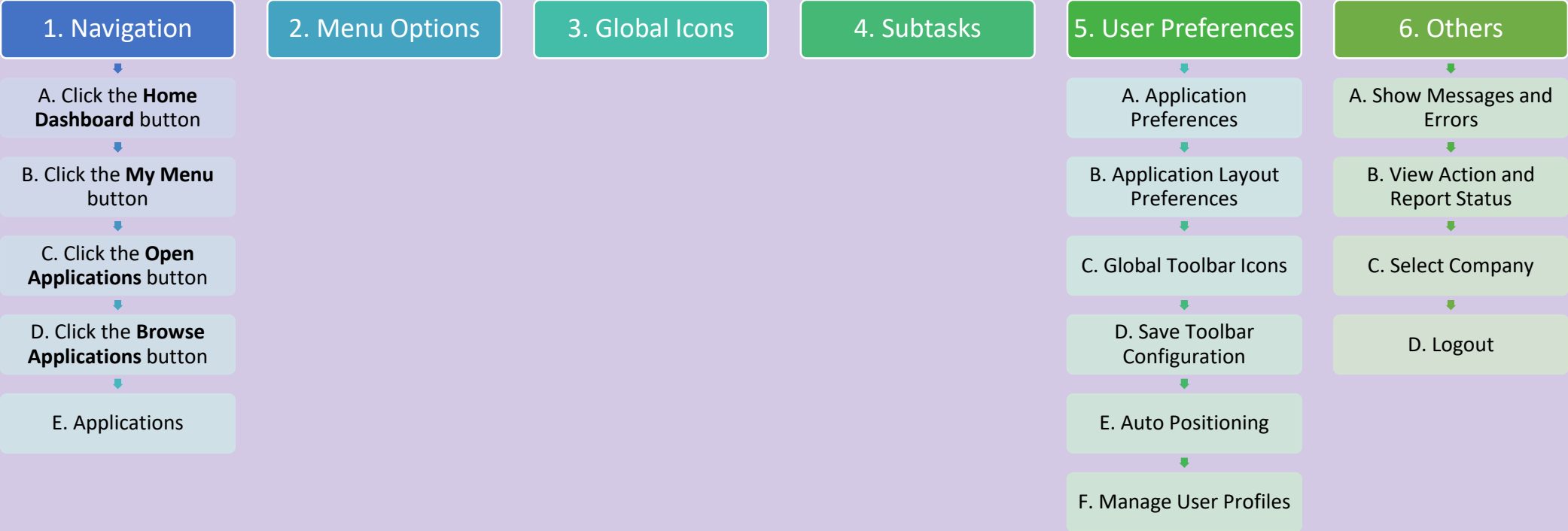


Costpoint User Interface Quick Steps

