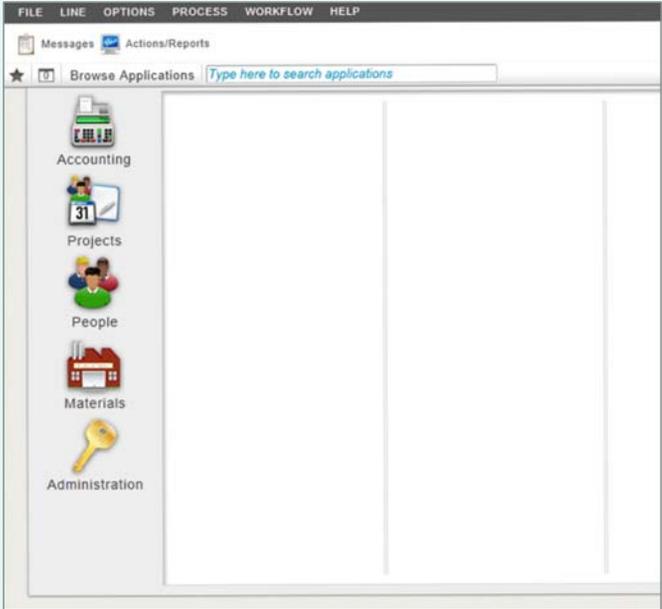


Deltek Costpoint User Interface Quick Reference Card

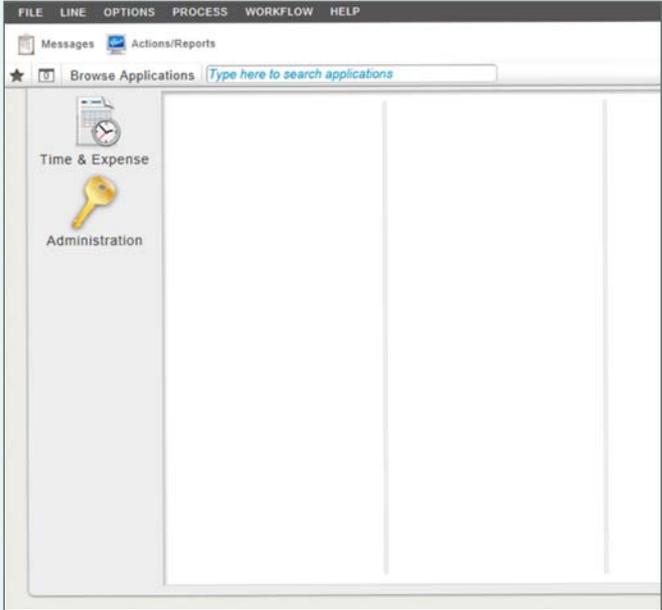
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Domains
The domains that display in the left navigation pane are determined by product licensing.



In this example, the customer is licensed for Costpoint only.

In this example, the customer is licensed for Time & Expense only.



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Navigation

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

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

Browse Applications

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 available domains.

There are two ways to open an application:

- Type the entire application name or ID, or a portion thereof, in the field to the right of the **Browse Applications** button. The application name(s) matching your entry display. 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.

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 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.

Select Company — Click this button to select the active company.

Sign Out — Click this button to exit.

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

The screenshot shows the Deltek Costpoint user interface. At the top, there is a menu bar with options: FILE, LINE, OPTIONS, PROCESS, WORKFLOW, HELP. Below the menu bar, there are buttons for Messages and Actions/Reports. A search bar for Browse Applications is present with the text "Type here to search applications". On the left side, there is a navigation pane with icons for Accounting, Projects, People, Materials, and Administration. The main area displays a list of applications, with "Engineering Change Notices" selected. A subtask list is shown for "Engineering Change Notices", including "Manage Engineering Change Notices". A detailed view of the "Manage Engineering Change Notices" screen is shown, with a subtask toolbar at the bottom. The subtask toolbar includes buttons for New, Copy, Delete, Form, and Query. A "Part Documents Subtask Screen" is also shown, displaying a table of document details.

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.

