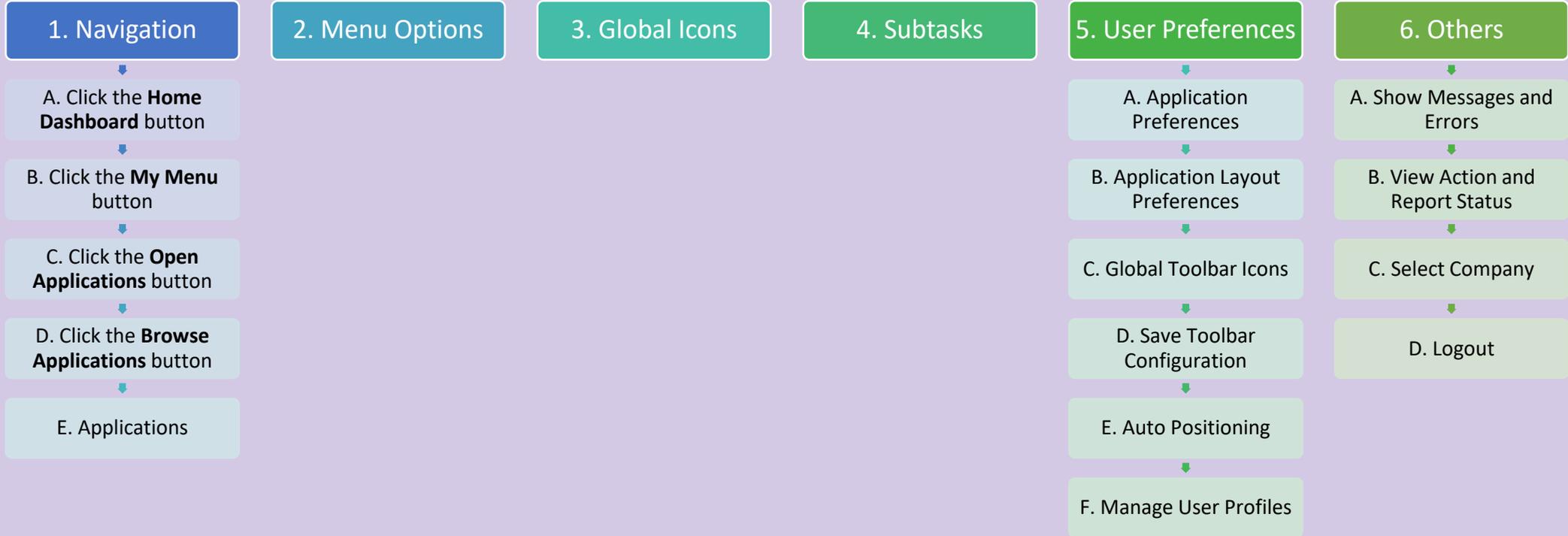


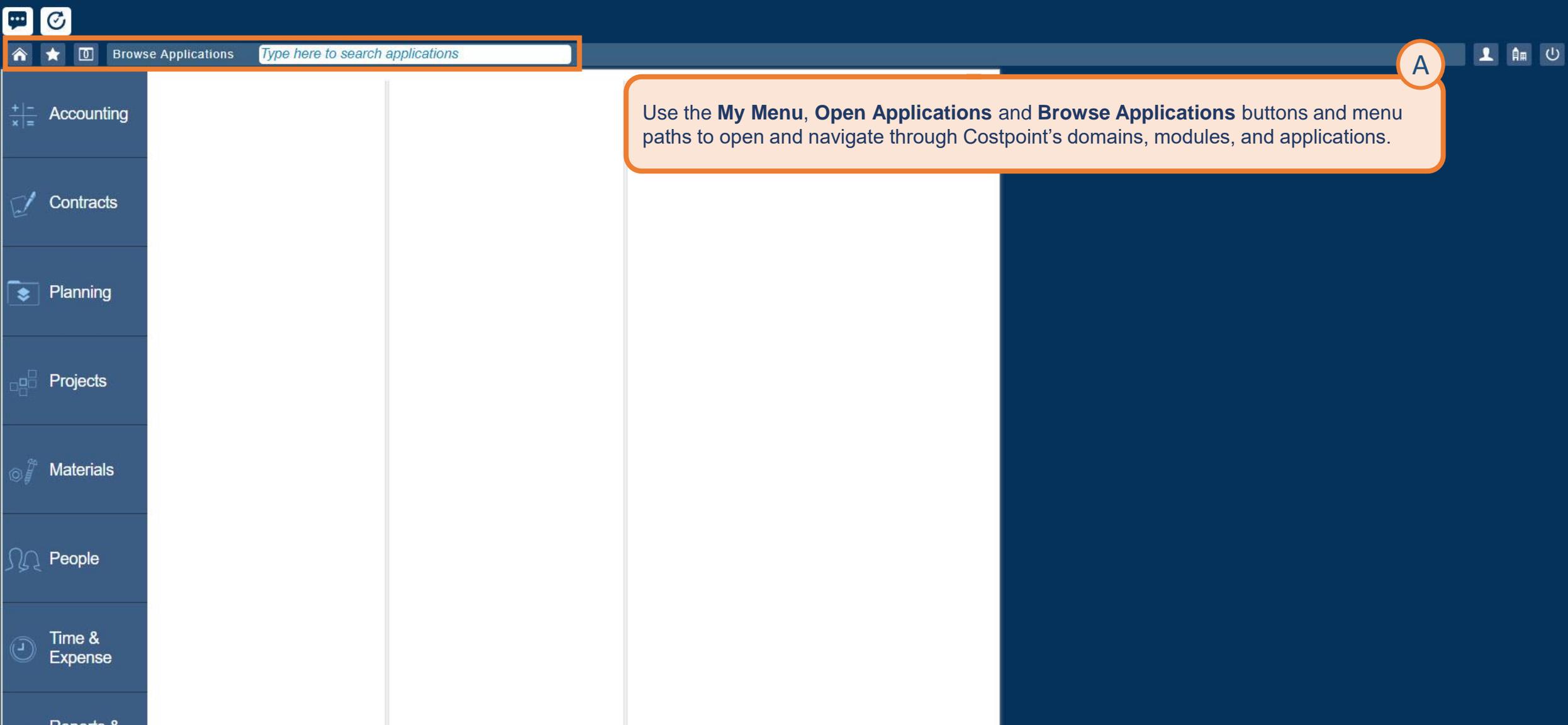
# Costpoint User Interface Quick Steps

The high-level steps to view the Costpoint User Interface are shown here. Some steps include sub-steps.