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



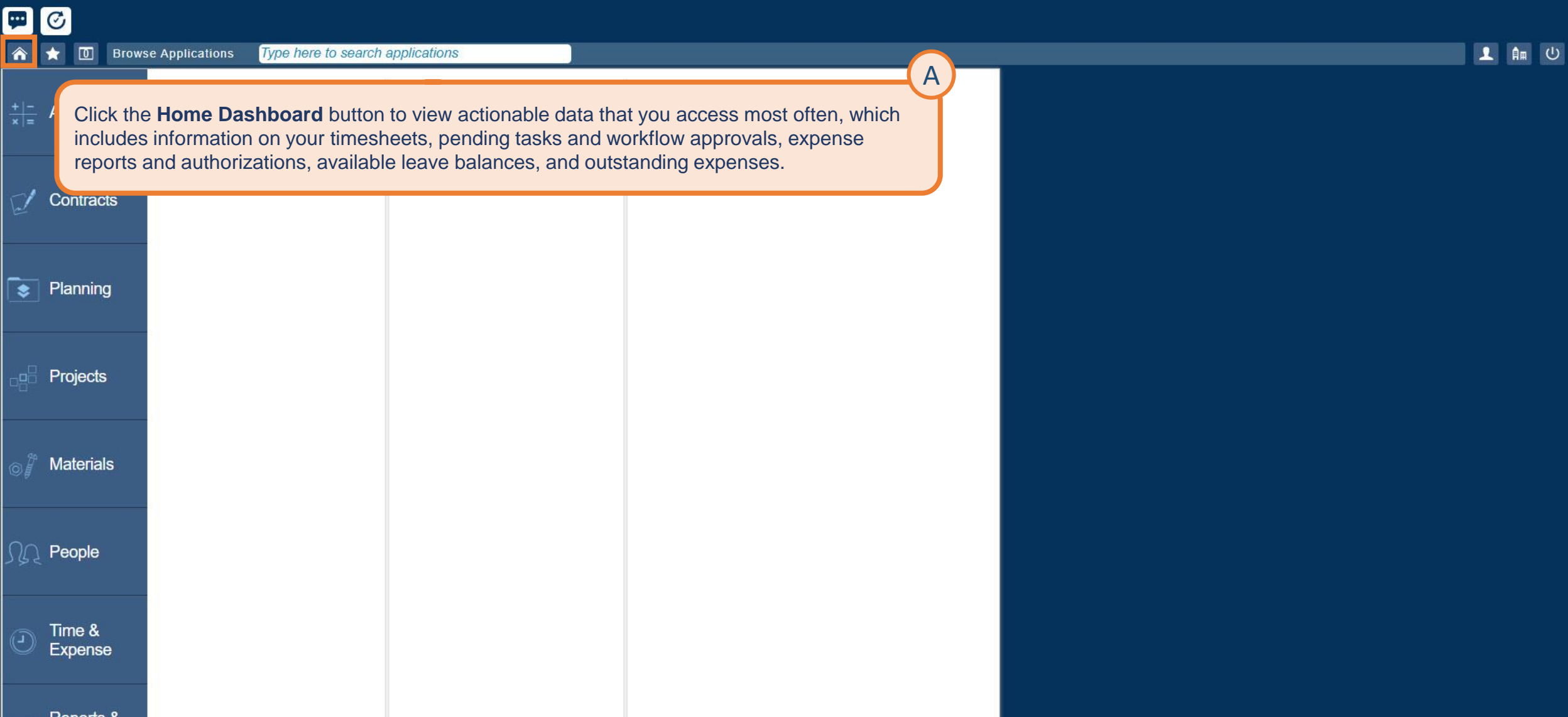
Navigation:

