Deltek Costpoint 7.1.1 User Interface Quick Reference Card

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Messages
Click this button to view any messages and errors related to the application.

Menu Options
The menu options allow you to perform basic functions within the Costpoint application. Click each of these options to access additional functions. For example, click the **Process** menu to access the **Action Menu**, **Default Action**, **View Action and Report Status**, **File Upload**, and **File Download** functions.

Screen Configuration — Click this button to configure **User Preferences**. See side two for additional information.

Navigation
Use the **My Menu**, **Open Applications** and **Browse Applications** buttons and menu paths to open and navigate through Costpoint's domains, modules, and applications.

My Menu — Click this button to view the applications you are configured to use.

Open Applications — Click this button to view a list of the applications that are currently active or open.

Browse Applications — Click this button to display the Navigation list, which lists the Costpoint domains: **Accounting**, **Projects**, **People**, **Materials**, and **Administration**.

There are two ways to open an application:

- Type the application name or ID in the field to the right of the **Browse Applications** button. Costpoint will then display the application name (ID) that matches your entry. Click the application that you want. Or...

- Click the Domain icon that you want to access. A domain's associated modules then display in a panel immediately to the right of the domain list. When you select a module, additional panels display with application groups and related applications available for use. Your path is highlighted in blue. You can also navigate through the menu by selecting a different item from the previous panel's list.
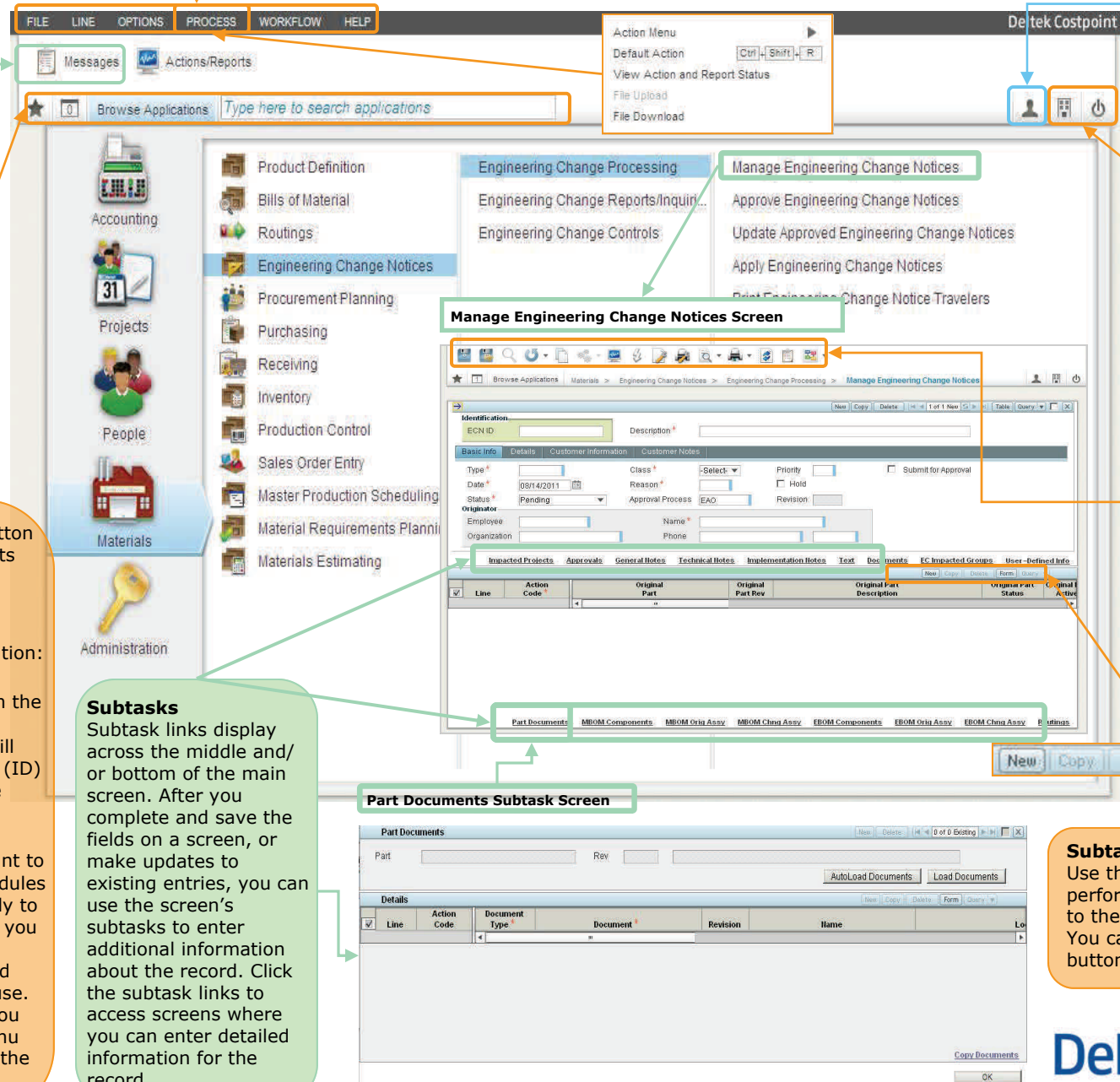
Select Company — Click this button to select the active company.

