Deltek Time & Expense™ 10.0 Administration Guide

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Contents

Overview

Deltek Time & Expense 10.0 is built on the Deltek Costpoint platform, and as such, it includes much new functionality related to the Costpoint framework.

The *Deltek Time & Expense 10.0 Administration Guide* is a print version of the online help associated with the Administration module screens in Deltek Time & Expense 10.0. It describes administrative tasks and procedures required to manage the software.

Time & Expense 9.0.1 also included an Administration module. In version 10.0, those screens now exist within the Configuration module.

Because online help is not yet enabled within Time & Expense 10.0, refer to this guide for information related to configuring settings in the following areas:

- System Administration
- Security
- Job Management

File Management

Manage Alternate File Locations

Use this screen to set up alternate file location information for specific users and/or user groups. The data from this screen is used by Costpoint to identify the actual disc location/folders (network drives/folders) available to Costpoint users for accepting input files or writing output files.

You can designate an alternate file location in many of the Costpoint screens. This screen's fields are optional, however, with only one exception: if you have selected the **Print to File** check box as a delivery option in the Print Options dialog box ( ), you must specify an alternate file location, unless you prefer to use the **Download** option.

You can also link an alternate file location to a specific content type for a pre-defined Content Management System (CMS) interface. After you link the alternate file location to a content type, you can generate a report file or an export file and save it to the CMS. See Saving a File to a CMS for more information. You cannot establish an alternate file location for both an URL/folder and a CMS folder.

Costpoint can be deployed in the cloud in a multi-tenancy environment. You can add new alternate file location IDs and names as well as enter a new URL/folder path without assistance from Deltek.

Set up new data in this screen after you have established users and user groups on the following screens:

- Manage Users
- Manage User Groups

Location

- Administration
- System Administration
- File Management

Alternate File Locations

Use the fields in this table window to set up alternate file location IDs, names, and URL/folders.

Alternate File Location ID

Use this field to enter an ID code for this alternate file location.

Name

Use this field to enter a new descriptive name for this **Alternate File Location ID**, or edit an existing name.

URL/Folder

Use this field to enter or edit the URL/folder data for this **Alternate File Location ID**.

The URL (Uniform Resource Locator) specifies the global address of documents and other resources on the World Wide Web. The first portion of the address indicates which protocol to use, and the second portion specifies the IP address or the domain name where the resource is located. For example, a URL (such as http://dltkas99:1234) could be used inside a workflow email message, and you could click on it and be launched directly to that web location.

Content Type

Use this field to enter, or click to select, the content type that you want to assign to files stored in a linked CMS. This content type must already be set up in the Manage Content Types screen.

Content Type Description

This field displays the description for the content type.

CMS Location

Use this field to enter, or click to select, the ID of the CMS location you want to assign to the generated content files.

CMS ID

Use this field to enter, or click to select, the ID of the CMS to which you want to link.

CMS Name

This field displays the description of the CMS.

Repository Name

Use this field to enter, or click to select, the name of the CMS repository to which you are linking.

CMS Folder

Use this field to enter, or click to select, the location of the CMS repository folder to which you are linking. This field is disabled if you did not enter a **Content Type**.

Assigned Users/User Groups

Use the fields in this table window to assign users/user groups to the alternate file locations. Users and user groups can access only the alternate file locations within Costpoint applications to which they are linked.

User/User Group

Use this field to enter, or click to select, users and/or user groups you want to link to the alternate file location. The selected user/user group, as applicable, is validated against those previously established on the Manage Users and/or Manage User Groups screens.

Name

This field displays the name associated with this user/user group.

Company

Use this field to enter, or click to select, the company to which this alternate file location and user/user group link applies.

Add an Alternate File Location

To add an alternate file location, complete the following steps:

1. Click New in the **Alternate File Locations** table window to insert a new row.
2. Enter a unique ID code in the **Alternate File Location ID** field and a descriptive name in the **Name** field for this alternate file location.
3. Enter the path to the alternate file location in the **URL/Folder** field.

4. (Optional) Enter additional information in the **Content Type**, **Content Type Description**, **CMS Location**, **CMS ID**, **CMS Name**, **Repository Name**, and **CMS Folder** fields as necessary.

5. Click .

Assign User/User Groups to an Alternate File Location

To assign users/user groups to an alternate file location, complete the following steps:

1. Select an alternate file location in the **Alternate File Locations** table window.
2. Click New in the **Assigned Users/User Groups** table window to add a new row.
3. Enter, or click to select, a user/user group to assign to the alternate file location in the **User/User Group** field and enter a descriptive name in the **Name** field.
4. Enter, or click to select, the company with which to link the alternate file location in the **Company** field.
5. Click .

Table Information

Changes to this screen update the following tables:

- W_LOCATION_LIST
  - W_LOC_USER_LINKS

FAQ

How can I change or delete alternate file location data in this screen?

In many Costpoint setup screens, established setup data is viewed as dependent data. In this circumstance, after the data is used in other setup and data entry screens, it cannot be deleted from the screen of original entry.

Although Costpoint validates alternate file location data at the point of entry, the dependent data rule is not followed in the case of deleting alternate file locations from this screen. You can delete alternate file locations on this screen, even if that location resides as data in another Costpoint screen.

Export Files

Use this screen to view, download, and/or delete data files created by Costpoint users, such as input files and reports that are stored in the Costpoint database.

Location

- Administration
- System Administration
- File Management

Application Name

This field displays the name of the application to which this file has been used or from which it was generated.

Application

This field displays the application ID for this **Application Name**.

File Name

This field displays the name of the file associated with this application.

File Description

This field displays detailed information about this file.

File Content Type

This field displays the file MIME content type of this file. You can edit this field as desired.

Keep Until

Use this field to enter, or use 🔍 to select, the date this file will be eligible for purging.

Download File

Click this button to open or save this file to your machine.

Cleanup File Catalog

Click this button to delete all expired files in the catalog. You can set the expiration date for a file using the **Keep Until** field.

Export a File

To export a file, **complete the following steps:**

1. Select a file from the table window and click **Export File**. A dialog box appears.
2. Select the **Save File** option is selected and click open. Windows explorer appears.
3. Enter or select the path or folder to which the file will be saved and click **Save**.

Table Information

Changes to this screen update the W_USER_FILE_CATLG table.

Printing

Manage Report Archive Categories

Set up this screen during initialization before you print system reports. If you plan to assign a report category to an archive report category, you must first establish report categories in the Manage Report Categories screen.

This screen contains three table window blocks, all of which display on the screen at once and function as follows:

- **Report Archive Categories** — Use this table window to set up report archive category codes and names as well as specific archive criteria regarding archive override, file purge, and archive expiration data.
- **Unassigned Report Categories** — Use this table window to view the system-designated report categories that are currently unassigned to the selected report archive category code in the **Report Archive Categories** table window.
- **Assigned Report Categories** — Use this table window to link a report category to the selected report archive category code or to view report categories already assigned to the selected report archive category code in the **Report Archive Categories** table window.

You can assign a report category to an archive category in these screens. As an alternative, you can assign an archive category to a report category in the Manage Report Categories screen.

Location

- Administration
- System Administration
- Printing

Report Archive Categories

Use the fields in this table window to set up report archive category codes and names as well as specific archive criteria regarding archive override, file purge, and archive expiration data.

Report Archive Category Code

Use this field to enter a report archive category code.

Name

Use this field to enter a descriptive name for this **Report Archive Category Code**. You can edit this field as needed.

Allow Override at Runtime

Select this check box to allow users to override the archive rules for this report archive category code at runtime.

Force Archive

Select this check box to allow users to enforce the archive rules for this report archive category code. If you select this check box, Costpoint automatically creates an archive when this report is successfully submitted.

Never Purge

Select this check box to prevent users from purging this report archive category code. If you clear this check box, you must also enter data in the **Expiration Age** and **Expiration Timeframe** fields.

Expiration Age

Use this field to enter the number of units (days, weeks, months, or years) at which reports in this archive category can be purged. You must select the desired unit from **Expiration Timeframe** drop-down list.

Expiration Timeframe

Select the unit of time (**Days**, **Weeks**, **Months**, or **Years**) from the drop-down box that applies to your numeric entry in the **Expiration Age** field and at which reports in this archive category can be purged. If this field is not applicable, **None** displays.

Unassigned Report Categories

Use the fields in this table window to view the system-designated report categories that are currently unassigned to the selected report archive category code in the **Report Archive Categories** table window. Click **Select** to move the report category from this table window to the **Assigned Report Categories** table window.

Report Category

This field displays the system-designated report category.

Name

This field displays the descriptive name for the system-designated report category.

Select

Click this button to move the selected row from the **Unassigned Report Categories** table window to the **Assigned Report Categories** table window. This action enables you to select the specific system-designated report categories that should make up each report archive category.

As an alternative, you can use from the **Report Category** field in the **Assigned Report Categories** table window to assign a report category to the report archive category.

Assigned Report Categories

Use the fields in this table window to link a previously unassigned report category to the selected report archive category in the **Report Archive Categories** table window. You can use New to add a new entry or click **Select** to move the selected row from the **Unassigned Report Categories** table window to this table window.

Report Category

Use this field to enter, or use to select, an unassigned report category to associate with the report archive category code selected in the **Report Archive Categories** table window.

Name

This field displays the descriptive name for this system-designated report category.

SET UP A REPORT ARCHIVE CATEGORY

To set up a report category archive, complete the following steps:

1. Click New in the **Report Archive Categories** table window to add a new row.
2. Enter a unique identification code for this report archive category in the **Report Archive Category Code** field and a descriptive name in the **Name** field.

3. Click New in the **Assigned Report Categories** table window to add a new row.
4. (Optional) Specify settings as necessary (**Allow Override at Runtime**, **Force Archive**, **Never Purge**, **Expiration Age**, and **Expiration Timeframe**).
5. Enter, or click to select, a report category to assign to the report archive category.
6. (Optional) Repeat steps 3 and 4 to assign more report categories.
7. Click

VIEW, ASSIGN, OR UNASSIGN A REPORT CATEGORY

To view assigned and unassigned report categories in a report archive category, select a report archive category in the **Report Archive Categories** table window. Assigned and unassigned report categories are displayed in the **Assigned Report Categories** and **Unassigned Report Categories** table windows.

- To assign a report category, click New and then enter, or click to select, the report category to add in the **Report Category** field of the newly added row.
- To unassign a report category, select a report category in the **Assigned Report Categories** table window and then click Delete.

Table Information

Changes to this screen update the following tables:

- W_RPT_CATGR
    - W_RPT_ARCH_CATGR

FAQ

What are the system-designated report categories that can be assigned to report archive categories?

The following table lists the system-designated report categories that can be assigned to report archive categories.

Report Category	Report Category Name
POSTNGJNLS	Posting Journals
CUSTBILLS	Customer Bills/Invoices
FINSTMTS	Financial Statements
COMPLIANCE	Compliance reports (1099s, W2s)
PURCHORDER	Purchase Orders
RFQ	Request For Quotes
PURCHREQS	Purchase Requisitions
RECPTTRVLR	Receipt Traveler
SALESORDER	Sales Orders (Acknowledgements, Packing Slips)

Report Category	Report Category Name
PURGEARCHV	Purge/Archive
INTERNAL	Internal
PROCESS	Process
INTRNEXTRN	Internal/External
DEBITMEMO	Debit Memo
CHECKS	Checks
EMPLOYEE	Employee
ECNTRVLR	ECN Traveler

Manage Report Categories

Use this screen to enable/disable certain report permissions and view system-assigned reports individually for each report category.

You can assign an archive category to a report category in this screen. You can also assign a report category to an archive category in the Manage Report Archive Categories screen.

Set up this screen during initialization and before you print system reports. If you plan to assign an archive category to a report category, you must first establish archive categories in the Manage Report Archive Categories screen.

Location

- Administration
- System Administration
- Printing

Report Categories

Use this table window to enable/disable permissions to print, print to file, download, email, archive, print cover page, audit report delivery, and/or assign a report archive category to each report category pre-loaded into Costpoint.

Report Category

This field displays the report category ID code generated by Costpoint.

Report Category Name

This field displays the report category name for this **Report Category**.

Allow System Printer

Select this check box to allow users to print reports from this report category using a system printer.

Allow Print To File

Select this check box to allow users to save reports as files from this report category.

Allow Local Printer/Download

Select this check box to allow users to save reports as a file or print reports using a local printer from this report category.

Allow Email

Select this check box to allow users to send reports from this report category through email.

Allow Archive

Select this check box to allow users to archive reports from this report category. If this check box is cleared, you can still use the Archive function but Costpoint will display an error message when you attempt to print the report.

Report Archive Category

Use this field to enter, or use to select, a report archive category.

You must first establish archive categories in the Manage Report Archive Categories screen.

Report Archive Category Name

This field displays the descriptive name for the **Report Archive Category**.

Print Cover Page

Use this drop-down list to indicate whether or not the cover page should print with the report for this report category. The options are as follows:

- **Yes** — Select this option if you want to print a cover page.
- **No** — Select this option if you do not want to print a cover page.
- **System Default** — Select this option if you want to use the default setting specified in the Configure System Settings screen.

Audit Report Delivery

Select this check box to enable Costpoint to insert a record into the report audit table (W_RPT_AUDIT) that contains all the report parameters when a report is successfully printed/emailed for this report category.

Assigned Reports

Use this table window to view the individual system-assigned reports assigned to the selected report category in the **Report Categories** table window.

Report

This field displays the report ID assigned to the **Report Category** field in the **Report Categories** table window.

Name

This field displays the system-designated report category name.

Table Information

Changes to this screen update the W_RPT_CATGR table.

FAQ

What are the system-assigned report categories?

The following table lists the system-assigned report categories:

Report Category	Report Category Name
POSTNGJNLS	Posting Journals
CUSTBILLS	Customer Bills/Invoices
FINSTMTS	Financial Statements
COMPLIANCE	Compliance reports (1099s, W2s)
PURCHORDER	Purchase Orders
RFQ	Request For Quotes
PURCHREQS	Purchase Requisitions
RECPTTRVLR	Receipt Traveler
SALESORDER	Sales Orders (Acknowledgements, Packing Slips)
PURGEARCHV	Purge/Archive
INTERNAL	Internal
PROCESS	Process
INTRNEXTRN	Internal/External
DEBITMEMO	Debit Memo
CHECKS	Checks
EMPLOYEE	Employee
ECNTRVLR	ECN Traveler

Manage Report Fonts

Use the fields in this screen to establish a catalog of report fonts that will be available for selection when printing reports from Costpoint. The fonts that you enable in this screen must first be installed at the Actuate report server.

Four system fonts are pre-loaded: **Arial**, **Arial Narrow**, **Courier New**, and **Times New Roman**. You can enable additional user fonts of your choice after they are installed at the Actuate report server.

Set up this screen during initialization before you are ready to print or view reports. You must also set up this screen before you assign a default font for each company in the Configure System Settings screen and before you attempt to override the default font in the Page Setup dialog box at report print/view time.

Location

- Administration
- System Administration
- Printing

Font Name

You cannot edit or delete the pre-loaded system fonts.

Use this field to enter, or use to select, the name of the font you want to add to the report fonts list.

Source

This field displays either **System Font** if the **Font Name** is one of the pre-loaded system fonts or **User Font** if the **Font Name** is a user-added font.

Available at Runtime

Select this check box to make this font available for use at runtime.

Table Information

Changes to this screen update the W_RPT_FONTS table.

FAQ

Are any default fonts automatically available?

The following fonts are automatically provided to the Actuate report server when you install Costpoint, and cannot be deleted.

Font Name	Source	Available at Runtime
Arial	System Font	Yes (Checked)
Arial Narrow	System Font	Yes (Checked)
Courier New	System Font	Yes (Checked)
Times New Roman	System Font	Yes (Checked)

How can I add additional fonts?

You can add additional fonts to the Actuate report server outside of Costpoint by following the Actuate Server Administration installation instructions. When the additional fonts are installed, you will add them in this screen to make them available for viewing/reporting.

The functionality in this screen is similar to the Manage System Printers application, in which you must first install additional printers to the Actuate server before you make those printers available in Costpoint.

Why do some reports ignore the font I have selected?

Some reports (for example, specifically designated government reports such as the DD250) are created by the system to always print using a pre-selected, hard-coded font. In these cases, the font selected in the Configure System Settings screen or specified as an override at report print/view time will be disregarded.

It is possible that a font available on the Actuate server is not available on your machine (where the browser is located). In this circumstance, the browser cannot display the font and will use the browser's default font as designated in the Internet Explorer Settings (**Internet Explorer » Tools » General » Fonts**).

Manage Report Groups

Use this screen to establish report groups and enable/disable certain report permissions and view individually system-assigned reports for each report group.

Set up this screen during initialization and before you print system reports.

Location

- Administration
- System Administration
- Printing

Report Groups

Use this table window to set up report groups.

Report Group ID

Use this field to enter a report group ID.

Report Group Name

Use this field to enter a descriptive name for the **Report Group ID**.

Description

Use this field to enter detailed information about this report group.

Unassigned Reports

Use the fields in this table window to view the system-designated report that are currently unassigned to the selected report group in the **Report Groups** table window. Click **Select** to move the report category from this table window to the **Assigned Report Categories** table window.

Report Name

This field displays the descriptive name of this **Report**.

Report

This field displays the report ID.

Report Category Name

This field displays the report category name with which this **Report** is associated.

Archive Category Name

This field displays the report archive category with which this **Report Category Name** is associated.

Select

Click this button to move the selected row from the **Unassigned Reports** table window to the **Assigned Reports** table window. This action enables you to select the specific system-designated reports that should make up each report group.

Assigned Reports

Use the fields in this table window to link a previously unassigned report category to the selected report archive category in the **Report Archive Categories** table window. Click **Select** to move the selected row from the **Unassigned Reports** table window to this window or click New to add a new line on this table window.

Report Name

Use this field to enter, or use to select, the descriptive name of the report you want to associate with the selected report group in the **Report Groups** table window. If you use this field, the **Report**, **Report Category Name**, and **Archive Category Name** fields automatically populate with the corresponding data.

Report

Use this field to enter, or use to select, the report ID you want to associate with the selected report group in the **Report Groups** table window. If you use this field, the **Report Name**, **Report Category Name**, and **Archive Category Name** fields automatically populate with the corresponding data.

Report Category Name

This field displays the report category name with which this **Report** is associated.

Archive Category Name

This field displays the report archive category with which this **Report Category Name** is associated.

Table Information

Changes to this screen update the following tables:

- W_RPT_GROUP_LINKS
- W_RPT_GROUP_LIST

Manage System Printers

Use this screen during initialization to set up one, some, or all of the system printers available for printing reports in Costpoint.

Set up this screen before you use the printing features in Costpoint. Also, you must first establish users and/or user groups in either the Manage Users or Manage User Groups screen.

You must first install the printer(s) on the Costpoint application server using your Costpoint Service account. Confirm that the printers work and then restart Costpoint service on the Costpoint application server. You can them log into Costpoint and use the table window in this block to establish a catalog of printers installed in the Actuate report server that will be available for selection when printing reports from Costpoint.

Location

- Administration
- System Administration

- Printing

System Printers Table Window

Use the table window in this block to establish a catalog of printers installed in the Actuate report server that will be available for selection when printing reports from Costpoint.

Use New to add a new entry to the table window.

Printer ID

Use this field to enter, or use to select, a printer ID for use in Costpoint. The printer data available for selection must already have been installed to the Actuate report server.

displays other printer attributes from the Actuate server, these attributes are as follows:

- Printer Options (including data such as resolution, paper tray options, and so on)
- Manufacturer
- Model
- Description
- Location

Printer Name

Use this field to enter a descriptive name for this **Printer ID**.

Verify Printers

Select a printer from the table window and click this button to verify the availability of that printer.

Subtasks

Subtask	Description
Assigned Users / User Groups	Click this link to open the Assigned Users/User Groups subtask and optionally link specific users and/or user groups to one or more printers in the primary table window.
Assigned Report Categories	Click this link to open the Assigned Report Categories subtask and optionally link specific report categories to one or more printers in the primary table window and assign **Allow** or **Deny** rights to the report category/printer combination.

Table Information

Changes to this screen update the following tables:

- W_PRINTER_LIST
  - W_PRN_USER_LINKS
  - W_PRN_RPTCT_LINKS

FAQ

What is the source of the Lookup data in the Printer ID field?

The initial printer data is added to the Actuate report server outside of Costpoint by following the Actuate Server Administration instructions. After the printer data resides within the Actuate server, you can add the desired printers in this screen to make them available for Costpoint reporting.

Workspace Customization

Manage Standard Label Customizations

Use this optional screen to enter customized labels for a set of standard labels. The list of standard labels is non-editable. You cannot add new labels to the list. Currently, there are seven standard labels:

- Account
- Customer
- Employee
- Organization
- Project
- Vendor
- Warehouse

After you add your customized labels to this screen and save it, applications and reports that display the standard labels now display the customized text. For example, if you change **Customer** to **Client**, **Client** displays in place of **Customer** in screens and reports throughout Costpoint. You do not need to reboot the application server. Customized labels are seen by users in all companies.

To ensure that screens and reports can accommodate new labels, customized labels are restricted to a maximum of 15 alphanumeric characters. Special characters, including spaces, are not allowed. Note that if a customized label exceeds the length of the standard label, it may not fit correctly on applications or reports.

You cannot partially fill out a row. If you begin filling out a row, you must complete it.

Location

- Administration
- System Administration
- Workplace Customization

Table Window

Standard Full Word Singular

This non-editable field displays the singular form of a standard label.

Custom Full Word Singular

Enter the singular form of the custom label. This label replaces the **Standard Full Word Singular** label on Costpoint screens and reports.

Standard Full Word Plural

This non-editable field displays the plural form of a standard label.

Custom Full Word Plural

Enter the plural form of the custom label. This label replaces the **Standard Full Word Plural** label on Costpoint screens and reports.

Standard Abbreviated Word Singular

This non-editable field displays the singular form of an abbreviated standard label.

Custom Abbreviated Word Singular

Enter the singular form of the custom label. This label replaces the **Standard Abbreviated Word Singular** label on Costpoint screens and reports.

Standard Abbreviated Word Plural

This non-editable field displays the plural form of an abbreviated standard label.

Custom Abbreviated Word Plural

Enter the plural form of the custom label. This label replaces the **Standard Abbreviated Word Plural** label on Costpoint screens and reports.

Table Information

Changes to this screen update the W_TERMS_DICTIONARY table.

Standard labels are stored in the S_TERMS_DICTIONARY table.

Manage User Interface Profiles

Use this screen to add, modify, or delete user interface profiles. A UI profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities. These UI profiles allow you to easily switch between customized Lookup tables, My Menu, and extensibility units that are specific to certain jobs, processes, or functions.

You must first set up the following screens before you can enter data on this screen:

- Manage Users
- Manage User Groups

To create a new user interface profile, complete the following steps:

1. Click New on the **UI Profile** block.
2. Enter a unique ID code to identify this user profile in the **UI Profile ID** field.
3. Enter a descriptive name for this UI profile ID in the **UI Profile Name** field.
4. Enter a number in the **Priority** field to determine this UI profile's priority level.
5. Use the Assigned Users/User Groups subtask to specify user or user group profile can access this UI profile in the **User/User Group** field as well as the company to which this UI profile applies.
6. Use the Extensibility Units subtask to specify and enable extensibility units to use in this UI profile.
7. Use the My Menu subtask to set up My Menu preferences for this UI profile.
8. Click on the toolbar.

To use a UI profile, set the **Priority** field of the UI profile you want to use to '1'. Costpoint does not allow duplicate priority numbers on multiple UI profiles. If you are setting a UI profile to priority '1', you must change the priority number of the UI profile you are replacing to another number.

Screen customization allows you to:

- Rearrange the position of objects on a screen (for example, fields, labels, and check boxes).
- Move an object from one tab to another tab within a screen or result set.

- Change the titles of group boxes.
- Create new group boxes.
- Rearrange the tabbing order of fields.
- Rearrange the columns in a table. (This is a company-wide custom option.)
- Change the title of tabs.
- Create new tabs.
- Change the order of tabs on a screen.