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

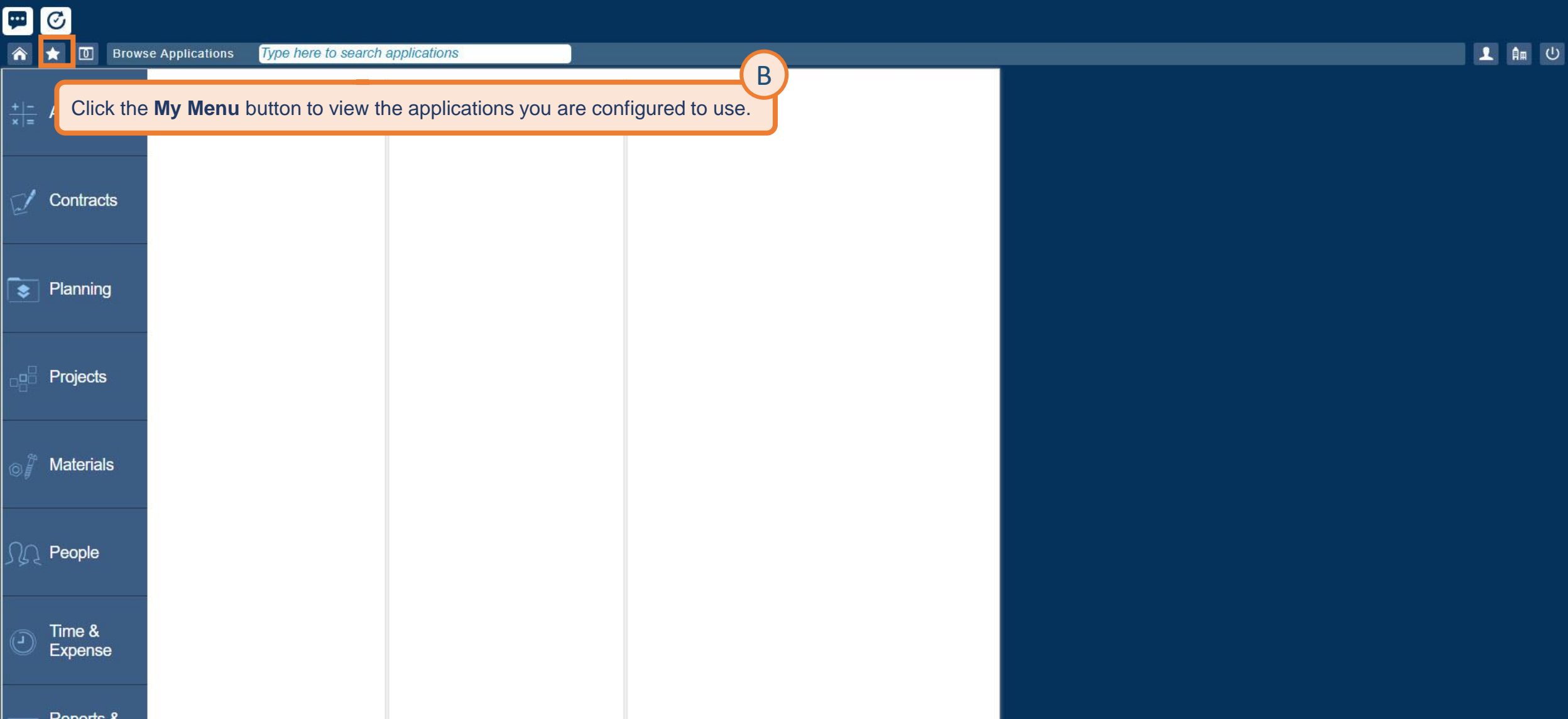


Use the **My Menu**, **Open Applications** and **Browse Applications** buttons and menu paths to open and navigate through Costpoint's domains, modules, and applications.

