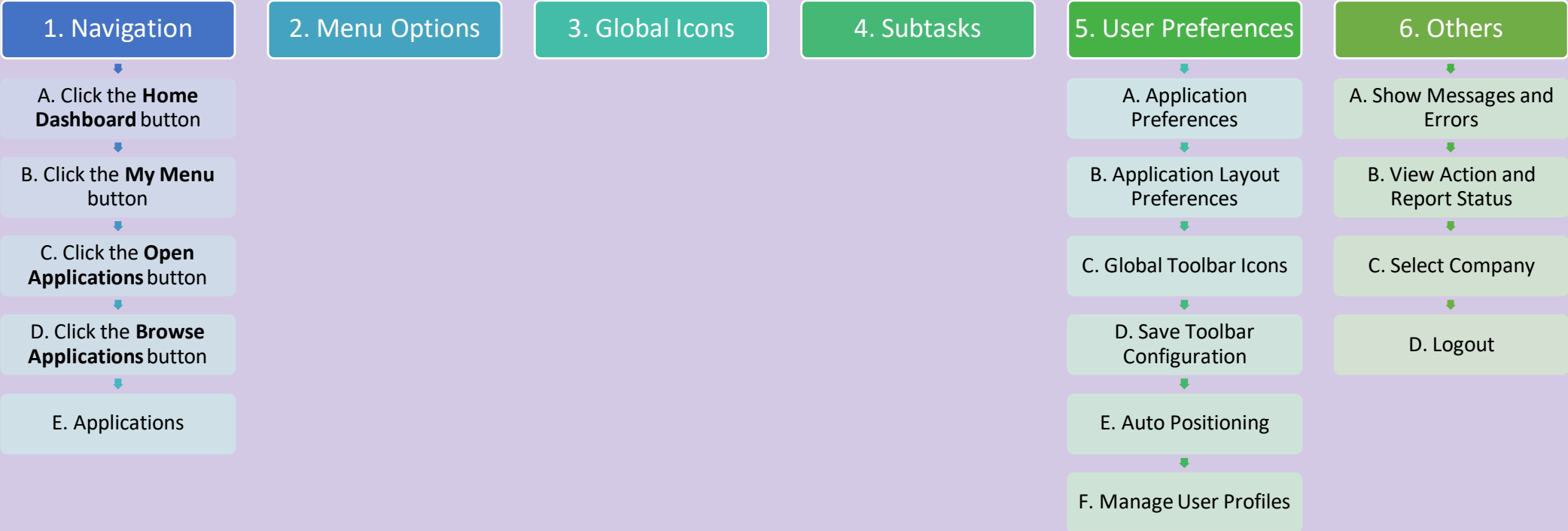


Costpoint User Interface Quick Steps

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.