To customize an application for a UI profile, complete the following steps:

1. Close all applications and click .
2. Select the UI profile you want to modify and click **Enter Profile**.
3. Open the application you want to customize and modify the screen.
4. Click and click **Save** beside **Current Application Layout**.
5. Close all applications, click , and click **Exit Profile**.

Location

- Administration
- System Administration
- Workspace Customization

UI Profile ID

Use this field to enter an ID code for this UI profile.

UI Profile Name

Use this field to enter a descriptive name for this **UI Profile ID**.

Priority

Use this field to enter a sequence number for this UI profile. This determines which UI profile takes precedence.

Subtasks

Subtask	Description
Assigned Users/User Groups	Click this link to open the Assigned Users/User Groups subtask and specify the users and/or user groups that can access a UI profile.
Screen Customizations	Click this link to open the Screen Customizations subtask and view the current customizations enabled for a UI profile.
Extensibility Units	Click this link to open the Extensibility Units subtask and associate extensibility units to a UI profile.
My Menu	Click this link to open the My Menu subtask and specify My Menu settings for a UI profile.

SCREEN CUSTOMIZATIONS

Use this subtask to view the current customizations applied to a UI profile.

Customization Type

This field displays the customization types currently applied to this UI profile. The customization types are:

- **TOOLBAR** - This type indicates that there are screen customizations applied to the toolbar.
- **LOOKUP** - This type indicates that there are screen customizations applied to the lookup tables.
- **APPLICATION** - This type indicates that there are screen customizations applied to an application.

Customization Description

This field displays a brief description of the **Customization Type**.

When the **Customization Type** field displays **TOOLBAR**, this field displays one of the following descriptions:

- **Data Entry -** This description indicates that one or more data entry tools are customized.
- **Inquiry -** This description indicates that one or more inquiry tools are customized.
- **Process** - This description indicates that one or more process tools are customized.
- **Report -** This description indicates that one or more report tools are customized.

When the **Customization Type** field displays **LOOKUP**, this field displays the customized Lookup RS ID and Lookup Column ID, separated by a tilde (~) (for example, ITEMREV_LKP~ITEM).

When the **Customization Type** field displays **APPLICATION**, this field displays the customized application screen represented by the application ID and application name, separated by a colon (:) (for example, APMVCHR: Manage Accounts Payable Vouchers).

EXTENSIBILITY UNITS

Use this subtask to associate extensibility units to a UI profile. An extensibility unit is a logical collection of customized software components which includes business logic rule modifications and additions as well as screen customization modifications.

Extensibility Unit

Use this field to enter, or use to select, an extensibility unit to associate with this UI profile.

Name

This field displays the descriptive name of the **Extensibility Unit**.

Valid

This field displays **Y** if this extensibility unit can be used for this UI Profile. Otherwise, this field displays **N**. When you select an invalid extensibility, Costpoint displays the following warning message before you can continue: "This Extensibility Unit is invalid."

Active

Select this check box to enable this extensibility unit for this UI profile.

MY MENU

Use this subtask to set up My Menu for a UI Profile. My Menu allows you to access shortcuts to the applications you frequently use without navigating through the entire Costpoint menu. You can access My Menu by clicking located on the upper-left portion of your screen.

My Menu Application List

This table window displays a list of all the Costpoint applications from which you can select those to include on My Menu. The fields in this table window display all of the pertinent information for each application and their location within Costpoint.

To select applications to include on My Menu, select the application on this list of all Costpoint applications, and then click **Select**. The selected application is then moved to the **My Menu** table window to verify that it is now included on My Menu.

Application

This field displays the ID code of this application.

Name

This field displays the descriptive name of this **Application**.

Domain

This field displays the domain where this application is located. Costpoint is broken down into five domains where applications that perform one general function are grouped together by module and then by area of function. The domains are:

- Accounting
- Projects
- People
- Materials
- Administration

Module

This field displays the ID of the module where this application is located. Costpoint domains are broken down into modules where related applications are grouped together by their area of function.

Module Name

This field displays the descriptive name of this **Module**.

Area

This field displays this application's area of function.

My Menu

Use this table window to set up a list of applications you can access using My Menu.

Click New to add a new entry to this table window or select an application from the **My Menu Application List** table window and click **Select** to add that application to this table window.

Sequence

Use this field to enter sequence numbers to determine the order of the menu items displayed on My Menu. Use this field to arrange or rearrange the order in which applications and headers displays on My Menu.

Line Type

Use this drop down list box to select whether this entry is an **Application** or **Header**.

If you select **Application**, you must then enter a descriptive title to identify this application in the **My Menu Title** field and specify the application ID in the **Application** field. If you used the **My Menu**

Application List table window to select an application, this field automatically selects **Application** as the line type and Costpoint automatically populates the rest of the fields.

If you select **Header**, you must then enter a descriptive name for this group header. This group header acts as an expandable/collapsible separator for your application groupings.

My Menu Title

Use this field to enter a descriptive title to identify this application or group header. This title is what displays on My Menu. If you used the **My menu Application List** table window to an application, Costpoint automatically populates this field.

Application

Use this field to enter, or use to select, the ID code of the application you want to include on My Menu. If you used the **My Menu Application List** table window to select an application, Costpoint automatically populates this field.

Application Name

This field displays the name of the selected application.

Table Information

Changes to this screen update the following tables:

- W_UI_PROF
- W_UI_PROF_MYMENU
- W_UI_PROF_EXT_UNITS
- W_UI_PROF_USERS

Manage Extensibility Units

Use this screen to view available extensibility units, the applications customized by these extensibility units, and email events that exist in an extensibility unit. An extensibility unit is a logical collection of customized software components which includes business logic rule modifications and additions as well as screen customization modifications.

You can also use this screen to associate an extensibility unit with UI profiles. You must first set up the Manage User Interface Profiles screen before you can associate extensibility units with UI profiles.

To associate an extensibility unit with a UI profile, complete the following steps:

1. Select an extensibility unit in the **Extensibility Units** table window.
2. In the UI Profiles subtask, click New to add a new record.
3. Enter, or use to select, the UI profile you want to associate with this extensibility unit in the **UI Profile** field.
4. Select the **Active** check box to enable this UI profile to use this extensibility unit.
5. Click on the toolbar.

Location

- Administrative

- System Administration
- Workspace Customization

Extensibility Units

Use this table window block to view information about all available extensibility units.

Extensibility Unit ID

This field displays the identification code for this extensibility unit.

Extensibility Unit Name

This field displays the descriptive name for this **Extensibility Unit ID**.

Valid

This field displays **Y** if this extensibility unit is valid. Otherwise, this field displays **N**.

Notes

This field displays additional notes about this extensibility unit.

Subtasks

Subtask	Description
UI Profiles	Click this link to open the UI Profiles subtask associate extensibility units with UI profiles.
Applications	Click this link to open the Applications subtask to view a list of applications customized by an extensibility unit.
Email Events	Click this link to open the Email Events subtask

Table Information

Changes to this screen update the W_UI_PROF_EXT_UNITS table.

System Administration Reports/Inquiries

Print Application Table Information Report

Use this screen to print a table information report for one or more applications. This report allows you to view all the tables accessed by applications in order to perform their functions.

After entering your specifications and options, click to start printing the application table information report.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use the fields in this group box to specify the applications you want to include in this report.

Application

Use this drop-down list box to select the desired range of applications you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.

- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Start

Use this field to enter, or use to select, the starting application ID, as applicable.

End

Use this field to enter, or use to select, the ending application ID, as applicable.

Table

Use this drop-down list box to select whether to include **All** or only **One** application table in this report. If you select **One** from this drop-down list box, enter, or use to select, the name of the table you want to include in the field to the right.

Column

Use this drop-down list box to select whether to include **All** or only **One** table column in this report. If you select **One** from this drop-down list box, enter, or use to select, the name of the column you want to include in the field to the right.

Sort By

Use the drop-down list boxes in this group box to determine the primary sort, secondary sort, and page break settings.

1st Sort

Use this drop-down list box to select whether to primarily sort this report by **Application Name**, **Module**, or **Table**.

2nd Sort

Use this drop-down list box to select whether to sort this report again, based on your selection in the **1st Sort** drop-down list box, by **Application Name**, **Column**, **Table Tab Order**, **Column Label**, or **Table**.

Options

Use the check box in this group box to include non-editable fields in this report.

Include Non-Editable Fields

Select this check box to include non-editable fields in this report.

Print Archived Reports

Use this screen to view a list of reports that are currently archived in the Costpoint database. Reports are archived when you select the **Archive** check box in the Print Options dialog box (accessed by clicking on the toolbar) or there is a system setting that automatically archives a report (for example, when the Archive check box in the Configure User Preferences screen is selected). You can also edit the **Archive File Description** and the **File Expires** data. In addition, depending on your report archive rights, you can also delete archived reports.

You can use on the toolbar to print the information from this screen. Use one of the following options:

- **Current Record Information - Vertical Layout** — Use this option to print the selected archived report in the table window in top-to-bottom reading format.
- **Current Record Information - Horizontal Layout** — Use this option to print the selected archived report in the table window in table format.
- **Queried Records Information - Horizontal Layout** — Use this option to print all archived reports displayed in the table window. You can use Query to display specific archived reports you want to include in this report.

Archive File Name

This field displays the identification code for this report file.

The archive file name for a report is generated in two ways:

- The user who generated this report specified the archive file name for this report in the Print Options dialog box.
- Costpoint automatically derives this archive file name using a naming convention that makes use of the report application's identification code and then a sequential numbered instance of that application. For example, for the Indented Bills of Material report, Costpoint assigns 'BMRSLMLB' as the archive file name for the first instance of the report, 'BMRSLMLB_1' for the second instance of the report, 'BMRSLMLB_2' for the third instance of the report, and so on. This happens when a system setting automatically archives this report.

Archive File Description

This field displays the descriptive name for this **Archive File Name**. You can updated this field as desired.

The description for a report is generated in two ways:

- The user who generated this report specified the archive description for this report in the Print Options dialog box.
- Costpoint automatically derives this archive description using a naming convention that makes use of the report application's identification code and then a sequential numbered instance of that application. For example, for the Indented Bills of Material report, Costpoint assigns 'BMRSLMLB' as the archive file name for the first instance of the report, 'BMRSLMLB_1' for the second instance of the report, 'BMRSLMLB_2' for the third instance of the report, and so on. This happens when a system setting automatically archives this report.

File Expires

Use this field to enter, or use to select, the date when this report will be eligible for purging. If you leave this field blank, this report file does not expire.

Costpoint automatically populates this field if:

- The user who generated this report specified an expiration date in the Print Options dialog box or how long this report must stay archived before it is eligible for purging.
- An expiration age (how long this report must stay archived) is specified in the report archive category to which this report belongs. You can update archive category settings in the Manage Report Archive Categories screen.

Application

This field displays the identification code of the application that generated this report.

Application Name

This field displays the descriptive name for this **Application**.

Report

This field displays the identification code for this type of report.

Report Name

This field displays the descriptive name for this **Report**.

Report Category

This field displays the identification code for the report category to which this report belongs. You can assign report categories using the Manage Report Categories screen.

Report Category Name

This field displays the descriptive name for this **Report Category**.

Archive Category

This field displays the identification code for the archive category to which this report belongs. You can assign archive report categories using the Manage Archive Report Categories screen.

Archive Source

This field displays **User Archive** if this report was generated because the user selected the **Archive** check box in the Print Options dialog box. Otherwise, this field displays **System Archive**, which indicates that this report was archived because of a system setting (for example, when the **Archive** check box in the Configure User Preferences screen is selected).

Created By

This field displays the identification code of the user who generated and archived this report.

Created Date/Time

This field displays the date and time when this report was archived.

Modified By

This field displays the identification code of the user who updated this report.

Modified Date/time

This field displays the date and time when this report was updated.

Print Extensibility Unit Report

Use this screen to print available extensibility unit information and UI profile information associated with extensibility units. An extensibility unit is a logical collection of customized software components which includes business logic rule modifications and additions as well as screen customization modifications.

You can select a range of extensibility units and UI profiles to include in this report. If you select **UI Profile** in the **1st Sort** drop-down list, this report displays which extensibility units are assigned to a particular UI profile. For each extensibility unit, the applications that were customized are listed in this report.

You can select the **Show Warning for Potential Conflicts at the Application Level** to indicate potential conflicts by identifying customized applications that exist in more than one extensibility unit assigned to the same UI profile.

You must firs associate extensibility units with UI profiles using the Manage Extensibility Units or Manage User Interface Profiles screen before you can generate UI profile information on this report.

After entering your specifications and options, click to start printing the extensibility report.

- Administration
- System Administration
- System Administration Reports/Inquiries

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use the fields in this group box to specify the extensibility units and UI profiles you want to include on this report.

Extensibility Unit

Use this drop-down list to select the desired range of extensibility units you want to use. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.

- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Start

Use this field to enter, or use 🔍 to select, the starting extensibility unit ID, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending extensibility unit ID, as applicable.

UI Profile

Use this drop-down list to select the desired range of UI profiles you want to use. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Start

Use this field to enter, or use 🔍 to select, the starting UI profile ID, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending UI profile ID, as applicable.

Sort By

Use this group box to determine the primary sort, secondary sort, and page break settings.

1st Sort

Use this drop-down list to select whether to primarily sort this report by **UI Profile** or **Extensibility Unit**. Select the check box on the right to insert a page break between UI profiles or extensibility units.

2nd Sort

This field displays **Extensibility Unit** when you select **UI Profile** from the **1st Sort** drop-down list box. Otherwise, this field displays **Application** when you select **Extensibility Unit** from the **1st Sort** drop-down list box. Select the check box on the right to insert a page break between extensibility units or applications.

Options

Use the check box in this group box to specify additional options for this report.

Show Warning for Potential Conflicts at the Application Level

Select this check box to display a warning if a particular application is customized/extended through more than one extensibility unit assigned to the same UI Profile. Assigning multiple extensibility units to the same UI profile may potentially make functionality of different extensibility units interfere with each other if these extensibility units were not designed to work correctly with each other.

Table Information

Changes to this screen update the W_FUNC_PARM_CATLG table.

Print Menu Report

Use this screen to print the Costpoint menu information.

After entering your specifications and options, click to start printing the menu report.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use the fields in this group box to specify the modules you want to include on this report.

Module

Use the drop-down list box to select the desired range of modules you want to use. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.

- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Start

Use this field to enter, or use to select, the starting module ID, as applicable.

End

Use this field to enter, or use to select, the ending module ID, as applicable.

Non-Contiguous Ranges

Select this check box to include multiple module ranges. You must then specify the ranges you want to include in this report using the Module Non-Contiguous Ranges subtask. When you select this check box, Costpoint automatically sets the **Module** drop-down list box to **All**.

Sort by

Use the options in this group box to specify how to sort this report and whether, or not, to insert page breaks.

1st Sort

Use this drop-down list box to specify whether to sort this report by **Domain** or **Module**.

Page Break

Select this check box to insert page breaks between domains or modules.

Options

Use this group box to specify additional options in printing this report.

Include Domain

Use the check boxes in this group box to specify which Costpoint domains you want to include in this report. Domains are the first level classification for Costpoint functions.

Accounting

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the Accounting domain.

Projects

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the Projects domain.

Employee Management

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the Employee Management domain.

Materials Management

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the Materials domain.

System Controls

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the System Controls domain.

Administrative Tools

Select this check box to include all modules specified in the **Selection Ranges** group box that are under the Administrative Tools domain.

Menu Level to Show

Use the options in this group box to specify whether, or not, to include application information under each area of each module.

Module

Select this option to include menu information up to area level only on this report. Modules are divided into areas that group Costpoint applications that have similar functions.

Application

Select this option to include application information for each area of each module on this report.

Subtask

Subtask	Description
Module Non-Contiguous Ranges	Click this link to open the Module Non-Contiguous Ranges subtask and specify multiple module ranges you want to include on this report.

Print My Menu Report

Use this screen to generate a report that contains data about users' My Menu settings. My Menu settings are defined using the Default My Menu subtask of the Configure User Preferences screen.

After entering your specifications and options, click to start printing the My Menu report.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use the fields in this group box to specify the user and company information you want to include on this report.

User

Use the drop-down list box to select the desired range of user IDs you want to use. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Company

Use the drop-down list box to select the desired range of company IDs you want to use. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

Start

Use this field to enter, or use to select, the starting user or company ID, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending user or company ID, as applicable.

Sort by

Use the options in this group box to specify how to sort this report and whether, or not, to insert page breaks.

1st Sort

Use this drop-down list box to specify whether to sort this report by **User** or **Company**.

Page Break

Select this check box to insert page breaks between each user or company information.

View License Information

Use this screen to view Costpoint licensing information. Total active employee licenses are listed by company and licensed add-on modules are also listed on this screen.

Location

- Administration
- Security
- Security Reports/Inquiries

Enterprise Licenses

This block displays the number of employees licensed to use Costpoint.

Maximum Licensed Employees

This field displays the maximum number of employee licenses available.

Active Employees

This field displays the current number of active licenses.

Active Employees by Company

This table window displays all active employee licenses sorted by company.

Company

This field displays the identification code for this company.

Company Name

This field displays the descriptive name for this **Company**.

Employee Count

This field displays the number of active licenses within this company.

Licensed Add-On Modules

This field displays all available licensed add-ons for Costpoint.

Product Code

This field displays the identification code for this licensed add-on.

Product Name

This field displays the descriptive name for this **Product Code**.

Termination Date

This field displays the date on which the license for this add-on expires.

Table Information

Information on this screen derives from the following tables:

- EMPL
    - PROD_LICENSED

View Help About

Use this screen to view information about your Costpoint software installation. This screen can also be accessed by selecting **About Costpoint** from the **Help** menu.

General Information

This block displays a general overview of your Costpoint software.

Copyright Notice

This field displays your Costpoint's copyright information.

Costpoint Version

This field displays what version of Costpoint you are currently using.

System Hot Fix File

This field displays the most recent hot fix installed for your Costpoint software.

System

This field displays the database Costpoint is currently accessing.

Company

This field displays the company into which you are currently logged.

Validation Frequency

This field displays the validation frequency setting, which determines how often validation of values entered on Costpoint screens occur. This is specified when you login to Costpoint.

This field displays one of the following settings:

- **Field** — This setting indicates that data validation occurs each time you enter a value within a field.
- **Record** — This setting indicates that data validation occurs each time you save a record.
- **Application** — This setting indicates that data validation occurs each time you save your modifications on an application screen.

Deltek Website

This field displays the URL of Deltek's official website.

Subtask

Subtask	Description
Open Applications	Click this link to open the Open Applications subtask and view information about currently active Costpoint applications.
Transactional DB Patches	Click this link to open the Transactional DB Patches subtask and view a list of installed transactional database patches.
Administrative DB Patches	Click this link to open the Administrative DB Patches subtask and view a list of installed administrative database patches.
Metadata DB Patches	Click this link to open the Metadata DB Patches subtask and view a list of installed metadata database patches.
Customized Labels	Click this link to open the Customized Labels subtask and view a list of customized user interface labels.
Features	Click this link to open the Features subtask and view a list of features that are installed in Costpoint.

View Actions and Report Status

Use this screen to monitor the overall workload on the job server and view the status details of the jobs being processed. This screen is normally used by a system administrator, however, other users may also benefit from access to this screen since the application functionality enables status monitoring of each job submitted to the server, including reports, processes, and other jobs.

All data is on this screen is read-only, which can be filtered by application, starting and ending dates, job status, and execution method.

There are two versions of this screen:

- This screen (SYQJSTAT2) does not allow you to filter by user. The User field displays the logged-in user ID and is disabled. You can also access this screen by clicking Process » View Action and Report Status from the Global menu.
- The View Action and Reports Status screen (SYQJSTAT), located in the Job Management module, allows you to filter by user.

After specifying your options, click on the toolbar to display the data in the **Job Step Details** table window.

Location

- Administration
- Job Management
- Job Management Reports/Inquiries

User

This field displays the logged-in user ID and is disabled.

Application

Use this field to enter, or use to select, an application with which you want to filter the inquiry data.

Execution Method

Use this drop-down list box to select an execution method with which you want to filter the inquiry data. The following options are available:

- API
- Batch
- Batch API
- Scheduled Job
- Interactive

Starting Date

Use this field to enter, or use to select, a starting date with which you want to filter the inquiry data.

Ending Date

Use this field to enter, or use to select, an ending date with which you want to filter the inquiry data.

Job Status

Use this group box to further filter your inquiry by the status of the jobs submitted to the job server.

Scheduled

Select this check box to display all jobs that are have been submitted to the job server but will be processed at a specific date and time.

Active

Select this check box to display all jobs that are currently being processed by the job server and those that have not started.

Completed

Select this check box to display all jobs that have been processed successfully.

Failed

Select this check box to display all jobs that were not processed successfully due to an error.

Hold

Select this check box to display all scheduled jobs that have been postponed for a later date and time.

Suspended

Select this check box to display all active jobs that have been suspended.

Cancel Requested

Select this check box to display all scheduled jobs that are requested to be aborted.

User Cancelled

Select this check box to display all jobs that have been cancelled by a user.

Job Step Details

This table window displays the details of your inquiry based on your specifications in this screen. This table window populates when you click on the toolbar.

Application Name

This field displays the descriptive name of the application responsible for running this job step.

Report Name

If this application generates a report, this field displays the descriptive name for that report.

Action Name

If this application performs an action, this field displays the descriptive name for that action.

Submitting User

This field displays the user ID of the individual who submitted this job to the job server.

Company

This field displays the company ID with which the **Submitting User** is associated.

Execution Method

This field displays the execution method used by this application. The execution methods are:

- API
- Batch
- Batch API
- Scheduled Job
- Interactive

Priority

This field displays the priority level for this job step. The job server determines which jobs should be processed first based on this priority level.

Restartable

This field displays **Y** if this job step can be restarted. Otherwise, this field displays **N**.

Status

This field displays the current status of this job step. The status of a job step can be one of the following:

- **Scheduled** — This status indicates that a job has been submitted to the job server but will be processed at a specific date and time.
- **Active** — This status indicates that a job is currently being processed or waiting to be processed by the job server.
- **Completed** — This status indicates that a job has been processed successfully.
- **Failed** — This status indicates that a job was not processed successfully due to errors.
- **Hold** — This status indicates that a scheduled job has been postponed to an indefinite date and time.
- **Suspended** — This status indicates that a job has been suspended in the middle of processing.
- **Cancel Requested** — This indicates that a job has been requested to be cancelled.
- **User Cancelled** — This indicates that a job has been cancelled by a user.

Submitted Date/Time

This field displays the date and time on which this job step was submitted to the job server.

Detailed Status

This field displays more detailed information about the status of this job step.

Started Date/Time

This field displays the date and time on which this job step was started.

End Date/Time

This field displays the date and time on which this job step was processed successfully, aborted due to errors, or cancelled by a user.

Job Step

This field displays the sequence number of this job step within its associated job.

Percent Complete

This field displays the progress of this job step represented in percentage (%).

Cancelled By

This field displays the user ID of the individual who cancelled this job step.

Application Status 1

This field displays a detailed information about the application's progress in completing this job step.

Application Status 2

This field displays additional information about the application's progress in completing this job step.

Report Status

If this job step generates a report, this field displays a detailed information about the application's progress in generating this report.

Job

This field displays the job ID associated with this job step.

Job Name

This field displays the descriptive name for this **Job**.

Job Queue

This field displays the job queue ID to which this job was submitted.

Job Sequence

This field displays the sequence number of this job within the **Job Queue**.

Retry Status

This field displays information about the attempt to restart this job step. This only applies to jobs sent in batch mode.

Retry Period

This field displays the time (in minutes) to elapse before retrying the process or report. This only applies to jobs sent in batch mode.

Total Number of Retries

This field displays the number of times this job step has been restarted due to errors. This only applies to jobs sent in batch mode.

Previous Retry Attempts

This field displays the number of times the job server attempted to restart this job step. This only applies to jobs sent in batch mode.

Last Retry Date/Time

This field displays the date and time on which this job step was restarted. This only applies to jobs sent in batch mode.

Cancel Job

Click this button to abort the currently selected job step.

Subtask

Subtask	Description
Restartable Job Details	Click this link to open the Restartable Job Details subtask and view the job sequence, step type, description, and start and end date/time details for each restartable job that failed or was cancelled by the user.
Scheduled Job History	Click this link to open the Scheduled Job History subtask and view the status of all operations that are scheduled within the current job.