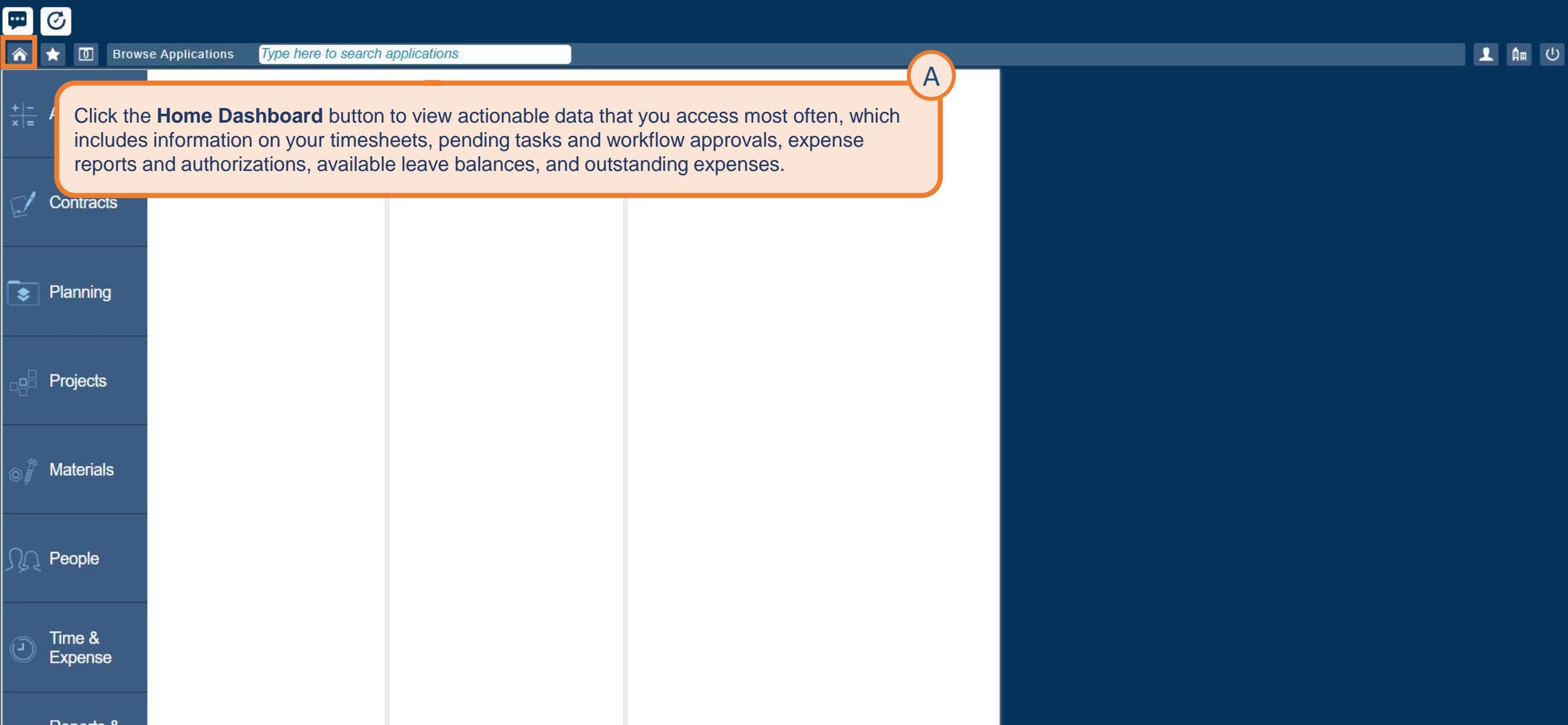


## Navigation:

- Use the PAGE DOWN key to proceed through the quick steps.
- Use the PAGE UP key to return to a prior slide.



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



Click the **Home Dashboard** button to view actionable data that you access most often, which includes information on your timesheets, pending tasks and workflow approvals, expense reports and authorizations, available leave balances, and outstanding expenses.