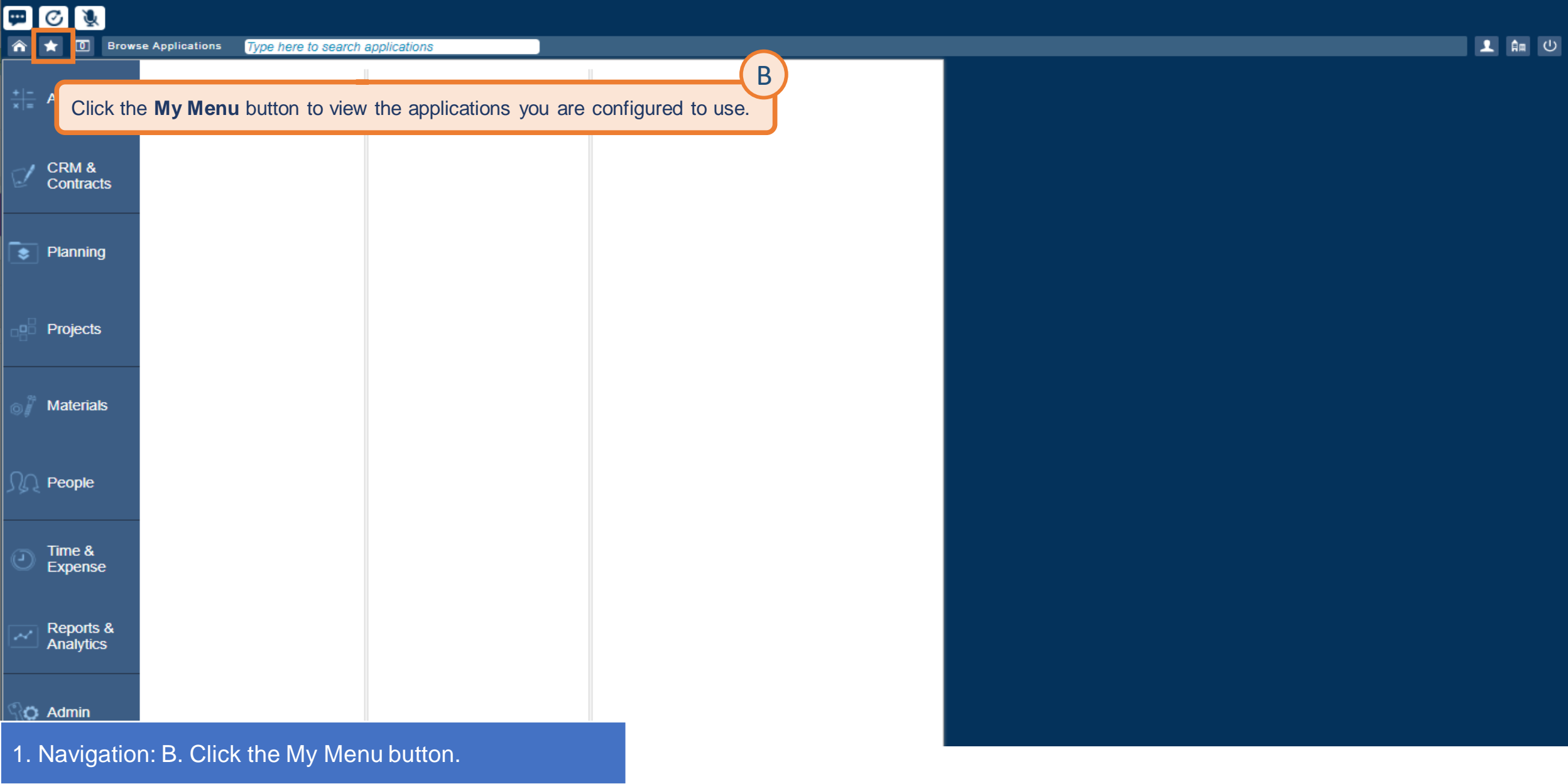


Use the **My Menu**, **Open Applications**, and **Browse Applications** buttons and menu paths to open and navigate through Costpoint's