Table Information

Changes to this screen update the following tables:

- JOB
  - JOB_SCHEDULE_HIST
  - JOB_SCHEDULE_PARM
  - POST_SEMAPHORE
  - S_APP_LIST
  - S_RPT_LIST

System Administration Controls

Configure System Settings

This screen is divided into five independent information blocks with the first block consisting of two tabs. Use the fields in these blocks to set up basic settings and defaults for the entire system as well as some that affect company-specific settings.

Some of the settings in this screen are effective as company defaults; although some items can be overwritten on an individual user preferences basis (such as the Default Printer ID settings data in the Printer Defaults tab in the Manage Users screen). For convenience, you must set the system defaults in this screen and then make changes on an individual user basis as desired and where applicable.

Set up the settings and defaults in this screen for each company when you first initialize Costpoint or when you add a new company.

You can change your company of login by closing all open applications and using on the upper-right area of the screen.

Several fields in this screen have options to other data, so you must first set up the following screens before you can use this screen:

- Manage Report Fonts
- Manage Report Locales
- Manage Alternate File Locations

Location

- Administration
- System Administration
- System Administration Controls

Company Settings

Use this block to establish functional defaults as well as email notification preferences for this company. This block has two tabs:

- **Company Settings** — Use this tab to establish functional preferences as well as company and email system defaults.
- **Batch Job** — Use this tab to set default email addresses for both successful and unsuccessful batch job completions.

Default Web Settings

Use this block to establish default settings for reports. These settings include page size defaults, footer labels and text, company logo, footer data, and defaults for font, locale, and locale file location. This data is company-specific and effective for this company only.

User-specific data takes priority over company-specific data for all of the fields in this block except the **Print Currency Symbol** check box, **Footer Label** field, and **Footer Text** field. If you enter data for these fields in the Manage Users screen, Costpoint uses that data in place of the company default data entered here.

Default Page Size

Use the fields in this group box to establish page and margin defaults.

Page Size

Use this drop down box to select the default size for standard reports. The options are:

- None
- Letter
- A4
- Custom

If you select **Custom**, you must manually enter page height, width, and margin data.

Unit of Measure

Use this drop-down list box to select the default unit of measure. The options are:

- None
- Inches
- Millimeters

Page Height

If you selected **Custom** in the **Page Size** drop-down list box, use this field to enter the height of the default paper size based on the your selection in the **Unit of Measure** drop-down list box.

Page Width

If you selected **Custom** in the **Page Size** drop-down list box, use this field to enter the width of the default paper size based on the your selection in the **Unit of Measure** drop-down list box.

Top Margin

Use this field to enter the default size of the right margin based on your selection in the **Unit of Measure** drop-down list box.

Bottom Margin

Use this field to enter the default size of the bottom margin based on your selection in the **Unit of Measure** drop-down list box.

Left Margin

Use this field to enter the default size of the left margin based on your selection in the **Unit of Measure** drop-down list box.

Right Margin

Use this field to enter the default size of the right margin based on your selection in the **Unit of Measure** drop-down list box.

Default Font

Use this field to enter, or use to select, the default font to use for reports.

You must first establish fonts in the Manage Report Fonts screen before you can assign one for use as a default in this field.

Default Locale

Use this field to enter, or use to select, the default locale to use for reports for this company. The locale defines the format for numbers and dates. The unlabeled field to the right displays the descriptive name for this locale.

Report locales must first be established in the Manage Report Locales screen before you can assign one for use as a default in this field.

Print Currency Symbol

Select this check box to print currency symbols for most amounts displayed on reports for this company.

User-specific data DOES NOT take priority over company-specific data for this field.

Locale File Location

Use this field to enter, or use to select, the default locale file location to use for reports for this company in this field. The unlabeled field to the right displays the description for this locale file location.

Locale file locations must first be established in the Manage Alternate File Locations screen before you can assign one for use as a default in this field. The file location must also be linked to the user/user group using the Assigned Users/User Groups table window block in the Manage Alternate File Locations screen.

Company Logo

Use this field to enter, or use to select, the location of the default company logo graphic to display on reports for this company.

Logo file locations must first be established in the Manage Alternate File Locations screen before you can assign one for use as a default in this field. The file location must also be linked to the user/user group using the Assigned Users/User Groups table window block in the Manage Alternate File Locations screen.

Company logos must first be established in the Company Logos table window block in this screen before you can select one for use as a default in this screen.

Footer Label

Use this field to enter the default footer label which displays at the bottom of reports.

User-specific data DOES NOT take priority over company-specific data for this field.

Footer Text

Use this field to enter the default footer text which displays at the bottom of reports.

User-specific data DOES NOT take priority over company-specific data for this field.

Corporate Settings

Use this block to establish password life parameters to apply across all companies. Also use the system security check boxes in this block to activate verification of employee status at login and to activate the segregation of duties functionality.

Your entries in this block apply to all companies established in Costpoint. This number cannot be different or changed on a company-by-company basis.

Password Life

Use this field to enter the maximum number of days before users must change passwords. You can specify up to five numeric characters (entering all nines in this field would be the equivalent of 274 years). After the specified number of days has passed, a user cannot log into Costpoint without changing his password.

Disable Inactive Users Period (Days)

Use this field to enter the number of days since the last login date before a user becomes inactive in this field. Enter zero to turn off validation.

Password Complexity

Use the fields in this group box to strengthen the standard password rules. These options add additional restrictions to the standard password rules which are already enforced by Costpoint.

The following are standard password rules enforced by Costpoint:

- New passwords cannot be the same as the old password.
- New passwords must match their verification entry.
- Passwords can contain alphanumeric characters and all special characters on the keyboard (!,#,$,%,&,(,),*,+,-,<,=,>,?,@,[,],^,_,{,},~).
- If the **Allow Reusing of Passwords** check box is cleared on the Company Settings tab, the application will check the User Password History Table to determine if the password has already been used.
- The password must contain at least eight characters.
- The password must contain at least one alphanumeric character.
- The password cannot contain any of the following:
  - User's first name
  - User's last name
  - User's first and last name
  - User ID
  - Employee ID
  - The word "password"

Minimum Length

Use this field to enter the minimum character length (8-20) for a user's password on a system-wide basis.

Require Number

Select this check box to require at least one numeric character in the user's password on a system-wide basis.

Require Special Character

Select this check box to require at least one special character in the user's password on a system-wide basis.

Require Mixed Case

Select this check box to require at least one upper case and one lower case alphabetic character in the user's password on a system-wide basis.

Batch Job Retry Defaults

Number of Retries

Enter the desired number of retry attempts before the process or report fails. Enter zero to disable this feature.

Retry Period

Enter the number of minutes that you want to elapse before again trying to run the process or report.

Verify Employee Status at Login

Select the check box to have Costpoint verify that the linked employee ID is still active in the employee master.

If you select this check box, Costpoint compares the **Deactivation Date** on the Information tab of the Manager Users screen to the **Termination** date on the Employee Info tab of the Manage Employee Information screen. If the **Termination** date and the **Deactivation Date** are the same, the user can still enter Costpoint on that date. If the **Termination** date is later than the **Deactivation Date**, the user can no longer enter Costpoint.

Enforce Segregation of Duties Rules

Select this check box to have the system enforce segregation of duties rules. If you select this check box, Costpoint checks for conflicting rights set up in the Manage Users and Manage User Groups screens.

Enable Autocomplete

Select this check box to enable the autocomplete feature for fields that have options. Whenever you enter a value (e.g., user ID, buyer name, vendor address) in a field, autocomplete displays suggested values that you can select and use for that field. For example, when you enter 'Al' in a **User ID** field, autocomplete displays a list of user IDs that start with 'Al'. You can then select one of those suggested values for the **User ID** field.

Licensing Email ID

Use this field to enter the email ID that you want to use for issues related to Costpoint licensing.

URL

Use this field to enter the URL (Uniform Resource Locator) for the Web applications, which specifies the global address of documents and other resources on the World Wide Web. The first portion of the address indicates which protocol to use, and the second portion specifies the IP address or the domain name where the resource is located. This URL creates a link attached to Costpoint Web workflow email notifications.

Company Logos

Use this table window block to enter the file name, file description, and URL location information of your company logos. This data is company-specific and is effective for this company only.

You must first establish alternate file locations in the Manage Alternate File Locations screen before you can assign a location for each company logo. You must then copy the graphic files you want to use as logos in an alternate file location.

Use New to add a new entry to this table window.

Logo Name

Use this field to enter a descriptive name of this logo graphic.

Description

Use this field to enter descriptive information for this logo graphic.

Logo File Location

Use this field to enter, or use to select, the alternate file location of this logo graphic.

You must first establish alternate file locations in the Manage Alternate File Locations screen before you can assign the logo locations in this screen.

Logo File Name

Use this field to enter the file name of the logo graphic.

File Upload Limits

Use this table window block to review and edit file upload limits for a number of pre-loaded system file types as well as to add/edit user-defined file upload limits. This data is company-specific and effective for this company only.

Use New to add a new entry to this table window.

File Extension

This field displays pre-loaded and user-defined system file extension names. You cannot modify pre-loaded system file extension names.

When adding a new entry, use this field to enter the file extension name.

Description

Use this field to enter descriptive information for this file extension name.

Upload Rights

Use this drop-down box to select whether to **Allow** or **Deny** upload rights for files with this extension name.

Maximum Size (MB)

Use this field to enter the maximum upload size (in megabytes) permitted for files with this extension name.

Source

This field displays **System Files** if this file extension name is defined by Costpoint and **User Files** is user-defined.

Table Information

Changes to this screen update the following tables:

- SYS_SETTINGS
- SYS_SETTINGS_CORP
- W_SYS_LOGOS
- W_FILE_UPLOAD_CFG

Manage Locales

Use the table window in this screen to set up report locales, which specify how report data should be formatted regarding language, numbers, and date/time preferences.

Report locale ID data used throughout Costpoint is validated against your entries in this screen.

Although this field is not required, Costpoint provides a default report locale ID (**en_US**) for this screen (in the W_LOCALE table) and displays this default in the Configure System Settings screen. This locale is used as a company default unless you have specified a different locale in the Configure System Settings screen or you have overwritten the default on an individual user preference basis in the Manage Users screen (in the Printing Defaults tab). For convenience, you must set up the system defaults first and then make changes on an individual user basis as desired and where applicable.

Set up this screen during initialization before you enter data in the Configure System Settings and Manage Users screens. You can assign a default locale ID for the system in the Configure System Settings screen, and you can overwrite the system default locale ID with a default specific for the user in the Manage Users screen (in the Printing Defaults tab).

Use New to add a new entry to this table window.

Location

- Administration
- System Administration
- Printing

Report Locale ID

Use this field to enter a report locale ID. A good naming practice to follow is that used by ISO standards, such as **xx_YY**, in which **xx** is the language and **YY** is the country. (For example, **en_US**, **fr_FR**, etc.)

Costpoint provides a default report locale ID (**en_US**) for this screen (in the W_LOCALE table) and displays this default in the Configure System Settings screen.

Name

Use this field to enter a descriptive name for this **Report Locale ID**.

Language

Use this field to enter, or use to select, a language ID for this report locale.

Language Number

This field displays the language number associated with this **Language**.

Decimal Separator

Use this drop-down list box to select a decimal separator for numbers generated in reports. The options are as follows:

- Period
- Comma
- Space
- Single Quote

1000s Separator

Use this drop-down list box to select a thousands separator for numbers generated in reports. The options are as follows:

- Period
- Comma
- Space
- Single Quote

Numbers Example

This field displays a preview of the options you specified in the **Decimal Separator** and **1000s Separator** fields.

Date Separator

Use this drop-down list box to select the symbol you want to use as the separator for date components generated in reports. The options are as follows:

- Slash
- Dash
- Period
- Comma
- Colon
- Backslash

Date Order

Use this drop-down list box to select the order of the date components generated in reports. The options are as follows:

- Month/Day/Year
- Day/Month/Year
- Year/Month/Day

Date Example

This field displays a preview of the options you specified in the **Date Separator** and **Date Order** fields.

Hours Format

Use this drop-down list box to select the hours format for time components generated in reports. The options are as follows:

- 12-Hour
- 24-Hour

Time Separator

Use this drop-down list box to select the symbol to be used as the separator for time components generated in reports. The options are as follows:

- Slash
- Dash
- Period
- Comma
- Colon
- Backslash

AM Description

Use this field to enter an AM indicator for time components generated in reports. This field can be edited as desired.

PM Description

Use this field to enter a PM indicator for time components generated in reports. This field can be edited as desired.

Time Example

This field displays a preview of the options you specified in the **Hours Format**, **Time Separator**, **AM Description**, and **PM Description** fields.

Table Information

Changes to this screen update the following tables:

- W_LOCALE
- S_LANG_AVAIL

FAQ

How can I change or delete report locale data in this screen?

- You can change the data in the Name, Language, Decimal Separator, 1000s Separator, Date Separators, Date Order, Time Separator, AM Description, and PM Description fields in the Report Locales table window at any time.
- You cannot actually change the data in the Report Locale ID field in the Report Locales table window, since you must procedurally first delete the row with the unwanted ID and then add a new row with the desired ID.
- If a report locale ID from this screen is currently in use (that is, it has been used in other setup and data entry screens), it is considered dependent data and you cannot delete that ID from this screen.
- In order to delete it, you must first assign a different report locale ID in each applicable record throughout Costpoint in which that ID is used.
- After the report locale ID is no longer in use, you can delete the row from the table window.

You cannot delete the single pre-loaded report locale ID (en_US) automatically supplied for Costpoint.

Set Up Company

Use this screen to add new companies to a current Costpoint database. This screen gives you the flexibility to maintain multiple companies in the same database, even though these companies may have different functional currencies or different business rules from the parent company.

> Only one person at a time can use this screen.

Use this screen whenever you wish to add a new company to a current Costpoint database.

> Costpoint has multi-company functionality. See Using Multiple Companies for more information.

Location

- Administration
- System Administration
- System Administration Controls

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

General Information

Use this group box to establish general information about this company.

Company ID

Use this field to enter a company ID code for this new company. This company ID is associated with every transaction, organization, project, reference number, reorganization, employee, and product.

Name

Use this field to enter a descriptive name for this **Company ID**.

Company to Copy Settings From

Use this field to enter the company from which you want to copy the settings. The default value for this field is company **1**. The field to the right displays the descriptive name of the specified company.

Journal Edit Status

Use this group box to specify the time period in which transactions can be made.

Starting Fiscal Year

Use this field to enter, or use to select, the starting fiscal year for which you want to enter transactions.

Starting Period

Use this field to enter, or use to select, the starting period for which you want to enter transactions. You can have up to 18 accounting periods per fiscal year.

IWO Home Transfer Location ID

Use this field to enter the location ID of the IWO (Inter-Company Work Orders) home transfer for this company. The location is used to populate a row in the Manage Transfer Locations and Configure Project Settings screens.

This is a required field if you are licensed for either the Consolidations module or the Inter-Company Work Orders module.

- If you are licensed for the Consolidations module but not licensed for the Inter-Company Work Orders module, you can set up home transfer locations using the Manage Transfer Locations screen.
- If you are licensed for the Inter-Company Work Orders module but not licensed for the Consolidations module, you can set up home transfer locations in the Configure Transfer Locations screen.

Name

Use this field to enter a descriptive name of the IWO home transfer location. You must set up the IWO location of the parent company in the Manage IWO Allocations screen.

Functional Currency

Use this field to enter, or use to select, a functional currency for this company. This functional currency is used to prepare your company's financial statements and is also the currency used to maintain your general ledger.

Taxable Entity

Taxable Entity ID

Use this field to enter a taxable entity ID with which to associate this company.

You can have more than one taxable entity per company.

Name

Use this field to enter a descriptive name for this **Taxable Entity ID**.

Tax ID

Use this field to enter your company's Federal Employer Tax Identification Number, including the third-digit dash, for this company ID. This number will display on W-2s and 1099s.

Telephone

Use this field to enter the phone number for this taxable entity.

Address

Line 1

Use this field to enter the first line of the address of this taxable entity.

Line 2

Use this field to enter the second line of the address (if applicable) of this taxable entity.

Line 3

Use this field to enter the third line of the address (if applicable) of this taxable entity.

City

Use this field to enter the city for this taxable entity's address.

State/Province

Use this field to enter the state/province for this taxable entity's address.

Postal Code

Use this field to enter the postal code for this taxable entity's address.

Country

Use this field to enter the city for this taxable entity's address.

Table Information

Changes to this screen update the W_FUNC_PARM_CATLG.

Configure User Preference

Use the fields in this screen to change the user preferences set up by the system administrator in the Manage Users screen. During setup, system administrators can give each user permissions to change some of the data established for that user during setup. If allowed, a user can make changes to the setup preferences directly in this screen, including user name, default reporting and login companies, and password and telephone information.

Changes made to data in this screen are written back to the Manage Users screen. When you access this screen, Costpoint automatically displays the user's ID and the latest preferences.

Use this screen to change user preferences at any time. You must first establish user profiles in the Manage Users screen. For some of the fields in this screen, your system administrator must have enabled specific change permissions in the Manage Users screen.

Location

- Administration
- System Administration
- System Administration Controls

Identification

Use the field in this block to edit your user name.

User ID

This field displays your user ID. User IDs can be set up by your system administrator using the Manage Users screen.

User Name

Use this field to enter your desired user name. You can only change the data in this field if your system administrator has enabled your account to do so. If you have not been granted permission by your system administrator, an error message displays when you attempt to enter or change the data in this field.

System administrators can grant permission to change the user name in this screen by selecting the **Can Change Name** check box in the **Preferences User Can Change** group box (in the **Information** tab) in the **Manage Users** screen.

User Information

Use the fields in this group box to specify your company and telephone information, change/set your password, and set up report delivery options.

Default Information

Use the fields in this group box to specify company information. You can only change data in this group box if your system administrator has enabled your account to do so. If you have not been granted permission by your system administrator, an error message displays when you attempt to enter or change data in this group box.

System administrators can grant permission to change the user name in this screen by selecting the **Can Change Default Company** check box in the **Preferences User Can Change** group box (in the **Information** tab) in the **Manage Users** screen.

Reporting Company

Use this field to enter, or use to select, the name of your default reporting company.

Login Company

Use this field to enter, or use to select, the name of your default login company.

Password Information

Use the fields in this group box to change your password. You can only change your password if your system administrator has enabled your account to do so. If you have not been granted permission by your system administrator, an error message will display when you attempt to change your password.

> System administrators can grant permission to change the user name in this screen by selecting the **Can Change Password** check box in the **Preferences User Can Change** group box (in the **Information** tab) in the **Manage Users** screen.

You must click after entering your preferences to successfully change your password.

Old Password

Use this field to enter your current password. Asterisks display in this field instead of the entered characters.

New Password

Use this field to enter your new password. Asterisks display in this field instead of the entered characters.

Verification

Use this field to re-enter your new password exactly as you entered it in the **New Password** field for verification. Asterisks display in this field instead of the entered characters.

Default Report Delivery Options

Use the options in this group box to select report delivery options. You can only select options that your system administrator has enabled in the Printing Defaults tab of the Manage Users screen.

System Printer

Select this check box to print reports using a system printer by default.

Download

Select this check box to download reports by default.

Archive

Select this check box to archive reports by default.

Print to File

Select this check box to save reports to a file by default.

Email

Select this check box to have reports directed to an email recipient by default.

Local Printer

Select this check box to have reports directed to a local printer by default. This option is disabled if the **Local Printer/Download** option in the Printing Defaults tab of the Manage Users screen is cleared.

Phone

Use the options in this group box to change your telephone number. You can only change your telephone number if your system administrator has enabled your account to do so. If you have not been granted permission by your system administrator, an error message displays when you attempt to change your password.

System administrators can grant permission to change your telephone number in this screen by selecting the **Can Change Phone and Extension** check box in the **Preferences User Can Change** group box (in the **Information** tab) in the **Manage Users** screen.

Phone

Use this field to enter your telephone number.

Extension

Use this field to enter your telephone extension number.

Locale

Use this group box to specify default locale information.

Locale ID

Use this field to enter, or use 🔍 to select, the default locale for this user. The descriptive name of the locale displays in the adjacent field.

Notify When Batch Job Is completed

Select this check box if your email address is entered in the Workflow tab and the **Notify When Batch Process/Report Is Completed** check box is selected in the Information tab of the Manage Users screen.

Enable Autocomplete

Select this check box to enable the autocomplete feature for fields that have 🔍 options. Whenever you enter a value (e.g., user ID, buyer name, vendor address) in a field, autocomplete displays suggested values that you can select and use for that field. For example, when you enter 'Al' in a **User ID** field, autocomplete displays a list of user IDs that start with 'Al'. You can then select one of those suggested values for the **User ID** field.

Use AutoPosition mode

Use this drop-down list to select how application screens are displayed on your computer monitor. The following options are:

- **Default** — Select this option to use the system-wide default mode specified on the Configure System Settings screen.
- **Yes** — Select this option to adjust the layout of application screens to your current browser and monitor settings.
- **No** — Select this option to display application screens in their default layout.

Subtasks

Subtask	Description
Change Default Period	Click this link to open the Change Default Period subtask and modify the default period you want to use.
UI Profiles	Click this link to open the UI Profiles subtask and view user interface profiles available that are available for use.

CHANGE DEFAULT PERIOD

Use this subtask to change the default period for this user.

Module

Use this field to enter, or use to select, the module to use as the default for this company.

Fiscal Year

Use this field to enter, or use to select, the fiscal year to use as the default for this module.

Period

Use this field to enter, or use to select, the period to use as the default for this module.

Subperiod

Use the field to enter, or use to select, the subperiod to use as the default for this module.

OK

Click this button to save your preferences and close this subtask.

My Menu Application List

This table window displays a list of all the Costpoint applications from which you can select those that you want to include on My Menu, which is found at the upper-left portion of your screen ( ). The fields in this table window display all of the pertinent information for each application and their location within Costpoint.

To select applications to include on My Menu, select the application on this list of all Costpoint applications, and then click **Select**. The selected application is then moved to the **My Menu** table window to verify that it is now included on My Menu.

Application

This field displays the ID code of this application.

Name

This field displays the descriptive name of this **Application**.

Domain

This field displays the domain where this application is located. Costpoint is broken down into six domains where applications that perform one general function are grouped together by module and then by area of function. The domains are:

- Accounting
- Projects
- Employee Management
- Materials Management
- System Controls
- Administrative Tools

Module

This field displays the ID of the module where this application is located. Costpoint domains are broken down into modules where related applications are grouped together by their area of function.

Module Name

This field displays the descriptive name of this **Module**.

Area

This field displays this application's area of function.

My Menu

My Menu allows you to access shortcuts to the applications you frequently use without navigating through the entire Costpoint menu. Use this table window to set up a list of those applications. You can access My Menu by clicking on the upper-left portion of your screen.

Click New to add a new entry to this table window, or select an application from the **My Menu Application List** table window and click **Select** to add that application to My Menu.

Sequence

Use this field to enter sequence numbers to determine the order of the menu items displayed on My Menu. Use this field to arrange or rearrange the order in which applications and headers displays on My Menu.

Line Type

Use this drop down list box to select whether this entry is an **Application** or **Header**.

If you select **Application**, you must then enter a descriptive title to identify this application in the **My Menu Title** field and specify the application ID in the **Application** field. If you used the **My Menu Application List** table window to select an application, this field automatically selects **Application** as the line type and Costpoint automatically populates the rest of the fields.

If you select **Header**, you must then enter a descriptive name for this group header. This group header acts as an expandable/collapsible separator for your application groupings.

My Menu Title

Use this field to enter a descriptive title to identify this application or group header. This title is what displays on My Menu. If you used the **My Menu Application List** table window to select an application, Costpoint automatically populates this field.

Application

Use this field to enter, or use to select, the ID code of the application you want to include on My Menu. If you used the **My Menu Application List** table window to select an application, Costpoint automatically populates this field.

Application Name

This field displays the name of the selected application.

Subtasks

Subtask	Description
Default My Menu	Click this link to open the Default My Menu subtask and append or replace the default My Menu settings.

DEFAULT MY MENU

Use this subtask to append or replace the current My Menu setting with the default My Menu settings.

