the file.

Description

Enter a description of the file you are uploading.

Alternate File Location

Enter, or click  to select, the alternate location to which you want the file saved. If you do not specify a location in this field, it tags the file with the application ID and stores it in the database.

Expiration Date

Enter, or click  to select, the expiration date of the file. After this date, the file is eligible for purging on the Export Files screen.

Overwrite?

Select this check box to overwrite any duplicate files that already exist in the database.

Support Issue ID

This field displays when you enter an **Alternate File Location** that is set in the **Case Attachments Root Location** field found on the Configure System Settings screen.

Enter, or click  to select, the Support Issue ID where you want to upload a file attachment.

Upload

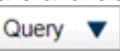
Click this button to upload the file.

Close

Click this button to close the File Upload Manager dialog box.

LOOKUP

Select this feature to look up and select available values in cases where you are unsure of the ID or code you need to complete a particular field.

The Lookup dialog box displays a table containing the values that are available for entry in a specific field on the screen. You can scroll through the displayed values or use  (on the Lookup) to narrow your search. When you select a value, it displays in the field from which you launched the Lookup.

Alternatively, you can place your cursor in a non-numeric or non-date character field and then enter the first few letters of the data that you seek. The records displayed filter automatically, according to your entry.

Certain fields also contain the Lookup feature. These fields display a thick blue line on the right side:

 1. Mouse-over the blue line to display the Lookup icon:  To display the Lookup dialog, click the Lookup icon or press F10 on your keyboard.

Menu Option	Description
Select	Click this button to bring the selected row into the field from which you executed Lookup.
Cancel	Click this button to close Lookup and return to the previous screen. The field from which you executed Lookup remains unchanged.

AutoComplete Feature

Another way of searching for an existing value is to use the AutoComplete feature. This feature is available in fields where the lookup icon is found.

The AutoComplete feature lets you type in the first few characters of an existing code or ID that you are looking for, and then it displays the values that match your entry.

For example, in the **Fiscal Year** field of the Manage Subperiods screen, you enter the value **201**. Costpoint will display the existing values that start with **201** such as **2010, 2011, 2012** and so on.

QUERY

Use Query to define search parameters for data records maintained by the present application. Query is available in form-type maintenance applications.

Using the fields on the **Search Criteria** group box, specify the parameters for your record search.

Find Tab

Search Criteria

Using the fields in this section, select search criteria to narrow your search. You can enter information in one or all fields; however, the more parameters you enter, the narrower your search results.

The search criteria vary depending on both the application and the type of record for which you are searching for (for example, whether you are looking up an employee, voucher, or project). The search criteria vary by type of application. As an example of how **Query** search criteria works, we can look at the Manage Employee Information application. For this application, among the criteria available are

Employee and **Displayed Name**. For both of these items, select from the center drop-down list one of the following relational parameters:

- Is equal to
- Begins with
- Contains

In the corresponding fields on the right, enter values (partial names, letters, and/or numbers) that match the **Employee** and/or **Displayed Name** you are searching for.

To further narrow your search, in the third row, **Status is**, you can select from the drop-down list on the right one of the following options:

- Active
- Family Medical Leave
- Inactive
- Inactive Accruing Leave

After you enter or modify a parameter, click  to preview the number of records Costpoint will return based on your current parameters.

Queries work in this way across applications, and include the following options:

Query Tab

The Query Tab contains additional parameters for your search.

Query Condition

In this section you can enter additional parameters. For example, on the Manage Employee Information screen, some of the parameters included are the following:

- Adjusted Hire Date
- Birth Date
- City
- Contractor

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Select a qualifier in the second field (for example, for **City**, you can choose **Begins with**). In the third field, enter the initial letters for the desired City (for example, "Chi" for Chicago). Click  to add the parameter you have selected to the **Return all records where:** window. Repeat this process to add additional parameters to the **Return all records where:** window. You can then click  to preview the number of records matching your parameters, or click **Query** to display the actual records. Delete a parameter by highlighting it and clicking .