domains, modules, and applications.

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



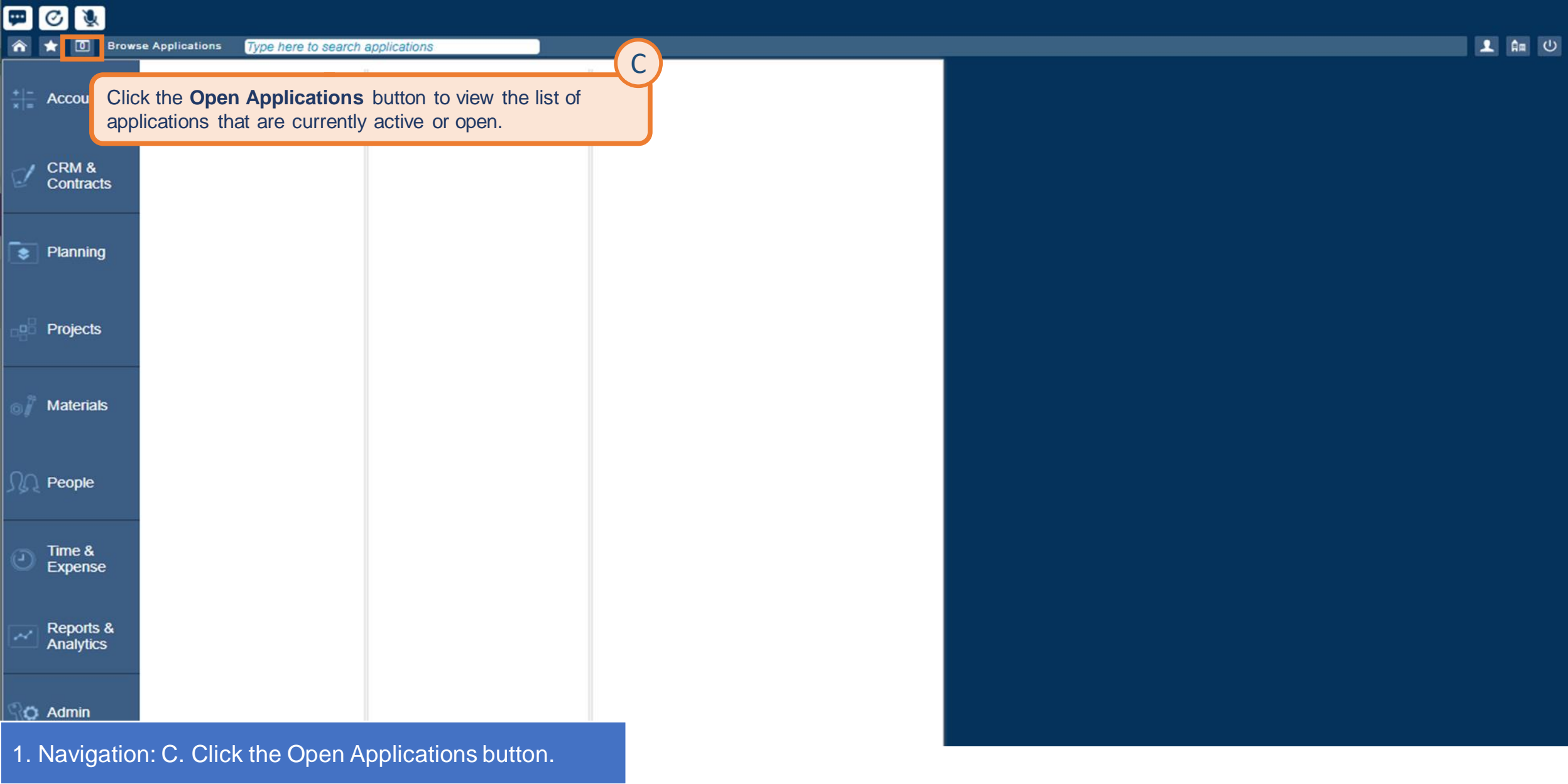
1. Navigation: A. Click the Home Dashboard button.