UI Profile ID

This field displays the UI profile ID associated with the current My Menu settings.

Name

This field displays the descriptive name for this **UI Profile ID**.

Table Window

Use this table window to view My Menu items you can append or replace.

My Menu Title

This field displays the descriptive title which identifies the application or group header in My Menu.

Application

This field displays the application ID associated with this **My Menu Title**.

Application Name

This field displays the descriptive name for this **Application** ID.

Append

Click this button to append the highlighted rows from the default My Menu to the current My Menu.

Replace

Click this button to replace the highlighted rows from the current My Menu with the default My Menu.

Table Information

Changes to this screen update the following tables:

- W_UI_PROF_MYMENU
- USER_MODULE_DFLT
- W_MYMENU
- S_MENU_APPS
- W_USER_UGRP_LIST

System Administration Utilities

Activate/Inactivate Costpoint Usage

In order to diagnose problems, the Costpoint system administrator may sometimes want to keep all regular Costpoint users from using Costpoint. Use this screen to enable or disable Costpoint logins.

If you disable logins from this screen, you must stay logged into Costpoint in order to re-enable them. If you log out of Costpoint without re-enabling logins, you must login as CPSUPERUSER, navigate to this screen and clear the Logins Disabled check box.

Use this function when you need to keep all users out of Costpoint.

Location

- Administration
- System Administration
- System Administration Utilities

Logins Disabled

Select this check box to temporarily prevent users from logging into Costpoint.

Reason

Use this field to enter the reason logins are disabled. This reason will be displayed to users who try to log in while logins are disabled.

Table Information

Changes to this screen update the MULTI_USER_CNTL table.

Clear Users

Use this screen to clear the Costpoint Seat Assignment table of user and station assignment combinations for sessions that are no longer active. User ID/station number combinations are not removed from this table if a user exits Costpoint without closing all open functions (for example, by rebooting the workstation while a Costpoint function is still active).

When the screen first appears, it shows the user and station number for all sessions recorded as currently active. After confirming that a listed session is no longer active, you can remove it from the table by marking the row for deletion (highlight the row by clicking on it and then click Delete). When you click on the toolbar, all the rows marked for deletion are removed.

Include this utility as part of your system administration maintenance procedures because there is a high probability that users will leave Costpoint without going through the normal exit procedure.

Locked Applications

This table window displays all applications locked to a user who is logged into Costpoint. Use this table window to unlock applications that are no longer active.

User

This field displays the identification code of the user who logged into Costpoint.

User Name

This field displays the name of the **User**.

Application Locked

This field displays the application that is locked by this user.

Station Number

This field displays the internal number assigned by Costpoint to this user.

Date Logged In

This field displays the date the user started this session of Costpoint.

Time Logged In

This field displays the time the user started this session of Costpoint.

Phone

This field displays the user's phone number.

Extension

This field displays the user's phone extension.

Screen Title

This field displays the screen title for this **Locked Application**.

Module

This field displays the module where this **Locked Application** is located.

Rebuild Global Settings

Use this screen to synchronize the settings control screens. You can run this process for all settings screens at one time if you choose. Costpoint automatically performs an initial synchronization of the database settings when applications are initialized.

Under normal circumstances, only your system administrator has rights to access this utility.

After entering your preferences, click on the toolbar to start the reloading global settings.

Location

- Administration
- System Administration
- System Administration Utilities

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Select Process

Use the options in this group box to choose whether to update all screens/functions at one time or to update only selected screens.

All Settings

Select this option to update all screens/functions at the same time. If you select this option, the individual check boxes in the **Individual Settings** group box and **System Settings** group box are disabled.

Individual Setting(s)

Select this option to update screens/functions selected in the **Individual Settings** and **System Settings** group boxes.

Individual Settings

Use the check boxes in this group box to select one or more settings screens on which to perform the synchronization. To use the check boxes in this group box, you must first select the **Individual Setting(s**) option in the **Select Process** group box.

Accounts Payable

Select this check box to synchronize the Configure Accounts Payable Settings screen.

Accounts Receivable

Select this check box to synchronize the Configure Accounts Receivable Settings screen.

Application Org Security

Select this check box to synchronize the Activate/Inactivate Organization Security by Module screen.

Autocreate (Fixed Assets)

Select this check box to synchronize the Configure Autocreation Settings screen.

Billing

Select this check box to synchronize the Configure Billing Settings screen.

Billing - EDI

Select this check box to synchronize the Configure Billing EDI Settings screen.

Cobra Interface

Select this check box to synchronize the Configure Cobra Interface Settings screen.

Compensation

Select this check box to synchronize the Configure Compensation Settings screen.

Consolidations

Select this check box to synchronize the Configure Consolidations Settings screen.

Currency

Select this check box to synchronize the Manage Currencies screen.

Engineering Change Notices

Select this check box to synchronize the Configure Engineering Change Notice Settings screen.

Employee Self Service

Select this check box to synchronize the Configure ESS Global Settings and Manage ESS Company Settings screens.

Fiscal Years

Select this check box to synchronize the Manage Fiscal Years screen.

Fixed Assets

Select this check box to synchronize the Configure Fixed Assets Settings screen.

GL Configuration

Select this check box to synchronize the Configure General Ledger Settings screen.

GL Structure

Select this check box to synchronize the Corporate Settings subtask in the Configure General Ledger Settings screen.

HR - Affirmative Action

Select this check box to synchronize the Configure Affirmative Action Settings screen.

HR - Benefits

Select this check box to synchronize the Configure Benefit Settings screen.

HR - Personnel Admin

Select this check box to synchronize the Configure Personnel Settings screen.

Inventory

Select this check box to synchronize the Configure Inventory Settings screen.

Item

Select this check box to synchronize the Configure Product Definition Settings screen.

Labor

Select this check box to synchronize the Configure Labor Settings screen.

Master Production Scheduling

Select this check box to synchronize the Configure Master Production Scheduling Settings screen.

Materials Estimating

Select this check box to synchronize the Configure Materials Estimating Settings screen.

Material Requirements Planning

Select this check box to synchronize the Configure Materials Requirements Planning Settings screen.

Multi-Currency

Select this check box to synchronize the Configure Multicurrency Settings screen.

Multi-User Control

Select this check box to synchronize the Activate/Inactivate Costpoint Usage screen.

Order Entry

Select this check box to synchronize the Configure Sales Order Entry Settings screen.

Overtime

Select this check box to synchronize the Configure Weighted Average Overtime Settings screen.

Payroll

Select this check box to synchronize the Configure Payroll Settings screen.

Production Control

Select this check box to synchronize the Configure Production Controls Settings screen.

Project

Select this check box to synchronize the Configure Project Settings screen.

Purchase Order

Select this check box to synchronize the Configure Purchasing Settings screen.

Receiving

Select this check box to synchronize the Configure Receiving Settings screen.

Requisition

Select this check box to synchronize the Configure Purchase Requisition Settings screen.

RFQs

Select this check box to synchronize the Configure Vendor Quote Settings screen.

Routings

Select this check box to synchronize the Configure Routing Settings screen.

System

Select this check box to synchronize the Configure System Settings screen.

Vendor

Select this check box to synchronize the Configure Vendor Settings screen.

Voucher

Select this check box to synchronize the Configure Accounts Payable Vouchers Settings and Configure Purchase Order Voucher Settings screens.

System Settings

Use the check boxes in this group box to individually select one or more function screens on which to perform the synchronization. To use the check boxes in this group box, you must first select the **Individual Setting(s**) option in the **Select Process** group box.

License

Select this check box to synchronize changes made to licenses.

Product Licenses

Select this check box to synchronize changes made to product licenses. This also rebuilds menus for all users.

Log Files

Select this check box to synchronize changes made to log files.

Table Information

Changes to this screen update the W_FUNC_PARM_CATLG table.

Resize Dynamic Tables and Indexes

Use this utility to identify the database tablespace (Oracle) or filegroup (SQL Server) to use when creating dynamic temporary tables in some of the reports, processes, and postings. A tablespace/filegroup must already exist in the database before specifying it here.

- If there are no entries on this screen, dynamic tables and indexes will use the default settings established by the database vendor.
- If a tablespace/filegroup is specified for a given dynamic table or index, Costpoint will use that specified tablespace/filegroup.

- For all other dynamic tables or indexes not specified in this table, Costpoint will use the first tablespace/filegroup it finds in this table. This will significantly reduce data entry on this screen for customers who want to use the same tablespace/filegroup for all dynamic tables and indexes. (Only one dynamic table and one dynamic index is required on this screen.)

For more information on dynamic temporary tables, see Application Locking/Dynamic Tables, and refer to the manuals provided by your database vendor for details about the tablespace/filegroup of your database.

The tablespace/filegroup is used every time the object (that is, the dynamic table and/or index) is created because they become part of the Create Table SQL command.

Location

- Administration
- System Administration
- System Administration Utilities

Object Name

Use this field to enter the name of the dynamic table or index that is to be fine-tuned.

Object Type

Use this field to enter T if the object is a table or I if the object is an index.

Tablespace/Filegroup

Use this field to enter the filegroup to which this object is assigned.

The System Administrator should restrict access to this application to the Database Administrator.

Your database administrator must use this function whenever there is a need to fine-tune the database.

Table Information

Changes to this screen update the DYNAMIC_OBJ_SIZING table.

Content Management

Manage Content Types

Use this application to specify the types of electronic content (typically documents) that can be linked from a third-party Content Management System (CMS) to a specific Costpoint data record. After defining a content type, you can use the Manage Application/Content Links screen to link it to one or more Costpoint applications. For example, you could link a scanned PDF of a vendor invoice to the Costpoint accounts payable voucher record it was used to generate. You could also link other content, such as engineering drawings or video work instructions, to an assembly part or routing record in Costpoint.

You can specify which CMS holds the content and where the content can be found in the CMS. If content for a particular content type is stored completely in one CMS location and no user or user group access rights are defined, the CMS information that you enter here is the sole source of content files for this content type. If you store files for this content type in multiple CMS locations (that is, a different CMS, repository, content type and/or base folder) or if you assign rights to view and link the content files, the CMS values in this screen serve only as defaults for the CMS Locations subtask.

Before you use this screen, you must use the Costpoint Configuration utility to configure the Costpoint connection to the CMS. For more information, see the *Deltek Costpoint Web 7.0 Configuration Utility* document included with this release.

Location

- Administration
- System Administration
- Content Management

Identification

Use this group box to specify you want to create a content type.

If you use Query to search for a single content type, this group box displays that content type's identification code and description.

If you use Query to search for multiple content types, block displays in table view.

Content Type ID

Use this field to enter a unique ID for this content type.

Description

Use this field to enter a description of the content type.

Content Management System

All specified content locations must include all the CMS content property fields included in the content data fields. They must also share the same data type and **Queryable** value.

CMS ID

Use this field to enter, or use to select, the ID of the CMS from which this content is accessed. An ID must be configured for use in Costpoint before you can enter it here. Clicking displays the **CMS ID** and **CMS Name** from the connection created by the Costpoint Configuration utility.

For more information about using the utility, see the *Deltek Costpoint Web 7.0 Configuration Utility* document included with this release.

The untitled field to the right displays the CMS name.

You cannot modify a CMS ID if content files from the system are already linked to a Costpoint record.

Repository Name

Use this field to enter, or use to select, the name of the CMS repository from which this content is accessed. Clicking displays the list of available repositories from the CMS.

You cannot modify the repository name if content files from the CMS are already linked to a Costpoint record.

Content Type Name

Use this field to enter, or use to select, the name of the CMS content type that is used as the source for this Costpoint content type.

You cannot modify the content type name if content files from the CMS are already linked to a Costpoint record.

Base Folder

Use this field to enter, or use to select, the CMS folder that is used as the top-level location for content of this type. Clicking displays a list of folders in the entered repository for the selected CMS.

Attachment Property

Use this field to enter, or use to select, the CMS content type property used to identify if content is linked to a Costpoint record. Only text fields can be used. This attachment property must be marked as **Queryable** and **Editable** in the CMS.

When you link content to a Costpoint record, this CMS property value is changed to **Y** (Yes) to indicate that content is linked.

Clicking displays a list of properties names and their associated data types linked to CMS and the CMS content type

Show Only Unattached Content Files in Default Lookup

Select this check box to exclude files from the initial content Lookup that are already linked to a Costpoint record. You can manually change the content selection criteria by using the Lookup Query function. This check box is cleared by default for new records. This check box can be overridden.

This field is disabled if the **Attachment Property** field is blank.

Can be Populated from Costpoint

Select this check box if a report or export file generated from Costpoint and saved to an alternate file location can be stored in the CMS for this content type. This check box is cleared by default for new records.

To learn how to save a report file or an export file to the CMS, click here.

Allow Content File to Be Linked to More Than One Costpoint Record

Select this check box if a content file can be linked to more than one Costpoint record. This check box is cleared by default for new records.

Apply User/User Group Access Rights

If you select this check box, a user or user group's access rights determine whether a user can view or update content file links. You can set up user or user group access rights in the Assigned Users/User Groups subtask of the CMS Locations subtask. This check box is cleared by default for new records.

Autoload CMS Document Properties

Click this button to load all the document property fields for the specified CMS content type. If you click this button, a new row is generated on the Content Data Fields subtask for each property field for the specified CMS/CMS **Content Type ID**. The fields populated from this autoload include **CMS Content Property**, **Data Type**, **Length**, and **Queryable**. This action generates the **Content Data Field ID** from the **CMS Content Property Name**. If the property is not marked as editable in the CMS, the **Editable** check box is cleared and disabled.

This button is enabled only if the Content Data Fields subtask is empty.

Subtasks

Subtask	Description
Content Data Fields	Click this link to open the Content Data Fields subtask, where you can define your content data fields.
CMS Locations	Click this link to open the CMS Locations subtask, where you can store one or more CMS locations.
Linked Content Files	Click this link to open the Linked Content Files subtask, where you can view and maintain content files linked to the currently selected content type.

CONTENT DATA FIELDS

Use this subtask to define your content data fields.

If this subtask is empty, you can click the **Autoload CMS Document Properties** button on the main screen to load all the document property fields for the specified CMS content type. A new row is generated for each property field for the specified CMS/CMS **Content Type ID**. The fields populated from this autoload include **CMS Content Property**, **Data Type**, **Length**, and **Queryable**. This action generates the C**ontent Data Field ID** from the **CMS Content Property Name**. If the property is not marked as editable in the CMS, the **Editable** check box is cleared and disabled.

Content Data Field ID

Enter a unique ID for the content data field.

If you created this row by clicking the **Autoload CMS Document Properties** button, this field is generated from the **CMS Content Property**.

Content Type Field Description

Enter a description of the content data field.

CMS Content Property

Enter, or use to select, the CMS content property field to which this field is linked.

Clicking displays a list of property names and their associated data types linked to the CMS, repository, and the CMS content type table/column.

If you created this row by clicking the **Autoload CMS Document Properties** button, this field was populated from the CMS. The CMS may not allow modifications to this field.

This field is not required. There are situations where the Content Data Field is needed as a key field in the Manage Application/Content Links screen, but corresponding the CMS property does not exist.

Lookup Position

To display this property in the content file , select the number indicating which column the property appears in. Valid options are **1 - 7**.

These columns display when you use from the Linked Content Files screen.

For information about the Linked Content Files screen, see the *Deltek Costpoint 7.0 Getting Started Guide* included with this release.

Data Type

Select the type of data that must be entered for this field. Valid options are:

- Text
- Number
- Date

If you created this row by clicking the **Autoload CMS Document Properties** button, this field was populated from the CMS.

Length

Enter the maximum number of characters that can be entered for this text field. If the **Data Type** field is **Date** or **Number**, leave this field blank.

If you created this row by clicking the **Autoload CMS Document Properties** button, this field was populated from the CMS.

Queryable

This non-editable field displays **Y** (Yes) or **N** (No) to indicate whether this field can be queried in CMS.

Viewable

Select this check box to display the contents of this field when displaying information on this content item. This check box is selected by default.

Editable

Select this check box to allow users to modify the content item's values. This check box is cleared by default. If the property is not marked as editable in the CMS, the **Editable** check box is cleared and disabled.

If you created this row by clicking the **Autoload CMS Document Properties** button, this field was populated from the CMS.

CMS LOCATIONS

Use this subtask to specify one or more CMS locations (a combination of CMS, repository, content type, and base folder). This subtask enables you to access multiple CMS locations for a given Costpoint content type. If you want to assign user/user group access rights (that is, rights assigned by CMS location), you must fill in one or more rows on this subtask. The original CMS/Repository from the main screen must be included.

All specified content locations must include all the CMS content property fields designated on the Content Data Fields subtask. They must also share the same **Data Type** and **Queryable** value.

You cannot delete or modify a record that has content files that are linked to Costpoint records.

CMS Location ID

Enter a unique name to identify this CMS, repository, and folder.

CMS ID

The **CMS ID** from the main screen defaults into this field for new rows. Enter, or use to select, the ID of the CMS from which this content is accessed. Clicking displays the **CMSEndpoint** and **Endpoint Name** from the enterprise.properties file created by the Costpoint Configuration utility.

For more information about using the utility, see the Deltek Costpoint 7.0 Configuration Utility document included with this release.

CMS Name

This non-editable field displays the CMS name from the enterprise.properties file.

CMS Repository Name

The **Repository Name** from the main screen defaults into this field for new rows. Enter, or use to select, the name of the CMS repository from which this content is accessed.

CMS Content Type Name

The **Content Type Name** from the main screen defaults into this field for new rows. Enter, or use to select, the name of the CMS content type that is used as the source for the Costpoint content type.

CMS Base Folder

The **Base Folder** from the main screen defaults into this field for new rows. Enter, or use to select, the CMS folder that is used as the top-level location for content of this type. Clicking displays a list of folders in the entered repository for the selected CMS.

Subtasks

Subtask	Description
Assigned Users/User Groups	Click this link to open the Assigned Users/User Groups subtask and link the profile to existing users and user groups. This subtask is enabled only if the Apply User/User Group Access Rights check box is selected on the main screen.

Table Information

Changes to this screen update the following tables:

- CMI_CONTENT_TYPE
- CMI_CONT_TYPE_FLD
- CMI_CONT_TYPE_LOC
- CMI_CONT_TYPE_USER

Manage Application/Content Links Screen

Use this screen to specify which types of content can be linked to a specific Costpoint application and result set. After defining a content type in the Manage Content Types screen, use this screen to link that content type to one or more Costpoint applications. For example, you could create a content type called

Vendor Invoice in the Manage Content Types screen and then use this application to link a vendor invoice to records in screens such as Manage Accounts Payable Vouchers.

You can also use this screen to determine how the CMS content object is linked to the Costpoint record. You define a linking rule by mapping a Costpoint application and result set to a specific content type. You must identify the key fields of the result set and match (link) them to corresponding content type data fields.

You can specify other non-key Costpoint database fields in the result set and link them to the Content Type data fields. This can simplify Costpoint data entry. For example, you could scan a vendor invoice into your CMS and add content properties. Later, you could go into Costpoint to create a voucher. Instead of manually entering the data into the Costpoint fields, you could copy the data from CMS directly into Costpoint.

You can also specify rules on how content properties can be modified from within Costpoint and how many links can be made for a given content type/Costpoint record. Users can perform these actions on the Linked Content Files screen, available from applications by clicking .

Location

- Administration
- System Administration
- Content Management

Identification

Application

Enter, or use to select, the ID of the Costpoint application to which you want the content linked. The non-editable field to the right displays the application name.

Result Set

Enter, or use to select, the ID of the Costpoint application result set to which you want the content linked. The available result sets depend on your selection in the **Application** field. The non-editable field to the right displays the application result set name.

Content Type

Enter, or use to select, the ID of the content type to which you want the content linked. In some cases, no content types may be available. The non-editable field to the right displays the content type name.

Allow New Content Links in this Application/Result Set

Select this check box to allow users to add links to content objects of this type in this application/result set.

Allow Content Link Deletions in this Application/Result Set

Select this check box to allow users to delete links to existing content objects of this type in this application/result set.

Allow Updates to Content Property Fields in this Application/Result Set

Select this check box to allow users to update content properties for existing content of this type in this application/result set.

Allow Costpoint Record to be Linked to More than One Content File with this Content Type

Select this check box to allow a Costpoint record to be linked to more than one content file with this content type.

Costpoint/Content Property Mismatch Validation

Use this group box to determine what kind of messages display when a user links content where the CMS properties and Costpoint data do not match.

Do Not Validate

If you select this option, Costpoint displays no message if the CMS properties and Costpoint data do not match.

Give Warning

If you select this option, Costpoint displays a warning if the CMS properties and Costpoint data do not match.

Give Error

If you select this option, Costpoint displays an error if the CMS properties and Costpoint data do not match. You cannot save non-matching links.

Autoload Content Type Data Fields

Click this button to generate new rows in the **Content Data Fields** table for each record in the CMI_CONT_TYPE_FLD table for the specified content type. The rows are considered new for validation purposes. You must enter a **Content Type** in the **Identification** block before you can use this button. You cannot click this button if content data field rows already exist.

Autoload Costpoint Screen Objects

Click this button to generate new rows in the **Content Data Fields** table for each Costpoint screen object field for the specified result set (it pulls these fields from the result set metadata, S_RS_DESC). You must fill in the **Content Data Field** to save a given record. You cannot click this button if content data field rows already exist.

Content Data Fields

Use this table window to define content type data fields that are linked to the specified application/result set fields.

At least one row in this table must have the **Use to Link Content to Costpoint Records** check box selected. Fields with this check box selected are used to uniquely identify the link. The application stores combined values for the fields as a key identifier for the linked content file.

Content Data Field

Enter, or use to select, the content data field.

Content Type Field Description

This non-editable field displays the content data field description.

Content Data Field Editable

Select this check box to allow users to manually edit this field's values in the specified Costpoint application/result set for a linked content object.

Use to Link Content to Costpoint Records

Select this check box to use the value in this content data field to link the content to the Costpoint record. Fields with this check box selected are used as a link key. Usually, primary keys for the result set are the best candidates for the link keys, but sometimes a business object key is different. When selecting a key fields, you must make sure that combination of key values is unique in the result set.

The same content type (such as a voucher) can be linked to different applications (such as Manage Accounts Payable Vouchers). In order for links created in one application/result set to be visible in the other, the key fields definition must be the same (that is, exactly the same fields must have this check box selected).

Costpoint Screen Object

Enter, or use to select, the Costpoint screen object to which you want to link.

CMS Content Property

This non-editable field displays the CMS content property.

Content Data Field Type

This non-editable field displays the data field type. Valid entries are:

- Text
- Number
- Date

Content Data Field Length

This non-editable field displays the length of the content data field.

Content Data Field Viewable

This non-editable field displays **Y** (Yes) or **N** (No) to indicate whether you can view the contents of this field when displaying information for this content item.

Queryable

This non-editable field displays **Y** (Yes) or **N** (No) to indicate whether this field can be queried in the CMS.

Costpoint Screen Label

This non-editable field displays the Costpoint screen label for this data field.

Costpoint Column

This non-editable field displays the Costpoint database column ID for this data field.

Costpoint Column Description

This non-editable field displays the column description.

Costpoint Table

This non-editable field displays the Costpoint database table for this data field.

Costpoint Table Description

This non-editable field displays the Costpoint table description.

Costpoint Primary Key

This non-editable field displays **Y** (Yes) or **N** (No) to indicate whether this data field is a primary key in the Costpoint database.

Costpoint Data Type

This non-editable field displays this field's data type. Valid entries are:

- Text

- Number
- Date

Costpoint Length

This non-editable field displays the length of this data field.

Table Information

Changes to this screen update the following tables:

- CMI_CONTENT_LINK
- CMI_CONT_LINK_FLD

System Security

Manage User Groups

Use this screen to set up user groups for Costpoint and to establish module/application/result set security rights for user groups within the Costpoint screens. This screen contains a table window for user group ID and name data together with three subtasks.

Companies frequently restrict access to these screens to Costpoint administrators.

You must establish at least one user group for each company before you can create any user ID in the Enter/Manage Users screen.