Sort Tab

Use the contents of this tab to arrange the display of your search results. For instance, on the Manage Employee Information screen, select from criteria like **Adjusted Hire Date**, **Contractor**, and **Disabled Veteran** for sorting your record results. Use the Up and Down Arrows  to move a condition up or down in priority. You can delete a sort condition when you highlight it and click .

Sort Records By

From this drop-down list, select any field on which the result set should be sorted.

- **Ascending** - Select **Ascending** if you want the results sorted in ascending order.
- **Descending** - Select **Descending** if you want the results sorted in descending order.

Add Sort Parameter

Click  to add additional sort parameters, using the **Sort Records By** and **Ascending/Descending** fields to filter your results.

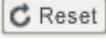
Saved Queries Tab

The Saved Queries tab lists existing queries that have been saved by the user or the administrator for a given Costpoint application.

Save All

You can make multiple revisions to different saved queries without having to save each change beforehand. Click  to retain all changes to the queries.

Reset

Click  to clear the fields of the current query criteria from the dialog box.

Count

Click  to display the number of results that Costpoint will return based on the query as you structured it. If the resulting number is too large, you can further refine your Query parameters to narrow your search. You can then click **Count** again to display the new number of records Costpoint will return based on your refined parameters. You will still need to run your query to see a display of the records that match the criteria selected.

GETTING STARTED WITH COSTPOINT**Save Query**

Click  to display the Save Query dialog box and assign a **Query ID** and **Query Name** of your present query and retain it for later use.

Reset

Click  to clear the fields of the current query criteria from the dialog box.

Find or Query

Click the **Find** or **Query** button to initiate the data search based on the parameters you entered. If the query returns more than one record, Costpoint displays the search results in a table. If the query returns just one record, that record displays in form-view format.

Close

Click **Close** to exit the Query dialog box.

LINKED CONTENT FILES

The Content Management System (CMS) Integration feature allows you to link content files located in a third-party management system to a Costpoint product suite record. For example, you can link a scanned PDF of a vendor invoice to the Costpoint accounts payable voucher record it was used to generate. You can also link other content, such as engineering drawings or video work instructions, to an assembly part or routing record in Costpoint.

Before you can use this feature, you must:

- On the Costpoint Web Configuration utility, define the connection between the product and a third-party CMS. For more information, see the *Deltek Costpoint 7.1.1 Configuration Utility* guide.
- On the Manage Content Types screen in System Administration, specify the types of electronic content (typically documents) that you want to link from a third-party CMS to a Costpoint data record.
- On the Manage Application/Content Links screen in System Administration, specify which types of content can be linked to a specific Costpoint application and result set.

To link a content file to an application result set, open that application and click  on the toolbar.  does not display in a particular application unless you set up the application for linking in the Manage Application/Content Links screen.

When you click , the Linked Content Files screen displays. Use this screen to create, maintain, view, or delete a link between a specific content file stored in a Content Management System (CMS) and a specific Costpoint database record.

Links created in one application/result set for the specific content type are visible in other applications if both applications have defined linking rules to the same content type.

For information about generating Costpoint report files and export files and saving them to the CMS, see Saving Files to the CMS.

Content Type

Enter, or click  to select, the ID of the content type to be linked to the Costpoint record.

Content Type Description

This non-editable field displays the content type description.

Content File Name

Enter, or click  to select, the name of the file to link to the Costpoint record. Use colons to separate the sections in the path (for example, CMS:Repository:Folder:Filename). After you save the record, only the content file name itself displays in this field.

Clicking  displays the CMS file names and their common properties including the CMS columns that you selected in the **Lookup Position** field on the Content Data Fields subtask of the Manage Content Types screen. Any queryable content data field can be used in the creation of a search condition.

Notes

Enter any notes related to the linked content file.

View

Click this button to view the selected file. You cannot view files over 10 megabytes in size.

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When you click this button, Internet Explorer downloads the file from the CMS. After the download is complete, Internet Explorer opens the appropriate file viewer.