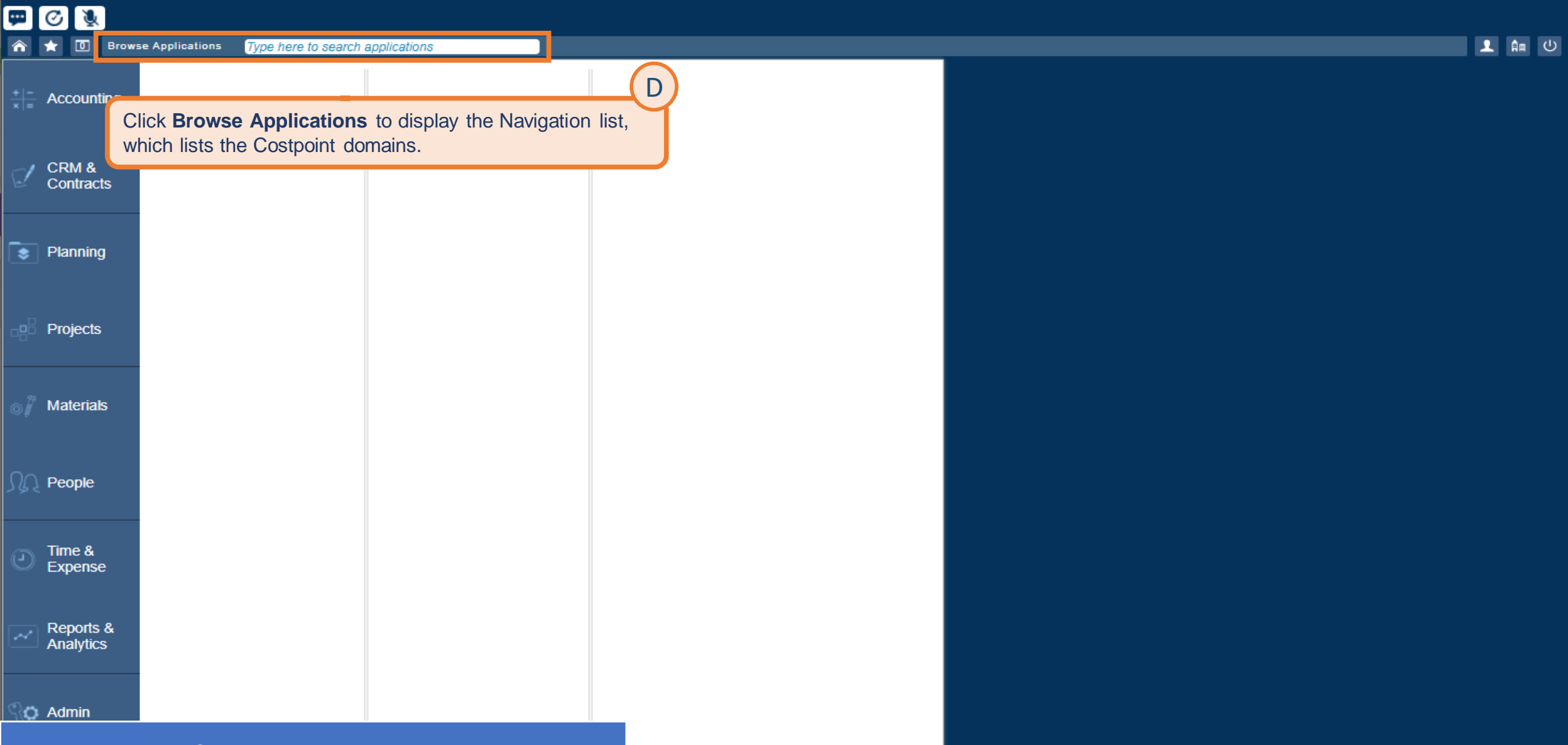
B

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

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



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



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

D

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)

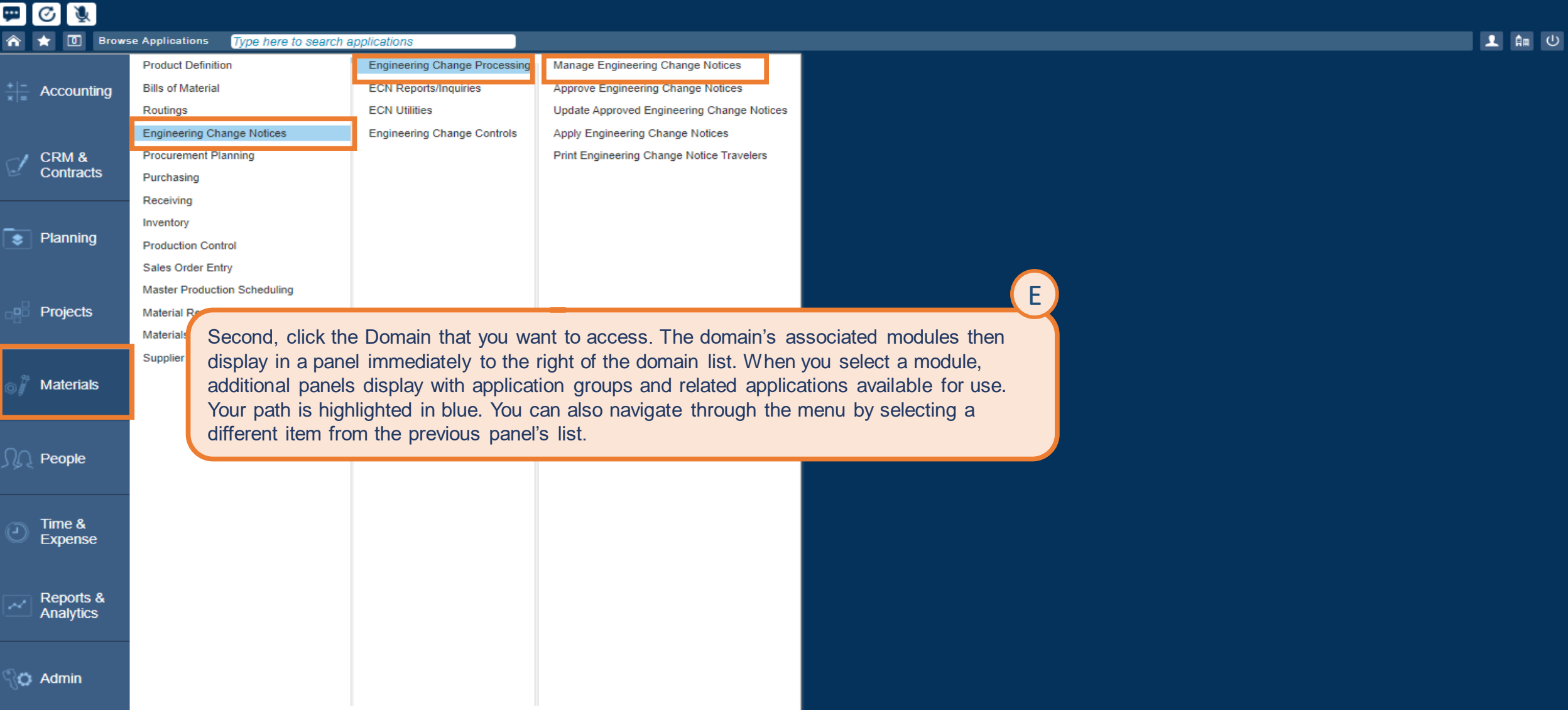
E

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.