If you plan to optionally assign a user group to a user, you must set up the user group first. You may find, however, that the most efficient way to set up security rights for users is to first establish rights for user groups. Then, if necessary, you can use the Module Rights and other drill-down subtasks from the Enter/Manage Users screen to override group rights for a specific user at the module, application, result set, or action/report rights by result set levels, as desired.

You can assign users to user groups in this screen or using the Manage Users screen.

You must establish user information using the Manage Users screen before you assign users to a user group on this screen.

Click on the toolbar to save any changes you make in this screen.

Location

- Administration
- Security
- System Security

User Groups

Use this table window to add new user group IDs and names or to edit the user group name for existing user group IDs. This table window displays all existing user groups within Costpoint.

To create a new user group, click New to add a new row to this table window. You can then use the fields in this row and the subtasks to specify your user group settings.

User Group ID

This column displays all existing user group IDs.

When creating a new user group, use this field to enter an identification code for this user group.

Name

This column displays the corresponding descriptive names for the user group IDs in the **User Group ID** column.

When creating a new user group, use this field to enter a descriptive name for the data you entered in the **User Group ID** field.

Subtasks

Subtask	Description
Assign Users to Group	Click this link to open the Assign Users to Group subtask and link one or more users to the currently selected user group.
Module Rights	Click this link to open the Module Rights subtask and assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint modules to the currently selected user group.
Application Rights	Click this link to open the Application Rights subtask and assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint applications within a module to the currently selected user group.
UI Profiles	Click this link to open the UI Profiles subtask and assign use interface profiles to the currently selected user group.

Assign Users to Group

Use this subtask to assign users to a user group.

Table Window

This table window lists the users currently assigned to the selected user group in the Manage User Groups screen.

To assign a new user to this user group, click New to add a new line to the table window. You can then use the **User** or **Name** field to specify the user ID or user name you want to assign to the user group.

User

This field displays the identification code of the user assigned to this user group.

When adding a new user, use this field to enter, or use to select, the user ID you want to assign to this user group. Alternatively, you can use the **Name** field to enter or search for the descriptive name of the user.

Name

This field displays the descriptive name for this **User** ID.

When adding a new user, use this field to enter, or use to select, the descriptive name of the user ID you want to assign to this user group.

Company

This field displays the company ID associated with this user ID.

Module Rights

Use this subtask to assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint modules to a user group by company.

In this subtask, a non-editable list of Costpoint modules displays in the **Module List** table window. Click **Select** to move module information from a selected row to the **Module Rights** table window, where you can select the type of rights and company. You can alternatively bypass the **Select** process and add new module rows by company directly in the **Module Rights** table window.

Use this screen whenever you want to assign module rights for one or more specific user groups.

Module List

Use this table window to view a list of available Costpoint modules. Highlight the row of the module for which you want to assign rights by company for the user group and click **Select** to move module information from the selected row to the **Module Rights** table window.

Alternatively, you can use the **Module Rights** table window to select the module for which you want to assign rights.

Module

This field displays the identification code for this module.

Name

This field displays the descriptive name for this **Module**.

Domain Name

This field displays the name of the domain containing this module. The domains are as follows:

- Accounting
- Projects
- Employee Management
- Materials Management
- System Controls

Select

Click this button to move module information from the selected row in the **Module List** table window to the **Module Rights** table window.

Module Rights

Use this table window to assign the user group's module rights by company for the modules selected in the **Module List** table window.

You can alternatively bypass the **Select** process and add new module rows by company directly in the **Module Rights** table window.

Module

This field displays the identification code for this module.

Module Name

This field displays the descriptive name for this **Module**.

Module Rights

Use this drop-down list box to select the type of rights to assign to the user group for this module for this company. The options are as follows:

- **Read Only** - Select this option to allow users to access this module, select data, and view data, but deny updating data.
- **Full** - Select this option to allow users to access this module, select data, and update data.
- **Deny** - Select this option to deny users access to this module.

Company

Use this field to enter, or use 🔍 to select, the company ID for this user's module rights. You can enter **ALL** in this field to automatically assign rights for this module to this user group across all companies.

Rights Status

This field only displays if the **Enforce Segregation of Duties Rules** check box is selected in the **Corporate Settings** block of the Configure System Settings screen. One of the following status statements populates the field:

- **System Approved** - Costpoint has verified that there are no segregation of duties conflicts for this right
- **In Conflict** - Costpoint has determined that one or more segregation of duties conflicts exist for this right. The rights cannot be used unless manually overridden using the Override Segregation of Duties Conflicts application.
- **Delete Conflict** - An attempt to delete this right has failed, since deleting the rights record would cause one or more segregation of duties conflicts.
- **Manually Approved** - Costpoint has determined that one or more segregation of duties conflicts exist for this right, but the conflicts have been manually overridden.
- **Pending** - An assigned right has yet to be checked for segregation of duties conflicts. The Identify Segregation of Duties Conflicts process must be run before this assigned right can be used.
- **Delete Requeste**d - An attempt to delete this right must be checked for segregation of duties conflicts. Identify Segregation of Duties Conflicts process must be run before this assigned right can be deleted.

Domain Name

This field displays the domain name for the application. The domain names are as follows:

- Accounting
- Projects
- Employee Management
- Materials Management
- System Controls

Application Rights

Use the fields in this subtask table window to assign **Read-Only**, **Full**, or **Deny** rights to a user in one or more Costpoint applications within a module. You may, for example, have given a user group**Full** rights to a specific module, but want to assign **Read-Only** or **Deny** rights to one or more specific applications within that module.

You cannot assign **Deny** rights at a higher level and then assign **Full** or **Read-Only** rights at a lower level.

As you drill down to lower levels to assign specific user group rights, the header information displays the module information (ID and name) to help keep you oriented.

Use this screen whenever you want to assign application rights (and drill down further to assign result set rights) to one or more specific user groups.

Application List

This table window displays all available applications within Costpoint. Highlight a row in this table window and then click **Select** to move the application for which you want to assign rights to the **Application Rights** table window.

Alternatively, you can use the **Application Rights** table window to search and select the application for which you want to assign rights.

Application

This field displays the identification code for this application.

Name

This field displays the descriptive name for this **Application**.

You can click at the end of the field, if necessary, to easily view extensive application name data without the need to use within the field.

Domain Name

This field displays the name of the domain containing this module. The domains are as follows:

- Accounting
- Projects
- Employee Management
- Materials Management
- System Controls

Module

This field displays the two letter module designation for this application.

Module Name

This field displays the descriptive name for this **Module**.

Area

This field displays the area to which this application belongs.

Select

Click this button to copy the selected application(s) in the **Application List** table window to the **Application Rights** table window.

Application Rights

Use this table window to assign access rights for the listed applications. You can click New to add a new application in this table window.

Application

This field displays the identification code for the application you selected from the **Application List** table window.

When adding a new application, use this field to enter, or use to select, the identification code of the application for which you want to assign rights.

Name

This field displays the descriptive name for this **Application**.

When adding a new application, you can use this field to enter, or use to select, the name of the application for which you want to assign rights.

Application Rights

Use this drop-down list box to select the type of rights to assign to the user for this application. The options are as follows:

- **Read-Only** - Select this option to allow users access to the application, select data, and view data but not to update data.
- **Full** - Select this option to allow users to access the application, select data, and update data.
- **Deny** - Select this option to deny users access to the application.

Company ID

Use this field to enter, or use to select, the company to which these application rights will apply. You can enter or select **ALL** to apply these right to all companies.

Subtasks

Subtask	Description
Result Set Rights by Application	Click this link to open the Result Set Rights By Application subtask and assign access rights to a user in one or more Costpoint result sets within an application.

Result Set Rights by Application

Use the fields in this subtask to assign access rights to a user in one or more Costpoint result sets within an application. You may, for example, have given a user full rights to a specific application (such as APMCASH - Cash Accounts, but want to assign no rights to one or more result sets within that application (such as APMCASH_DFLTCASHACCTS_HDR).

You cannot assign **No Rights** at a higher level and then assign **Read Rights**, **Update Rights**, **Insert Rights**, or **Delete Rights** at a lower level.)

Use this subtask whenever you want to assign result set rights by application to one or more specific user groups.

Application

This field displays the identification code of the application to which the list of result sets in the table window belongs.

Name

This field displays the descriptive name for this **Application**.

Table Window

Use this table window to assign rights to result sets associated with the selected application. You can add result sets to this table window by clicking New.

Result Set

Use this field to enter, or use to select, the identification code of the result set for which you want to assign rights.

Name

This field displays the name associated with the **Result Set** field in this row.

No Rights

Select this check box to assign the user no rights to this result set.

Read Rights

Select this check box to assign the user read rights to this result set.

Update Rights

Select this check box to assign the user update rights to this result set.

Insert Rights

Select this check box to assign the user insert rights to this result set.

Delete Rights

Select this check box to assign the user delete rights to this result set.

Company ID

Use this field to enter, or use to select, the identification code of the company for which you want to apply this setting. You can enter or select **ALL** from the Lookup list to apply this setting to all companies.

Subtasks

Subtask	Description
Deny Action Rights	Click this link to open the Deny Action Rights subtask and assign Deny Rights or Execute Rights to a user to one or more Costpoint actions/processes within the result set. You may, for example, have given a user update, insert, and/or delete rights to a specific result set within an application, but want to assign or withhold execute rights to a specific action/process within that result set. (You cannot assign Deny Rights at a higher level and then assign Execute Rights at a lower level.)
Deny Report Rights	Click this link to open the Deny Report Rights subtask and assign Deny Rights or Execute Rights to a user to one or more Costpoint reports within the result set. You may, for example, have given a user update, insert, and/or delete rights to a specific result set within an application, but want to assign or withhold execute rights to a specific report within that result set. (You cannot assign Deny Rights at a higher level and then assign Execute Rights at a lower level.)
Application Result Set Links	Click this link to open the Application Result Set Links subtask and determine which application(s) the result set is used in. The result set can be used in one or more applications.

Deny Action Rights

Use this subtask to assign rights to a user to one or more Costpoint actions/processes within the selected result set. You may, for example, have given a user full rights to a specific result set within an application, but want to assign or withhold the execute right to a specific action within that result set.

You cannot assign **Deny Rights** at a higher level and then assign **Execute Rights** at a lower level.

Use this screen whenever you want to assign action rights by result set for a specific user.

Application

This field displays the identification code of the application with which the list of actions in the table window is associated.

Name

This field displays the descriptive name for this **Application**.

Table Window

Use this table window to assign rights to actions associated with the selected result set. You can add actions to this table window by clicking New.

Action

Use this field to enter, or use to select, the identification code of the action for which you want to assign rights.

Action Name

This field displays the descriptive name for this **Action**.

Action Rights

Use this drop-down list box to select whether to **Deny Rights** or grant the user **Execute Rights** for this action.

Company ID

Use this field to enter, or use to select, the identification code of the company for which you want to apply this setting. You can enter or select **ALL** from the Lookup list to apply this setting to all companies.

Subtasks

Subtask	Description
Application Action Links	Click this link to open the Application Action Links subtask and determine which application(s) use this action. The action can be used in one or more applications.

Application Action Links

Use this subtask to determine which application(s) use this action. The action can be used in one or more applications.

Use this subtask whenever you need to determine where a particular action is used.

Application

This field displays the identification code of the application with which the list of applications in the table window is associated.

Name

This field displays the descriptive name for this **Application**.

Table Window

This table window lists the applications affected by the actions listed in the Deny Action Rights subtask.

Application

This field displays the application in which the action affects.

Name

This field displays the descriptive name for this **Application**.

Deny Report Rights

Use the fields in this subtask to assign **Deny Rights** or **Execute Rights** to a user for one or more Costpoint reports within the selected result set. You may, for example, have given a user update, insert, and/or delete rights to a specific result set within an application, but want to assign or withhold execute rights to a specific report within that result set.

You cannot assign **Deny Rights** at a higher level and then assign **Execute Rights** at a lower level.

Use this subtask whenever you want to assign report rights by result set for a specific user.

Application

This field displays the identification code of the application with which the list of reports in the table window is associated.

Name

This field displays the descriptive name for this **Application**.

Table Window

Use this table window to assign rights to reports associated with the selected result set. You can add reports to this table window by clicking New.

Report

Use this field to enter, or use to select, the identification code of the report for which you want to assign rights.

Name

This field displays the descriptive name for this **Report**.

Report Rights

Use this drop-down box to select whether to **Deny Rights** or grant the user **Execute Rights** for this report.

Company ID

Use this field to enter, or use to select, the identification code of the company for which you want to apply this setting. You can enter or select **ALL** from the Lookup list to apply this setting to all companies.

Subtasks

Subtask	Description
Application Report Links	Click this link to open the Application Report Links subtask and determine which application(s) use this report. The report can be used in one or more applications.

Application Report Links

Use this subtask to determine which application(s) use this report. The report can be used in one or more applications.

Use this subtask whenever you need to determine where a particular report is used.

Application

This field displays the identification code of the application with which the list of reports in the table window is associated.

Name

This field displays the descriptive name for this **Application**.

Table Window

This table window lists the applications affected by the reports listed in the Deny Action Rights subtask.

Application

This field displays the application in which the report affects.

Name

This field displays the descriptive name for this **Application**.

UI Profiles

Use this subtask to view a list of user interface (UI) profiles. A UI profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities. These UI profiles allow you to easily switch between customized Lookup tables, My Menu, and extensibility units that are specific to certain jobs, processes, or functions.

You can add, edit, or delete UI profiles using the Manage User Interface Profiles screen.

UI Profile

This field displays the identification code for this UI profile.

Name

This field displays the descriptive name for this **UI Profile** ID.

Priority

This field displays this UI profiles sequence number, which determines which UI profile takes precedence.

Assigned To

This field displays the user/user group ID to which this UI profile is assigned.

Company

This field displays the company with which the user/user group ID in the **Assigned To** field is associated.

Table Information

Changes to this screen update the following tables:

- W_ACTION_RIGHTS
    - W_APP_RIGHTS
    - W_MODULE_RIGHTS
    - W_RPT_RIGHTS
    - W_RS_RIGHTS
    - W_UI_PROF_USERS
    - W_USER_GRP_USERS
    - W_USER_UGRP_LIST

Manage User Interface Profiles

Use this screen to add, modify, or delete user interface profiles. A UI profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities. These UI profiles allow you to easily switch between customized Lookup tables, My Menu, and extensibility units that are specific to certain jobs, processes, or functions.

You must first set up the following screens before you can enter data on this screen:

- Manage Users
- Manage User Groups

To create a new user interface profile, complete the following steps:

1. Click New on the **UI Profile** block.
2. Enter a unique ID code to identify this user profile in the **UI Profile ID** field.
3. Enter a descriptive name for this UI profile ID in the **UI Profile Name** field.
4. Enter a number in the **Priority** field to determine this UI profile's priority level.
5. Use the Assigned Users/User Groups subtask to specify user or user group profile can access this UI profile in the **User/User Group** field as well as the company to which this UI profile applies.
6. Use the Extensibility Units subtask to specify and enable extensibility units to use in this UI profile.
7. Use the My Menu subtask to set up My Menu preferences for this UI profile.
8. Click on the toolbar.

To use a UI profile, set the **Priority** field of the UI profile you want to use to '1'. Costpoint does not allow duplicate priority numbers on multiple UI profiles. If you are setting a UI profile to priority '1', you must change the priority number of the UI profile you are replacing to another number.

Screen customization allows you to:

- Rearrange the position of objects on a screen (for example, fields, labels, and check boxes).
- Move an object from one tab to another tab within a screen or result set.
- Change the titles of group boxes.
- Create new group boxes.

- Rearrange the tabbing order of fields.
- Rearrange the columns in a table. (This is a company-wide custom option.)
- Change the title of tabs.
- Create new tabs.
- Change the order of tabs on a screen.

To customize an application for a UI profile, complete the following steps:

1. Close all applications and click .
2. Select the UI profile you want to modify and click **Enter Profile**.
3. Open the application you want to customize and modify the screen.
4. Click and click **Save** beside **Current Application Layout**.
5. Close all applications, click , and click **Exit Profile**.

Location

UI Profile ID

Use this field to enter an ID code for this UI profile.

UI Profile Name

Use this field to enter a descriptive name for this **UI Profile ID**.

Priority

Use this field to enter a sequence number for this UI profile. This determines which UI profile takes precedence.

Subtasks

Subtask	Description
Assigned Users/User Groups	Click this link to open the Assigned Users/User Groups subtask and specify the users and/or user groups that can access a UI profile.
Screen Customizations	Click this link to open the Screen Customizations subtask and view the current customizations enabled for a UI profile.
Extensibility Units	Click this link to open the Extensibility Units subtask and associate extensibility units to a UI profile.
My Menu	Click this link to open the My Menu subtask and specify My Menu settings for a UI profile.

Table Information

Changes to this screen update the following tables:

- W_UI_PROF
- W_UI_PROF_MYMENU

- W_UI_PROF_EXT_UNITS
- W_UI_PROF_USERS

Assigned Users/User Group

Use this subtask to specify which user and/or user groups can access a UI profile. You must first set up the Manage Users and Manage User Groups before you can enter data in this subtask.

User/User Group

Use this field to enter, or use 🔍 to select, a user or user group ID to associate with this UI profile.

Name

This field displays the descriptive name for this **User/User Group**.

Type

This field displays **User**, when you enter a user profile, or **User Group**, when you enter a user group profile, in the **User/User Group** field.

Company

Use this field to enter, or use 🔍 to select, a company to associate with this UI profile.

Screen Customization

Use this subtask to view the current customizations applied to a UI profile.

Customization Type

This field displays the customization types currently applied to this UI profile. The customization types are:

- **TOOLBAR -** This type indicates that there are screen customizations applied to the toolbar.
- **LOOKUP** - This type indicates that there are screen customizations applied to the lookup tables.
- **APPLICATION -** This type indicates that there are screen customizations applied to an application.

Customization Description

This field displays a brief description of the **Customization Type**.

When the **Customization Type** field displays **TOOLBAR**, this field displays one of the following descriptions:

- **Data Entry** - This description indicates that one or more data entry tools are customized.
- **Inquiry -** This description indicates that one or more inquiry tools are customized.
- **Process -** This description indicates that one or more process tools are customized.
- **Report -** This description indicates that one or more report tools are customized.

When the **Customization Type** field displays **LOOKUP**, this field displays the customized Lookup RS ID and Lookup Column ID, separated by a tilde (~) (for example, ITEMREV_LKP~ITEM).

When the **Customization Type** field displays **APPLICATION**, this field displays the customized application screen represented by the application ID and application name, separated by a colon (:) (for example, APMVCHR: Manage Accounts Payable Vouchers).

Extensibility Units

Use this subtask to associate extensibility units to a UI profile. An extensibility unit is a logical collection of customized software components which includes business logic rule modifications and additions as well as screen customization modifications.

Extensibility Unit

Use this field to enter, or use 🔍 to select, an extensibility unit to associate with this UI profile.

Name

This field displays the descriptive name of the **Extensibility Unit**.

Valid

This field displays **Y** if this extensibility unit can be used for this UI Profile. Otherwise, this field displays **N**. When you select an invalid extensibility, Costpoint displays the following warning message before you can continue: "This Extensibility Unit is invalid."

Active

Select this check box to enable this extensibility unit for this UI profile.

My Menu

Use this subtask to set up My Menu for a UI Profile. My Menu allows you to access shortcuts to the applications you frequently use without navigating through the entire Costpoint menu. You can access My Menu by clicking ★ located on the upper-left portion of your screen.

My Menu Application List

This table window displays a list of all the Costpoint applications from which you can select those to include on My Menu. The fields in this table window display all of the pertinent information for each application and their location within Costpoint.

To select applications to include on My Menu, select the application on this list of all Costpoint applications, and then click Select. The selected application is then moved to the My Menu table window to verify that it is now included on My Menu.

Application

This field displays the ID code of this application.

Name

This field displays the descriptive name of this **Application**.

Domain

This field displays the domain where this application is located. Costpoint is broken down into five domains where applications that perform one general function are grouped together by module and then by area of function. The domains are:

- Accounting
- Projects
- People
- Materials
- Administration

Module

This field displays the ID of the module where this application is located. Costpoint domains are broken down into modules where related applications are grouped together by their area of function.

Module Name

This field displays the descriptive name of this **Module**.

Area

This field displays this application's area of function.

My Menu

Use this table window to set up a list of applications you can access using My Menu.

Click New to add a new entry to this table window or select an application from the **My Menu Application List** table window and click **Select** to add that application to this table window.

Sequence

Use this field to enter sequence numbers to determine the order of the menu items displayed on My Menu. Use this field to arrange or rearrange the order in which applications and headers displays on My Menu.

Line Type

Use this drop down list box to select whether this entry is an **Application** or **Header**.

If you select **Application**, you must then enter a descriptive title to identify this application in the **My Menu Title** field and specify the application ID in the **Application** field. If you used the **My Menu Application List** table window to select an application, this field automatically selects **Application** as the line type and Costpoint automatically populates the rest of the fields.

If you select **Header**, you must then enter a descriptive name for this group header. This group header acts as an expandable/collapsible separator for your application groupings.

My Menu Title

Use this field to enter a descriptive title to identify this application or group header. This title is what displays on My Menu. If you used the **My menu Application List** table window to an application, Costpoint automatically populates this field.

Application

Use this field to enter, or use to select, the ID code of the application you want to include on My Menu. If you used the **My Menu Application List** table window to select an application, Costpoint automatically populates this field.

Application Name

This field displays the name of the selected application.

Manage Users Screen

Use this screen to set up user-specific data for Costpoint.

Companies frequently limit access to these screens to system administrators, who can, by using options in these screens, permit users to change a limited number of data fields (such as telephone, password, and some defaults) set up in the Configure User Preferences screen

Use this screen to add a new user or to edit existing user information. This screen has the following tabs:

- **Information** — Use this tab to enter user information, such as password, status, and assign permissions to change user information.
- **Workflow** — Use this tab to specify workflow and email user preferences.
- **Printing Defaults** — Use this tab to enter a user's default Web printing settings and locale (if they differ from the system defaults).
- **Authentication** — Use this tab to define how Costpoint verifies user login.
- **User Interface** — Use this tab to specify settings for screen configuration changes.

You must also consider the following when using this screen:

- Before you can assign a default locale to a user in this screen, you must first enter locale information on the Manage Report Locales screen.
- Before you can assign a default printer to a user in this screen, you must first establish a catalog of printers installed in the Actuate report server that will be available for selection when printing reports from Costpoint on the Manage System Printers screen. You must already have linked a user to one or more printers using the Assigned Users/User Groups subtask on the Enter/Manage System Printers screen.
- Before you can assign an employee ID to a user in this screen, you must first set up the employee in the Manage User Information screen.
- Before you can assign a default company to a user in this screen, you must first set up the company in client server on the Configure Company Information screen.
- Before you can assign a default taxable entity to a company to which you have enabled user access in this screen, you must first set up the taxable entity on the Configure Company Information screen.
- Before you can assign a default organization security group to a company to which you have enabled user access in this screen, you must first set up the organization security group on the Manage Organization Security Groups screen.
- Before you can assign one or more user groups to this user, you must first enter user group information on the Manage User Groups screen.

After you specify your preferences, click on the toolbar to save your settings.

Location

- Administration
- Security
- System Security

Identification

Use the fields in this block to create new identification parameters for a user or retrieve an existing user identification for which you want to update data. To retrieve an existing user data, you can either use Query or the **User Name** field.

User ID

Use this field to create an identification code for new user data or view an existing user ID retrieved using Query or the **User Name** field.

When creating new user data, use this field enter the identification code you want to use for the new user. As you enter the ID, each letter displays on the screen in uppercase, even when you enter it in lowercase. This ensures that the same sequence of letters and numbers will map to one Costpoint user ID. For example, if a user enters smithj, SmithJ, or SMITHJ, Costpoint will assign the attributes of Costpoint user SMITHJ to that user.

User Name

Use this field to create a descriptive name for this **User ID** or retrieve an existing user name for which you want to update data.

When creating new user data, use this field to enter a descriptive name for the user identification you enter in the **User ID** field.

When updating user data, use this field to enter, or click to select, the descriptive name of the user ID for which you want to update data.

You can select the **Can Change Name** check box in the Information tab to allow this user to change his/her user name as he/she desires.