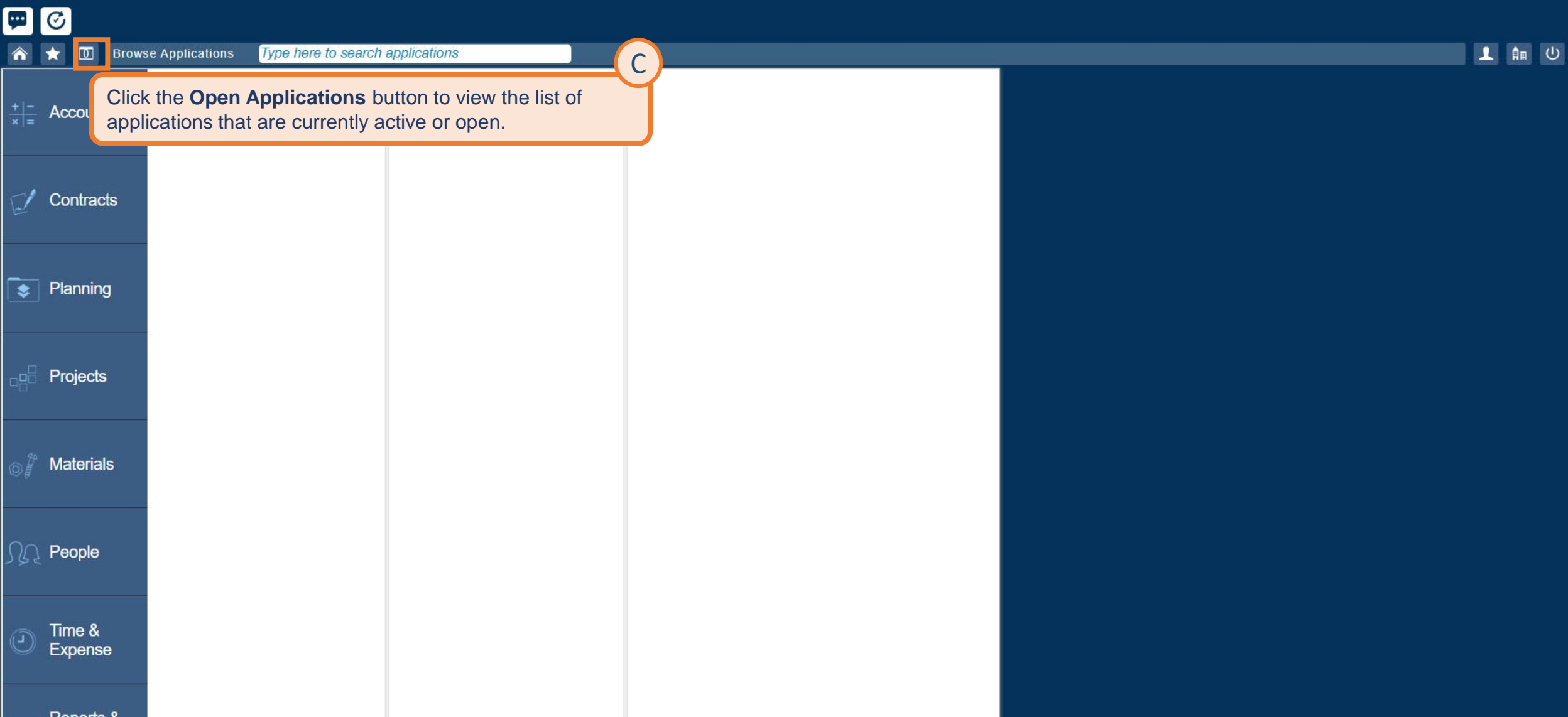
1. Navigation: Home Dashboard, My Menu, Open Applications, and Browse Applications