Subtasks

Subtask	Description
Content Data Fields	Click this link to open the Content Data Fields subtask

[Table Information](#)

Changes to this screen update the following table:

CMI_CONT_FILE - CMS Integration Table

PRINT OPTIONS

There are numerous methods for printing reports. You can:

- Print to a printer attached to your network
- Print to a file
- Download the report as a file
- Print to a file and email it
- Archive your report for future viewing
- Print to a local printer

Click  to open the Print Options dialog box and select options for printing. This dialog box has four tabs:

- System printer - If you select the **System Printer** delivery option check box, use this tab to select the network printer you want to use and other options.
- File Options - If you select the **Print to File** or **Download** delivery option check boxes, use this tab to select the format of the file you want to create and other options.
- Email - If you select the **Email** delivery option check box, use this tab to enter the email information.
- Archive - If you selected the **Archive** delivery option check box, use this tab to save your report for later printing.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

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Delivery Options

Use this group box to select the delivery option for your report.

The **Print to File** and **Download** options have nearly the same function, but you cannot send your report to the process server if you select **Download**.

System Printer

Select this check box to send the report to a printer attached to your local network. If you select this check box, the System Printer tab is available. Use this tab to select which printer you want to use and other options. Use the Manage System Printers screen to set up printers for use in Costpoint.

This check box is not available unless the report category to which this report belongs has the **Allow System Printer** check box selected on the Manage Report Categories screen.

Print to File

Select this check box to print your report to a file. If you select this check box, you can use the File Options tab to select which file format you want to use and specify the location.

This check box is not available unless the report category to which this report belongs has the **Allow Print to File** check box selected on the Manage Report Categories screen.

Download

Select this check box to save your report to a file on your computer. If you select this check box, you can use the File Options tab to select which file format you want to use. When you click , a dialog box displays that you can use to select the location. If you select this check box, you cannot send this report to the process server.

This check box is not available unless the report category to which this report belongs has the **Allow Local Printer/Download** check box selected on the Manage Report Categories screen.

Email

Select this check box to email the report, which is included as a file attachment. Use the File Options tab to select the file format and the Email tab to enter the email information. If your email address is set up on the Workflow tab of the Manage Users screen, the email is sent from your email address. Otherwise, the email is sent from the workflow email address (for example, workflow@<company name>.com).

This check box is not available unless the report category to which this report belongs has the **Allow Email** check box selected on the Manage Report Categories screen.

Archive

Select this check box to archive your report. Use the Archive tab to enter ID information for your archive and specify how long you want it kept. To print an archived report, use the Print Archived Reports screen.

This check box is not available unless the report category to which this report belongs has the **Allow Archive** check box selected on the Manage Report Categories screen.

Local Printer

Select this check box to send your report to a local printer. A local printer is a printer that is attached directly to your computer. If you select this check box, the **Submit Batch Job** check box is not available. To find out how to set up a local printer, click [here](#).

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This check box is not available unless the report category to which this report belongs has the **Allow Local Printer/Download** check box selected on the Manage Report Categories screen.

Queueing**Submit Batch Job**

Select this check box to submit your report as a batch job to the process server. If you select the **Download** or **Local Printer** check boxes, this check box is unavailable.

Document Locale**Locale**

Use this drop-down list to select your report locale. The locale determines how report data is formatted in terms of language, numbers, and date/time preferences. Locales are set up by your company.

Pages**All**

Select this check box to print all the pages in the report. If you do not select this check box, you must enter the pages you want to print in the **Pages** field.

Pages

Enter the page number you want to print. Separate page numbers with commas, and indicate ranges with a dash. For example, enter **1, 4, 10-12** to print pages 1, 4, 10, 11, and 12.

Print Cover Page

Select this check box to print the report's cover page.

GENERATE RANDOM PASSWORD

This convenient Web-only function enables your system administrator to assign temporary passwords to single or multiple users. Costpoint generates temporary passwords based on the password complexity policy as defined in the Change Password function.

Costpoint electronically notifies users via email, which is sent to individual users only. Your system administrator does not know the password.

The randomly generated password assigned to each user is temporary. The user must change it after logging in.