Subtask

Subtask	Description
Company Access	Click this link to open the Company Access subtask and specify organization security, default taxable entity, and data suppression options for a user.
Assigned User Groups	Click this link to open the Assigned User Groups subtask and link one or more user groups to a user.
Module Rights	Click this link to open the Module Rights subtask and assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint modules to the currently selected user group.
Application Rights	Click this link to open the Application Rights subtask and assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint applications within a module to the currently selected user group.
UI Profiles	Click this link to open the UI Profiles subtask and assign use interface profiles to the currently selected user group.

Company Access

Use this subtask to add user data or edit existing company, organization security group, default taxable entity data, and data suppression options for a user.

Before you use this screen, first consider the following:

- If you plan to assign a company to a user in this screen, you must first set up the company and the default taxable entity using the Set Up Company screen.
- If you plan to assign a default organization security group to a company to which you have enabled user access in this screen, you must first set up the organization security group using the Manage Organization Security Groups screen.

Company ID

Use this field to enter, or use 🔍 to select, a company ID with which to associate this user.

Default Taxable Entity ID

Use this field to enter, or use 🔍 to select, the default taxable entity for the company associated with this user.

Org Security Group ID

Use this field to enter, or use 🔍 to select, the organizational security group ID to which you want to add this.

To add this user to another organizational security group, you must click New to add another row in this table window. You can enter **ALL** to automatically assign this user to all organizational security groups.

Labor

Select this check box to suppress the display of labor information when this user opens a screen or prints a report in which labor data would normally display.

SSN

Select this check box to suppress the social security number (SSN) when this user prints reports on which this number normally appears. Blanks appear on the report instead of the number.

This check box does not affect payroll reports because you can use organization security to limit user rights and because certain government tax reports require the SSN.

Cost

Select this check box to suppress the display of cost information when this user opens a screen or prints a report in which cost data would normally display.

Price

Select this check box to suppress the display of price information when this user opens a screen or prints a report in which price data would normally display.

Company Name

This field displays the descriptive name for this **Company ID**.

Org Security Group Name

This field displays the descriptive name for this **Org Security Group ID**.

Taxable Entity Name

This field displays the descriptive name for this **Default Taxable Entity ID**.

Rights Status

This field only displays if the **Enforce Segregation of Duties Rules** check box is selected in the **Corporate Settings** group box of the Configure System Settings screen. One of the following status statements populates the field:

- **System Approved** - This status indicates that Costpoint has verified that there are no segregation of duties conflicts for this right.
- **In Conflict** - This status indicates that Costpoint has determined that one or more segregation of duties conflicts exist for this right. The rights cannot be used unless manually overridden using the Manage Segregation of Duties Conflict Overrides application.

- **Delete Conflict** - This status indicates that an attempt to delete this right has failed, since deleting the rights record would cause one or more segregation of duties conflicts.
- **Manually Approved** - This status indicates that Costpoint has determined that one or more segregation of duties conflicts exist for this right, but the conflicts have been manually overridden.
- **Pending** - This status indicates that an assigned right has yet to be checked for segregation of duties conflicts. The Identify Segregation of Duties Conflicts process must be run before this assigned right can be used.
- **Delete Requested** - An attempt to delete this right must be checked for segregation of duties conflicts. Identify Segregation of Duties Conflicts process must be run before this assigned right can be deleted.

Assigned User Groups

Use this subtask to link one or more user groups to a user. You are not required to link a user group to a user.

The most efficient way to set up security rights for users is to first establish rights for user groups. Then, if necessary, you can use the Module Rights subtask in this screen to override group rights for this user at the module level. If you choose, you can assign rights at the application, result set, or action/report rights by result set levels, as desired.

You can assign one or more user groups to a user in this screen or you can assign users to a user group using the Manage User Groups screen.

Use this screen whenever you want to link one or more user groups to a user. Before you can use this screen, you must set up the following screens:

- You must set up user group information in the Manage User Groups screen. Because you can establish security rights to each user group, a user assigned to a specific user group inherits the security rights of that user group.
- You must set up companies using the Set Up Company screen.

User Group

Use this field to enter, or click 🔍 to select, the user group ID to which you want to add this user.

User Group Name

This field displays the descriptive name for this **User Group**.

Company

Use this field to enter, or click 🔍 to select, the company ID for which the user group should be applicable for this user. You can enter **ALL** in this field to automatically assign this user group to this user across all companies.

Rights Status

This field only displays if the **Enforce Segregation of Duties Rules** check box is selected in the **Corporate Settings** group box of the Configure System Settings screen. One of the following status statements populates the field:

- **System Approved** - This status indicates that Costpoint has verified that there are no segregation of duties conflicts for this right.
- **In Conflict** - This status indicates that Costpoint has determined that one or more segregation of duties conflicts exist for this right. The rights cannot be used unless manually overridden using the Manage Segregation of Duties Conflict Overrides application.

- **Delete Conflict -** This status indicates that an attempt to delete this right has failed, since deleting the rights record would cause one or more segregation of duties conflicts.
- **Manually Approved -** This status indicates that Costpoint has determined that one or more segregation of duties conflicts exist for this right, but the conflicts have been manually overridden.
- **Pending -** This status indicates that an assigned right has yet to be checked for segregation of duties conflicts. The Identify Segregation of Duties Conflicts process must be run before this assigned right can be used.
- **Delete Requested -** An attempt to delete this right must be checked for segregation of duties conflicts. Identify Segregation of Duties Conflicts process must be run before this assigned right can be deleted.

Table Information

Changes to this screen updated the following tables:

- W_ACTION_RIGHTS
  - W_APP_RIGHTS
  - W_MODULE_RIGHTS
  - W_RS_RIGHTS
  - W_UI_PROF_USERS
  - W_USER_COMPANY
  - W_USER_GRP_USERS
  - W_USER_UGRP_LIST

Archived Report Security

Manage Archived Report Security Rights

Use this screen to specify the user/user group and report/report group for which to establish report archive security rights. You can also designate the applicable companies, archive files, and archive file rights.

Companies frequently restrict access to these screens to Costpoint administrators for the purpose of assigning archive rights to a report (or report group), a user (or user group), or for reviewing and editing existing rights.

Use the **Report Group Reports** table window to view the details of the reports or report categories linked to the user or user group.

Before you use this screen, you must first establish users in the Manage Users screen, user groups in the Manage User Groups screen, and report groups in the Manage Report Groups screen.

Location

- Administration
- Security
- Archived Report Security

Identification

Use this block to specify the user/user group and report/report group for which to establish report archive security rights.

User / User Group

Use this field to enter, or use to select, the user or user group ID, as applicable, for which to add, edit, or review report archive security rights.

Type

This field displays **User** if you entered a user ID or **User Group** if you entered a user group ID in the **User / User Group** field.

The field to the right displays the descriptive name for this user or user group ID. As an alternative, you can use in this field to select the user or user group you want to use.

Report / Report Group

Use this field to enter, or use to select, the report or report group ID, as applicable, for which to add, edit, or review report archive security rights.

Type

This drop-down list box automatically displays **Report** if you entered a report ID or **Report Group** if you entered a report group ID in the **Report / Report Group** field. You can modify this setting by selecting a different option using this drop-down list box.

The field to the right displays the descriptive name for this report or report group ID. As an alternative, you can use in this field to select the report or report group you want to use.

Rights

Use this group box to designate the applicable companies, archive files, and archive file rights.

Applicable Companies

Use this group box to apply report archive security rights to all companies or to designate a specific company for which to establish report archive security rights.

Apply Rights to All Companies

Select this check box to apply the designated report archive security rights to all companies.

Company

If you selected the **Apply Rights to All Companies** check box, this field automatically displays **ALL** and cannot be edited.

If you cleared the **Apply Rights to All Companies** check box, use this field to enter, or use to select, the company to which you want to apply this report archive security rights.

Archive Files

Use this group box to apply report archive security rights to all associated archive files or to designate a specific archive file name for which to establish report archive security rights.

Apply Rights to All Associated Archive Files

Select this check box to apply the designated report archive security rights to all associated archive files.

Archive File Name

If you selected the **Apply Rights to All Associated Archive Files** check box, this field automatically displays **ALL** and cannot be edited.

If you cleared the **Apply Rights to All Associated Archive Files** check box, use this field to enter, or use to select, the associated archive file to which you want to apply this report archive security rights.

Archive File Rights

Use this group box to designate viewing, modification/deletion, and organization security features within the established report archive security rights.

Allow Viewing of Archive File

Select this check box to allow viewing rights of the archive file(s) for this user/user group and report/report group combination.

Allow Modification/Deletion of Archive File

Select this check box to allow modification/deletion rights of the archive file(s) for the designated user/user group and report/report group combination.

Ignore Org Security

Select this check box to ignore established organization security of the archive file(s) for this user/user group and report/report group combination.

Report Group Reports

Use this table window to view the details of the reports or report categories linked to the user or user group.

Report

If you entered a report group ID in the **Report / Report Group** field, this field displays the report technical names that were assigned to that report group.

If you entered a report ID in the **Report / Report Group** field, this field is blank.

Report Name

If you entered a report group ID in the **Report / Report Group** field, this field displays the report names that were assigned to that report group.

If you entered a report ID in the **Report / Report Group** field, this field is blank.

Report Category Name

If you entered a report group ID in the **Report / Report Group** field, this field displays the report category names that were assigned to that report group.

If you entered a report ID in the **Report / Report Group** field, this field is blank.

Archive Category Name

If you entered a report group ID in the **Report / Report Group** field, this field displays the report archive category names that were assigned to that report group.

If you entered a report ID in the **Report / Report Group** field, this field is blank.

Table Information

Changes to this field update the following tables:

- S_RPT_LIST
- W_RPT_ARCH_RIGHTS
- W_RPT_CATGR

Security Reports/Inquiries

Print Effective User Rights Report

Use this screen to generate a report that contains the effective module and function rights for a user. These rights are a combination of the group rights and the user override rights for each user. The default sort for this report is by company.

This function uses dynamic temporary tables. For more information on dynamic temporary tables, refer to the Application Locking/Dynamic Tables special topic.

Print this report whenever you need to review the effective user rights for Costpoint users. This report is not part of the system audit trail and need not be retained.

Location

- Administration
- Security
- Security Reports/Inquiries

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use this group box to specify the range of companies, modules, and users you want to include in this report.

Company

Use this drop-down list box to select the range of company IDs you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Module

Use this drop-down list box to select the range of module IDs you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option. The default selection for this field is All. If you have a large number of jobs, you may not want to use this default option.

User

Use this drop-down list box to select the range of user IDs you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.

- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Start

Use this field to enter, or use to select, the starting company ID, module ID, or user ID, as applicable.

End

Use this field to enter, or use to select, the ending company ID, module ID, or user ID, as applicable.

Sort By

Use this field to specify how Costpoint sorts the data in this report.

1st Sort

Use this drop-down list box to sort the data in this report by **Company** or **User**.

2nd Sort

This field displays **User** to indicate that each company or user data (based on your selection in the **1st Sort** field) will be sorted by user ID.

3rd Sort

This field displays **Module** to indicate that each user data (as indicated in the **2nd Sort** field) will be sorted by module ID.

Page Break

Select this check box to insert a page break after each company or user data (based on your selection in the **1st Sort** field).

Options

Use this group box to specify additional settings you want to use for this report.

Result Set, Report and Action Rights

Select this option to include result sets, reports, and action rights data in this report.

Table Information

Changes to this field update the W_FUNC_PARM_CATLG table.

Print User Report

Use these screens to generate a report that contains user data from the Manage Users screen and user preferences data from the Configure User Preferences screen.

This report prints the following information derived from the Manage Users screen:

- Employee ID (from the User Information group box in the Information tab)
- Phone Number (from the User Information group box in the Information tab)
- Extension (from the User Information group box in the Information tab)
- Default Company (from the Preferences User Can Change group box in the Information tab)

This function uses dynamic temporary tables. For more information on dynamic temporary tables, refer to the Application Locking/Dynamic Tables special topic.

To print security information and company information on this report, you must also select the **Security Information** and **Company Detail** check boxes in the **Show** group box in this screen.

Print this report whenever you need to review the security and/or user preference information on your Costpoint users.

This report is not considered part of the system audit trail and need not be retained.

Location

- Administration
- Security
- Security Reports/Inquiries

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use this group box to specify the range of users and companies you want to include in this report.

User

Use this drop-down list box to select the range of user IDs you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Company

Use this drop-down list box to select the range of company IDs you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Start

Use this field to enter, or use 🔍 to select, the starting user ID or company ID, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending user ID or company ID, as applicable.

Sort By

Use this field to specify how Costpoint sorts the data in this report.

1st Sort

Use this drop-down list box to sort the data in this report by **User** or **Company**.

Page Break

Select this check box to insert a page break after each user or company data (based on your selection in the **1st Sort** field).

Options

Use this group box to specify additional settings you want to use for this report.

Show

Use this group box to specify whether to print security information and company detail on the report.

Security Information

Select this check box to show security information in the report, as follows, from the Manage Users screen:

- The **Deactivation Date** field in the **Status** group box of the Information tab.
- The **Date Password Changed** field in the **Status** group box of the Information tab.
- The **Can Change Password** check box in the **Preferences User Can Change** group box of the Information tab.
- The **Can Change Phone and Extension** check box in the **Preferences User Can Change** group box of the Information tab.
- The **Can Change Name** check box in the **Preferences User Can Change** group box of the Information tab.
- The **Can Change Default Company** check box in the **Preferences User Can Change** group box of the Information tab.
- The **Send Workflow Activity** check box in the **Workflow Email** group box of the Workflow tab.
- The **Send Workflow Messages** check box in the **Workflow Email** group box of the Workflow tab.
- The **Email Name** field in the **Workflow Email** group box of the Workflow tab.

Company Detail

Select this check box to show company details in the report, as follows, from the Company Access subtask of the Manage Users screen:

- The **Company ID** field
- The **Company Name** field
- The **Default Taxable Entity ID** field
- The **Org Security Group ID** field
- The **Org Security Group Name** field
- The **Labor** check box
- The **Cost** check box
- The **Price** check box

Include Deactivated Users

Select this check box to include deactivated users in the report.

Subtask

Subtask	Description
User Non-Contiguous Ranges	Click this link to open the User Non-Contiguous Ranges subtask and enter non-contiguous user selections, if applicable.

User Non-Contiguous Ranges

Use this subtask to specify multiple ranges of user records to include in the User Report. Use New to add a new line to the table window. One line represents one range.

User Option

Use the drop-down list box to select the desired range of user records to use. The following options are available:

- **One** - Select this option to include only one record. You must enter that value in the **Starting User** field. The **Ending User** field is disabled for this option.
- **Range** - Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Starting User** field and the ending value of the range in the **Ending User** field.
- **From Beginning** - Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **Ending User** field. The **Starting User** field is disabled for this option.
- **To End** - Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Starting User** field. The **Ending User** field is disabled for this option.

Starting Tax Code

Use this field to enter, or use to select, the starting tax code, as applicable.

Ending Tax Code

Use this field to enter, or use to select, the ending tax code, as applicable.

Table Information

Changes to this screen update the following tables:

- NCR_USER_ID
  - W_FUNC_PARM_CATLG

Print User Group Rights Report

Use this screen to generate a report that contains user/user group data by company or module rights data by company or by user group. Print this report whenever you need to review the rights for your Costpoint user groups, or whenever you need to review which users belong to which user groups.

For user/user group data, this report prints the following information from the Manage User Groups screen:

- Company (as assigned to the user in the Assign Users to Group subtask)
- User Group ID (from the User Groups table window)
- User Group Name (from the User Groups table window)
- User ID (as assigned to the user group from the Assign Users to Group subtask)
- User Name (as assigned to the user group from the Assign Users to Group subtask)

For module rights data by user group, this report prints the following information from the Manage User Groups screen:

- Company (as assigned to the user in the Assign Users to Group subtask)
- User Group ID (from the **User Groups** table window)
- User Group Name (from the **User Groups** table window)
- User ID (as assigned to the user group from the Assign Users to Group subtask)
- User Name (as assigned to the user group from the Assign Users to Group subtask)
- Module/Application/Result Set (from the Module Rights subtask and subset links)
- Module/Application/Result Set Name (from the Module Rights subtask and subset links)
- Rights (from the Module Rights subtask and subset links)

If you have selected the **Application Detail** check box in this screen, this report also prints the Application Name (from the Module Rights subtask)

This function uses dynamic temporary tables. For more information on dynamic temporary tables, refer to the Application Locking/Dynamic Tables special topic.

Location

- Administration
- Security
- Security Reports/Inquiries

Selection Ranges

Use this group box to specify the range of organization security profiles you want to update.

Option

Use this drop-down list box to select the range of companies, user groups, users, and modules you want to include in this report. The following options are available:

- **All** — Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.

The default selection for this field is All. If you have a large number of jobs, you may not want to use this default option.

Start

Use this field to enter, or use to select, the starting company ID, user group ID, user ID, or module ID, as applicable.

End

Use this field to enter, or use to select, the ending company ID, user group ID, user ID, or module ID, as applicable.

Sort By

Use this field to specify how Costpoint sorts the data in this report.

1st Sort

Use this drop-down list box to sort the data in this report by **Company** or **User Group**.

Page Break

Select this check box to insert a page break after each company or user group data (based on your selection in the **1st Sort** field).

Options

Use this group box to specify additional settings you want to use for this report.

Users

Select this option to show user information, as follows, from the Manage User Groups screen:

- User ID (as assigned to the user group from the Assign Users to Group subtask)
- User Name (as assigned to the user group from the Assign Users to Group subtask)

Rights

Select this option to show user rights data, as follows, from the Module Rights subtask and subset links from the Manage User Groups screen:

- User ID (as assigned to the user group from the Assign Users to Group subtask)
- User Name (as assigned to the user group from the Assign Users to Group subtask)

Application Detail

Select this check box to print the name of the module, application, or result set, as applicable, along with the specific rights granted to users or user groups in the report. You must select the **Rights** option in the **Options** group box before you can access this check box.

Table Information

Changes to this field update the W_FUNC_PARM_CATLG table.

View License Information

Use this screen to view Costpoint licensing information. Total active employee licenses are listed by company and licensed add-on modules are also listed on this screen.

Location

- Administration
- Security
- Security Reports/Inquiries

Enterprise Licenses

This block displays the number of employees licensed to use Costpoint.

Maximum Licensed Employees

This field displays the maximum number of employee licenses available.

Active Employees

This field displays the current number of active licenses.

Active Employees by Company

This table window displays all active employee licenses sorted by company.

Company

This field displays the identification code for this company.

Company Name

This field displays the descriptive name for this **Company**.

Employee Count

This field displays the number of active licenses within this company.

Licensed Add-On Modules

This field displays all available licensed add-ons for Costpoint.

Product Code

This field displays the identification code for this licensed add-on.

Product Name

This field displays the descriptive name for this **Product Code**.

Termination Date

This field displays the date on which the license for this add-on expires.

Table Information

Information on this screen derives from the following tables:

- EMPL
    - PROD_LICENSE

Job Management Codes

Manage Job Groups

Use this screen to set up the job groups used by the Manage Jobs and Print Job Report screens. The creation of job groups is optional.

You must create groups in this screen before you can assign jobs to job groups in the Manage Jobs screen or use the Print Job Report screen.

Location

- Administration
- Job Management
- Job Management Codes

Table Window

Use this table window to add (New) or delete (Delete) job groups.

Job Group ID

When creating a new job group, use this field to enter an identification code for this job group. You can categorize jobs by department, accounting function, or any other grouping.

Table Information

Changes to this screen update the JOB_GRP table.

Manage Jobs Screen

Use this screen to create and modify jobs. It allows you to manage the Costpoint functions that comprise the jobs. These functions include reports, computations, and postings. You must first set up a job in this screen before you can submit it for execution.

When you have completed your entries, click on the toolbar to updated the table. During the save process, Costpoint deletes table rows marked for deletion and store new or updated table rows. An authorized user can update all entries in the table, regardless of who created them.

You must first save function parameters in the individual Costpoint function screens before you can associate them with a job in this screen. After saving parameters, you can use them in any job. If the data entered in the **Job ID** field is to be associated with a job group, you must first define the job group in the Manage Job Groups screen. Although you can add, delete, or change the information in this screen at any time, use caution — your edits may affect how the job is run.

Location

- Administration
- Job Management
- Job Management Codes

Identification

Use the fields in this block to create the job ID, its description, and optionally assign it to a job group. Use New to create a new job.

Job ID

Use this field to enter an identification code for this job.

Description

Use this field to enter a brief description for this job.

Job Group

Use this drop-down box to select a job group with which you want to associate this job.

You must first establish job groups in the **Manage Job Groups** screen before you can use this field.

Details

Use this group box to specify additional application failure and priority options for this job ID.

On Application Failure

Use this group box to select how Costpoint proceeds if an entry or step in the process fails during execution on the job server.

Use Default

Select this option to use the default function when a step in this job fails. The default functions is based on the following conditions:

- If the step that failed is a computation or posting function, the process server stops this job.
- If the step is a report function, the process server continues this job.

Halt

Select this option to signal the process server to stop executing this job whenever a step fails.

Continue

Select this option to signal the process server to continue executing this job whenever a step fails.

Comments

Use this field to enter comments and additional information for this job.

Default Priority

Use this field to enter a default value that determines the priority level for this job in the job server. The job server determines which jobs to process first based on this priority level. You can enter a value from 1 (highest) to 99 (lowest).

Users that have the **Allow User to Override Batch Job Priority** check box in their user information (in the **Manage Users** screen), can override the default priority level when submitting a job to the job queue in batch mode.

Modification Information

This group box displays information about the creation or modification of this job.

Creator

This field displays the user ID of the individual who initially saved this job. When creating a new job, Costpoint inserts your user ID.

Creation Date/time

This field displays this job's initial creation date and time. The information in this field is never updated after the first save.

Last Mod Date/Time

This field displays the date and time in which this job was last modified. Costpoint updates the modification date each time the job is saved.

Job Operations

Use this table window to set up the sequence of applications that will run when this job is processed in the job server.

Sequence

This field displays the order of the steps in this table window. This field automatically updates when you insert or delete a row in the table.

You can change the sequence of the applications by changing the sequence number for each row in this table window. Each row must have a different sequence number.

Module

Use this field to enter, or use to select, the Costpoint module in which the application you want to include is located.

Application

Use this field to enter, or use to select, the Costpoint application you want to launch when this job is processed.

Application Name

This column displays the descriptive name of this **Application**.

Parameter

Use this field to enter, or use to select, the parameters previously saved for the report, computation, or posting function.

You must first set up parameters using the application's screen and use the Identification block to specify a parameter ID. When you click on the application screen, Costpoint stores these parameters, which can be used in this field.

If the **Module** or **Application** field is blank when you enter data in this field, Costpoint automatically updates the **Module**, **Application**, and **Parameter Description** fields with the corresponding data associated with this parameter ID.

Parameter Description

This column displays a brief description of the parameter ID.

Process

If the Costpoint application to be launched is a process or computation, use this field to enter, or use to select, the process associated with the selected parameter ID in the **Parameter** field.

Process Name

This field displays the descriptive name of this **Process**.

Report

If the Costpoint application to be launched is a report, use this field to enter, or use to select, the report associated with the selected parameter ID in the **Parameter** field.

Report Name

This field displays the descriptive name of this **Report**.

Table Information

Changes to this screen update the following tables:

- JOB
    - JOB_FUNC_PARAM

Manage Job Queues Screen

Use this screen to create job queues and manage their entries. Like the Update Job Status screen, this screen provides information on the status of a particular queue, the job server processing the jobs, and the jobs that the queue contains. If you have function rights to this screen, you can update any processes waiting for execution on the process server. (This is one of the significant differences between the Update Job Status screen and this screen.) In addition, you can create new queues or change the status of existing queues.

This screen is normally restricted to a system administrator for the purpose of creating and managing job queues in Costpoint.

Before a job appears on this screen, you must submit it to the queue using the Submit Job to Queue screen. The jobs that have been submitted to the queue appears on this screen flagged with any of the following statuses:

- **Executing** — This status indicates that the scheduled job is currently processing. You cannot edit this job while it is still processing. Jobs with this status will be set to **Aborted** when a server is brought up with the same ID.
- **Aborted** — This status indicates that the scheduled job did not finish successfully.
- **Hold** — This status indicates that the scheduled job is currently on hold for processing.
- **Pending** — This status indicates that the scheduled job is not yet started.