1. Navigation: A. Click the Home Dashboard button.

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

Contracts

Planning

Projects

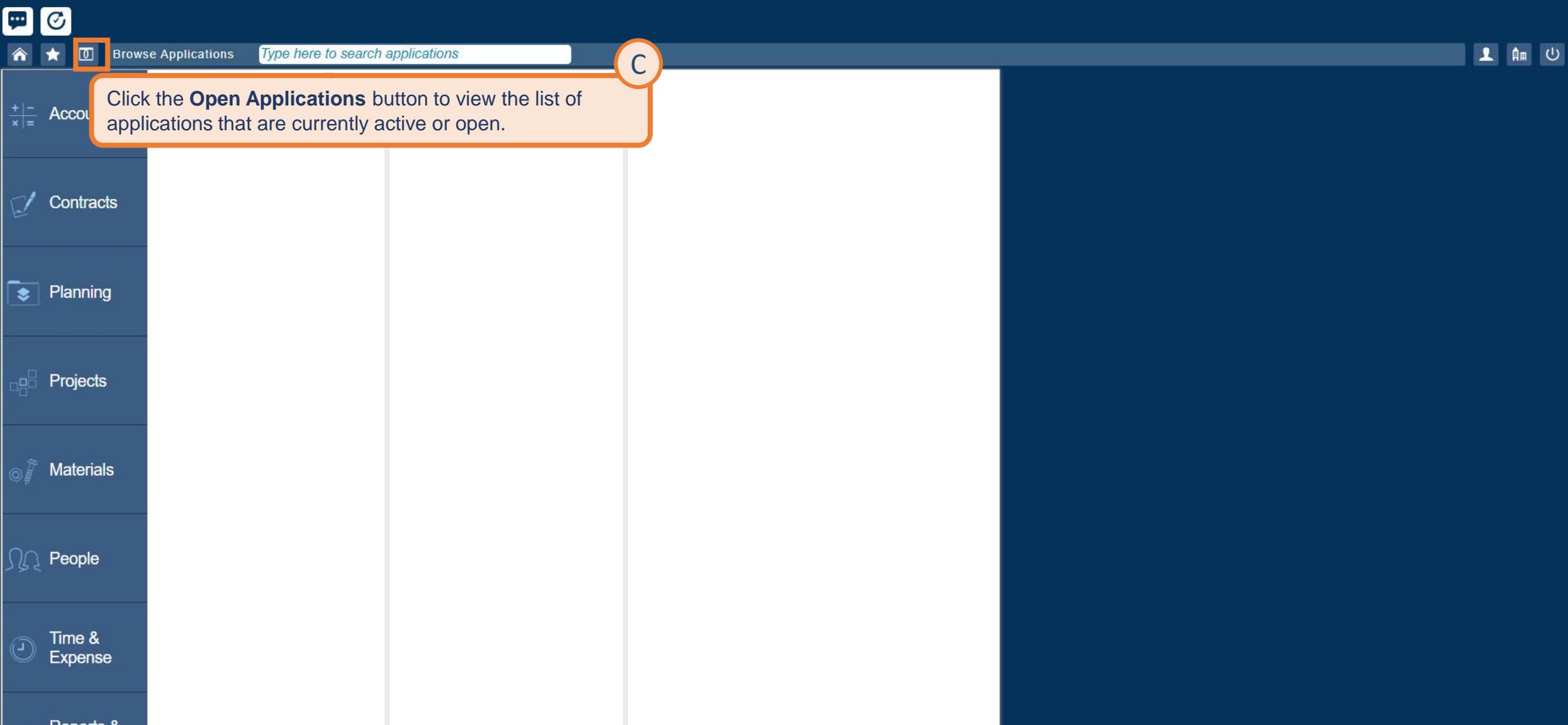
Materials

People

Time & Expense

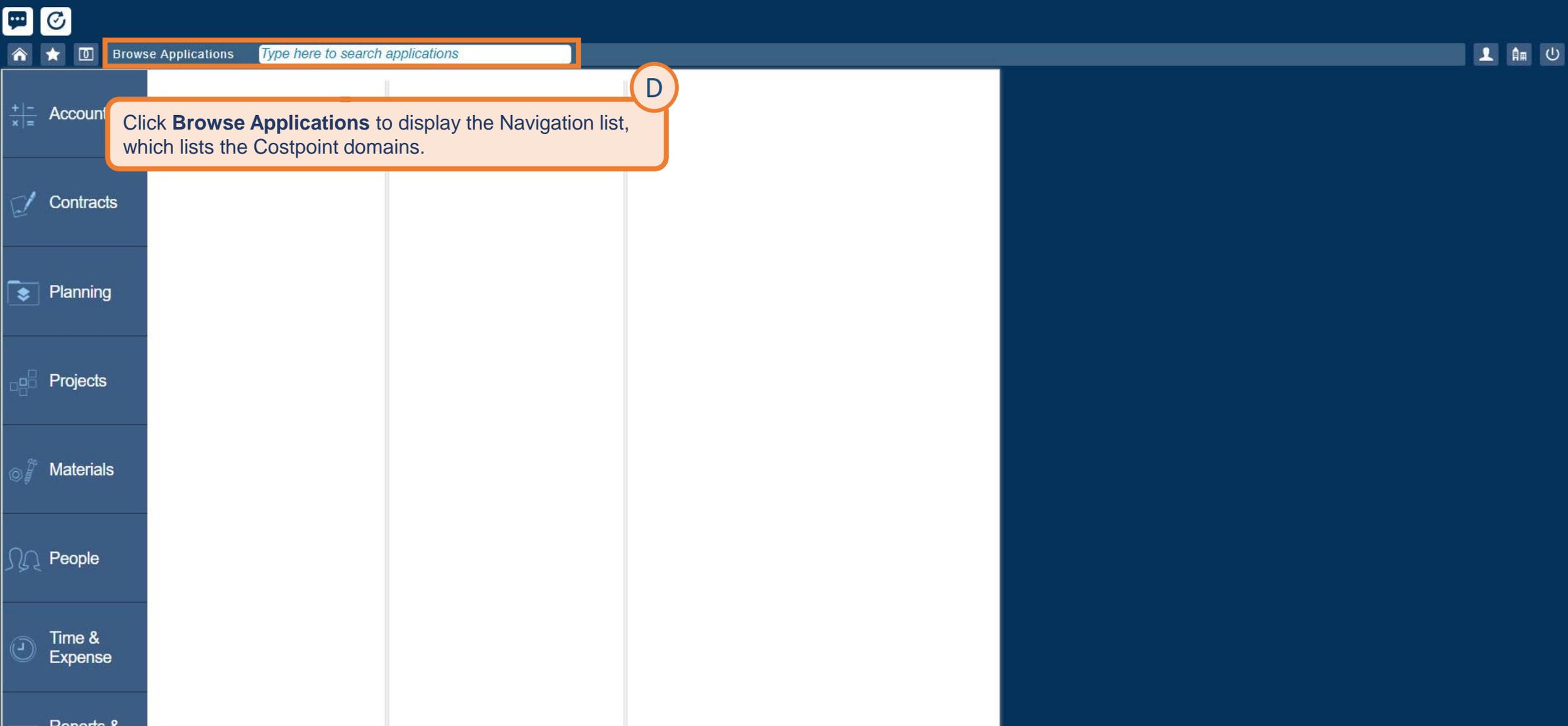
Reports &

1. Navigation: B. Click the My Menu button.



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

1. Navigation: C. Click the Open Applications button.



D

Click **Browse Applications** to display the Navigation list, which lists the Costpoint domains.