Requirements for Random Password Generation

Prior to enabling Random Password Generation, you must do the following:

1. Set up the email server information in the Company Settings block of the Configure System Settings screen.
2. Enter the **Email Name** (address) for the end user in the Workflow tab of the Manage Users screen.
3. Set the **Authentication Method** for the user to either **Costpoint Database** or **Windows Domain & Costpoint Database** as defined in the Authentication tab of the Manage Users screen.

Generate a Random Password

To generate a random password for selected users, complete the following steps:

1. After meeting the requirements for random password generation (see list above), open the Manage Users screen and click **Query ▾** to identify any users who require a random password.
2. Click **Table** to view a list of employees.
3. Select the user(s) who require a random password. Click in the box before the user's name or use CTRL+Click to select multiple names.
4. Right-click anywhere on the screen and click **Generate Random Password** or click **Run Generate Random Password** on the toolbar.
5. When prompted to generate a new password for selected users, click **OK**.

If no users have been selected, Costpoint generates a new password for ALL queried users.

Costpoint generates random passwords and emails them to users. No one other than the individual user sees the password. Costpoint prompts the user to change the password at the next login.

Auto Generate Random Password

If edits or changes to the user's information are not required, use the Generate Random Password procedure described above. If, however, edits or changes are the main purpose of the session, you can generate a random password at the same time by selecting **Generate Random Password**, which automatically triggers password generation after you save the user information. This method is designed especially for creating new users.

To generate random passwords automatically for new or existing users, do one of the following:

- When creating a new user, select the **Generate Random Password** check box on the Authentication tab of the Manage Users screen. When you save the information for the new user, Costpoint sends an email containing the random password and clears the check box.
- When changing information for an existing user, you can also select **Generate Random Password** to generate a random password and send an email after you save the updated information. To prevent future (unwanted) generation of random passwords, Costpoint then automatically clears the check box.

GETTING STARTED WITH COSTPOINT

SEARCHING FOR AN APPLICATION

In addition to providing easy access to various applications through the **Browse Application** feature, Costpoint comes with a **Search** feature to help you quickly locate the application needed.

You can easily search for an application in the field beside the **Browse Applications** label. When you type a portion of either the application name or ID, Costpoint will automatically display the application names that match your entry.

In the example below, **Close P** has been entered and there are six items that match it. You can now simply select which of the matched terms is the application you require.



VIDEOS AND LEARNING AIDS

Costpoint Videos, Quick Reference Cards, Click-Thrus, DU Clickguides, and Menu Maps

Product Area	Type	Item
	Videos	<p>General Costpoint Usage</p> <ul style="list-style-type: none"> • Access Release Notes • Introducing the New Costpoint User Interface • Navigating Costpoint <p>Employee Self Service (ESS)</p> <ul style="list-style-type: none"> • Benefits Enrollment <p>Reports & Analytics</p> <ul style="list-style-type: none"> • Project Manager Dashboard <p>Contract Management</p> <ul style="list-style-type: none"> • Contract Management Overview
Costpoint	Costpoint Quick Reference Cards (QRC)	<p>General Usage:</p> <ul style="list-style-type: none"> • Query and Lookup QRC • Views QRC • Setting Up Printers QRC • Shortcut Keys Toolbar Icons and Buttons QRC
	Click-Thrus	<p>General Costpoint Usage</p> <ul style="list-style-type: none"> • User Interface Click-thru <p>Contract Management Click-thrus</p> <ul style="list-style-type: none"> • Contracts Overview Click-thru • Customer, Vendor, and Employee Overview Click-thru • Contract Management to GovWin IQ Integration Overview Click-thru • Opportunities Overview Click-thru • Org Conflict of Interest Overview Click-thru • Subcontracts Overview Click-Thru