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.

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 Info

Details

Customer Information

Customer Notes

Type*

Date*

Status*

Originator

Employee

Organization

Class*

Reason*

Approval Process

Name*

Phone

Priority

Submit for Approval

Hold

Revision

Impacted Projects

Approvals

General Notes

Technical Notes

Implementation Notes

Text

Documents

EC Impacted Groups

User-Defined Info

NewCopyDeleteFormQuery

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

Part Documents

MROM Components

MROM Orig Assy

MROM Chng Assy

EBOM Components

EBOM Orig Assy

EBOM Chng Assy

Routings

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* -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

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

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.



<div> <div>New Copy ▼ Delete Form Query ▼</div> </div>						
<input checked="" type="checkbox"/>	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](#)
[Routing](#)

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



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 * 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

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

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

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 | **Technical**
 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](#) [Technical](#)

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](#)

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.

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 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

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.

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 Name * Organization 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

→ New Copy ▼ Delete 1 of 1 New Table Query ▼

Identification
ECN ID Description *

Basic Info Details Customer Information Customer Notes

Type * Class * -Select- 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"

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



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

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



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

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

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"

Identification

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

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.

User Information: Reporting Company, Default Company*, Default Application, Application Name
 Password Information: Old Password, New Password, Verification
 Delegate Approvals: User ID
 Notification: ☒ Notify When Batch Job Is Completed Preferred
 Auto Positioning*: Yes
☒ Enable AutoComplete
☒ Enable Hey Deltek! Voice Interaction
 Enable Hey Deltek!

Application	Name	Domain	Module	Module Name	Area
AOMADP25	Manage ADP 2.5 Mapping Values	People	LD	Labor	ADP Interface
AOMADPMP	Manage ADP Mapping Values	People	LD	Labor	ADP Interface
AOMAIELM	Manage Interface Elements	Admin	SY	System Administration	System Administration Interfaces
AOMAIEVM	Manage Element Value Mappings	Admin	SY	System Administration	System Administration Interfaces
AOMAICS	Manage Interface Configuration and Sched	Admin	SY	System Administration	System Administration Interfaces
AOMCBBET	Manage Cobra Resource Templates	Admin	SY	System Administration	System Administration Interfaces
AOMCBCHG	Manage Cobra Charge Templates	Admin	SY	System Administration	System Administration Interfaces

Sequence	Line Type*	My Menu Title*	Application	Application Name
1	Application	Manage Interface Elements	AOMAIELM	Manage Interface Elements
2	Application	Manage Price Catalogs	PDMPCAT	Manage Price Catalogs
3	Application	Manage Purchase Orders	POMMAIN	Manage Purchase Orders

1 of 1 Existing

User Name * Asaka, Leslie S C.P.A.

Phone

5

To make a selection on the My Menu Application List, highlight the application and click **Select**.

Mobile Carrier -None-

Locale ID	en-US	English (United States)
-----------	-------	-------------------------

Notification

User ID

☒ Notify When Batch Job Is Completed

fault)

- ☒ Enable AutoComplete
- ☒ Enable Hey Deltek! Voice Interaction

Enable Hey Deltek!

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](#) [Notification Override](#) [FIDO/Biometric Devices](#)

Query ▼ My Menu

New Copy Delete Query —

Default My Menu



Browse Applications

Type here to search applications

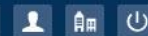


A

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



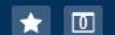
Browse Applications



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**.



Select Company

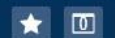
Company 1

Change Company Cancel

C

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

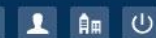
All applications should be closed before you can switch to another company.

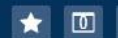


Browse Applications

C

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





Browse Applications

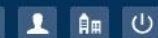


D

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



Browse Applications



This concludes the
Costpoint User Interface Quick Steps.