1. Navigation: D. Click the Browse Applications button.



★ Browse Applications

Manage Engineering Change

- Manage Engineering Change Notices (ECMECN)
- Manage Engineering Change Reasons (ECMRSN)
- Manage Engineering Change Priorities (ECMPRI)
- Manage Engineering Change Rejection Reason Codes (ECMREJR)
- Manage Engineering Change Types (ECMTYPE)
- Manage Engineering Change Approval Titles (ECMECAPT)
- Manage Engineering Change Project Approvers (ECMPRAPP)
- Manage Engineering Change Approval Processes (ECMECAPP)

E

There are two ways to open an application.

First, is to enter the application name or ID in the field to the right of the **Browse Applications** button.

For example, if you want to open the Manage Engineering Change Notices, just type **Manage Engineering Change Notices** or its application ID, **ECMECN**, in the field .

Costpoint will then display the application name (with ID) that matches your entry. Click the application that you want to open.

Browse Applications 

Accounting	Product Definition	Engineering Change Processing	Manage Engineering Change Notices
	Bills of Material	ECN Reports/Inquiries	Approve Engineering Change Notices
	Routings	ECN Utilities	Update Approved Engineering Change Notices
Projects	Engineering Change Notices	Engineering Change Controls	Apply Engineering Change Notices
	Procurement Planning		Print Engineering Change Notice Travelers
	Purchasing		
	Receiving		
Materials	Inventory		
	Production		
	Sales		
People	Master		
	Material		
	Material		
Reports & Analytics			
Admin			

E

Second, click the Domain that you want to access. The 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.

Action Menu  
 Default Action Ctrl+Shift+R  
 View Action and Report Status  
 File Upload  
 File Download

2

Click the menu **options** to access additional functions.

Identification  
 ECN ID  Description

**Basic Info** | Details | Customer Information | Customer Notes

Type  Class  Priority   Submit for Approval  
 Date  Reason   Hold  
 Status  Approval Process  Revision

**Originator**  
 Employee  Name   
 Organization  Phone

[Impacted Projects](#) | [Approvals](#) | [General Notes](#) | [Technical Notes](#) | [Implementation Notes](#) | [Text](#) | [Documents](#) | [EC Impacted Groups](#) | [User-Defined Info](#)

**Menu Options**

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

**Note:** The available functions depend on the application being displayed.

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

[Part Documents](#) | [MBOM Components](#) | [MBOM Orig Assy](#) | [MBOM Chng Assy](#) | [EBOM Components](#) | [EBOM Orig Assy](#) | [EBOM Chng Assy](#) | [Routings](#)



3

Use the **global icons** to maneuver around Costpoint applications.

Identification  
ECN ID  Desc

**Basic Info** Details Customer Information Customer Notes

Type\*  Class\* -Select- Priority   Submit for Approval  
Date\* 06/03/2020 Reason\*   Hold  
Status\* Pending Approval Process  Revision

Originator  
Employee  Name\*   
Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

Line	Action Code*	Original Part	Original Part Rev	Original Part Description	Original Part Status	Orig

[Part Documents](#) [MBOM Components](#) [MBOM Orig Assy](#) [MBOM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)

### Global Icons

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.



Identification  
 ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  Priority   Submit for Approval  
 Date\*  Reason\*   Hold  
 Status\*  Approval Process  Revision

Originator  
 Employee  Name\*   
 Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

Line	Action Code*	Original Part	Original Part Rev	Original Part Description	Original Part Status
1					

[Part Documents](#) [MBOM Components](#) [MBOM Orig Assy](#) [MBOM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)

## 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.



Identification  
ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  Priority   Submit for Approval  
Date\*  Reason\*   Hold  
Status\*  Approval Process  Revision

Originator  
Employee  Name\*   
Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

Line	Action Code*	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

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



5

Click the **User Preferences** button to see information such as the company name, database, and validation settings.

Identification  
ECN ID [ ] Description \* [ ]

Basic Info | Details | Customer Information | Customer Notes

Type \* [ ] Class \* [-Select-] Priority [ ]  Submit for Approval  
Date \* 06/03/2020 Reason \* [ ]  Hold  
Status \* Pending Approval Process [ ] Revision [ ]

Originator  
Employee [ ] Name \* [ ]  
Organization [ ] Phone [ ] [ ]

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

[Part Documents](#) [MBOM Components](#) [MBOM Orig Assy](#) [MBOM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)

**CPSUPERUSER**

Company Name: **Company 1**  
System: **C80MQCM17PB**  
Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes [Save](#) | [Reset](#)  
Global Toolbar Icon Options [Edit](#) | [Reset](#)

**Auto Positioning On**   
Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

Close all applications to enter User Profiles.