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Product Area	Type	Item
Budgeting and Planning	Deltek University Clickguides	<p>Deltek University offers the following two clickguides to all users - DLZ and non-DLZ subscribers.</p> <p>To Access:</p> <ol style="list-style-type: none"> 1. Click DLZ Free Training. 2. Click Click Here beneath Costpoint New User Interface Training. 3. Select either of the following. <ul style="list-style-type: none"> • Costpoint New User Interface Menu Mapping Classic to New UI Clickguide • Contract Management Clickguide
	Menu Maps	<ul style="list-style-type: none"> • Costpoint 6.1 to Costpoint 7.1.1 Menu Mapping • Costpoint 7.1.1 to Costpoint 6.1 Menu Mapping
	Videos	<p>None right now. However, Deltek University provides access to a free B&P clickguide through the link below.</p> <p>DLZ Free Training</p> <p>If you are not a current subscriber to the DLZ, you can still view certain data as a generic user. Scroll to the bottom of the DLZ Welcome page and click the Click Here button to view free Costpoint and T&E Training.</p>
	Costpoint Quick Reference Cards (QRC)	<p>None right now.</p>
Financials	Click-Thrus	<p>None right now.</p>
	Deltek University Clickguides	<p>Deltek University offers the following clickguide to all users - DLZ and non-DLZ subscribers.</p> <p>To Access:</p> <ol style="list-style-type: none"> 1. Click DLZ Free Training. 2. Click Click Here beneath Costpoint New User Interface Training. 3. Select the following.

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Product Area	Type	Item
Time and Expense		<ul style="list-style-type: none"> • Budgeting & Planning by Resource Clickguide
	Menu Maps	<ul style="list-style-type: none"> • Budgeting and Planning 6.1 to Budgeting and Planning 7.0 Menu Mapping • Budgeting and Planning 7.0 to Budgeting and Planning 6.1 Menu Mapping
	Videos	<p>Time and Expense videos are available through the Deltek Learning Zone (DLZ).</p> <p>DLZ Free Training</p> <p>If you are not a current subscriber to the DLZ, you can still view certain data as a generic user. Scroll to the bottom of the DLZ Welcome page and click the Click Here button Beneath Time and Expense section to view free T&E Training.</p>
	Costpoint Quick Reference Cards (QRC)	None right now.
	Click-Thrus	None right now
	Deltek University Clickguides	None right now.
	Menu Maps	<ul style="list-style-type: none"> • Time and Expense 9.0.1 to Time and Expense 10.0 Menu Mapping • Time and Expense 10.0 to Time and Expense 9.0.1 Menu Mapping

SUPPORT OPTIONS

SUPPORT SERVICES

Deltek offers a variety of support services:

- **Deltek consulting:** Take advantage of our on-site consulting services to help with your implementation, data conversion, and other product-related needs.
- **Webinars:** Keep pace with the changing technology landscape by enlisting in [Deltek University](#) webinars that provide information on using Deltek products.
- **Telephone support:** Call us when you need detailed, specific answers to your question.
- **General assistance:** Benefit from our comprehensive guidance in designing, procuring, and installing your database software, operating systems, and hardware.
- **Turnkey network installations:** Avail of our expertise in matching your product to appropriate hardware and network architecture using pre-tested configurations and equipment.

Learn more about these additional Deltek services:

- [Customer Care](#)
- [Infrastructure Consulting Group](#)

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CUSTOMER CARE

Our trained support staff are available for ongoing phone support. If you require on-site or remote support, we are happy to schedule our next available general or technical consultant.

When to Call

We encourage you to call whenever you encounter a problem or a question that the product documentation cannot resolve. For maximum efficiency, we recommend appointing one person in your company, or in each department, to be your firm's local expert. All questions should be first addressed to your local expert. If your expert cannot resolve the problem, then he or she should contact us.

Select regular, extended, or emergency support, based on when you need to call.

Support Hours

The telephone number for Costpoint Customer Care is 877-457-7765 (877-HLP-PROJ).

Support lines are open during the following hours:

- Monday - Friday: 7:00 a.m. to 10:00 p.m. Eastern Standard Time
- Premium clients receive 24 hour per day support Monday - Friday
- Select clients receive 24 hour support seven days per week.