Sign Out — Click this button to sign out of Costpoint.

Global Icons
Use the global icons to maneuver around Costpoint applications. They are located on the Costpoint Global toolbar and can be accessed at any time but may depend on the available functions for the current screen.

Manage Engineering Change Notices Screen

Subtasks
Subtask links display across the middle and/or bottom of the main screen. After you complete and save the fields on a screen, or make updates to existing entries, you can use the screen's subtasks to enter additional information about the record. Click the subtask links to access screens where you can enter detailed information for the record.

Part Documents Subtask Screen

Subtask Toolbar
Use the subtask toolbar to perform functions specific to the selected subtask. You can scroll over each button for a tool tip.

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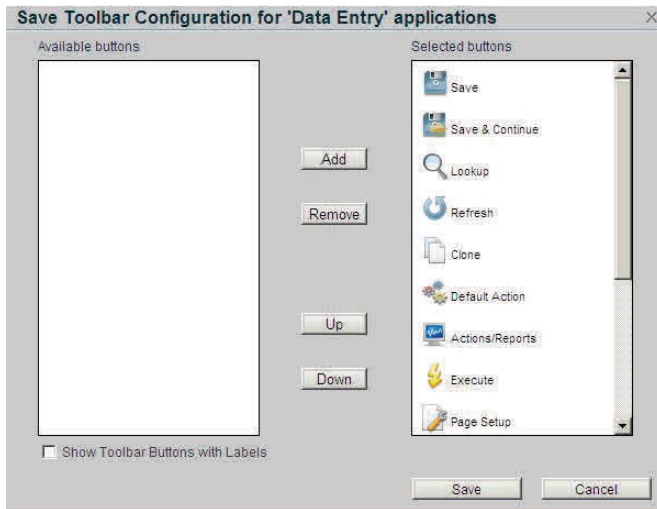
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User Preferences

Click the **Screen Configuration** button on the main Costpoint screen. The Configure dialog box displays for the current role. This dialog box lists the selected company, database, and validation settings.

Use this dialog box to access the following:

Top-level Toolbar — Click **Modify** to set which top-level toolbar items are available for the currently selected application type.

Current Application Layout — Click **Save** to lock the application and save the current layout's position and sizing for use in a later session.

My Menu — Click **Manage** to add or modify your **My Menu** list. This list is a custom menu that provides quick access to your applications.

CPSUPERUSER

Company:	Company 1
System:	C70RQM
Validation Frequency	Field

Configure CPSUPERUSER

Top-level Toolbar   Modify or Reset
 Data Entry

Current Application Layout   Save
 Manage Engineering Change Notices

My Menu   Manage

Administer Profile

--Select Profile ▼

Enter Profile

Configure User Preferences

Use the group boxes on the **Configure User Preferences** screen to configure the defaults for your user preferences, applications, and menus in Costpoint. Selections made on this screen determine the information that displays when you use Costpoint.

Identification — Your user identification and user name display in the Identification block of the screen. These are defined by your system administrator.

User Information — Use the fields in this group box to enter your default company, password, report, and phone information.

Change Default Period — Select this subtask to access the Change Default Period subtask.

UI Profiles — Select this subtask to access the user profiles for this application.

Identification

User ID	CPSUPERUSER	User Name *	CostPoint Super User

User Information

Default Information
Reporting Company * SuperTech, Inc.
Login Company * Company 1

Password Information
Old Password
New Password
Verification

Default Report Delivery Options
☐ System Printer
☐ Print to File
☑ Download
☐ Email
☐ Archive
☐ Local Printer

Phone
Phone 703-123-4567
Extension 5678
☑ Notify When Batch Job Is Completed

Change Default Period   UI Profiles

My Menu Application List Query ▼

☑	Application	Nan...
	AOMADP25	Manage ADP 2.5 Mapping Val...
	AOMAIELM	Manage Interface Elements
	AOMAIEVM	Manage Element Value Mappi...
	AOMAIICS	Manage Interface Configurati...
	AOMCBBET	Manage Cobra Budget Eleme...
	AOMCBCHG	Manage Cobra Charge Templ...
	AOMCBCST	Manage Cobra Cost Template...
	AOMCBEXT	Manage Cobra Extraction Para...
	AOMCBPRJ	Manage Cobra Program Mapp...