[View Applications](#) [Close Applications](#) [Cancel](#)

Manage "My Menu" in "Configure User Preferences"



Identification  
 ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  -Select-  
 Date\* 06/03/2020 Reason\*   
 Status\* Pending Approval Process

Originator  
 Employee  Name\*   
 Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

A

## Application Preferences

In this area, you can edit settings for the currently opened application. For example, set the toolbars to display for the Manage Engineering Change Notices screen in the **Global Toolbar Icon Options**.

CPSUPERUSER

Company Name: **Company 1**  
 System: **C80MQCM17PB**  
 Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes [Save](#) | [Reset](#)  
 Global Toolbar Icon Options [Edit](#) | [Reset](#)

**Auto Positioning On**   
 Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**  
 ⚠ Close all applications to enter User Profiles.

[View Applications](#) [Close Applications](#) [Cancel](#)

Manage "My Menu" in "Configure User Preferences"

Line	Action Code*	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

[Part Documents](#) [MBOM Components](#) [MBOM Orig Assy](#) [MBOM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)



New Copy Delete 1 of 1 New Table Query

Identification  
 ECN ID  Description \*

Basic Info Details Customer Information Customer Notes

Type \*  Class \*  Priority   Submit for Approval  
 Date \* 06/03/2020 Reason \*   Hold  
 Status \* Pending Approval Process   
 Originator  
 Employee  Name \*   
 Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Tech](#)

B

Click **Save** on the **Application Layout Changes** area if you want to retain the current layout of the application that is open.

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 the application.

New Copy Delete Form Query

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

**CPSUPERUSER**

Company Name: **Company 1**  
 System: **C80MQCM17PB**  
 Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes [Save](#) [Reset](#)  
 Global Toolbar Icon Options [Edit](#) [Reset](#)

**Auto Positioning On**

Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

⚠ Close all applications to enter User Profiles.

[View Applications](#) [Close Applications](#) [Cancel](#)

Manage "My Menu" in "Configure User Preferences"



New Copy Delete 1 of 1 New Table Query

**Identification**  
 ECN ID  Description \*

**Basic Info** | Details | Customer Information | Customer Notes

Type \*  Class \*  -Select-  
 Date \* 06/03/2020  Reason \*   
 Status \* Pending  Approval Process  Revision

**Originator**  
 Employee  Name \*   
 Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

C

Click **Save** on the **Application Layout Changes** area if you want to retain the current layout of the application that is open. Click **Edit** on the **Global Toolbar Icon Options** area to open the **Save Toolbar Configuration** dialog box.

New Copy Delete Form Query

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

**CPSUPERUSER**

Company Name: **Company 1**  
 System: **C80MQCM17PB**  
 Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes	Save   Reset
Global Toolbar Icon Options	Edit   Reset

**Auto Positioning On**   
 Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

 Close all applications to enter User Profiles.

Manage "My Menu" in "Configure User Preferences"



Browse Applications > Materials > Engineering Cha

D

Use the **Save Toolbar Configuration** dialog box to configure the default toolbar settings.

### Save Toolbar Configuration

 Show Toolbar Buttons with Labels

 Apply Configuration for Current Application Only.

**Available (1)**

Add All

Name	Add
Export to Excel	+

**Selected (14)**

Remove All

Name	Order	Remove
Save	↓	×
Save & Continue	↑ ↓	×
Refresh	↑ ↓	×
Clone	↑ ↓	×
Lookup	↑ ↓	×
Default Action	↑ ↓	×
Actions/Reports	↑ ↓	×
Execute	↑ ↓	×
Page Setup	↑ ↓	×
Print Options	↑ ↓	×
Preview	↑ ↓	×

Save

Close

Select the buttons from the **Available** buttons list and click **Add** to move 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.

Part Documents MBOM Components



Identification  
ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  Priority   
Date\* 06/04/2020 Reason\*   Hold  
Status\* Pending Approval Process  Revision

Originator  
Employee  Name\*   
Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

E

The Auto Positioning feature, which automatically resizes screens based on the available space, is always turned on in the new user interface.