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User Preferences

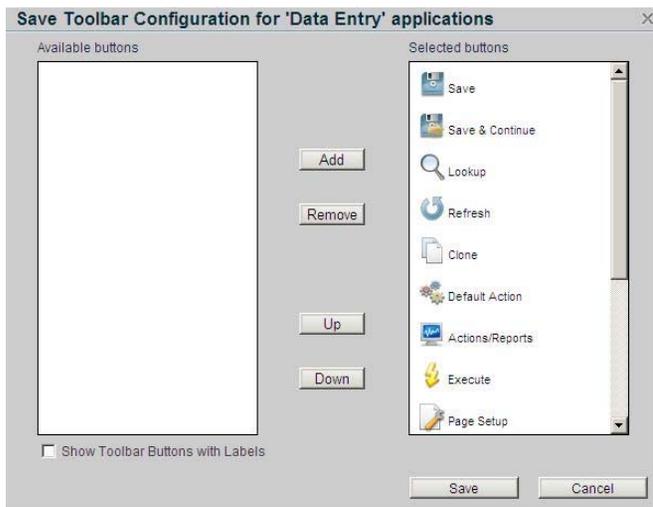
Click the **Screen Configuration** button on the main screen. The **Configure** dialog box displays for the current role. This dialog box lists the selected company, database, and validation settings.

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.

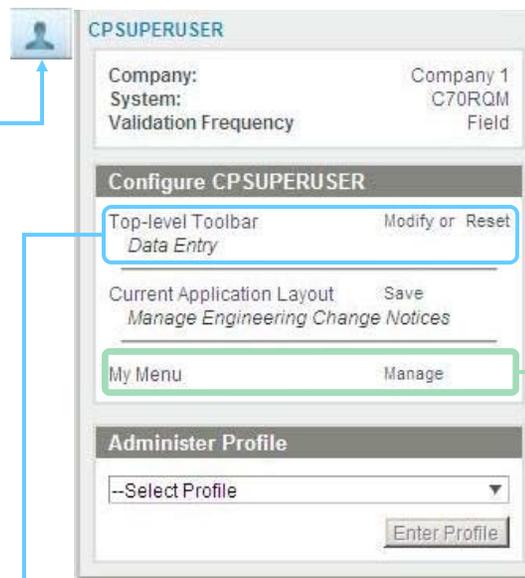
Current Application Layout — Click **Save** to lock the application and save the current layout's position and sizing for use in a later session.

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.



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.



Configure User Preferences

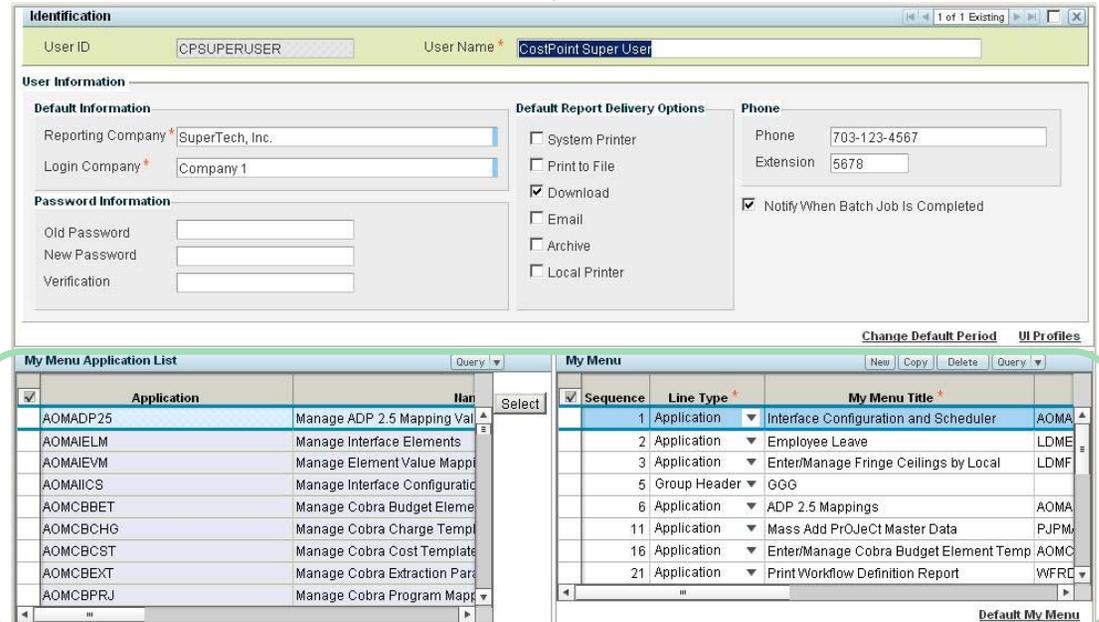
Use the group boxes on the **Configure User Preferences** screen to configure the defaults for your user preferences, applications, and menus. Selections made on this screen determine the information that displays.

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.



My Menu Table Windows

Use these table windows to select the applications that you want to include in your 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 menu.

To make a selection on the **My Menu Application List**, highlight the application on this list of all applications and click **Select**. The **My Menu** fields display information for each application and their location. 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.