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

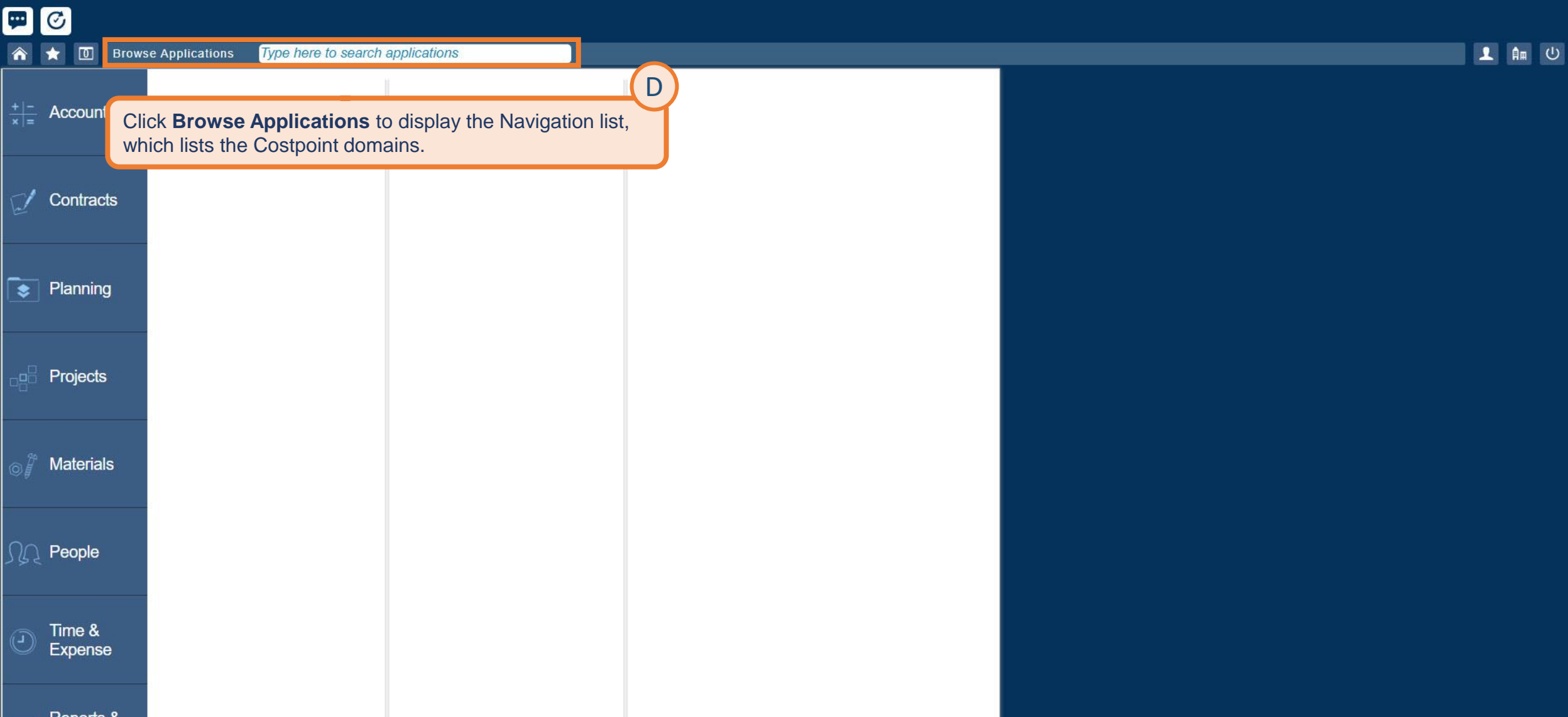


1. Navigation: B. Click the My Menu button.

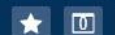


Click the **Open Applications** button to view the list of applications that are currently active or open.

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



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		
	Master		
	Material		
	Material		
People			
Reports & Analytics			
Admin			

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.

E

FILELINEOPTIONSPROCESSHELP

Action Menu

Default Action

View Action and Report Status

File Upload

File Download

2

Click the menu options to access additional functions.

Engineering Change Processing > Manage Engineering Change Notices

Identification

ECN IDDescription*

Basic InfoDetailsCustomer InformationCustomer Notes

Type*Class*PrioritySubmit for Approval

Date*Reason*Hold

Status*Approval ProcessRevision

Originator

EmployeeName*

OrganizationPhone

Impacted ProjectsApprovalsGeneral NotesTechnical NotesImplementation NotesTextDocumentsEC Impacted GroupsUser-Defined Info

NewCopyDeleteFormQuery

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

Part DocumentsMBOM ComponentsMBOM Orig AssyMBOM Chng AssyEBOM ComponentsEBOM Orig AssyEBOM Chng AssyRoutings

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.

2. Menu Options



★ Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

3

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

Identification
ECN ID Desc

Basic Info Details Customer Information Customer Notes

Type* Class* 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

New Copy ▼ Delete Form Query ▼

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

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.



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 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

New Copy Delete Form Query

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

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

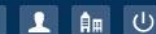
Subtasks

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.



★ Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices



New Copy ▼ Delete 1 of 1 New Table Query ▼

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

New Copy ▼ Delete Form Query ▼

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

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

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings



Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices



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* 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
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"



Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices



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

New Copy Delete Form Query

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

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"



Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

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.

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

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

Application Preferences
Manage Engineering Change Notices
 Application Layout Changes
 Global Toolbar Icon Options
Auto Positioning On ☐
 Auto Positioning resizes applications to fully utilize screen space.
Manage User Profiles

 Manage "My Menu" in "Configure User Preferences"



★ Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices



→ 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
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"



Browse Applications > Materials > Engineering Cha

D

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

Status: Pending Approval Process

Originator: Employee Organization

Name * Phone

[Impacted Projects](#) [Approvals](#) [General N](#)

Line	Action Code *	Original Part

Part Documents MBOM Components

Save Toolbar Configuration

☐ Show Toolbar Buttons with Labels

☒ Apply Configuration for Current Application Only.