Select

My Menu New Copy Delete Query ▼

☑	Sequence	Line Type *	My Menu Title *	
	1	Application ▼	Interface Configuration and Scheduler	AOMA...
	2	Application ▼	Employee Leave	LDME...
	3	Application ▼	Enter/Manage Fringe Ceilings by Local	LDMF...
	5	Group Header ▼	GGG	
	6	Application ▼	ADP 2.5 Mappings	AOMA...
	11	Application ▼	Mass Add PrOJeCt Master Data	PJPM...
	16	Application ▼	Enter/Manage Cobra Budget Element Temp	AOMC...
	21	Application ▼	Print Workflow Definition Report	WFRD...

Default My Menu

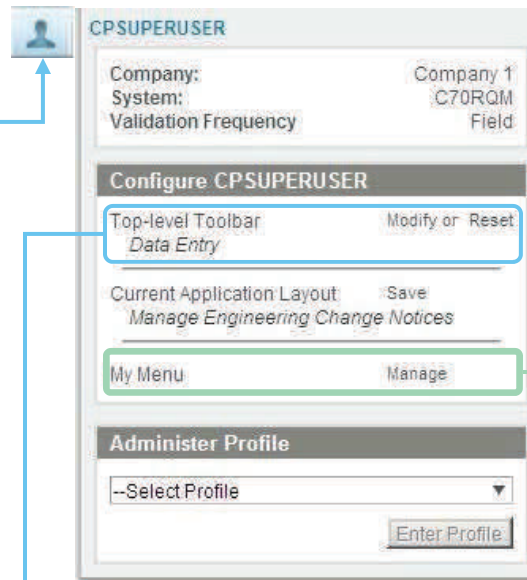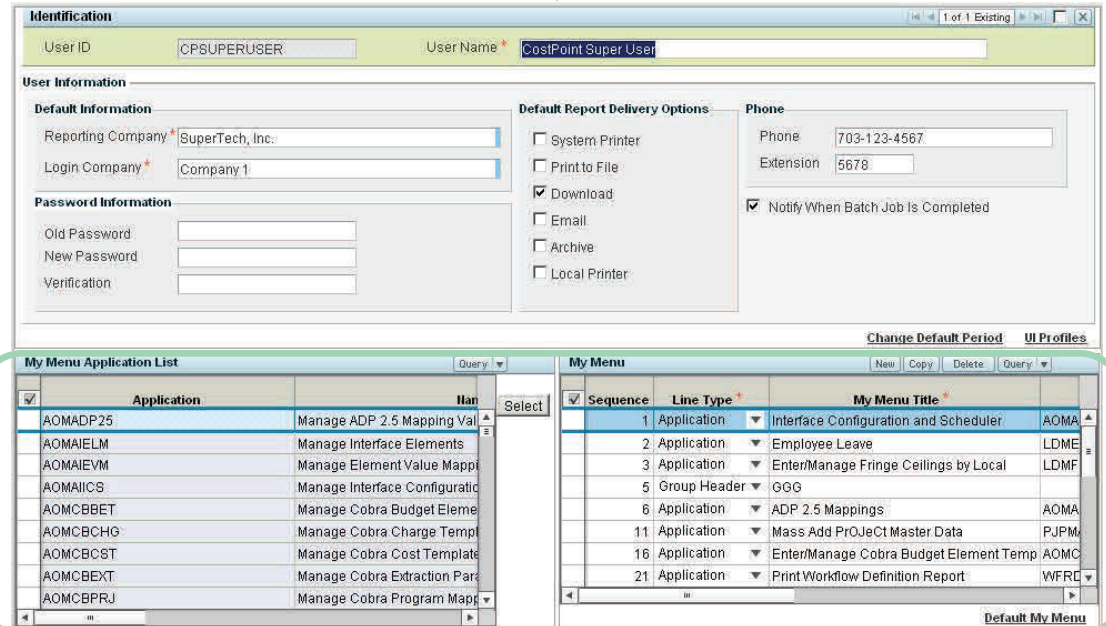### Save Toolbar Configuration for 'Data Entry' applications

Available buttons

Selected buttons
- Save
- Save & Continue
- Lookup
- Refresh
- Clone
- Default Action
- Actions/Reports
- Execute
- Page Setup

Add
Remove
Up
Down

☐ Show Toolbar Buttons with Labels

Save   Cancel

Save Toolbar Configuration

Use the **Save Toolbar Configuration** dialog box to configure the default toolbar settings. Select the buttons from the **Available buttons** list and click **Add** to add them to the **Selected buttons** list. Click **Up** and **Down** to set the order of the display. Click **Save** to save your changes. These buttons display on the toolbar for the current application.

My Menu Table Windows

Use these table windows to select the applications that you want to include in your Costpoint application. The My Menu Application List displays the applications your role can access, and My Menu displays your frequently used applications. You can customize the My Menu list to include your favorite applications and minimize time spent navigating through the entire Costpoint menu.

To make a selection on the My Menu Application List, highlight the application on this list of all Costpoint applications and click **Select**. The My Menu fields display information for each application and their location within Costpoint. Select these options to configure the order and type of menus that display in your application. Click **Default My Menu** to open the default menu subtask.

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