Holidays on which Deltek Customer Support offices are closed are as follows:

- New Year's Day
- Memorial Day
- Independence Day (July 4)
- Labor Day
- Thanksgiving
- Christmas Day

Returning your call: Information on Deltek's call tracking system

In handling support calls, Deltek strives to minimize your waiting time. Instead of requiring you to wait on the line until support personnel become available, Deltek's team of Support Receptionists log you in to our call-tracking system. You do not need to explain your problem to the Support Receptionists (they do not have the skills necessary to resolve your issue). You can call at **877.457.7765 (877.HLP.PROJ)**. The Support Receptionist will ask you for the following information:

- Your Contact ID (or Client ID)
- Your name and phone number
- The product you are calling about
- Whether your call is general or technical in nature
- A brief description of your problem

When you call, we log you in to our online call-tracking system, where your call is immediately visible to our support staff. We prioritize calls in the order received and track our response times. With the exception of calls flagged as Urgent, which we move to the top of the queue, we strive to contact all callers in one hour or less.

In some cases, you may already be working with someone on an issue and can only follow up with that person. Please ask for that person by name. You should be aware, however, that since your consultant may not be immediately available, your call might not be returned as quickly.

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Once you place your call to Deltek, inform your receptionist that you are expecting a call from us. If you are not available when we call back, we will leave a message or voice mail to inform you that we returned your call. Your call remains in the call-tracking queue but moves to the end, as though you had just placed the call. Our return call process begins again, and our call tracking system records each attempt we make to reach you.

Who to Call

We offer three types of customer support. Please specify the type you need when you leave your message. The support types are:

- **General Support** - Most questions fall into this category. These include all Costpoint setup and operation questions and other issues that do not fit into any of the categories listed below. The support representatives handling these inquiries are experienced, management-level accountants. You can also provide your Support Receptionist with a one- or two-word description that might help direct your call, for example: "Pools/Urgent," or "A/P Reconciliation."
- **Technical Support** - You should request this type of support if you received an error message or are having difficulty installing a software update. If technical problems arise in the Materials Management area, you should ask your Support Receptionist to place your case in the Technical Support queue. If you are unsure which type of support you need, ask for General Support.
- **Costpoint Materials Management** - Questions relating to the Costpoint Materials Management folder (which includes the Product Definition, Bills of Material, Routings, Engineering Change Notices, Procurement Planning, Purchasing, Receiving, Inventory, Production Control, Sales Order Entry, Material Requirements Planning, Materials Estimating, and Master Production Scheduling modules) should be identified as "Materials Management General."

Deltek Web Site

Via the [Deltek Customer Care Connect Web site](#), you can do the following:

- Download the latest versions of your Deltek products
- Search the Deltek knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Access information on enhancement error corrections and other technical issues
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes

You can also submit comments, error reports, and non-urgent support questions. Because Internet communication and response times can vary, you should not use the Customer Care Connect Web site for urgent support questions; please call our telephone support number instead.

To access the client support programs and information on our Web site, you must first register to receive the login and password for this area. You can register through Online Client Registration on our main Web page. You need to submit the following information for your company:

- Deltek support ID
- Contact information, including business address and, most importantly, email address
- Software/platform information

INFRASTRUCTURE CONSULTING GROUP

The Infrastructure Consulting group provides a broad range of services to assist in initial setups and also in maximizing the potential of this architecture over time.

General Services

- Multiple environment deployment and configuration
- Remote user configuration
- Technical planning and reviews
- Hardware requirements analysis and selection
- Deployment planning and testing
- Client configuration and management
- Customized security setup and administration

Networks & Connectivity

- File and network operating system selection, optimization, and management
- Server-specific optimization
- Connectivity issue identification and resolution

Relational Databases

- Database selection, tuning, and optimization
- Multiple database implementation and management

Systems Integration Packages

The Deltek Infrastructure Consulting group offers standard turnkey configurations with turnkey installation, configuration, and support options. We encourage you to take advantage of our expertise in matching Costpoint to appropriate hardware and network configuration.

Deltek systems integrators are highly trained experts. In addition to recommending complete client/server configurations that best match your needs and resources, our consultants can:

- Improve the performance of your existing computing infrastructure, or
- Supply expert input for your own design and implementation planning.

Single-sourcing with Deltek means the convenience of making just one call for support, no matter what type of system help you require.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com