Search Available

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.



Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

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

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

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

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"



Browse Applications > Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

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

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

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

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.

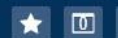
Application Layout Changes	Save	Reset
Global Toolbar Icon Options	Edit	Reset

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



Browse Applications



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 * Reason * Hold
Status * Approval Process Revision
Originator
Employee Name *
Organization Phone

Impacted Projects Approvals General Notes Technical Notes Implementation Notes

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

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.



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

View Applications **Close Applications** Cancel

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"

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

Application	Name	Domain	Module	Module Name
AOMADP25	Manage ADP 2.5 Mapping Values	People	LD	Labor
AOMADPMP	Manage ADP Mapping Values	People	LD	Labor
AOMAIELM	Manage Interface Elements	Admin	SY	System Administration
AOMAIEVM	Manage Element Value Mappings	Admin	SY	System Administration
AOMAIICS	Manage Interface Configuration and Sched	Admin	SY	System Administration
AOMCBET	Manage Cobra Resource Templates	Admin	SY	System Administration

Sequence	Line Type *	My Menu Title *	Application	Application Name
5	Application	Manage ADP 2.5 Mapping Values	AOMADP25	Manage ADP 2.5 Mapping Values
10	Application	Manage ADP Mapping Values	AOMADPMP	Manage ADP Mapping Values
15	Application	Manage Interface Elements	AOMAIELM	Manage Interface Elements
20	Group Header	Grayce Applications		
21	Application	Import Manufacturing Order Status Updates	AOPCPIMO	Import Manufacturing Order Status Upda
22	Application	Manage End Item Configurations	BMMEICN	Manage End Item Configurations

Default My Menu

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**.

Identification

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:
Phone:

Password Information

Old Password: PIN: User ID: ☒ Enable AutoComplete
New Password:
Verification:

Auto Positioning*: Yes

Change Default Period UI Profiles Message Board Subscriptions FIDO Biometric Devices

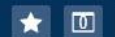
My Menu Application List

Application	Name	Domain	Module	Module Name	Select
AOMADP25	Manage ADP 2.5 Mapping Values	People	LD	Labor	
AOMADPMP	Manage ADP Mapping Values	People	LD	Labor	
AOMAIELM	Manage Interface Elements	Admin	SY	System Administration	
AOMAIEVM	Manage Element Value Mappings	Admin	SY	System Administration	
AOMAIICS	Manage Interface Configuration and Sched	Admin	SY	System Administration	
AOMCBET	Manage Cobra Resource Templates	Admin	SY	System Administration	

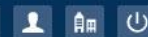
My Menu

Sequence	Line Type*	My Menu Title*	Application	Application Name
5	Application	Manage ADP 2.5 Mapping Values	AOMADP25	Manage ADP 2.5 Mapping Values
10	Application	Manage ADP Mapping Values	AOMADPMP	Manage ADP Mapping Values
15	Application	Manage Interface Elements	AOMAIELM	Manage Interface Elements
20	Group Header	Grayce Applications		
21	Application	Import Manufacturing Order Status Updates	AOPCPIMO	Import Manufacturing Order Status Upda
22	Application	Manage End Item Configurations	BMMEICN	Manage End Item Configurations

Default My Menu



Browse Applications

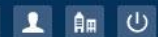
Type here to search applications

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.



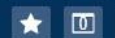
Browse Applications



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

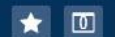
Type here to search applications



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**.



Browse Applications



Select Company

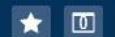
Company 1

Change Company Cancel

C

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

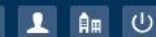
All applications should be closed before you can switch to another company.



Browse Applications

C

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





Browse Applications

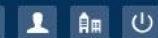


D

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



Browse Applications



This concludes the
Costpoint User Interface Quick Steps.