**CPSUPERUSER**

Company Name: **Company 1**  
System: **C80MQCM17PB**  
Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes [Save](#) | [Reset](#)  
Global Toolbar Icon Options [Edit](#) | [Reset](#)

**Auto Positioning On**

Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

 Close all applications to enter User Profiles.

[View Applications](#) [Close Applications](#) [Cancel](#)

Manage "My Menu" in "Configure User Preferences"



Identification  
 ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  Priority

Date\* 06/04/2020 Reason\*   Hold

Status\* Pending Approval Process  Revision

Originator  
 Employee  Name\*

Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

F

Use the **Manage User Profiles** area to customize user profiles.

**CPSUPERUSER**

Company Name: **Company 1**  
 System: **C80MQCM17PB**  
 Validation Frequency: **Field**

**Application Preferences**

**Manage Engineering Change Notices**

Application Layout Changes [Save](#) | [Reset](#)  
 Global Toolbar Icon Options [Edit](#) | [Reset](#)

**Auto Positioning On**

Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

⚠ Close all applications to enter User Profiles.

[View Applications](#) [Close Applications](#) [Cancel](#)

Manage "My Menu" in "Configure User Preferences"

You can only manage user profiles if all applications are closed. Click the **Close Applications** button to do this.

A User profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities.



Browse Applications



F

Once all applications are closed, select a user profile to customize.

**CPSUPERUSER**

Company Name: **Company 1**  
System: **C80MQCM17PB**  
Validation Frequency: **Field**

**Application Preferences**

All applications are closed.

Application Layout Changes	Save   Reset
Global Toolbar Icon Options	Edit   Reset

**Auto Positioning On**

Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

- Select Profile
- Select Profile
- Timesheet Employee
- Manager Approval Timesheet Exp Rept
- Default Timesheet Profile
- Expense Report End User Default
- AP Group
- Subcontractor Expense
- Program Manager
- Finance Group
- Changes for everyone
- TE End User Default



5

Open the application that you want to customize and modify the screen.

When a user profile is selected and activated, the User Preferences icon changes color to indicate that you are in the User Profile mode.



Identification  
ECN ID  Description\*

Basic Info Details Customer Information Customer Notes

Type\*  Class\*  Priority   
Date\* 06/04/2020 Reason\*   Hold  
Status\* Pending Approval Process  Revision

Originator  
Employee  Name\*   
Organization  Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#)

5

Click the **User Preferences** icon. And then, click **Save** beside the **Application Layout Changes** area to save your customization.

Click **Close Applications** to exit the user profile.

Line	Action Code*	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part
1						

[Part Documents](#) [MROM Components](#) [MROM Orig Assy](#) [MROM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)

CPSUPERUSER

Company Name: **Company 1**  
System: **C80MQCM17PB**  
Validation Frequency: **Field**

Application Preferences

**Manage Engineering Change Notices**

Application Layout Changes	Save	Reset
Global Toolbar Icon Options	Edit	Reset
Mobile Configuration	Edit	Reset

Auto Positioning On   
Auto Positioning resizes applications to fully utilize screen space.

Current User Profile Close all applications to exit User Profile

Basic Screens

Manage "Profile My Menu" in "Manage User Interface Profiles"



Browse Applications



5

Click the **Configure User Preferences** link on the User Preferences screen to manage **My Menu**.

My Menu is the star icon on the left-hand side of the screen. It provides a convenient access to your favorite applications.

**CPSUPERUSER**

Company Name: **Company 1**  
System: **C80MQCM17PB**  
Validation Frequency: **Field**

**Application Preferences**

All applications are closed.

Application Layout Changes	Save	Reset
Global Toolbar Icon Options	Edit	Reset

**Auto Positioning On**

Auto Positioning resizes applications to fully utilize screen space.

**Manage User Profiles**

--Select Profile

Manage Profile Cancel

Manage "My Menu" in "Configure User Preferences"

Browse Applications > Admin > System Administration > System Administration Controls > Configure User Preferences

Identification 1 of 1 Existing

User ID: CPSUP... User Name\*: Asaka C.P.A., Leslie k

**User Information**

**Default Information**

Reporting Company: SuperTech  
 Default Company\*: Company  
 Default Application:  
 Application Name:

**Password Information**

Old Password: PIN: Delegate Approvals: User ID:  
 New Password:  
 Verification:

Locale ID: en\_US English (United States)

Enable AutoComplete  
 Notify When Batch Job Is Completed

5 On the Configure User Preferences screen, use the table windows to select the applications that you want to include in **My Menu**.

The **My Menu Application List** displays the applications that 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.