You cannot enter new jobs in this screen. You can only update or delete processes sent to the queue if **Aborted**, **Hold**, or **Pending** appears in the **Status** field. After you update or delete the jobs in this screen, save the screen to retain any changes. The **Server** and **Status** fields are non-editable. You can make changes to the attached server or to the server's status in the Update Job Queue Status screen.

You must first create a job in the Manage Jobs screen before you can use this screen. After you create the job, you can send it to the queue using the Submit Job to Queue screen. You can click or Query to select a queue to populate the screen.

If you send a job to the queue and its status is **Pending**, the **Start Time** and **Start Date** determine when the job is executed on the job server.

Location

- Administration
- Job Management
- Job Management Codes

Job Queues

Use this block to select a job queue, specify whether jobs should be run sequentially or in parallel (Oracle DBMS only), and view the activity of the attached job servers.

Identification

Use this group box to specify a job queue ID.

Job Queue ID

When creating a new queue, use this field to enter an identification code for this job queue.

To use existing queues, use this field to search for and select a queue ID.

Process Sequentially

Select this check box to enable sequential job processing for this queue.

Jobs in a user-defined queue run simultaneously on different threads, unless it is set up as a sequential queue. Jobs in a sequential queue run sequentially, one after the other.

Use Parallel SQL

Select this option to enable parallel query and parallel DML. This option is available only if you are using Oracle DBMS. For other DBMS such as MS SQL Server, this option does not display.

Parallel query is a technique the DBMS uses to improve performance by breaking down tasks into smaller subtasks and executing them in parallel. Parallel DML complements parallel query by providing both querying and updating capabilities for DSS databases, thus, speeding up large DML operations against large database objects.

Parallel execution can be enabled at 3 different levels:

- Session Level (connection time)
- Table or Index Level (creation time)
- Statement Level (statement execution)

Performance gain varies according to the type of SQL operation. It is significant in the following:

- Decision Support Systems (DSS)
- Data Warehousing Operations
- Batch Processing

Jobs must be submitted through the Process Server. Oracle automatically performs the SQL statements that involve SELECT operations in parallel mode.

Certain hardware requirements must be met. Requirements include:

- Symmetric multiprocessors (SMP)
- Clusters or massively parallel systems
- Sufficient I/O bandwidth

- Underutilized CPU.

Attached Servers

Use this table window to view all the job servers attached to this job queue.

Server

This field displays the servers associated with this job queue ID.

Queue Active

This field displays **Y** if this job server is active. Otherwise, this field displays **N**.

Scheduled Jobs

Use this table window to view and modify the details of scheduled jobs.

Job

This field displays the job ID of each job that has been submitted to the queue.

Description

This field displays the description of the job ID in the **Job** field. Job descriptions are set up in the Manage Jobs screen.

Status

This drop down list box displays the current status of the job. They are as follows:

- **Scheduled** — The job is executed as soon as it reaches the top of the entry list and a server is available.
- **Hold** — The job is not executed until you change the status to **Scheduled**.
- **Executing** — The job server is currently processing this job. You cannot change the status in this circumstance.
- **Aborted** — The job was submitted but was not executed successfully. You cannot change the status of an Aborted job, but you can delete the entry.
- **Queued** — The job was submitted and is currently queued for processing.
- **Suspended** — The job was submitted but is currently suspended to be processed at a future date and time.
- **Canceling** — The job was submitted and processed and is currently being cancelled by Costpoint.

You can change the status of a job by selecting one of the options from this drop-down list box.

To execute a job, select **Scheduled** from this drop-down list and enter the scheduled date and time in the **Start Date** and **Start Time** fields, respectively.

If you change the status from **Scheduled** to **Hold**, Costpoint automatically clears the data in the **Start Date** and **Start Time** fields after you save this job queue.

If you change the status from **Hold** to **Scheduled** and you have not entered a start date or time, Costpoint automatically enters the current date and time in the **Start Date** and **Start Time** fields you save this job queue.

Costpoint automatically changes the job status to **Aborted** if the application fails as a result of server failure. Any jobs with a status of Executing will be set to Aborted when a server is brought up after failure.

Start Date

Use this field to enter, or click to select, the scheduled date on which to execute this job on the job server.

If you selected **Start Time/Date** from the **Execution Option** drop-down list box in the Submit Job to Queue screen, Costpoint automatically displays that date in this field. You can edit this default data.

If you enter data in the **Start Time** field, entry in this field is required.

Start Time

Use this field to enter the scheduled time at which to execute this job on the job server. Use the standard hh:mm:ss AM/PM format, where: hh = hour, mm = minute, and ss = second.

If you selected **Start Time/Date** from the **Execution Option** drop-down list box in the Submit Job to Queue screen, Costpoint automatically displays that time in this field. You can edit this default data.

If you enter data in the **Start Date** field, entry in this field is required.

Priority

This field displays the default priority level for this job. The priority level can be any number from **1** (highest) to **99** (lowest). The job server determines which jobs to process first based on this priority level.

Recur Every

If this is to be a recurring job, use this field to enter the number of hours, days, weeks, or months to on which this job must recur after it has been initially executed on the job server.

If you enter data the **Recurring Timeframe** field, entry in this field is required.

Recurring Timeframe

Use this drop-down list box to select the frequency of recurrence (**Hours**, **Days**, **Weeks**, or **Months**) for this job.

If you enter data in the **Recur Every** field, entry in this field is required.

End Date

Use this field to enter, or click to select, the date on which this recurring job should end. This field is only available for recurring jobs.

If you enter data in the **End Time** field, entry in this field is required.

End Time

Use this field to enter the scheduled time at which to end the recurring job on the job server. Use the standard hh:mm:ss AM/PM format, where hh = hour, mm = minute, and ss = second. This field is only available for recurring jobs.

If you enter data in the **End Date** field, entry in this field is required.

Submitting User

This field displays the ID code of the user who submitted the job to the queue.

Submitted Date/Time

This field displays the date and time that the job was submitted to the queue.

Cancel Job

Click this button to cancel the selected job in the table window.

Subtask

Subtask	Description
Scheduled Job Steps	Click this link to open the Scheduled Job Steps subtask and view the status of all operations that are scheduled within the selected job.

Table Information

Changes to this screen update the following tables:

- JOB_QUEUE
    - JOB_SCHEDULE
    - JOB_SCHEDULE_PARM
    - S_APP_LIST
    - S_RPT_LIST

Job Management Processing

Start/Stop Job Server

This screen is normally restricted to a system administrator for the purpose of starting, stopping, or disabling a job server in Costpoint. A job server must be started and attached to one or more active queues in this screen before jobs can be processed in a job server.

Location

- Administration
- Job Management
- Job Management Processing

Job Servers

Use this block to view job server information and, optionally, select the daily shutdown and startup times.

Server Name

This field displays the name of this job server. This is a predetermined name assigned to the BEA Weblogic server during installation.

Status

This field displays whether a job server is currently **Running** or **Not Running**.

Destination Server

Use this field to enter a valid Java Messaging Service (JMS) queue to which all the job queues in this job server is sent for processing. This way, jobs assigned in this server are processed by a dedicated hardware. Leave this field blank to process the job queues via the default JMS system messaging queue.

Daily Shutdown Time

Use this field to enter the scheduled time each day at which this job server should stop polling the database for the next scheduled job. Use the standard hh:mm:ss AM/PM format, where hh = hour, mm = minute, and ss = second (HH:MM:SS AM or PM).

If you enter data in the **Daily Restart Time** field, entry in this field is required.

Daily Restart Time

Enter the scheduled time each day at which the job server should restart polling the database for the next scheduled job. Use the standard hh:mm:ss AM/PM format, where hh = hour, mm = minute, and ss = second (HH:MM:SS AM or PM).

If you enter data in the **Daily Shutdown Time** field, entry in this field is required.

Start

Click this button to start the selected job server. This makes the job server available for processing jobs.

Stop

Click this button to stop the selected job server. This makes the job server unavailable for processing jobs.

Available Job Queues

This table window displays all available job queues across all available servers.

Job Queue

This field displays the identification code of this queue.

Process Sequentially

This field displays **Y** if this queue has been enabled to process jobs sequentially in the job server. Otherwise, this field displays **N**.

You can enable/disable sequential processing for a job queue by selecting the **Process Sequentially** check box in the Manage Job Queues screen.

Use Parallel SQL

This field displays whether parallel SQL is enabled (**Y**) or disabled (**N**) for a job queue. This option is available only if you are using Oracle DBMS. For other DBMS like MS SQL Server, this option does not display.

You can enable/disable parallel SQL for a job queue by selecting the **Use Parallel SQL** check box in the Manage Job Queues screen.

Select

Click this button to add the selected job queue to the selected server in the **Job Servers** block. The selected job queue is then displayed in the **Assigned Job Queues** table window.

Assigned Job Queues

Job Queue

This field displays the identification code of this queue.

Active for Server

Select this option to make this queue active for the server.

Click  to save any change in this queue's activity status to the database (JOB_QUEUE_LIST table).

Process Sequentially

This field displays **Y** if this queue has been enabled to process jobs sequentially in the job server. Otherwise, this field displays **N**.

You can enable/disable sequential processing for a job queue by selecting the **Process Sequentially** check box in the Manage Job Queues screen.

Use Parallel SQL

This field displays whether parallel SQL is enabled (**Y**) or disabled (**N**) for a job queue. This option is available only if you are using Oracle DBMS. For other DBMS like MS SQL Server, this option does not display.

You can enable/disable parallel SQL for a job queue by selecting the **Use Parallel SQL** check box in the Manage Job Queues screen.

Table Information

Changes to this screen update the following tables:

- JOB_QUEUE_LIST
    - JOB_SERVER

Submit Job to Queue

Use this screen to submit jobs to a queue to execute on a job server. You can execute the job immediately, schedule it to execute at a future time and date, or hold the job. If you hold the job for release, it is submitted to the queue but does not execute until you start it in the Update Job Status screen or the Manage Job Queues (system administrators only) screen. You can also specify whether the job should recur after a certain number of days.

This screen validates whether a job can be submitted to a specific queue, based upon whether the queue has any linked restrictions in the Scheduled Job Steps subtask of the Manage Job Queues screen. The **Submit to Queue** button in this screen performs this validation.

You can click or Query to search for specific jobs.

Before submitting a job to a queue, you must establish records in the following screens:

- Manage Jobs — You must establish jobs in this screen.
- Manage Job Queues — Your system administrator must already have established job queues in this screen.
- Manage Job Groups — This screen is optional. Use this screen if you need to group your jobs using a unique identifier.

Location

- Administration
- Job Management
- Job Management Processing

Jobs

This table window displays all available job IDs within Costpoint. Use this table window to select the specific job, job queue, timing parameters, and to activate the **Submit To Queue** button.

You can use Query to find specific job IDs and display them in this table window.

You can view the parameters of a selected job in the **Job Parameters** table window.

Job

This field displays the identification code for this job.

Description

This field displays the descriptive name for this job ID.

Queue

Use this field to enter, or click to select, the job queue to which you want to submit this job.

Execution Option

Use this drop-down list box to select an execution option for this job. You can select from the following options:

- **Now** — Select this option to execute this job as soon as you click Submit to Queue (if the job server is running).
- **Start Time/Date** — Select this option to execute this job at a future time and date. For this option, you must also specify an execution date and time in the **Start Date** and **Start Time** fields. The job server must be active for the specified future time and date before the job can execute.
- **Hold For Release** — Select this option to submit the job to the queue in this screen but you can delay the execution of the job in the Job Queues screen and in the Monitor Job Status screen.

Priority

This field displays the default priority level for this job. The priority level can be any number from **1** (highest) to **99** (lowest). The job server determines which jobs to process first based on this priority level.

Start Date

Use this field to enter, or click to select, the scheduled date on which to execute this job on the job server. This field is available only if you have selected the **Start Time/Date** option from the **Execution Option** drop-down list box.

If you enter data in the **Start Time** field, entry in this field is required.

Start Time

Use this field to enter, or click to select, the date at which the recurring job should end. This field is available only for if you have selected the **Start Time/Date** option from the **Execution Option** drop-down box.

If you enter data in the **Start Date** field, entry in this field is required.

Recurrence Frequency

If this is to be a recurring job, use this field to enter the number of hours, days, weeks, or months, as appropriate, to specify when this job should recur after it has been initially executed on the job server. Choose the timeframe of recurrence (**Hours**, **Days**, **Weeks**, or **Months**) from the **Recurrence Timeframe** field.

If you select and option in the **Recurrence Timeframe** field, entry in this field is required.

Recurrence Timeframe

If this is to be a recurring job, use this drop-down list box to select the timeframe (**Hours**, **Days**, **Weeks**, or **Months**) to which the value in the Recurrence Frequency field will be based.

If you enter data in the **Recurrence Frequency** field, entry in this field is required.

Recurring End Date

Use this field to enter, or click to select, the date on which the recurring job must end. This field is available only for if you have selected the **Start Time/Date** option from the **Execution Option** drop-down box.

If you enter data in the **Recurring End Time** field, entry in this field is required.

Recurring End Time

Use this field to enter the time at which the recurring job should end. Use the standard hh:mm:ss AM/PM format, where hh = hour, mm = minute, and ss = second.

If you enter data in the **Recurring End Date** field, entry in this field is required.

Notify When Job Is Complete

Select this check box to receive notification through Costpoint Workflow when the job has finished running on the server.

Before using the notify feature, you must import predefined workflows into Costpoint using the **Import Predefined Workflows** toolkit in Costpoint Workflow.

Job Comments

This field displays comments and additional information associated with this selected job.

Submit to Queue

Click this button to submit the selected job in the **Jobs** table window to the specified job queue. This function executes the job based on the following conditions:

- If you selected the **Now** option from the **Execution Option** drop-down box in this screen, the job server will immediately execute the job (if the job server is active and idle).
- If you selected the **Start Time/Date** option from the **Execution Option** drop-down box in this screen and entered data in the **Start Date** and **Start Time** fields, the job server will execute the job at that future time and date (if the job server is running).
- If you selected the **Hold for Release** option from the **Execution Option** drop-down box in this screen, the job will not execute on the job server until you change the status to **Scheduled** in the Manage Job Queues (system administrators only) or Update Job Status screen, (if the job server is running).

You must have rights to all of the Costpoint functions that make up the job. If you do not have full rights to the function, or the function has been set up with read only rights, the job will fail to execute on the job server.

Job Parameters

Use this table window to view the report details that were set up for the job, including the module, application, parameter ID, and process or report, as applicable. The rows in this table window display in the same sequence that was established for the job in the Manage Jobs screen.

Module

This field displays the two-character designation for the Costpoint module associated with the application function to be run in the currently selected job.

Application

This field displays the identification code of the application (calculation, process, or report) to be run in the currently selected job.

Application Name

This field displays the descriptive name for this **Application**.

Parameter

This field displays the identification code of the stored parameters to be used by this application when this job is processed.

Parameter Description

This field displays the descriptive name for this **Parameter**.

Process

If this application executes a process, this field displays the name of the Costpoint application process that will be executed in the job.

Report

If this application generates a report, this field displays the name of the Costpoint application report or process report that will be executed in the job.

Table Information

Changes to this screen update the JOB table.

Update Job Queue Status

Use this screen to view job server status and the list of available queues, and to make a queue active or inactive for the server. This screen is similar to the Start/Stop Job Server screen, in which system administrators can start, stop, and/or disable a job server. The system administrator functionality, however, is not available in this screen, and is designed for users other than system administrators to manage the necessary queues relative to their reporting and processing needs.

Use this screen whenever you need to view job server status, view a list of available queues, and/or make a queue active or inactive for the server. A job server must be started and attached to one or more active queues in this screen before jobs can be processed in a job server.

Before you can use this screen, your system administrator first establish job queues using the Manage Job Queues screen.

Location

Administration

- Job Management
- Job Management Processing

Job Servers

Use this table window to view all available job servers used by Costpoint. When you select a job server in this table window, you can view all available queues assigned to that job server in the **Assigned Job Queues** table window.

Server Name

This field displays the name of this job server (which is a predetermined installation name assigned to the BEA WebLogic server).

Status

This field displays whether a job server is currently **Running** or **Not Running**.

Assigned Job Queues

Use the fields in this table window to view job queue status and to make one or more queues active for the job server.

Job Queue

This field displays the identification code for this job queue.

Active for Server

Select this check box to enable this job queue for the selected job server.

Process Sequentially

This field displays **Y** if this job queue processes jobs sequentially. Otherwise, this field displays **N**.

Use Parallel SQL

This field displays **Y** if this job queue uses parallel SQL functionality. Otherwise, this field displays **N**.

Table Information

Changes to this screen update the following tables:

- JOB_QUEUE_LIST
    - JOB_SERVER

Update Job Status

This screen displays the jobs in the job queue. It provides information on the status of a particular queue, the attached server(s), and the jobs that the queue contains. You can edit the **Status**, **Start Time**, and **Start Date** fields of a specific job. You can edit a job only if you have submitted it to a job queue. Before a job is added to this screen, you must submit the job to the queue using the Submit Job to Queue screen. When the job server executes a job, **Executing** displays in the **Status** field. If the job is not executed successfully because of a job server failure, **Aborted** displays in the **Status** field.

This screen is similar to the Manage Job Queues screen but does not have administrator functions such as creating a new queue. You can update or delete the job already sent to the queue if **Aborted**, **Hold**, or **Suspended** displays in the **Status** field. If **Executing** displays in the **Status** field, you cannot edit the job. Remember to click on the toolbar whenever you update or delete the jobs in this screen.

The **Server** and **Status** fields are non-editable. You can make changes to the attached server or to the server's status using the Update Job Queue Status screen.

Before you can use this screen, you must first create a job in the Manage Jobs screen and submit it in the Submit Job To Queue screen. After you click or Query to select a queue, the fields in this screen will be populated. You can then use this screen to edit the jobs that you submitted.

If **Suspended** displays in the **Status** field, the **Start Time** and the **Start Date** will determine when the job is executed on the job server.

Location

- Administration
- Job Management
- Job Management Processing

Job Queues

This table window displays all available job queues used by Costpoint. When you select a job queue in this table window, all job servers attached to that job queue displays in the **Attached Servers** table window.

Job Queue

This field displays the identification code for this job queue.

Process Sequentially

This field displays **Y** if this job queue processes jobs sequentially. Otherwise, this field displays **N**.

Attached Servers

This table window displays all job servers attached to the selected job queue in the **Job Queues** table window.

Server

This field displays the name of this job server (which is a predetermined installation name assigned to the BEA WebLogic server).

Queue Active

This field displays **Y** if this job server is active. Otherwise, this field displays **N**.

Scheduled Jobs

Use this table window to view and modify the details of scheduled jobs.

Job

This field displays the job ID of each job that has been submitted to the queue.

Description

This field displays the description of the job ID in the **Job** field. Job descriptions are set up in the Manage Jobs screen.

Status

This drop down list box displays the current status of the job. They are as follows:

- **Scheduled** — The job is executed as soon as it reaches the top of the entry list and a server is available.
- **Hold** — The job is not executed until you change the status to Scheduled.
- **Executing** — The job server is currently processing this job. You cannot change the status in this circumstance.
- **Aborted** — The job was submitted but was not executed successfully. You cannot change the status of an Aborted job, but you can delete the entry.
- **Queued** — The job was submitted and is currently queued for processing.
- **Suspended** — The job was submitted but is currently suspended to be processed at a future date and time.
- **Canceling** — The job was submitted and processed and is currently being cancelled by Costpoint.

You can change the status of a job by selecting one of the options from this drop-down list box.

To execute a job, select **Scheduled** from this drop-down list and enter the scheduled date and time in the **Start Date** and **Start Time** fields, respectively.

If you change the status from **Scheduled** to **Hold**, Costpoint automatically clears the data in the **Start Date** and **Start Time** fields after you save this job queue.

If you change the status from **Hold** to **Scheduled** and you have not entered a start date or time, Costpoint automatically enters the current date and time in the **Start Date** and **Start Time** fields you save this job queue.

Costpoint automatically changes the job status to **Aborted** if the application fails as a result of server failure. Any jobs with a status of **Executing** will be set to **Aborted** when a server is brought up after failure.

Start Date

Use this field to enter, or click to select, the scheduled date on which to execute this job on the job server.

If you selected **Start Time/Date** from the **Execution Option** drop-down list box in the Submit Job to Queue screen, Costpoint automatically displays that date in this field. You can edit this default data.

If you enter data in the **Start Time** field, entry in this field is required.

Start Time

Use this field to enter the scheduled time at which to execute this job on the job server. Use the standard hh:mm:ss AM/PM format, where: hh = hour, mm = minute, and ss = second.

If you selected **Start Time/Date** from the **Execution Option** drop-down list box in the Submit Job to Queue screen, Costpoint automatically displays that time in this field. You can edit this default data.

If you enter data in the **Start Date** field, entry in this field is required.

Priority

This field displays the default priority level for this job. The priority level can be any number from **1** (highest) to **99** (lowest). The job server determines which jobs to process first based on this priority level.

Recur Every

If this is to be a recurring job, use this field to enter the number of hours, days, weeks, or months to on which this job must recur after it has been initially executed on the job server.

If you enter data the **Recurring Timeframe** field, entry in this field is required.

Recurring Timeframe

Use this drop-down list box to select the frequency of recurrence (**Hours**, **Days**, **Weeks**, or **Months**) for this job.

If you enter data in the **Recur Every** field, entry in this field is required.

End Date

Use this field to enter, or click to select, the date on which this recurring job should end. This field is only available for recurring jobs.

If you enter data in the **End Time** field, entry in this field is required.

End Time

Use this field to enter the scheduled time at which to end the recurring job on the job server. Use the standard hh:mm:ss AM/PM format, where hh = hour, mm = minute, and ss = second. This field is only available for recurring jobs.

If you enter data in the **End Date** field, entry in this field is required.

Submitting User

This field displays the ID code of the user who submitted the job to the queue.

Submitted Date/Time

This field displays the date and time that the job was submitted to the queue.

Cancel Job

Click this button to cancel the selected job in the table window.

Subtask

Subtask	Description
Scheduled Job Steps	Click this link to open the Scheduled Job Steps subtask and view the status of all operations that are scheduled within the selected job.

Job Management Reports/Inquiries

Print Job Report

Use this screen to print a report of the jobs and/or job groups that have been set up in Costpoint.

This report prints data related to the job, including the job ID, job description, job group (as applicable), creator and creation date, last modification date, comments, and your selection of the action to be taken in the event of function failure.

This report also lists the Costpoint applications and the sequence in which they will be executed for the job, as well as the module, application name, parameter ID and parameter description.

Before you can use this screen, you must first create jobs using the Manage Jobs screen. If you want to print by job group, you must also create job groups using the Manage Job Groups screen. After you establish jobs and/or job groups, you can run this report as often as you choose.

After you finish entering your preferences, click on the toolbar to start generating the report.

Location

- Administration
- Job Management
- Job Management Reports/Inquiries

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use this block to select the job and/or job group you want to include in this report, as applicable.

Option

Use this drop-down box to select the range of job(s) or job group(s) you want to use. The following options are available:

- **All** — Select this option to include all available records. The Start and End fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the Start field. The End field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the Start field and the ending value of the range in the End field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the End field. The Start field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the Start field. The End field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Start

Use this field to enter, or use 🔍 to select, the starting job group, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending job group, as applicable.

Sort By

Use the fields in this group box to select the sort option and to specify a page break option.

1st Sort

Use this drop-down list box to choose whether to sort this report by **Job** or **Job Group**.

Page Break

Select this check box to inset a page break after each job or job group entry (depending on your selection in the **1st Sort** drop-down box).

Table Information

Changes to this screen update the W_FUNC_PARM_CATLG table.

View Action and Report Status

Use this screen to monitor the overall workload on the job server and view the status details of the jobs being processed. This screen is normally used by a system administrator, however, other users may also benefit from access to this screen since the application functionality enables status monitoring of each job submitted to the server, including reports, processes, and other jobs.

All data is on this screen is read-only, which can be filtered by user, application, starting and ending dates, job status, and execution method.