Change Default Period UI Profiles Message Board Subscriptions FIDO Biometric Devices

**My Menu Application List** Query **My Menu** New Copy Delete Query

Application	Name	Domain	Module	Module Name	Select	Sequence	Line Type*	My Menu Title*	Application	Application Name	
<input checked="" type="checkbox"/>	AOMADP25	Manage ADP 2.5 Mapping Values	People	LD	Labor		5	Application	Manage ADP 2.5 Mapping Values	AOMADP25	Manage ADP 2.5 Mapping Values
	AOMADPMP	Manage ADP Mapping Values	People	LD	Labor		10	Application	Manage ADP Mapping Values	AOMADPMP	Manage ADP Mapping Values
	AOMAIELM	Manage Interface Elements	Admin	SY	System Administration		15	Application	Manage Interface Elements	AOMAIELM	Manage Interface Elements
	AOMAIEVM	Manage Element Value Mappings	Admin	SY	System Administration		20	Group Header	Grayce Applications		
	AOMAIICS	Manage Interface Configuration and Sched	Admin	SY	System Administration		21	Application	Import Manufacturing Order Status Updates	AOPCPIMO	Import Manufacturing Order Status Upda
	AOMCBET	Manage Cobra Resource Templates	Admin	SY	System Administration		22	Application	Manage End Item Configurations	BMMEICN	Manage End Item Configurations

Default My Menu

Browse Applications > Admin > System Administration > System Administration Controls > Configure User Preferences

**Identification** 1 of 1 Existing

User ID: CPSUPERUSER      User Name\*: Asaka C.P.A., Leslie k

**User Information**

**Default Information**

Reporting Company: SuperTech, Inc. Tes  
 Default Company\*: Company 1  
 Default Application:  
 Application Name:

**Default Report Delivery Options**

Locale ID: en\_US      English (United States)

**Password Information**

Old Password:      PIN:      User ID:       Enable AutoComplete

New Password:  
 Verification:

Auto Positioning\*: Yes

5 To make a selection on the My Menu Application List, highlight the application 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. Click **Save**.

Change Default Period    UI Profiles    Message Board Subscriptions    FIDO Biometric Devices

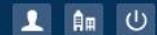
**My Menu Application List**    Query    **My Menu**    New    Copy    Delete    Query

Application	Name	Domain	Module	Module Name	Select	Sequence	Line Type*	My Menu Title*	Application	Application Name
<input checked="" type="checkbox"/>	AOMADP25	Manage ADP 2.5 Mapping Values	People	LD	Labor	5	Application	Manage ADP 2.5 Mapping Values	AOMADP25	Manage ADP 2.5 Mapping Values
<input type="checkbox"/>	AOMADPMP	Manage ADP Mapping Values	People	LD	Labor	10	Application	Manage ADP Mapping Values	AOMADPMP	Manage ADP Mapping Values
<input type="checkbox"/>	AOMAIELM	Manage Interface Elements	Admin	SY	System Administration	15	Application	Manage Interface Elements	AOMAIELM	Manage Interface Elements
<input type="checkbox"/>	AOMAIEVM	Manage Element Value Mappings	Admin	SY	System Administration	20	Group Header	Grayce Applications		
<input type="checkbox"/>	AOMAIICS	Manage Interface Configuration and Sched	Admin	SY	System Administration	21	Application	Import Manufacturing Order Status Updates	AOPCPIMO	Import Manufacturing Order Status Upda
<input type="checkbox"/>	AOMCBBET	Manage Cobra Resource Templates	Admin	SY	System Administration	22	Application	Manage End Item Configurations	BMMEICN	Manage End Item Configurations

[Default My Menu](#)



Browse Applications

*Type here to search applications*

A

Click the **Show Messages and Errors** icon (or press SHIFT+F3) to view any messages and errors related to an application that is open.



Browse Applications



B

Click the **View Action and Report Status** icon to open the View Action and Report Status screen.

Use the View Action and Report Status screen to monitor the overall workload on the job server and view the status details of the jobs being processed.



Browse Applications



C

Click the **Select Company** icon to select a company.

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. Click **Save**.



Select Company

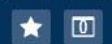
Company 1

Change Company Cancel

C

Select a company, and then click **Change Company**.

All applications should be closed before you can switch to another company.



Browse Applications

C

Once you switch to another company, the company name displays on top of the screen.



6. Others: C. Select Company



★ Browse Applications



D  
Click the **Logout** icon to sign out of Costpoint.



★  Browse Applications



This concludes the  
Costpoint User Interface Quick Steps.