There are two versions of this screen:

- This screen (SYQJSTAT) allows you to filter by user.
- The **View Action** and **Report Status** screen (SYQJSTAT2), located in the **System Administration** module, does not allow you to filter by user. The **User** field displays the logged-in user ID and is disabled. You can also access this screen by clicking **Process » View Action and Report Status** from the **Global** menu.

After specifying your options, click on the toolbar to display the data in the **Job Step Details** table window.

Location

- Administration
- Job Management
- Job Management Reports/Inquiries

User

Use this field to enter, or use to select, a user ID with which you want to filter the inquiry data.

Application

Use this field to enter, or use to select, an application with which you want to filter the inquiry data.

Execution Method

Use this drop-down list box to select an execution method with which you want to filter the inquiry data. The following options are available:

- API
- Batch
- Batch API
- Scheduled Job
- Interactive

Starting Date

Use this field to enter, or use to select, a starting date with which you want to filter the inquiry data.

Ending Date

Use this field to enter, or use to select, an ending date with which you want to filter the inquiry data.

Job Status

Use this group box to further filter your inquiry by the status of the jobs submitted to the job server.

Scheduled

Select this check box to display all jobs that are have been submitted to the job server but will be processed at a specific date and time.

Active

Select this check box to display all jobs that are currently being processed by the job server and those that have not started.

Completed

Select this check box to display all jobs that have been processed successfully.

Failed

Select this check box to display all jobs that were not processed successfully due to an error.

Hold

Select this check box to display all scheduled jobs that have been postponed for a later date and time.

Suspended

Select this check box to display all active jobs that have been suspended.

Cancel Requested

Select this check box to display all scheduled jobs that are requested to be aborted.

User Cancelled

Select this check box to display all jobs that have been cancelled by a user.

Job Step Details

This table window displays the details of your inquiry based on your specifications in this screen. This table window populates when you click on the toolbar.

Application Name

This field displays the descriptive name of the application responsible for running this job step.

Report Name

If this application generates a report, this field displays the descriptive name for that report.

Action Name

If this application performs an action, this field displays the descriptive name for that action.

Submitting User

This field displays the user ID of the individual who submitted this job to the job server.

Company

This field displays the company ID with which the **Submitting User** is associated.

Execution Method

This field displays the execution method used by this application. The execution methods are:

- API
- Batch
- Batch API
- Scheduled Job

- Interactive

Priority

This field displays the priority level for this job step. The job server determines which jobs should be processed first based on this priority level.

Restartable

This field displays **Y** if this job step can be restarted. Otherwise, this field displays **N**.

Status

This field displays the current status of this job step. The status of a job step can be one of the following:

- **Scheduled** — This status indicates that a job has been submitted to the job server but will be processed at a specific date and time.
- **Active** — This status indicates that a job is currently being processed or waiting to be processed by the job server.
- **Completed** — This status indicates that a job has been processed successfully.
- **Failed** — This status indicates that a job was not processed successfully due to errors.
- **Hold** — This status indicates that a scheduled job has been postponed to an indefinite date and time.
- **Suspended** — This status indicates that a job has been suspended in the middle of processing.
- **Cancel Requested** — This indicates that a job has been requested to be cancelled.
- **User Cancelled** — This indicates that a job has been cancelled by a user.

Submitted Date/Time

This field displays the date and time on which this job step was submitted to the job server.

Detailed Status

This field displays more detailed information about the status of this job step.

Started Date/Time

This field displays the date and time on which this job step was started.

End Date/Time

This field displays the date and time on which this job step was processed successfully, aborted due to errors, or cancelled by a user.

Job Step

This field displays the sequence number of this job step within its associated job.

Percent Complete

This field displays the progress of this job step represented in percentage (%).

Cancelled By

This field displays the user ID of the individual who cancelled this job step.

Application Status 1

This field displays a detailed information about the application's progress in completing this job step.

Application Status 2

This field displays additional information about the application's progress in completing this job step.

Report Status

If this job step generates a report, this field displays a detailed information about the application's progress in generating this report.

Job

This field displays the job ID associated with this job step.

Job Name

This field displays the descriptive name for this **Job**.

Job Queue

This field displays the job queue ID to which this job was submitted.

Job Sequence

This field displays the sequence number of this job within the **Job Queue**.

Retry Status

This field displays information about the attempt to restart this job step. This only applies to jobs sent in batch mode.

Retry Period

This field displays the time (in minutes) to elapse before retrying the process or report. This only applies to jobs sent in batch mode.

Total Number of Retries

This field displays the number of times this job step has been restarted due to errors. This only applies to jobs sent in batch mode.

Previous Retry Attempts

This field displays the number of times the job server attempted to restart this job step. This only applies to jobs sent in batch mode.

Last Retry Date/Time

This field displays the date and time on which this job step was restarted. This only applies to jobs sent in batch mode.

Cancel Job

Click this button to abort the currently selected job step.

Subtask

Subtask	Description
Restartable Job Details	Click this link to open the Restartable Job Details subtask and view the job sequence, step type, description, and start and end date/time details for each restartable job that failed or was cancelled by the user.

Subtask	Description
Scheduled Job History	Click this link to open the Scheduled Job History subtask and view the status of all operations that are scheduled within the current job.

Table Information

Changes to this screen update the following tables:

- JOB
    - JOB_SCHEDULE_HIST
    - JOB_SCHEDULE_PARM
    - POST_SEMAPHORE
    - S_APP_LIST
    - S_RPT_LIST

Job Management Utilities

Print/Purge Job History

Use this screen to print or purge the history of jobs that have been executed on the job server. The generated report prints information related to each process including job, job description, parameter ID, parameters description, start time, stopped time, and any messages from the function being executed. You can also purge the job history from the database using the criteria that you select. You should run the purge function routinely to clear unwanted process histories.

You cannot print or purge the process history unless processes have been processed on the job server.

You can print a purge list prior to the purge or you can purge the data without first printing a purge list. Do one of the following:

- To print a purge list, click or on the toolbar.
- To run the purge process, click on the toolbar or right-click on the screen to display an option for a standard Purge Job History or for one in batch mode.

Location

- Administration
- Job Management
- Job Management Utilities

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click Query to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use this block to select the information associated with the jobs you want to purge, as applicable.

Job

Use this drop-down box to select the range of jobs you want to purge for this process. The following options are available:

- **All** — Select this option to include all available records. The Start and End fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the Start field. The End field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the Start field and the ending value of the range in the End field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the End field. The Start field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the Start field. The End field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Submitting User

Use this drop-down box to select the range of submitting users you want to use for this process. The following options are available:

- **All** — Select this option to include all available records. The Start and End fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the Start field. The End field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the Start field and the ending value of the range in the End field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the End field. The Start field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the Start field. The End field is disabled if you select this option.

The default selection for this field is All. If you have a large number of jobs, you may not want to use this default option.

Start Date

Use this drop-down box to select the range of start dates you want to use for this process. The following options are available:

- **All** — Select this option to include all available records. The Start and End fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the Start field. The End field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the Start field and the ending value of the range in the End field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the End field. The Start field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the Start field. The End field is disabled if you select this option.

The default selection for this field is All. If you have a large number of jobs, you may not want to use this default option.

Completion Date

Use this drop-down box to select the range of completion dates you want to use for this process. The following options are available:

- **All** — Select this option to include all available records. The Start and End fields are disabled for if you select this option.
- **One** — Select this option to include only one record. You must enter that value in the Start field. The End field is disabled if you select this option.
- **Range** — Select this option to include a contiguous range of records. You must enter the beginning value for the range in the Start field and the ending value of the range in the End field.
- **From Beginning** — Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the End field. The Start field is disabled if you select this option.
- **To End** — Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the Start field. The End field is disabled if you select this option.

The default selection for this field is **All**. If you have a large number of jobs, you may not want to use this default option.

Start

Use this field to enter, or use 🔍 to select, the starting job group, as applicable.

End

Use this field to enter, or use 🔍 to select, the ending job group, as applicable.

Options

Use this group box to specify additional options you want to use for this process.

Days Prior to Current Date

Use this field to enter the number of days prior to the current date to purge, based on the job completion date. The completion date is stored as the ACT_COMPLETE_DTT field in the JOB_SCHEDULE_HIST table.

All processes, reports, and/or computations that fall within that range and that also meet your other selection criteria (jobs, submitting users, start dates) will be printed and/or purged.

For example, if the current date is 3-14-05, if a job completed on 12-31-04, and you specify 60 in this field, the application will print and/or purge job server history data in the range from the current date out to the number of days prior to the current date.

Current Date: 3-14-05

Data in JOB_SCHEDULE_HIST table, ACT_COMPLETE_DTT field:

12-03-04

12-16-04

2-15-05

3-14-05

Days Prior to Completion:

1-26:	3-14-05
27-87:	3-14-05, 2-15-05
88-100:	3-14-05. 2-15-05, 12-16-04
101:	3-14-05, 2-15-05, 12-16-04, 12-02-04

If you select any range option other than **All** in the **Completion Date** field, you must not use this field. Costpoint will display an error message if you try to enter data for both the **Completion Date** selection field and this field.

Table Information

Changes to this screen update the W_FUNC_PARM_CATLG table.

Job Management Controls

Configure Application Batch Job Settings

Use this screen to specify submission, retry, and notification parameters for individual process or report applications or for given long run actions associated with the applications.

You do not have to set up a record for every process application or report. Selections you make here override default settings made in the Configure System Settings screen and provide application unique execution restrictions.

Use this screen when you need to specify exceptions to the default submission, retry, and notification parameters for batch jobs made in the Configure System Settings screen.

Click on the toolbar after specifying your settings.

Location

- Administration
- Job Management
- Job Management Processing

Identification

Use this group box to select the application to which you want to apply the settings on this screen. Optionally, you can select a particular process or report within this application.

Use New to add a new record or Query to open and edit an existing record.

Application

Use this field to enter, or use to select, the application ID to which you want to apply the settings on this screen. The field to the right displays the descriptive name for this application. You can use from either field to select an application.

Process

Use this field to enter, or use to select, a particular process ID to which you want to apply the settings on this screen. The field to the right displays the descriptive name for this process. You can use from either field to select a process.

Report

Use this field to enter, or use to select, a particular report ID to which you want to apply the settings on this screen. The field to the right displays the descriptive name for this report. You can use from either field to select a report.

Options

Use this group box to specify the setting you want to apply to the selected application.

Enable Interactive Execution

Select this check box to enable non-batch (interactive) execution of the selected process or report.

Queue

Use this field to enter, or use 🔍 to select, the job queue that the process or report uses in batch mode.

Allow Queue to be Changed

Select this check box to enable the users to change the job queue when executing the process or report in batch mode.

Batch Mode Priority

Use this field to enter a value that determines the priority level for this application when it is submitted for processing in batch mode. You can enter a value from **1** (highest) to **99** (lowest).

Allow Priority to be Changed

Select this check box to enable users to change the priority level when submitting this application for processing in batch mode.

Number of Retries

Use this field to enter the desired number of retry attempts before failing the process or report. Enter zero in this field to disable the retry feature.

Retry Period

Use this field to enter the time (in minutes) to elapse before retrying the process or report.

Send Successful Emails

Use this drop-down box to select whether (**Yes**) or not (**No**) to send an email when a job report completes successfully. When you select **None**, Costpoint uses the system default value.

Send Unsuccessful Emails

Use this drop-down box to select whether (**Yes**) or not (**No**) to send an email when a job report completes unsuccessfully. When you select **None**, Costpoint uses the system default value.

For the user initiating the batch job, if the **Notify When Batch Job Is Completed** check box is selected in the **Status** group box on the **Information** tab of the **Manage Users** screen, that user receives an email when the job completes either successfully or unsuccessfully.

Special Topics

Application Locking/Dynamic Tables

Overview

This special topic discusses the following interconnected concepts:

- **Application Locking** — This concept limits who can run and when they can run which applications.
- **Dynamic Tables** — This concept dictates one of the rules governing application locking.

What is Application Locking?

Deltek has assigned an application locking code to every function in Costpoint. The code can be one of the following:

- **Single** — This code means only one user may run the function at a time.
- **User** or **Restart** — This code means many users can run the function at the same time but each user must be logged into Costpoint with a different user ID.
- **None** — This code means many users may run the function at the same time with no restrictions.

When a user starts a function with either a single or user/restart lock code, Costpoint records the fact that the function is open and who opened it. When another user, or the same user on another computer, tries to start the same function, Costpoint checks the log and does allow the startup of the second request if the new user violates the application's locking rule. That is, if the application's locking rule is single, then the new user is not allowed to start up the function. This second user receives this message: 'You cannot access this single user function because another user is working with it.'

If the application's locking rule is user and the second user's ID is the same as the user ID under which the executing function's login was made, the second workstation is not allowed to start up the function. This duplicate user receives this message: 'You cannot access this function because you are already working with it on another workstation.'

What are Dynamic Temporary Tables?

Locks are put on functions for technical reasons. The less restrictive locks, user and restart, are required on those functions that use dynamic temporary tables. Dynamic temporary tables are worktables created and dropped in the same application. Since they are temporary and built as part of the process, and since there can be multiple copies of them at one time (that is, one copy for each user running the function at a given moment), Deltek decided to build the tables in the tablespace of the user running the application. This way, Costpoint knows whose table is whose. But this also means that a user cannot run the function with the same user ID on more than one workstation. (The same-named table cannot exist more than once in a tablespace.)

Those functions with the most restrictive lock, single, may also use dynamic temporary tables, but they are more stringent for two other reasons. One reason is that the functions write to permanent worktables that do not know whose records are whose. If two users were running the same application, their records would become mixed up and the results would be unpredictable.

The second cause for single application locks is to prevent the possible shutdown of the database. Some functions, if run by more than one person at a time, lock the database. For example, when two people are running the same posting program, they are both selecting from the same ledger and writing to the same ledger. The contention for these records bottles up the database so that the database stops responding to anyone, and single locks result.

Side Effects of Using Application Locking

From time to time, a function will be closed without the normal shutdown procedures taking place. This usually happens when the workstation is turned off or the workstation loses power with the function still active, or the database shuts down. In these situations, the application remains locked; anyone attempting to run the application after the abnormal close receives the message that someone is already working with it. To remove the lock, clear the original user's session from the list of logged-in Costpoint users on the Clear Users screen. Clearing users frees up the license count and removes application locks.

To alleviate some of the nuisance of the user side effects, Costpoint has a variation of user locks called restart locks. Restart locking is applied to those reports and/or processes that does not corrupt data in the database if they are resumed after an abnormal termination.

Restart locks work like user locks except that your system administrator does not have to clear the original user's session before the same user can restart a function. The message a user gets when trying to resume an aborted function is: 'You are already working with this function on another workstation. Select OK to close down that session and continue with this Startup, or Cancel to abort this Startup.' If you click **OK**, the other application that is/was running is stopped and the function screens appear. If you click **Cancel**, the function's screen does not appear.

There is one residual drawback to the restart lock. The prior connection still uses up a license. The only way to free up the license is to have your system administrator remove the prior session using the Clear Users screen. Let your system administrator know whenever you restart a restart-locked application so that he or she can clear your prior connection at a time convenient for them.

Restart locks thus have two benefits:

- Users do not have to wait for your system administrator to unlock the aborted function.
- When the resumed session is completed, the orphaned dynamic temporary tables are dropped.

How to Determine a Function's Application Locking Code

If you need to find out what type of locking code has been assigned to a function, connect to the database through SQLTalk using the User ID of DELTEK. Then issue the following command:

```
SELECT S_LOCK_MTHD_CD FROM S_APPL_FUNC WHERE
FUNC_TITLE_NAME = 'function title';
```

'function title' must match exactly the name of the function as it appears on the Navigate screen. That means entering the exact spacing and upper- and lower-case letters.

S_LOCK_MTHD_CD must be **N** for no locking, **S** for single locking, **U** for user locking, or **R** for restart locking.

Saving Screen Configuration

Costpoint allows you to modify, save, and reset result set and toolbar configurations. You can customize and save screen components for your user ID and a UI profile.

This feature does not apply to extensibility modifications. It only allows you to customize the table view or result sets, resize and reposition result sets (in form and table view). Changes to form view layouts, labels, and rules are handled by the extensibility unit features.

Screen Configuration Panel

You can access the Screen Configuration panel by selecting **Screen Configuration** from the **Options** menu or click the on the top-right corner of your Costpoint screen. Changes you make using this panel only applies to your user ID.

User, Company, and System Information

The top part of the Screen Configuration Panel displays your user ID as well as other information about the Costpoint system, into which you are logged. These information include the following:

- **Company** — This information displays the identification code of the company, into which you are logged.
- **System** — This information displays the name of the database Costpoint is currently accessing.
- **Validation Frequency** — This information displays the validation method Costpoint is currently using.

You enter these information on the login screen when you start Costpoint.

Configuration

The **Configure** block allows you to customize top-level toolbar icons and My Menu configurations and save them for your user ID and/or a UI profile. You must first launch a screen before you can use the options in this block.

You can only save your changes if the **Allow Saving of Personal Screen Configurations** check box is selected on the User Interface tab of the Manage Users screen for your user ID. Otherwise, you cannot save your settings and the changes you make are only applicable to your current session and are not retained when you log into Costpoint on future sessions.

Administrator Profile

The Administrator Profile block allows you to select a UI profile you want to edit. All the changes you make to this UI profile applies to all the users who are using this UI profile.

You can only save your changes if the Allow Screen Configuration Changes for UI Profiles check box is selected on the User Interface tab of the Manage Users screen for your user ID.

Customizing Your Screen

Use the Configuration block to customize your screen for your user ID. This block allows you to select the buttons you want to display on your toolbar as well as select the applications you want to appear on your My Menu.

To edit a UI profile, you must first close all active applications. You can then select a UI profile from the drop-down list in the **Administrator Profile** block and then click **Enter Profile**. changes to to indicate that you are in the edit UI profile configuration mode. All the changes you make while in this mode are applied to the selected UI profile, instead of your user ID.

Selecting Toolbar Buttons

Click **Modify** beside the **Top-level Toolbar** label in the **Configuration** block of the Screen Configuration panel to open the Save Toolbar Configuration dialog box. Use this dialog box to select the buttons you want to display on your toolbar. The content of this dialog box depends on the type (data entry, reporting, or processing) of the currently active screen. This dialog box allows you to do the following:

- To add a toolbar button to your toolbar, select (hold Shift or Ctrl on your keyboard to make multiple selections) a button from the **Available buttons** field and then click **Add** to transfer you selection to the **Selected buttons** field.
- To remove a toolbar button from your toolbar, select (hold Shift or Ctrl on your keyboard to make multiple selections) a button from the **Selected buttons** field and then click **Remove** to transfer you selection to the **Available buttons** field.
- To rearrange the order of the buttons on your toolbar, select a button from the **Selected buttons** field and then click **Up** or **Down** to move that button to your desired position on your toolbar.
- Select the **Show Toolbar Buttons with Labels** check box to display the labels for each button on your toolbar.

After you make your changes, click **Save** to apply your settings to your toolbar and close the Save Toolbar Configuration dialog box. The Screen Configuration panel then features an option to **Reset** your changes to the default configuration.

Customizing My Menu

My Menu allows you to access shortcuts to the applications you frequently use without navigating through the entire Costpoint menu. Use this table window to set up a list of those applications.

You can access My Menu by clicking on the upper-left portion of your screen.

Click **Manage** beside the My Menu label in the **Configuration** block of the Screen Configuration panel to open the Configure User Preferences screen. You can then use the **My Menu** block of this screen to select the applications you want to add or remove from your My Menu.

Saving Your Configuration

To save your current configuration, click **Save** beside the **Current Application Layout** label. Your changes are then saved for your user ID or the UI profile you are editing and will be applied to your screen whenever you log into Costpoint.

When you click **Exit Profile** without saving while in edit UI profile configuration mode, your changes are discarded and the UI profile is not saved.

Using Multiple Companies

Overview

Costpoint offers multi-company functionality which allows taxable entities to share a common database while, at the same time, individual companies can make their own selections regarding security, business rules, and functional currency.

You establish multi-company capabilities by assigning a unique company ID to each company. The company ID is associated with and assigned to each transaction, organization, reference number, reorganization, project, employee, and product.

Security

You must assign one or more company ID(s) to the users when setting them up for the first time in Costpoint. You can grant or limit user access to a specific company or companies. For each company ID, you can assign users a user group and/or an org security group. Each user can access only the Costpoint modules, applications, and organizations that have been assigned to his group.

Business Rules

In order to establish different business rules for each company, you must complete the settings screens for each company in Costpoint. (You may need to define segment levels and lengths for project structures, set up financial statements, designate A/P voucher approvers, establish pay periods for payroll, etc.)

Settings Screens and Corporate Settings

You must initialize settings screens for each company.

You must, however, initialize some settings screens at the corporate level for global business rules that are established across the entire database and are therefore applied to each company. These rules include setup in the following areas:

- Countries and states;
- Fiscal years, periods, and accounts;
- Definition of the first segment length for organizations;
- Reference numbers and reorganizations;
- Customer terms, types, credit limits, and credit ratings;
- Project types and change order statuses;
- Individual social security numbers to be used for employee IDs; and
- Federal, state, and local taxes.

Please review the Costpoint initialization checklist for a complete list of Settings screens, along with the company or corporate level setup requirements of each.

Functional Currency

You must also specify the functional currency for each company that you set up in Costpoint. The currency may differ from company to company. The functional currency is the currency used to prepare the financial statements and maintain the general ledger.

How Multi-Company Functionality Affects Costpoint Modules

General Ledger

- Accounts are shared by the entire database and are not unique to each company.
- Financial statements are set up and computed by company.
- Journal entries are assigned to a specific company. Organizations that have not been assigned to that company cannot be used in the journal entry. Cross-company journal entries are not currently possible.

Accounts Payable/Accounts Receivable

- Vendors and customers are assigned to a specific company, and each must be unique across the entire database and cannot be reused for another company.
- Vouchers and cash receipts are assigned to a specific company and cannot be reused for another company.

Projects Modules

- Projects are assigned to a specific company.
- Projects can be charged labor expenses only for employees belonging to the same company as the project.

- Projects can be charged non-labor expenses only for vouchers posted to the same company as the project.
- Labor and non-labor expenses incurred for a project other than the owning company can be transferred by an inter-company transaction, using Costpoint inter-company work orders (IWOs).

Employee

- Employees are assigned to a specific company.
- If an employee becomes an employee of another company, either through a transfer or by leaving and then returning, you must set up the employee with a new employee ID.

Materials Modules

- Items (and associated bills of material) are assigned to a specific company if the **Separate Items by Company** check box is selected in the Corporate Settings block of the Configure Product Definition Settings screen. Otherwise, items are shared by all companies.
- Routings, inventory, orders, and requisitions must be set up by specific company.
- Material Requirements Planning (MRP) can be run by specific company or across all companies.
- Costpoint Procurement Planning will allow different transactional currencies on each requisition.

Determining When to Set Up Multiple Companies

Carefully think things over before setting up new companies in Costpoint. If separate taxable entities exist that require different functional currencies, different levels of security, and/or different business rules, setting up a new company in the same database may be appropriate. You can use one of Deltek's Enterprise Tools designed specifically for consolidations and budgeting to consolidate the reporting of different companies that share the same database.

If your objective is only to enable separate reporting capabilities, do not create a new company. Instead, create the taxable entities within the same company and assign them to a unique organization. If the organizations used to assign the taxable entities roll up to the same top-level organization, you can get consolidated reporting without using Costpoint Consolidations.

Setting Up a New Company

Costpoint is delivered with Company 1 already set up as a default. Following is a list of steps detailing how to create one or more additional companies and their system security. For additional information, see the documentation for the appropriate screens.

To set up a new company, complete the following steps:

1. Initialize the Set Up Company screen.
2. Use the Manage Users screen to set up user permissions. Users will not be able to access the new company until they have been given permission.
3. Use the Configure Company Information screen to set up additional taxable entities for the new company.

Switching to a Different Company When Logged Into Costpoint

To log into a different company, complete the following steps:

1. Close all Costpoint application screens.
2. From the Costpoint menu bar, select **Options > Select Company**. The Select Company dialog box displays.
3. Use the drop-down box to choose a company and click **Change**. This will log you into the selected company.

You can see data only for companies for which you have been allowed access.

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